



# FARMER'S REPORT

MARKET TRENDS | 10.11.2013



# 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, steady from the week prior. With the government shut down affecting the USDA reporting arm, it is creating more of a challenge in predicting future trends.

## ROUNDS

**INSIDES:** Prices are starting to stabilize, possibly peaking for the short term. 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 ribs are up in price this week. Packers appear to be well sold. Overall it looks like the trend will be upward as we get into late October.

## 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. This cut as well as many of the thin cuts is quickly affected and vulnerable to price increases as the production numbers move up and down.

**TENDERLOINS:** Choice tenders are called steady to up for the short term and larger increases as we get into early fall. The select are experiencing sharper increases in the short term. The spread between the choice and select has narrowed.

## 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 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 were reported steady to slightly higher this week as packers are looking for hogs for weekend harvest. Hog weights running steady to slightly higher this week as temps cool and feed quality improves.

Lower than expected harvest numbers remain an ongoing concern as these numbers continue to trend below year ago levels. Typically, harvest numbers run in the 2.3 million head during fall season. This is the typical baseline for this time of year. Packers and processors are anticipating that slaughter numbers will return to the 2.3 million head range by late October.

Cutout values are trending lower early week as buyers paused to gain more insight into current market price levels. Butts and loins are holding steady to slightly lower and bellies continue to move slightly higher. The pork cutout is expected to remain fairly steady through next week, then gradually move lower late October (as slaughter numbers increase).

## LOINS

The markets for boneless loins traded steady to slightly lower on weaker short term demand. Bone in loin prices traded steady. Loin prices are expected to trade sideways to slightly lower through early November.

## TENDERS

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

## BUTTS

The markets for bone in and boneless pork butts moved lower on lackluster demand. Prices are expected to trend lower through late October then trade steady into early November.

## RIBS

**SPARE RIBS:** Prices traded steady on weaker product demand. Prices are expected to continue lower through October and are expected to reach seasonal lows.

**BACK RIBS:** Traded steady to slightly higher on limited supplies. Buyers continue to take advantage of low price points for October features. Prices are expected to continue to steady through October.



## BELLIES/BACON

Bacon prices will be higher next week on strong retail and foodservice demand. Belly prices are expected to trend higher on continued strong product demand in the short term. Prices are expected to trend lower during October and into the November time frame.

## HAMS

Ham prices traded steady to slightly higher on strong domestic and export demand. Lower 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 to higher this week on strong demand for dinner sausage due to October retail features. Prices are expected to trend lower late October through the end of the year.

## PICNICS

Pork picnics traded higher this week on strong retail demand for dinner sausage. Picnics are expected to trade steady then move lower through early November.



## 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 in 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 the 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 beginning to show some signs of weakness, but demand both domestically and internationally remains strong.



### CHEESE

Markets are unsettled. Domestic and international demand is stronger than expected, but supply is good.

### SHELL EGGS

Markets have settled, which is typical for this time of year. Expect increases for the last two months of the year.

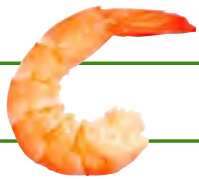


## COMMODITY GROCERY

### OIL

The last USDA report released just prior to government shutdown was considered bearish. The soybean complex as the September 1, 2013 soybean stocks were reported at 141 million bushel, 17 million higher than the average trade estimate. The 2012 production number was raised by 18.6 million bushels, leading to the higher than expected stocks figure.

Due to the shutdown we will not have the weekly exports sales updates to report. Traders are concerned that we may not get the supply/demand report scheduled for Friday, October 11th until much later. With the government shutdown and delays on upcoming USDA reports, this leads the market limited on facts and long on rumors. Currently, the USDA soybean crop was rated at 53% good to excellent; this is just below the 5 year average of 55%.



# 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 US. 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.

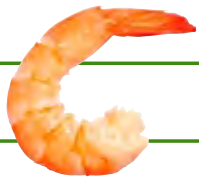
## CATFISH (DOMESTIC & IMPORTED)

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 replacement pricing is ticking up as exporters to the US 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 US.







## SEAFOOD (CONT'D)

### STRIPED PANGASIU

(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 5oz. 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 6oz steaks with some premiums on price seen this past week. 8oz portions remain firm. Conversely, 4oz 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 November.

**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 November 1. The market remains firm for a barely adequate supply.

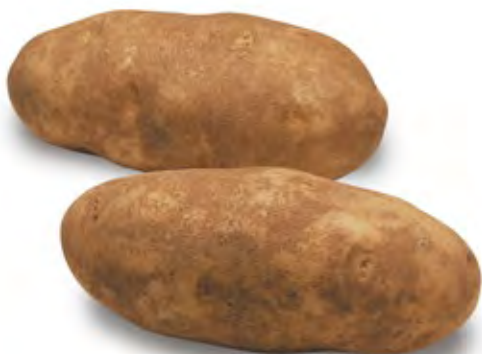
# PRODUCE

## POTATOES

The market for cartons of Idaho **RUSSET POTATOES** has been steady, including No. 2 potatoes. Larger cartons of Idaho russet potatoes are steady, and shippers are seeing a larger profile in the crop they are currently packing. Shippers have slowed down the run time of the crop by running partial days at packaging facilities as growers begin to put their crop into storage. Idaho's Russet Burbank potatoes have limited availability, and Russet Norkotah potatoes are the main variety being packaged. Grower yields and quality in Idaho have been average going into the storage season with good fall weather for harvest. The industry-wide demand for russet potatoes is very steady.

There is good availability of **YELLOW POTATOES** throughout the industry, and the pricing has remained very steady. The availability of white potatoes is concentrated in areas where the demand is in the Northeast. There is a limited supply of **WHITE POTATOES** grown in the Midwest, although most of the product ends up in the Northeast. The movement of **FINGERLING POTATOES** continues at a very steady pace, and the quality continues to be very beautiful.

The size profile for **RED POTATOES** continues to be larger, so the B-size market will continue to be strong, while as a whole, the market is going to stabilize. Red potatoes are available out of Wash. and Wis. with good demand. Meanwhile, growers in Minn. are planning to finish their harvests by Oct. 11. Red potatoes are being slowly shipped out of Colo. and Idaho, where harvest is 80 percent and 50 percent complete, respectively. Growers in the Red River Valley of N.D. are also in full harvest and reporting average yields, excellent quality and a large size profile for their red potatoes. The area recently received some much-needed rain, which is helping the harvest.





# PRODUCE

## VEGETABLES



### LEAF LETTUCE

Markets are up due to fluctuations in weather patterns have dictated the overall quality and supply of leaf lettuce grown in the Salinas Valley, California. Looking back to a few weeks ago where mildew pressure was the main issue in all leaf crops, this week the mildew has met temperatures exceeding eighty degrees and is creating a bad mix of issues for growers. Starting with romaine, mildew pressure as well as heat damage are all being reported, and this is the direct reason romaine crop is so tight this week. Coupled with the warmer weather and demand for romaine because Canada and the east coast were hit with inclement weather earlier this year, the Salinas region is really under pressure to fill supplies to east coast markets as well. Green leaf quality is reported to be fairly good, yet light weight cartons at few shippers show evidence of trimming outer leaves to remove mildew spotting. Red leaf lettuce still seems to be holding on with good supply and quality is reported to be good as well, but with a closer look, mildew spotting and the occasional fringe burn is evident. Weight 35 to 38 on liner romaine.



### ICEBERG LETTUCE

The iceberg market is red hot right now on the west coast due to weather-related quality issues, lack of nationwide local product, and increased demand now that schools are back in. The bin processors are still very short on supply and are offering top dollar for acreage. Conventional carton shippers are leaving a lot of product behind due to weak tip, mildew and other heat-related issues, and as a result many are sold out after covering contracts. Weights are light to average. Expect this tight market to continue through the Huron, California and Yuma, Arizona transition, and possibly beyond. Weight 46 to 48 on liner lettuce.



### CABBAGE

The market continues to be elevated. Supplies have improved across all regions. But, overall, supply is poor. Some Texas growers are harvesting supplies. Demand remains steady. Product continues to be harvested out of North Carolina. No quality issues reported.



## TOMATOES

The market has strengthened due to the overall supply of tomatoes is lower this week with a bit better demand that comes with the beginning of the month. The rain in the southeast over the weekend has pushed some eastern buyers back to California for fruit, which has allowed shippers to clean up their back log of tomatoes. Quality is all over the board in California, with most all growers' fruit showing some signs of distress from one field to the next. This appears to be the last week of reasonable priced tomatoes with the weeks ahead looking to allow for increases in pricing until mid-November. As we move through the month of October each week various growing operations will conclude production for the season until we are left with Florida and Baja. With yield issues projected in Florida due to disease and Baja much lighter due to rain, supplies are projected to be tight until South Florida begins production.

Roma tomatoes will remain short through the month as well, with Central California limited in supplies for the remainder of the season along with smaller sizing projected. Mexico has the jumbo and extra large size fruit, but with crops distressed due to the storms in late September, there appears to be no flush of fruit coming anytime soon from the area.

As the transition of crops occurs from Virginia back to South Carolina and Florida, we are seeing a strengthening in the grape and cherry tomato markets. Much like rounds, these varieties are expected to rise in price as we move through the month of October.

The flush of on the vine tomatoes out of Mexico continues to hold the cluster market at a very low trading level both on Mexican and Canadian fruit. The hothouse beefsteak market is firming up with most supplies still coming out of Canada.



### EGGPLANT

No major changes here. In the West, the market is settling. Supplies are still light and demand is strong. Again, quality varies among supplier. In the East, the market continues to be stable. Supply, quality and demand are good. North Carolina and Georgia are production areas.



# PRODUCE



## ONIONS

The western market for onions is still showing strength due to lingering rains. Growers are hurrying to finish harvest, as they are behind schedule. As with any rain, growers are keeping an eye on the quality of their onions, especially the red and white varieties. Once the onions are being shipped out of storage, we should see more consistent quality. Growers should wrap up harvest within the next two weeks, as they need to get the crop indoors before the temperatures become too cold.



## CUCUMBERS

The West market is unsettled a little. Baja supplies are light. Better volume on Mexico supplies crossing through Texas Valley and Nogales. Demand is outpacing supply. There are reports of quality issues. In the East, Georgia and the Carolinas volume is light as growers move out of older fields. Watch for quality issues as growers move out of older fields. Northeast and Midwest production season is pretty much done, with the exception of Michigan, which is anticipated to experience a freeze over the next couple of weeks.



## BELL PEPPERS

In the West, the market is steady, particularly on Green Bells. New lots are coming on which is improving supply. Red Bells continue to be tight. Demand continues to exceed supply. No quality challenges. Out East, supplies out of Michigan have tightened. Look to prices to increase as Michigan winds down. No quality issues reported.



## CHILE PEPPERS

The market is steady. Due to cooler weather, lighter volumes are coming out the northern region of California. The Baja region of Mexico is still producing; however, the region is going into the last few weeks of production. Therefore, keep an eye on quality. Habaneros and Tomatillos are very limited. Product is starting to come out of the Texas Valley, with good quality. Out East, the volume and quality on Chili Peppers have been good. Michigan and Ohio are done for the season. Georgia's Chili Peppers are slow to come on, but is anticipated to pickup.



## SQUASH

In the West, the market remains slightly up on both Yellow and Italian squash as a result of the cooler weather slowing production. Demand remains strong. In the East, anticipate this market to be slightly up. Michigan has wrapped up production. Central Florida has experienced heavy rains, which has limited production. Overall, supply is expected to be light throughout the week on both Zucchini and Squash.



## BROCCOLI

Broccoli continues to be very challenging. Prices are higher over last week, particularly on Florets. Supply is extremely tight. It is expected to affect process items. Demand continues to outpace supply. Production areas remain Salinas and Santa Maria. Quality is suspect.



## CAULIFLOWER

This market is higher over last week as well. Supplies are very tight. Demand outpaces supply. Supplies are light out of Salinas and Santa Maria. Quality is suspect.



## CARROTS

The market continues to be steady. Supply on Jumbo is good. Quality is good.



## CELERY

The market is experiencing a slight uptick due to demand. Supplies are at normal levels. Production is good out of Santa Maria and Salinas. Quality is good.



## GREEN ONIONS

No change here. The market continues to be steady. Mexico's production is back on track after experiencing challenging weather. California and Mexico continue to be the major sources of product. Overall, supply and quality is good.



## ASPARAGUS

The market is higher. Baja has finished earlier than anticipated. Product is being pulled from Peru, with various fields opening and closing. The West Coast is pulling supplies from the East Coast to feed demand. Demand is up. No reports of quality issues.

# PRODUCE



## GREEN BEANS

The market is slightly low, but steady. Supplies continue to improve. Virginia's volume remains good. Georgia has started with light volumes and is anticipated to pickup over the next couple of week. Out West, volume is short, and the market is active. Quality is good.



## GARLIC

This market remains unsettled. Again, prices among suppliers vary, and demand continues to exceed supply.

## BERRIES



### STRAWBERRIES

Supplies are up from expectations and quality has also improved. Production out of Southern California is ramping up, while that in Northern California is slowing down. Volume is expected to improve moving forward. Mexican production is targeted to start by November. Quality, however, is still an issue for the berries. Pricing should remain constant for the next few weeks as the market is flat.



### BLACKBERRIES

California production is almost done and Mexican import season is slow to develop. Mexican import volumes will be down this fall season. Pricing is to remain constant for the next few weeks.



### RASPBERRIES

Mexican raspberry volume is increasing steadily. Supplies are good and pricing is to remain level for the next several weeks.



### BLUEBERRIES

The domestic blueberry season is done with no reports on the USDA Market News. Quality on the domestic holdover crop is fair. The South American crop is slow to begin and the market is trending up as a result. Current imports are slow and in small quantities, but should improve by the end of the month. Quality is only fair. The market is short and heavy prorating is prevalent. Pricing is firm, but expected to drop once imports arrive in good supply.



## GRAPES

Grapes out of the central valley continue to be harvested in good volume. Both sizing and quality have been excellent this season. Harvest has transitioned to late season varieties of red seedless, green seedless and blacks. Market pricing is slowly increasing on the reds. The black seedless market is creeping up as well because the autumn crop is lower than expected. The grape market is steady to strengthening especially for green grapes.



## APPLES

Temperatures have cooled off, harvesting has slowed, and this year's apples are looking larger than last. The Golden Delicious market is steady as shipments have slowed. The Granny Smith market is stable with inventories building. The Gala Market is steady as harvest is all but done. The Red Delicious market is steady as there are plenty of apples left in storage. The Fuji market is steady and the Honeycrisp market is getting softer. Braeburns have just started and Cripps Pink apples are projected to start next week. In Michigan, Golds, Galas, Jons, Cortlands, Macs and Honeys are all available. In New York, Ginger Golds, Macs, Galas, Honeycrisp, Empire and Cortlands are going strong while Reds, Golds and Jonagolds are just starting. The overall apple market is steady.



## PEARS

The Bartlett pear market is softening on larger sized fruit with smaller sizes tighter. Same with Anjou which are running large in size. The Bosc market is steady. The overall pear market is steady as well.



## STONE FRUIT

The California stone fruit season has a limited amount of time left. Nectarines are finished, and most yellow peaches are almost done. Red and black plums are expected to be available into November. Imports are expected to be slim as a major freeze has affected the crops out of Chile. The stone fruit market is relatively stable, but winding down.

# PRODUCE

## TROPICAL



### PINEAPPLES

Mexican import volume will continue to improve as the season progresses. Costa Rican volumes continue to be light but are expected to increase later in the Fall. There are no changes to report in the pineapple market.



### BANANAS

The banana market is down slightly as the boom in apple crop this season has lowered demand. The government shutdown has also put downward pressure on this market.



### AVOCADOS

Demand is strong and the market is steady on avocados. Pricing has dropped. Import volume is expected to increase over the next few weeks. Availability of fruit is better than it has been the past four weeks. Chilean imports have hit the market, but are said to be premature. The avocado market is up.

## CITRUS



### ORANGES

The volume of Valencia oranges is tight on all sizes and the fancy to choice ratio is three to two. The season is expected to come to an end in a couple more weeks, with the Navel season kicking off later this month. Larger fruit is expected for the remainder of the year, and as a consequence demand is exceeding supplies on smaller fruit. The market is steady to firm on all sizes. The overall quality is good to fair with some soft fruit as well as a tinge of green. The navel outlook is 15% lighter than last year's crop. The orange market is steady.



### LEMONS

Demand is exceeding supplies on all sizes from all shippers. Light volume has started out of district three while volume out of district one is expected by the end of the month. Import volume out of Mexico is low, but expected to increase over the next few weeks. The good news is that the new crops and the imports are seeing better quality. Serious relief is expected to be underway by mid-November. The lemon market is flat.



### LIMES

Imported limes are seeing heavier volume and quality has remained good. Expect pricing to remain steady for the upcoming week and then possible loosen later in the month.



### GRAPEFRUIT

The Marsh Ruby will be harvested for the remainder of the month, while Texas is expected to start picking the week of October 14th. Heavy rains have led to expectations of good volume and good sizing. The grapefruit market is flat.



## MELONS

### CANTALOUPE/HONEYDEWS

The Cantaloupes and Honeydews in California will be ending in the very near future. Supply is light, but production has been better as temperatures warmed up recently. Honeydews out of Arizona have started to ship while Arizona cantaloupes are still two weeks away. Supply should ramp up here in the near future coinciding with the new crop harvest. Georgia melons are in the mix as well, and imports are not expected until November. The cantaloupe and honeydew markets are strong and the condition of melons has been good to very good. The cantaloupe and honeydew markets are up.



### WATERMELON

Watermelon supplies are tight. There are only small quantities of melons out of Michigan, Indiana, Delaware and North Carolina. Texas and California have fruit for the next few weeks, and Mexico will have fruit crossing after that. Florida and Georgia will have a small crop this month as well. Sizing has dropped off and pricing has increased. The watermelon market is up.