



MARKET TRENDS

FOR WEEK ENDING DECEMBER 14, 2018



MARKET TRENDS

DECEMBER 14, 2018

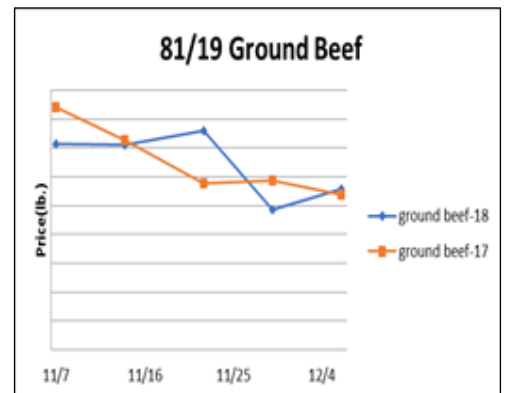
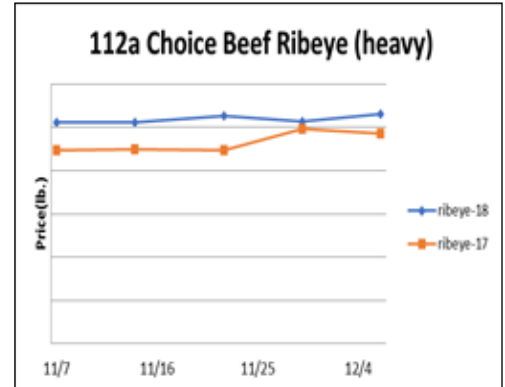
PERFORMANCE
FOODSERVICE



Beef, Veal & Lamb

Following a modest revision downward, last week's cattle slaughter was estimated at 640k head, posting the third time in the last five weeks that output was below a year ago. Packers are expected to boost beef production in the coming weeks to meet contracted beef sales for holiday deliveries. The USDA boxed-beef cutouts are expected to peak soon and fade into late-December. Still, the end cuts are anticipated to garner support next month and should provide support for the boxed beef cutouts in Q1. Lighter year-over-year carcass weights remain a big concern in relation to the earlier seasonal expectations. Expect lighter cattle to support the 50% beef trim markets into 2019, if not longer.

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



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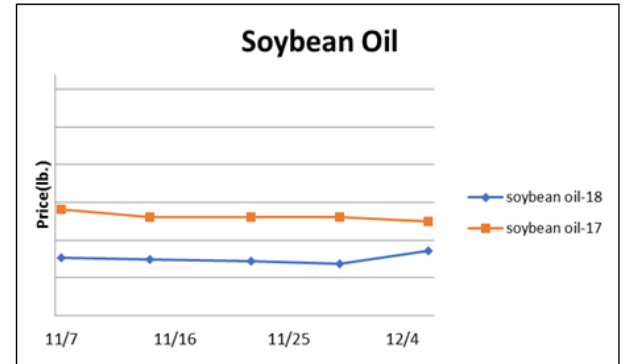
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Grains

The U.S. and China have agreed to a trade war cease fire which will continue for at least the next 90 days. As part of the agreement, China is supposed to start importing notable volumes of U.S. agricultural goods including soybeans. But ample U.S. soybean supplies could temper the upside in prices.

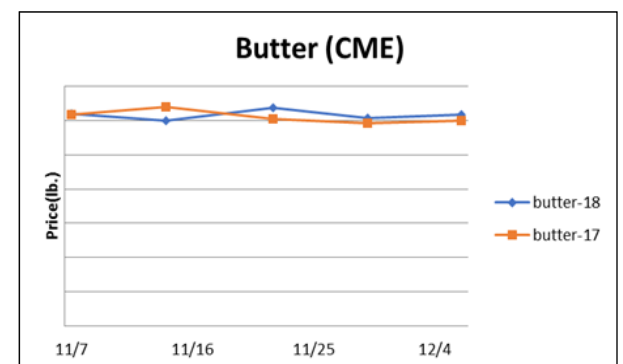
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Increasing	Good	Lower
Crude Soybean Oil, lb	Increasing	Good	Lower
Soybean Meal, ton	Increasing	Good	Lower
Corn, bushel	Increasing	Good	Higher
Crude Corn Oil, lb	Decreasing	Good	Lower
High Fructose Corn Syrup	Increasing	Good	Higher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



Dairy

The CME cheese markets remain relatively depressed due in part to solid production and historically large stocks. October 31st U.S. cheese holdings were up 8.3% from the prior year and a record for the month. It was the smallest October draw-down since 2015. Further cheese price losses are likely in the near term but may be tempered due to solid exports. October butter holdings were 5.9% larger than 2017 but the drawdown during the month was the best since 1993. Over the last five years, the average move for spot butter prices during the next three weeks was down 11.1%.

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



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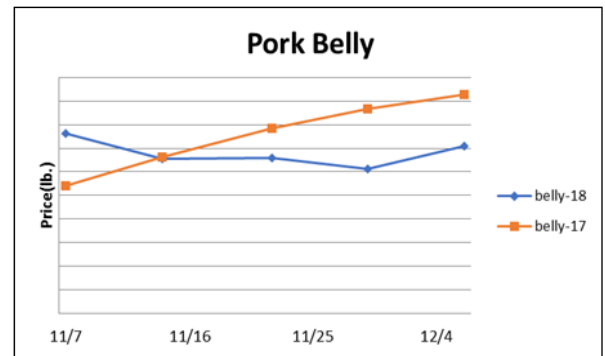
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Pork

Year-over-year increases on total pork production eased last week, as flat slaughter and lighter carcass weights pressured output 1% below 2017. The lighter pork production and additional post-Thanksgiving holiday demand tipped the USDA wholesale cutout higher. Pork bellies and even languishing ham prices found modest support. After declining sharply from the counter-seasonal late summer surge, 42% pork trim prices firmed in late-November. Future trade is an unknown but bullish sentiment has surfaced surrounding China for 2019.

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



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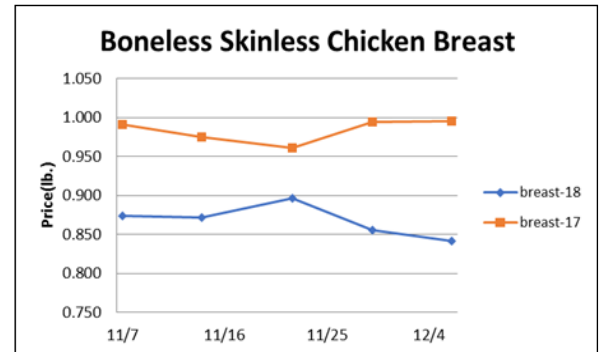
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Poultry

Chicken production for the holiday week ending November 24th was down 22% from the prior week and 1.1% lower vs. the year prior. Not much has changed regarding producer margins and chick placements, as larger chicken production, coupled with increasing supplies of competing meats, continues to put downward pressure on the various chicken markets. Reductions in chick placements are expected to temper total chicken production in early 2019 and could foster price support. However, in the interim, lower chicken prices remain attractive opportunities for buyers heading into next year. Yet, recent history suggests that the chicken markets can still fade in the near term.

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



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

Eggs

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



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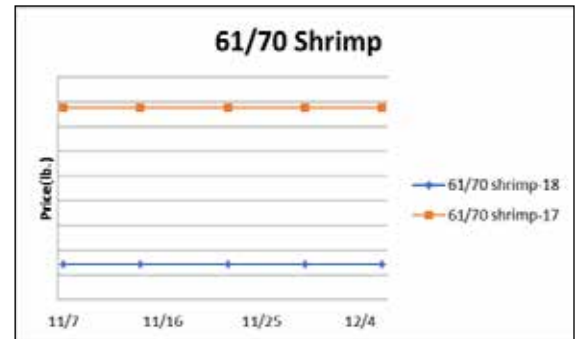
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Seafood

The snow crab leg markets remains elevated. However, the high prices appear to be slowing feature activity and thus overall demand. The Alaskan Bering Sea snow crab harvest remains minimal with the bulk of the quota expected to be landed after the holidays. The quota this year is 50% larger than 2017-18 but is not near enough to normalize the overall supply.

Description	Market Trend	Supplies	Price vs. Last Year
Shrimp (16/20 frz)	Steady	Good	Lower
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	Higher
Pollock Filet, Alaska, frz	Steady	Good	Higher



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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	Lower
PP-HIGP-heavy grade utensils	Decreasing	Good	Higher
PE-LLD-can liners, film, bags	Decreasing	Good	Lower

Retail Price Change from Prior Month

Description	Oct-18	Sep-18	Aug-18
Beef and Veal	Decreasing	Decreasing	Decreasing
Dairy	Decreasing	Increasing	Increasing
Pork	Decreasing	Decreasing	Increasing
Chicken	Increasing	Decreasing	Decreasing
Fresh Fish and Seafood	Decreasing	Decreasing	Increasing
Fresh Fruits and Vegetables	Decreasing	Increasing	Decreasing

Various Markets

The canned tomato markets have firmed as of late as the harvest season has culminated. The overall tomato for processing supply is projected to be down modestly year-on-year through the summer. This could underpin the canned tomato markets over the next several months.

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



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Produce

Market Overview

Market disruptions from the CDC Romaine advisory along with the winter growing season experiencing cooler than normal temperatures have caused many items to be in very EXTREME markets. Broccoli, kale, iceberg, green leaf, spring mix, arugula, and spinach crops have slowed down with higher demand. The fields are experiencing lower yields, lighter weights, and poor quality. Overall available volumes/yields are expected to be lower over the next couple of weeks with anticipated higher prices. Strawberries are EXTREME.

WATCH LIST

- Cantaloupes
- Mixed Chili Pepper (Jalapeno, Anaheim, Poblano, Serrano)
- Sweet Potatoes and Yams

Apples & Pears

There are great supplies of all apple varieties out of Washington, New York, California, Pennsylvania, Michigan. Quality is at its best. Pears- New crop Bartlett pears have started with good supply available especially on the larger (70's to 100's) sizes. New crops of Bosc and D 'Anjou pears are also now available.

Artichokes

Quality is excellent, and demand is good.

Arugula

EXTREME Quality is fair due to cold weather preventing the product from sizing up.

Asparagus

High prices persist. Supplies are limited in both growing regions. Mexican quality is good: spears are deep green and tips are compact.

Avocados

Markets are weak. Mexico was able to quickly fill the pipeline and then some. Growers need to get fruit off of the trees. Demand should start to pick up again now that supplies are back to normal and operations are back to normal with conditioned fruit. There is more #2 fruit available on the markets than before the stoppage.

Bananas

Banana quality has come back in line with expected quality for this time of year. Supplies are good and should remain steady for the remainder of the year.

MARKET ALERT

- **Arugula - EXTREME**
- **Broccoli - EXTREME**
- **Brussel Sprouts - ESCALATED**
- **Cauliflower- EXTREME**
- **Celery - EXTREME**
- **Kale - ESCALATED**
- **Lettuce (Iceberg, Butter, Green and Red Leaf) - EXTREME**
- **Lettuce (Romaine) - ESCALATED**
- **Mushrooms - ESCALATED**
- **Red Cabbage - ESCALATED**
- **Red Peppers - ESCALATED**
- **Spinach (Baby & Clip) - EXTREME**
- **Spring Mix - EXTREME**
- **Strawberries - EXTREME**
- **Tomatoes (Rounds and Romas) - ESCALATED**



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Produce (continued)

Beans

EAST: As quickly as the bean market fell, look for things to get a little snug as cooler weather moves in. FOBs are up a few dollars, but quality still is excellent.

WEST: Mainland MX is seeing a bit more supply which is loosening up FOBs. Prices fall a few dollars week over week, however, there is still not an abundance of supply. We expect FOBs to stay fairly firm through Christmas.

Berries:

Blackberries

Prices are stable; Mexican supplies are ample. Quality is very good: berries are plump and juicy with sweet, slightly tangy flavor. Sugar levels range from 12 to 13 Brix.

Blueberries

The market is level. Mexican and South American volume is average. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

Raspberries

The market has risen; expect limited stocks through this week. Quality is very good: sugar levels range from 13 to 14 Brix.

Strawberries

The market remains high. Rain continues to damage berries and reduce volume. Shortened shelf-life will be a concern for at least another week. Quality is average: bleeding and bruising are problems.

Bok Choy

Quality is average, and demand is fair.

Broccoli

Prices are high. Cold weather and strong processor demand have tightened stocks. Hollow core and pin rot are industry-wide issues.

Brussels Sprouts

ESCALATED Brussels sprout supplies are low and prices are higher.

Cantaloupe

The market has stabilized. Mexican and offshore supplies are increasing. Quality is fair; sugar levels are low but will inch up as the season progresses.

Carrots

We are seeing both good quality and volume.

Cauliflower

High prices persist; stocks are tight. Quality is fair: discoloration and uneven size are issues.

Celery

The market will remain elevated through the New Year. Yields are low due to a disease called Fusarium; pith and growth cracking are also issues.

Cilantro

Supplies are fair, and quality is improving.

Corn

Florida corn is getting better with the transition.

Cucumbers

EAST: Central & South FL still have reasonable numbers, but they are beginning their seasonal decline. Honduras is expected to pick up the pace around mid- December. Until then, FOBs are up slightly with good quality available.
WEST: Despite Mainland MX having good numbers and Baja still trickling out a few loads, things are tightening up in the west due to cool weather with shady skies. This weather slows the growth cycle, thus hindering supply. FOBs are up slightly with good to excellent quality available.



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Produce (continued)

Eggplant

EAST: Supply is plentiful from multiple areas in FL such as Plant City, Homestead & Estero. FOBs are weak with excellent quality available.

WEST: No shortage of eggs in the west. FOBs are weak with excellent quality available.

English Cucumbers

Good supplies are now available from Spain and Holland eliminating pro-rates as well as showing decreases in the market. We should continue to see improvements; new crop from Mexico is ramping up daily and quality is very nice.

Fennel

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

Garlic

The market is about 50% done with the 2017 crop. Supplies are steady and prices remain high on domestic product.

Ginger

Chinese ginger markets are mixed, but quality is good. Also, product is available at higher costs from Brazil, Costa Rica and Honduras and Peru with no major quality issues being reported.

Grapes

The market is stable. Supplies will ship from storage through late December/early January. Green seedless sugar levels range from 17 to 18 Brix; portion-packed sugars vary from 18 to 20 Brix.

Green Cabbage

Supplies are improving and priced are trending downward.

Red Cabbage

ESCALATED Supplies are lower than normal and prices are rising

Green Onions

Supply and quality are good, and demand is fair. Iceless: Similar to iced, supply and quality are both good, and demand is fair.

Honeydew

The market is stable. Mexican and offshore harvesting is underway; supplies are sufficient. Quality is average.

Jicama

Markets remain firm due to ongoing short supplies and will continue to see some quality and shelf life issues.

Kale (green)

ESCALATED Quality is fair due to cold weather preventing the product from sizing up.

Lemons

The market is unchanged; domestic supplies are ample. Quality is very good: fruit is juicy, and flavor is tart.

Lettuce:

Butter

EXTREME Quality is fair with limited supplies.

Green Leaf

EXTREME Quality is good with limited supplies. Product is small, due to cold weather.



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Produce *(continued)*

Red Leaf

EXTREME Supplies are tight, demand is good, and quality is fair.

Iceberg Lettuce

EXTREME Supplies continue to be lower than normal due to cold weather. We have been experiencing some frost in some areas and we expect to see more the remainder of this week with the addition of some rain. However, quality on product is good.

Romaine

ESCALATED Quality and supplies are both fair, but demand is good.

Romaine Hearts

ESCALATED Supplies are lighter than normal, and quality is fair, but demand is good.

Limes

Prices remain low. Stocks are abundant; all sizes are readily available. Quality is good: scarring is minimal.

Napa

Demand, supply, and quality are all good.

Onions

The market is weak; stocks are adequate. Planting is complete for the upcoming Texas season. Onions from Mexico will enter the market in early February. Storage quality is excellent.

Oranges

Prices are low; California Navel supplies are average. The crop is dominated by 113-count and smaller sizes. Sugar levels vary from 11 to 12 Brix but are starting to rise. Oranges from Florida and Texas are also on the market.

Parsley(Curly, Italian)

Quality is fair, due to cold weather preventing the product from sizing up.

Green Bell Pepper

EAST: Supply continues to be light, but markets are starting to ever so slightly loosen up. South Florida is still building their season, so a bit more supply is expected soon which will bring more relief. Quality is variable field to field.

WEST: The CA desert is in their seasonal decline with only about 2 weeks left. MX is just getting started with decent volume, but things are not bright in the future. Supply is down due to bad weather in October with some growers delayed up to 3 weeks due to having to replant. Despite all of this, FOBs are down slightly into next week. Quality is mostly good but can vary especially on CA old crop.



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Produce *(continued)*

Jalapeños (Chiles)

EAST: Decent supply is available from South Florida & Plant City. FOBs are steady with excellent quality available.
WEST: A few loads are still coming from CA, but MX is the major supplier. Unfortunately, we are in a very active market situation for all chiles, not just jalapenos. Mainland MX is starting to fall short as major weather a few weeks ago strongly impacted supply. Many growers had to either replant or pull their crop completely. FOBs continue to rise a few dollars and quality is only fair at best.

Red and Yellow Bell Pepper

Expect high markets and extremely low volume until the Mexican season ramps up. The California desert season is coming to an end; many growers have finished harvesting for the season. Quality is fair: scarring is an industry-wide problem.

Pineapple

Prices are high; volume has fallen. Quality is good: sugar levels range from 13 to 16 Brix.

Idaho Potatoes

Demand has increased on all cartons and pricing is starting to reflect that. While the Norkotah crop has been on the larger side, the Burbanks have been showing smaller sizes with very limited availability on large cartons. Quality has been excellent, and transportation has been a challenge.

Radishes

Supplies are steady, and quality is good shipping through Arizona and Florida.

Salad Blends

The market is high due to limited romaine stocks. The recent FDA ban on romaine has been lifted for products not grown in Central or Northern California, but cold weather is keeping volume low. Lettuce ice is reducing overall supplies.

Snow and Sugar Snap Peas

Prices are coming down and product is available

Spinach (Bunched)

EXTREME Very limited supply and quality is fair, due to cold weather preventing the product from sizing up.

Spinach (Baby)

EXTREME Very limited supply and quality is fair.

Spring Mix

Prices are stable; supplies are tight due to cold weather and lettuce ice in the fields. Quality is average: purple shade is an issue in chards. Shelf-life may suffer due to the low temperatures.

Sweet Potatoes and Yams

WATCH LIST This market has spiked due to heavy damage in the Carolinas.

Yellow Squash/Zucchini

EAST: Both are readily available at good prices; however, buyer beware. Some of the “deals” are actually only fair quality.

WEST: Zucchini is readily available, however yellow squash remains somewhat snug. FOBs are steady on zucchini, and steady to slightly down for yellow. Quality is excellent for zucchini and fair for yellow squash.



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Produce (continued)

TOMATOES (EAST)

Rounds

Ruskin/Palmetto continues on the downhill slide while production begins to transition further south to Immokalee/Naples area. Sizing on the XL side continues to be very snug while LG & MD are a bit more available, but still tight. Demand has been lighter than usual following the Thanksgiving holiday and since FOBs rose a few weeks ago. FOBs moving into next week are steady for XL & LG while MDs are down just slightly. We are still in a trigger situation. As projected, supply will continue to be tight and prices higher than usual for the next 14 days approximately until MX and FL can both get more volume to the pipeline. Quality continues to be excellent.

Romas

Ruskin/Palmetto continues on the downhill slide while production begins to transition further south to Immokalee/Naples area. Plantings have decreased, thus, less supply. However, with the recent dip in demand, it appears Romas are making a turn for the better for pricing. FOBs are down a few dollars on all sizes, but we are still in an active trigger situation. Quality is excellent.

Grapes

Most production has moved southward to the Immokalee/Naples & Labelle area. Ruskin/Palmetto is wrapping up their season quickly. Supply is down overall due to weather conditions but improving week over week. Look for some relief on FOBs, but still continue to be in an active trigger situation. Quality is mostly good.

Cherries

A little dip in demand puts some very slight downward pressure on FOBs. Quality is good.

TOMATOES (WEST/MEXICO)

Rounds

Things are still weak and slow moving out of MX. Volume is not expected to be at normal conditions until closer to the New Year when Culiacan ramps up. Hurricanes and heavy rains struck the Baja region significantly. Cool weather with little sunlight in November affected production for the Northern regions along with their seasonal decline. Finally, central MX had a recent freeze that affected many areas, some worse than others. Most western demand continues to pull from the east as MX does not have enough supply to meet demand. Thus, FOBs will follow the eastern update. Quality from MX for what is available is good to excellent.

Romas

Supply is still light from all major regions due to the weather conditions listed above in the western round update. However, there is a bit more supply this week cross at major checkpoints, putting some slight downward pressure on markets. Look for FOBs to fall a few dollars, but note we are still in an active trigger situation. Quality is excellent.

Grapes

There is a bit more volume crossing through Nogales, but still not enough supply to meet demand. Cool and rainy weather is taking a toll on the total volume, keeping us still in an active trigger situation. We are not out of the weeds yet, but improving. Quality is mostly good.

Cherries

Supply is very limited from the Baja region and only light numbers are coming from Nogales. Look for some very slight upward pressure in this market. Quality is fair.

Watermelons

The market is unchanged; stocks are adequate. Quality is good: sugar levels range from 12 to 13 Brix. Offshore melons are now available.

