

## Overview

South Georgia is mostly done for the season, and several items have completely transitioned to South Florida. There are some items, such as **Bell Pepper**, still being harvested in Georgia but that should wrap up soon. The tightest items going into the Thanksgiving Holiday are **Green Beans** and **Roma Tomatoes**. There is good supply available on **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. Tomato production is now in full swing out of Ruskin and should start to ramp up in Immokalee.

**Grape** season is starting to wind down out of California and slowly transition offshore. Import **Cantaloupes** from Guatemala has begun. Initial quality and brix levels are good, although sizing is on the small end. **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 70.4-million-pound harvest for week 46, with 61.6 million pounds shipped to the U.S. Jalisco currently accounts for 9.5% 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 showing consistent sizing, peaking on 48s and 60s. Lenticel is still present and 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, Guatemalan weather conditions have improved, although shipping arrival schedules have once again become unpredictable due to continued weather issues in the Caribbean Sea and port congestion. We will continue to see vessel delays.

California **berry** growing regions experienced significant rainfall last week and again early this week, with additional rain expected on Thursday and a slight chance on Friday. Growers are salvaging what they can, although packed fruit will be wet, and quality issues such as undercolor, under ripe fruit, shoulder and tip damage, and reduced shelf life are expected. Crews will need to strip plants once the rain ends, and early signs of water damage on green fruit indicate that volumes will remain limited for several weeks. To help support West Coast programs, growers will shift limited volumes from Mexico into California for consolidation. The forecast has rain, rain and more rain.

Yuma has been impacted by rain early in the season resulting in 5x their annual rainfall over the course of a 4-week period shortly after plantings were put in the ground. Quality and weights are likely to remain a challenge for most of the industry for potentially the next 3-4 weeks. We have also heard that several processors started to harvest in Yuma early to keep production running at the plant resulting in reaching into plantings early which were not at full maturity, this means harvesting extra acres to meet their needs - this can lead to a potential gap in supply. Harvesting crews are also struggling to get into the fields, adding to the already limited supplies. Light supplies and loading delays should be expected. Weather will most likely be the biggest factor as we settle into Yuma. **Brussels Sprouts**, **Sugar Snap Peas**, **Snow Peas**, **Boston/Butter**, **Red Leaf**, **Green Leaf**, **Broccolini**, **Cauliflower**, **Lettuce**, **Romaine** and **Romaine Hearts** markets all remain at the extreme level. You will likely still see shortages on some of these items. Brussels Sprouts and Celery supplies remain extremely tight. Growers are holding to very strict averages when they can, but you will 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.

### EXTREME



### ESCALATED



### WATCHLIST



**Artichokes** also remain escalated. Sizing is still small, and growers are holding to strict averages. **Anise/Fennel**, **Broccoli**, **Bok Choy**, **Spring Mix**, **Arugula** and **Cabbage** all remain escalated. Growers are seeing increased demand and decreased supplies. Growers are holding to averages when they can, but you could still see shortages as it seems as if rain will remain a factor in the coming weeks. Growers are doing their best to get out the best products that they can, but we will continue to see significant quality and supply issues. Mother Nature is in control and quality issues and disruptions in the supply chain 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! The rain in the Central Valley has resulted in stalled harvests for approximately 6–7 days (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. For Navels, larger sizes are becoming more readily available. Some field projections show small fruit tightening up after the new year.

Texas/Desert Rio **Grapefruit** will continue to ramp up as we head into December. 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. Please keep in mind that the rain will cause delays. Please give ample lead time for loading.

## FRUITS & VEGETABLES

**Avocados:** A 70.4-million-pound harvest was reported for week 46, with 61.6 million pounds shipped to the U.S. Jalisco currently accounts for 9.5% 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 showing 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.

**Bananas:** Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, the banana quality has been very good. We will see the removal of tariffs on these items over the next two weeks as we deplete inventory on hand and begin receiving product at the ports that will no longer have tariffs imposed on them. We will provide updates very soon on these rollout timelines.

## BERRIES

**Strawberries: EXTREME** California berry-growing regions saw significant rainfall last week and at the beginning of this week. Rainfall is expected on Thursday, and there is a slight chance on Friday. Growers are attempting to salvage what fruit they can, although the packed product will be wet, including clamshells and cardboard. There will be higher instances of undercolor and under ripe fruit as crews work through compromised fields, and water damage is expected to increase in any fruit packed during this period. Damage will be most visible on the shoulders and tips. Quality, color, flavor, and shelf life will be impacted. After the rains, growers will send in crews to strip plants. There are reports that green fruit is showing signs of water damage, which will likely lead to continued limited volumes. Volumes are expected to remain short for the next several weeks as growers work through issues in California. Growers will transfer limited volumes from Mexico to California to assist with West Coast consolidation. In Central Mexico (CMEX), production continues to increase each week, but not rapidly enough to offset the seasonal decline in California or meet 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. Overall relief is not expected for another 3–4 weeks.

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.

The California Garlic crop reports that supplies are good.

**Table Grapes:** Fall production is essentially done out of California due to recent weather events and we are now solely dependent on storage fruit. Demand has been stronger going into the Thanksgiving Holiday pull at retail and prices were higher this week. Quality will be mixed through the remainder of the season, high shatter, waterberry and depleted shelf life expect as the fruit ages. Very limited supply is available on greens while reds and blacks are still readily available. Autumn Kings, Autumn Crisp, Autumn Royals, Scarlets, Globes. Limited availability on Thompsons, Sweeties and Sweet Globes.

**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 okay, but supplies are still tight. Some growers are prorating. At times the prorates are extreme. 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 be challenging as we go into the holiday season.

**Iceberg VA:** **EXTREME** Quality is okay and supplies are okay. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Romaine VA:** **EXTREME** Quality is okay, and supplies are still limited. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**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 okay, and supplies are still tight. The market is now trending down. There have been reports of bruising, mechanical damage, lightweights, fringe burns and light cupping. For the hearts, we are seeing very little heart material. Some growers are prorating. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we get into the holiday season.

**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. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**Green Leaf, Better Burger and Red Leaf:** **EXTREME** Quality is fair, and supplies are extremely tight. 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. Yields will continue to be challenging as we go into the holiday season.

## EASTERN AND WESTERN VEGETABLES

**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:** **WATCHLIST** 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:** **ESCALATED** High Demand for Thanksgiving and light supply have driven prices higher this week. The freeze that impacted the southeast last week has impacted overall volume and will be an issue through Thanksgiving. We do expect some improvement over the coming weeks as newer blocks come available. Supply is steady crossing through Nogales and McAllen. Overall, quality is good.

**French Beans:** **WATCHLIST** Production is good, and quality continues to improve out of Guatemala. Mexico also has a fair supply of French beans available.

**Zucchini/Yellow Squash:** **WATCHLIST** 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

Imports from Guatemala have started hitting Florida. The 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** We are starting to see the sizing profile shift to the 12/15 on the import. Overall, the fruit is strong, with solid netting, good internal quality and brix levels ranging from 14-18%. Shippers are anticipating overall production to improve with the addition of more growing areas and a better size profile.

**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. Guatemalan honeydews have been slow to start due some cooler temperatures.



## 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** Production out of Mexico has improved across all sizes this week. Volume from Peru continues to strengthen in the northern region of Trujillo. The southern region of Ica will begin closing fields soon due to seasonality, which will shift the size profile toward more small and standard product. Markets have become less active as additional standard size product becomes available from both Mexico and Peru.

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

**Broccoli Florets/Broccoli Crowns: ESCALATED** Quality is okay, but supplies are still very limited. Growers have moved to Yuma, but the rain has limited yields. We have still had reports of Browning, Pin Rot and Larvae from the insects. Some growers are still prorating. Organic Broccoli is still at the Extreme Trigger. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

**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 into the holiday season.

**Brussels Sprouts: EXTREME** Supplies are extremely limited. Growers are struggling with yields. Insect pressure and internal browning continue to be reported, and quality just looks okay. The market is still at the extreme trigger. Growers are holding to 10-week averages when they can but prorates should be expected. Mid December is when we will see MX sprouts come into play so you should expect quality and supply issues through the end of the year.

**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 in 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. Rainfall has affected harvesting for some growers. Cello and Jumbo Carrots are the most heavily affected, and there will be limited availability until weather conditions improve.

**Cauliflower: EXTREME** Quality is fair, and supplies are tight. 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 into the holiday season.

**Celery: EXTREME** Quality is good, but supplies are extremely tight. The market prices continue to trend upward. Demand has risen due to the holidays and football season. The weather has affected harvesting and quality. This is causing additional supply issues. Yields will continue to be challenging as we go into the holiday season.

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

**Ginger:** Supplies and market are steady.

**Green Cabbage:** Supplies 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 into the holiday season.

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

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

**Napa Cabbage: ESCALATED** Quality and supplies look good.

**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 settle into Yuma. The market is still escalated but is trending down.

**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 continue to be challenging, and most growers are only covering 50% of averages.

## 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 is plentiful on new crop rounds out of Ruskin and Palmetto, and seeing deals made across all sizes with lackluster demand going into the Thanksgiving Pull. Quality is outstanding.

**Roma Tomatoes:** **ESCALATED** Light supply combined with higher demand for the holiday pull have put upward pressure on fob prices. We expect volume to increase over the next week. Overall quality is good out of Florida.

**Snacking Tomatoes** **ESCALATED (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.

## 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 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:** **ESCALATED** 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.

**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:**

It's getting repetitive to write every week but we're just dealing with an overwhelming amount of milk. Long-run demand growth is in the 1-2% range while U.S. and EU production is running 4-6% and NZ is running 3%+. On a week-to-week basis we can get some strength in the market, but the general trend is still down and I don't think we've put the lows in for cheese, butter or SMP/ NFDM and WMP yet. Whey products are the only thing that seems to have some strength. It seems like WPC80/WPI prices can continue to hold at high levels at least through Q1 but dry whey prices are getting high enough that they will likely kill off some demand in coming months and could pull back a bit.

## **BEEF:**

With the 43-day government shutdown now over, market watchers are reviewing long-delayed reports such as the WASDE and other supply and demand data that had been withheld. At the same time, the Administration is increasing its focus on lowering beef prices and plans to reduce tariffs on roughly 200 imported food items. As of this writing, Brazil still faces its secondary 40% tariff, which will do little to ease hamburger prices.

Despite the headlines, the fundamentals of cattle supply remain unchanged. A historically low inventory combined with solid consumer demand continues to drive near-record cattle and retail beef prices. Supplies are expected to tighten even further in 2026 once heifer retention begins in earnest, and the calves from those retained heifers will not contribute to increased beef production until 2028-2029. As we all know, there are no quick fixes to the current situation. The old adage, "the cure for high prices is high prices," may eventually play out, but it will take time.

## **PORK:**

Hogs are trading lower this week but remain roughly 5% above the five-year average. It's safe to say there is plenty of pork available, and that is showing up in the tone of the market. Bone-in loins are seeing discounting, and the same is true for bone-in hams, as export interest remains sluggish. With production running higher, trim prices are drifting lower as well. Spare-ribs continue to attract good interest, presumably from freezer programs. Butts and picnics are steady but are expected to move higher on December holiday demand, with the bulk of that strength likely showing up toward the end of the first week of December.

## **SHELL EGGS:**

National FOB shell egg weighted average prices are steady to instances higher. The undertone is steady to mostly higher. Retail demand is moderate to good, usually fairly good to good. Loose egg movement is moderate. Offerings are light to moderate. Supplies range fully adequate to light. Market activity is moderate to active. California weighted average delivered prices are about steady to higher, although lightly tested. The undertone is steady to firm. Retail demand ranges light to good. Institutional movement is light to moderate. Offerings are light. Supplies are generally moderate. Market activity is moderate to slow.

For this week, cattle futures and live prices are thought to be near a bottom. Holiday rib demand will support the cutout over the next few weeks, and the upcoming short harvest week should provide additional pricing support. Beef packer margins are currently break even to about negative \$10 per head. Through Tuesday night's close, the Choice and Select cutouts are essentially treading water with only minor day-to-day changes. Packers appear to have product around them that they want to place ahead of Thanksgiving. Briskets are moving higher on holiday demand, outsides are steady to lower, and middles remain mostly steady. Grinds are steady but are expected to appreciate into early December due to reduced production during Thanksgiving week.

## **CHICKEN:**

**DOMESTIC MARKET HIGHLIGHTS** - Prices are trending steady to firm for WOGS; steady for whole fryers. Supplies are moderate for all sizes. Demand is seasonally light. Floor stocks sufficient. Market activity is moderate. In the parts sector, prices are trending at least steady for b/s breasts and tenders; steady for fronts, bone-in breasts and dark meat cuts; wings are about steady. Supplies of tenders and b/s breasts are balance and moving well; moderate for dark meat cuts, fronts and bone-in breasts. Wings are moderate to heavy for current needs. 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. Frozen 8-16 lb. hens and 16-24 lb. toms steady for pre Thanksgiving and steady to weak for post-Thanksgiving needs. Demand light with buyers rapidly running out of time for Thanksgiving needs and taking a wait and see position for the December holidays. Frozen offerings light at best for pre-Thanksgiving needs. Frozen commodity Grade A 2025 production 8-16 lb. hens offered at 157-177 and 16-24 lb. toms at 150-181 cents FOB for current shipments. Trading slow on frozen Grade A basted equivalent 2025 production 16-24 lb. toms 166174 cents FOB for current deliveries.

The market on fresh tom breast meat is generally steady with higher trending offering prices noted. The balance of white meat and white trims are steady to firm. Demand on fresh tom breast meat generally moderate. The fresh destrapped tenderloin demand and the balance of white meat and white trims moderate to instances good. Offerings of fresh tom breast meat light at best, fresh destrapped tenderloins and the balance of white meat and white trim offerings very light to light. Cooked and deli demand light to moderate.

Grade A consumer sized breast markets are generally steady while institutional sizes are steady to firm. Demand light to moderate. Offerings short to light. The tom neck market is steady, tom 2-joint wings and the balance of tom and hen bulk parts markets steady to firm. 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 with a firm undertone. Demand light to moderate. 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 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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