

Overview

South Florida is quickly winding down for the season and will continue to see more items transition to South Georgia. In Nogales and McAllen, we are seeing transitions well underway, particularly on **Tomatoes** as Sinaloa wraps up for the season and productions moves to Sonora, Jalisco and Baja. Markets remain firm this week on Rounds and do not see any supply issues. Quality remains strong on new crop out of Mexico and Florida may see some issues due to rain. We expect to see Tomatoes start in California, South Carolina and South Georgia early June.

Mixed veg transitions are well underway to California and South Georgia. Good production is available on **Corn** and **Green Bells** out of Coachella this week and quality is outstanding. New crop **Slicer Cucumber** is ramping up out of Georgia and Baja. Items that remain light in supply are premium sized **Green Bells, Pickles, Shishito Pepper, Tomatillo** and **Habanero**.

The offshore **Table Grape** quality and supply are stable; Mexico is forecasted to start over the next 7 to 10 days. Offshore **Melons** are on the backside of the season and volume will steadily decrease over the coming weeks; transition to desert fruit will start in over the next 10 to 14 days. **Banana** and **Pineapple** availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. Banana supply will be volatile over the next several weeks due to a labor strike in Panama impacting the global supply chain. We do not expect major shortages at this time and are keeping a very close eye on this situation.

New crop available out of California on yellow/white **Peaches, Cherries** and **Apricots**, there are also **Peaches** available in the east out of Georgia and South Carolina; volume will gradually increase over the coming weeks. **Plums** are still a few weeks out.

Avocado supplies have increased in anticipation of strong Memorial Day promotional activity. As the holiday passes, demand is expected to ease, and field prices have already softened in response. Mexico is nearing the end of its season, with slowing production as offshore arrivals ramp up. Late-season fruit continues to show high dry matter and a notable percentage of Grade 2s. Meanwhile, California is harvesting at strong levels, providing consistent quality fruit. Peru is steadily shipping to both coasts, supporting summer programs with robust demand across all sizes. Total U.S. avocado volume is expected to remain stable through June, similar to last week. Peruvian supply will double over the next two weeks, contributing to continued soft market pricing during this period. As programs shift from Mexico to Peru, spot market opportunities will vary, reflecting the transition in demand. In terms of size curve, Mexico's Loca crop will skew toward smaller fruit, while Peru will focus on 48ct and larger. Colombia is contributing 60ct and smaller fruit, and California maintains a balanced size curve, peaking on 48s with availability across all sizes. The upcoming transition to Mexico's Loca crop is a key period to monitor. While past seasons have seen delays, none are expected at this time—though the industry remains cautious, given the unpredictability that often surrounds avocado transitions.

The weather is heating up in Salinas. They had a little heat wave at the beginning of the week. We are keeping a close eye on all the wet veg items to see if it has any lingering effects. We are also still keeping an eye on the insect pressure. It has been minimal so far, but it is still early in the season. Overall, supplies and quality are still looking good. **Lettuce** supplies and quality are starting to change a bit with some growers due to INSV. There has been some decrease in supplies. We may see the market firm up a bit. **Broccoli** and **Cauliflower** look very good right now and have great supplies, but **Broccolini** is getting a bit tight. The market has gone up and you will see some growers escalating pricing in the coming weeks due to the limited supplies. **Spinach** quality and supplies are just okay right now and is something we are keeping an eye on. **Brussels Sprouts** continue to be light in supplies. The market is still at the extreme level, but quality and supplies are improving. The market is trending down and will hopefully continue to do so. Jumbos are still limited, and sizing is leaning more towards small and medium. **Bok Choy, Napa, Endive, Escarole, Fennel** and **Leeks**. Leeks remain escalated, with supply shortages driving the market. **Parsley** has finally returned to regular pricing and looks good. Overall production in Salinas is still steady.

MARKET ALERT

EXTREME



Brussels Sprouts



Celery Organic



Fennel

ESCALATED



Avocados



Banana



Bok Choy



Endive & Escarole



Fennel



Hot Peppers
Caribe, Habanero, Shishito



Leeks



Limes
extreme - large sizes



Napa



Tomatoes

WATCHLIST



Asparagus



Broccolini



Cabbage Red



Celery



Cilantro



Eggplant



French Beans



Herbs



Honeydew



Green Onion



Iceberg & VA



Lemons & Oranges
small sizes



Pickles



Pineapple



Romaine & Hearts



Snow & Sugar Snap Peas



Spinach



Yellow Squash

FRUITS & VEGETABLES

Avocados: ESCALATED The U.S. avocado industry closed at 59.6M pounds last week, representing a 3% decrease from the previous week. Mexico's volume declined by 12%, while all other countries of origin (COOs) saw increases. Jalisco accounted for 6.4% of the Mexican volume shipped to the U.S. Weekly industry volumes are expected to remain steady through June, though COO market shares will continue to shift. Mexico is projected to fall below 50%, while both California and Peru are expected to reach 25% of total supply. In the field, fruit is predominantly small, with a high percentage of Grade 2s. The Main Crop is currently testing at 37% dry matter, with approximately five weeks remaining in the 2024–2025 season. The Off-Bloom Crop (Loca/Mendez) is expected to begin around the traditional July 1st start. California harvested approximately 15.4M pounds in week 20, with dry matter averaging 27%. Sizing is peaking on 48s and 60s, and strong demand leading into Memorial Day continues to support movement. Quality remains high, with consistently strong eating characteristics. The state is expected to maintain steady volume throughout the summer. The 2025 Peruvian season is now underway, with shipments reaching global markets, including consistent arrivals into the U.S. Sizing and quality have been strong, and the industry expects robust promotional activity throughout the season. Meanwhile, Colombia's Travesia Crop offers promotional opportunities on medium and small fruit, with dry matter levels improving steadily as the season progresses.

BERRIES

Strawberries: Overall volumes continue to improve with continued favorable weather. In Santa Maria, temperatures climbed into the low 70s, with overnight lows in the mid-50s. The forecast remains stable, with no rain expected and highs continuing in the low 70s. While minor tip issues persist, overall quality remains strong. With warming conditions, production is expected to ramp up again over the next one to two weeks. Last week marked peak production for many blocks, and volumes should hold through this week before gradually tapering. Organic volumes are building steadily, with peak levels expected between next week and early June, supporting a strong supply position into late June. In the Watsonville/Salinas region, the weather has been cooler but dry, with highs in the mid-60s and overnight lows in the upper 40s. Conditions are projected to improve next week, with temperatures reaching the upper 60s to low 70s. The cool weather has preserved excellent fruit quality, although some bruising and dry calyxes have been observed in select varieties. Organic fruit remains slightly behind conventional in size but maintains a strong overall quality. Production estimates continue to increase, with a seasonal peak expected in June. All pack sizes are currently available, supported by strong volume, excellent sizing, and consistent quality.

Bananas: ESCALATED Banana imports remain extremely light for the next 4 weeks. We continue to struggle with several challenges of recent including record demand and overall lighter supply from the tropics. We are also seeing some logistical challenges due to the labor strikes in Panama that are impacting the global supply. Due to these challenges, we could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good and improving as we enter the summer grow cycle. Overall inventories are light, and we are seeing higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to keep a heavier than normal inventory on hand and self-manage color to protect from shorts..

Pineapples: WATCHLIST Pineapples will remain tight and are not expected to show any improvement until May. We are suggesting flexibility in sizes to ensure stability of the supply chain. Overall quality and taste are good.

Table Grapes: Stable supply is available on colors and varieties. Mexico is expected to start over the next week to 10 days and California mid to late June.

Blackberries: In Mexico, weather conditions remain hot with significant temperature swings, ranging from highs in the 80s to 90s and lows in the 50s, as the region enters its hottest period ahead of the June rains. Blackberry quality remains strong, with medium to large sizing, good sheen, predominantly black color, and firm texture. However, elevated temperatures have contributed to some quality challenges, including red cell regression, attached calyx, and occasional soft or leaking fruit. Volume is steady, though currently in a production dip expected to persist through early May. Peak volumes are anticipated from late May through June. Organic blackberry production is expected to resume in early May with limited volume, gradually ramping up toward the end of the month. In Watsonville, conventional production started with minimal volumes.

Raspberries: In Mexico, current weather conditions are hot with significant temperature swings—highs reaching the 80s to 90s and lows in the 50s—as the region enters its hottest stretch before June rains. Fruit quality remains strong with good red color, solid firmness, and mostly medium sizes, though occasional larger berries are present. Some overripe and crumbled fruit is being observed due to the heat, but crews are working diligently to exclude affected fruit from packs. Raspberry volume is currently in a dip but is expected to increase steadily through May, followed by a brief slowdown in late May to June before picking back up again in July and August. Organic raspberry volume is anticipated to resume next week. In Watsonville, conventional production is projected to begin in July, with no organic volume expected from this region this season.

BERRIES - CONTINUED

Blueberries: Weather remains hot with wide temperature swings, with highs in the 80s–90s and lows in the 50s, as the region enters its hottest period ahead of the June rains. Conventional volume is declining weekly, with the season expected to wind down by July. Organic production is anticipated to resume in August. Overall quality is good, with strong flavor, bloom, and appearance, though some heat-related issues are present, including redberrys, soft or leaking fruit, and shriveling. Out of Oxnard, Temperatures rose slightly this week, with highs in the low 70s and lows in the 50s. Organic production has passed its peak and will decline steadily until the season ends in late May. Quality remains excellent, featuring strong size, bloom, and flavor. The region has seen hot weather, with highs in the upper 80s and lows in the 60s. Florida is currently at its production peak but will be declining shortly, though volumes remain 30–50% below forecast due to earlier hurricanes, storms, and heatwaves. Only conventional fruit is being harvested. Despite the reduced volume,

quality has been excellent. Weather conditions have been warm, with highs in the 70s–80s and lows in the 50s. The region is currently producing conventional fruit, with peak production expected shortly. Like Florida, yields are down 30–50% from original estimates due to prior weather events. The season is expected to conclude quickly by early June, and open market volume remains limited. Hot and sunny weather continues, with highs in the 80s and lows in the upper 50s in the Central Valley. Warm temperatures are accelerating both organic and conventional production. Organic volumes are at peak levels, continuing through mid-June. Initial conventional harvests have begun, with excellent quality observed. Peak conventional volumes are expected toward the end of May, although open market availability remains limited. Production is expected to begin around July, providing a transition into summer volume.

CITRUS

Oranges: WATCHLIST ON SMALL SIZES Quality remains very good with good demand. Pricing on 88's and smaller, primarily 113's and 138's, continues to strengthen as the size structure is now trending heavier to larger sizes. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages. In addition, the Navel season is expected to finish in early to mid-June depending upon the shipper with Valencia's expected to start in mid-June. Early projections are for the Valencia crop to be down with the early fruit being smaller in size and large sized volume increasing as we move through the early summer months.

Limes: ESCALATED ON SMALL SIZES & EXTREME ON LARGE SIZES Extreme shortages on large sizes (110's, 150's and 175's) continue as the high temperatures in the growing areas have accelerated fruit maturation, leading to a prevalence of smaller-sized limes (200's, 230's and 250's) with an extreme shortage on large sizes. The market remains elevated on large sizes and is expected to remain elevated for the next few weeks with increasing concern about fruit quality.

Lemons: WATCHLIST ON SMALL SIZES We continue to see very good quality out of all growing areas in California. Most shippers are reporting small sizes, 165's and smaller, becoming extremely light in supplies and will continue for the next 4 to 6 weeks, while mid-to-larger sizes, 140's and larger, remain readily available. The market is stronger on smaller sizes.

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Imports/Specialties: Blood Oranges are still being packed but will be finishing for the season between the middle to end of May. Sizing is running small. Cara's are also available and will be finishing Mid-to end of May. California Mandarins are in good supply with very good quality. California Grapefruit is available with light supplies on Fancy grade; choice grade are readily available.

WEST COAST LETTUCE

Iceberg: WATCHLIST Lettuce supplies, and quality are good, but we are seeing INSV creeping into some fields. We expect to see the market firm up because of this.

Iceberg VA: Quality and supplies look good but could be affected by INSV if it persists in the fields.

Romaine VA: Quality and supplies are good but could be an issue if INSV persists in the fields.

Romaine, Romaine Hearts: WATCHLIST Romaine and Romaine heart quality and supplies are good. There have been some reports of fringe burns and light cupping. Insect pressure could become an issue as we get into Spring weather. We have also had some initial reports of small amounts of INSV and sclerotinia in some of the romaine fields. We are adding this to the watchlist as we monitor that situation. The market is starting to trend a bit higher.

Green and Red Leaf: Quality and supplies look good.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Seeing short supply in Nogales, particularly on large sizes. Coachella is scratching this week. South Florida is still seeing higher prices on premium sizing while choice fruit is plentiful; we should transition to South Georgia around the 10th of May.

Color Bell Pepper: Good supply available in Nogales and South Florida. Quality is mostly good. Canada started crossing limited volume on HH Bells and this will gradually increase over the coming weeks. We should see some La Rouge yellow and reds out of the desert Mid-May.

Mini Sweet Pepper: Supply stable this week loading in Nogales and Florida.

Mixed Chili Pepper: **ESCALATED** Supplies in general are good across most varieties out of Mexico, but quality is mixed. We should scratch new fields in Sonora over the coming weeks which will improve supply and quality. Jalapeño and Poblano were lighter this week. Habanero, Tomatillo and Shishito will be the shortest and could see some supply interruptions. California should start production in early June and South Georgia over the next 7 to 10 days.

Eggplant: **WATCHLIST** Lighter domestic supply continues, and quality is mixed. Good supply and excellent quality out of Mexico this week. South Georgia and California should start next week.

Slicer Cucumbers: Lighter supply crossing through Nogales and McAllen as well as Florida. We are seeing very light supply on supers and plains. Quality is good and markets were firmer this week due to transition; we expect to see better volume in two weeks. South Georgia production has begun...quality is good.

English Cucumbers: Good supply available this week crossing from Mexico. Quality on new crop out of Mexico was good.

Pickles: **WATCHLIST** Lighter supply available crossing through Nogales and we may see some shorts on market buys as contracts are getting priority on volume. Quality is outstanding.

Green Beans: Good Supply available with new crop beans coming available out of Georgia and Florida. Coachella should ramp up over the next week. Quality is good.

French Beans: **WATCHLIST** Production has improved in Guatemala thanks to favorable weather and much-needed rainfall. However, vessel delays continue to impact logistics. In contrast, there is a good supply of French beans out of Mexico, with steady movement.

Zucchini/Yellow Squash: Good volume and quality available shipping from all locations on Italian and Yellow from Florida; we have started production in South Georgia with volume ramping up and good quality. Volume out of Nogales is winding down for the season and will transition to California and Baja.

HERBS

WATCHLIST Out of the East, basil quality continues to be impacted by persistent rain in Colombia. Imported chervil volumes are limited due to adverse weather conditions in Ecuador. Meanwhile, out of the West, basil supply and quality are steadily improving. Supply on all other herbs remains stable.

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

Stronger retail demand and delayed vessels have quickly shortened the offshore cantaloupe market. FOB pricing remains firm this week. We do expect transition from our offshore program to the desert on May 19th. Volume is going to decrease daily on offshore fruit with limited availability on open market sales. Bin Athena Cantaloupe is available out of Florida and cartons are available out of Mexico.

Cantaloupe: Quality is excellent and fruit shelf life is strong with extended shelf life and high shell color. Brix levels are holding mostly in the 14-16% range that has been seen in recent weeks; sizing profile will be heavy sizes (5-6's to 9's) while 12's and 15's will be limited.

Watermelon: Watermelon are improving but demand remains strong loading out of Mexico and Florida. Smaller sizes will remain tight, and new fields are producing mostly larger fruit. Prices are expected to stay strong on bins and cartons. There are some deals available on 11ct minis.

Honeydew: **WATCHLIST** Honeydew production is extremely short due to a GAP in Mexican Production. Being flexible on sizing is necessary for the next week to 10 days. Brix levels are mostly in the 12-14% range, shell quality is mixed.

MIXED VEGETABLES

Artichokes: Supplies and Quality are both good.

Asparagus: **WATCHLIST** Baja continues with low volume due to weather. Peru continues to increase volume, but mostly with smaller sizing. Michigan has started with good production. Cooler nights are expected next week which may slow down production. Markets are less active with more Peruvian grass in the market and domestic regions starting up as well.

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

Broccoli/Broccoli Crowns: Quality and supplies are good.

Broccolini and Sweet Baby Broccoli: **WATCHLIST** Quality is good, but supplies are getting light. You will likely see some growers escalate pricing due to the increased market and limited supplies in the coming weeks.

Brussels Sprouts: **EXTREME** Quality continues to be an issue. Growers are covering 10-week averages, but supplies are slowly starting to improve. Seeder and sizing still lean towards medium and smalls. Jumbos are very limited. Insect injury and elongated core are some of the main obstacles. The market has continued to rise and will stay escalated at the extreme level until supplies are back to normal.

Carrots: (JUMBOS, MEDIUMS and CELLOS) The Desert growing regions are finishing for the season and will be transitioning to the Central San Joaquin Valley and southern Monterey County growing regions for the summer with good supplies and very good quality.

Cauliflower: Quality and supplies are good.

Celery: **WATCHLIST** Quality is good, but supplies are light with some growers. The Organic Market is increased.

Corn, Sweet: Excellent supply out of Coachella and Brawley has started while volume remains steady out of Florida with Georgia on the horizon. Quality is good in all locations.

Fennel: **EXTREME** The fields are seeing lower yields and therefore there is a shortage in supply. Pricing will stay escalated until supplies improve.

Kale: Supplies have improved, and quality is good.

Leeks: **ESCALATED** Leeks are very tight right now and some growers are holding to averages. The market remains escalated.

Garlic: The 2024-2025 California Garlic season is coming to an end and as is sometimes the case during the transition from old crop to new crop garlic, there is a supply gap before the new California harvest begins. Starting the week of May 19th, we will see growers supplementing with product from Mexico to bridge the gap until new crop California Garlic gets started the first week of August. Quality will remain very good through this transition.

Ginger: Supplies and market are steady.

Green Cabbage: Supplies and quality look good.

Green Onions: **WATCHLIST** Supplies and quality look good but there have been some initial reports of light supplies.

Mushrooms: Promotable volume available and 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 is good, but supplies are still light with some growers. The market remains very active.

Spinach: Supplies, and quality are good. We have seen some reports of weak texture, discoloration, wilting and there have been some insect damage but it is all minimal right now.

Snow Peas and Sugar Snaps: Guatemalan snow pea supplies are limited, while sugar snap volumes remain stable. However, quality concerns may arise due to elevated humidity in the growing region. In Mexico, production of both snow peas and sugar snaps remains steady.

ONIONS:

The onion market is not expected to react much until the Northwest is entirely out of the picture. At this point, we do not anticipate that taking place until May. Even then, there may still be some leftover product floating around in that region. Texas onions are just getting going and they are expected to have a big crop. Additionally, Southern California will start in about 4 weeks, and they are expected to have a lot of product. So, in the first 2 months of Q2 (April/May) there is not presently a lot of optimism.

However, June is a bit of a wildcard. At that point, Texas is done, the Northwest is done, Southern Cal will be mostly finished, and we will be exclusively into New Mexico and Central California at that time. It is basically a fresh start during that period, so the market has as good of a chance of improving as it does staying stagnant.

POTATOES:

The market remains stable, though carton production is starting to decline. With Norkotahs expected to phase out over the next 3-4 weeks, supply will shift solely to Burbanks, leading to a notable drop in production. As production decreases, we anticipate some market increases. However, if demand increases, the market could strengthen significantly, though that remains uncertain.

Planting for the upcoming season will take place throughout April, with acreage expected to be similar to the current year. Given the depressed market conditions this season, there is some concern about similar supply levels next year, particularly if yields remain consistent.

TOMATOES:

EAST COAST

Round and Roma Tomatoes: **ESCALATED** Rain and light production has caused markets to increase and should adjust over the coming days as growers go back in and pick after the fields dry out. Quality will be mixed. Georgia and South Carolina will start next month and should stabilize the market.

Snacking Tomatoes (Cherry, Grape and Medley):

ESCALATED Lighter supply available due to the rain, quality remains good.

California, Georgia & South Carolina forecasted to start in early June.

OTHER FRUIT:

Apples: Organic Apple and Honeycrisp supplies remain extremely limited out of Washington. Pricing has risen significantly and is expected to continue increasing until the next harvest.

Pomegranate: Limited availability.

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

Cherries: New crop Available out of California!

Tree Fruit: New crop Peaches and Apricots now available out of California. Peaches are now available in South Carolina and Georgia as well.

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

Quince: Limited supply available this week.

Pears: The Northwest Pear Crop (Washington/Oregon) is substantially down from last season due to below average temps in late Feb/early March affecting bud development. The higher elevation areas in Washington were severely impacted, especially the Wenatchee Valley. The Oregon Growing Region was not affected as much as Wenatchee, Washington, but it was still impacted. The Bartlett Crop out of the Northwest shows 3.8 million shipped last season vs a projected 2.9 million

DAIRY:

While the weekly averages didn't change much this week, the U.S. market is feeling well supported with spot cheese, whey and NFDM all strengthening on Thursday. The CME futures are all anticipating more upside as well. Nearby EU futures were roughly steady for the week, but deferred cheese prices rallied. We were light on data this week but there will be a ton of stuff to digest next week. I don't think the lagging data will give us much insight into what is driving the current strength in the market though. My guess is buyers (domestic and export) have been anticipating weakness which hasn't developed. Now there are looking at seasonally falling Northern Hemisphere supply and they are getting more aggressive.

MEXICO

Round Tomatoes: Plenty of new crop production available out of Jalisco, Baja and parts of Central Mexico. Demand from the east was keeping upward pressure on the FOB market but that has settled this week for the holiday weekend. Quality is outstanding on new crop while there are still some lingering quality issues with residual winter production.

Roma Tomatoes and Snacking Tomatoes (Cherry, Grape, Medley): Steady supply and light demand have put downward pressure on FOB pricing, quality remains good.

Tomato on the Vine: Stable Volume available this week.

this year for a 14% decrease. It's not substantial in terms of overall volume, but it's still a factor. The cold temperatures will affect the grade, so more. Because the crop is smaller, the size profile has increased by 1 to 2 sizes. Barts to finish by the end of Feb./ first part of March. Anjou report at least a 30% total decrease, or 1.85 million boxes less than last year. Also, out of the Wenatchee Valley, there will be more fancy and, for the first time in many years, a 3rd grade anjou packed. When we start to pack Anjou – I will share pics of 3rd grade, this will be your value pear. Anjou to start the week of September 16th, and if growers make it through June I will be surprised. Red Anjou are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjou is whether or not we will see smaller pears such as 120/135cts. Red pears are supposed to be 1 to 2 sizes larger out of the PNW. Red pears have started with Starkrimsons and will transition into Red Anjou from November through May. Bosc are down 63% out of the great Northwest or 1.38 million boxes. This variety was mostly affected, and markets will be much higher than in previous years. Bosc has slowly started with a potential end date last January/middle of February.

SHELL EGGS:

National FOB shell egg weighted average prices are steady to higher for caged eggs. The undertone is steady to fully steady. Retail demand is in a range of light to occasionally fairly good. Loose egg movement is light to moderate. Offerings are light to moderate. Supplies are generally moderate. Market activity is moderate. California weighted average delivered prices are steady to lower, although lightly tested. The undertone is weak. Retail demand is light to moderate. Food service demand ranges light to instances fairly good. Offerings are light to at times moderate. Supplies are moderate. Market activity is slow to moderate.

BEEF:

The cutouts moved sharply higher yesterday. The Choice cutout posted a daily gain of \$3.94/cwt, while the Select cutout rose \$0.85/cwt to \$344.96/cwt.

This week's harvest is expected to range between 565,000 and 575,000 head. With Monday being a holiday and plants dark, next week's harvest is projected at 525,000 to 535,000 head. Product availability will be very tight, and prices have limited downside until the next full production week.

Father's Day is the next grilling holiday and will lend additional support to beef prices through the first week of June. Cattle are expected to trade steady this week.

PORK:

Pork demand should have a solid tailwind in the weeks ahead. Given the steady decline in beef availability and continued increases in beef prices, pork is well-positioned to benefit from spillover demand. This dynamic, combined with the normal seasonal reduction in pork production, is likely to result in firmer pork prices as we move forward.

This week, pork butts are experiencing strong seasonal demand and prices are firm. Ribs are also in good shape as we head into the holiday period. Trim remains steady, and bone-in hams continue to move to Mexico, supporting pricing and keeping availability tight.

Freezer stocks for bellies are historically low, which should lend further support to that category.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - The market on frozen 8-16 lb. hens and 16-24 lb. toms is steady to firm. Frozen Grade A 8-16 lb. hens and 16-24 lb. toms demand is light to moderate. Offerings short to light. Frozen basted equivalent 8-16 lb. hens offered at 111.00-122.00 and 16-24 lb. toms 110.00-142.00 cents FOB for current deliveries. Trading slow on frozen basted equivalent 8-16 lb. hens 122.00 FOB and 16-24 lb. toms 110.00-142.00 cents FOB for current shipments.

The market on tom breast meat and destrapped tenderloins is steady to firm with frozen tom breast meat strongest. Demand moderate to good and showing signs of slowing for the upcoming holiday weekend. Offerings light at best. The market on white trims is steady to firm. Demand moderate.

The futures market has been highly volatile, with sharp run-ups to contract highs followed by steep sell-offs. We remain in peak beef demand season, yet production continues to be curtailed. As a result, the market is rationing available supplies through higher prices.

This week, Ribs, loins, and grinds: Prices are supported, with some upside potential remaining. Outside cuts: Mostly steady. Competing proteins: Chicken and pork continue to see increased demand due to high beef prices.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS - Prices are trending at least steady for WOGS and whole fryers. Supplies are adequate. Demand is mostly moderate approaching the Memorial Day holiday weekend. Floor stocks are sufficient. Market activity is moderate. In the parts sector, prices continue to trend firm for tenders; steady to firm for dark meat cuts and steady for b/s breasts, fronts and bone-in breasts. Wings are about steady with medium and jumbo-sized wings in a slightly longer position. Supplies of tenders are tight; light to moderate for bone-in breasts, b/s breast, fronts and dark meat cuts with drums, legs, leg quarters, thighs and thigh meat clearing well. Wings are moderate to heavy. Demand is moderate to good. Market activity is moderate to active.

EXPORT MARKET HIGHLIGHTS - Export demand is moderate.

Offerings short to light. Further processed demand moderate to good. The consumer sized breast market is steady to firm. Demand and offerings light. Institutional sized breast markets are steady to firm. Demand light to moderate. Offerings light and held with confidence. The hen and tom bulk parts markets are steady to firm. Demand moderate to good. Offerings short to light. The thigh meat market is steady to firm. Demand moderate to good. Offerings short to light. Hearts, livers and defatted gizzards mostly steady. Demand light to moderate. Offerings light. Mechanically separated turkey (MST) is steady to firm. Demand moderate to good. Offerings short to light. Trading slow.

EXPORT MARKET HIGHLIGHTS - Trading slow. Market steady to firm. Demand moderate to good. Offerings short to light.



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