



Fresh Is Everything

Weekly Market Review

October 9, 2026

Overview

Tomato production continues to decline out of South Carolina, Tennessee, and Virginia due to a combination of weather-related pressure and the season coming to a close. We will continue to see upward pressure on the markets this week, particularly Snacking Tomatoes, which are the tightest, and there is a good chance, we will see some supply interruptions over the next three weeks. We are watching a storm off the coast of Baja that could impact the fall vegetable crop in Southern Baja and possibly Sonora. We will continue to assess this storm's path and update once it has passed. Mexico's production of Rounds and Romas is going to be lighter this week and combined with higher demand out of the East, we are seeing higher markets. Grapes, Cherries, and Snacking Tomatoes will be lightest this week due to transition gaps in the east between summer and fall crops while import numbers are down for the next few weeks, pushing the market very high. We do expect some supply interruptions over the next three weeks and may need to sub over to other Tomato items. In California, Tomato production remains steady, but demand is much higher. We do expect the season to wind down over the next couple of weeks when production should then be reliant on Mexico and Florida.

The **Lime** market remains firm on all sizes, current forecasts call for smaller fruit to be the majority of production with 175s and larger still extremely limited, and substitutions with smaller sizes are necessary over the next several weeks.

Hot Pepper production is expected to stabilize across most varieties. **Zucchini/Yellow Squash** were both tight this week as well. Steady production is expected on slicer **Cucumbers**. U.S. **Table Grape** supplies are steady this week, and quality is outstanding on the new crop out of California. We will also start to see the impacts of the Canadian Tariffs on **Mushrooms** affecting the industry over the coming weeks. In addition to these increases, we will also see costs rise across the domestic supply chain, which mostly impacts growing and operating costs.

Hurricane Polo Assessment: We are assessing the impacts of Hurricane Polo as it has crossed through Baja, which sustained damage to production in Ciudad Constitution as well as Vizcaino, but it was Guaymas and San Carlos on the mainland that experienced significant damage while Hermosillo was saved. The short-term effects of this storm on the fall vegetable and Melon crop will be significant over the coming weeks we feel mostly in the Melon deal.

Insect pressure, INSV, and Sclerotinia continue to impact production and are expected to remain a challenge throughout the Salinas season. Demand is increasing, and supplies have become extremely limited. Quality issues are also on the rise as disease and insect pressure continue to increase, particularly in **Leafy Greens** (Lettuce, Romaine, Green Leaf, etc.), **Cabbage**, **Broccoli**, and **Cauliflower**. Diamondback Moth/insect pressure is heavy and is a large contributor affecting Cabbage,

EXTREME					
	Artichokes	Asparagus	Boston/Butter Lettuce	Broccoli Crowns / Florets	Green/Red Leaf
ESCALATED					
	Green Onion	Lettuce	Romaine/Romaine Hearts	Snow Peas	Tomatoes Grape, Cherry
WATCHLIST					
	Broccolini	Brussels Sprouts	Cabbage Green	Cauliflower	Cilantro
	Limes 150's & larger	Napa	Parsley Italian	Spinach	Squash
	Strawberries	Sugar Snap	Tomatoes Rounds, Romas	White Asparagus	
	Blackberries	French Beans	Herbs	Potatoes	Raspberries
	Small Citrus all varieties	Spring Mix	Sweet Potatoes	Warm Veg: Western Mexico Bell Pepper, Cucumber, Eggplant, Soft Squash	

Broccoli and Cauliflower supplies. Growers are expected to hold to averages on all Lettuce, Romaine, Broccoli and Cabbage commodities when they can, but prorates should be expected. Some of these prorates may be severe. **Green Onions** are also still extremely limited and will likely be prorated. We are approximately 6 weeks away from transition and supplies/quality will be challenging until we settle into Yuma.

Avocado supplies remain stable as strong Mexican production supports the transition away from California and Peru. The shift from Loca to Aventajada is expected to proceed smoothly, maintaining consistent availability throughout the fall. Medium and large fruit offer the strongest promotional opportunities, while jumbo (40s & larger) availability is improving but remains priced at a premium. Steady demand and continued Mexican harvests are expected to support balanced markets and promotional opportunities through October and November.

California **Cantaloupe** and **Honeydew** production is expected to continue through at least next week, although virus pressure in lateseason fields could bring the Central California season to an earlier conclusion than the originally planned week of October 12. Yuma program is scheduled to begin that week with limited initial production, while the impact of recent Arizona rainfall is still being assessed. Sizing has shifted smaller due to weaker fields, cooler temperatures, and reduced daylight, with larger fruit already commanding premium pricing. Internal quality remains consistent, with strong sugar levels. Availability may be tight during the regional transition, particularly larger sizes.

Berry availability remains uneven as domestic production winds down and imported supplies build. Recent heat has reduced marketable volumes and increased quality concerns, particularly for Strawberries, creating upward pricing pressure and a greater risk of reduced shelf life. Increasing **Raspberry** and **Blackberry** production in Mexico is supporting availability, while Peruvian **Blueberries** offer excellent quality despite limited volumes and gaps in organic arrivals. Near-term supply challenges are expected to persist, with Strawberry constraints potentially continuing through December and Blueberry availability improving as Mexico and Chile contribute additional volume.

FRUITS & VEGETABLES

Avocados: Avocado supply conditions remain stable, with Mexico expected to maintain strong, consistent production throughout the fall. Increasing Mexican harvest volumes are supporting a smooth transition as the California and Peru seasons wind down. The industry has begun transitioning from the Loca crop to Aventajada, with abundant Loca supplies helping maintain availability during the changeover. Seasonal rainfall and favorable growing conditions have supported a larger size profile, with medium and large fruit offering the greatest availability. Promotional opportunities remain attractive, particularly on 40-count and 48-count fruit, while improving jumbo availability continues to carry a price premium. California production is nearing completion, with limited northern harvests expected through October and some large and jumbo fruit available for select West Coast promotions. Peruvian arrivals are also approaching their seasonal conclusion, with final shipments expected within two weeks and remaining volumes concentrated in large and jumbo sizes. Steady demand and continued Mexican production are expected to maintain balanced market conditions and support promotional programs throughout October and November.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including **Lemons** and **Oranges**, with fruit generally trending larger. California **Valencias** are in full swing. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. Grapefruit supplies are a mixed bag with some suppliers anticipating a potential gap in supplies and others sitting comfortably. Be in close contact with your supplier on this matter.

El Niño: While it's still too early to predict how severe the impacts of El Niño will be, we do know that impactful storms will likely hit the Central Coast. We will be adding updates as we receive them, but for now all indicators are pointing towards a strong El Niño taking shape over the next several months. Yuma will likely see increased precipitation, so growers are planning to place crops across various growing regions to try to mitigate supply issues. The growers do have plans in place and will be acting accordingly to try to minimize the effects of the weather event as much as they can.

Table Grapes: Production is stable out of California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Scarlett Royals, Allisons, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season. Black grapes will start to decline over the next 3-4 weeks.

Bananas: Banana supply will be stable, but production curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next, expect them to be higher due to rising fuel costs.

Pineapples: Supplies have tightened up, and we have seen an increase in open market pricing. Contract volume is holding firm, but open market availability has dropped. Suppliers are expecting this to last for 2 to 4 weeks. This should not affect quality, which has been good overall.

BERRIES

Strawberries: WATCHLIST Strawberry supplies remain tight as elevated temperatures across California and Baja, Mexico increase bruising, softness, and premature breakdown, reducing shelf life. Santa Maria volumes have declined approximately 25% to 35% as growers discard fruit with quality issues and fields experience a slow recovery in flower development. Watsonville and Salinas production continues to decline seasonally, with additional fruit diverted to processing. Overall quality is good to fair, with smaller, misshapen, and pale fruit also reported. Mexico shipments into Texas are expected to begin the week of October 12, but limited availability and upward pricing pressure are expected to persist through the remainder of the California season, approximately through December. Quality challenges are anticipated over the next six to eight weeks as supply transitions to Mexico and Florida.

Raspberries: WATCHLIST Raspberry volumes are increasing in Mexico, with direct exports to Texas underway. Watsonville production is expected to remain steady over the next two weeks, providing continued domestic supply during the seasonal transition. Quality is generally good, although some softness and leaking fruit are being reported in both conventional and organic shipments from Mexico. Increasing Mexican production should support availability as the category transitions toward fall and winter growing regions.

Blackberries: WATCHLIST Blackberry volumes are increasing in Mexico, with direct exports to Texas underway, although organic availability remains light. Watsonville production is expected to remain steady over the next few weeks, but overall availability is limited, and organic volumes are expected to decline. Quality is generally good across both regions, with some softness and leaking fruit reported. Increasing Mexican production should provide additional supply as California winds down, although organic availability is expected to remain constrained.

Blueberries: Pacific Northwest Blueberry production has concluded, shifting the primary supply source to Peru. Volumes are slightly below expectations and are forecast to remain steady but limited through October, consistent with typical seasonal availability. Peruvian fruit quality is excellent across conventional and organic offerings. Organic arrivals are particularly light, with a gap expected during the weeks of October 12 and October 19 before limited weekly arrivals resume in late October. Overall supplies are expected to improve in December as Mexico and Chile contribute additional volume.

CITRUS

Limes: ESCALATED Supply will get lighter, and markets are firming up as current regional product will decline. We will continue to see size issues with distribution will skew heavily toward 175s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next several weeks. Overall quality will be a concern; external blemishes, oleocellosis and limited shelf life may occur.

Lemons: Small Lemons are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Domestic Navels are all wrapped up!

Valencias: California Valencias have begun and are projected to have strained supplies on small sizes.

Mandarins: Import Mandarins are in full swing. Domestic mandarins will begin this November.

Grapefruit: California grapefruit has mixed availability.

WEST COAST LETTUCE

Iceberg: EXTREME Lettuce quality is okay and supplies are extremely limited. Prorates should be expected. There has been an increase of disease and insect pressure. We have seen some reports of internal burn, wind burn and soil-related defects. We are also seeing smaller heads and light weights. The market is trending up. September will be challenging for lettuce. Lettuce is now at the extreme trigger.

Iceberg VA: EXTREME Quality is fair and supplies are extremely limited. Prorates should be expected.

Romaine VA: ESCALATED Quality and supplies are fair. We are still seeing more core in the bags and some mildew. Growers are holding to strict averages when they can but prorates should be expected.

Boston/Butter Lettuce: EXTREME Quality is good, but supplies are limited.

Romaine & Romaine Hearts: EXTREME Supplies and quality are fair. There have been reports of light weights, tip and fringe burn. We are seeing high core, soil concerns, and insect pressure. Yields are being affected. Baby Romaine disease pressure has also increased, and supplies will be light. All Romaine items are now at the extreme level. Growers are holding to strict averages when they can but prorates should be expected.

Green Leaf, Better Burger and Red Leaf: EXTREME Quality is fair and supplies are limited.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: **WATCHLIST** Supply is steady outside of California; Coachella is about two weeks out. Lighter supply out of the East due to ongoing rain and quality issues. We are seeing upward pressure on open market business.

Color Bell Pepper: Supply is tightening up this week as coastal California regions begin to wind down for the season, and we prepare for Transition to the desert. The Hothouse Pepper category has also turned the corner and firmed up. Next week will be the tightest.

Jicama: Good supply and good quality available.

Mini Sweet Pepper: Supply lighter this week and expected for the next several weeks. Quality is good.

Mixed Chili Pepper: Supplies are lighter this week on several varieties: Poblano, Thai Chili and Serrano. Mainland Mexico, Baja and local programs in California remain the primary growing areas as well as the East Coast. Red Fresnos seem to be the shortest, and we see much higher prices per pound than normal.

Tomatillo: Good supply and quality available this week.

Pickles: Lighter supply is available out of Tennessee/North Carolina, with limited supply out of Mexico. Quality is good.

Eggplant: **WATCHLIST** Central Valley volume is steady while local programs in the East (Tennessee, North Carolina and Michigan) were limited this week. Overall quality is good.

English Cucumbers: Steady supply and softer markets are putting downward pressure on the spot market this week out

of Mexico and Canada. Quality is good.

Slicer Cucumbers: Supplies crossing through Otay Mesa and McAllen are much improved with stable volume available. In the East, we are seeing good supply out of Tennessee and Michigan. Quality is good from all shipping points.

Green Beans, Round Type: New York and other local regions in the East seem to be in good production this week. In the West, Orange County and Baja supplies are limited. Quality is mixed by region. Pole beans, Kentucky Wonders and Half Runners are much higher.

French Beans: **WATCHLIST** Supplies of organic and conventional French beans from Guatemala, along with conventional French beans from Mexico, are tightening as lower broccoli volumes and increased fall demand drive stronger demand. Overall production remains below normal levels, and higher pricing is expected in the coming weeks.

Zucchini/Yellow Squash: **ESCALATED** Very tight supply and higher demand have pushed pricing higher this week on Green and Yellow Squash out of Michigan, Virginia and California. We expect to see volatility in these markets over the next 2-3 weeks minimum and should see some price relief as growers break early fall blocks and production increases. Quality is good.

MELONS

Watermelon: The market remains stable with most of the volume coming out of the Midwest. California is still producing some volume along with Mexico. Pricing is steady as suppliers get ready for one last holiday push. Quality throughout the growing regions has been good.

Cantaloupe: With the change in seasons approaching, growers are producing more 12s and 15s than before. 9s are still readily available. Quality is still strong with high color and high brix levels. We should be transitioning to the desert over the next 10 to 14 days.

Honeydew: Honeydews are quickly becoming an area of concern with late fields in California being hit harder by virus and harvest projections are off by 25-30%. Sizing is still mostly 5s with no jumbo fruit being packed. Smaller sizing is available if we are in second cuts but that is extremely limited. Flexibility of sizing may be required over the next 7-10 days. Mexican crossings through Nogales have started but remain mostly limited due to rains experienced over the past week in growing regions.

HERBS

WATCHLIST Basil production, quality, and supply remain good across both regions. On the East Coast, all herbs, including imported chervil, are readily available. On the West Coast, most herbs have steady supplies and fair quality, although chervil, lemon thyme, and marjoram remain limited due to heat.

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

MIXED VEGETABLES

Artichokes: EXTREME Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated. Supplies on the smaller sizes are tight, so larger sizes may need to be subbed in order to get covered.

Asparagus: EXTREME The asparagus market remains extremely active, with demand continuing to exceed available supply. New fields continue to open in Ica, Southern Peru. Although sizing is beginning to improve, overall volume remains limited. Mexican production is also extremely light and is expected to remain constrained for several more weeks. Initial reports indicate that fields in Mexico did not sustain significant damage from the hurricane, and supply is expected to continue increasing. However, pricing pressures will likely continue until production from Ica and Southern Baja ramp up fully. Overall sizing remains smaller across all sizes.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: EXTREME Quality is fair and supplies are extremely limited. Reports of browning and pin rot continue. With the heavy insect pressure, prorates should be expected. All broccoli is now at the extreme level.

Brocolini and Sweet Baby Broccoli: ESCALATED Quality is good, but supplies are now extremely limited. Growers are holding to strict averages when they can but prorates should be expected.

Brussels Sprouts: ESCALATED Quality is good and supplies have improved but remain limited.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Quality and supplies are good.

Cauliflower: ESCALATED Quality is okay. Supplies remain limited. Prorates should be expected from some growers. Insect pressure has increased drastically and is affecting yields.

Celery: Quality and supplies are good. Organic Celery is at the extreme level.

Corn, Sweet: We are seeing a split market with good supply available in the East while the West markets remain lighter than usual as we transition back to California, which is the primary shipping point for the West Coast. In the East, we continue to see steady numbers out of Georgia, North Carolina and upper Midwest. Local availability will start to decline as we see cooler weather move into the upper Midwest and Northeast this week. Quality is good out of all regions.

Fennel: Quality and supplies have improved.

Kale: Quality and supplies look good.

Leeks: 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: ESCALATED Quality looks good, but supplies are tightening up. Prorates should be expected. The market is rising and there is heavy insect pressure that is reducing harvestable yields.

Green Onions: EXTREME Quality is fair. We are seeing insect damage and small sizing. Supplies are extremely limited. Growers will be holding to strict averages when they can but prorates should be expected. MX has had monsoon-type weather and continues to see rain. Yields are being drastically affected. We expect Green Onions to remain limited until November.

Mushrooms: Promotional volume is available for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking some time to support increases in their operating costs over the past five years. We are also expecting to see domestic suppliers implement cost of living increases as the dust settles on the DOC rulings to compensate for increased growing costs, food safety, labor etc. Brought on by years of dumping practices out of Canada.

Napa Cabbage: ESCALATED Quality and supplies are good.

Parsley (Curly, Italian): Quality is good, but supplies are tightening up. Italian Parsley 6Oct is escalated.

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: Quality looks good, but supplies are light.

Spinach: ESCALATED Quality is good, but supplies are tightening up. October is expected to be a roller coaster for this item. Insect activity has increased and yields will be affected.

Spring Mix: ESCALATED Supplies are limited and quality is okay. We are starting to see some decreased shelf-life. All leafy greens are affected by disease pressure.

Snow Peas and Sugar Snaps: ESCALATED Supplies of Guatemalan snow peas and sugar snap peas remain extremely limited, resulting in a highly active market. Domestic availability is also constrained due to weather-related disruptions and ongoing field transitions. Tight supplies and elevated pricing are expected to continue for the next several weeks. Snow Peas are the extreme trigger.

POTATOES:

WATCHLIST Growers are shipping new crop potatoes, and some will start adding volume into storage in the upcoming weeks. With less acreage, issues with water and high nighttime temperatures, larger 40-70 count potatoes are limited and will remain that way throughout the season. Suppliers are still hoping that potatoes will size up over the next couple of weeks. Smaller 80-120 count potatoes have better availability. Current market pricing remains elevated and getting stronger on bigger potatoes.

SWEET POTATOES:

WATCHLIST Growers have started to harvest the new crop and will put them in storage to let the skin set before shipping. This will take 3-4 weeks before we start to see the new crop shipped out. Limited old crop supplies remain available nationwide, putting a premium on all sizes. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. Quality has been fair to poor as we finish up the old crop.

TOMATOES:

Q4 Updates: Quarter 4 is upon us, and we need to remember this can be the most challenging time of year for the tomato supply chain with local and seasonal production winding down for the season. We will begin transitioning to Florida in the coming weeks as well as Mainland Mexico for the winter months; with a forecasted Super El Niño season expected we want to be prepared for any vulnerability to weather related pressure on supply. We will continue to monitor the weather in all growing regions as well as receive updates from our grower partners and provide that information to you as soon as possible.

MEXICO

Round Tomatoes: ESCALATED Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.

Roma Tomatoes: ESCALATED Stable supply and quality available out of Jalisco and Baja. Demand is very good this week putting upward pressure on prices. The drive for this is high demand from the East and lower production numbers out of Baja.

Grape Medley, Grape and Cherry Tomatoes: EXTREME A combination of events between the east coast and west coast being shorter than expected, markets will be firm across the category out west with possibilities of supply interruptions. Quality on the product loading in the west is far better than the east on all varieties.

CALIFORNIA

Supply has been stable on Rounds; however, larger sizes seem to be limited and drawing a premium; Romas have been mostly stable as well. General call prices are up this week as demand from the East was higher due to the ongoing rain in Central Tennessee and surrounding areas. Quality has been mostly consistent across California; we should start to see volume start to decline daily as the season is expected to wrap up in approximately three weeks.

ONIONS:

The transition to the NW, Washington, Oregon, and Idaho is mostly done. Most California suppliers are finished for the summer season. Overall, the market is still struggling to keep up with demand, elevating open market pricing. NW suppliers are reporting less volume on colossal and super colossal sizing due to extended periods of smoke from neighboring wildfires and heat.

EAST COAST

Round Tomatoes: ESCALATED Volume is mixed this week and still short on larger sized fruit out of Tennessee and North Carolina, mostly due to rain delays and quality. Quality is mixed out of all regions. Georgia should start scratching in approximately 10 days with Florida still 3 weeks out.

Roma Tomatoes: ESCALATED Supply will be lighter this week as production starts to decline on late summer plantings; South Georgia is expected to start in the next two weeks. Quality is fair at best due to weather-related pressure.

Snacking, Grape Medley, Grape and Cherry Tomatoes: EXTREME Very light volume this week on Cherries, Grapes and Medley due to weather-related pressure, summer crops ending early along the eastern seaboard and South Georgia starting late. We may actually see some supply interruptions in the east specifically on the entire category. Quality is fair at best. We expect volatility for the next two to three weeks.

OTHER FRUIT:

Apples: New crop Gala apples are being harvested, and inventory is building up. Granny Smiths are limited as they finish up storage crop, new crop will start in 1 week. Red Delicious, Fuji and Gold Delicious all have very limited storage supplies left, and new crop will start in mid to late September. New crop Honeycrisp apples have started, and good volume is available.

Pears: D'Anjou availability is limited; volume from both domestic and imports have dried up. The market remains stable, with new crop Bartletts. Red D'Anjou Pears are moderately available in U.S. #1 35–55ct sizes and should remain in the market for another couple of weeks. Bosc Pears are currently gapping until their respective new crop harvests.

Persimmons: New crop FUYUs available out of California.

Pomegranate: Good supply available; New Crop out of California.

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

Cherries: None or very limited supply available. Quality is not the best and will not improve until offshore starts.

Stone Fruit: Peaches and Nectarines are winding down out of California and other local regions. Good supply is still available on late season plums.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

Kiwi Fruit: Supplies are fair out of Chile; California Kiwi Berries available.

Mangoes: Steady supply out of Mexico and Brazil. Varieties: Tommy's, Kents, Palmer and Keitts.

Quince: Limited supply available this week.

Figs: Black Mission and Brown Turkey available out of California.

DAIRY:

There is a growing consensus across the major exporters that dairy fat is still heavy and that protein is tight. NFDMSMP is weird. The balance table still shows adequate supplies, but they are tightening. Even if sellers have some extra product there is a belief that there is enough uncovered demand still in the market that no one is eager to lower their offers. EU cheese seems balanced, caught between weak fat and higher protein. U.S. spot cheese is cheap enough that it could find some support here. China and the U.S. announced they would be lowering tariffs in the future, but it probably won't mean much for U.S. dairy. Feed costs pulled back this week, but record high diesel prices are ticking off farmers.

PROTEIN:

Beef: This week, expect the market to remain firm as the industry continues to work through, logistical constraints (shortage of drivers), and historically tight fed cattle supplies. The immigration enforcement action seems to have settled down, and production has grown as worker attendance normalizes. Packers should be able to increase the harvest modestly from last week's level, but not enough to create meaningful relief in availability. Middle meats remain the strongest area of the complex, while grinds are slightly weaker and end cuts are expected to trade mostly steady. Cash cattle are called steady to slightly higher as packers compete for limited supplies. The bottom line is that beef availability remains the biggest challenge in the market, and until harvest levels improve, the path of least resistance for beef pricing remains sideways to higher.

SHELL EGGS:

National FOB shell egg weighted average prices are lower. The undertone remains mixed, generally steady. Demand into retail channels is moderate to at times fairly good with food service movement remaining light to at times moderate. Offerings are moderate on mostly moderate supplies. Market activity is moderate to slow. California weighted average delivered prices are not well tested. The undertone is steady to barely steady. Retail and food service movement is light to instance moderate. Offerings are moderate. Supplies are moderate to at times light. Market activity ranges slow to moderate.

Chicken: WWOs continue to have a least than steady rating. WOG sizes 3 and under bidding lower. Sizes 3.5 and up are sitting steady. Floor stocks are barely adequate. Bone-in breasts and front halves maintain a steady tone. B/s breasts and tenders are the same at a steady rating. Wings are quiet and about steady. Dark meat activity remains steady. Supplies and offerings are good. The market is steady.

Export market is moderate.

PROTEIN:

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 176-193 and 16-24 lb. toms at 178-193 cents FOB for current shipments.

The market on white meat and white trim is steady. Demand is light. Offerings of fresh white meat are light. Frozen white meat and white trim offerings remain light. Cooked and deli demand light. Grade A consumer sized breasts, institutional sized breasts are steady. Tom drums, full-cut, and V-type wings are steady to weak with the balance of bulk parts mostly steady. Demand light to instances moderate. Offerings light. The thigh meat market is steady to weak. Demand light. Offerings very light to light. Defatted gizzards, hearts and livers steady to barely steady. Demand and offerings light. Tails steady. Demand and offerings light. Tom necks steady with demand light.

Mechanically separated turkey (MST) market is 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 steady. Demand light. Offerings light to moderate.

Pork:

The pork complex remains a demand-driven market. Pork continues to offer a significant value advantage versus beef, but ample production and softer export interest are limiting upside potential. Loins and trim remain the strongest areas of the complex, bellies are called steady to higher on seasonal demand, while hams are expected to remain the weakest primal due to sluggish export movement. Overall, expect a mostly steady to mixed market this week, with tighter hog supplies and lighter weights providing support but demand remaining the key factor. Pork remains one of the most competitively priced proteins on the menu and should continue to benefit from trade-down demand as elevated beef prices persist.

