

Weekly Market Review

January 30, 2026

Overview

Extreme Weather Alert: Cold weather will hit South Florida this weekend, impacting several commodities: **Tomatoes, Bell Peppers, Berries, Squash, Corn** and **Slicer Cucumber** to name a few. Weather is forecasted to be at or near freezing through this week with Sunday and Monday being the coldest and we could very well see a hard freeze in some locations. We will be assessing daily with the shipper community as conditions develop.

Production will be lighter out of all growing regions over the next several days due to cold weather and rain, impacting Florida and Mexico. Over the past week in Florida, and going into the next, we saw temperatures below freezing for multiple hours in some districts, which will further tighten supply and create market volatility. As of today, we are seeing strong demand with a lot of mixed quality across all commodities. In the short term, we will see tighter markets on some **Hot Peppers, Bell Peppers, Squash, and Tomatoes**. We are also seeing logistics challenges start to impact shipping lanes as trucks are short, either stuck in last week's weather or just generally short due to high demand, which will further complicate an already short market.

Table Grapes supply is steady as offshore volume continues to be strong, with good supply on Reds, while Green varieties are behind and are the shortest. Quality has been outstanding!

The **Limes** market is active, and large-sized fruit is tighter this week as we drill into the newer regions, which are currently peaking on 200s and smaller. We expect volatility through Q1, as predicted.

Banana supplies are expected to tighten going into the new year, with challenges anticipated on the spot market as growers navigate increased global demand combined with virus-related and economic pressures in tropical growing regions. We are seeing better arrivals on

Cantaloupes and **Honeydews** from Guatemala this week. Quality has been holding up nicely, with good Brix levels on both.

Pineapples availability has improved slightly but remains limited, and shippers are asking that we continue to be flexible on Pineapples sizes.

Avocado volume remains strong, with the Super Bowl less than two weeks away. The current size profile continues to favor medium and large fruit, while small sizes are becoming more limited as the season progresses. Lenticel is still present but is typical for this time of year due to rain. Colombia season is going strong, with limited volume currently landing in the U.S.

Seasonal **Strawberries** transitions are underway across key growing regions, with fall production winding down in California as spring crops ramp up, supporting steady winter supply and improving volumes expected with warmer, drier weather. Baja volumes are increasing week over week, while Central Mexico has begun to taper slightly after reaching peak production, with overall quality remaining good.

Florida production is currently down due to cooler temperatures, with short-term frost risk expected to keep volumes lower before a rebound as conditions normalize. The recent cooling trend in Yuma is a welcome development and should help slow crop growth on certain items. However, prior weather conditions have already caused significant damage, resulting in mildew issues across **Lettuce (Romaine, Iceberg, and Green Leaf)** and all Tender Leaf items. Due to mildew pressure, harvestable acreage is limited.

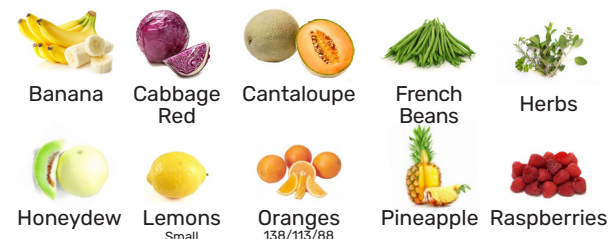
EXTREME



ESCALATED



WATCHLIST



Additionally, cooler temperatures have brought morning frost, which will further constrain supplies on select commodities. **Spinach** remains at an extreme trigger, with very limited availability. **Arugula** and **Spring Mix** are also being impacted. Across Lettuce and Tender Leaf items, customers should expect quality challenges, tight supplies, potential prorates and shortened shelf life. These conditions are expected to persist through at least mid-February. The Lettuce market remains escalated, with the USDA rising rapidly. Supplies have tightened considerably, and reduced case weights are expected. Market volatility is anticipated as we move into February, as mildew damage and erratic weather continue to significantly affect both quality and availability.

Supplies of **Brussels Sprouts, Carrots, Celery, and Green Onions** remain extremely limited industry-wide, with prorates likely on all four items. Green Onion availability will remain tight, with full relief not expected until mid-February. Celery supplies continue to be constrained due to storm-damaged fields, resulting in the loss of significant acreage. Whole Celery will be held to strict averages, while VA Celery packs should expect prorates in the range of 10–15%. Celery supplies are not expected to improve until mid-February. Carrots are also being held to strict averages, with prorates anticipated on Cellos and Jumbos. Harvesting has been heavily impacted by recent rainfall, and persistent fog has limited the sun exposure needed to dry fields. These conditions are expected to continue for the next two to three weeks. Brussels Sprouts supplies remain limited. While growers are maintaining strict averages where possible, prorates continue to occur. Although conditions are slowly improving, full relief is not expected for approximately two more weeks.

Italian Parsley and Cilantro remain very tight, with strict averages in place and potential prorates.

Broccoli has moved to an extreme trigger, and **Cauliflower** remains escalated across all sizes. Growers continue to report pin rot, water spotting, and smaller sizing, all of which are contributing to limited supplies. **Anise/Fennel, Leeks, and Napa Cabbage** also remain escalated, with ongoing quality and supply concerns. We are closely monitoring mildew pressure and weather-related impacts and will continue to provide updates as new information becomes available. As cooler temperatures persist and morning frost becomes more prevalent, intermittent supply gaps should be expected.

In California, **Lemon** availability is good across all sizes, with a focus on larger fruit and some tightness in 165/200 counts. Navel **Orange** availability is present, though most suppliers are continuing to experience tight supply on smaller sizes (88's-138's). There are good supplies on 72's and larger, so please consider this as an option to cover volume.

FRUITS & VEGETABLES

Avocados: Mexico had 85.7-million-pound harvest for week 4, with 77.5 million pounds shipped to the U.S. Sizing continues to peak toward 48s and 60s count, while dry matter has climbed to 31%. The main crop now accounts for 90% of the total harvest volume. Demand is expected to remain strong as we prepare for the biggest avocado consumption day of the year, the Super Bowl.

Bananas: WATCHLIST Banana supply will begin to tighten over the coming weeks as global demand increases and production in the tropics steadily declines. A combination of virus pressure, low yields, and increasing production costs has placed significant strain on this staple commodity. Overall, banana quality remains very good, and supply is adequate. The key to navigating the coming year will be consistency in supply, consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

BERRIES

Strawberries: ESCALATED Demand is beginning to exceed supply as seasonal transitions shift production across key growing regions. While volumes are beginning to build in some areas, cold weather impacts and recent peak harvest declines are keeping overall availability tight in the near term. The Oxnard and Santa Maria summer-planted fall crop is rapidly winding down as seasonal production concludes. Fall-planted Spring crops in both regions are coming into production at the right time to support steady supplies through the winter months. Overall quality remains good, with volumes expected to increase gradually as warmer, drier weather returns. Out of Baja, both conventional and organic production are ramping up, with volumes forecasted to increase week over week as warmer; dry conditions are expected in the immediate forecast. Central Mexico production remains steady but has begun to taper off after reaching peak volumes over the past month. Overall quality continues to be good. Florida production is down approximately fifty percent from recent weeks due to cooler temperatures and reduced harvest estimates. Volumes are expected to remain lower over the next couple of weeks but should rebound as the weather returns to more normal, warmer conditions. The ten-day forecast includes several days with temperatures below freezing, increasing the risk of frost or freeze damage.

GetFreshProduce.com

California Rio Red **Grapefruit** are now available, with tightness on 36/40 FCY, though choice grade is available. For some suppliers, Mandarins are seeing renewed harvest as fields dry, with all pack sizes available despite lingering fog. For others, Mandarins remain in very limited supply, with crops peaking on larger sizes. Blood Oranges are ready for shipment, with large sizes available. Cara Cara Oranges are peaking on 88 FCY, while also struggling with supply on smaller sizes. Minneola production has begun, with initial offerings available, though they are also tight on smaller sizes. Texas is nearing the end of its early Navel season, transitioning to later varieties that are currently peaking on 88's. Texas Grapefruit is also shipping, with peak availability in 40/48's and larger.

Pineapples: WATCHLIST The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. Our contracts continue to maintain their integrity; however, we will need to remain flexible regarding sizes to ensure the stability of the supply chain. Overall, the quality and taste are good.

Table Grapes: Quality is outstanding, and Brix are hitting the high teens. We seem to be in a good stride with stable availability on all three colors. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

Blackberries: Production continues in Central Mexico and Baja with good overall availability. Quality remains good, though some softness and occasional red cell or color reversion are being reported as a result of recent heat, rain, and humidity.

Raspberries: WATCHLIST Production continues in Central Mexico and Baja, though supplies have tightened as crops move past their seasonal peak, resulting in reduced availability. Overall quality remains good; however, some instances of soft or overripe fruit are being observed due to recent heat, rainfall, and elevated humidity in the growing regions.

Blueberries: EXTREME Production remains active in CMEX (Central Mexico), though supplies are tightening as volume trends down from seasonal peak levels. Mexican quality and sizing continue to perform well, and CMEX blueberry quality is reported to be significantly stronger than offshore blueberry offerings currently in the market.

CITRUS

Limes: ESCALATED Supply steady out of Mexico, Columbia and Peru. Size profile continues to be heavy to the smaller fruit as of this week. As we get deeper into the new crop, we are starting to see more larger fruit out of Mexico due to the rain in Southern Mexico. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability is expected through March.

Small Oranges: WATCHLIST Small fruit is very tight and is expected to continue tightening as harvesting is affected by rain and fog.

WEST COAST LETTUCE

Iceberg: ESCALATED Lettuce quality and supplies are just okay, and weights will be light. The market is active, and weather has affected both harvesting and quality. Growers expect the market to continue to rise due to yields being low because of mildew damage and cap leaves. Quality will be hit or miss as we go into February. Shortened shelf-life issues should be expected. Cello/Wrapped is at the extreme trigger.

Iceberg VA: Quality and supplies are just okay. We have seen reports of short shelf life and mildew in bags.

Romaine & Romaine Hearts: Romaine and Romaine Heart quality and supplies are okay. There have been reports of bruising, mechanical damage, light weights and mildew on the outer leaves. For the hearts, very little heart material is available.

Romaine VA: Quality and supplies are okay. We have seen more core in the bags and some mildew.

Boston/Butter Lettuce: ESCALATED Quality is okay, but supplies are tight. Mildew and fringe burn pressure have been observed, and weather continues to affect harvesting and quality.

Green Leaf, Better Burger and Red Leaf: Quality is good, and supplies have improved. Mildew and fringe burn pressure persist, and carton weights remain light, though conditions are improving.

EASTERN AND WESTERN VEGETABLES

Extreme Weather Alert: Cold weather will hit South Florida this weekend, impacting several commodities: Tomatoes, Bell Peppers, Berries, Squash, Corn and Slicer Cucumber to name a few. Weather is forecasted to be at or near freezing through this week with Sunday and Monday being the coldest and we could very well see a hard freeze in some locations. We will be assessing daily with the shipper community as conditions develop.

Green Bell Pepper: ESCALATED Lighter supply this week due to cooler weather. Quality is still very good from Nogales, McAllen, and South Florida. We will need to assess the impacts of the extreme cold weather that will hit South Florida this weekend and could impact markets next week.

Color Bell Pepper: Lighter volume due to cooler weather. Overall quality will remain good out of McAllen and Nogales.

Mini Sweet Pepper: Supply is steady this week, and quality is good.

Mixed Chili Pepper: ESCALATED Supplies are good out of Sinaloa and Sonora. Markets will be shorter this week on Habanero and Shishito Pepper. We hope to see improvement next week on the short items. We do anticipate shorter availability on Anaheim and Poblano as Lent approaches; these items are a staple for stuffing with cheese and crab meat during the Holy season.

Tomatillo: ESCALATED Supply turned and got very short due to heavy rains this past week. Market volatility is expected through the next 10 to 14 days.

Eggplant: ESCALATED Domestic supply is very light this week out of Florida due to the cold weather while crossings through Nogales remain strong. Best quality is out of Mexico. We will need to assess the impacts of the extreme cold weather that will hit South Florida this weekend and could impact markets next week. **Pickles:** Steady crossings through Nogales and McAllen. Quality is good.

English Cucumbers: Lighter supply and moderate demand have pushed pricing higher this week out of Nogales and McAllen. Quality is good.

Slicer Cucumbers: ESCALATED Supply crossing through Nogales and McAllen was lighter this week due to cooler weather. Quality remains strong. Domestic supply will be extremely limited with this week's cold weather in Florida. Honduras will start shipping over the 7 to 14 days.

Green Beans: ESCALATED Supply got very short out of Florida due to last week's freeze and expect to see volatility over the next several weeks as growers assess potential losses. Markets jumped several dollars, and quality is fair on what is available. Mexico is also seeing lighter availability due to cooler weather slowing down production. High demand has also put upward pressure on FOB pricing out of Nogales. We will need to assess the impacts of the extreme cold weather that will hit South Florida this weekend and could impact markets next week.

French Beans: WATCHLIST Supplies of both organic and conventional French beans out of Guatemala are fair to good, though container delays continue to impact movement. Mexican French bean availability is fair, with cooler weather continuing to affect yields.

Zucchini/Yellow Squash: WATCHLIST Supply is lighter out of Florida and crossing through Nogales due to cooler weather. Pushing markets higher. Best quality is out of Mexico.

HERBS

WATCHLIST Basil supply and quality may be inconsistent due to cooler weather, with occasional tip burn possible during the winter months. Tarragon availability remains limited, with fair overall quality. Arugula, Italian Parsley and Cilantro are extremely limited from some growers and prorates should be expected.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Limited	Marginal	USA
Basil	Very Limited	Marginal	USA/MEX
Opal Basil	Very Limited	Marginal	USA
Thai Basil	Very Limited	Marginal	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	USA
Chives	Steady	Steady	MEX
Cilantro	Limited	Marginal	USA/MEX
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Steady	USA
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Very Limited	Marginal	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Very Limited	Marginal	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

MELONS **WATCHLIST**

Cantaloupe production will remain steady for another week but will fall off as Guatemala transitions to a different growing region. Honeydew volume is still limited on 8ct. Quality on both has been good with solid Brix levels.

Watermelon: The market on seedless melons have increased with less Mexican production. Cooler temperatures in Guatemala have seen watermelon production drop significantly and a shift in size from 45's to 36's. Supply of Mexican watermelons via Texas and Nogales have slowed and had transportation issues.

Cantaloupe: There is a good mix of 9/12s available, while smaller fruit 12 and 15s remain tight. Demand was temporarily slowed by winter storms that hit most of the US, but some areas are starting to replenish inventories. Quality overall continues to be good. Brix levels mostly range from 12-14%.

Honeydew: Honeydew production has improved but 8ct only accounts for 1% of production. We expect honeydews to be a challenge when the growing regions change in a couple of weeks, with improvements likely around the last week of February. Flexibility on sizing will be required during this period. Quality has been good and improving with Brix levels at 12-13%.

MIXED VEGETABLES

Artichokes: Quality is good, but supplies are still limited. Growers are holding to averages, and there may be some substitutions on sizes. Large sizes are still extremely tight, with growers mainly subbing 12ct and 18ct when possible. These sizing issues are expected to last through mid-February.

Asparagus: **ESCALATED** Mexican production has slowed as cooler temperatures impact the San Luis and Caborca regions, while Peruvian production continues to decline due to normal seasonal transitions. With supply shifting from Peru to Mexico and winter weather reducing demand across the U.S., market activity has softened.

Bok Choy: **ESCALATED** Quality and supplies are okay.

Broccoli Florets/Broccoli Crowns: **EXTREME** Quality is okay, and supplies have tightened up. The rain and the warmer weather that Yuma experienced has led to quality issues that will remain for the next few weeks. Reports of browning, pin rot continue. Growers are holding to strict averages for now but prorates should be expected.

Broccolini and Sweet Baby Broccoli: **ESCALATED** Quality is good, but supplies are extremely limited with most growers. Weather has affected harvesting and quality. Growers are holding to strict averages, when possible, but prorates should be expected. The market is escalated due to limited supplies.

Brussels Sprouts: **EXTREME** Supplies are still limited but are improving. We are still combating insect pressure and internal browning. The market remains at the extreme trigger, but we should start to see some relief in the next 2 to 3 weeks. Growers will be holding to strict averages when they can, but some prorates should be expected.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve (Approx. 2-3 weeks). There are Jumbos available in GA. *Growers request orders be sent in as early as possible.*

Cauliflower: **ESCALATED** Quality is okay, but supplies are tightening up. The market is escalated and will likely stay that way for the next few weeks. Organic Cauliflower is at the extreme level.

Celery: **EXTREME** Quality is okay, and supplies are extremely tight. Weather has affected harvesting and quality, prorates should be expected on VA items until mid-February. Quality issues should be expected as they growers work through the affected fields.

Corn, Sweet: **WATCHLIST** We will see a split market on corn this week due to cold weather in Florida. Markets were higher out of Florida over Mexico. Quality is good out of Both regions this week. We will need to assess the quality in Florida after this week's cold weather.

Fennel: **ESCALATED** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

Kale: Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

Leeks: **ESCALATED** Quality and supplies look okay.

Garlic: Quality remains good although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: Supplies and quality are good.

Green Onions: **EXTREME** Supplies are extremely limited, and quality is okay. Some growers have reported being completely out of supplies. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging though mid-February.

Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to very strict averages, when possible, but prorates should be expected for at least the next two weeks.

Mushrooms: We are now into our typical holiday pattern, with lower volume and extremely high demand. Supply is expected to be light through the first of the year. Quality is good.

Napa Cabbage: Quality is good, but supplies are tight. The market is increasing.

Parsley (Curly, Italian): **ESCALATED** Supplies and quality have been affected by recent rains. Prorates should be expected on Italian Parsley. Weather has affected harvesting and quality. Yields are expected to remain challenging throughout January.

Rapini: Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

Red Cabbage: **WATCHLIST** Quality looks good, but supplies are light.

Spinach: **EXTREME** Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging.

Spring Mix: Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. Yields are expected to remain challenging.

Snow Peas and Sugar Snaps: **ESCALATED** Guatemalan snow pea supplies have improved, while sugar snap availability continues to be impacted by cold weather. Mexican snow pea and sugar snap supplies remain limited due to recent rainfall and colder temperatures.

ONIONS:

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

TOMATOES: EAST COAST

Round and Roma Tomatoes: ESCALATED Markets are expected to be firmer this week as cold weather continues to impact production in Immokalee and Homestead. We do expect to see volatility increase with this week's forecast as well. We do expect to see demand exceeds supply over the next 7 to 10 days on mature greens and vine-ripes. We will need to assess the impacts of the extreme cold weather that will hit South Florida this weekend and could impact markets next week.

Snacking Tomatoes ESCALATED

Grape Medley, Grape and Cherry Tomatoes: Supply was very short this week, and pricing was higher. We are assessing the damages and impacts of the recent cold weather on future plantings. We will need to assess the impacts of the extreme cold weather that will hit South Florida this weekend and could impact markets next week.

OTHER FRUIT: Apples: The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100-175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

POTATOES:

Potato supply for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. Burbanks will begin to ship in limited volume in mid-October, while Norkotahs will continue to make up the majority of supply. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

TOMATOES: MEXICO

Round Tomatoes: ESCALATED Volume has dropped drastically due to last week's rain and cold weather combined with higher demand from the east and seeing very high FOB prices established. Quality remains very good through McAllen, and Nogales.

Roma Tomatoes: ESCALATED Lighter supply due to cooler weather and higher demand from the east will keep markets firm this week. Overall, quality is good crossing through McAllen and Nogales.

Snacking Tomatoes ESCALATED

Grape Medley, Grape and Cherry Tomatoes: Lighter supply and higher demand from the east have pushed prices up a tad and expecting that trend to continue this week with the cold weather in Florida. Quality is outstanding.

Pears: D'Anjou availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August.

Red D'Anjou pears are moderately available in US #1 35-55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Steady supply available out of California.

Asian Pears: Lighter volume, good supply on larger sizes.

Cherries: Steady supply available out of Argentina and Chile.

Stone Fruit: Good supply on Peaches currently out of Chile.

Kiwi Fruit: Supplies fair out of California as well as offshore landing on the East coast.

Quince: Limited supply available this week.

DAIRY:

There is no evidence that the supply situation looks any different than it did 60 days when dairy markets were trending sharply lower. (although we are 60 days closer to the eventual slowdown in production) So I think we have to blame the price strength we're seeing on good demand, short covering, or that the market overshot to the downside in December. Depending on the product and region you look at, I think all 3 drivers are probably at play with U.S. cheese and butter maybe overshooting the downside, short covering helping the SMP/NFDM markets and good global demand supporting NZ prices. But it is still hard for me to get real bullish until we see evidence that the supply side is slowing down.

BEEF:

Demand should be brisk once the storm clears as buyers work to refill the pipeline. Current packer margins are estimated at -\$150 per head, keeping processors motivated to manage kills tightly. Analysts expect the next 60-90 days to be the tightest period for cattle availability in the current cycle, a view supported by the lighter placement trends seen in recent monthly Cattle on Feed reports. Choice and higher grading has averaged 87% so far in January—a record—driven by cattle staying on feed longer. Feeders continue to chase maximum pounds given the short supply of feeders, which isn't new, but the record grading level is notable. This week, chucks, rounds, and middle meats are steady, although chucks are facing some resistance after their strong recent run. Valentine's Day is a little over two weeks away, so steak primals are expected to begin softening on waning demand. Grinds, meanwhile, don't have much downside in the near term given reduced harvest levels and still reasonable price points.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS - Prices are trending steady for all sized WOGS and whole fryers. Supplies of 3-4 pound sizes are moderate as parts of the Northeast and southeast brace for more inclement weather moving into the area over the weekend. Demand is light to moderate. Floor stocks sufficient. Market activity is slow to moderate. In the parts sector, prices are trending firm for tenders, b/s breast and wings; steady to firm for most dark meat cuts. Supplies of breast items, tenders and wings are in close balance to tight; light to moderate for dark meat cuts with leg quarters noted as slightly more available. Demand is moderate to good. Market activity is moderate to active.

EXPORT MARKET HIGHLIGHTS - Export demand is light to moderate.



Fresh Is Everything

SHELL EGGS:

National FOB shell egg weighted average prices are steady to higher. The undertone is firm to higher. Retail demand is moderate to good. Loose egg movement is moderate. Offerings are light to moderate. Supplies remain mixed. Market activity is moderate to instances active. California weighted average delivered prices are mixed, although lightly tested. The undertone is firm. Retail demand is generally light to moderate. Food service movement is moderate. Distributive buying interest is light. Offerings are light to moderate. Supplies are mostly moderate for current needs. Market activity is moderate.

PORK:

Hog futures have been trending higher since early December, even as USDA reports project larger Q1 and Q2 2026 supplies compared with last year. Many analysts view the rally as funddriven, with traders positioning for a potential uptick in PEDv or PRRS cases this spring. Whatever the reason, the move appears demanddriven rather than supplydriven at this stage. Time will tell whether disease pressures materialize. Production and logistics continue to face weather related challenges this week. Loins are steady, butts are firming, and ribs and trim are steady. Bellies remain unsettled, but carry more upside than downside as we move toward March. Hams are steady after recent strength.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - Frozen 8-16 lb. hens and 16-24 lb. toms steady. Demand light. Offerings light. Frozen commodity Grade A 8-16 lb. hens offered at 166-177 and 16-24 lb. toms at 166-178 cents FOB for current shipments. Most expect some movement once the conference has concluded, currently leaving not much trading to report. The market on white meat and white trims is steady. Demand is light. Offerings of fresh white meat are light and spotty. Frozen white meat and white trim offerings remain short to light. Cooked and deli demand light. Grade A consumer sized breasts, institutional sized breasts are generally steady with a steady to firm undertone. Tom drums, fullcut, and V-type wings are firm with the balance of bulk parts mostly steady. Demand light to instances moderate. Offerings short to light. The thigh meat market is steady with a steady to firm undertone. Demand light. Offerings very light to light. Defatted gizzards, hearts and livers steady. Demand and offerings light. Tails steady to firm. Demand and offerings light. Tom necks steady to weak with demand very light. Mechanically separated turkey (MST) market is generally steady. Demand is light for both fresh and frozen. Offerings light to moderate with fresh the most available. Trading slow.

EXPORT MARKET HIGHLIGHTS - Trading slow. Market mostly steady with spot weakness noted on fresh MST. Demand light. Offerings very light to light.