



# MARKET TRENDS

FOR WEEK ENDING DECEMBER 28, 2018



# MARKET TRENDS

DECEMBER 28, 2018

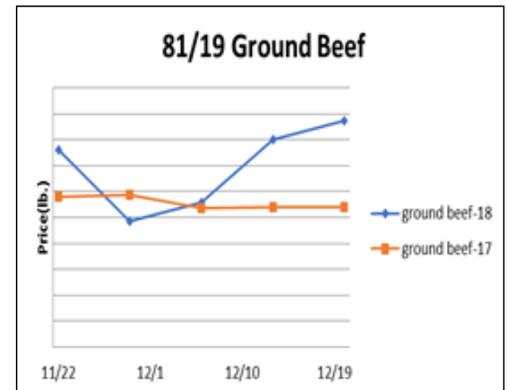
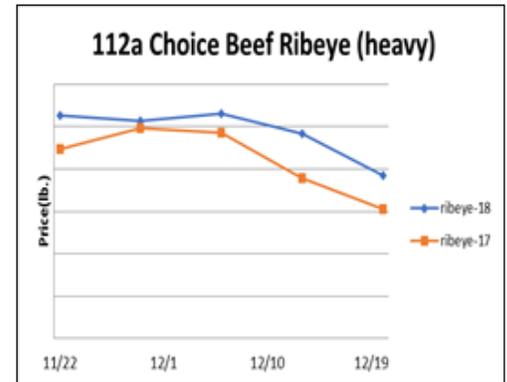
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FOODSERVICE



## Beef, Veal & Lamb

Last week's cattle harvest eased from the prior week but, at 654,000 head, was 4.1% larger than the year prior. Heading into the last few weeks of the year, carcass weights are expected to temper total production. Carcass grading remains exceptional. Prime grading posted a new all-time high at 11.03%. Since cattle were reportedly on feed for longer periods throughout 2018, higher quality grades and heavier placement weights will likely continue into 2019. As expected, retailers are in full holiday mode, featuring ribeyes and round roasts aggressively heading into Christmas. The grinds are likely to garner a modest boost next month, but history has shown that winter demand is usually sluggish.

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



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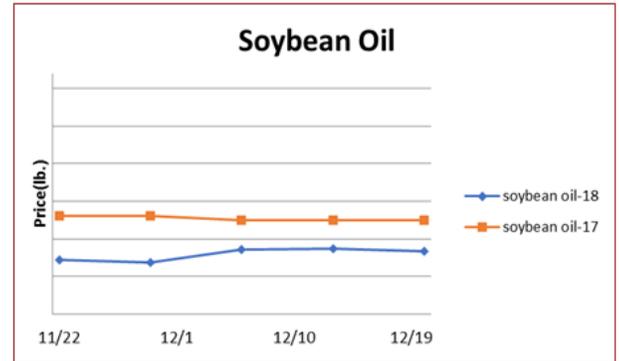
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## Grains

The soybean markets continue to track well below year ago levels. New soybean export sale tenders to China have been announced during the last week with promises for more. But the world and U.S. soybean supplies are projected to remain ample. This could temper the upside risk in the soybean complex this winter.

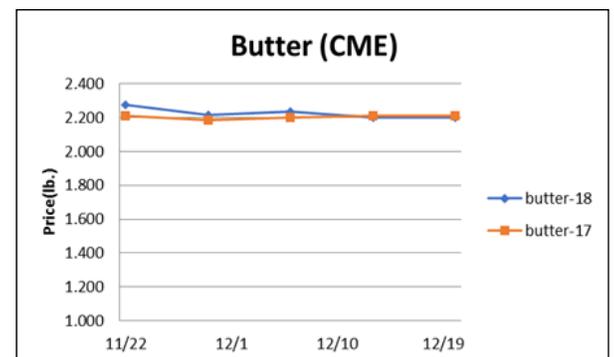
Description	Market Trend	Supplies	Price vs. Last Year
Soybeans, bushel	Decreasing	Good	Lower
Crude Soybean Oil, lb	Decreasing	Good	Lower
Soybean Meal, ton	Decreasing	Good	Lower
Corn, bushel	Decreasing	Good	Higher
Crude Corn Oil, lb	Increasing	Good	Lower
High Fructose Corn Syrup	Decreasing	Good	Higher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



## Dairy

The cheese markets have found some support over the last week. CME Class IV milk futures have risen notably and are now carrying a premium over their equivalent Class III milk futures through at least next year. This encourages milk supplies to go to butter manufacturing instead of cheese production. It's likely that the cheese markets are near (or already have set) a long-term bottom. The spot butter market has been seasonally declining this month due in part to fulfilled holiday orders. Since 2015, the average move for the spot butter market during this week and next was down 9.9%.

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)	Increasing	Good	Lower
Mozzarella Cheese	Increasing	Good	Lower
Provolone Cheese	Steady	Good	Same
Parmesan Cheese	Increasing	Good	Lower
Butter (CME)	Increasing	Good	Lower
Nonfat Dry Milk	Decreasing	Ample	Higher
Whey, Dry	Decreasing	Good	Higher
Class 1 Base	Steady	Good	Lower
Class II Cream, heavy	Decreasing	Good	Higher
Class III Milk (CME)	Increasing	Good	Higher
Class IV Milk (CME)	Increasing	Good	Higher



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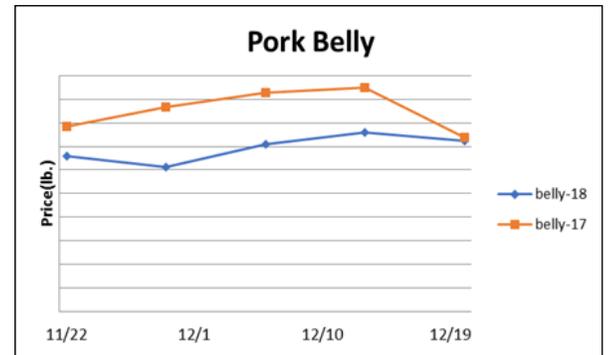
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## Pork

Last week's hog slaughter was estimated at 2.61 million head, the second largest weekly kill ever. Despite expanded production schedules, pork prices have fared well throughout the week. Retail ads for holiday hams were disappointing, at best, as retail ham features were down 27% vs. 2017, but the feature price was nearly 7% over year ago. Perhaps retailers are waiting until this weekend to break big ads ahead of two back-to-back holiday weeks. During Q1, hog slaughter is likely to slow, but production is still expected to increase 3% year-over-year.

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



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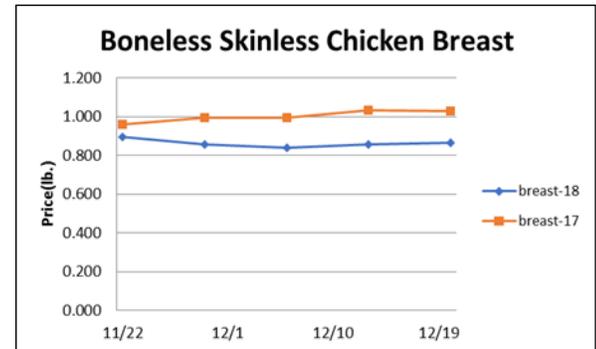
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## Poultry

Following an aggressive run throughout the front half of 2018, chick placements have slowed into late year. Languishing prices have led to depressed integrator margins, leaving expectations for early 2019 chicken production to run as much as 3% below a year ago. Seasonally, placements rise from mid-November into late-December, but this year's placements are only modest which should provide price support. Breast meat prices remain historically low but have failed to break the flat-pricing cycle witnessed in early October. Chicken wing prices have edged higher heading as of late but are still 10% below a year ago. But, struggling wing prices appear to be presenting opportunities to lock in product at favorable levels.

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



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



## Eggs

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

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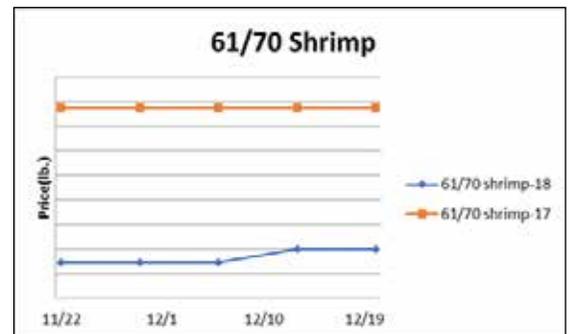
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## Seafood

Salmon prices are modestly above 2017 levels. This is despite solid imports. During October, the U.S. imported 8.9% more salmon than the previous year. The elevated U.S. dollar value is expected to continue to encourage solid salmon imports during the next several months. This factor could cause salmon prices to fall below year ago levels later in 2019.

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

## Retail Price Change from Prior Month

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

## Various Markets

Nearby cocoa futures have increased 9.2% during the last week. The West Africa main cocoa harvest is occurring. Analysts have reduced Ivory Coast anticipated production down .7% from earlier expectations. Nearby cocoa futures may revisit the quarterly pivot level at \$2,230 before January.

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	Decreasing	Good	Lower
Honey (clover) lb	Steady	Good	Lower



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## Produce

### Market Overview

Due to market disruptions from the CDC Romaine advisory along with the winter growing season experiencing cooler than normal temperatures many items continue to be ESCALATED but improving. Broccoli, cauliflower, kale, iceberg, green leaf, spring mix, arugula, and spinach crops are showing improvements. The fields are still experiencing lower yields, lighter weights, and poor quality. Overall available volumes/yields continue to be lower with anticipated higher prices. Strawberries and celery are still in an EXTREME market and Jalapenos are in an Act of God.

### WATCH LIST

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

### Apples & Pears

The market is level; storage stocks are abundant. Quality is excellent: fruit is crisp and juicy. Sugar levels range from 14 to 18 Brix. The Pear market is level. Washington Bartlett and D'Anjou Pears will be available through January; 70- through 90-count sizes are tight. Sugar levels range from 12 to 14 Brix.

### Artichokes

Supplies industry-wide are fair. Prices are higher on large artichokes and steady for small sizes.

### Arugula

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

### Asparagus

High prices persist. Volume is low in both growing areas. Mexican quality is best: spears are deep green and tips are compact.

### Avocados

The market is easing. Mexican supplies continue to increase; offshore volume is also available.

### Bananas

Bananas are showing high quality and supplies are good and should remain steady for the remainder of the year.

### Beans

EAST: Things are stringing along with a little weakening FOB pressure as there is adequate supply to meet the holiday demand. Quality is mostly good, but there are some questionable lots.  
WEST: Mainland MX is keeping FOBs green on the bean front. Markets have balanced out at a reasonable price point for the holiday season. Quality is fair to good with many #2s available.

### MARKET ALERT

- Arugula – ESCALATED
- Broccoli – ESCALATED
- Brussel Sprouts - ESCALATED
- Cauliflower- ESCALATED
- Celery – EXTREME
- Jalapenos – ACT OF GOD
- Kale - ESCALATED
- Lettuce (Green and Red Leaf) – ESCALATED
- Mushrooms – ESCALATED
- Red Bell Peppers – ESCALATED
- Red Cabbage – ESCALATED
- Spinach (Baby & Clip) – ESCALATED
- Spring Mix – ESCALATED
- Strawberries - EXTREME
- Tomatoes (Rounds & Romas) – ESCALATED



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## Produce (continued)

### Berries:

#### Blackberries

Prices are up; volume has fallen a bit due to rain and cold weather in Mexico. 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 slightly higher than last week. Stocks are tightening in Mexico, putting pressure on South American suppliers. Quality is good: berries are deep blue with a slight blush and sweet, yet tangy flavor.

#### Raspberries

The market is up; cold winter weather is reducing volume. Quality is very good: sugar levels range from 13 to 14 Brix.

#### Strawberries

The market is high; cold weather has impeded growth. Expect bleeding, bruising, and shortened shelf-life throughout the industry.

#### Bok Choy

Quality is average, and demand is fair.

#### Broccoli

Prices are finally inching down a bit; Arizona/ California desert supplies are becoming more plentiful. Hollow core and pin rot remain industry-wide issues, but harvesting crews are culling affected heads at the field level.

#### Brussels Sprouts

ESCALATED Brussels sprout supplies are low and prices are higher.

#### Cantaloupe

We are done here in the Arizona and California deserts, and have started receiving some light volumes here on the west coast and volumes will start to increase each week going forward. The east coast has better volumes than we do here on the west but still a pretty strong Market. The overall quality is good, with a green cast and very firm fruit, the brix is around 12 but eat a little flat. Interior color is good to fair, but as we progress through the month we will see better eating fruit.

#### Carrots

We are seeing both good quality and volume.

#### Cauliflower

Prices are low; stocks are abundant. Quality is good: discoloration and uneven size are occasional problems.

### Celery

The market is climbing. Yields are down dramatically in the Oxnard growing region due to a disease called Fusarium. Pith and growth cracking are issues as well.

### Cilantro

Supplies are fair, and quality is improving.

### Corn

Steady supply and good quality out of Florida.

### Cucumbers

EAST: Production is slow and low in the east; however, Honduras offshore product is ramping up. Cukes are seeing weak FOBs. Offshore quality is great while FL is seeing some struggles due to weather.

WEST: Great quality and supply is crossing daily. Weather has been great, and things are looking up. FOBs are down a couple of dollars and quality is excellent.

### Eggplant

EAST: Supply is readily available 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.



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## Produce (continued)

### 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

Quality is good with great availability.

### 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

We are still going here in the Central Valley which will take us through December and possibly into the first of the year. We are expecting to have good quality fruit through the end of the season, also we will be shed packing fruit as well to look over quality as the fruit has been in storage in tubs. We will have snack packs if you have any interest please let us know. The first of the Chilean will also start arriving just after Christmas here on the west coast and there is fruit on the east coast at this time from Peru and some light supplies of Chilean.

### Green Cabbage

Supplies are improving and priced are trending downward.

### Red Cabbage

ESCALATED Supplies are lower than normal and prices are rising.

### Green Onions

There is lighter volume, due to rain from 10 days ago, which is creating slower production from harvest crews. The Christmas and New Year's pull will create increased demand for the next 10 days as well. Quality is good.

### Honeydew

Market strong as well as Mexico is our main source of volume, we will see some of the Guatemalan fruit coming in about 2 weeks, we anticipate the market to keep strong. The overall quality of the fruit is fair to good with some of the weather causing some discoloration and heavy scarring, the fruit has gone through some tough weather and it shows.

### 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

Market is steady, as we are going out of Dist. 3 and also here in Dist. 1, This year's crop out of dist. 1 will take us into May, and the crop volume is of normal size and should have a decent run of size. The dist. 3 fruit is being gassed and seeing some spotting and green tinge around the stem and blossom end, but fruit is firm and juice content if fair to good. We will be finishing Dist. 3 around the end of January; the overall quality is good and will continue to get better as our color gets better in the field and we are gassing less hours.

### Lettuce:

#### Butter

Quality is good, and the market is seeing some improvements.

### Green/Red Leaf

ESCALATED The market is slowly improving, and quality is good.



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## Produce (continued)

### Iceberg Lettuce

The market is improving, and quality is good.

### Romaine

Quality is good, and the market is showing improvements.

### Romaine Hearts

Quality is good, and the market is showing improvements.

### Limes

Prices are starting to rise; 175-count and smaller sizes are tightening. Quality is good: scarring is minimal.

### Napa

Demand, supply, and quality are all good.

### Onions

The market is stable despite strong demand in all regions. Prices might bump up a bit over the upcoming holiday weeks as production will be limited. Storage quality is excellent.

### Oranges

We are going full swing on the 2018/2019 California navel crop and will continue with navels through April, the overall crop volume is up about 20% with this being said we will have good supplies of 88's-138's through the season. The larger size fruit will be on the tighter side, for the through the first of the year, we had some rain Yesterday and are expecting some more over the weekend, so we will pray that is the case. This will help size up the fruit, and sugars continue to get better which have been around 12 brix, so fruit does eat good and will only get better in the coming weeks. Also the navels are being gassed about 24-48- hours to bring on the color, you will see some green tinge and some spotting due to the gassing here and there but nothing overwhelming. We will probably be done gassing by the first of the year as well. We anticipate a good quality year on navels going forward.

### Parsley(Curly, Italian)

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

### Green Bell Pepper

EAST: Despite new growers & blocks coming on board, overall acreage is down, and some growers are in crown picks and moving into 2nd and 3rds. Things just haven't been able to take off in the FL region. With that, supply is still a little light, but demand has been quite lackluster. Therefore, FOBs are down just ever-so-slightly. Quality is mostly good.  
WEST: What little is coming from CA still is poor quality. Mainland MX has picked up more volume despite the supply ebb and flow over the last few months. FOBs are down slightly with excellent quality available from the Mainland region.



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## Produce (continued)

### Jalapeños (Chiles)

EAST: Chiles in the east are red hot! With the western struggles, more demand is turning east but there is not enough supply to meet demand. Thus, FOBs are up significantly, and quality is fair to good.

WEST: We continue to be in a fiery market for all Chiles and tomatillos. Mainland MX is falling short due to prior major weather events. Cold snaps, heavy rains etc have wreaked havoc, forcing growers to scrap crops and replant. Things will be tight through December and also halfway through January. FOBs are blazing hot and quality is only fair at best.

### Red and Yellow Bell Pepper

Skyrocketing markets are forecast for the next week or two. Supplies are extremely tight as the industry approaches a harvesting gap between the California and new crop Mexican seasons. Quality remains fair: scarring is an industry-wide issue.

### Pineapple

Prices remain high; volume is low in Costa Rica and Mexico (into Texas). Quality is average: fruit is firm, yet juicy, with sweet, slightly tangy flavor. Sugar levels range from 13 to 16 Brix.

### Idaho Potatoes

Prices should remain stable unless snow and low temperatures disrupt potato hauling. The storage crop is dominated by 80- to 100-count sizes.

### Radishes

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

### Salad Blends

Raw product supplies are finally increasing, as is quality. Inspectors are closely monitoring finished packs for chunks and core material to achieve the best mix.

### Snow and Sugar Snap Peas

Product continues to be tight.

### Snow Peas

Volume will start falling next week and prices will start rising.

### Spinach (Bunched)

ESCALATED Quality is fair due to cold weather preventing the product from sizing up, and the market is improving.

### Spinach (Baby)

ESCALATED We're seeing some improvements in the market, and quality is fair.



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## Produce (continued)

### Spring Mix

Prices are unchanged; desert region stocks are starting to increase. Quality is very good: discoloration is minimal.

### Yellow Squash/Zucchini

EAST: Both are readily available, but good quality demands a firm FOB. There is a significant amount of both yellow and green squash available at low prices, but quality is questionable.

WEST: Both yellow and green squash are readily available. Yellow squash FOBs are slightly down while Zucchini is low and steady. Quality overall is mostly good.

## TOMATOES EAST

### Rounds

Ruskin/Palmetto are for the most part done. They have moved on from crown picks and into 2nd, 3rd and even 4th rounds. Quality from the crowns was excellent, but quality from these later picks are questionable. Production and demand have moved to the Immokalee/Naples area. Quality is very nice from this region, but size continues to be short. By this, we mean that big fruit is very tight, while small fruit is more readily available. Look for supply to ramp up around January 1, which is also when the western region will have more supply as well. For next week, FOBs are down just slightly as supply is slow to catch up to demand. However, in the following weeks, look for things to dip a little quicker.

### Romas

Ruskin/Palmetto are for the most part done. Most supply and demand has transitioned to the south in the Immokalee/Naples area. Things are improving quickly with supply but bear in mind overall total acreage planted is down, therefore there is still less supply than in prior years. Look for volume in Florida to remain a little snug until the spring time. Fortunately, MX supply is increasing, giving pricing relief. FOBs are down a few dollars and quality is shaping up nicely.

### Grapes

Production is a little scattered, but mostly in the southern region. Supply has continued to be light over the last few weeks and moving into next week. FOBs are steady to slightly down depending on growing region. Quality is good to excellent.

### Cherries

Things are steady as can be. No changes in supply or prices for next week with quality still good to excellent.

## TOMATOES WEST

### Rounds

Week to week, more fruit is crossing, but in very small light volumes still. There is not enough supply to meet the entire western demand. Therefore, the west turns to Florida for one more week until things shape up. Look for the FOB curve to turn down right around January 1st, especially coming out of the slow holiday season. Quality overall is nice. Mainland MX is starting to ship a handful of mature greens, but again, still not nearly enough supply to meet demand.

### Romas

Romas are a bit quicker to come out of the recent up and down-market pattern. Good supply is finally starting to come across, but it is sized heavier to the bigger fruit. Smalls/Mediums are actually less available than in prior weeks. FOBs are dropping quickly with excellent quality available.

### Grapes

Baja continues to wind down with subpar quality available. Nogales continues to build their volumes to strong numbers with excellent quality available.

### Cherries

Similar to grapes, Baja is wrapping up and quality is questionable. Nogales is expected to see improved supplies crossing each day with good quality available. FOBs are steady this week.

### Watermelons

The market is elevated; Mexican growers have transitioned production to Southern Mexico, increasing freight costs to the U.S. Overall availability is limited. Quality is good: sugar levels range from 12 to 13 Brix.

