

## Overview

We are well underway out of South Georgia; **Zucchini, Bell Pepper, Corn** and **Cucumber** are all readily available. Out West, **Squash** and **Cucumber** are ramping up out of Nogales. Transition is going to be a bit more of a challenge due to the recent weather caused by Tropical Storms Priscilla and Raymond. Both storms brought rain and localized flooding to areas of the Baja as well as Sonora.

**Tomato** production is also transitioning, as we see South Georgia growers starting to pick snacking tomatoes this week; Rounds and Romas next week while Florida starts to gain momentum.

**Grape** season continues with excellent production and quality; we should see steady markets now through late October. **Melon** supply out of Firebaugh is mostly done with production moving to Yuma, however, rain and low yields have supplies tight. **Banana** and **Pineapple** availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular.

**Avocado** supply out of Mexico remains strong, with stable volumes across all sizes. Demand has strengthened in recent weeks, fueled by heavy promotional activity and attractive prices. Total industry inventories for week 43 were reported at 55.7 million pounds. U.S. arrivals for week 44 are projected to reach 50.8 million pounds. Mexican product is showing an increase presence of Lenticel, brown spots that develop on the surface of the fruit caused by heavy rain. Lenticel spotting will have no effect on the internal quality of the fruit. Mexican corn growers went on strike last week and used road blockades as part of their protest. Avocado growers have not joined the strike, but the road blockades on key transit corridors could slow down avocado supply into the US. California was able to harvest 2.6 million pounds of product in week 43, but there will be significantly less product moving forward. Colombia crop is in full swing, but most of their volume is still headed to Europe.

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**.

**Strawberry** fields in southern California have recovered from recent rainfall and humidity, and while production in both Central Mexico (CMEX) and southern California remains strong, volumes are not sufficient to offset seasonal declines from Salinas, Watsonville, and Santa Maria.

November typically represents the tightest supply period and highest pricing of the year, with overall market relief not expected for another three to five weeks. Transition is a few weeks away and the market continues to be very volatile. Sporadic weather combined with rain in Salinas is continuing to cause many issues with crops. The rain has affected harvesting conditions and quality. Growers are still seeing increased soil borne diseases and a large presence of insect pressure. The insect pressure and INSV along with the weather are all contributing factors to the decreased yields. The limited supplies are driving the market and commodities are still escalating. **Broccoli, Broccolini, Cauliflower, Lettuce, Romaine** and **Romaine Hearts** markets are all extremely limited and the markets remain at the extreme level. You will see shortages on these items, and they will be very severe at times. 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 has become difficult and the growers are just getting out what they can.

## MARKET ALERT

|           |                                                                                                                                             |                                                                                                                            |                                                                                                                     |                                                                                                                           |                                                                                                      |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| EXTREME   | <br>Boston/Butter Lettuce                                 | <br>Broccoli Florets, Crowns, Asian Cut | <br>Broccolini                   | <br>Brussels Sprouts                   |                                                                                                      |
|           | <br>Cauliflower                                           | <br>Green & Red Leaf                    | <br>Iceberg Lettuce              | <br>Lettuce<br>VA Blends/Better Burger |                                                                                                      |
|           | <br>Romaine Hearts                                        | <br>Romaine<br>VA Blends                | <br>Snow and Sugar Snap Peas     |                                                                                                                           |                                                                                                      |
| ESCALATED | <br>Artichokes                                            | <br>Arugula                             | <br>Asparagus                    | <br>Blackberries                       | <br>Bok Choy      |
|           | <br>Cabbage Green                                         | <br>Celery                              | <br>Cilantro                     | <br>Fennel/Anise                       |                                                                                                      |
|           | <br>Hot Peppers<br>Jalapeno, Serrano, Caribe, Red Fresno | <br>Kale                               | <br>Napa                        | <br>Spring Mix                        | <br>Strawberries |
| WATCHLIST | <br>Blueberries                                         | <br>Cabbage Red                       | <br>Cantaloupe                 | <br>French Beans                     | <br>Herbs       |
|           | <br>Green Onion                                         | <br>Honeydew                          | <br>Lemons<br>small sizes      | <br>Limes<br>large sizes             |                                                                                                      |
|           | <br>Pineapple                                           | <br>Spinach                           | <br>Yellow Squash/<br>Zucchini |                                                                                                                           |                                                                                                      |

The Diamond back moth is still very active and is expected to affect supplies throughout the Salinas season. Brussels sprouts quality is okay, but supplies are still extremely tight. Growers are still holding to very strict averages when they can, but we have seen some prorates. 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** are still escalated. Supplies are still a bit light. **Artichokes** also remain escalated. Sizing is small and growers are holding to strict averages. **Bok Choy, Celery, Spring Mix, Arugula** and **Cabbage** all remain escalated. Growers are seeing increased demand and decreased supplies. **Celery** also 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.

## Overview – continued

**Sugar Snap peas, Snow Peas, Boston/Butter Lettuce, Red Leaf and Green Leaf** remain at the Extreme Trigger with very light supplies. Fall is continuing to bring very significant quality and supply issues. Rain and inconsistent temperatures have only added to these issues. We can expect things to be very challenging as we get closer to transition. Disruptions in supplies should be expected.

Yuma has also experienced rain and unusual weather patterns, so transition is expected to be bumpy. We will likely see gaps in the supply chain. We will keep an eye on the weather and continue to send out updates and information as we receive it.

The **Valencia** season has mostly concluded, and Navels are in full swing. Navels are projected to be overall larger this season, with smaller fruit remaining tight into 2026. Be prepared to sub for larger sizes. The quality and flavor profile of the fruit is still looking great overall. All averages should be lifted as we enter into our new program.

## FRUITS & VEGETABLES

**Avocados:** A 74.2-million-pound harvest was reported for week 43, with 59.4 million pounds shipped to the U.S. Jalisco currently accounts for 10% of Mexico's shipments to the U.S. Both the Main Crop (27.5% dry matter) and the Off-Bloom Crop (28% dry matter) are showcasing consistent sizing, peaking on 48s and 60s. Due to the rain during this time of the season, there is an increased presence of Lenticel. Lenticel is small brown spots that develop on the skin after harvest, especially during the rainy season. Lenticel has no effect on internal quality. The Main Crop continues to ramp up, now representing about 53.7% of total harvest volume. APEAM continues to enforce its dry matter standard, now releasing fruit for harvest at a minimum average of 23%. Approximately 2.6M pounds were harvested in week 43 from California. Sizing continues to peak on 48s and 60s. The California season is nearly complete, with minimal harvest expected through November.

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

CA Pink **Grapefruit** is projected to be finishing up. Texas/Desert Rio Grapefruit has begun slowly in and will continue to ramp up as we head into December. Availability for grapefruit should be opening back up in late November/December.

Things are continuing to remain tight on small **Lemons** (165 and up). Size structure is peaking at 140/115ct choice in District 3. Fruit is showing good internal quality with medium to large sizing. District 1 experienced beneficial rain last week. Suppliers continue to evaluate the crop, with harvesting beginning. Fruit sizing is trending medium to large and is grading well overall. The last of the District 2 crop has been sold. They anticipate a strong, clean harvest next week. Conditions remain favorable, though there's still a long autumn and winter ahead. Crews in district 3 are picking at full speed, and the crop is looking clean with a high percentage of Fancy grade fruit. Harvest is expected to continue steadily and wrap up by December 31. California Mandarins are anticipated to start in November and California Cara Caras and Bloods will ramp up in December.

The California Garlic crop reports that supplies are good.

**Table Grapes:** Fall production continues out of California, and demand has been steady. Quality has been mixed due to recent rains; those that have covered their crops are seeing less issues over fruit that has not been covered such as splits on reds, greens are starting to see issues like waterberry, ambering, and smaller sizing. Varieties available currently: Green-Autumn Kings, Autumn Crisp. Red Varieties- Autumn Royals, Scarlets, Globes. Blacks- Sweet Sapphire. We expect to be into storage fruit by the second week of November.

**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.

## BERRIES

**Strawberries: ESCALATED** Demand continues to exceed supply. The Oxnard, California region is recovering well following recent rains, with harvests producing high-quality, full-color strawberries and minimal quality concerns. All other California production areas are winding down for the season or operating at minimal levels. Central Mexico (CMEX) production is increasing with good-quality fruit and is expected to continue ramping up through the end of the year. While both southern California and CMEX are performing well, their volumes are not sufficient to offset the seasonal declines from Salinas, Watsonville, and Santa Maria. November typically represents the tightest supply period and highest pricing of the year. Overall relief is not expected for another 3-5 weeks.

**Raspberries:** Production continues across Central Mexico (CMEX), Baja, and Oxnard. Supplies have tightened following recent rainfall in the growing regions and as the Watsonville season ends and Oxnard volumes decline. Overall quality remains good, though some soft or overripe fruit is being observed due to recent heat, rain, and humidity.

**Blueberries: WATCHLIST** Production remains active in Central Mexico (CMEX), with steady supplies supported by increased arrivals from Peru helping to balance overall industry availability. Mexican quality and sizing continue to be very good, contributing positively to market stability.

**Blackberries: ESCALATED** Production remains active across Central Mexico (CMEX), Baja, and Watsonville, with CMEX and Baja volumes increasing steadily each week heading into the fall. Overall supplies have improved; however, quality remains inconsistent across regions, with some reports of color reversion. Isolated occurrences of soft or overripe fruit are also being noted due to recent heat, rain, and humidity in the growing areas.

## CITRUS

**Lemons: WATCHLIST ON SMALL SIZES 165's and below**

Small lemons are continuing to be a tight commodity. With most crops producing a larger size structure, they continue to be challenging.

**Limes: WATCHLIST** Supply continues to be extremely limited on larger sized fruit; growers are forecasting this trend to continue through November. Pricing and quality will be mixed over the next few weeks.

**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.

## WEST COAST LETTUCE

**Iceberg: EXTREME** Lettuce quality is fair, but supplies are extremely tight. Growers are prorating. At times the prorates are extreme. We are still seeing signs of INSV, 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. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

**Iceberg VA: EXTREME** Quality is fair, and supplies are tight. Growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

**Romaine VA: EXTREME** Quality is okay, and supplies are extremely limited. Growers are prorating. The prorates can be extreme. should be expected. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

**Romaine & Romaine Hearts: EXTREME** Romaine and Romaine heart quality are fair, but supplies are extremely tight. The market is still trending higher due to increased demand. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. Insect pressure and sclero/INSV have also been reported. For the hearts, we are seeing very little heart material. Growers are prorating. The prorates can be extreme. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

**Boston/Butter Lettuce: EXTREME** Quality is okay but supplies extremely are tight. We have seen mildew and fringe burn pressure. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

**Green Leaf, Better Burger and Red Leaf: EXTREME** Quality is fair, and supplies are extremely tight. Prorates should be expected. We have seen mildew and fringe burn pressure. We are also seeing lighter carton weights. The weather has affected harvesting and quality. This is causing additional supply issues.

## 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 lighter this week as this week's rain has caused harvest delays and ongoing quality issues on several varieties. We expect to see some volatility through mid-December when we start production out of Sinaloa. Red Fresno was the tightest this week and we are recommending Red Fresno consider a sub to red jalapeno when needed.

**Eggplant:** Domestic supply is steady out of Fresno; the local summer deals should wrap up this week and move to South Georgia over the next 2 weeks. Quality is good. Mexico crossings will ramp up this week.

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

**Slicer Cucumbers:** Supply crossing through Olay, Nogales and McAllen may be lighter this week due to harvest delays caused by this week's weather in Baja and Sonora. Domestic supply was also stable out of South Georgia. Quality is good out of all growing regions this week.

**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 out of Guatemala remains good, with quality showing continued improvement. We do still see vessel delays on the east coast. Supplies of French beans from Mexico are fair, supporting overall availability.

**Zucchini/Yellow Squash:** **WATCHLIST** Supply is light on both coasts on in the west will be tighter this week as summer production out of California slows down and starts transitioning to Nogales. In the east, the local deals out of 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.

## MELONS

Much lower yields than projected are being realized in the Yuma region. This is attributed to some inclement weather that was seen in early September that caused a bloom drop leading to fewer melons to be harvested. This has not only impacted current harvests, but it is now anticipated that the Fall season could finish 7-10 days earlier than anticipated. Rains from two weeks ago have severely impacted some growers in Arizona leaving them short, which has caused a flurry of activity. Imported melons expected in two weeks could relieve some of the pressure off Arizona.

**Watermelon:** Domestic watermelons can be found on both coasts; however, there is an upward trend in prices due to a decrease in supply. The supply of Mexican watermelons via Texas and Nogales has been constrained due to production challenges stemming from rainfall experienced last month.

**Cantaloupe:** **WATCHLIST** Sizing on new cantaloupe in Yuma initially was peaking on mostly jumbo fruit with a very small percentage (less than 2%) being 12s. Quality has been surprisingly good following the rain, but additional effort has been required to wipe down melons as best as possible. Remnants of mud/dirt are to be expected as it is inevitable to have a presence. Melons have been firm to hard with solid brix levels in the 11-14% range. Flexibility of sizing may be required at time of loading dependent upon what the fields provide that day.

**Honeydew:** **WATCHLIST** Honeydew production currently is extremely limited. Fewer domestic dews are planted during the fall period because of weather volatility in the region with more of a reliance on Mexican imports. Crossings through Nogales have been very limited so far this season, but it is expected to increase hopefully in the coming days to relieve some of the pressure in the market. Scarring is a common characteristic at this time of the year, and mud/dirt will also be seen. Sizing has been almost exclusively 5/5Js with 6s being mostly nonexistent. Flexibility of sizing may be required at time of loading.

## HERBS

**WATCHLIST** Basil production remains strong from Colombia and Mexico, though some quality issues have been reported due to heat in the fields. Imported chervil supplies continue to be limited as weather in Ecuador impacts production. Overall, herb availability is steady with good quality, except for sage, which remains tight due to weather-related challenges. Quality across some items may continue to vary depending on field 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               |



## 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** Mexican supplies have improved this week on smaller sizing out of Hermosillo, though larger sizes remain limited. Peruvian volume and sizing continue to strengthen, supporting overall availability. Markets remain active due to the ongoing shortage of larger-sized Mexican product.

**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. 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. The weather has affected harvesting and quality. This is causing additional supply issues.

**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. The weather has affected harvesting and quality. This is causing additional supply issues.

**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 okay. The market is still at the extreme trigger. Growers are holding to averages when they can, but we have seen prorates.

**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 Puebla as the year progresses.

**Cauliflower: EXTREME** Quality is fair, and supplies are extremely tight. Growers are battling insect pressure, and they are holding to averages. Some growers have started to prorate, and the market is still at the extreme level. The weather has affected harvesting and quality. This is causing additional supply issues.

**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. Organic Celery is at the extreme trigger.

**Corn, Sweet:** Lighter supply in the west and strong out of South Georgia. We are in all new crop and quality is good.

**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: ESCALATED** Supplies are limited, and quality is okay. Hail damage and other weather-related factors have affected harvesting. The market is now escalated.

**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 are extremely tight, and quality is okay. 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. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to decrease as we get closer to transition.

**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: ESCALATED** Supplies are limited with some growers and quality is okay. We have seen some reports of weak texture, discoloration, wilting, moderate wind damage and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The weather has heavily affected harvesting and quality. This is causing additional supply issues.

**Spring Mix: ESCALATED** Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. The hail has really affected quality, and you will see the damage in some packs. The weather has affected harvesting and quality. This is causing additional supply issues. The market is now escalated.

**Snow Peas and Sugar Snaps: EXTREME** Supplies of Guatemalan snow peas and sugar snaps remain extremely limited as adverse weather continues to impact production, and availability is not expected to improve until mid-November. Peruvian volumes also remain light due to normal seasonal declines, while domestic supplies are limited and prices remain very elevated. Mexican production is expected to begin within the next two to three weeks, which should provide some relief to the market once volume increases.

## 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.

## 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. 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 Tomatoes:** Supply ramping up out of Ruskin and Palmetto; South Georgia production is also stable. Quality is good.

**Roma Tomatoes:** Supply is the shortest and should increase over the next ten days. Overall quality is mixed and should improve as volume increases out of Florida.

**Snacking Tomatoes (Cherry, Grape and Medley):** AMPLE supply available out of the summer programs, we will start transitioning to South Georgia and Florida over the next week. Quality is outstanding!

**California:** Mostly done for the season due to weather.

## 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 until the new crop returns in August.

## 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.

## MEXICO

**Round Tomatoes:** Volume is steady crossing through McAllen and Otay. Quality at all border crossings will be mixed this week and should improve over the next seven to ten days.

**Roma Tomatoes: ESCALATED** Volume is improving through McAllen and Otay. Quality is 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.

**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:** Done for the season.

**Stone Fruit:** Done for the season.

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

**Quince:** Limited supply available this week.

## **DAIRY:**

Same story as the past three months. Supply is outstripping demand and prices are falling, although the decline generally slowed this week. September milk production in New Zealand was a little stronger than expected with the majority of the growth being driven by imported PKE. Weekly collections across Germany, France and UK are still growing 4 to 6% and headline Dutch production for September was up 6.4%. We were supposed to get Sep. milk production data from the USDA but didn't due to the shutdown, my component adjusted forecast is +5.2%. The lower prices will eventually boost demand and slow production, but that likely won't happen until sometime in 2026.

## **BEEF:**

Analysts expect live cattle to trade between \$240/cwt and \$250/cwt through November and December, assuming consumer demand remains resilient. Much of this outlook hinges on holiday rib demand, a key driver during the season. For January and February, forecasts call for cattle trading in the \$235-\$245/cwt range. Roast demand continues to build, even as temperatures remain mild and no significant cooling is expected over the next 10 days.

Futures markets have been extremely volatile in recent days as traders assess the Administration's plan to lower beef prices. Cash cattle are likely to trade lower this week amid the recent weakness in futures. Cutout values continue to firm, supported by strength in the loin and rib primals, while grinds and other items remain steady.

Packer margins have improved modestly but are still estimated at around -\$130 per head. Meanwhile, turkeys are becoming the retail focus as grocers shift promotional attention toward the upcoming holidays.

## **CHICKEN:**

**DOMESTIC MARKET HIGHLIGHTS** - Prices are trending steady for WOGS and whole fryers. Supplies are moderate for current needs. Demand is light to moderate. Floor stocks sufficient. Market activity is light to moderate. In the parts sector, prices are trending at least steady for b/s breasts and tenders; steady for wings, fronts and bone-in breasts; steady at best for dark meat cuts. Supplies of b/s breasts are light to moderate; tenders, wings, fronts and bone-in breasts are moderate; dark meat items at least moderate for current needs. Demand is light to moderate. Market activity is slow to moderate.

**EXPORT MARKET HIGHLIGHTS** - Export demand is light to moderate.

## **SHELL EGGS:**

National FOB shell egg weighted average prices are steady to higher. The undertone is fully steady to higher. Retail demand is generally moderate. Loose egg demand is moderate to at times fairly good. Offerings are light to moderate. Supplies remain in a range of very light to instances fully adequate. Market activity is moderate. California weighted average delivered prices are steady to higher. The undertone is steady to firm. Retail demand is moderate. Food service movement is moderate to instances fairly good. Offerings are light to moderate. Supplies are mixed, mostly moderate. Market activity is moderate.

## **PORK:**

Weekly harvest levels are expected to remain near 2.6 million head through November and into December. As the government shutdown continues, data gaps are widening, forcing market participants to rely on best estimates for key indicators such as monthly meat prices, production data, cold storage stocks, and export figures.

Loins and trim are expected to decline further as production increases, while hams should benefit from seasonal holiday demand. However, the absence of updated export data to Mexico makes it more difficult to gauge the true domestic supply and demand balance. Hog prices continue to trend lower but remain \$10-\$12/cwt higher year-over-year. Belly prices remain weak amid lackluster fast-food demand.



## **TURKEY:**

**DOMESTIC MARKET HIGHLIGHTS** - The market on frozen 8-16 lb. hens is steady and frozen 16-24 lb. toms steady to weak. Frozen Grade A 8-16 lb. hens demand light to moderate and 16-24 lb. toms demand light with some buyers looking at alternative proteins. Offerings short to light on frozen 8-16 lb. hens and 16-24 lb. toms light. Frozen commodity Grade A 2025 production 8-16 lb. hens offered at 165-183 and 16-24 lb. toms at 153-183 cents FOB for current shipments. Trading slow. Frozen basted equivalent 8-16 lb. hens 168 Fob and 1624 lb. toms 161 cents fob for current shipments.

The market on fresh tom breast meat and destrapped tenderloins is steady, balance of white meat and white trims is steady to instances firm. Demand on fresh tom breast meat and fresh destrapped tenderloins moderate, balance of white meat and white trims moderate to good. Offerings of fresh tom breast meat and fresh destrapped tenderloins light balance of white meat and white trim offerings very light to light. Cooked and deli demand moderate and seasonally slowing with the cooler weather. 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 tom neck market is steady to barely steady, balance of tom and hen bulk parts markets steady to instances firm with tom 2-joint wings strongest due in part to the price spread with tom fullcut wings. Demand light to good, mostly light to moderate with tom necks slowest. Tom neck offerings light to moderate, balance of hen and tom parts short to light. The fresh thigh meat market is steady, frozen at least steady. Demand moderate. Offerings very light. Hearts, defatted gizzards and livers steady. Demand light to moderate. Offerings light. Frozen mechanically separated turkey (MST) market is steady, fresh steady to weak. Demand light to moderate. Offerings of fresh MST moderate to instances moderately heavy with some excess production going to pet foods, frozen light at best. Trading slow to moderate.

**EXPORT MARKET HIGHLIGHTS** - Trading slow. Market generally steady. Demand light to moderate. Offerings mixed, mostly light.

# ***HAPPY HALLOWEEN!***



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