

Overview

We are well underway out of South Georgia; **Zucchini, Bell Pepper Corn** and **Cucumber** are all readily available. Local deals in the north will wrap up this week as cold temps creep into the region last night. Out West, **Squash** and **Cucumber** are ramping up out of Nogales; transition is going to be a bit more of a challenge due to weather, and we will see firmer markets this week.

Tomato production is also transitioning as we see South Georgia growers start to pick snacking tomatoes this week; rounds and Romas next week. Some areas of Florida are also doing clean up picks this week. Overall, the local deals are still coming along at a steady pace but with cooler weather stretching further south we expect to see some of this drop off this week. Good supply available on all varieties.

Mexico continues to see strong production as well but will need to assess Baja production after this weekend's weather.

California production is mixed, and quality is good with fair demand.

Grape season continues to be into excellent production and quality; we should see steady markets now through late October.

Melon supply out of Firebaugh is starting to slow down slightly as we are now on the backside of the California deal; days are getting shorter, and local deals will wind down as well. Quality is outstanding.

Banana and **Pineapple** availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular.

APEAM (The Association of Avocado Exporting Producers and Packers of Mexico) has released updated **avocado** projections, estimating a 12% increase in total crop volume, translating to roughly 2.9 billion pounds—potentially matching or surpassing Mexico's record 2020–2021 crop year. Additionally, APEAM continues to enforce its dry matter standard, now releasing fruit for harvest at a minimum average of 23%. Mexico maintains the majority of the US market share throughout the year, and they are signaling a season to be confident in supply. The size curve is back to a "normal" range, and the overlap of both Loca and Aventajada crops is keeping the pressure on the US to continue building demand. In Colombia, the main season is very close to the beginning of harvest. This next crop is the largest from Colombia and will be available in the spring. With Peru and California exiting, Colombia's continued availability during the months when Mexico is the dominant source will support prolonged market stability into 2026.

In the East, vessel delays are disrupting the movement of Guatemalan products, while ongoing weather challenges in Guatemala are further pressuring production and quality. As a result, availability remains affected for **Snow Peas, Sugar Snap Peas, Baby Peeled Carrots, Colored Baby Peeled Carrots, and French Beans**. It's fair to say the market is very volatile right now. Sporadic weather combined with rain in Salinas is causing many issues with crops. The temperature and the rain have affected harvesting conditions, increased soil borne diseases and severely increased insect pressure. Insect pressure and INSV continue to be reported in the fields and have decreased yields significantly. The limited supplies are driving the market and commodities are escalating very quickly. **Broccoli, Broccolini, Cauliflower, Lettuce, Romaine** and **Romaine Hearts** markets are now all at the extreme level. **Broccoli, Broccolini** and **Cauliflower** are in a severe shortage. You will see shortages, and they will be very severe at times. Growers have extremely limited supplies on each of those commodities. We are seeing pin rot, brown bead, light weights, larvae, mildew and decay. Growers are holding to averages when they can but with the loss of acreage, holding to averages is becoming difficult and the growers are just getting out what they can.

The Diamond back moth is still very active and is expected to affect supplies throughout the Salinas season.

MARKET ALERT

EXTREME	 Broccoli Florets, Crowns, Asian Cut	 Broccolini	 Brussels Sprouts	 Cauliflower
	 Iceberg Lettuce	 Romaine Hearts	 Strawberries	
ESCALATED	 Artichokes	 Asparagus	 Blackberries	 Bok Choy
	 Cabbage Green	 Celery	 Cilantro	 Fennel/Anise
WATCHLIST	 Green Onion	 Hot Pepper, Red Fresno	 Napa	 Romaine VA Blends
	 Blueberries	 Cabbage Red	 French Beans	 Herbs
	 Limes large sizes	 Pineapple	 Spinach	 Spring Mix
				 Lemons small sizes
				 Yellow Squash

Brussels sprouts quality is good, but supplies are still extremely tight. Growers are still holding to very strict averages. The market is still at the extreme level and that is being driven by low yields. We can expect the light supplies to continue through, at least, the end of the month and possibly through November with the holiday pulls coming into play. **Fennel/Anise** have come off of the extreme trigger but are still escalated. Supplies are still a bit light. **Artichokes** also remain escalated. The smaller sizes are at the extreme level. Sizing is small and growers are holding to strict averages. **Bok Choy, Celery, and Cabbage** all remain escalated. Growers are seeing increased demand and decreased supplies. Celery has very light supplies. With the holidays and football season upon us, we expect to see that market stay firm. Cabbage supplies have also gotten very light. Growers are holding to averages when they can, but you will likely see shortages.

The new items added to the escalation list are **Boston/Butter Lettuce, Red Leaf, Green Leaf and Green Onions**. Fall is bringing very significant quality and supply issues and with rain in the forecast all next week for Salinas, we can expect things to be very challenging for the next month until we settle back into Yuma. There is also a large storm that is currently headed for Yuma and is expected to bring heavy rain. We will keep an eye on that and see how it may potentially affect the start of the Yuma season.

OVERVIEW – CONTINUED

The Valencia season is beginning to wind down for some shippers as we approach Fall and **Navels** ramp back up (mid-late October). Navels are projected to be overall larger this season, with smaller fruit remaining tight into 2026. As of now, some suppliers are not anticipating a gap while transitioning to Navels, while others are having a gap in supplies. The quality and flavor profile of the fruit is still looking great overall. Be aware that most shippers are holding averages on Valencia's.

CA **Pink Grapefruit** is projected to go through mid-October. Texas/Desert Rio Grapefruit will begin slowly in mid October and ramp up as we head into December. Availability will be tighter in October for grapefruit and then open back up in late November/December.

Things are continuing to remain tight on small **Lemons** (165 and up) and most shippers are continuing to hold to averages, with anticipation of better supplies in the next few weeks. Size structure is peaking at 140/115ct choice in District 3. Fruit is showing good internal quality with medium to large sizing. Picking is expected to peak in late October.

FRUITS & VEGETABLES

Avocados: Last week, avocado volumes closed at 63.4M pounds for the US, back to stable volume. Mexico rebounded nicely after the no-harvest holiday 2 weeks ago, and strong harvest levels have resumed. Jalisco currently accounts for 14% of Mexico's shipments to the U.S. The Main Crop is averaging 26.7% dry matter, while the Off-Bloom (Loca/Mendez) Crop averages 27.2%. The Main Crop continues to ramp up, now representing about 36.5% of total harvest volume. As programs transitioned back to Mexico, the industry has done a good job sizing up programs to balance demand with what is harvested off the trees. The market has now stabilized on larger sizes, and overall volumes remain plentiful to continue promotions. Approximately 3.9M pounds were harvested in week 40 from California. Sizing continues to peak on 48s and 60s. The California season is nearly complete, with minimal harvest expected through October.

BERRIES

Strawberries: EXTREME Industry demand continues to exceed supply; a prolonged shortage is expected to persist through November. The next four to six weeks will be particularly challenging as supplies remain tight, and pricing holds above seasonal norms. Crops in Oxnard have recovered well following recent weather, producing fruit in the low-to-mid 20s with excellent color, sheen, and flavor, and minimal reports of green shoulders. Central Mexico (CMEX) production is building steadily and should become a stronger player by late October, though crossings remain limited for now. Santa Maria and northern districts have improved but are still showing some bruising and over ripeness, while Salinas and Watsonville are nearing the end of their seasons with declining fruit quality and shortened shelf life. Rain is forecasted next week across Salinas, Watsonville, and Santa Maria, which could effectively end production in those regions and further tighten supply.

District 1 preliminary evaluations are underway, with an early October start anticipated for the season. Imported product is due to wrap up in early October. California **Mandarins** are anticipated to start in November and California **Cara Caras** and **Bloods** will ramp up in December. The California **Garlic** crop is in full swing, and supplies are good.

Bananas: Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, banana quality has been very good.

Table Grapes: Now in peak production out of California. Quality and supply are stable on Flames, Sugraones and Ivory varieties.

Pineapples: WATCHLIST Pineapples will remain very short over the next 14 months at best due to low production in Central America brought on by drought, poor production and loss of acreage. 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 quality and taste are good.

Raspberries: Production continues across Central Mexico (CMEX), Baja, Oxnard, and Watsonville, California, with steady volumes reported from all regions. Overall quality remains good, though some lots are showing minor softness or over ripeness related to recent heat, rain, and humidity in the growing areas.

Blueberries: WATCHLIST Production continues in Central Mexico (CMEX), with supplies remaining tight and expected to stay that way through October. Quality has been strong, with firm fruit, good bloom, and excellent sizing. Shipments from Peru remain delayed, though additional volume is anticipated by mid to late October.

Blackberries: ESCALATED Production remains active in both Central Mexico (CMEX) and Baja, with weekly volume increasing as the fall season progresses. Overall, supplies have improved; however, quality remains variable across regions, with isolated reports of color reversion and some soft or overripe fruit due to recent heat, rain, and humidity. Rain is forecasted in CMEX this week, and daily inbound volumes have already declined as harvest activity slows. Supplies are expected to tighten in the near term, and market levels are trending upward.

CITRUS

Limes: WATCHLIST Supply is extremely tight this week on all sizes with larger sized fruit being the shortest. We do expect to start subbing sizes anytime soon for the larger side of the scale as old crop availability continues to decline. The short-term forecast is lighter supplies through September, and pricing is to continue an upward trend for the coming weeks.

Lemons: WATCHLIST ON SMALL SIZES 165's and below

Lemons are looking extremely tight as we continue towards the end of summer. Most shippers are holding to averages, particularly on the smaller sizes. Fancy grade percentage is down this season due to high wind events, which has impacted fruit quality. There will be little to no relief on the import side of the market if you are not participating on an import program.

WEST COAST LETTUCE

Iceberg: EXTREME Lettuce quality is okay, and supplies have gotten very tight. Growers are holding to averages. We are still seeing signs of INSV and now we are seeing lighter weights and ribby lettuce. With more rain in the forecast, we expect some production gaps over the next few weeks. The market is still very active.

Iceberg VA: EXTREME Quality is okay, and supplies are tight. Growers are holding to averages and prorates should be expected.

Romaine, Romaine Hearts: EXTREME Romaine and Romaine heart quality are okay, but supplies are tight. The market is still trending higher due to increased demand. There have been some reports of light weights, fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Growers are holding to averages.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Steady supply available from all growing regions. Quality is good.

Color Bell Pepper: Steady supply available from all growing regions. Quality is good.

Mini Sweet Pepper: Supply was lighter this week and quality is good.

Mixed Chili Pepper: ESCALATED Supplies were stable this week crossing in McAllen; in the west crossing are light in Otay and California will begin to wind down for the season leading to the transition back to Sinaloa. Red Fresno was the tightest this week and we are recommending Red Fresno consider a sub to red jalapeno when needed. California's quality is good for most items, however we will see lighter production due to weather this week.

Eggplant: Domestic supply is steady out of Fresno and the Local regions in the east. Quality is good. Mexico will start in a few weeks crossing in Nogales.

Slicer Cucumbers: Stable supply crossing through Otay, Nogales and McAllen. We do need to keep a close eye on the tropical disturbance off the coast of Baja as it will bring rain to the region over the weekend. Domestic supply was also stable out of North Carolina and South Georgia. Quality is good out of all growing regions this week.

Imports/Specialties: Blood Oranges will be finishing for the season in the next few weeks. Sizing is running small. Grapefruit is available with light supplies on Fancy grade; choice grade is available. Cara's, Minneolas and Mandarins are all but finished for the season.

Romaine VA: EXTREME Quality is okay, and supplies are limited. Growers are holding to averages.

Boston/Butter Lettuce: ESCALATED Quality is okay, but supplies are tight. We have seen mildew and fringe burn pressure.

Green Leaf and Red Leaf: ESCALATED Quality is okay, but supplies are tight. We have seen mildew and fringe burn pressure. We are also seeing lighter carton weights.

English Cucumbers: Light supply available this week. Quality is good.

Pickles: Light supply expected over the coming week out of Canada, Michigan and Tennessee. Mexico should start ramping up over the coming weeks. Quality remains strong domestically and the fields in Mexico show good development to date.

Green Beans: Supply and quality were mixed this week and demand was light as most growing regions deal with weather-related pressure.

French Beans: WATCHLIST Production remains good, but minor quality issues may be present due to heat, rain, and shipping delays. Fair supply of French beans out of Mexico.

Zucchini/Yellow Squash: WATCHLIST Supply in the west will be tighter this week as summer production out of California slows down and start transitioning to Nogales. We will need to watch the tropical weather hitting the region over the weekend which could impact the early crops out of Sonora. In the east local deals in the north will most likely call it a season due to cooler weather and move to South Georgia. Overall quality is very good. New Crop Hard Squash is available for Fall promotions.

HERBS

WATCHLIST Basil production remains strong out of Colombia and Mexico, though some heat-related quality issues are still being reported. Tarragon supply continues to improve, while imported chervil volumes from Ecuador have slowed due to weather conditions.

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

Strong production in the west continues this week, however we expect to wrap up production in California over the next ten days and transition back to the desert. We will need to keep a close eye on the weather this weekend as we expect to be impacted by the tropical disturbances off the coast of Baja with heavy rain and possible flooding.

Cantaloupe: Strong cantaloupe production continues this week with the overall majority of what is being harvested are larger sizes. Still peaking on 6 and 9ct; 12's and 15's are very limited. Yields have exceeded expectations, but the current sizing pattern will likely mean flexibility of sizing may be required. Overall quality remains at optimum levels – great size, good color and flavorful internal quality. Brix levels are maintaining a 12-14% range as we move into late-season production.

Watermelon: Watermelon volume has started to firm up as local deals wind down for the season. Still seeing fruit available in several districts but that will gradually decline as the weather cools across the country and Fall approaches. Quality remains strong.

Honeydew: Honeydew production is not as strong as the cantaloupe, but the sizing pattern is similar on what is being harvested. We have been seeing primarily 5s and 5Js since the end of last week leaving 6ct very limited. Flexibility of sizing will likely be required in the short term. The long-term forecast for honeydew is questionable as the Mexican growing region of Hermosillo experienced substantial rains three weeks ago which will likely impact the start of that program which is scheduled to begin the second week of October.

MIXED VEGETABLES

Artichokes: ESCALATED Quality is good, but supplies are limited. Growers are holding to averages and there may be some substitutions on sizes. Large sizes are extremely tight.

Asparagus: ESCALATED Baja production continues to be low due to field transitions from the north to the south, and weather. Peruvian volume and sizing continue to improve. Markets are active with less Mexican product and Peru just starting with better volume. Peruvian arrivals will be delayed starting at the end of this week due to mechanical issues with the shipping line. Expect higher markets with more air flown product due to the vessel delays.

Bok Choy: ESCALATED Quality is good but supplies are still limited. The light supplies are driving the market.

Broccoli/Broccoli Crowns: EXTREME Quality is fair, supplies are still extremely limited. Yields are decreasing. The insect pressure has limited harvest. MX still has some supply issues. The market is at the extreme level. We have had reports of Browning, Pin Rot and Larvae from the insects. Most growers are prorating. No one is able to hold to averages. Broccoli is at a severe level.

Brocolini and Sweet Baby Broccoli: EXTREME Quality is fair, and supplies are extremely tight on this item. Growers are prorating. Some growers are only covering 50% of 10-week averages. Pricing is at the extreme level.

Brussels Sprouts: EXTREME Supplies are extremely limited. We still have some growers struggling with yields and growers who pulled early from their fields to cover orders over the past few weeks are now having to wait for the new crops to catch up to demand. Insect pressure and internal browning continue to be reported but the quality looks good. The market is still at the extreme trigger. Growers are holding to averages.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Growers are still harvesting in Monterey County and Kern County district. Supplies are steady and the size on jumbos is good right now. Quality is good and should get even better as growers move forward into Lancaster and Cuyama. They will harvest there through November. When we look at the MX carrots, MX carrot volumes are decreasing due to natural seasonality as well as local markets emerging from Canada this time of year. Production remains the strongest in Guanajuato and Puebla and will start to lean more to Puenla as the year progresses.

Cauliflower: EXTREME Quality is okay, but supplies are tight. Growers are battling insect pressure, and they are holding to averages. Some growers have started to prorate, and the market is now at the extreme level.

Celery: ESCALATED Quality is good, but supplies are extremely tight. As we head into the Fall pull, the market prices are trending upward. Demand has risen due to schools starting back up and with football season in full swing. All Celery is escalated.

Corn, Sweet: Steady supply in the west and transition to South Georgia is underway in the east. Markets eased back this week and should see a smooth transition continue. Quality remains good but we will start to see some maturity issues on the local crops such as smaller ear size and kernel size will decrease once we settle into the fall production regions.

Fennel: ESCALATED The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve. Some growers are holding to 8-week averages, but we have seen some prorates.

Kale: Supplies have improved, and quality is good.

Leeks: Quality and supplies look good.

Garlic: The 2024-2025 California Garlic season is ending, and the California Garlic crop has begun, so you should expect to see some improvement in supply as they move into this harvest. Quality remains good although availability will be held to current commitments until the growers have had enough time to evaluate this crop.

Ginger: Supplies and market are steady.

Green Cabbage: ESCALATED Supplies have tightened up, but quality still looks good. We are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product. Growers are starting to hold to averages.

Green Onions: ESCALATED Supplies are very inconsistent. Quality looks okay.

Mushrooms: Lighter volume available as the summer production winds down; overall forecasts are below expectations and demand is higher. We are quickly approaching that time of year when holiday pull at retail makes supply very short. Quality is good.

Napa Cabbage: ESCALATED Quality and supplies are improving but there is some insect pressure.

Parsley (Curly, Italian): Supplies and quality look good.

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: WATCHLIST Supplies are limited with some growers and quality is still good for now. We have seen some reports of weak texture, discoloration, wilting and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The warm soil temperatures are leading to rapid growth.

Spring Mix: WATCHLIST Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. We have added this item to the watchlist.

Snow Peas and Sugar Snaps: ESCALATED Supply of Guatemalan snow peas and sugar snaps is low due to the weather. Quality is fair. Peruvian production has started to slow down due to market conditions and seasonality. The domestic supply of snow peas and sugar snaps is fair at best. Prices are still elevated.

ONIONS:

The onion market is expected to remain stable throughout Q4. With harvest concluding, all product will ship exclusively from storage in the Pacific Northwest. While we may see a modest increase 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.

POTATOES:

Potato supply in 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, though Norkotahs will continue to make up the majority of the 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:

Suspension Agreement Update: As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes, as growers were notified just Monday evening of the duties being retroactive. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

EAST COAST

Round and Roma Tomatoes: Supply is good on rounds; we will start to see lighter volume on Romas over the coming week. Season will start to wind down over the next two weeks out of Alabama, North Carolina Virginia and Tennessee. We expect to transition to Florida at that point. Some of the upper Midwest/ Pennsylvania and Michigan will wrap up this week and be done for the season. Current quality will be mixed but improving as growing conditions have improved over the past week.

Snacking Tomatoes (Cherry, Grape and Medley): AMPLE supply available out of the summer programs, we are also transitioning to South Georgia and Florida over the next ten days. Quality is outstanding!

California (Rounds and Romas): We have entered the Fall cycle in production and volume is lighter. We are experiencing rain in the Central part of the state and expect to see some limitations to harvesting. We do expect normal availability through the end of the season barring any unforeseen weather events. Quality is mostly good.

MEXICO

Round Tomatoes: Volume is steady crossing through McAllen and Otay. We are keeping a close eye on weather in Southern California and Baja that may cause some production delays over the weekend but for the most part we feel markets will remain stable. Quality at all border crossings has been excellent.

Roma Tomatoes: We are seeing slow demand and increased availability drive the market down this week. We are keeping a close eye on weather in Southern California and Baja that may cause some production delays over the weekend but for the most part we feel markets will remain stable. Quality at all border crossings has been good.

Snacking Tomatoes:

Grape: Excellent supply and weak demand have put downward pressure on price. Quality is good.

Cherry: Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.

Medley Mixed Tomatoes: Good supply crossing through McAllen and Otay. Quality is mostly good.

Tomato on the Vine: Stable Volume available this week.

OTHER FRUIT:

Apples: Red Delicious apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October.

Honeycrisp is experiencing tight supply across all sizes and grades; most USXF/WAXF #2 fruit has finished for the season. The market continues to strengthen, and a short gap is anticipated before new crop availability resumes in August.

Granny Smith apples are in good supply across all sizes and grades, with steady markets expected to continue until the early September harvest. On the organic side, Gala, Fuji, Pink Lady, and Granny Smith apples are available in very limited volumes across most sizes and grades, while Honeycrisp is mostly finished.

DAIRY:

U.S. prices generally firmed this week while EU spot prices continued to fall but EU futures did stabilize a bit. EU milk production for August looks massive and given what we're hearing about spot liquid availability, production is still very strong into early October. Lower prices do seem to be bringing some buyers off the sidelines, but I still have a hard time generally getting bullish when production in the U.S. and EU is up more than 3% with little sign of a slowdown. Right now, it looks like the U.S. gov't shut-down means we won't get the August Dairy Products report on Friday, and if it remains shutdown, we won't get the August im-port/export data on Tuesday either.

BEEF:

This week's harvest is expected to range between 550,000 and 555,000 head, with cattle prices called steady. Spot product availability remains tight. While both cattle and boxed beef prices have eased from their late-summer highs, values remain historically elevated – the Choice cutout is 22% higher year over year, and fed cattle prices are up 23%. Chicken and pork continue to provide attractive alternatives for price-sensitive consumers, yet beef demand remains resilient. The market appears to have found a bottom, with futures stabilizing and cutouts gaining a few dollars early this week. Looking ahead, the market may not rebound sharply, but gradual strength is expected to build through October as demand improves and supplies remain constrained.

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: New crop available out of California.

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

Cherries: Winding down for the season.

Stone Fruit: Peaches, Nectarines, Plums available out of the PNW as winding down.

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

Quince: Limited supply available this week.

SHELL EGGS:

National FOB shell egg weighted average prices are mixed. The undertone is weak. Retail demand is moderate to instances fairly good. Food service demand is moderate. Offerings are moderate. Supplies are light to instances fully adequate. Market activity is slow to moderate. California weighted average delivered prices are mixed. The undertone is weak. Retail and food service demand is light to fairly good. Offerings are moderate to at times available. Supplies are moderate to fully adequate. Market activity is slow to moderate.

PORK:

Prices across the pork cutout are called mostly steady this week. Increased production is being met with adequate demand, allowing suppliers to clear product without making large price concessions. With National Pork Month underway, retail featuring has improved, supporting overall movement. Hams are benefiting from stronger pre-holiday domestic demand and renewed export interest, aided by a weaker U.S. dollar that makes American pork more competitive globally. Bellies and trim continue to show softness as production increases, while butts and loins are trading mostly steady to slightly weaker, depending on packer position.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - The market on fresh and frozen 8-16 lb. hens and 16-24 lb. toms is steady to firm with 8-16 lb. hens strongest. Fresh and frozen Grade A 8-16 lb. hens and 16-24 lb. toms demand light. Offerings short to light at best. Frozen commodity 8-16 lb. hens at 165-190 and 16-24 lb. toms at 165-187 cents fob offered for current shipments. Trading slow on frozen basted equivalent 16-24 lb. toms at 182 cents fob for current deliveries.

The market on white meat and white trims is steady to firm. Fresh tom breast meat demand light to good, mostly moderate to good. Demand on the balance of white meat and white trims moderate to good. Offerings of fresh tom breast meat short to light, balance of white meat and trims light at best. Grade A consumer sized breast market is steady to firm. Demand light. Offerings short to light. Institutional sized breast markets are steady to firm. Demand light to moderate.

Offerings short to light. The frozen tom and hen bulk parts markets are steady with a firm undertone. Demand moderate to good. Offerings short to light. The thigh meat market is steady with a firm undertone. Demand moderate to good. Offerings very light to light. Hearts, livers and defatted gizzards steady. Demand and offerings light. Frozen mechanically separated turkey (MST) market is steady, fresh steady to barely steady. Demand light to moderate, best on frozen. Offerings of fresh MST light to moderate. Frozen MST offerings light at best. Trading slow.

EXPORT MARKET HIGHLIGHTS - Trading slow. Market generally steady. Demand moderate. Offerings light at best.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS - Prices are trending steady for whole fryers; about steady for WOGS. Supplies of three pound and heavier size WOGS are moderate to heavy; lighter sizes are mostly moderate. Demand is light to moderate. Floor stocks fully sufficient. Market activity is slow. In the parts sector, prices are trending steady to weak for dark meat cuts; weak for breast cuts, tenders and wings. Supplies of dark meat items are at least moderate to heavy with legs, leg meat, thighs and thigh meat in the longest position. Bone-in breasts, fronts and wings are readily available; b/s breasts and tenders are moderate to heavy with select and medium sized b/s breasts being discounted. Demand is light to moderate. Market activity is slow.

EXPORT MARKET HIGHLIGHTS - Export demand is light to moderate.



Fresh Is Everything