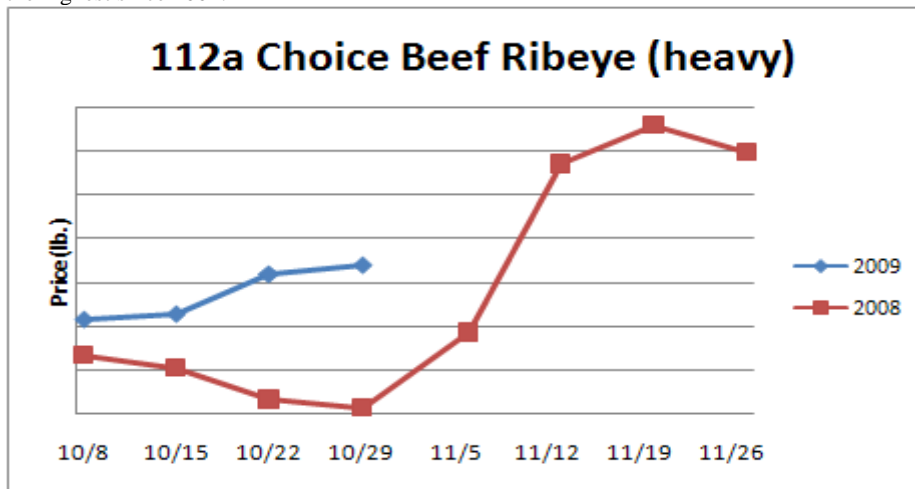


Beef, Veal and Lamb Report

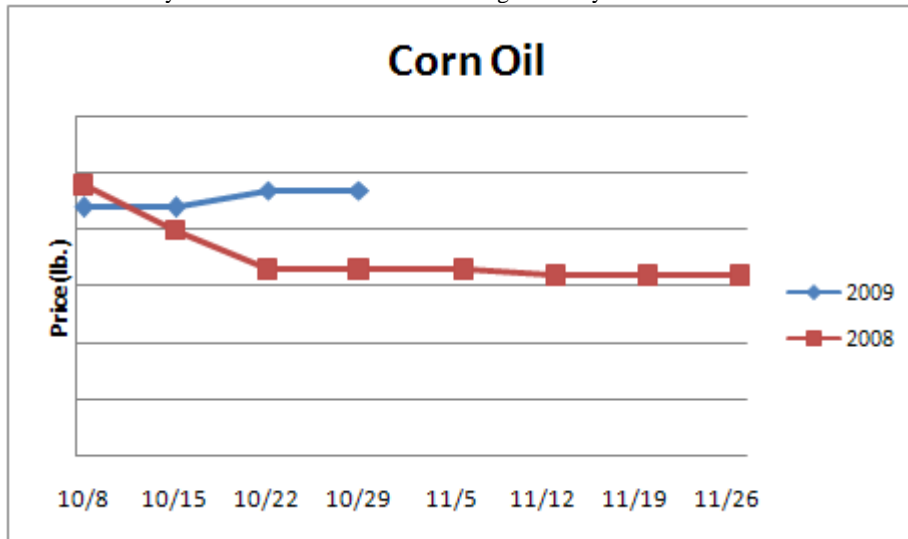
Beef, Veal & Lamb- Beef output last week rose 2.7% and was 1.9% larger than 2008. Beef output is forecasted to trend 2.5% below the prior year levels during the next six months. The tenderloin and ribeye markets have mostly moved upward over the past week due to building holiday season demand. Seasonal charts indicate that further beef ribeye and tenderloin price increases are likely next month. An increase in dairy cow slaughter could help depress the 90% beef trimming market in November. The percentage of cattle grading prime for the week ending October 13th was the highest since 2004.



| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|---------------------------------|---------------------|-----------------|----------------------------|
| Live Cattle (Steer) | Increasing | Good | Lower |
| Ground Beef 81/19 | Increasing | Good | Lower |
| Ground Chuck | Increasing | Good | Lower |
| 109 Export Rib (choice) | Decreasing | Good | Higher |
| 109 Export Rib (prime) | Decreasing | Good | Higher |
| 112a Ribeye (choice) | Increasing | Good | Higher |
| 112a Ribeye (prime) | Decreasing | Good | Higher |
| 115 Chuck, 2-piece (choice) | Decreasing | Good | Lower |
| 120 Brisket (choice) | Increasing | Good | Lower |
| 121c Outside Skirt (ch/sel.) | Decreasing | Good | Lower |
| 167a Knuckle, Trimmed (choice) | Increasing | Good | Lower |
| 168 Inside Round (choice) | Decreasing | Good | Higher |
| 174 Short Loin (choice 0x1) | Increasing | Good | Higher |
| 174 Short Loin (prime 2x3) | Decreasing | Good | Higher |
| 180 1x1 Strip (choice) | Increasing | Good | Higher |
| 180 1x1 Strip (prime) | Decreasing | Good | Lower |
| 180 0x1 Strip (choice) | Decreasing | Good | Higher |
| 184 Top Butt, boneless (choice) | Decreasing | Good | Higher |
| 184 Top Butt, boneless (prime) | Decreasing | Good | Lower |
| 185a Sirloin Flap (choice) | Increasing | Good | Higher |
| 185c Loin, Tri-Tip (choice) | Increasing | Good | Higher |
| 189a Tender (select, 5 lb & up) | Increasing | Good | Higher |
| 189a Tender (choice, 5 lb & up) | Increasing | Good | Higher |
| 189a Tender (prime, heavy) | Decreasing | Good | Lower |
| 193 Flank Steak (choice) | Increasing | Good | Higher |
| 50% Trimmings | Increasing | Good | Lower |
| 65% Trimmings | Increasing | Good | Lower |
| 75% Trimmings | Increasing | Good | Lower |
| 85% Trimmings | Increasing | Good | Lower |
| 90% Trimmings | Decreasing | Good | Lower |
| 90% Imported Beef (frozen) | Decreasing | Good | Lower |
| Veal Rack (Hotel 7 rib) | Steady | Good | Lower |
| Veal Top Round (cap off) | Steady | Good | Lower |
| Lamb Rack 7 & up | Decreasing | Good | Lower |
| Lamb Leg (trotter off) | Decreasing | Good | Higher |

Oil and Grains Report

Oil & Grains- The corn and soybean harvests remain behind but should improve in the coming weeks with better weather. The soybean and corn markets are moving modestly downward.

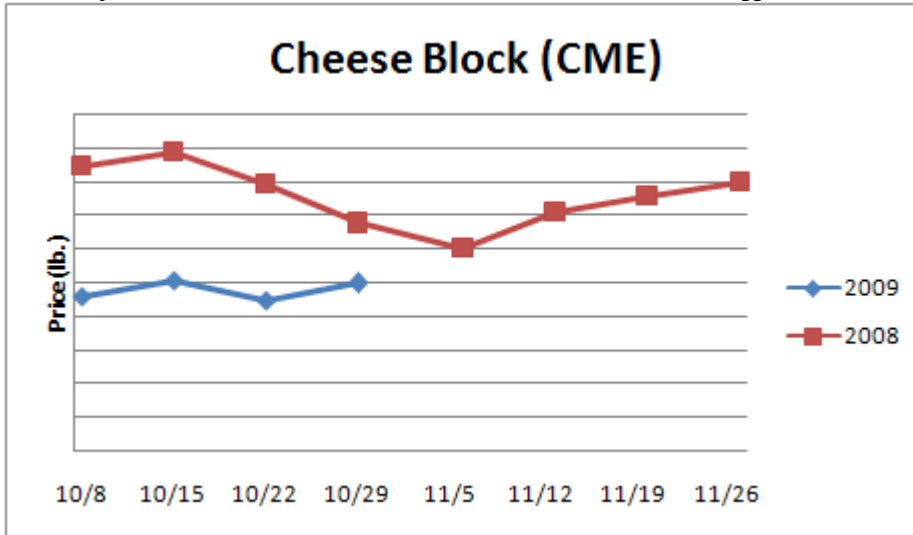


| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|-----------------------------------|---------------------|-----------------|----------------------------|
| Soybeans | Decreasing | Good | Higher |
| Crude Soybean Oil | Decreasing | Good | Higher |
| Soymeal | Increasing | Good | Higher |
| Corn | Decreasing | Good | Lower |
| Crude Corn Oil | Steady | Good | Higher |
| Distillers Grain, Dry | Increasing | Good | Lower |
| Crude Palm Oil | Decreasing | Good | Higher |
| Hard Red Winter Wheat | Decreasing | Good | Lower |
| Dark Northern Spring Wheat | Decreasing | Good | Lower |
| Canola Seed | Decreasing | Good | Higher |
| Canola Oil | Steady | Good | Higher |

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Dairy Report

Dairy- September 30th American cheese stocks were 10% bigger than a year ago and the largest for the month since 1986. The CME cheese markets have returned to the \$1.50 area but the markets could struggle to move notably upward from here. The CME cheese markets have not traded above \$1.50 since December of last year. The butter market is firming as demand begins to build for the upcoming holiday season. Further butter market increases may occur. September butter stocks were 23% more than 2008 and the second biggest for the month since 1993.

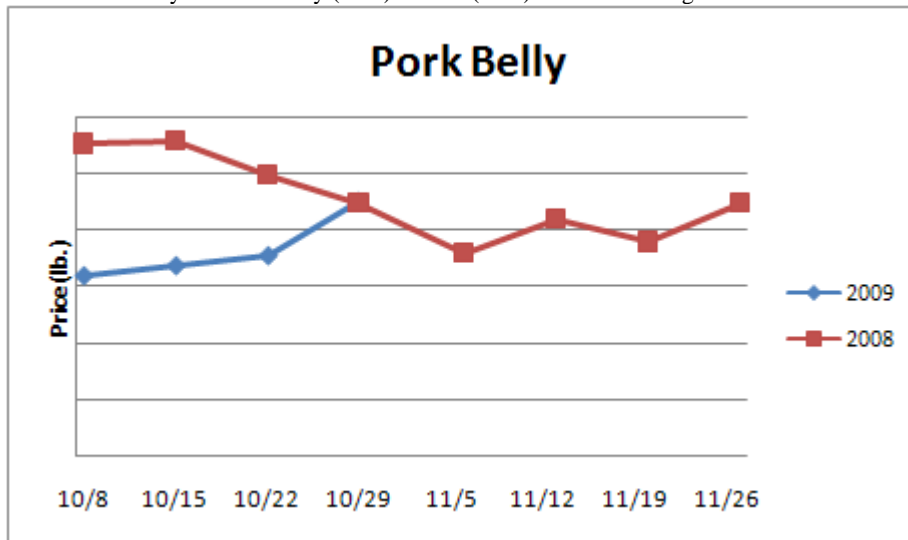


| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|-------------------------------------|---------------------|-----------------|----------------------------|
| Cheese Barrels- CME | Increasing | Good | Lower |
| Cheese 40 lb Blocks- CME | Increasing | Good | Lower |
| American Cheese | Increasing | Good | Lower |
| Cheddar Cheese | Increasing | Good | Lower |
| Mozzarella Cheese | Increasing | Good | Lower |
| Provolone Cheese | Decreasing | Good | Lower |
| Parmesan Cheese | Decreasing | Good | Lower |
| Butter- One lb Solids | Increasing | Good | Lower |
| Nonfat Dry Milk | Increasing | Good | Higher |
| Whey, Dry | Increasing | Good | Higher |
| Class I Milk Base | Increasing | Good | Lower |
| Class II Cream (Heavy Cream) | Increasing | Good | Lower |
| Class III Milk- CME | Decreasing | Good | Lower |
| Class IV Milk- CME | Increasing | Good | Lower |

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Pork Report

Pork- Pork production last week rose 1.5% from the previous week and was 1.8% larger than last year. The September US and Canadian hog/pig (3%) and breeding (3.3%) herds were both notably smaller than last year. US pork production during the fall and winter is forecasted to average near 2% below 2008-09. The ham market is moving upward due in part to an increase in demand for the upcoming holiday season. September 30th ham holdings were 18% smaller than last year while belly (80%) and rib (20%) stocks were larger than 2008.



| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|---------------------------------------|---------------------|-----------------|----------------------------|
| Live Hogs | Decreasing | Good | Lower |
| Belly (bacon) | Increasing | Good | Higher |
| Spare Rib (4.25 & down) | Steady | Good | Lower |
| Ham (23-27 lb) | Increasing | Good | Higher |
| Loin (bone-in) | Decreasing | Good | Lower |
| Baby Back Rib (1.75 & up) | Decreasing | Good | Lower |
| Tenderloin (1.25 lb) | Decreasing | Good | Lower |
| Boston Butt, untrimmed 4-8 lb. | Decreasing | Good | Lower |
| Picnic, untrimmed | Increasing | Good | Lower |
| SS Picnic, smoker trim boxed | Steady | Good | Lower |
| 42% Trimmings | Steady | Good | Lower |
| 72% Trimmings | Decreasing | Good | Lower |

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Canned Tomato Report

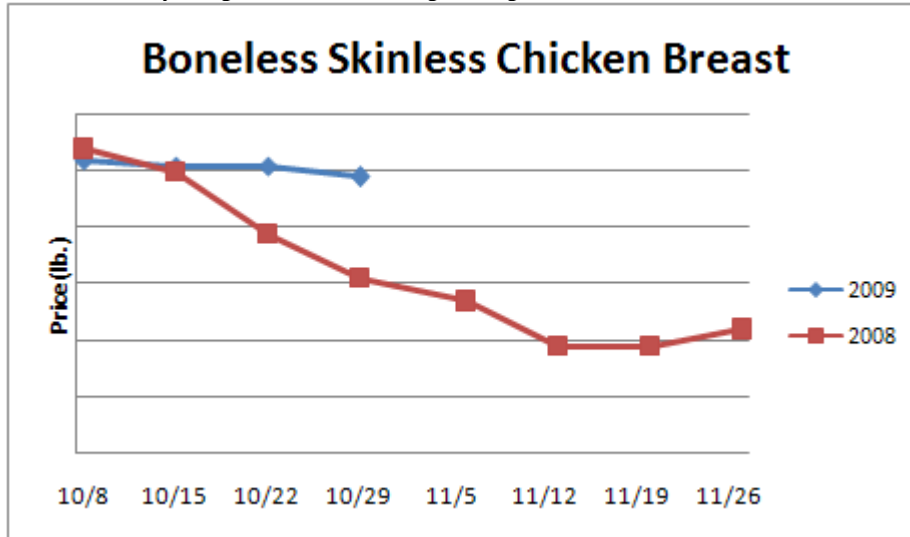
Tomato Products, Canned- The 2009 California tomato harvest will be a record achieving a total of 13.3 million tons, 11% bigger than 2008. The markets are firm.

| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|------------------------------|---------------------|-----------------|----------------------------|
| Whole Peeled Standard | Steady | Good | Higher |
| Diced, Fancy | Steady | Good | Higher |
| Ketchup, 33% | Steady | Good | Higher |
| Tomato Paste- Ind. | Steady | Good | Higher |

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Poultry Report

Poultry- The chicken production slowdown continues and is likely to persist deep into 2010. The September broiler type chick hatch was 2% smaller than the previous year. Pullet placements during September remained modest and the hatchery flock is expected to be near 5% smaller than the prior year levels this winter and spring. The chicken wing markets are firm due to the aforementioned production cutbacks and relatively solid demand. The jumbo cut wing market is anticipated to trade north of \$1.50 through the end of the year. September 30th chicken breast stocks were 16% less than a year ago while chicken wing holdings were 3% more than 2008.

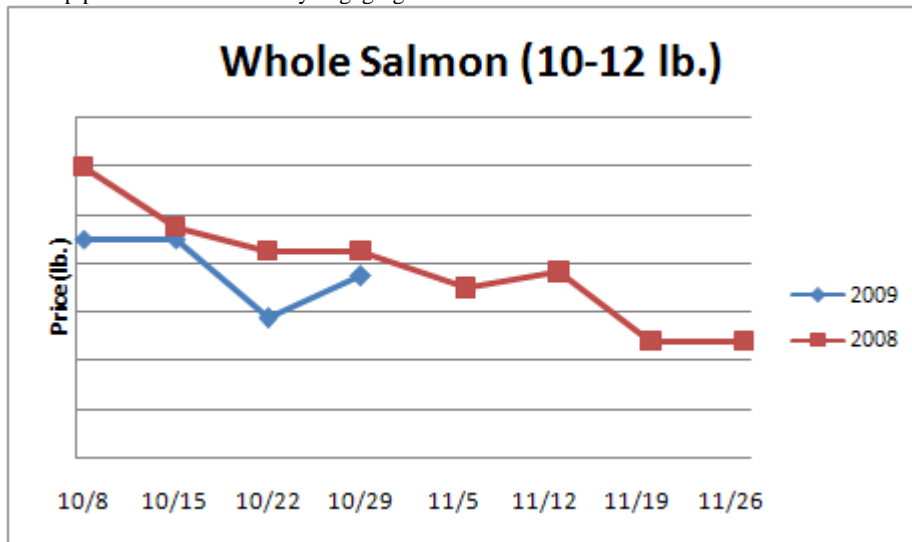


| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|---------------------------------------|---------------------|-----------------|----------------------------|
| Whole Chicken (2.5-3 lb-GA) | Decreasing | Good | Lower |
| Whole Chicken (LA) | Steady | Good | Lower |
| Chicken Wings, Whole | Steady | Good | Higher |
| Chicken Wings, Jumbo Cut | Increasing | Good | Higher |
| Chicken Breast, Bone-In | Decreasing | Good | Higher |
| Chicken Breast, Bnless Sknless | Decreasing | Good | Higher |
| Chicken Tender (random) | Steady | Good | Higher |
| Chicken Tender (sized) | Increasing | Good | Higher |
| Chicken Legs (whole) | Increasing | Good | Lower |
| Chicken Leg Quarters | Decreasing | Good | Lower |
| Chicken Thighs, bone in | Increasing | Good | Lower |
| Chicken Thighs, boneless | Increasing | Good | Lower |
| Large Eggs | Increasing | Good | Lower |
| Medium Eggs | Increasing | Good | Lower |
| Whole Eggs- Liq | Increasing | Good | Lower |
| Egg Whites- Liq | Increasing | Good | Lower |
| Egg Yolks- Liq | Steady | Good | Lower |
| Whole Turkey (8-16 lb) | Steady | Good | Lower |
| Turkey Breast- Bnls/Sknls | Steady | Good | Higher |

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Seafood Report

Seafood- A deflated US dollar and Chilean salmon output challenges continue to hamper US salmon imports. August US salmon filet/steak imports were 13.7% less than the previous year. Lethargic US salmon imports are expected to continue however, lackluster domestic demand may cause salmon prices to trade close to 2008 levels this fall. The snow crab leg markets remain firm. August US snow crab imports were 6% larger than the previous year. Shrimp prices remain relatively engaging.



| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|--------------------------------------|---------------------|-----------------|----------------------------|
| Salmon, Whole (10-12 lb) | Increasing | Good | Lower |
| Catfish, Filets | Steady | Good | Higher |
| Trout, Drn. (8-14 oz) | Steady | Good | Higher |
| Shrimp (16-20 count) | Decreasing | Good | Lower |
| Shrimp (61-70 count) | Steady | Good | Lower |
| Shrimp, Tiger (26-30 count) | Increasing | Good | Higher |
| Snow Crab Legs (5-8 oz) | Steady | Good | Lower |
| Snow Crab Legs (8 oz up) | Increasing | Good | N/A |
| Cod Tails, 3-7 oz. Frz. | Steady | Good | Lower |
| Cod Loins, 3-12 oz. Frz. | Increasing | Good | Lower |
| Salmon Portions, 4-8 oz. Frz. | Steady | Good | Higher |

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Bean, Rice, Coffee and Sugar Report

| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|-------------------------|---------------------|-----------------|----------------------------|
| Pinto Beans | Increasing | Good | Lower |
| Black Beans | Increasing | Good | Lower |
| Rice, Long Grain | Steady | Good | Lower |
| Coffee Beans | Decreasing | Good | Higher |
| Sugar | Increasing | Good | Higher |
| Honey | Steady | Good | Lower |

Paper Product Report

| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|---|---------------------|-----------------|----------------------------|
| Wood Pulp (paper) | | | |
| NBSK- Paper napkin | Decreasing | Good | Higher |
| 42 lb. Linerboard-corrugated box | Increasing | Good | Lower |
| Plastic Resins (plastic, foam) | | | |
| PS-CHH-utensils, cups, to-go cont. | Decreasing | Good | Lower |
| PP-HIGP-heavy grade utensils | Steady | Good | Lower |
| PE-LLD-can liners, film, bags | Steady | Good | Lower |

Retail Price Change from Prior Month

| | <u>Sep-09</u> | <u>Aug-09</u> | <u>Jul-09</u> |
|------------------------------------|---------------|---------------|---------------|
| Beef and Veal | Decreasing | Increasing | Decreasing |
| Dairy | Increasing | Decreasing | Decreasing |
| Pork | Decreasing | Decreasing | Increasing |
| Chicken | Decreasing | Increasing | Decreasing |
| Fresh Fish and Seafood | Increasing | Decreasing | Increasing |
| Fresh Fruits and Vegetables | Increasing | Decreasing | Decreasing |

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Processed Fruits and Vegetables Report

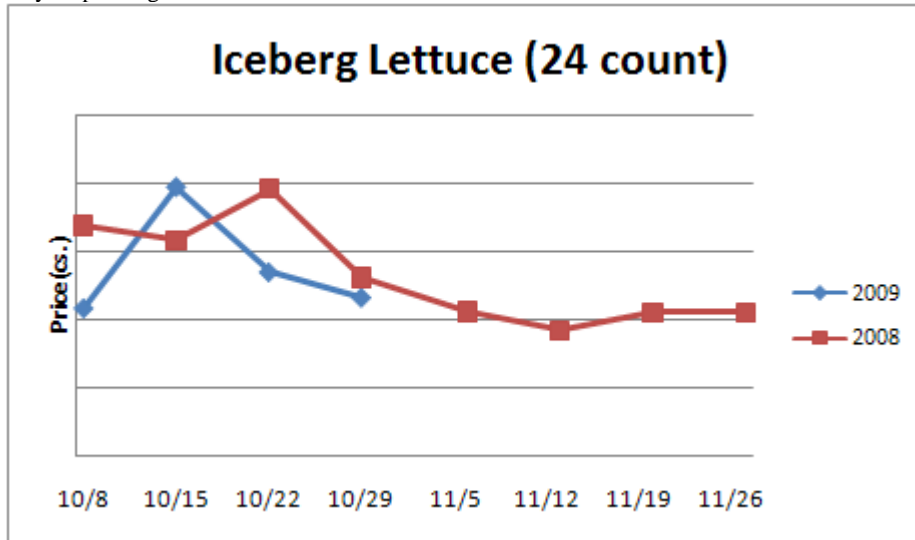
Processed Fruits and Vegetables- September 30th frozen green pea (9%), cob corn (.1%) and cut corn (14%) inventories were all bigger than 2008. The markets are steady.

| <u>Canned 6/10</u> | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|-------------------------------------|---------------------|-----------------|----------------------------|
| Apples, Sliced 6 ½ lb. | Steady | Good | Same |
| Corn, Fancy Whole Kernel | Steady | Good | Higher |
| Green Beans, Fancy 4 sv | Steady | Good | Higher |
| Green Peas, Fancy 4 sv/blend | Steady | Good | Higher |
| <u>Frozen</u> | | | |
| Corn, Cob 96 count | Steady | Good | Same |
| Corn, Kernel 12/2.5 lb. | Steady | Good | Same |
| Green Beans, Cut 12/2 lb. | Steady | Good | Same |
| Green Peas, 12/2.5 lb. | Steady | Good | Same |
| Potatoes, FF Fancy, 6/5 lb. | Steady | Good | Same |

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Produce Report

Produce- The principal lettuce harvest area is transitioning to Huron which will be the main source of iceberg lettuce supplies during the next few weeks. From there, the chief harvest area will shift even farther south to the Yuma/Imperial Valley region. Lettuce shipments may be a bit erratic during these production moves but a notable supply gap is not anticipated at this time. Iceberg lettuce shipments rose 25% last week. Existing onion supplies are reported to be adequate although shipments are trending 5% below a year ago. Additional avocado market declines may be pending.



| | <u>Market Trend</u> | <u>Supplies</u> | <u>Price vs. Last Year</u> |
|--|---------------------|-----------------|----------------------------|
| Limes (150 count) | Decreasing | Good | Higher |
| Lemons (95 count) | Decreasing | Good | Lower |
| Lemons (200 count) | Decreasing | Good | Higher |
| Honeydew (6 ct.) | Decreasing | Good | Higher |
| Cantaloupe (15 count) | Decreasing | Good | Higher |
| Blueberries (12 count) | Increasing | Good | Higher |
| Strawberries (12 pints) | Increasing | Good | Higher |
| Avocados, Hass (48 count) | Decreasing | Good | Lower |
| Bananas (40 lb)-Term. | Increasing | Good | Lower |
| Pineapple (7 ct.)- Term. | Decreasing | Good | Higher |
| Idaho Potato (60 count) | Decreasing | Good | Lower |
| Idaho Potato (70 count) | Decreasing | Good | Lower |
| Idaho Potato (70 count)-Term. | Decreasing | Good | Lower |
| Idaho Potato (90 count) | Decreasing | Good | Lower |
| Idaho Potato #2 (6 oz. min.) | Decreasing | Good | Lower |
| Processing Potato (100 lb) | Steady | Good | Lower |
| Yellow Onions (50 lb) | Steady | Good | Lower |
| Yellow Onions (50 lb)-Term. | Increasing | Good | Lower |
| Red Onions (25 lb)-Term. | Increasing | Good | Higher |
| White Onions (50 lb)-Term. | Increasing | Good | Lower |
| Tomatoes, (large- case) | Decreasing | Good | Higher |
| Tomatoes, (5x6, 25 lb.)-Term. | Decreasing | Good | Lower |
| Tomatoes, Vine Ripe, (4x5) | Decreasing | Good | Lower |
| Roma Tomatoes (large- case) | Decreasing | Good | Higher |
| Roma Tomatoes (xlarge- case) | Decreasing | Good | Higher |
| Green Peppers (large- case) | Increasing | Good | Higher |
| Red Peppers (large- 15 lb. cs.) | Increasing | Good | Higher |
| Iceberg Lettuce (24 count) | Decreasing | Good | Lower |

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| | | | |
|---------------------------------------|-------------------|-------------|--------------|
| Iceberg Lettuce (24 cnt)-Term. | Decreasing | Good | Lower |
|---------------------------------------|-------------------|-------------|--------------|

Produce Report (continued)

| | | | |
|------------------------------------|-------------------|-------------|---------------|
| Leaf Lettuce (24 count) | Decreasing | Good | Higher |
| Romaine Lettuce (24 count) | Decreasing | Good | Higher |
| Mesculin Mix (3 lb)-Term. | Increasing | Good | Lower |
| Broccoli (14 cnt.) | Decreasing | Good | Lower |
| Squash (case) | Steady | Good | Higher |
| Zucchini (case) | Increasing | Good | Higher |
| Green Beans (bushel) | Increasing | Good | Higher |
| Spinach, Flat 24's | Decreasing | Good | Lower |
| Mushrooms (large), Term. | Decreasing | Good | Higher |
| Cucumbers, Bushel | Increasing | Good | Lower |
| Pickles (200-300 ct.)-Term. | Increasing | Good | Lower |
| Asparagus (small) | Increasing | Good | Higher |
| Freight (CA to City Avg.) | Decreasing | Good | Lower |

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