



MARKET TRENDS

FOR WEEK ENDING DECEMBER 22, 2017



MARKET TRENDS

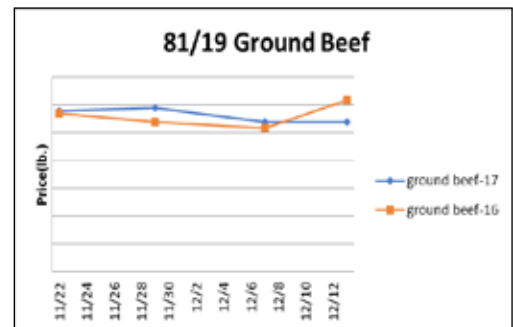
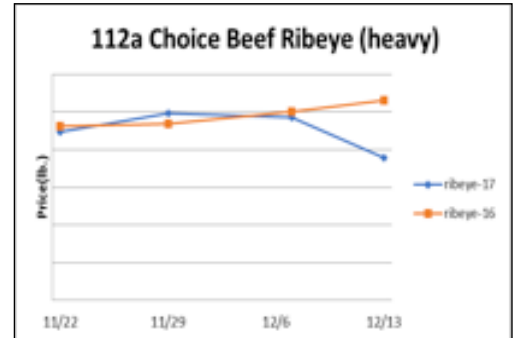
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Beef, Veal & Lamb

Beef production last week declined 1.5% but was up 3.4% from the same week last year. Cattle supplies should seasonally tighten in the coming weeks which, along with the holidays, will limit beef output. Beef demand has been lackluster as of late except for holiday cuts. Spot negotiated beef shipments last week fell to a three-week low. Forward negotiated beef sales for choice and select boxed beef, as well as ground beef, have been trending significantly below 2016. Holiday beef item cuts should track downward during the final weeks of the year. U.S. beef exports in October were the second biggest for the month since 2014, but trade with China remains minimal.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Decreasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Higher
Ground Beef 81/19	Increasing	Good	Lower
Ground Chuck	Increasing	Good	Higher
109 Export Rib (ch)	Decreasing	Good	Lower
109 Export Rib (pr)	Increasing	Good	Higher
112a Ribeye (ch)	Decreasing	Good	Lower
112a Ribeye (pr)	Increasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Decreasing	Good	Higher
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Decreasing	Good	Higher
116b Chuck Tender (ch)	Decreasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Lower
120a Brisket (ch)	Increasing	Good	Lower
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Increasing	Good	Higher
121e Cap & Wedge	Decreasing	Good	Lower
167a Knuckle, Trimmed (ch)	Increasing	Good	Higher
168 Inside Round (ch)	Increasing	Good	Higher
169 Top Round (ch)	Decreasing	Good	Higher
171b Outside Round (ch)	Decreasing	Good	Higher
174 Short Loin (ch 0x1)	Decreasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Higher
180 0x1 Strip (ch)	Increasing	Good	Higher
180 0x1 Strip (pr)	Decreasing	Good	Higher
184 Top Butt, boneless (ch)	Increasing	Good	Higher
184 Top Butt, boneless (pr)	Increasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Decreasing	Good	Higher
185c Loin, Tri-Tip (ch)	Increasing	Good	Higher
189a Tender (sel, 5 lb & up)	Decreasing	Good	Higher
189a Tender (ch, 5 lb & up)	Decreasing	Good	Higher
189a Tender (pr, heavy)	Decreasing	Good	Higher
193 Flank Steak (ch)	Increasing	Good	Higher
50% Trimmings	Decreasing	Good	Higher
65% Trimmings	Increasing	Good	Higher
75% Trimmings	Decreasing	Good	Higher
85% Trimmings	Steady	Short	Higher
90% Trimmings	Decreasing	Short	Higher
90% Imported Beef (frz)	Decreasing	Good	Higher
95% Imported Beef (frz)	Increasing	Good	Higher
Veal Rack (Hotel 7 rib)	Increasing	Good	Higher
Veal Top Round (cap off)	Increasing	Good	Higher



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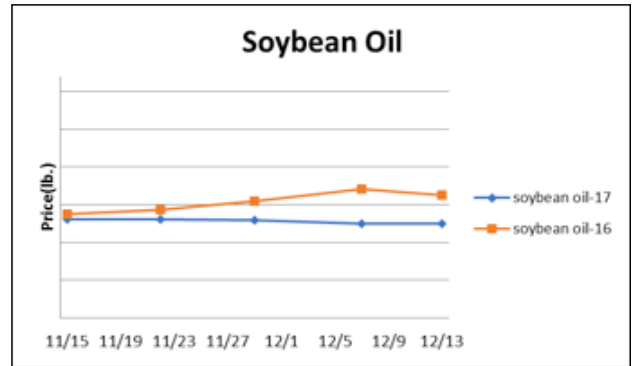
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Grains

The 2018-19 domestic winter wheat crop is entering dormancy with rather subpar historical crop ratings. Further, the longer-term weather forecast points to continued dryness in the Southern Plains- a major high protein winter wheat region. This may cause some volatility in wheat prices in the coming months.

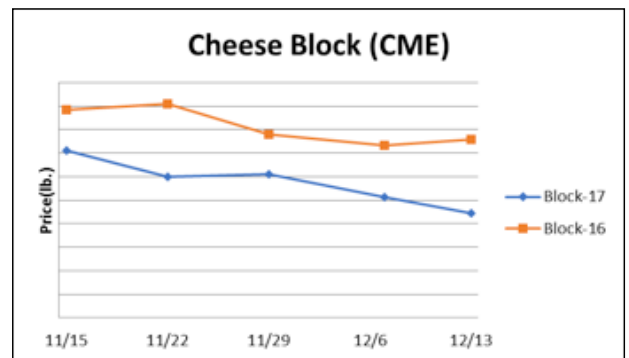
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Steady	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Lower
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Same
Distillers Grain, Dry	Increasing	Good	Higher
Crude Palm Oil, lb BMD	Decreasing	Good	Lower
HRW Wheat, bushel	Decreasing	Good	Higher
DNS Wheat 14%, bushel	Decreasing	Good	Higher
Durum Wheat, bushel	Increasing	Short	Higher
Pinto Beans, lb	Steady	Good	Lower
Black Beans, lb	Steady	Good	Lower
Rice, Long Grain, lb	Decreasing	Good	Higher



Dairy

The CME cheese markets have moved in opposite directions as of late with barrels carrying a record premium to blocks. Cheese barrel supplies have tightened due in part to demand, causing the abnormal pricing. The large spread between the two markets suggests that the downside price risk in cheese blocks from here is likely nominal, while the upside is almost certainly minimal in barrels. The seasonal tendency for both is lower during the last few weeks of the year. The butter market has remained fairly range-bound. Butter prices could soften further during the next few weeks.

Description	Market Trend	Supplies	Price vs. Last Year
Cheese Barrels (CME)	Increasing	Good	Lower
Cheese Blocks (CME)	Decreasing	Good	Lower
American Cheese	Increasing	Good	Higher
Cheddar Cheese (40 lb)	Decreasing	Good	Lower
Mozzarella Cheese	Decreasing	Good	Lower
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Decreasing	Good	Lower
Butter (CME)	Increasing	Good	Higher
Nonfat Dry Milk	Decreasing	Ample	Lower
Whey, Dry	Decreasing	Good	Lower
Class 1 Base	Steady	Good	Same
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Increasing	Good	Lower
Class IV Milk (CME)	Decreasing	Good	Lower



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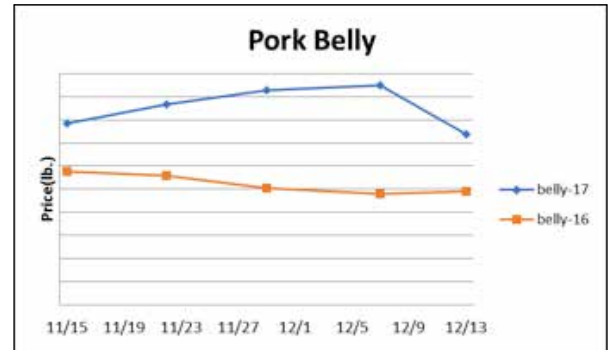
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Pork

Pork output last week rose .3% and was 4.2% bigger than the same week a year ago. Hog slaughter was the largest in just over a year. The available hog supply is expected to build in the near term which could put downward pressure on many of the markets, including bellies. U.S. pork exports in October were 9.7% larger than the previous year and the biggest for the month since 2012. Trade with China was up 1.9% year-on-year and the biggest for the month since 2013. Solid exports could underpin pork prices some in 2018.

Description	Market Trend	Supplies	Price vs. Last Year
Live Hogs	Decreasing	Ample	Higher
Sow	Decreasing	Ample	Higher
Belly (bacon)	Decreasing	Good	Higher
Sparerib(4.25 lb & down)	Decreasing	Good	Higher
Ham (20-23 lb)	Increasing	Good	Lower
Ham (23-27 lb)	Decreasing	Good	Lower
Loin (bone in)	Decreasing	Good	Lower
Babyback Rib (1.75 lb & up)	Decreasing	Good	Lower
Tenderloin (1.25 lb)	Decreasing	Good	Higher
Boston Butt, untrmd (4-8 lb)	Increasing	Good	Higher
Picnic, untrmd	Increasing	Good	Higher
SS Picnic, smoker trm box	Decreasing	Good	Higher
42% Trimmings	Decreasing	Good	Lower
72% Trimmings	Increasing	Good	Higher



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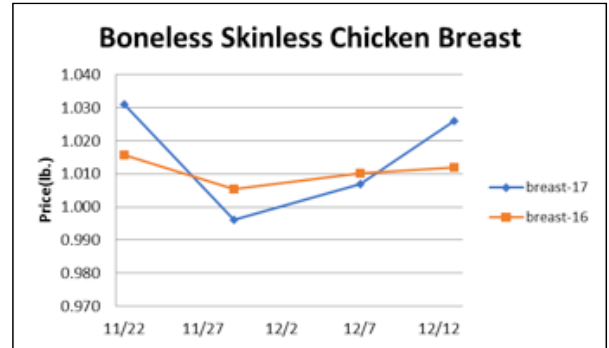
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Poultry

For the week ending December 2nd, chicken production rose 34.9% from the prior holiday shortened week and was 2.2% better than a year ago. Broiler slaughter was the largest since June. The six-week total of chicken output is up just 1.6% from 2016 due to a 2.5% rise in slaughter and a .9% decline in broiler weights. The larger year-over-year slaughter gains have been weighing heavy on wing prices as of late, which recently fell to one-year plus lows. History suggests that higher chicken wing prices are almost a certainty next month. Tempered annual production growth this winter could only intensify any pending chicken wing market increases.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Birds WOG-Nat	Decreasing	Good	Higher
Wings (jumbo cut)	Decreasing	Good	Lower
Wing Index (ARA)	Decreasing	Good	Lower
Breast, Bnless Skinless NE	Increasing	Good	Higher
Breast, Bnless Skinless SE	Increasing	Good	Higher
Breast Boneless Index (ARA)	Increasing	Good	Higher
Tenderloin Index (ARA)	Increasing	Good	Lower
Legs (whole)	Increasing	Good	Higher
Leg Quarter Index (ARA)	Increasing	Good	Higher
Thighs, Bone In	Increasing	Good	Lower
Thighs, Boneless	Increasing	Good	Higher



Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Decreasing	Good	Lower
Turkey Breast, Bnls/Sknls	Increasing	Good	Lower

Eggs

Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Steady	Short	Higher
Medium Eggs (dozen)	Steady	Short	Higher
Liquid Whole Eggs	Steady	Short	Higher
Liquid Egg Whites	Decreasing	Short	Higher
Liquid Egg Yolks	Increasing	Short	Higher
Egg Breaker Stock Central	Steady	Short	Higher



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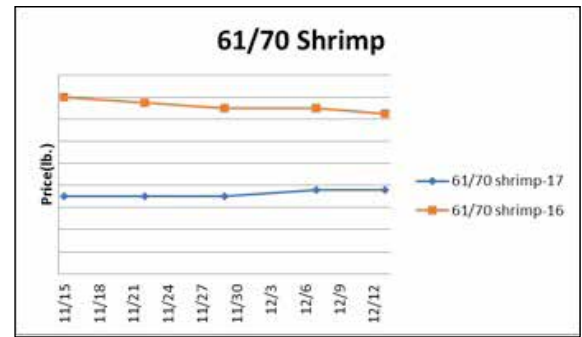
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Seafood

Salmon prices generally continue to track below year ago levels due to solid imports. During October, the U.S. imported 8.5% more salmon than the previous year. However, trade with Canada remains challenged. Whole salmon imports from Canada during the month were down 5.9% year-on-year. This trend may continue to support Canadian salmon prices.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Higher
Shrimp (61/70 frz)	Steady	Good	Lower
Shrimp Tiger (26/30 frz)	Steady	Good	Lower
Snow Crab, frz	Steady	Good	Higher
Tilapia Filet, frz	Steady	Good	Lower
Cod Filet, frz	Steady	Good	Higher
Tuna Yellowfin, frsh	Steady	Good	Higher
Salmon Atlantic Filet, frsh	Steady	Good	Lower
Pollock Filet, Alaska, frz	Steady	Good	Lower



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Paper and Plastic Products

Description	Market Trend	Supplies	Price vs. Last Year
WOOD PULP (PAPER)			
NBSK- Paper napkin	Steady	Good	Higher
42 lb. Linerboard-corrugated box	Increasing	Good	Higher
PLASTIC RESINS (PLASTIC, FOAM)			
PS-CHH-utensils, cups, to-go cont.	Steady	Good	Higher
PP-HIGP-heavy grade utensils	Steady	Good	Higher
PE-LLD-can liners, film, bags	Steady	Good	Higher

Retail Price Change from Prior Month

Description	Nov '17	Oct '17	Sept '17
Beef and Veal	Increasing	Decreasing	Decreasing
Dairy	Decreasing	Increasing	Increasing
Pork	Decreasing	Decreasing	Increasing
Chicken	Decreasing	Increasing	Decreasing
Fresh Fish and Seafood	Increasing	Decreasing	Decreasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Decreasing

Various Markets

Coffee prices have been declining lately due to relatively favorable weather for the 2018 harvest in Brazil and a declining currency there. Assuming the Brazilian currency remains historically low, it will be hard for coffee prices to make a notable upward run.

Description	Market Trend	Supplies	Price vs. Last Year
Whole Peeled, Stand (6/10)	Decreasing	Good	Higher
Tomato Paste-Industrial (lb)	Decreasing	Good	Higher
Coffee lb ICE	Decreasing	Good	Lower
Sugar lb ICE	Increasing	Ample	Lower
Cocoa mt ICE	Decreasing	Short	Lower
Orange Juice lb ICE	Decreasing	Good	Lower
Honey (clover) lb	Steady	Good	Higher



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Produce

The avocado markets have spiked this month due to a slowdown in the harvest in Mexico. U.S. avocado imports from Mexico last week fell 6.1% from the prior week and were 16.7% less than the same week last year. The HASS Avocado Board is projecting the harvests in Mexico to expand steeply during the next few weeks which, if realized, could weigh heavy on the avocado markets. Avocado prices are typically flat to firm during the last few weeks of the year. Tomato prices remain expensive due to the subpar harvest in Florida. Lettuce, romaine and leaf items are steady and are still a good buy. Carrots are improving, and lemons are short in supply.

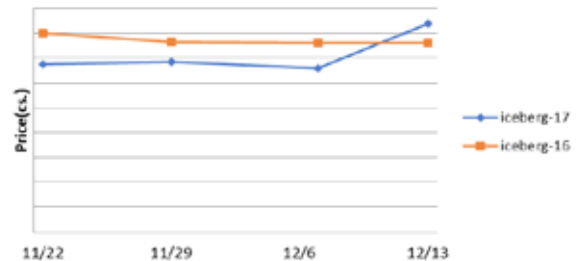
Tomato Weather Update – East, West and Mexico

Extreme - Ruskin/ Palmetto region will be severely short as we are just not seeing plants come on as estimated, in addition to ongoing gaps in production. We are witnessing the situation we have all been aware was coming for some time now. On September 10, 2017, Hurricane Irma devastated several growing districts throughout Florida with winds over 100 miles per hour and catastrophic flooding. This weather event is currently impacting harvest of all vegetable items in the Ruskin/ Palmetto region resulting in extreme yield deficits coming from the fields. In addition to this event in the east, we are seeing major issues with Roma tomato, Grape tomatoes and Round tomatoes out of Central Mexico as cold nights have literally stopped production. We do not anticipate seeing any relief until the week of Christmas.

MARKET ALERT

- Avocados – ESCALATED
- Cauliflower – ESCALATED
- Lemons – EXTREME
- Mushrooms – ESCALATED
- Potatoes – ESCALATED
- Snow & Sugar Snap Peas – ESCALATED
- Tomatoes (Cherry, Grape, Roma, Round) – EXTREME

Iceberg Lettuce (24 count)



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Produce

Apples & Pears

Prices are unchanged. Many Washington growers are shifting from more traditional varieties to newer apples, such as Autumn Glory, Envy, Jazz, Kanzi, Opal, Pacific Rose, and Smitten, with better flavor, longer shelf-life, and crunchier texture. Pear prices are unchanged; supplies are plentiful, especially 100- to 120-count sizes. Bartlett pear stocks are beginning to wind down and will be depleted by late January 2018. Quality is very good: sugar levels range from 12 to 14 Brix.

Artichokes

Steady market with higher prices. Quality is good.

Arugula

Supplies are low for baby and wild. Quality is average. Prices are rising.

Asparagus

Holiday demand is pushing up the market. Quality ranges from very good to excellent: stalks are straight and tender, tips are tight, and flavor is pleasantly grassy.

Avocados

ESCALATED - We are seeing ongoing issues with the supply of avocados crossing the border from Mexico. These issues are the result of continued closures of several packing sheds in the region. These closures are the result of a politically-driven decision made by the board of elected growers in Mexico. Due to the nature of the root cause of these closures, domestic marketing companies have no control over supply and no way to influence the re-opening of these facilities. As a result, we are anticipating a steady increase in FOB prices at the border over the next several weeks, despite the Minister of Agriculture for Mexico stepping in to attempt to resolve these political issues. We don't have any hard information about a timetable for negotiation or resolution of these issues and have been apprised of rumors of organized shutdowns occurring this weekend, which will further tighten supply.

Bananas

Demand remains firm and quality is good, but we are seeing short supplies across the country and expect a shortage to continue through 2018 due to virus impacts.

Green Beans

With some Florida fields experiencing frost, green bean harvests are lighter and will be sporadic over the next few weeks. Mexico's overall volume is down as well, but product is available daily. Quality is varied by grower and lot.

Berries:

Blackberries

The Mexican market is low; stocks are ample. Quality is very good; berries are plump and juicy with sweet, yet tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

Prices have stabilized; Chilean temperatures are rising, aiding volume and improving flavor. Mexican supplies are slowly increasing. Quality is very good: berries have deep blue, firm skins and flesh that tastes mildly sweet.

Raspberries

Prices are slightly higher than last week; supplies are sufficient. Quality is very good: color is deep red and flavor is tangy, yet sweet. Sugar levels range from 13 to 14 Brix.

Strawberries

The market is steady. New crop fruit from Oxnard, California is on the market. Overall quality is good, but ordering for quick turns is recommended.

Bok Choy

Quality is good and we are seeing some higher quotes on WGA cartons.

Broccoli

Good color and occasional brown bead. Brown bead may be an issue for a few weeks. The market is starting to climb. Growers are experiencing planting gaps in many Mexican growing regions; expect limited supplies through December. Domestic quality is best.



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Produce *(continued)*

Brussels Sprouts

Very high prices and tighter supplies remain but are leveling out. Quality is improving. We expect improvement in about 2 to 3 weeks.

Cantaloupe

We are basically finished on the California and Arizona desert fruit for the year and seeing some offshore arrivals here on the west coast, the east coast has better volumes of offshore fruit at this time and we will start seeing better volumes of offshore in the coming weeks. The overall quality of the first off shore looks good with a green to cream cast and very good internal color and descent sugars. We will be in the offshore fruit through April until we start back in the desert around the first of May.

Carrots

Due to the heat and rain, we are seeing some quality issues and a shortage on jumbo supplies as well as tables and cellos. This market is improving, but prices are still higher.

Cauliflower

Prices are rising; expect limited stocks through the month.

Celery

The market is a bit higher than last week despite ample supplies; demand is strong. Quality is very good. The Florida season will begin in a week or two.

Cilantro

Still seeing some burn and occasional decay. Overall getting better.



Corn

Sweet corn supplies are improving out of Florida as new crop production begins.

Cucumbers

Baja will wrap up its cucumber season over the next 7-10 days, but Mainland Mexico farms continue to harvest solid numbers despite the recent cold weather. In the East, Central and South Florida farms have light supply as they near the end of the Winter season and deal with the effects of cold weather. Honduran imports are kicking in with another major grower on tap to start around the 24th.

English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

Eggplant

New Florida acreage has come online, improving the overall supply situation in the East. In the West, more Mexican shippers have started up, adding to the already strong numbers of good-quality fruit available at crossing points.

Fennel

Supplies for the week will be good and quality is good.

Garlic

EXTREME - We have now fully transitioned from common storage garlic to cold storage product. Fortunately to date, our recoveries are faring relatively fine through the cracking/peeling process. Concerning the future/2018 crop, we are 85% completed with our planting season. Provided the weather (and that Mother Nature cooperates), we should finish planting within the next two weeks. In the coming months, we'll hope for cold enough weather and decent rainfall (similar to last year) to help facilitate the growth of the bulbs.

Ginger

Chinese ginger supplies are steady. Quality is good.

Grapes

Market steady as we are still shipping California fruit and will be doing so through December, there is some Peruvian arriving on the east coast and we will see some very light volumes from Chile arriving on the west coast this week and containers will follow butt with light volumes. The first break bulk vessels out of Chile will not be arriving until after the first of the year, so we hope have a smooth transition without any gaps on grapes. The overall quality of the California fruit is good, but this fruit is all storage fruit and on the greens we are repacking some but for the most part fruit is good and

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Produce *(continued)*

eats very well and holding up good. The Chilean crop is of normal volumes and the weather has been good, so we are expecting very nice quality.

Green Cabbage

Supply is good on both coasts, quality is good.

Red Cabbage

Quality and sizing have been great with good color. Market is stable.

Green Onions

Iced Prices are good, quality is good.

Honeydew

We are also finished in the California and Arizona desert, and seeing some light offshore volumes coming in and a few Mexico dewes still crossing. The Mexico volumes will be very light until around April, and will be dependent on offshore through April. The first fruit is a bit green but cuts nice and sugars are descent, we will start to see better volumes in the next few weeks, but right now fruit is on the tighter side. We will also be dependent on the offshore fruit through April, until we start back in the California desert the first of May.

Jicama

Prices are firming up and inventories are lighter. We are seeing some quality and shelf life issues in storage product.

Kale (Green)

Demand is steady and quality has improved. Supplies are steady.



Lemons

Market very strong with excellent demand and some sizes demand exceeds supply. We are harvesting in Dist 3 (desert) and also going in a light way here in dist 1 (Central Valley), we are gassing fruit in both areas and you will see some checkerboard color but for the most part quality is good, just like the oranges we will hope to see better color break here in Dist. 1 as our temperatures cool down which will promote better color break and allow for less gassing hours. We hope to be done gassing on lemons by the first of the year. The overall crop size out of dist 3 is about 20% lighter than last year and here in Dist. 1 about 15% lighter. We expect the market to stay fairly strong with lighter volumes out of both districts, and with domestic and export demand very good.

Lettuce:

Butter

Prices are stable. Quality is good.

Iceberg

Large size, misshapen and ribby, weak tip and tip burn. 1-2 weeks ahead of schedule due to hot temperatures. Starting to see a slight improvement with quality. Peak brand will be hit and miss.

Romaine

Yuma product is 14-16" heavy cupping, seeder, very ribby with heavy mechanical damage. El Centro and Coachella product seems to be better quality. Poor quality expected out of Yuma area for 2-3 weeks. Occasional field that looks good.

Romaine Hearts

Supplies are good and prices have improved. Quality has improved. Most issues with quality can be peeled off. Ribby and seeder are a couple of issues.

Green Leaf

Some fields very ribby and or 12" long. Prices are weak. Quality is very good, although the overall industry is struggling with weak tip and growth crack problems.

Iceberg Blends

Weak tip and seeder are an issue. Probably will not see relief for several weeks.

Chopped Romaine/Romaine Blends

Slightly ribby, seeing some core/seeder.

Arcadian Blend

Seeing some insect damage and occasional burn. Generally good quality. Much better than spring mix.

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Produce *(continued)*

Limes

The market is elevated. Cold weather is diminishing Mexican stocks. Labor is also tight due to the holiday season.

Napa

Supplies are normal. Quality is good.

Onions

Despite strong demand, prices are stable. Available supplies are dominated by medium and jumbo sizes; colossals and super colossals will remain limited through the storage crop season.

Oranges

Market is very strong with excellent demand across the board. We are in full swing on our California navels and the overall quality is looking good with sugars are still around 11-13 and acid levels are minimal, so fruit is eating good. We are still gassing fruit 1-3 days to bring on color so you will see some checkerboard color with slight green and some spotting which is all due to gassing, but color is getting better every day as we have been 28-30 degrees the last 10 nights. We are experiencing some colder temperatures but not a hard freeze so the colder temperatures are helping to bring on color and firm up the fruit. With the cooler temperatures and the fluctuation of day to night temperatures we will see the better color each week and hopefully we should be finished gassing by Christmas. The weather has been very dry as ell and the forecast is for rain to hopefully start the 23rd of December and the weather pattern will hopefully switch to wet weather as we need all we can get . The overall crop is about 15-20% lighter than normal, therefore smaller fruit will become very tight by the first of the year and it will be a battle through the year on 88's and smaller as most blocks right now are peaking on 72's followed by 88's. We will keep you posted going forward.

Parsley (Curly, Italian)

Prices are stable and quality has improved. Steady supply.

Bell Peppers

Although Florida's bell pepper supply is not abundant, it is improving. Numbers have been steady but may see a temporary reduction as farms work through the holiday week(s) and wait for warmer temperatures to return. Quality is nice and volumes are expected to increase over the next few weeks. In the West, Mexico is now going strong and has more growing areas starting this week and next. Quality is excellent thus far, with good color, strong walls, and nice shape.

Chili Peppers

Sonora and Sinaloa continue peak-season production of chili peppers. All varieties except poblano and habanero are available in promotable volumes. These peppers are shorter in supply this year due to less acreage planted by growers. Quality is excellent at this time, with good size, color and heat levels. Florida's chili production has shifted from Plant City to South Florida, where a few growers have gotten started with light production.

Red & Yellow Bell Pepper

Prices are inching down; supplies are becoming more plentiful in Florida and Mexico. Quality is very good: skins are smooth, color is vibrant, and flavor is sweet, yet spicy.

Pineapple

The market is weak; supplies are ample. Quality is good: fruit is juicy and tangy, yet sweet. Sugar levels vary from 13 to 16 Brix.

Idaho Potatoes

Cold temperatures is the topic of conversation this week. Shippers can't haul product from the cellars to the shed when temps drop below 20°. The product gets too cold and can either freezes or suffers bruising when the potatoes are unloaded. This is causing some shipment delays. Trucks are also effecting the fob market. As freight rates climb and trucks become less and less available shippers are trying to entice those with trucks with a little better fob price. Any market activity right now will be a result of one of these factors, the overall supply in Idaho has not changed.



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Produce *(continued)*

Radishes

Quality is good and supply is slowing down. Expect to see stronger markets through the summer.

Snow and Sugar Snap Peas

ESCALATED - Snow and sugar snap peas are in high demand and markets are extremely tight.

Spinach (Baby)

Baby and clipped spinach supplies are good, showing average quality.

Spinach (Bunched):

Large size. Large amount of yellow leaves. Brittle texture causing mechanical damage.

Spring Mix

The market is level; stocks are adequate in Yuma. Quality is average: mildew is affecting a small percentage of red leaf and red oak. Early breakdown is a minor issue. Seeing some burn and dehydration quality is day to day with very little in Peak.

Squash

Cold weather has affected squash production in both Florida and Mexico. Availability has snugged up this week, especially on good-quality yellow squash. Look for supply to rebound after the holiday as temperatures warm and plant growth catches up.

Tomatoes

With Ruskin finishing up and Immokalee-area farms just getting off the ground, the tomato category is coming up critically short this week in the East. South Florida's production will increase over the next 10-14 days as more growers begin harvests and post-hurricane re-plantings come to maturity. However, the supply pipeline is completely depleted and won't return to "normal" levels until the first few weeks of January. On a positive note, Immokalee's earliest fruit looks to have nice quality and sizing.

Eastern Mexico, where yields have already been low, recently experienced a cold weather event, which damaged tomato crops and significantly limited production. This has shifted the focus to Baja where growers are into the seasonal decline. Supply is slowly beginning to transition from these areas to Culiacan, where just a trickle of volume will start this week. Look for Culiacan's volume to gradually build until mid-January when supply levels should resume some sense of normalcy.

Watermelons

The market is elevated; low temperatures have slowed growth and reduced volume. Quality is good: sugar levels range from 10 to 11 Brix.

