



Fresh Is Everything

# Weekly Market Review

## March 13, 2026

### Overview

**Cucumber** and **Squash** from Mexico are showing some supply relief, though Florida remains short on Cucumbers while Squash availability improves. Florida is experiencing significant shortages in **Tomatoes, Beans, Bell Peppers,** and **Corn.** **Hot Peppers** are also in very tight supply across all categories.

Adverse weather in Yuma continues to impact **lettuce** with widespread mildew and increased insect pressure, limiting harvestable acreage and shelf life. **Carrots, Celery,** and **Green Onions** face ongoing constraints due to storm damage and disease, with full recovery not expected until April. **Green Onions** and **Broccolini** are at extreme supply levels. **Broccoli, Celery,** and **Cauliflower** show improved supplies this week, but growers anticipate intermittent gaps and early Yuma season completion, potentially leading to market instability due to prevalent insect pressure.

Recent frost events in Guatemala have impacted **French Beans, Sugar Snap Peas, Snow Peas,** and **Baby Peeled Carrots,** further tightening already limited supplies. Cold weather and frost in Guatemala, combined with port congestion in Guatemala and Honduras, are contributing to these issues.

**Table Grape** supply is steady, with Red Grapes readily available and Green Grapes tighter. **Lime** availability will decrease due to reduced volume from Veracruz, Mexico, leading to higher markets and less availability across all sizes. Efforts are underway to secure alternative supplies from Colombia. **Banana** supplies are expected to tighten due to strong global demand and virus related issues. **Cantaloupe** volume has increased and should remain strong, but **Honeydew** supplies are declining due to Downy Mildew in Guatemala and Honduras. **Pineapple** availability has slightly improved, with a request for size flexibility.

**Avocado** supplies are growing, with plentiful large and jumbo sizes from Mexico and California, while small sizes remain tight.

**Strawberry** volumes are increasing from California and Baja Mexico, as production winds down seasonally in Central Mexico and Florida. **Blueberry** and **Raspberry** volumes are very low, with prorates likely in the coming weeks, especially Raspberries.

**Citrus** supplies are strong, favoring larger fruit sizes. California and Oxnard **lemons** are available, focusing on fancy/140+ counts, with limited smaller sizes. Navels and Cara-Caras are peaking on 72/88 counts, with tighter availability expected for 113/138 counts. Mandarin availability varies, with ample larger sizes of Bloods and Minneolas, but scarce smaller Minneolas. California Rio Red grapefruit is available, and Texas Grapefruit supplies are expected through April. It is recommended to size up where possible and maintain close supplier communication.

Ongoing unrest in several Mexican states is disrupting agricultural regions, impacting field operations, labor, packing, and transportation, leading to expected volume reductions over the next 3-5 weeks.

EXTREME					
	Blueberries	Broccolini	Carrots, Baby	Green Beans	
	Limes	Green Onion	Raspberries	Sweet Corn	
	Tomatoes Rounds & Romas from Mexico & Florida	Warm Florida Veg Beans, Corn, Cucumber, Eggplant, Bell Pepper, Soft Squash			
ESCALATED					
	Asparagus	Bok Choy	Broccoli Crowns	Cauliflower	Celery
	Cilantro	Fennel/Anise	French Beans	Honeydew	Hot Peppers All Varieties
Leeks	Lettuce	Napa	Parsley Italian	Romaine	
	Romaine Hearts	Snow & Sugar Snap Peas	Tomatillos		
WATCHLIST					
	Cabbage Green	Cabbage Red	Cantaloupe	Herbs	
	Green/Red Leaf	Pineapple	Small Citrus small citrus all varieties		

## FRUITS & VEGETABLES

**Avocados:** Mexico had an 89.5-million-pound harvest for week 10, with 75.7 million pounds shipped to the U.S. Sizing continues to peak toward 40s-60s counts, while dry matter has climbed to 33%. There is still plenty of availability and the occasional sight of Lenticel due to rain throughout the season. The California season has started slowly with 2.4 million pounds, although the dry matter is only around 24%.

**Bananas:** Banana supply will remain tight due to increased global demand and declining tropical production, exacerbated by 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. consistent ordering patterns, and staying proactive to address any potential issues that could impact the program.

## BERRIES

**Strawberries:** All California strawberry growing regions (Oxnard, Irvine, Santa Maria, Watsonville, and Salinas) are now in production. Favorable growing conditions have accelerated crop development, placing the season several months ahead of a typical schedule. Quality has been very good, with medium to large berries showing strong sheen, consistent color, and uniform shape. This is an ideal time to begin spring and summer promotions, as availability is expected to remain strong through the remainder of March and the Easter promotional period. Baja Mexico production remains steady with good overall quality. Florida production is steady, and good availability is expected over the next few weeks before the Florida season winds down. Central Mexico is in its final weeks of production for the U.S. markets.

**Blackberries:** Production continues in Central Mexico, though supplies have tightened in recent weeks as crops move past their seasonal peak, reducing overall availability. Volumes are expected to resume increasing by mid-March and stabilize as we move into April. The overall quality remains good.

**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.

**Table Grapes:** Quality is outstanding, and Brix are hitting the high teens. We seem to be in a good stride with stable availability on all three colors. Green varieties available: Sweet Globes. Red varieties: Red Globes, and Sweet Flavor. There are also generic varieties on all three colors available this week.

**Raspberries: EXTREME** Supply and availability will remain limited throughout March and most of April. Pro-rates and potential cancellations should be expected based on daily supply conditions, and substitutions may occur on labels, organics, and pack styles when necessary. Several factors are contributing to the tight market, including Central Mexico reaching its lowest production levels as volumes decline from peak levels and fields are pruned in preparation for the next crop cycle. Additionally, ongoing reports of political unrest, violence, blockades, and operational disruptions continue to affect key growing regions, although these issues are receiving less national attention than in previous weeks. Central Mexico volumes are expected to remain low for the next 3 to 5 weeks, with meaningful recovery not anticipated until late April or early May. Some additional volume from Baja is expected to begin supplementing supply in early to mid-April. Overall production remains limited, though quality has been generally good.

**Blueberries: EXTREME** Production remains active in Central Mexico, but supplies are very tight as crops move past seasonal peak volumes. Mexican quality and sizing continue to perform well; however, overall availability will remain limited over the next several weeks as both South American and Mexican volumes decline, and the early Florida crop is expected to be significantly reduced. Many Florida growers are reporting crop losses of approximately 80-85 percent due to earlier freeze events, with some reporting losses of 50 percent or less.

## CITRUS

**Limes: EXTREME** Supply is much lighter this week out of Mexico as cooler weather and rain in January has impacted the current growing regions. We are seeing issues such as the size profile be heavy to the smaller fruit; we do anticipate this to improve over the next 3 to 4 weeks. Quality is fair currently with some disease present affecting appearance and shelf life. Price and size vulnerability expected through March and may need to shift supply from Mexico to Colombia to fill orders in certain cases.

**Lemons:** (California & Oxnard)

- Availability: Strong across all sizes in both reporting houses.
- Grade & Size: Fruit is leaning towards a fancy grade, with peak availability on 140s and larger. Sizes 165/200 are slightly snug but overall supply is in good shape.

**Navels:** (Domestic)

- Availability & Sizing: The manifest is peaking on 72/88 counts.
- Tight Counts: There is a significant lack of 113/138 sizes, which is placing pressure on the 88s. Buyers should be prepared to receive 72s on many orders.
- Good Availability: Supplies are good for 72 count and larger.
- Origin: Domestic Navels are available from the Central Valley, with limited supply from Fillmore and Riverside.

**Bloods: Availability: Large sizes are readily available.**  
Promotional volume may exist where supply is strong.

**Mandarins: Availability:** This is an area of supplier variability. Some shippers are reporting limited availability, while others have a comfortable supply.

- Recommendation: Maintain close contact with your suppliers to ascertain their current inventory levels and supply status.

**Cara-Cara Navels:** Availability & Sizing: All sizes are available, peaking on 72/88 counts. Similar to Navels, there is a lack of 113/138 sizes, and the fruit is trending larger.

**Minneolas:** (Tangelos)

- Availability & Sizing: All sizes are available, with a primary focus on large fruit.
- Tight Counts: Small sizes are tight.

**California Rio Red Grapefruit:** Availability: California Rio Red Grapefruit is currently available.

**Texas Citrus Overview:** General Trends: Texas is offering Valencia Oranges and Grapefruit, with supplies expected to last through April.

- TX Valencia Oranges  
Availability: Available, with the manifest peaking on 72s.  
Duration: Expect Valencia supplies to continue through April.
- TX Grapefruit  
Availability: Shipping this week, peaking on 36/40 counts.  
Duration: Plan for Texas Grapefruit supplies through April.

## WEST COAST LETTUCE

**Iceberg: ESCALATED** Lettuce quality and supplies are just okay and weights will be light. The market is active and weather has affected both harvesting and quality. Growers expect yields to be low because of insect pressure, mildew damage and cap leaves. Quality will be hit or miss. Shortened shelf-life issues should be expected.

**Iceberg VA: ESCALATED** Quality and supplies are just okay. We have seen reports of short shelf life and mildew in bags.

**Romaine & Romaine Hearts: ESCALATED** Romaine and Romaine Heart quality and supplies are good. There have been reports of bruising, fringe burn, light weights and mildew on the outer leaves. Growers are holding to averages. Hearts are now at the extreme trigger. Supplies will continue to tighten up as we get closer to transition.

**Romaine VA: ESCALATED** Quality and supplies are okay. We have seen more core in the bags and some mildew.

**Boston/Butter Lettuce:** Quality and supplies are good. Mildew and fringe burn pressure have been observed.

**Green Leaf, Better Burger and Red Leaf: WATCHLIST**  
Quality and supplies are good for now. Mildew and fringe burn pressure persist, and carton weights remain light.

## EASTERN AND WESTERN VEGETABLES

**Green Bell Pepper: EXTREME** Very light supply out of Mexico this week and quality will be mixed due to a combination of weather and insect pressure while supply will be extremely short out of South Florida due to freeze losses. Markets are much higher this week and expected to be volatile through Mid-April.

**Color Bell Pepper: ESCALATED** Lighter volume expected to continue out of Mexico due to cooler weather and insect pressure impacting yields while Florida will see very short supply due to last month's freeze. Markets are expected to be volatile through April. The Hot House Pepper category may see some volume in the next cycle that may bring some relief to this market over the coming weeks.

**Mini Sweet Pepper:** Supply will be stable over the next few weeks. Quality remains good.

**Mixed Chili Pepper: ESCALATED** Supplies are good out of Sinaloa and Sonora. Markets will be shorter this week on several varieties: Jalapeno, Serrano, Caribe, Habanero, Fresnos, and Shishito Pepper.

**Tomatillo: ESCALATED** We are starting to see some improvement on supply this past week. Quality and availability will continue to improve over the next 7 days. Markets to remain firm as demand shifts from the east to Mexico after last month's freeze.

**Eggplant: EXTREME** Domestic supply is very light this week out of Florida due to the freeze while crossings through Nogales remain strong. Best quality is out of Mexico.

**Pickles:** Lighter crossings through Nogales and McAllen. Quality is good.

**English Cucumbers:** Lighter supply and moderate demand have pushed pricing higher this week out of Nogales and McAllen. Quality is good.

**Slicer Cucumbers: ESCALATED** Supply crossing through Nogales and McAllen improved this week as they break open new production. Quality is outstanding. Florida will be short due to last month's freeze and outside sourcing will be most likely for the Florida east coast markets out of Honduras and Dominican Republic. Market volatility is expected through April.

**Green Beans: EXTREME** Florida's supply continues to be severely impacted by last month's freeze, leading to extreme shortages and market volatility over the coming weeks. "Act of God" declarations are being issued as market prices continue to rise daily, and the quality of available produce is fair at best. Mexico is also experiencing lighter availability due to cooler weather slowing production. We expect market shortfalls and challenges through early April.

**French Beans: ESCALATED** Supplies from Guatemala remain extremely limited due to earlier cold weather and frost events. Mexican French bean availability is also tight, as cooler temperatures continue to impact yields.

**Zucchini/Yellow Squash: EXTREME** Supply improving on green but light on yellow over the next week with newer blocks coming on in Florida as well as Mexico. We should see better availability over the next week as well as much needed price relief.

## HERBS

**WATCHLIST** Basil production and quality remain inconsistent due to cold weather in Mexico, heavy rainfall in Colombia, and ongoing USDA holds and fumigations. Cooler conditions continue to contribute to variability, with occasional tip burn possible during the winter months. Imported chervil supply has improved. Overall, other herb supplies are steady with fair quality, with the exception of tarragon, which remains more limited. Arugula and Cilantro are extremely limited from some growers and prorates should be expected.

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

## MELONS **WATCHLIST**

**Watermelon:** The market on seedless melons have increased with less Mexican production. Cooler temperatures in Guatemala have seen watermelon production drop significantly and a shift in size from 45's to 36's. The freezing temperatures in Florida will likely play a role in early production set to start at the end of the month.

**Cantaloupe:** There is a good mix of 9/12s available, while 15s are starting to increase. Quality overall continues to be good. Brix levels mostly range from 12-14%.

**Honeydew: ESCALATED** Fields in Guatemala and Honduras are reporting Downy Mildew, a virus that attacks the leaf coverage of the plant and drastically reduces yield, melon size and brix level. Suppliers feel this will last at least a month. Larger fruit will remain tight during this time, and flexibility on sizing will be required.

## MIXED VEGETABLES

**Artichokes:** Quality and supplies are both good.

**Asparagus: ESCALATED** Mexican production has improved with more favorable weather conditions in the San Luis and Caborca regions. However, warmer temperatures are forecast across the growing areas, which may lead to increased tip feathering. Peruvian production is expected to begin in approximately three to four weeks. Markets have remained steady.

**Bok Choy: ESCALATED** Quality and supplies are okay.

**Broccoli Florets/Broccoli Crowns: ESCALATED** Quality is okay and supplies have tightened up. The rain and the warmer weather that Yuma experienced has led to quality issues that will remain for the next few weeks. Reports of browning and pin rot continue. Growers are holding to averages.

**Brocolini and Sweet Baby Broccoli: EXTREME** Quality is good, but supplies are limited with most growers. Weather has affected harvesting and quality. Growers are holding to averages.

**Brussels Sprouts:** Supplies and quality have improved. We are still combating insect pressure and internal browning but overall, quality is good. The market is no longer escalated and supplies should continue to improve as we shift growing regions.

**Carrots: (JUMBOS, MEDIUMS and CELLOS)** Due to continued rain events, supplies are tight on Baby Carrots, Cellos, and Jumbos, with limited availability. Rainbow Carrots remain steady with good quality and supply. Harvesting has been challenging because of muddy fields. Mexican carrot volumes are decreasing due to natural seasonality and local markets emerging from Canada. Rainfall has affected harvesting for all of the growers. Cellos and Jumbos are the most heavily impacted. Prorates should be expected. Availability will remain limited until conditions improve. There are Jumbos available in GA if you could load there. Growers request orders be sent in as early as possible. At least 7-10 days ahead of time.

**Cauliflower: ESCALATED** Quality is good, but supplies are tightening up. The market remains at the extreme level.

**Corn, Sweet: EXTREME** The west has reacted to the shortfalls out of Florida and is now seeing historically high prices across all markets. Florida has lost an estimated 80 percent of its current production cycle due to the freeze while Mexico production remains very light. Act of God Declarations on program business. We expect to see volatile markets through April. Quality will be fair at best and we are seeing attributes such as small ear and immature kernels amid this production shortfall as growers in Florida are basically salvaging what they can from their crops.

## ONIONS:

The onion market remains stable. With harvest concluded, all products will ship exclusively from storage in the Pacific Northwest. While modest increases may 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.

**Celery: ESCALATED** Quality is good, and supplies are still limited. Weather has affected harvesting and quality, prorates should be expected on VA and Carton Celery is still being held to strict averages. We will not see full relief until April.

**Fennel: ESCALATED** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

**Kale:** Supplies are limited, and quality is okay. Weather has affected harvesting and quality, causing additional supply issues.

**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: WATCHLIST** Supplies and quality are good, but the market is tightening up. We had added this to the watchlist as we expect supplies to tighten up as we get into March.

**Green Onions: EXTREME** Supplies are limited and quality is good. Weather has affected harvesting and quality, causing additional supply issues industry wide. Yields are expected to remain challenging as we close in on transition. Previous rain in the Mexican growing region continues to hamper supplies. Growers are holding to averages and the market is trending down.

**Mushrooms:** Supply is expected to be steady for the next several weeks. Quality is good.

**Napa Cabbage:** Quality is good, but supplies are tight. The market is increasing.

**Parsley (Curly, Italian):** Supplies and quality are 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:** Supplies remain limited. Reports of weak texture, discoloration, and wilting continue. We are also now seeing disease pressure and mildew which are further impacting yields.

**Spring Mix:** Supplies are limited this week. Weather has affected harvesting and quality, causing additional supply issues. We are also now seeing disease pressure and mildew which are further impacting yields.

**Snow Peas and Sugar Snaps: ESCALATED** Guatemalan snow pea supplies are good, and sugar snap availability continues to improve. Mexican snow pea and sugar snap supplies remain fair at best as growers work through ongoing field transitions.

## POTATOES:

Potato supply 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, while Norkotahs will continue to make up the majority of 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.

### **Tomato Quality**

We will continue to see pressure on the tomato supply chain over the coming weeks as we navigate these markets. Color will be a major concern with vine ripens out of Mexico; with the lighter volume and high demand, the frequency in inventory turns is much higher which does not allow that ripening process at shipping point forcing more handling post-harvest. We recommend several actions throughout the supply chain. Storing fruit in warmer areas like back of house is recommended. These processes will assist in color management throughout the supply chain during this current market condition.

## **TOMATOES: EAST COAST**

**Round and Roma Tomatoes: EXTREME** Florida will see its lightest production week of the season this coming week, and markets will remain volatile through early May. We do expect the need to sub sizes and varieties to navigate this unprecedented weather event and are receiving Act of God Declarations from our Florida partners.

**Grape Medley, Grape and Cherry Tomatoes:** Supply was very short this week, and pricing was higher on cherry tomatoes and medley tomatoes; grapes were somewhat stable as it felt like there were a few more grapes on the market this week.

**OTHER FRUIT: Apples:** The Washington apple market supplies are significantly tighter than expected coming into the season, and the total projected crop size has been reduced in recent months. The Washington State Assoc. apple crop projections just released show an additional decrease of 5 million boxes from the earlier season projections. That's a total reduction of approximately 8 million boxes since September. Spring and summer growing conditions produced a larger-than-normal size profile, which has made the 100-175 count sizes that foodservice relies on much tighter than the original projected. At the same time, favorable growing conditions led to higher-color fruit with fewer defects, resulting in a higher percentage of the crop grading into Premium and WAXF #1 for export programs or being committed into retail bag programs where pricing is significantly stronger. Pack-out percentages are down due to quality issues that did not fully present themselves during the growing season and only became evident once fruit moved into regular storage and packing. More fruit than expected has also been placed into controlled-atmosphere storage for late-season programs, and to ensure coverage through the entire 12-month season, since the reduced crop size projections. Some growers chose not to harvest marginal fruit due to rising labor and input costs, further reducing the availability of Fancy, USXF and WAXF #2 supplies during late season harvesting. Although this crop size is within a 5 year-avg range, the Red Delic, Gala, Fuji, Gold and Granny are all less than historical supplies as growers replace those trees with new, higher price varieties of Cosmic Crisp, Honeycrisp, Envy, Ambrosia, and organics.

## **TOMATOES: MEXICO**

**Round Tomatoes: ESCALATED** Volume is slowly improving, and demand from the east is higher offsetting the increase in volume. We will see stronger markets with very high FOB prices established over the next ten days. Quality remains very good through McAllen and Nogales.

**Roma Tomatoes: ESCALATED** There is a huge variance in quality and price this week; older production out of Sinaloa and new production out of Sonora and will be reflected in price. Markets will remain volatile due to the conditions in Florida pushing demand west.

**Grape Medley, Grape and Cherry Tomatoes:** Improving supply and lighter demand has put downward pressure on price this week. Quality is outstanding.

**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:** Limited Supply out of Israel.

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

**Cherries:** Lighter supply available out of Argentina and Chile.

**Stone Fruit:** Good supply on Peaches, Plums and Apricots currently out of Chile.

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

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

**Mangoes:** Good supply out of Mexico Peru and Puerto Rico. Varieties: Kents, Tommys, and Ataulfo.

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

## DAIRY:

The big point of discussion this week was the conflict (war?) in the Middle East. The very real and very big immediate issue for dairy is the closure of the Strait of Hormuz which cuts about 6% of demand off from the major dairy exporters. Major shipping lines are also rerouting traffic away from the Red Sea which will increase shipping time from Europe to Asia and raise shipping costs globally. Logistics are going to get messy for a while and some importers will likely build some just-in-case inventory which might mask some of the weaker Middle East demand, but the longer the straight stays closed to dairy flows, the bigger the bearish problem will become. It impacts EU and NZ more directly than the other major exporters.

## BEEF:

Many analysts expect 2026 to bring a modest uptick in heifer retention and some growth in the beef cow herd, but weather remains a key wild card. Conditions across much of the country have been very dry so far this year, which could influence producer decisions later in 2026 as pasture conditions and feed costs are evaluated. Higher energy prices present an additional risk to consumer demand as the Middle East conflict enters its second week. Farm diesel prices jumped 24%, or 76 cents per gallon, last week—an unwelcome development heading into the planting season crunch. Rising energy costs tend to flow through the system quickly as companies move to incorporate higher expenses, creating broader inflationary pressure in short order. This week beef packer margins are estimated to be negative \$50 per head which is much improved. That's good for the packers but bad for boxed beef pricing. Futures will be volatile and cattle are expected to trade steady to slightly lower. 515k is the expected harvest this week. There is not much downward price action on anything right now. Prompt lists are very short and everyone is bracing for the JBS strike situation to play out.

## CHICKEN:

**DOMESTIC MARKET HIGHLIGHTS** - Prices are trending steady for all sizes of WOGS and whole fryers. Supplies are moderate. Demand light to moderate. Floor stocks sufficient. Market activity is slow to moderate. In the parts sector, prices are trending firm for b/s breasts, fronts and bone-in breasts; steady to firm for tenders and dark meat cuts; weak for wings. Supplies of breast items and dark meat cuts are in close balance with legs, leg quarters, thighs and thigh meat well cleared; moderate for tenders; wings are available. Demand is moderate. Market activity is light to moderate.

**EXPORT MARKET HIGHLIGHTS** - Export demand is at least moderate.

## SHELL EGGS:

National FOB shell egg weighted average prices are steady to higher. The undertone is higher. Demand into retail channels is moderate to fairly good. Loose egg movement is light to instances moderate. Offerings are light to moderate and confidently held. Supplies are mixed, mostly moderate and vary by area. Market activity is moderate. California weighted average delivered prices are only lightly tested on Large. The undertone is firm to higher. Retail demand is light to at times moderate, while generally light for food service. Offerings are light to moderate. Supplies are moderate to light. Market activity is moderate to slow.

## PORK:

To start the week the cut is higher on strength in all of the primals. Hog are called steady to higher for the week while futures are trending slightly lower. Pork may see some additional retail interest as the beef complex is particularly volatile right now. Eastern demand for hams will support that market in the near term. Ribs, loins and butts are called sideways on the week. Hot dog season will support the trim markets in the weeks ahead and bellies have some upside potential from processors as retail bacon advertising picks up.

## 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 164-173 and 16-24 lb. toms at 164-175 cents FOB for current shipments. The market on white meat and white trim is steady to weak. Demand is light. Offerings of fresh white meat are light. Frozen white meat and white trim offerings remain light. Cooked and deli demand very light. Grade A consumer sized breasts, institutional sized breasts are steady to weak. Tom drums, full-cut ,and V-type wings are steady with the balance of bulk parts mostly steady. Demand light to instances moderate. Offerings short to light. The thigh meat market is steady. Demand light. Offerings very light to light. Defatted gizzards, hearts and livers steady. Demand and offerings light. Tails steady. Demand and offerings light. Tom necks weak with demand very 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 mostly steady with spot weakness. Demand light. Offerings very light to light.



*Fresh Is Everything*

630-665-9665 | [GETFRESHPRODUCE.COM](http://GETFRESHPRODUCE.COM)