



# MARKET TRENDS

FOR WEEK ENDING DECEMBER 29, 2017

 **PERFORMANCE**  
FOODSERVICE



# MARKET TRENDS

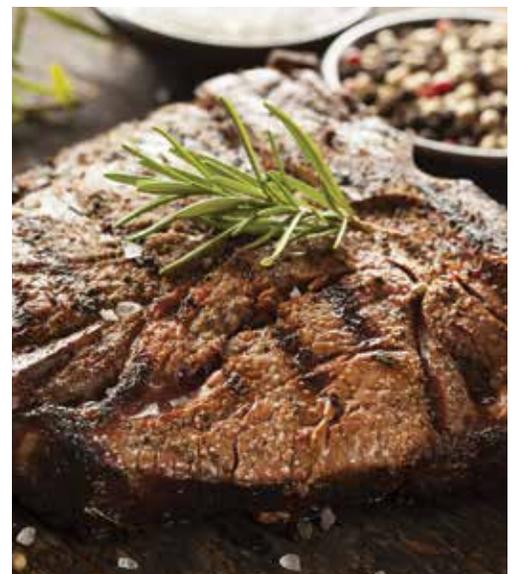
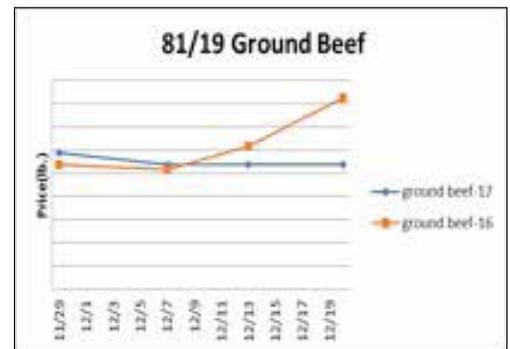
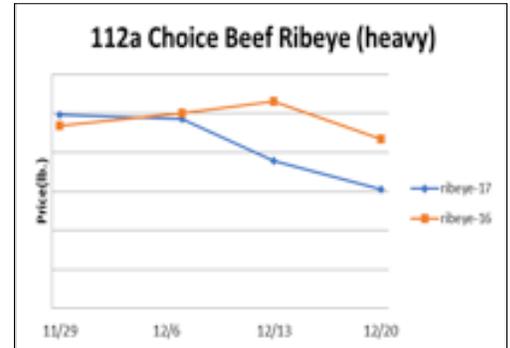
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## Beef, Veal & Lamb

Beef output last week declined .7% but was 3.4% better than the same week last year. Slaughter ready cattle supplies are expected to seasonally decline during the next several weeks. The USDA is forecasting Q1 beef production to be 2.1% bigger than this year but the smallest for any quarter for 2018. Forward beef sales for delivery 22-90 days out rose to a three-week high and were heavily focused on end cuts like briskets. We note that brisket, rounds and ground beef are pricing in the forward market flat to slightly above the existing price levels. Stronger end cut beef price appreciation is anticipated during January. Ground beef prices could be firm as well.

Description	Market Trend	Supplies	Price vs. Last Year
Live Cattle (Steer)	Increasing	Short	Higher
Feeder Cattle Index (CME)	Decreasing	Short	Higher
Ground Beef 81/19	Steady	Good	Lower
Ground Chuck	Increasing	Good	Lower
109 Export Rib (ch)	Decreasing	Good	Higher
109 Export Rib (pr)	Decreasing	Good	Higher
112a Ribeye (ch)	Decreasing	Good	Lower
112a Ribeye (pr)	Increasing	Good	Higher
114a Chuck , Shlder Cld(ch)	Increasing	Good	Lower
116 Chuck (sel)	Increasing	Good	Higher
116 Chuck (ch)	Increasing	Good	Higher
116b Chuck Tender (ch)	Increasing	Good	Higher
120 Brisket (ch)	Increasing	Good	Lower
120a Brisket (ch)	Increasing	Good	Higher
121c Outside Skirt (ch/sel)	Increasing	Good	Higher
121d Inside Skirt (ch/sel)	Decreasing	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	Lower
171b Outside Round (ch)	Increasing	Good	Higher
174 Short Loin (ch Ox1)	Increasing	Good	Higher
174 Short Loin (pr 2x3)	Decreasing	Good	Lower
180 Ox1 Strip (ch)	Increasing	Good	Lower
180 Ox1 Strip (pr)	Decreasing	Good	Higher
184 Top Butt, boneless (ch)	Increasing	Good	Higher
184 Top Butt, boneless (pr)	Decreasing	Good	Higher
184-3 Top Butt, bnls (ch)	Increasing	Good	Higher
185a Sirloin Flap (ch)	Decreasing	Good	Higher
185c Loin, Tri-Tip (ch)	Decreasing	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)	Decreasing	Good	Higher
50% Trimmings	Increasing	Good	Higher
65% Trimmings	Decreasing	Good	Higher
75% Trimmings	Steady	Good	Higher
85% Trimmings	Increasing	Short	Higher
90% Trimmings	Increasing	Short	Higher
90% Imported Beef (frz)	Decreasing	Good	Higher
95% Imported Beef (frz)	Decreasing	Good	Higher
Veal Rack (Hotel 7 rib)	Steady	Good	Higher
Veal Top Round (cap off)	Steady	Good	Higher



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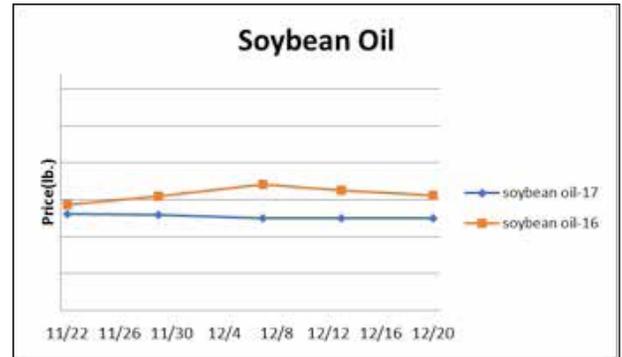
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## Grains

Frigid weather is forecasted for the heart of the winter wheat belt next week. This, along with already dry weather, is mildly concerning for the domestic winter wheat crop. That said, the weather during the next few months will be much more important to the crop. Wheat prices could be erratic this winter.

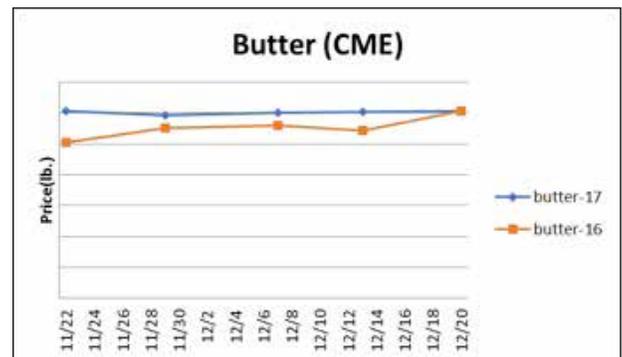
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Steady	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher
Distillers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



## Dairy

U.S. milk output growth remains lackluster. During November, milk production was 1.1% larger than the previous year due to a .6% bigger milk cow herd and just a .5% gain in milk per cow yields. The milk cow herd was unchanged from the previous month. Dairy farmer margins have deteriorated, and milk futures suggests margins may remain challenged throughout the first several months of 2018. This should continue to temper milk output expansion. Cheese and butter prices are beginning to seasonally decline. History suggests even lower butter prices are likely in January.

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



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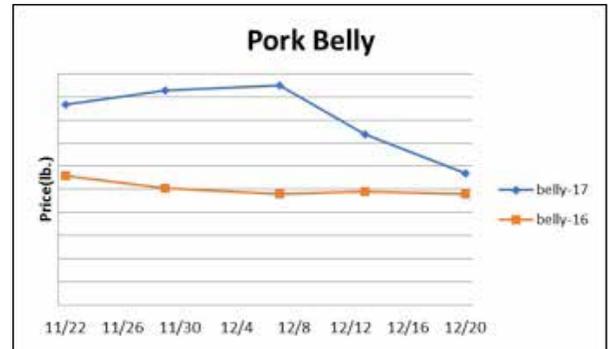
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## Pork

Pork production rose 1.9% last week and was 4.3% larger than the same week a year ago. Hog slaughter was a record for any week. Hog weights have been heavy as well which suggests that near slaughter ready hog supplies are at least sufficient. For the week ending December 2nd, dressed hog weights were the heaviest since the spring of 2015. This could keep downward pressure on wholesale pork prices in the near term. Retail bacon prices in November fell 5.9% to a five-month low. Wholesale belly prices could bottom soon.

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



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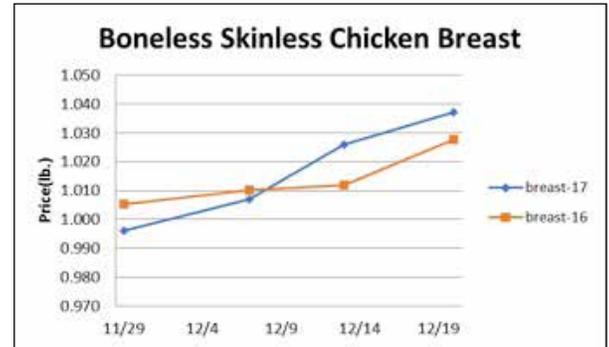
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## Poultry

Chicken output for the week ending December 9th declined 1.8% but was 4.3% larger than the same week last year. The six-week total of chicken production was 2.1% better than 2016 due to a 2.3% rise in broiler slaughter and .2% lighter bird weights. Chicken producer margins remain historically solid and some of the best for this time of the year in the last decade. That said, hatchery issues continue, and new plants won't mostly be available until 2019. This could limit chicken output growth during the next several months. Chicken breast and tender prices are beginning to find support with further market increases anticipated during the winter.

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



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



## Eggs

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

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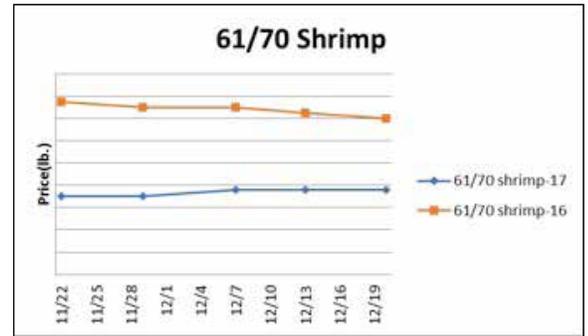
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## Seafood

Snow crab prices continue to track well above the previous year due to tight world supplies. U.S. imports of snow crab during October were 7.4% bigger than last year but the smallest since February. Further, it is taking much higher price levels to obtain imports. The low Alaskan quota is likely to cause snow crab supplies to remain limited deep into next year.

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
<b>WOOD PULP (PAPER)</b>			
NBSK- Paper napkin	Steady	Good	Higher
42 lb. Linerboard-corrugated box	Steady	Good	Higher
<b>PLASTIC RESINS (PLASTIC, FOAM)</b>			
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

Cocoa continues to be priced at relatively engaging levels due in a large part to expectations of large harvests in West Africa. Cocoa hasn't priced significantly below the existing levels for an extended period of time in over a decade which suggests the downside risk is minimal.

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



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## Produce

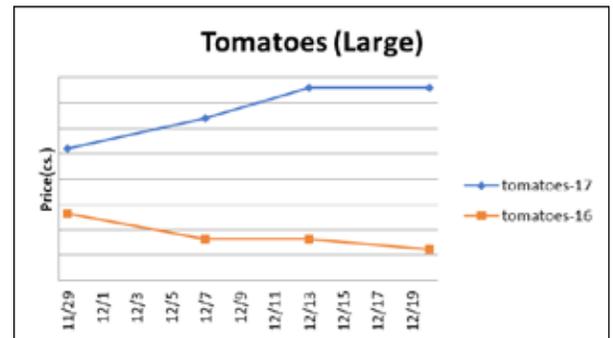
The tomato markets remain elevated, rising 138% during the last six weeks, matching their most expensive level of the last decade. The Florida tomato harvest continues to struggle due to damage from Hurricane Irma during the late summer. Tomato shipments from Florida did marginally improve last week but were still 59% less than the previous year. Tomato supplies could improve as the winter progresses which eventually should put downward pressure on prices. The avocado markets could remain historically elevated in 2018. Lettuce, romaine and leaf items are steady and are still a good buy. Lemons and smaller size oranges 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 after Christmas.

## MARKET ALERT

- **Avocados – ESCALATED**
- **Cauliflower – ESCALATED**
- **Green Onions – ESCALATED**
- **Lemons – EXTREME**
- **Mushrooms – ESCALATED**
- **Oranges (Small Sizes) – EXTREME**
- **Snow & Sugar Snap Peas – ESCALATED**
- **Tomatoes (Cherries, Grapes, Romas & Rounds) – EXTREME**



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## Produce

### Apples & Pears

The market is steady. Many Washington growers are moving 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. Pacific Rose apples, a cross between the Gala and Splendour, are crisp and sweet. The Pear market is level; stocks are ample, especially 100- to 120-count sizes. Bartlett pear supplies are winding down and will be depleted by late January. 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 to poor.

### Asparagus

Prices are elevated. Quality ranges from very good to excellent: stalks are straight and tender, tips are tight, and flavor is pleasantly grassy.

### Avocados

The market is climbing; Mexican volume has fallen, especially for 60-count and smaller sizes. Quality ranges from good to very good: oil content is high, creating creamy texture and nutty flavor.

### 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.

### Beans

East: Beans have snapped back into a very tight situation due to the frost causing trouble in the crop. Volume will be sporadic through the remainder of 2017. FOBs took a large jump up.

West: Due mostly to cooler weather, MX supply is at less than favorable volumes. FOBs are up a few dollars. Quality can be questionable.

### Berries:

#### Blackberries

Mexican prices are weak; supplies are plentiful. Quality is very good; berries are plump and juicy with sweet, yet tangy flavor. Sugar levels range from 12 to 13 Brix.

### Blueberries

The market ranges from low to stable. Chilean stocks are sufficient; Mexican supplies are becoming more abundant. Quality is very good: berries have deep blue, firm skins and flesh that tastes mildly sweet.

### Raspberries

The market is a bit higher than last week. California production is slowing, but Mexican 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

California prices are up; fruit is limited due to cold weather as well as harvesting transitions. Stocks are ample in Mexico. Overall quality is good, but ordering for quick turns is recommended. There are a few Florida shippers packing as well.

### Bok Choy

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

### Broccoli

Prices are elevated. Growers are experiencing planting gaps in many Mexican growing regions; expect tight stocks through this month. California quality is best: heads are deep green and compact with earthy flavor.



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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

The market is up; volume will remain low through the month. Cool nights have slowed the growth, and supplies industry wide are very short.

### Celery

Prices are steady. Quality is very good. The Florida season will start in January.

### Cilantro

Quality and prices are good with steady supply.



### Corn

Sweet corn supplies are very good out of South Florida.

### Cucumbers

East: Supplies are dwindling down as more FL growers start to wind down their winter crop. Honduras imports are starting to channel in with more volume expected to come on board the middle of next week. Prices have perked up a few dollars during this short gap period. Quality is good.

West: Baja's season is almost done, but mainland MX is pushing good solid numbers out. The crop was not affected by the frost as much as other categories. Quality is mostly good but is seeing some issues with shelf life. Prices are fairly steady but expected to move up a few dollars once Baja is completely done.

### English Cucumber

There are excellent supplies crossing through Nogales and McAllen.

### Eggplant

East: FL has excellent supply & quality. Prices are cheap and steady week over week.

West: MX has excellent supply & quality. Prices are cheap and steady week over week.

### 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

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## Produce (continued)

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 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

ESCALATED - Iced: We are seeing a shortage in supply due to demand of the holiday pull. Expect higher prices.

### 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 is average. Supplies are steady.



### Kiwi

California crops are now in full swing with ample supply available and showing excellent quality. This new crop will extend all the way through to February.

### 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.

#### Green/Red Leaf

The market is low. Quality is very good despite weak tip and growth crack problems throughout the industry.

#### Iceberg

Prices remain near the bottom. Fluctuating temperatures, strong winds, and lettuce ice have caused quality concerns that have significantly dropped palletized iceberg lettuce weights. Quality is average as we are seeing bottom rot and weak tip.

#### Romaine

The market remains low; despite industry problems with weak tip, growth cracking, heavy rib and some twisting overall stocks are plentiful. Quality is overall fair, but improving. Crops have come up short, so we may see shorter supply within the next few weeks.

#### Romaine Hearts

Supplies are good and prices have improved. Quality has improved. Most issues with quality can be peeled off. Crops are coming up short, so we may see a shorter supply in a few weeks.

#### Limes

Prices are high. Cold weather is diminishing Mexican stocks. Although holiday demand is subsiding, tight labor remains an issue. Quality is good: light color and scarring are minor problems.

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## Produce (continued)

### Napa

Supplies are normal. Quality is good.

### Onions

All indications are showing that supplies are significantly shorter than previous seasons. It is likely that we will see pricing remain elevated as demand exceeds supplies. Sizing is peaking mostly on mediums and jumbos with fewer big onions, but size overall has become better. Transportation in this region has been the largest factor keeping pricing where it is as trucks have been extremely tight.

### 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. Many shippers are struggling on the 113's and 138's and it will be a continued struggle as this is a light crop and if we start to get rain that is only going to make it tougher to get small fruit. We are also forecasted for some real cold next 2 nights (Forecast 23-27 degrees)—we will keep you posted as to any damage. 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.

### Parsley (Curly, Italian)

Prices are stable and quality is average. Steady supply.

### Green Bell Pepper

East: South & Central FL supply is improving, but not yet abundant to meet all needs. A frost crossed the area which resulting in yet again, another delay in product growth. Despite this, prices are just slightly down. Look for larger relief after the holidays as warmer temps settle back into the area. Quality is good.

West: MX is seeing good volume and strong sizes as production increases. Prices are slowing easing downward as more growers come on board. Quality is excellent.

### Jalapeño Pepper

East: Prices remain steady as the crop shifts down to South FL where growers are just tapping fields. Quality is good.

West: Sonora & Sinaloa are in their peak production time with great quality and heat levels. Prices remain low.

### Red Bell Pepper & Yellow Bell Pepper

Prices are up. The Coachella, California season has ended; Mexican supplies are just ramping up. Cold weather has reduced stocks in Florida. Quality is average: discoloration, odd shape, and occasional scarring are slight issues.

### Pineapples

Prices are low; volume is high. Quality is good: fruit is juicy and tangy, yet sweet. Sugar levels vary from 13 to 16 Brix

### Idaho Potatoes

Prices may inch up this week. Recent cold weather may affect the number of finished potatoes packed and delay loading times. If low temperatures persist for more than a few days, packing hours will be reduced as growers become limited to on-site storage supplies.

### Radishes

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

### Salad Blends

Prices are level; harvesting will continue in Yuma, Arizona through the winter season. Iceberg and romaine quality is good: core material/seeder and internal burn incidences are being monitored closely by inspectors.

### Snow and Sugar Snap Peas

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

### Spinach (Bunched)

Supply is good and quality is just fair due to the ice and heat.

### Spinach (Baby)

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



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## Produce *(continued)*

### Spring Mix

Prices are unchanged; supplies are sufficient in Yuma. Quality is good: mildew is affecting a small percentage of red leaf and red oak. Early breakdown is also an occasional problem.

### Yellow Squash / Zucchini

East: The recent frost tightened supplies suddenly with prices moving upward a few dollars. Quality has been affected, mostly on yellow squash. Relief is expected after the holidays once warmer weather settles in and boosts plant growth.

West: With cooler temperatures passing through the area, production has slowed drastically. Prices are up a few dollars. Quality is good. Relief is expected after the holidays once warmer weather settles in and boosts plant growth.

### Tomatoes

#### East

#### Rounds

Ruskin is wrapping up the last of their alright limited crop. Meanwhile, our Immokalee area farms are finally getting off the ground. South Florida's crop will continue to increase over the next 14 days as more growers get into their fields and post-Irma crops come into maturity. Bear in mind that the pipeline is dry and it will take some time to fill inventory levels back to par. Expect the market to take a turn around the first or second week of January, depending on demand. FOBs are steady at higher than usual prices moving into next week and are expected to remain that way for the remainder of 2017. On the bright side, quality and sizing is excellent!

#### Romas

In a very similar update to the rounds, romas will continue to be scarce for the next 14 days as our post- Irma Immokalee crops begin. FOBs remain steady and are expected to stay this way through the remainder of 2017. As the dry pipeline fills, prices and supply will loosen in early 2018. Quality and sizing is looking excellent so far.

#### Grapes

Grapes have been on a roller coaster ride the last few weeks. We saw a brief dip in FOBs as supply improved, however, they rebounded due to the post-Irma supply gap. FOBs remain steady moving into next week, but are expected to fall about a week before rounds. Look for relief around the end of December. Quality is shaping up to be good so far, even though supply is still limited.

#### Cherries

Although supply is still somewhat limited, demand remains low keeping FOBs at a steady price point. Quality is good.

### West/Mexico

#### Rounds

Eastern MX experienced an unexpected freeze and heavy snowfall which forced demand to move to Baja. With an already dwindling supply from season decline in the area, this pushed FOBs up to an abnormally high price. Moving into next week, supply on smaller size fruit is loosening up a bit while big fruit still remains very tight. Culiacan hardly scratching the surface right now. Supplies will strengthen each passing week and reach normal levels around the 2nd week of January from the region. Until then, expect a tighter than usual market. Pricing for next week is steady and quality is mostly good with some softer fruit presenting itself.

#### Romas

The unexpected freeze in Eastern MX forced demand to move to the Baja region which is in its seasonal decline. Culiacan is hardly scratching the surface, but is providing enough to keep pricing steady moving into next week. Supplies will continue to improve with each passing week and be to normal levels in mid-January. Quality is mostly good but some softer fruit can be found.

#### Grapes

Prices are just slightly down as supply picks up. Quality has been good from all western markets.

#### Cherries

Supply is still fairly limited, but improving. However, demand is a little heavier which is resulting in steady pricing. Look for relief in the next 10 days as more volume builds. Quality is good.

#### Watermelons

Tight stocks are driving up prices; cold weather has slowed growth and reduced stocks. Quality is average: sugar levels range from 10 to 11 Brix.