

FARMER'S REPORT

MARKET TRENDS | 10.4.2013



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BEEF

Overall demand for beef continues to be dull. Competing proteins continue to be the retail feature items. Typically, early October does not change the picture. Live Cattle traded late last week at \$126 CWT, up .02 from week prior.

ROUNDS

INSIDES: Prices are moving up. Retail has been featuring hard and pulled a lot of product out of the pipeline. We could see this trend for the next several weeks.

FLATS: Seasonal increases are taking place as demand increases as we trend into the fall months. Prices will continue overall steady to up for the next several weeks.

EYES: Steady to up is the normal trend going into early fall.

PEELED KNUCKLES: Steady market to up, same as the eye and flats.

RIBS

RIBEYES: The market has appeared to stabilize somewhat on the choice. The select heavies did move up, again possibly due to the wide spread from the choice to the select, making them more attractive. Many operators will switch from choice to select when the advantage is there, especially if it is for roasting, it will perform nicely. The light choice are fairly stable as well as the light select.

LOINS

STRIPS: The market overall is on the weaker side for both choice and select during this time of year with moderate fluctuations up or down in any given week. The next several weeks is an excellent time to utilize this cut as it is a favorable time period and at a discount to the rib eyes. As an example it makes a great item to roast in place of a rib.

TOP BUTTS: Overall, the projections are for weakness, with minor ups or downs any given week, on both choice and select. This is also a great time of the year to capitalize on a typical lower price point.

BALL TIPS: The market appears to have tightened up considerably and could shift prices up for the next few weeks. Some of this is due to shortened production numbers and with it taking well over 20 head of cattle to make up a box, this cut as well as many of the thin cuts is quickly affected and vulnerable to price increases.

TENDERLOINS: Choice tenders are called steady to up for the short term and larger increases as we get into early fall. The select have softened for the next week or two. The spread between the choice and select widened to the point that some users saw the big advantage and shifted to the select.

CHUCKS

CHUCK ROLLS: Chuck rolls are seeing seasonal increases, demand is strong, forward buys are being placed for features at retail. This is typical for the next few months.

CHUCK ROLLS: The market is consistent with chuck rolls.

THIN MEATS & GRINDS

FLAP MEAT: We are seeing some unexpected signs of strength, primarily due to the lighter production numbers. Moving forward we should start to see a little more stability but there are increases in the short term.

BRISKETS: The market will hold fairly steady at current levels, with minor normal slight up or downs at any given week.

GRINDS: Following a few weeks of seasonal adjustments we will see a more steady market at current levels, at least for a few weeks.

SKIRT MEAT: Outside skirts are seasonally at an attractive price point, however we do see it fluctuate up and down week over week. We are seeing them up this week with some larger pulls and packages. This trend will likely continue for the next month or two.



TURKEY

Buyers are now stepping into the market in preparation of Thanksgiving holiday. Buyers are stepping out front with their orders with no resistance to price. Both fresh and frozen breasts are showing heavy demand with short supply, while the whole birds has shown activity in forward buys through the retail sector with higher prices.

WHOLE TURKEYS: Market reported heavy demand from buyers in return taking pricing upward, the trend will continue through the first few weeks of November.

BONELESS RAW TURKEY BREASTS: Product has tightened up where buyers have placed their holiday packages. Continued pressure on breast meat will only take an upward march in price. Late orders being placed could have an effect to having the orders filled.



PORK

Base hog prices traded in the mid-to upper \$90s last week as packers look for animals. Hog weights running steady to slightly higher last week as cooler temps support increased weight gain.

Supplies of live hogs are expected to increase over the next few weeks. Typically, harvest numbers run in the 2.3 million head during fall season. This is the typical baseline for this time of year. Either way, lower harvest/supply numbers could support slightly higher prices for pork cuts during September and early October. Packers and processors are hopeful that slaughter numbers will return to the 2.3 million head range by mid October.

Cutout value moved higher on lower than anticipated supplies (due to packers reducing their slaughter numbers) and steady demand. Butts and loins are holding at last weeks price levels and bellies continue to move slightly higher. The pork cutout is expected to remain steady to slightly higher through this week, then gradually move lower mid October (as slaughter numbers increase).

LOINS

The markets for boneless loins moved higher as retail buyers secure product for October promotions. Bone in loin prices traded steady and are expected to trend lower mid October as demand tapers off and supplies increase.

TENDERS

Pork tenders moved higher this week on strong retail and export demand. Prices are expected to trade slightly higher early October then move lower late October.

BUTTS

The markets for bone in and boneless pork butts moved slightly higher on continued strong domestic and export demand. Markets are expected to move lower mid October.



RIBS

SPARE RIBS: Spare Rib prices traded steady to slightly higher on limited supplies of fresh product. Prices are expected to continue lower through October.

BACK RIBS: Back Ribs traded steady to slightly higher on limited supplies. Buyers are taking advantage of low price points for October features. Prices are expected to continue to trade lower mid October.

BELLIES/BACON

Bacon prices were higher this week due to low supplies of fresh bellies. Prices are expected to trade steady to higher through mid October then move lower late October.

HAMS

Ham prices traded steady as strong domestic and export demand continue to support current price levels. Lower than expected slaughter numbers along with increased demand for holiday hams should keep prices trading steady through late October.

TRIM

The following market dynamics will impact finished goods pricing in November. Pork Trimmings were steady this week but are expected to continue their seasonal decline. Both lean and fat trimmings are expected to continue moving lower through October due to decreased demand.

PICNICS

Pork Picnics traded steady this week on reduced slaughter numbers. Picnics are expected to find support at current levels as processors gear up for Oktoberfest sausage promotions.



POULTRY

The market is struggling to solidify itself starting out the new month. Demand patterns are no better than fair with mounting skepticism being heard that the first of the month draws may not live up to expectations. With ample bird weights and ideal growing weather ahs lead to extra kill days which is not helping the situation. Lower breast prices are drawing in buyers, but buyers are reluctant to chase after product unless the price is right. Tenders are starting to wobble with lower price points ahead.

WHOLE/CUT UP CHICKENS

With BBQ behind us, the whole and cut-up bird has seen pressure with less demand and pricing being quoted lower.

BONELESS BREAST MEAT

With lack of demand and back up inventories, the breast market is under pressure with lower prices recorded. The market is very close to the bottom of price and pricing should stable over the next few weeks.

CHICKEN TENDERLOINS

Market was reported steady this week. Industry chatter is that the tenderloin is position to lose strength in price and will travel downward in price.

MEDIUM WINGS

Football season is off and running and so are the wings. Prices remained steady from previous week, but all signs show increased pricing with heavy demand.

JUMBO WINGS

Heavy demand is reported on the larger wing but suppliers are keeping up with demand and prices remained steady from previous week. With seasonal demand in place, we do project higher prices going forward.

BONELESS SKINLESS THIGH MEAT

Thigh meat remained steady from previous week, but we are seeing signs of lower prices ahead of us. With exporting slowing down and BBQ season over projections are that we could see strong downside in price to keep inventories at the producer side.



DAIRY

BUTTER

Markets are continuing to rise, but this is still the lowest butter pricing seen since 2009 for this time of year. Seasonally, production is declining due to tightening cream supplies. Retail demand is building in preparation for the holidays. Export demand continues to be strong.

CHEESE

Markets are unsettled. Domestic demand is steady while exports continue to be strong. Milk production is seasonally lower, tightening supplies to cheese manufacturers.

SHELL EGGS

Markets are increasing this week, mainly driven by increasing retail demand.

FLUID MILK

Milk supplies are tight which leads to the seasonal low for production. Demand is strong. Markets are expected to continue to increase through the end of the year.



COMMODITY GROCERY

OIL

The weekly harvest update report showed soybeans at 3% complete compared to 21% last year and the ten year average of 11% complete.

Early numbers have soybean yields coming in slightly better than expected but it is too early to tell if that trend will continue as the harvest moves north. Traders continue to await more conclusive soybean yield data before committing to new positions.

European soybean traders have reported rumors that the import tax on biodiesel imports for Europe was double this week. This necessitates that they make their own, so rape oil has taken off, and we have seen both bean oil share and soybeans move lower this week.



SEAFOOD

SHRIMP, DOMESTIC

(WHITES AND BROWNS)

Headless and PUD Markets both reflected premiums with a few exceptions. While the atmosphere does remain calmer than a few weeks ago, there are still certain categories that continue to have short supply. These categories would be 26/30 ct and smaller brown shrimp, all counts of white shrimp, and PUDS of all sizes. On the PUDS, Strong raw material pricing and heavy buying continue to drive pricing upwards.

SHRIMP, IMPORTED

(BLACK TIGER AND WHITES)

Asian white shrimp continue strong across all categories, with some key sizes see increases this week. The tone appears to be somewhat steadier on white shrimp. Supplies on black tiger shrimp remain extremely limited and pricing remains very firm. Importers are slow to replace diminished stocks at the higher replacement costs, especially on larger size shrimp (16/20 ct and higher).

SHRIMP, LATIN – CENTRAL AMERICA

(WHITES)

The Latin American headless shell-on white shrimp market saw continued weakening this week after the repeal of the CVD duties that were imposed earlier in the summer. Demand is dull, especially on 41-50-61/70 ct. With firm replacement costs from South America and dull demand in the US we are seeing an unsettled market place.

SHRIMP, MEXICAN

(WHITES & BROWNS)

Limited offerings as the season has really just started. Ocean production continues. The marketplace is unsettled.



SCALLOPS

the market for domestic IQF remains full steady to firm this week with no changes. The Bay scallop market saw some increases this week in the 30/40 & 40/50 ct product out of Canada – supplies on these sizes are short of current demand.

TILAPIA

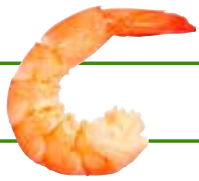
As was noted last week, tilapia prices are on the rise. We are approaching 5 year highs as we enter into the 4th quarter with a tighter supply situation. Word out of China is that they will be raising prices a minimum of 10% during the remainder of 2013. Part of the reason is the strong demand out of emerging markets such as the Middle East and Africa. As emerging markets take bigger shares of a tight supply, the result is higher prices for the U.S. Other contributing factors have been poor weather conditions this year, rising feed costs and pond rental rates. Another contributing factor is higher wages versus a year ago. In addition to price increases, we will also face shortages on the larger sizes, especially 7-9 oz, because of the cold weather in the Spring delaying the grow out season.



CATFISH

DOMESTIC CATFISH: The pond bank price for domestic catfish raw material remains high resulting in price increases in the market place finished goods. With less acreage devoted to catfish farming, supply is tighter – that along with the slower grow out season this year due to weather is resulting in a lower supply which is driving price upward.

IMPORTED CATFISH: Imported catfish replacement pricing is ticking up as exporters to the U.S. look at domestic pricing and ask more for their product. Overseas harvesting is just kicking into gear and replacement costs are definitely higher than current pricing in the U.S.



SEAFOOD (CONT'D)

STRIPED PANGASIOUS

(ALSO CALLED SWAI OR BASA)

Pricing remains steady to firm for the very near future. However, word out of Vietnam is that supplies are tightening which will cause price increases for the 4th qtr into 1st qtr 2014. In addition, the increased duty imposed by the Dept of Commerce as of Sept 9th will also be adding to the increased pricing. Expect price increases on pangasius as we enter into Lent.

SALMON

CHILEAN FARMED SALMON: The market remains steady with supplies fully adequate.

WILD ALASKAN SALMON: Net king markets both moved slightly higher this week with an adequate supply. Both net and troll cohos markets are firm. The rest of the Alaskan market remain unchanged.

WHITEFISH COMPLEX

(COD, POLLOCK, HADDOCK)

COD: Both Pacific and Atlantic markets are steady with good supplies on Pacific and great supplies on Atlantic. The lack of haddock and supply and resulting higher prices are starting to move up the replacement cost on Atlantic cod as users switch to Atlantic cod from haddock.

POLLOCK: The market continues steady after last week's slight upward adjustment on imported fillets – supply is fully adequate.

HADDOCK: The Haddock market took another increase in pricing this week. The price spread between skinless and skin on has tightened as small raw material causes a strain on small size skin on fillet supply. Quota cuts for 2013 are really starting to be felt in the market place with less supply and higher prices from overseas and in the spot market. Quota for 2014 will be cut another 10%. Raw material costs have risen significantly as suppliers fight to get the raw material available. Raw material costs are at 5 year highs.

SOLE/FLOUNDER

Large size sole or flounder fillets remain very tight in the market place leading to premium pricing on anything higher than 5 oz. Consider Alaskan plaice fillets as a substitute – it performs like flounder and has a more attractive price point.

TUNA, YELLOWFIN

Supply is abundant with many suppliers offering deals to move through large inventory positions. Many restaurants took tuna off the menu when prices hit some highs last year and many have been reluctant to put it back on the menu – thus the current supply situation.



MAHI MAHI

The market is barely adequate on 6 oz steaks with some premiums on price seen this past week. 8 oz portions remain firm. Conversely, 4 oz portions are plentiful.

HALIBUT

Market remains steady.

PASTEURIZED CRAB MEAT

Markets are steady for both fresh and pasteurized. Demand is fair to moderate on adequate supplies.

SNOW CRAB

CANADA: The market remains unchanged for a moderate to active demand.

Pricing remains firm.

ALASKA: Inventories are closely held on any 8+ or larger crab that has not yet been purchased.



KING CRAB

RED CRAB: The market for red crab remains relatively steady as suppliers move through last year's inventory in preparation for new season in Nov.

GOLDEN CRAB: 12/14 ct and smaller saw increases across the board this week. Supplies are adequate to barely adequate for a moderate to active demand.

OYSTERS

We continue to see premiums on fresh oysters while we await the Texas' grounds to reopen on Nov 1. The market remains firm for a barely adequate supply.

PRODUCE

POTATOES

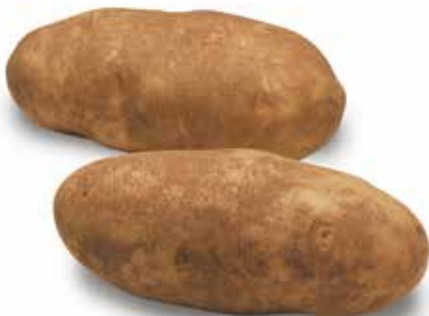
The market for cartons of Idaho **RUSSET POTATOES** has settled at current prices and the downward slide has stopped as growers start to put Russet Norkotah potatoes into storage. Harvest is in full swing in Idaho with rain causing some delays. Russet Burbank potatoes are starting to be harvested now, and some packaging facilities are running them off the field.

Russet Norkotah potatoes are currently the main variety being ran at packaging facilities in Idaho. Look for the Idaho market to keep the current prices for cartons with most packaging facilities running partial days. The overall russet potato market has stabilized over the last couple days and also reached the bottom.

There is still great availability of **YELLOW POTATOES** with great quality and competitive pricing. Most major shipping regions have available supplies to meet the average to above average demand for yellow potatoes.

WHITE POTATOES are seeing very steady pricing without much change to demand, as their movement is mostly limited to the Northeast. Both demand and pricing for **FINGERLING POTATOES** have remained steady, as there is both great availability and quality.

Demand for **RED POTATOES** continues to be very light in all growing regions, and prices remain the same for all sizes. Growers in Wash. and Wis. both have available supplies, while those in Minn. are hoping to finish shipping by Oct. 14. Harvest in Colo. has been delayed by weather, so the movement of those red potatoes is slow, but growers are about halfway done harvesting there. Red potato growers in Idaho have a similar situation with weather delays and are also slow to ship their supplies. The Red River Valley in N.D. is reporting average yields, and the region is in full harvest of their red potatoes. The quality of red potatoes is better than last year; however, it is very dry, so growers are hoping for rain to prevent damage to the potatoes.



PRODUCE

VEGETABLES



LEAF LETTUCE

The leaf market overall is steady. Romaine supplies are unusual right now. The gap in pricing can be as much as two dollars amongst the different shippers. The green leaf availability is good as this market is down, overall. There continues to be arrival issues that include tip and fringe burn. Romaine Hearts will be moderate in availability for the week. Red leaf is stable as well. Weight 35 to 38 on liner romaine.



ICEBERG LETTUCE

This market is stronger with all suppliers. Supplies are expected to be light for the rest of the week. There continues to be quality issues including tip burn, some mechanical damage, and pink ribbing. Again, pricing gaps are occurring up to three dollars depending who the shipper is. Some suppliers are ahead of fields trying to keep up with demand. This has caused lighter weights to occur. Weight 46 to 48 on liner lettuce.



ONIONS

The yellow market is steady but the availability is lower than we would like due to recent rain. The biggest issue with the rain has been the harvest delays. Washington is producing jumbo & medium yellows while Idaho/Oregon is peaking on jumbos. Colorado is packing yellows again and they are also heavier to jumbos but the availability is light. Red onions are steady to slightly higher. Washington still has the most volume on red onions. Whites are steady in both districts and on all sizes. The quality has been good on all colors in Washington, Oregon, Idaho, and Colorado.



TOMATOES

The round tomato market is level this week as additional supplies from the east enter the market place. There is still a shortage of big size fruit, with pack outs very heavy to 6x7 sizes. This is causing a bigger spread than normal in the market between sizes.

Roma tomatoes are scarce out of all growing regions. The Eastern shore does not plant an early fall crop of roma's. The rain in Mexico has knocked growers out of production for a several days; the summertime regional growing areas are winding down, leaving Central California to supply the brunt of the demand of the country.

Grape and cherry tomatoes markets are being pressured down with some additional supplies showing in both the east and the west. The market price still remains higher than normal.

With Mexico beginning production of hothouse beefstake and on-the-vine tomatoes, this is putting pressure on the Canadian market. We are starting to see a slight rise in the Canadian beefstake market as the back log of supplies are cleaning up and lighter production due to less day light hours and cooler temperatures in the growing area.



CUCUMBERS

The market continues tight. Suppliers are crossing over from Nogales. Quality is good. In the East, the market is stable; however, demand is on the uptick. Michigan is still producing but the first freeze can happen at any time and will turn this market upside down. The Carolinas continue to produce supplies. Georgia is producing product. Overall quality is good.



EGGPLANT

In the West, the market appears to be settling. Supplies continue to be light and demand high. Again, there is a wide range of quality among suppliers. In the East, the market is stable, but is trending downward. Quality and demand is good. Product is being harvested out of North Carolina and Georgia.

PRODUCE



BELL PEPPERS

Green Bells in the west are slightly higher. Southern California is producing mostly larger fruit. Red Bell prices are slightly up and supplies are tighter. Demand exceeds supply. No quality issues are reported. Out East, supplies are getting better. Quality is good. The green market is stable. The Red Bell market is showing a little strength. Yellows are limited.



CHILE PEPPERS

Cooler weather continues to have an effect on product out of Northern California. Product is now coming in at smaller sizes. Mexico products are still coming in at their volume peak. The weather is improving, so look for this market to get stronger as the week goes on.



SQUASH

In the West, the market is firm on both Yellow and Italian squash as well as hard squash. Cold weather has affected production. Demand is increasing. In the East, the market is steady. Demand is somewhat soft. The market is fragmented with product being harvested in Michigan, New Jersey, Quincy, and Southern Georgia.



CABBAGE

The market is strong. Supplies are limited, particularly on Green Cabbage. Demand is strong. Quality is good. Product is primarily being harvested out of North Carolina.



BROCCOLI

Broccoli is higher over last week. Supplies overall are limited, particular on Crowns. Demand exceeds supply. Salinas and Santa Maria are main areas of production. There are no reports of quality issues.



CAULIFLOWER

The market is up to start the week. The market is only expected to get stronger throughout the week. Supplies continue to be moderate out of Salinas and Santa Maria. No quality issues reported.



CARROTS

The market is steady. Jumbo's availability is steady, but somewhat limited. Quality is good..



CELERY

The market is stable. Supplies are anticipated to be moderate at best out Santa Maria and Salinas. No issues with quality are being reported.



GREEN ONIONS

The market is steady. Mexico had experienced rains, but production is back on track. California and Mexico seem to be the major sources of product. Supply and Quality is good.



ASPARAGUS

The market is slightly higher. Supplies out of Mexico have tightened up a little. However, there are good sizing on Standards and Larges. Quality remains good overall. Peruvian product continues to be moderate with good quality.



GREEN BEANS

The market is steady, but active. Supplies are getting better. Quality is good. Production will start out of Georgia soon.



GARLIC

This market is unsettled and shaky. Prices among suppliers vary dramatically. Demand outpaces supply.



BERRIES

STRAWBERRIES

The strawberry market is steady to slightly firmer with lighter demand and moderate supplies. Supply is slowly winding down out of Northern California while Southern California supply is slowly increasing. Harvest quality has picked up from the previous week. Expect demand to remain steady. The market price for strawberries varies based on area and quality. Some shippers are expected to curtail harvest in the next couple of weeks or earlier if there is any significant rain. The strawberry markets are up.



BLACKBERRIES

Blackberries are of average quality, medium size, fairly firm with some diaper damage. Supplies are down from last week. Mexican volume is expected to pick up in the coming weeks. The blackberry markets are higher.

PRODUCE



RASPBERRIES

Raspberries are fairly firm, medium size with minimal diaper damage. Demand is stable and there are no interruptions in supply. The raspberry markets are slightly lower and pricing is expected to remain level for the next few weeks.



BLUEBERRIES

Blueberry markets will remain firm as supplies are winding down out of Oregon, Washington, and Michigan. Watch for the market to strengthen over the next couple weeks as new districts begin shipping. Demand is good and blueberries are arriving from Argentina. The blueberry markets are up with stronger prices.



GRAPES

The market on red grapes is higher with good demand and large fruit. The green grape market is steady with supplies being plentiful and persistent demand. Sizing on greens is starting to improve. Expect to see the green seedless market start to perk up. Black seeded grapes have excellent quality, good availability, and the market is creeping up. Grape harvest continues to wind down for the season. The grape markets are stronger and up.



PEARS

Bartlett pear demand is good and sizes are running large. Bosc pears are in swing and Anjou pears are also being harvested. Red crimson pears are available and so are some specialty pears. The pear markets are steady.



STONE FRUIT

The California stone fruit season has a limited amount of time left. Yellow nectarines are finished, and most shippers are expected to be done harvesting yellow peaches very soon. Red and black plums are expected to be available through October. There are no changes in the stone fruit market.



APPLES

Higher than normal temperatures have slowed the harvest of new apple crops. The Golden Delicious market remains soft. New Granny Smiths are being harvested and prices are holding strong. Washington Gala pricing has come down a little bit. There are plenty of Red Delicious apples in the market, and the same goes for Fuji apples. The supply of Honeycrisp is up and prices are relaxing accordingly. Braeburn harvest should begin next week. Cripps Pink apples have a targeted start date of October 10th. Pink Lady apple harvest should start soon as well. In Michigan, Paula Reds done, Ginger Golds are still going strong, while Gala, Jonathon and McIntosh apples are running. Michigan Honeycrisps are ramping up. In New York, Ginger Golds, Macs, Galas, Honeycrisp, Empire and Courtlands are going strong, while Reds, Golds and Jonagolds should be starting in about a week. There are no changes in the apple markets.



TROPICAL

PINEAPPLES

There have been some improvements in Mexican pineapple import volume, and Costa Rican imports are expected to increase as well. Fruit size is trending large. The market is slow at this time and the entire month of October is expected to have low demand. The pineapple markets remain steady.



BANANAS

Banana demand is steady and expected to rise in the next couple weeks. Quality is good and supply is very good. The banana markets are steady.



AVOCADOS

Demand for avocados is stronger than supply, domestic volume is declining, Mexican harvest is slow, and Chilean import volume has increased only slightly. Volume is expected to pick up this month while demand remains level. Anticipate pricing to remain relatively steady for most sizes.

PRODUCE

CITRUS



ORANGES

Demand for oranges continues to outreach available supplies. Some fruit is beginning to re-green but is still ripe. Fancy to choice ratio at this time is three to two. The season is expected to come to an end mid-month, and November is projecting larger oranges. Texas navel harvest may begin next week. The overall quality of the Valencia's is fair to good, the skin is showing some softness and a fair amount of scarring is present. The interior quality is still excellent, however. Chilean navels are available and this year's upcoming domestic crop is expected to be down from last year's. Increased wind scar may result in lower than normal volumes of fancy grade. The orange markets are active and up slightly.



LEMONS

Demand exceeds supply on all sizes of lemons from all shippers. The Ventura crop is done and new crops from Coachella and Yuma have just begun. Volume is expected to remain short until the end of the month. Mexican import volume is limited and expected to remain this way throughout the season. Sizes are trending smaller. Currently there is minimal fruit being picked in Florida. The lemon markets are active, but flat.



LIMES

Limes are currently being imported in better volumes. Good supplies are expected for the next few weeks and pricing should remain level or loosen up a little. The lime markets are lower.



GRAPEFRUIT

The Marsh Ruby is expected to remain available through the middle of October and Texas Grapefruit is expected to start mid-month. Heavy rains should result in good sizing and good volume throughout the year. The grapefruit markets are steady.

MELONS



CANTALOUPE/HONEYDEWS

Cantaloupe supplies are down while demand remains strong. Overall quality is good, but the sugar and maturity of the melons is less than desirable; this is expected to improve as the season advances. Sizing is trending towards smaller cantaloupe. Most growers have finished up their Honeydew fields and imports are not expected until next month. Honeydew quality is excellent with a nice cream to green exterior and excellent sugar and internal firmness. Supplies of honeydews are beginning to fall off. The honeydew market is strong and should remain so for the near term. Cantaloupe quality is only fair, but honeydew quality is good to excellent. The cantaloupe and honeydew markets are active and higher.



WATERMELON

Supplies of watermelon are currently tight while demand remains above average. Domestic harvest is slowing down, and imported Mexican melons have slowed as well. Sizing has dropped off and the markets are expected to increase. Volume is not projected to increase until the end of the month. The watermelon markets are volatile and higher.

