



Fresh Is Everything

Weekly Market Review November 14, 2025

Overview

South Georgia is assessing the impacts of a freeze they experienced earlier in the week and will most likely wrap up the season early. All commodities have been impacted, however it's too soon to tell what was a complete loss and what can be salvaged.

Having said that, we have transitioned to South Florida on several items including **Corn**, **Cucumber** and **Green Bell Pepper**. In the West, product continues to improve on all commodities crossing through Nogales; **Tomatoes** will start crossing in approximately four weeks; Romas will be first, followed by Rounds then Snacking Tomatoes while Bell Pepper will start in approximately three weeks in Nogales. With the freeze in South Georgia, they will be done on Tomatoes as well as Quincy. Production is now in full swing out of Ruskin and should start to ramp up in Immokalee. We will see firmer markets this week as the cold will slow production down a bit, but we expect to rebound over the next 10 days.

A strong winter storm will bring rain to Coachella this weekend, and could impact veg production and delay loading Bell Pepper this weekend. **Grape** season is starting to wind down out of California and slowly transition offshore. Import **Cantaloupes** have begun, and shippers are slowing move customers offshore limited volume in Yuma. **Pineapple** availability remains limited; shippers are asking that we continue to be flexible on Pineapple sizes.

Avocado supply remains stable with good demand driven by retail promotion and lower than average pricing. Mexico reported a 63.8 million pound harvest for week 45, with 53.9 million pounds shipped to the U.S. Jalisco currently accounts for 10.5% of Mexico's shipments to the U.S. Both the Main Crop (28.6% dry matter) and the Off-Bloom Crop (28.6% dry matter) are showcasing consistent sizing, peaking on 48s and 60s. Lenticel is still present but is typical for this time of the year due to rain.

Chile and Colombia seasons are underway with limited volume landing in the US. 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**. Rainfall is forecast to begin Thursday across California's berry-growing regions and is expected to continue through Monday of next week. Multiple consecutive days of precipitation will likely delay, reduce, or cancel harvests, leading to potential loading delays, prorates, and order cancellations during the affected period. Once the weather clears, growers will send crews into the fields to clean up and assess crop conditions. To minimize disruption, fruit from Central Mexico (CMEX) will be used to supplement supply, which may result in temporary adjustments to pack styles, labels, or loading locations. Overall volumes are expected to remain very limited over the next 7 to 14 days.

Transition is in full swing and there are still many issues with yields and quality. There is rain in the forecast in Salinas, Huron, Oxnard, Santa Maria and Yuma. This could cause further disruptions in the supply chain. Harvesting crews may struggle to get into the fields, adding to the already limited supplies. The limited supplies are driving the market, and some commodities are still escalating. There is still some insect pressure in Salinas but the insect pressure in Yuma is very light. Weather will most likely be the biggest factor as we move growing regions. **Sugar Snap Peas**, **Snow Peas**, **Boston/Butter**, **Red Leaf**, **Green Leaf**, **Broccolini**, **Cauliflower**, **Lettuce**, **Romaine** and **Romaine Hearts** markets are all extremely limited and the markets remain at the extreme level. You will likely still see shortages on these items, and they will be very severe at times.

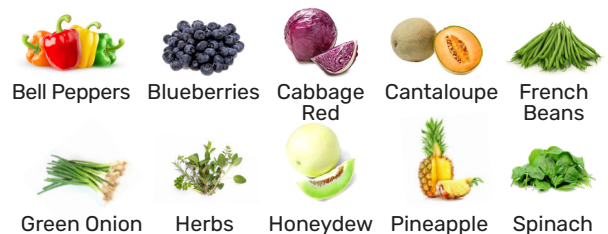
EXTREME



ESCALATED



WATCHLIST



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, this has become difficult, and the growers are just getting out what they can. **Brussels Sprouts** and **Celery** supplies are now also extremely tight. Growers are holding to very strict averages when they can, but you may see prorates as we approach the holiday season. Both commodities are likely to continue to escalate. The market is at the extreme level and that is driven by low yields. We can expect the light supplies to continue through November with the holiday pulls coming into play. **Fennel/Anise** are still escalated. Supplies are still a bit light but are improving. Artichokes also remain escalated. Sizing is still small, and growers are holding to strict averages. **Broccoli**, **Bok Choy**, **Spring Mix**, **Arugula** and **Cabbage** all remain escalated. Growers are seeing increased demand and decreased supplies. Cabbage supplies also remain very light. Growers are holding to averages when they can, but you should still see shortages as it seems as if rain will be a factor in the coming weeks. As the growers do their best to navigate transition, we will continue to see significant quality and supply issues. Mother Nature is in control and disruptions in supply should be expected. We will keep an eye on the weather and continue to send out updates and information as we receive it.

Our 2025–2026 **Citrus** program has officially begun! There is rain predicted for this week in the Central Valley, so citrus harvests will be stalled/paused for approximately 6–7 days due to this (about 4 days of rain predicted, plus the time needed for the fruit/fields to dry). Please keep in close contact with your supplier on their harvesting and supplies. This will lead to tight availability until they can get back out into the fields. Some suppliers are reporting Navels' size structure is peaking on medium sizes (72s/88s), followed by 56s and 113s, while others are seeing 88/113/138 peaks. Larger fruit is anticipated to be tighter in the coming weeks. Some field projections show small fruit tightening up after the new year. The quality and flavor profile of the fruit is still looking great overall.

CA Pink **Grapefruit** is projected to finish up, with fancy grade requiring ample lead time while choice is readily available. Texas/Desert Rio Grapefruit has begun slowly and will continue to ramp up as we head into December.

FRUITS & VEGETABLES

Avocados: A 59.9-million-pound harvest was reported for week 44, with 54.7 million pounds shipped to the U.S. Jalisco currently accounts for 6.8% of Mexico's shipments to the U.S. Both the Main Crop (28% dry matter) and the Off-Bloom Crop (28.3% 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 are 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 70.2% 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.

BERRIES

Strawberries: ESCALATED This week's weather forecast poses new challenges for California's key growing regions, with rainfall expected to begin Thursday and continue through Monday across Oxnard and Santa Maria. Growers are working to harvest ahead of the storms to minimize potential losses. Fruit quality out of Oxnard remains strong, with berries showing full color and consistent shape and size, averaging in the mid- to upper-20s per 1-pound clamshell. However, rainfall is likely to result in lighter coloration and more white shoulders, along with greater variance in overall berry size and shape. In Central Mexico (CMEX), production continues to build each week but not rapidly enough to offset the seasonal decline in California or satisfy current market demand. Despite the gradual increase, fruit quality has been excellent early in the season, with clean packs and only isolated reports of smaller sizing.

Supplies are beginning to improve on small **Lemons** (165 and up). Lemon Harvest has begun in Districts 1 and 3. Size structure is ideal from both districts 140s/115s/95s/165s or 140s/165s/115s/95s, respectively, allowing for availability across the board.

Fruit is heavy to fancy, California **Mandarins** are anticipated to begin now with a slow start, and they are projected to continue to ramp up, with California Cara Caras and Bloods ramping up in December. This weather could potentially push back Cara Cara's, so please be prepared for that. 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 The Pineapple market has started to settle down some but remains tight. Demand remains high, keeping pricing stable. Our contracts continue to maintain their integrity; however, we will need to remain flexible regarding sizes to ensure the stability of the supply chain. Overall, the quality and taste are good.

Raspberries: Production continues across Central Mexico (CMEX) and Baja, with overall availability showing steady improvement. Quality remains good, though recent heat, rainfall, and elevated humidity in the growing regions have led to some occurrences of soft or overripe fruit. Growers are monitoring field conditions closely and adjusting harvest schedules to maintain pack consistency and minimize weather-related impacts.

Blueberries: WATCHLIST Production remains active in Central Mexico (CMEX), with steady supplies and good overall availability. Fruit quality and sizing have been very good, reflecting stable growing conditions and consistent harvests across key producing regions.

Blackberries: ESCALATED Production remains active in Central Mexico (CMEX) and Baja, with good overall availability. Quality continues to be strong; however, recent periods of heat, rain, and humidity have resulted in some occurrences of soft fruit and minor red cell or color reversion. Growers are monitoring conditions closely to manage quality and maintain consistent pack standards as regional weather patterns stabilize.

CITRUS

Lemons: Lemons are finally opening up on small sizes and there is good availability. With harvesting currently in both D3 and D1, there is availability across the board.

Limes: Supply is steady for all sizes; quality will be mixed over the next few weeks.

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.

Imports/Specialties: Blood oranges and Cara Cara's are anticipated to begin in mid-December. The rain may push back Cara Cara's, so please be aware of this. When bloods begin in December, please be aware that the typical "blush" exterior may not be present, though internally you will find it! By mid-January, you will begin to see more of the typical exterior "blush" color on bloods.

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

We are expecting a strong cold front to impact the southeast early next week with freezing overnight temp Tuesday and Wednesday. This event could impact vegetable out of South Georgia and parts of Florida. We will assess this forecast and keep you informed of any concerns.

Green Bell Pepper: WATCHLIST Steady supply available from Coachella and South Florida. Georgia will be wrapping up early due to the freeze. We are expecting to scratch on greens out of Sonora in 3 weeks. Quality is good.

Color Bell Pepper: WATCHLIST Steady supply out of Coachella and Crossing through Mexico on blocky varieties. We expect to see shortages in the east until Florida starts field grown reds. 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: Steady supply available this week crossing through Nogales and Canada. Quality is good.

Slicer Cucumbers: Supply crossing through Otay, Nogales and McAllen may be lighter this week due to harvest delays caused by this week's weather in Baja and Sonora. Domestic supply will quickly transition to South Florida as Georgia lost most of its crop due to weather. Quality is good out of all growing regions this week.

Pickles: Supply ramping up out of Florida and Mexico. Quality is good.

Green Beans: Supply steady going into the holiday out of Florida and crossing through Nogales.

French Beans: WATCHLIST The supply of Guatemalan snow peas and sugar snap peas remains extremely limited due to ongoing adverse weather conditions. No meaningful improvement is expected for 5-7 days. Peruvian volumes are also low, given seasonal production declines. Meanwhile, Mexican growers are providing fair availability on French beans, offering some stability amid broader shortfalls in the specialty legume category.

Zucchini/Yellow Squash: Supply and markets will be mixed this week due to the cold weather in the east will most likely interrupt availability during the holiday pull as Georgia will wrap up for the season. Good news is we will still see steady crossing through Nogales and McAllen. With Georgia wrapping up the demand will quickly transition to South Florida for the winter.

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

MELONS

The Yuma season is coming to an end as offshore cantaloupes hit the US this week. Quality has been good. Imported honeydews are another week away, but Mexican honeydews are available.

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 import cantaloupes are still heavy on the 9s, but some 12s are getting packed. Quality looks good with firm fruit and brix ranging from 11-14%. Some suppliers will start moving customers to load offshore fruit in different ports as the product becomes available.

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 production on smaller sizing remains the same this week from Hermosillo. Larger sizes are still limited. Peruvian volume and sizing continue to improve. Markets are less active, with more standard-sized grass from Mexico. Peruvian arrivals continue to be delayed.

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

Broccoli/Broccoli Crowns: **ESCALATED** Quality is okay, and supplies are still limited. Growers are starting to move to Yuma so things should improve in a few weeks. We have still had reports of Browning, Pin Rot and Larvae from the insects. Some growers are still prorating. MX Broccoli has gotten better, and they are seeing good yields. The Salinas weather and the fact that growers are harvesting the last of the Salinas fields is affecting yields and quality. Organic Broccoli is still at the Extreme Trigger. Yields will continue to be challenging as we go through transition.

Broccolini 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. Yields will continue to be challenging as we go through transition.

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.

Honeydew: **WATCHLIST** Honeydew can be sourced from both domestic suppliers, and importers from Mexico. Sizing is heavy on the 5 and 6ct. Mexican product through Nogales have increased, relieving 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.

Cauliflower: **EXTREME** Quality is fair, and supplies are tight. Growers are battling insect pressure in Salinas, and they are holding to averages. The market is still at the extreme level. The weather continues to affect harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go through transition.

Celery: **ESCALATED** Quality is good, but supplies are extremely tight. The market prices continue to trend upward. Demand has risen due to the holidays approaching and with football season in full swing.

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: Supplies are limited, and quality is okay.

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

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: Supplies are still tight, but they are improving. Quality is good. Some growers are still holding to averages. The weather is still affecting harvesting and quality. This could cause supply issues. Yields will continue to be challenging as we go through 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 still limited but things are improving as we get into Yuma. Quality is also improving. We have still seen some reports of weak texture, discoloration and wilting.

Spring Mix: ESCALATED Supplies on Spring mix are improving as we move into Salinas. The hail has really affected quality. The market is still escalated but is trending down. Yields will still be challenging as we go through transition, but things are looking better.

Snow Peas and Sugar Snaps: EXTREME Supplies of Guatemalan snow peas and sugar snaps remain extremely limited as adverse weather continues to impact production, with little improvement expected until the end of November. Peruvian volumes are low due to normal seasonal declines, and domestic supplies also remain limited. Pricing continues to be elevated as demand far exceeds available supply. Mexican production has recently begun, but volumes remain insufficient to meet market needs. Yields will continue to be challenging as we go through transition.

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. 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. Markets were firmer this week, however, they are expected to retreat as production increases over the next ten days. Peeking on larger sized fruit this week. Quality is good.

Roma Tomatoes: ESCALATED Light supply combined with higher demand for the holiday pull have put upward pressure on fob prices. The cold weather not only knocked out Quincy and Georgia but also slowed production down out of Ruskin for another week to ten days. Overall quality is mixed and should improve as volume increases out of Florida.

Snacking Tomatoes (Cherry, Grape and Medley): Supply got tight this week due to the cold weather. We do not expect to see any improvement until after Thanksgiving. Quality will be mixed.

MEXICO

Round Tomatoes: Volume is steady crossing through McAllen and Otay. Quality is good.

Roma Tomatoes: ESCALATED Light supply this week crossing through McAllen and Baja due to cooler weather. This combined with higher demand for the holiday pull have put upward pressure on fob prices. The cold weather slowed production down and will most likely be late next week. Overall quality is good.

Snacking Tomatoes:

Grape: Lighter supply and higher demand from the east have put upward 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 until the new crop returns in August.

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

Red D'Anjou pears are moderately available in US #1 35-55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August.

Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Steady supply available out of California.

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

Cherries: 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:

EU milk production for September remained very strong and the weekly collections into October show the growth has continued. The government shutdown has delayed U.S. data, but we are now scheduled to get the Sep. milk production data on Monday. I'm concerned about possible data quality issues so we should be cautious about interpreting any big surprises. I expect head-line production will be reported up 3.2%. Week to week price movements have varied across the major exporters depending on the product in recent weeks, but the general story is still in-tact, milk production growth is far outpacing demand growth and we should generally expect continued downward pressure until production growth slows with whey being the exception.

BEEF:

Beef packers remain in the crosshairs of the administration, which continues to cite industry concentration as a key factor behind historically high retail beef prices. The "Big Four" packers, who collectively control roughly 85% of total harvest capacity, are being positioned as primary drivers of pricing power in the beef complex.

Cattle futures were highly volatile last week as markets reacted to headlines surrounding high beef prices and potential government measures to curb them. Despite the noise, futures began the week with a limit-up move on Monday. Most expect continued choppy trade in the near term, though strength in the middle meats should help stabilize cutouts and lend an upward bias in the coming weeks.

SHELL EGGS:

National FOB shell egg weighted average prices are steady to higher for the heavier weight caged eggs. The undertone is higher. Retail demand is fairly good to very good. Loose egg demand is mostly moderate. Offerings are light to moderate. Supplies vary, ranging fully adequate to very light. Market activity is moderate to active. California weighted average delivered prices are higher. The undertone is steady to firm. Retail demand ranges light to at times fairly good. Food service demand is light to moderate. Distributive demand is as needed only. Offerings are light to instances moderate. Supplies are moderate. Market activity is moderate.

The end of the government shutdown will allow the USDA to resume reporting, restoring much-needed transparency and potentially reducing some of the recent market volatility. Cattle are called steady this week, as packers previously secured forward commitments when prices softened. Harvest is projected at 560,000 head for the week.

PORK:

Butts, loins, and trim are holding steady, while ribs, hams, and bellies continue to look for buyers, leaving near-term pricing on the softer side. With Thanksgiving approaching and the industry in peak pork production season, upside potential will likely remain limited over the next couple of weeks. Hog prices are steady to slightly lower this week, and pork availability remains good.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS - Prices are trending steady for WOGS and whole fryers. Supplies are mostly moderate for all sizes. Demand is seasonally light. Floor stocks sufficient. Market activity is slow to moderate. In the parts sector, prices are trending steady to firm for tenders; steady for b/s breasts, fronts and bone-in breasts; about steady for dark meat cuts and steady to weak for wings. Supplies of b/s breasts and tenders are light to moderate; moderate for fronts and bone-in breasts; dark meat items are at least moderate, and wings moderate to heavy with medium and jumbo size wings noted as slightly more available. Demand is light to moderate. Market activity is slow to moderate.

EXPORT MARKET HIGHLIGHTS - Export demand is light to moderate.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - The market on fresh turkeys is steady with a firm undertone. Frozen 8-16 lb. hens and frozen 16-24 lb. toms steady to instances firm undertone. Frozen Grade A 8-16 lb. hens demand light to moderate and 16-24 lb. toms demand light. Frozen offerings short to light at best. Frozen commodity Grade A 2025 production 8-16 lb. hens offered at 168-183 and 16-24 lb. toms at 168-183 cents FOB for current shipments. Trading slow on frozen basted equivalent 8-16 lb. hens 177 FOB and 16-24 lb. toms 177/178 cents FOB for current shipments.

The market on fresh tom breast meat is unsettled with mixed opinions noted concerning its strength. The balance of white meat and white trims is steady to instances firm with frozen strongest. Demand on fresh tom breast meat mixed, mostly moderate. The fresh destrapped tenderloin demand is moderate, balance of white meat and white trims moderate to instances good. Offerings of fresh tom breast meat mixed with some held with more confidence than others, fresh destrapped tenderloins light at best with the balance of white meat and white trim offerings very light to light. Cooked and deli demand mostly moderate.

Grade A consumer sized breasts and institutional sized breast markets are steady with a firm undertone. Demand light to moderate. Offerings short to light. The tom neck market is steady, balance of tom and hen bulk parts markets steady to firm with tom 2-joint wings strongest. Demand light to good, mostly light to moderate. Tom neck offerings light, balance of hen and tom parts short to light. The thigh meat market is steady to firm with frozen strongest. Demand moderate to instances good. Offerings very light to light. Hearts, defatted gizzards and livers steady. Demand light to moderate. Offerings light at best. Frozen mechanically separated turkey (MST) market is steady, fresh steady with a weak undertone. Demand light to moderate. Offerings of fresh MST mixed ranging light to moderately heavy mostly moderate, frozen light. Trading slow.

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



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