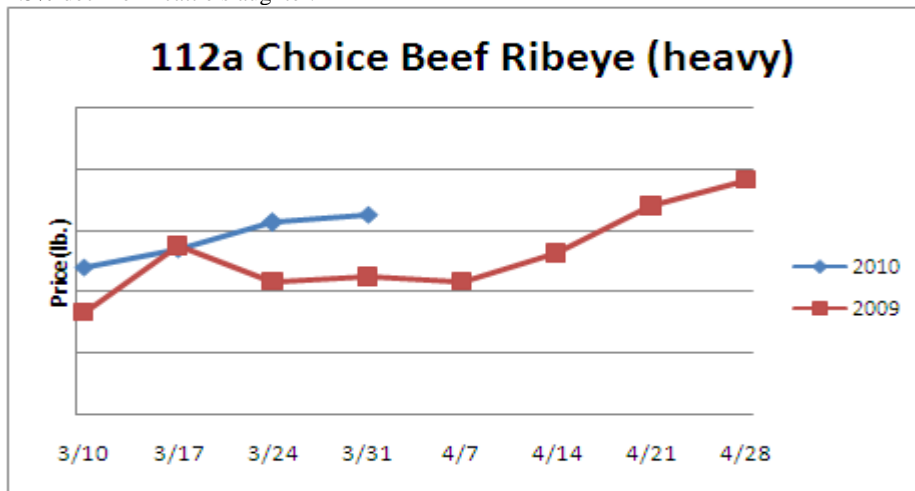


# Beef, Veal and Lamb Report

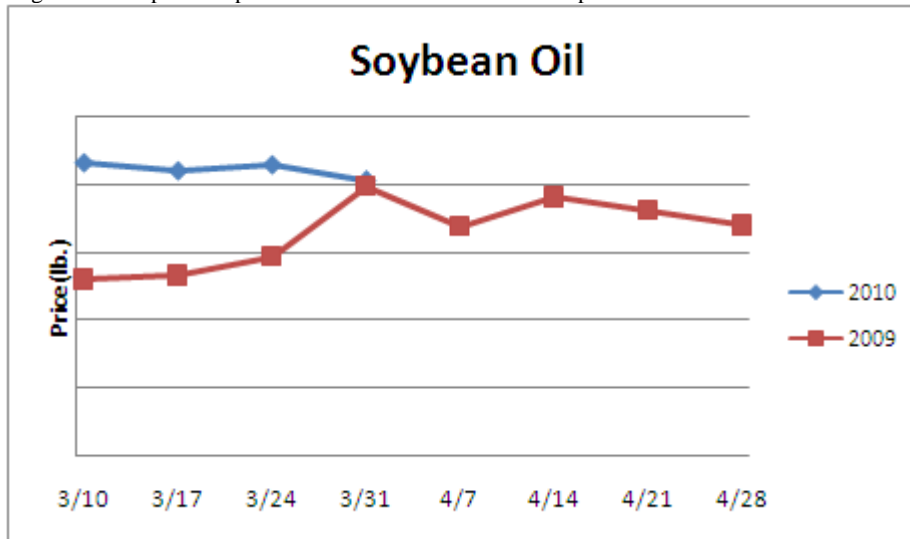
**Beef, Veal & Lamb-** Beef production last week declined .4% but was 2.2% larger than the same week a year ago. Solid steak cut demand in recent weeks has been driving many beef cuts upward including loins, ribeyes, top butts and tenderloins. Still, buyers are reported to be curbing purchases due to the rise in prices which suggests that the overall beef market may be nearing a top. The percentages of cattle grading choice and prime continue to trend well above historical norms. So, first quarter choice and prime total beef output is estimated to be 4% more than 2009 despite a 1.5% decline in cattle slaughter.



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

# Oil and Grains Report

**Oil & Grains-** According to the USDA, 2010/11 crop soybean (.8%) and corn (2.7%) acreage are forecasted to be larger than the prior crop. The markets are weak due to ample stocks.

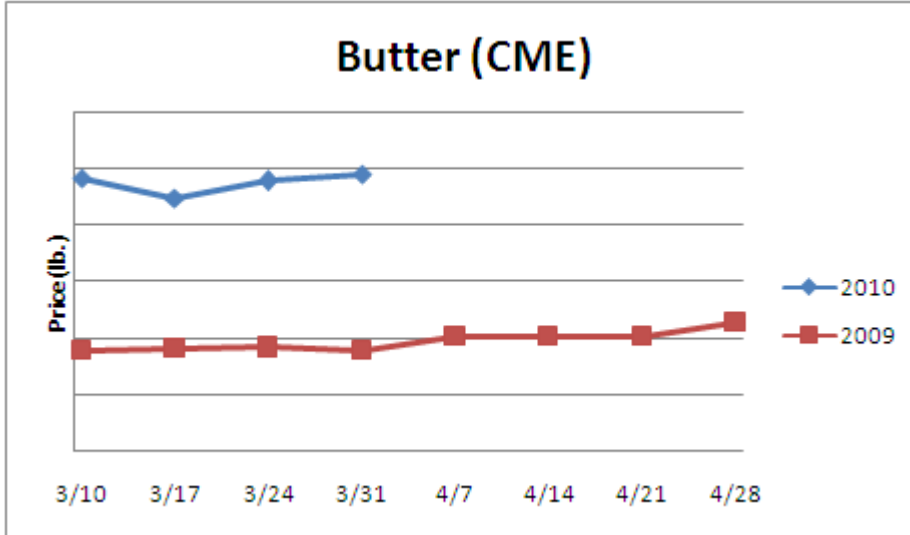


	<u>Market Trend</u>	<u>Supplies</u>	<u>Price vs. Last Year</u>
<b>Soybeans</b>	<b>Increasing</b>	<b>Good</b>	<b>Higher</b>
<b>Crude Soybean Oil</b>	<b>Decreasing</b>	<b>Good</b>	<b>Higher</b>
<b>Soymeal</b>	<b>Increasing</b>	<b>Good</b>	<b>Lower</b>
<b>Corn</b>	<b>Decreasing</b>	<b>Good</b>	<b>Lower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

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# Dairy Report

**Dairy-** The CME cheese markets are jumping higher mostly on buyer interest and not actual sales. On Wednesday, only one load of barrels and one load of blocks moved at the listed prices below. Cheese stocks are historically burdensome which could limit any near term additional upward movement in cheese prices. The butter market continues to edge upward. History indicates that additional butter market increases may be forthcoming. However, the butter market has not traded appreciably above \$1.53 in seventeen months. Milk producer margins waned in March.

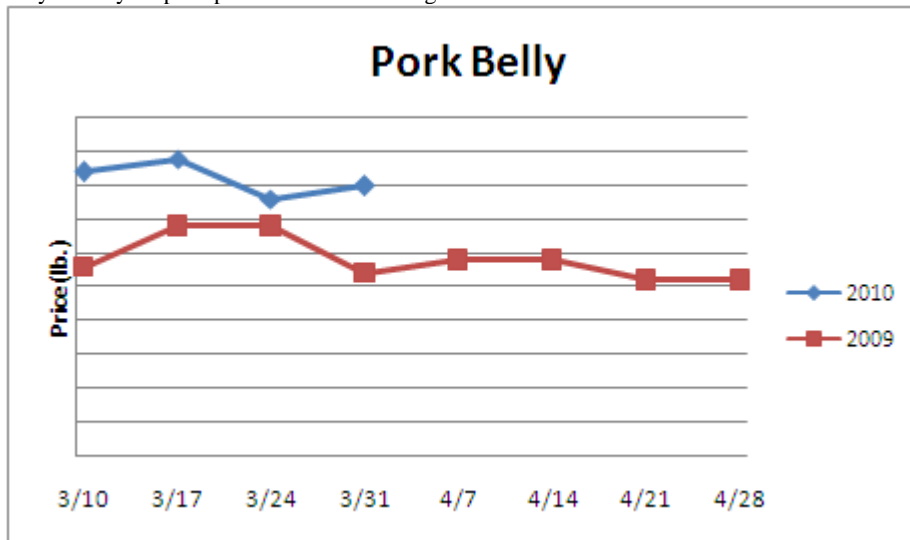


	<u>Market Trend</u>	<u>Supplies</u>	<u>Price vs. Last Year</u>
<b>Cheese Barrels- CME</b>	<b>Increasing</b>	<b>Good</b>	<b>Higher</b>
<b>Cheese 40 lb Blocks- CME</b>	<b>Increasing</b>	<b>Good</b>	<b>Higher</b>
<b>American Cheese</b>	<b>Increasing</b>	<b>Good</b>	<b>Higher</b>
<b>Cheddar Cheese</b>	<b>Increasing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

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# Pork Report

**Pork-** The March 1<sup>st</sup> US hog and pig inventory was 3% less than 2009 and the smallest for the date in three years. The March 1<sup>st</sup> swine breeding herd was 4% less than the prior year and the smallest for any date since at least 1962. The report indicates that hog farmers have continued to reduce the herd which is bullish for hog prices later this year. The pork markets are mixed. Usually the USDA pork cutout begins an upward course shortly that carries deep into May. Last year pork prices rose 11% during the next two weeks.



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

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# Canned Tomato Report

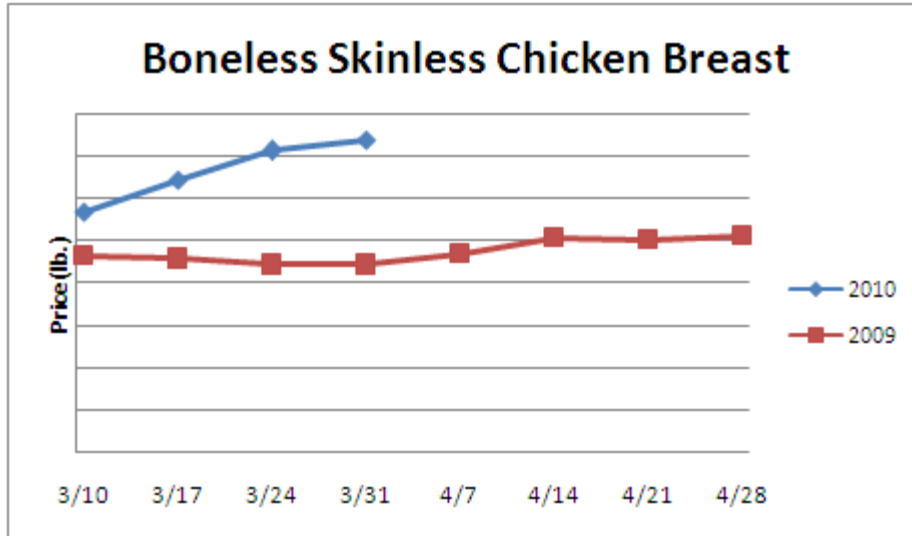
**Tomato Products, Canned-** Manufactured tomato supplies are ample with discounting occurring to move product. Further market declines may be pending this summer.

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

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# Poultry Report

**Poultry-** The USDA March broiler-feed price ratio was the highest for any month since September of 2007 suggesting much improved profitability for chicken producers. Recovering margins as of late can almost entirely be attributed to rising chicken breast markets. Boneless skinless chicken breast prices are currently trading at some of their highest levels in thirty months. History indicates that the boneless skinless chicken breast market could rise an additional \$.10-\$.15 a pound during the next six weeks. Weekly chicken production gains over a year ago could intensify as we get into the summer. The wing markets are mixed. Wing prices typically come off roughly 7% during the next two months.

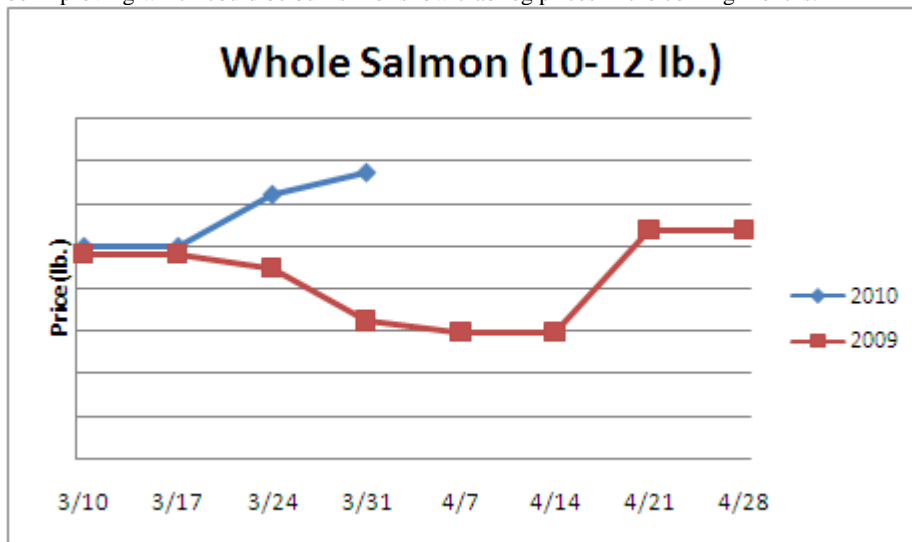


	<u>Market Trend</u>	<u>Supplies</u>	<u>Price vs. Last Year</u>
<b>Whole Chicken (2.5-3 lb-GA)</b>	Increasing	Good	Lower
<b>Whole Chicken (LA)</b>	Increasing	Good	Same
<b>Chicken Wings, Whole</b>	Increasing	Good	Higher
<b>Chicken Wings, Jumbo Cut</b>	Decreasing	Good	Lower
<b>Chicken Breast, Bone-In</b>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

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# Seafood Report

**Seafood-** A relatively deflated US dollar and shortened output in Chile continue to cause US salmon filet/steak imports to trend below historical norms. January salmon filet/steak imports were 16% less than the previous year. Fairly inflated salmon filet prices are anticipated to persist throughout the spring. Snow crab leg demand is reported to be improving which could be bullish for snow crab leg prices in the coming months.



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

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# Bean, Rice, Coffee and Sugar Report

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

# Paper Product Report

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

# Retail Price Change from Prior Month

	<u>Feb-10</u>	<u>Jan-10</u>	<u>Dec-09</u>
<b>Beef and Veal</b>	Increasing	Decreasing	Decreasing
<b>Dairy</b>	Decreasing	Increasing	Increasing
<b>Pork</b>	Increasing	Increasing	Decreasing
<b>Chicken</b>	Increasing	Decreasing	Decreasing
<b>Fresh Fish and Seafood</b>	Decreasing	Increasing	Decreasing
<b>Fresh Fruits and Vegetables</b>	Decreasing	Increasing	Increasing

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# Processed Fruits and Vegetables Report

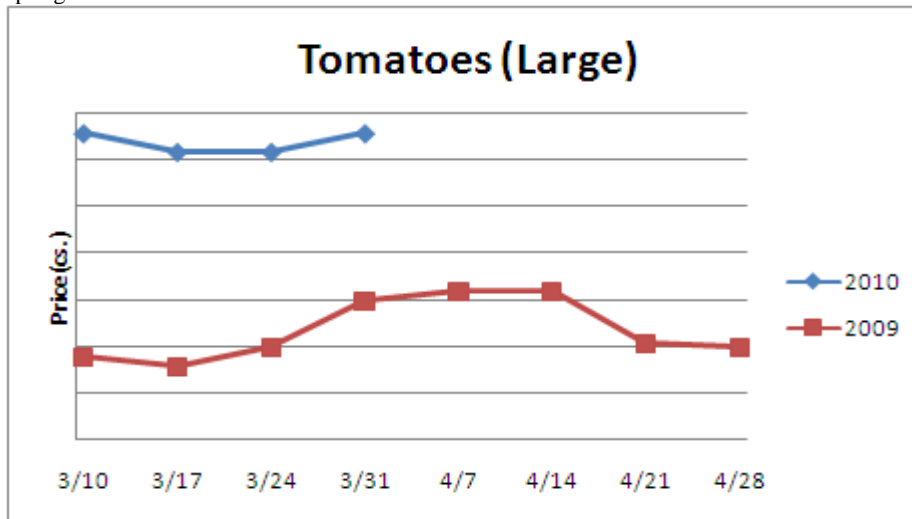
**Processed Fruits and Vegetables-** February 28<sup>th</sup> frozen green bean stocks were 16% below a year ago. February cut corn holdings were 34% more than 2009. The markets are soft.

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

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# Produce Report

**Produce-** Challenging weather in the main lettuce harvest region is slowing the lettuce harvest this week. Lettuce supplies are anticipated to improve with better weather during the next ten days which could be bearish for lettuce prices. The chief lettuce harvest area will shift north again in a few weeks. The yellow onion market is off its highs from last week. The onion harvest in Texas should begin shortly and build as April progresses. Additional yellow onion price decreases are anticipated. The tomato markets are projected to remain somewhat inflated through the spring.



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

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# Produce Report (continued)

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

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