A photograph of several sweet potatoes resting on a rustic wooden surface. A portion of a burlap sack is visible in the upper left corner. The text 'FARMER'S REPORT' is overlaid in a large, white, outlined font.

# FARMER'S REPORT

MARKET TRENDS | 10.31.2014

**US.**  
**FOODS**<sup>®</sup>  
KEEPING KITCHENS COOKING.<sup>®</sup>

# MARKET HEADLINES

Markets are following seasonal trends with prices increasing in two areas – Beef and Produce. Tenderloins and ribeyes continue to increase in price due to normal seasonal demand. In Produce, Tomatoes and Lettuce are changing growing regions and supplies are limited.

If you have not yet set your fall/winter menu, now would be a good time to review your pricing and incorporate these market trends. Have you considered market pricing for some items...an easy to use tool, Menu ProfitBuilder Pro<sup>®</sup>, is available from your US Foods<sup>®</sup> rep



## BEEF



### TENDERLOINS

Tenderloins are in good demand as buyers continue to secure their Holiday needs. Pricing will continue to advance into November based on needs, lower slaughter levels, and higher live cattle costs. Select will most likely peak in the next couple of weeks. Now is the time for customers to evaluate their needs, if they have not done so already.

### RIBEYES

Ribeyes remain firm as buyers continue to secure product for the Holidays. They will continue to rise moderately into November, not just based on demand, but also lower slaughter levels and live cattle costs will contribute to drive higher prices. Choice is expected to advance at a greater rate than select. This is a great opportunity for customers to secure product and help offset some of the higher prices expected.



## PRODUCE



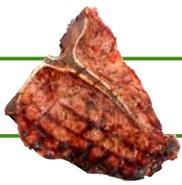
### LETTUCE

The lettuce market is experiencing severe market conditions as we head into the transition period. The growing area is encountering unfavorable weather conditions which are limiting supply. With the warmer temperatures in Salinas, growers were forced to harvest sooner than expected. At this time, there is not enough supply to meet demand for iceberg and romaine. In addition to limited supplies, there are quality concerns due to the heat and pest damage. The extended outlook is that relief is several weeks away, dependent upon harvesting time in Yuma.

### TOMATOES

The tomato market continues to experience major challenges as supplies remain extremely tight. With the drastic increase in FOB, the demand for tomatoes has decreased, which has caused prices to flatten this week. We will continue to experience shortages and quality issues for the next few weeks until the Palmetto region's harvesting is in full swing.





# BEEF

Live cattle traded at a record \$170 last week; \$6 higher than the previous week. The increased live costs and still limited slaughter will advance pricing on several items, especially end cuts like rounds and chucks. We are expecting further cuts in production and live costs to stay in this general area until middle December.

## ROUNDS

**INSIDES:** All grades of insides were lower last week, but will probably see some near term strength before moving sideways to lower in the coming weeks.

**FLATS:** Bottom round flats followed the inside round complex. Again, we may see some short term increases, but they are expected to move moderately lower in the next couple of weeks.

## LOINS

**STRIPS:** Choice strips moved lower; selects higher. Strips will most likely increase in price over the next week before weakening to seasonal lows in the late fall.

**TOP BUTTS:** Top butts were basically flat, but interest has rekindled on tops and we could see higher pricing next week. When they drift off into the fall, it will be at a very slow pace.

**BALL TIPS:** All grades of ball tips are moving lower and should continue into the fall.

**TENDERLOINS:** Tenders remain in good demand, especially choice. They are expected to move higher into the Holiday season peaking sometime at the end of November or beginning of December.

## RIBS

**RIBEYES:** All ribeyes took an increase last week, especially choice lights. Select heavies took a little bit of a decline, and selects will continue to be more vulnerable this fall. Overall, expect the market to move higher the closer we get to the Holidays.

## CHUCKS

**CHUCK ROLLS:** Chuck rolls were flat last week but expect them to move higher in the short term due to higher live costs, and continued interests from grind processors and lack of lean boneless trim. There still may be some weakness this fall.

## THIN MEATS & GRINDS

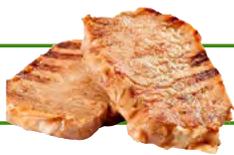
**FLAP MEAT:** Thin meats declined once more, but remain vulnerable to price fluctuations. You may see some higher prices the next couple of weeks due to higher live costs, but there is still risk to the downside.

**BRISKETS:** Briskets will remain strong even moving into the fall. Demand is outpacing supply at this time and with higher live costs, we don't foresee much relief anytime soon. .

**GRINDS:** Grinds were higher last week and will remain firm going into fall with continued strong demand outpacing supply.

**SKIRT MEAT:** Skirt meat reported down from previous week, and is positioned to take another downward price move over the next several weeks, but remain vulnerable to price fluctuations.





# PORK

Base hog prices reported steady to slightly lower as hog supplies remain abundant. Most buyers are well supplied for this week and looking to fill their schedules for next week. Last week slaughter numbers were reported at 2.14million head, down 5% from a year ago. This week's numbers are expected to come in steady at 2.195 million head, about 4% below year ago. Buyers are anticipating hog supplies to move higher week over week through the end of the year, however slaughter numbers are expected to remain about 3% below year ago levels through 2014.

Hog weights continue to hold steady but weights are still running about 3% above year ago levels. Weights are at record levels for this time of year and may move slightly higher over the next 4-6 weeks. Typically heavier animals result in larger pork cuts which may impact the availability of lighter or smaller "sized" items.

On the overall demand side week over week, the majority of commodity pork cuts experienced price declines. Buyers are focusing on Thanksgiving promotions and this has created increased supplies of commodity cuts on the market. This increase in product availability may result in gradually declining prices over the next few weeks. On the processed meat side, hams and bellies were both lower on increased supplies of fresh product and weaker demand. Expect prices for hams and bellies to gradually move lower during November.

## LOINS

The market for bone in loins and boneless loins dropped last week due to increased product availability and continued weak demand. Prices for bone in loins and boneless loins are expected to continue trending lower through mid November. As the holiday season approaches, prices may find support and firm as retailers feature pork loin (in their December features) as a low cost alternative to higher priced beef items.

## TENDERS

Pork tenders moved lower last week due to excess supplies and weaker product demand. Retailers are focused on turkey items for November promotions. Prices are expected to move lower through mid November then firm late November/early December.

## BUTTS

Prices for pork butts continued lower last week due to a combination of lackluster demand and additional supplies. Prices are expected to trade steady to slightly lower through mid November then hold steady through early December. Expect prices to remain above year ago levels.

## RIBS

Spareribs continue to gradually move higher week over week. This is due to tighter supplies as packers prefer to convert larger spareribs into value added St Louis Ribs. This reduces the supplies of light spareribs and firms up the pricing. Prices are expected to trade steady to slightly higher through the November timeframe. Back Ribs traded steady to slightly lower last week due to lackluster demand. Prices for Back Ribs are expected to trade steady to slightly higher through November. Lighter Spareribs, St. Louis ribs and Back ribs are expected to remain in tight supply (due to heavier hog weights).

## BELLIES/BACON

Bacon/Belly prices continued lower last week due to an increased supplies and lackluster product demand. Prices are expected to trade steady to lower through November due to a lack of retail features. Prices are expected to begin moving higher mid/late December as retailers promote bacon items.

## HAMS

Ham prices moved lower last week due to increased supplies of fresh hams. Ham prices are expected to gradually move higher through November as processors continue to produce hams for the holiday season. Ham prices are expected to remain above year ago levels through late fall.

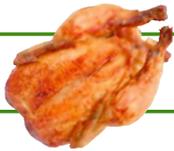
## TRIM

The following market dynamics will impact finished goods pricing during November. Pork trimmings started their seasonal move lower and are expected to continue moving lower through the end of this year. Thus prices for processed meat items, like hot dogs and dinner sausage are expected to move lower during the November time frame. Prices expected to remain above 2013 levels.

## PICNICS

Pork Picnics moved lower last week due to weaker product demand and a reduction in export orders. Prices are expected to move lower during November. Increased export demand may support higher prices during the fall timeframe.





## TURKEY

### WHOLE FROZEN TURKEY

The Whole Frozen Turkey market increased slightly the week as the holiday bookings are starting to ship, with last minute buyers entering a market that has very little supply. The availability of small birds is almost nonexistent.

### BONELESS SKINLESS TURKEY BREASTS

Though the frozen turkey breast market has remained steady, there is every indication that this market will start dropping dramatically as we finish the Thanksgiving season. The market is \$ 4.00 but will likely be in the mid two dollar range in two to three months.



## POULTRY

The theory of supply and demand has taken hold of the poultry market. The chicken supply is going up and the demand, largely due to the retail segment featuring typical holiday items and not chicken, is lagging slightly. The growth in the poultry supply is due to a few reasons. First, the breeders have made great strides in replacing the older hens with younger birds that are mature enough to produce at a higher level. The fertility issue is being managed by the amount of feed that is given to the hens. The food is being metered more carefully because the genetic fault in the Ross birds cause the hens to lay fewer eggs when they get heavier. The chickens are on a diet now. Third, the weather conditions in the poultry growing states have been absolutely perfect for optimum growth. All of these factors are forcing the producers to work on Saturdays, giving the supply side another day of harvesting meat.

Hatcheries in the United States weekly program set 202 million eggs in incubators during the week ending October 18, 2014, up 4 percent from a year ago. Hatcheries in the 19 State weekly program set 195 million eggs in incubators during the week ending October 18, 2014, up 4 percent from the year earlier. Average hatchability for chicks hatched during the week in the United States was 84 percent. Average hatchability is calculated by dividing chicks hatched during the week by eggs set three weeks earlier.

Broiler growers in the United States weekly program placed 171 million chicks for meat production during the week ending October 18, 2014, up 2 percent from a year ago. Broiler growers in the 19 State weekly program placed 166 million chicks for meat production during the week ending October 18, 2014, up 2 percent from the year earlier. Cumulative placements from December 29, 2013 through October 18, 2014 for the United States were 7.23 billion. Cumulative placements were up slightly from the same period a year earlier.

### BONELESS SKINLESS BREASTS

The deflationary trend of the last few weeks slowed down this week as the market fell just a few cents. The competitive prices have brought more demand for this product. Though the retail segment is not featuring breast meat in ads, they are pricing the product to sell.

### CHICKEN TENDERLOINS

The tenderloin market deflated s more than the breast market, as demand still lingers. The price difference between the two markets has reached the normal winter spread of approximately a nickel.

### WINGS

The wing markets dipped slightly. Processors have been working on Saturdays as the growing conditions for birds have been perfect. With the retail segment not featuring wings in deli's, this market should trend sideways or dip slightly in the next few weeks.

### BONELESS SKINLESS THIGHS

The boneless thigh market remained flat this week as further processors continue to drive this market. Though this market was well supported this week, however this market should slide slightly in November.





# COMMODITY GROCERY

## SOYBEAN OIL

**WEATHER:** Traders are expecting bean harvest progress report to show 48-52% complete, vs. 65% average. The U.S. soybean harvest is expected to expand rapidly next week under mostly favorable weather conditions. Traders are anxious to see the domestic pipeline fill up. Note: Warm and dry conditions are optimal for harvesting and are better for yield (vs. cool & moist).

**CROP:** Wednesday's NOPA report pegged the September soybean crush at 99.97 million bushel, well below the average trade estimate of 107.6 million and the lowest September crush since 1996 at 99.30 million bushel. September soybean oil stocks were estimated at 936.88 million pounds, well below the average trade guess of 1.051 billion and the lowest since 1.08 billion in September of 2003. The soybean harvest was reported at 40% complete, up from 20% last week but still well behind the five year average of 53%.

**PRIVATE ANALYSTS:** Soybean yield estimates continue to increase for this year's crop. The USDA report is projecting a national average yield of 47.1 bushels per acre (the highest ever) on yields compared to their September's projection of 46.6 bpa. The US dollar is strengthening which increases the price on exports.

**WORLD NEWS:** Brazilian soybean acreage is expected to be up nearly 5% this fall and planting is now underway there. Mato Grosso Brazil bean planting is estimated at 9% complete last week, compared to 18% last year as farmers wait for better planting conditions. Rains forecasted for the last week of October. Brazil is expected to have a bumper crop.



## DAIRY

### BUTTER

The butter market continues to show weakness which is bringing markets closer to expected levels. September butter stocks reported in at 5 million pounds higher than expectations. Production is increasing seasonally as cream is available. Because markets are moving closer to global prices, export demand is starting to increase.

### CHEESE

Block markets have been very volatile over the past few weeks. Markets were not expected to make such drastic moves so early in Q4. It seems as though holiday orders are mostly fulfilled and markets should continue to trade within the current range through the remainder of 2015. Fundamentals support a relatively stable market for the rest of Q4.

### SHELL EGGS

Markets are mostly flat this week with the larger sizes showing slight increases. California is instituting new shell egg laws effective in 2015 which will impact the entire shell egg industry. Expect inflation on shell eggs as we get closer to 2015 along with decreased supply.

### MILK & CREAM

For the month of November, Class II butterfat prices decreased by double digits. Just in time for the holiday season, items that have high butterfat content will have decreases, specifically, whipping cream, half and half and heavy cream. Butterfat pricing should continue to decline in December.



## SEAFOOD

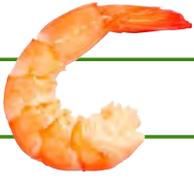
### SHRIMP, DOMESTIC (WHITES AND BROWNS)

The Brown shrimp season is almost done and prices are now stable. The White shrimp market is still going strong and we feel there is still a downward side to this market. The market on 26/30 shell on Browns and Whites are at a good value but we feel there is still some down side to this market. 16/20's and 21/25's are still bringing a premium price in relation to the other sizes.

**DOMESTIC PUDS:** The catch of small shrimp has really taken off this week with good inventories. We are nearing the end of the catch in the next 3-5 weeks. We are looking at good inventories on all sizes. Price is weak and more room to go lower.

### SHRIMP, LATIN – CENTRAL AMERICA (WHITES)

41-50 count and smaller are barely steady at listed levels with some slight discounting noted on the 41-50 and 51-60 due to quiet demand. Although pricing is not changing a lot this week, it has been on the rise the past few weeks as a result of the typhoon in China.



# SEAFOOD (CONT'D)

## SHRIMP, IMPORTED

### (BLACK TIGER AND WHITES)

**TIGER:** The HLSO market is stable with signs of lower pricing. Inventory is slowly moving and vendors are looking to move product. Retail commitments are filled. We still feel Tigers overall will be tight supply as we've been recommending, conversion to whites remains a sound strategy, as the market will now dictate large gaps in pricing between the Tigers & Whites.

**WHITES:** The Asian and Latin markets have shown their first signs of weakening. We are not sure how long this trend will last. There is still concern once China starts to buy that prices will move up. Europe markets are slowing down and is helping to unsettle the market.

## CATFISH, DOMESTIC & IMPORTED

**DOMESTIC:** The domestic catfish was steady this week and supplies are adequate for demand.

**IMPORTED:** The market is starting to see some upward movement this week; as product is getting tighter. Inventories in the US are getting tighter, and in some cases not available. This is a result of the spring harvest that was considerably lower than LY. Awaiting fall harvest to set pricing that will take us into December.

## SALMON

**CHILEAN FARMED SALMON:** The Chilean frozen fillet market remains unsettled. Mostly lower offerings are noted on all sizes. There does not seem to be an issue with inventory and all sizes of filets are in good supply. The Chilean Fresh whole fish have had a small decrease in price. We do not think this will be a long term change and the market will become steady.

**WILD ALASKAN SALMON:** The net king market trended lower and a few still lower offerings are noted. Supplies of net kings are fully adequate for a lackluster demand. The troll king market is unchanged along with the Sockeye, Chum, and Coho markets.

## MAHI MAHI

The Fresh market has settled with the new season starting to get in full swing. We are seeing smaller fish being caught at this time yielding 1-3# loins. We feel this should be a good catch year with lower cost of goods. The catch in November and December will have to be good to drive down prices.

## SCALLOPS

**SEA:** Prices are starting to rise. We feel as fishermen use up their quota prices will continue to rise as product becomes short in the market.

**BAY:** Pricing unchanged this week.

## TILAPIA

Pricing was stable this week on Tilapia, due to this year's supply being better than earlier in the year. However, with China's growing demand for this fish we may see pricing increasing in the fall, especially on larger sizes.

## WHITEFISH COMPLEX

### (COD, POLLOCK, HADDOCK)

**COD:** The market for Atlantic Cod is on the rise, Pacific Cod is showing signs of higher prices with new season 3-4 months away and Atlantic Cod being high.

**POLLOCK:** The market remains stable on both domestic and imported Pollock fillets.

**HADDOCK:** The market was steady this week.

## KING CRAB

**RED & GOLDEN:** Alaska has called for a ban on Russian seafood imports in retaliation for Russia's ban on US food shipments. Despite the justice of this, it may be a case of be careful what you wish for. For King crab, a shutdown of Russian product - which supplies about 90% of the US demand - would destroy the market. After years in which the Deadliest Catch gave a huge boost to crab consumption, nothing would make consumers madder than boosting a product that is unavailable. No retailer or restaurant wants to put themselves in that position of making their customers mad - so there would be a massive migration away from King Crab.

## TUNA, YELLOWFIN

### (CO TREATED)

The market rallied due to higher replacement costs and thinning inventories in the U.S. The undertone is full steady.

## CRABMEAT

### (BLUE & RED, PASTEURIZED)

Both Blue and Red markets are stable this week. Blue Swimming crab meat seems to be in better shape as the pipe line is filling up. Red Crab production has started and we feel as product hits the US in 60 days we may see some weakening in price.

## SNOW CRAB

**CANADA:** Pricing remained steady this week. Supplies are adequate to barely adequate for active demand. Larger Canadian clusters 10 and 12lbs are starting to get tight on supply.

**ALASKA:** The market was stable this week with quiet demand. There may be a bit of discounting on the horizon as traders look to convert inventory to cash so they can participate in the King markets.

## LOBSTER TAILS

**WARM WATER:** Brazil is full steady to firm with a few lower offerings noted on 4 and 5 oz. tails. Production has been related as slow. Caribbean quotations are listed. As North American Lobster prices and inventories become tight look at Warm Water Lobster Tails as a great item to move to with lower costs.

**NORTH AMERICAN LOBSTER:** We see another increase in North American Tails on 3-4, 4 & 4-5 oz. tails. Pricing will continue to climb as inventories continue to sell off. Restaurants should buy now to make sure they have product for the Holiday Season. Factors including fishing in Maine that has been slow to ramp up, a good live demand and an active Asian demand have contributed to the stronger undertone. 7-9 and 8-10 oz. tails continue mixed with some lower offerings noted.

# PRODUCE

## VEGETABLES



### POTATOES

**Russets:** The ID russet potato market is up slightly this week as Norkotahs continue to ship. Gradually more and more Burbanks are coming on the market as they are coming to the end of the sweat period. With this year's crop learning towards the smaller sizes, the demand continues to exceed the supply for the larger sized potatoes. There has been no significant relief with transportation out of the Northwest and it is still recommended to place orders as early as possible.

**Reds:** Overall, the red potato market is up slightly on "A" size and flat "B" sizes. Demand remains fair to light, with the exception of ND. Currently, product is shipping from WA, ID, WI, and CA. CO is finishing up their harvesting and reporting average yields. ND is also finishing up their season and saw higher yields than expected. Some are anticipating that we will transition into a two-tiered pricing structure as there could be drastic differences between quality and color, depending on the grower.

**White, Yellow and Fingerling:** The market remains steady for both white and yellow potatoes. The Northeast region continues to move the largest quantities of white potatoes. The yellow market is seeing good demand, supply and quality.

**Sweet Potatoes:** Harvesting continues in the south and is approximately 75-80% complete. The yields are picking up over the past few weeks and the quality remains good. FOB pricing remains steady, if not down slightly.



### GARLIC

Chinese Garlic Prices have finally come down a significant amount. There is more supply available in most US markets. With Chinese Pricing remaining above the California pricing there is still strong demand for California Peeled Garlic.



### CABBAGE

Market on green cabbage out of California is down this week with light supply and demand. Steady market and good supply and quality coming out of East Coast.



### LEAF LETTUCE

The romaine market is currently mimicking iceberg as FOB has increased and supplies remain tight. Demand is strong but the quality is only fair. With the recent heat, many growers are reporting fringe burn, ribbing and wilting, along with pest damage.



### ICEBERG LETTUCE

The iceberg market is extremely active as we head into the first phase of transition to new harvesting areas. FOB prices have jumped and supplies are very tight out of Salinas. It has been reported that weights are on the light side and there are some quality issues due to the heat.



### ONIONS

Supplies continue to far exceed demand which is causing the market to soften. The Pacific Northwest and Eastern growing regions continue shipping and are reporting an abundance of jumbo and medium yellow onions. The red onion market has also weakened some. The white onion market is holding steady due to the consistent export demand from Mexico.



### CHILE PEPPERS

Market is steady this week on Chile peppers thanks to overlapping production of Mexico and Coachella. There is a wide range of quality and size.



### CUCUMBERS

The cucumber market on the east coast is currently seeing upward pressure on FOB due to supply. Harvesting in GA is now complete and the FL regions are off to a slower start than anticipated, with variable quality. Relief is expected soon as better volume should be available at the end of the week. There is a split market on the west coast due to the variance in quality. Better quality cucumbers are coming through at Nogales, but it is still variable.



### SQUASH

The yellow squash market continues to see good volume for both the east and west coast growing regions. Quality has been improving all around and all regions are seeing a downward pressure on the FOB. Supplies on the east coast for green squash continue to be strong with product shipping out of GA and FL. The demand in this region has been good, which is causing slight upward pressure on FOB. For the west coast, green squash continues crossing at Nogales with good quality and a slight decrease in FOB.

# PRODUCE



## TOMATOES

**Rounds:** The east coast continues to be critically short in supplies due to the recent weather conditions. Quincy is coming to an end of their harvesting season, as we are starting to see light volume from the Ruskin/Palmetto region. Volume will continue to gradually increase in this region until it is in full swing around Thanksgiving. With the drastic increase in FOB, demand is currently very weak. The west coast is also critically short in supplies from CA and Mexico, especially on the larger sizes. CA will be completed by the end of this week. The FOB is down from last week. Overall quality remains variable.

**Cherry and Grape:** The east coast continues to run extremely short on both grape and cherry tomatoes. FOB pricing for both is seeing downward pressure. At this time, there continues to be limited quantities crossing at Baja, McAllen and Nogales. It is expected that volume will increase from these regions around Thanksgiving. CA's harvest will come to an end this week. Overall the FOB is down slightly from last week and the quality is variable.

**Romas:** Supplies from the east coast remain very tight as only light volume is coming out of Palmetto. With the current demand being very weak, the FOB is lower this week. The market in the west coast is varying drastically due to the large variance in price and quality. CA will finish harvesting this week. Product continues to cross at Baja with fair quality and at Nogales, but with light volume. Supplies should increase from Nogales in the next few weeks as this region is experiencing a late crop due to the storms.



## GREEN BEANS

The market is down this week on bushel green beans as there is a lighter supply and moderate demand. However, the market is expected to rise and will be in short supply for the Thanksgiving season.



## EGGPLANT

Eggplant from the East Coast continues to ship out of GA. The market is steady, but with some upward pressure. It is anticipated that additional supplies will be available in the next few days. The West Coast continues to see a steady market with supplies shipping from the desert, Fresno and Nogales.



## BELL PEPPERS

The bell pepper market is seeing slightly downward pressure on FOB for both the east and west coast. Central and South FL, as well as GA, continue to see good volumes and good quality. Northern CA will finish harvesting this week and supplies will continue to cross at Nogales. It is anticipated that there might be a shortage of red bell peppers on the West Coast in November due to delay and damaged plantings.



## CARROTS

Carrots are steady this week with a lighter supply and steady demand. Bakersfield is continuing to produce good quality.



## CELERY

Market remains steady with good supply, quality, and color. There should be adequate supplies of celery for the Thanksgiving and Christmas holidays.



## GREEN ONIONS

Green onion market is down this week. Demand has stayed steady but recent bad weather in the growing areas of Mexico has affected the yield.



## CAULIFLOWER

The market on cauliflower is steady this week. Good supply and demand. There is a wide range in quality.



## ASPARAGUS

Supplies are light coming out of Peru and Mexico but look for this market to remain steady for the rest of October into November.



## BROCCOLI

Market is steady on crowns and bunches this week. Good supply and quality out of East Coast.

# PRODUCE

## TROPICAL



### PINEAPPLES

Pineapple volume is higher than weeks past. Growers are short on smaller fruit. The trend for bigger fruit continues; however expect sizing profile to change toward smaller fruit in the upcoming weeks.



### BANANAS

Banana volume is decreasing weekly. The demand continues to remain on the low side. The market is expected to remain unchanged for the out-weeks. There is a port strike where there were several issues due to the missed trans-shipments from Ecuador this week.



### AVOCADOS

The Mexican avocado market is down this week. There is a gap in pricing on 48 ct and larger fruit that is a higher cost than 60 ct and smaller. This is due to the increase of harvesting with a size curve that is bigger on smaller fruit.

## MELONS



### CANTALOUPE

The market has eased a bit as production out of Arizona has picked up. The overall quality is fair with some ground scar showing up. The netting is a little thin and mostly a green cast. The internal color is good with sugars are fairly good. This crop is expected to go through November and then we will transition to offshore fruit.



### HONEYDEWS

The market is strong as Arizona and California production is light and Mexico has not been crossing any big numbers. The overall quality is good with a mostly green to cream cast and some ground scar showing up as well, but an overall strong condition. Arizona and California will continue through mid November then Mexico will be the main growing region until South America starts in the middle of December.

## BERRIES



### BLACKBERRIES

Mexico blackberries are in full swing with good quality and steady volume. The market has stayed flat from last week. Expect pricing to stay even for the next few weeks with steady Mexican production.



### STRAWBERRIES

Oxnard is picking up Santa Maria is past peak production. Expect to see the first crossings of Mexican fruit later this week. The pricing market was flat from last week. Expect the pricing to increase as Santa Maria moves past their peak production.



### RASPBERRIES

There was no change in pricing from last week. The pricing is expected to stay even for the next week and then increase slightly the following week as production moves past peak. A majority of the production is coming out of Oxnard and Mexico.



### BLUEBERRIES

Pricing has decreased a bit from last week. Expect pricing to stay even for the next few weeks until more Chile product starts coming in. Supplies continue to be tight this week with very light Argentinean inbounds.



### GRAPES

The market is strengthening slightly as harvest season is finishing. Growers are expected to be finished packing in about two to three weeks depending on weather and fruit condition. The overall quality is good with excellent sugar and some lighter colored fruit on the reds but overall condition is excellent. Supplies will remain through December on California fruit and then first Chilean arrivals will be about mid December.

## HANGING FRUIT



### APPLES & PEARS

Most all apple varieties are here now. Braeburns and McIntoshes are now available. Pricing is very reasonable and there is plenty of supply to promote. Pears are also plentiful now, and like apples, pricing is very reasonable and there are a number of opportunities to promote. The crop on both apples and pears looks to be large this year. Weather has been good and there seems to be no shortages of product in any growing region.

## CITRUS



### LEMONS

The lemon market is steady and has settled with some as the desert crop is going strong. There is good overall quality and some staining showing up along with some checkerboard color due to gassing. There is still some fruit crossing from Mexico and a few loads of Chilean still arriving which is causing a bit of a split market. The Mexico fruit is getting tired and showing fair amount of issues. The Chilean fruit is reported as having good quality.



### ORANGES

The orange market is steady as the crop as switched to new crop navels. The overall quality is good with some checkerboard color showing up as well as some spotting due to gassing the fruit to bring on color. The interior color and juice is good for this time of year, and sugars are a bit higher than normal with less acid. Good quality and plenty of volume are anticipate in the coming weeks.



### LIMES

Market has gotten stronger as the fall has progressed due to shorter suppliers and the rainy weather in Mexico. Despite the rain, quality has been good. All sizes are in good supply. Market is expected to continue strengthening as we head into the winter months.

