Fresh Is Everything

Weekly Market Review
May 9, 2025

Overview

We will continue to see strong production out of South Florida on several items, with good quality and availability across multiple commodities with similar to slightly lighter volume being observed in Nogales and McAllen. We will see more mixed veg transitions over the coming weeks as California and South Georgia start to scratch on summer veg.

Good production available on **Corn** and **Green Bells** out of Coachella this week and quality is outstanding. We should start new crop, **Slicer Cucumber**, in Baja next late next week. Winter **Tomato** volume is gradually decreasing as we move into May and the transition to summer production quickly approaches. Markets ticked up this week on Romas and Rounds due to this, fortunately we are not seeing any supply issues. Quality remains strong out of Florida as well as Mexico particularly on new crop out of Sonora, Baja and Jalisco. We expect to see Tomatoes start in California and South Georgia early June.

The lighter items in supply are **Green Beans**, premium sized **Green Bells, Pickles, Shishitos** 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 2 weeks. **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.

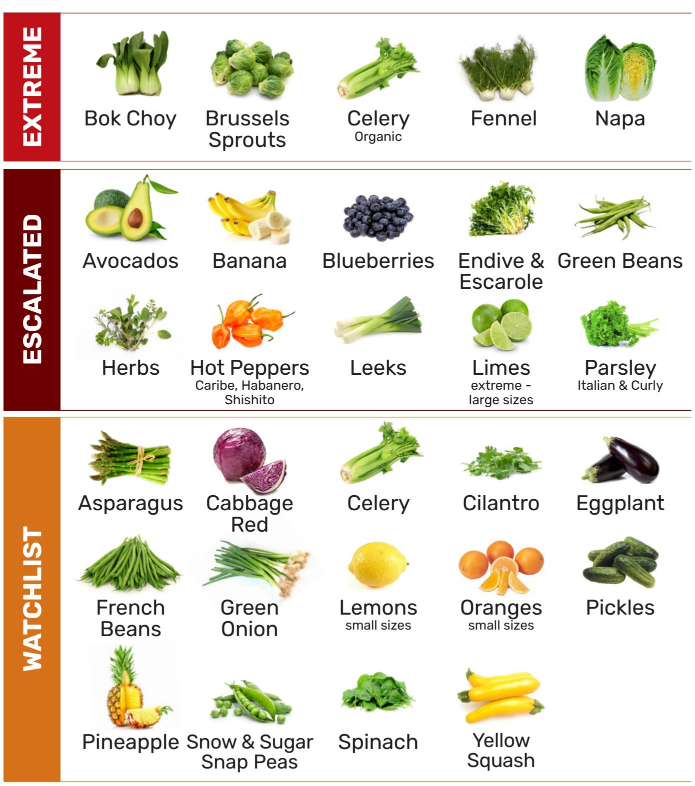
New crop available out of California on yellow/white **Peaches**, **Cherries** and **Apricots**, there are also Peaches available in the east out of Georgia and South Carilina; volume will gradually increase over the coming weeks. **Plums** are still a few weeks out.

Cinco de Mayo, typically the second-largest **Avocado** event of the year, has felt underwhelming in 2025. Market pricing is trending downward as increased volumes from multiple countries of origin begin to dilute Mexico's dominance. California is peaking on 48s, Colombia is strong on 70s, and Peru is contributing larger fruit, providing greater size diversity in the market. This shift comes at an inopportune time for Mexico, whose key size this season—the 60 count—is currently at its highest share of the size curve since Week 8. Mexico's market share dropped to 69% last week and is expected to decline further as Peruvian volumes increase steadily, with peak arrivals anticipated in July. Industry inventory levels have held steady week-over-week. With post-Cinco demand softening, additional short-term availability is expected at the border. Prices are beginning to ease on select sizes, though overall market conditions are anticipated to remain stable as Memorial Day demand builds. A high percentage of Grade 2 fruit continues to be reported out of Mexico, which is typical for the late season. Meanwhile, California harvests remain steady, supported by favorable field conditions and excellent fruit quality. The Peruvian season is now underway, with programs available across all sizes and arrivals ramping up to meet summer promotional activity.

Salinas is in full swing, and we are grateful to all the growers and the fantastic job they did during Transition. It's always a hectic time but our growers were amazing this year.

We also want to take the time to say Happy Mother's Day to all the moms out there. We hope you all have an amazing day and get the pampering you deserve! Now back to produce talk. We continue to see nice Spring weather. Spring does bring rain, and there is some in the forecast for next week. That could cause some increased insect pressure. We will keep an eye on that and report any issues. **Lettuce** supplies are looking good, and the weights all seem to be back to normal. **Leafy Green, Broccoli** and **Cauliflower** all also look good right now. The one major issue seems to be the **Brussels Sprouts**. You can continue to expect to see light supplies and some quality issues. Jumbos are still very limited, and sizing is leaning more towards small and medium. Growers are navigating this the best they can, but for now, the market is escalated and will stay that way until supplies improve. **Endive, Escarole, Fennel. Leeks** and **Parsley** remain escalated, with supply shortages driving the market. **Bok Choy** and **Napa** remain at the extreme trigger level. Overall production in Salinas is still steady, and we are looking forward to a great season!

MARKET ALERT



FRUITS & VEGETABLES

Avocados: ESCALATED Most markets saw a decline in pricing, with the exception of 84s, which remained stable. The U.S. avocado industry closed last week at 63.6M pounds, reflecting a 21% increase over the previous week. Although projections following Holy Week called for volumes around 70.5M pounds, U.S. inventories remained above 55M pounds throughout the week. Current volume levels are sufficient to support Cinco de Mayo promotions. While a holiday in Mexico will pause harvest operations on Thursday, strong arrivals from other countries of origin are expected to keep the supply chain uninterrupted. Approximately 15M pounds were harvested during Week 18.5 out of California, with dry matter averaging 26.4%. Sizing is peaking on 48s and 60s. California's harvest is now in full swing, and the industry expects steady volumes to continue throughout the summer. The 2025 Peruvian avocado season is ramping up, with volumes now shipping to global markets. Program arrivals are expected to begin by late May or early June. Sizing and quality have been strong in export markets, and robust promotional activity is anticipated in the U.S. throughout the summer. The Traviesa crop is well underway, with shipments heading to both the U.S. and Europe. As the peak of the season approaches, volume projections remain promising, particularly for medium and small sizes, which are expected to support promotional efforts.

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.

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.

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

BERRIES

Strawberries: Overall volumes are improving with better weather. In Santa Maria, last week's cool, overcast pattern persisted, accompanied by 0.35–0.50 inches of rain between Friday night and Saturday morning. While isolated hail was reported south of town, the valley remained unaffected. Breezy conditions and highs in the 50s–60s helped mitigate damage, and as the week progressed, temperatures rose into the mid-to-upper 60s, with overnight lows in the upper 40s. Forecasts call for stable weather with no rain and highs reaching the low 70s. Fruit quality held up well, with only 5–10% of ripe fruit showing minor water damage thanks to early harvests at light color stages and proactive fungicide use. While some minor tip issues persist, overall quality is strong, and with warming temperatures, production is expected to increase again in the next one to two weeks, and last week marked peak production for many blocks, which should hold through mid-month before tapering. Organic volumes are building steadily, with peak levels expected between mid-May and early June, supporting strong supply into late June. Meanwhile, the Watsonville/Salinas region experienced similar but colder weather, with dry fields and highs in the low 60s and lows in the mid-40s. Conditions are expected to improve next week, with highs approaching the upper 60s to low 70s. Quality continues to improve, with large fruit and pack counts of 10–16 per case for both conventional and organic. Cold weather has preserved excellent quality, though some bruising and dry calyxes are present in certain varieties. Organic fruit is slightly behind conventional in size but maintaining strong quality, with production estimates increasing weekly and a seasonal peak anticipated in June. All pack sizes are currently available with strong volume, excellent sizing, and consistent quality.

Blackberries: In Mexico, weather conditions are currently hot with significant temperature swings—highs in the 80s to 90s and lows in the 50s—as the region enters its hottest period before June rains. Blackberry quality remains good, with medium to large sizing, strong sheen, mostly black color, and good firmness. However, the high heat has led to some issues, including red cell regression, attached calyx, and occasional soft or leaking fruit. Volume is steady but currently in a production dip expected to last through early May, with peak volumes anticipated from late May through June. Organic blackberry production is expected to resume in early May with small volumes, ramping up toward the end of the month. In Watsonville, conventional blackberry production is projected to begin in mid-May, with organic production following in June.

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: ESCALATED Overall supplies are increasing and should be considerably improved by the end of next week. Out of Mexico, the current weather is hot with wide temperature swings—highs in the 80s to 90s and lows in the 50s—as the region moves through its hottest period ahead of June rains. Conventional blueberry volume is declining weekly, with the season expected to wrap up by July. Organic production is anticipated to resume in August. Berry sizing ranges from 12–16mm, and overall quality remains good, with strong flavor, bloom, and appearance. However, some issues are present, including redberries, soft or leaking fruit, and shriveling due to heat. Cool, overcast conditions persisted this week in Oxnard, with highs in the 60s and lows in the 40s. Warmer temperatures are expected next week, with highs reaching the low 70s. Organic blueberry production has passed its peak and will decline steadily until the season ends in late May. Quality remains excellent, with strong size, bloom, and flavor. The weather has been hot, with highs in the upper 80s and lows in the 60s in Florida. The region is currently at the peak of its production curve, but volumes remain 30–50% below original estimates due to earlier hurricanes, storms, and heat waves. Only conventional fruit is being harvested, and while volume is reduced, quality has been excellent. Similar to Florida, Georgia experienced warm weather this week, with highs in the 70s to 80s and lows in the 50s. The region is producing conventional fruit, with peak production expected shortly. However, yields are also down 30–50% from original forecasts due to prior weather events. The season is expected to end quickly in early June. Open market volume is limited. Conditions have been hot and sunny in the Central Valley, with highs in the 80s and lows in the upper 50s. Warm weather accelerates both organic and conventional production. Organic volume is ramping up quickly, with peak production expected in the next one to two weeks and continuing through mid-June. Initial conventional pickings have begun, and quality looks excellent. Peak conventional volume is expected toward the end of May. Open market availability remains limited. Production in Oregon, Washington, and British Columbia is expected to begin around July.

CITRUS

Oranges: 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 Ongoing high temperatures of 96° highs and 79° lows in the growing areas are accelerating fruit maturation, leading to a prevalence of smaller-sized limes (200's, 230's and 250's) with an extreme shortage on larges sizes (110's, 150's and 175's). Market remains elevated and is expected to remain elevated for the next few weeks with increasing concern about fruit quality.

Lemons: 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. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages.

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: Lettuce supplies, and quality are good.
Iceberg VA: Quality and supplies look good.
Romaine VA: Quality and supplies are good.
Romaine, Romaine Hearts: 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.
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 good this week. Caribes, Habanero and Shishito were shorter this week. California should start production in early June and South Georgia by the 2nd week of May.

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 the 3rd week of May.

Slicer Cucumbers: Lighter supply crossing through Nogales and McAllen as well as Honduras. We are seeing short supply, particularly on selects and supers. Quality is good and Markets were firmer this week due to transition; we expect to see better volume in two weeks. South Georgia is expected to start May 10th.

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: **ESCALATED** Very light supply going into the Easter Holiday out of Mexico as well as Florida as seasonal crops wind down. We will see variances in quality out of the east as growers pick from blocks that were impacted by weather earlier this year in the south. Quality and volume should improve over the next 2-3 weeks once transition gets underway to Coachella and South Georgia.

French Beans: **WATCHLIST** Production in Guatemala remains limited due to a continued lack of rainfall, and vessel delays are further impacting shelf life. As a result, supply will remain extremely low through the end of the week. In contrast, there is a strong supply of French beans out of Mexico, helping to offset some of the regional shortfalls.

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

ESCALATED In the eastern regions, basil quality remains challenged due to ongoing rain in Colombia, though supply and quality are gradually improving, albeit slower than anticipated. Imported chervil volume is limited as adverse weather in Ecuador continues to impact production. Out of the western regions, supply and quality remain steady and are improving, but slower than expected. Both should continue improving as the weather improves.

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 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.

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 supplies are lighter, and demand is strong 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 binds and cartons. There are some deals available on 11ct minis.

Honeydew: Honeydew production will drop off this week with sizing still strong leaning to 5s-5Js; 6ct has been extremely limited. We are seeing a bit more scar, but overall quality has been solid. Brix levels are mostly in the 12-14% range. We may see a bit more Mexican fruit available in the market.

MIXED VEGETABLES

Artichokes: Supplies and Quality are both good.

Asparagus: ESCALATED Asparagus supplies have improved with increased volume from Peru, and a complete transition to Peruvian production is expected by mid-May. Domestic harvesting has also begun in Washington, with Michigan anticipated to start mid-month. Market pricing is trending downward heading into next week, and quality remains strong. However, white asparagus volume out of Peru is beginning to decline due to seasonal shifts and ongoing field transitions. This is the last week for White Asparagus, a Guatemalan product. After that, we'll enter a supply gap until July. Once Michigan begins harvesting, we'll have Purple Asparagus available as a unique alternative during the transition.

Bok Choy: EXTREME 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: Quality and supplies are good.

Brussels Sprouts: EXTREME Quality and supplies are an issue with the majority of growers right now. The industry supply has dropped significantly. You can expect to see shortages and for the market to rise. Growers are trying to cover 10-week averages. Seeder and sizing lean towards medium and smalls. Jumbos are very limited. The market is at an extreme level.

Carrots: (JUMBOS, MEDIUMS and CELLOS) The Desert growing regions have started with good supplies and very good quality. Expect steady supplies through the end of the desert season which will run into late April or early May.

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. Mexico is just about done for the season. Domestic quality is good.

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

Garlic: California Garlic is showing very good quality with lighter supplies. Demand is good.

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): ESCALATED 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: WATCHLIST 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: Snow pea volume out of Guatemala remains low due to adverse weather, and sugar snap supplies are also declining for the same reason. These limited volumes are expected to persist for the next 2–3 weeks. Peru is anticipated to begin shipping both snow and sugar snap peas within that same timeframe. In Mexico, production of both snow peas and sugar snaps continues at a steady pace.

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: Florida has peaked on production of rounds and Romas and will gradually decrease over the coming weeks. Spot markets were higher this week. Quality is outstanding.

Snacking Tomatoes (Cherry, Grape and Medley): Stable supply available and quality is outstanding.

California forecasted to start in early June.
Georgia forecasted to start in early June.

MEXICO

Round and Roma Tomatoes: Lighter volume and higher demand from the east have pushed markets higher this week in general but large sizes were very short. We are transitioning to summer regions in Jalisco, Sonora, and Baja and should stabilize the markets over the coming weeks. Quality is outstanding on new crop; Quality is questionable on the remaining 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.

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.

Kumquats: The domestic season has ended. While import options exist, they are limited and risky due to USDA restrictions and high rejection rates caused by perishability.

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 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. Anjous 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 anjous packed. When we start to pack Anjous – I will share pics of 3rd grade, this will be your value pear. Anjous to start the week of September 16th, and if growers make it through June I will be surprised. Red Anjous are down 7% or 47,000 boxes, so it is nothing dramatic like the others. The question on Red Anjous 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.

DAIRY:

My take-away from the ADPI conference is that the industry generally expects range-bound U.S. prices. Production is good, domestic demand is soft, but exports might be enough to keep the market balanced. Europe is feeling a little softer with milk production seasonally high and YoY growth improving, but it might also be due to a general quiet market with holidays the past 3 weeks. GDT Pulse was stronger again, Supply is seasonally tight, but it's worth noting that Chinese demand has been better than expected this year and GDT/NZ dairy prices have been stronger than forecast the past two months.

SHELL EGGS:

National FOB shell egg weighted average prices are steady to higher. The undertone is steady. Demand remains light to moderate. Offerings are light. Supplies are light to moderate. Market activity is moderate. California weighted average delivered prices are steady to lower and lightly tested. The undertone is weak. Demand ranges light to at times fairly good. Offerings are light. Supplies are moderate. Market activity is slow to moderate.

BEEF:

Futures are seeing life of contact highs across the board. The live cattle trade is expected to be $2/CWT-$3/CWT higher this week. If that occurs that would be up $15 over the last 3 weeks. 559k-565k is the expected harvest this week. Many analyst see reduced harvests continuing at least through May. Cattle remain about 20 pounds heavier YOY. Boxed beef prices have been slow to follow the surge in cattle costs, as buyers proceed with caution and remain wary of consumer demand at such elevated price levels.

Heifer Retention?

The latest cattle on feed report showed heifers making up a smaller percentage of cattle on feed. In April heifers made up 37.6% of cattle on feed. The 3 year average is 39.3%. Analysts are seeing this as an indication that producers are beginning to hold back heifers for herd rebuilding.

PORK:

Retailers are featuring Bork(beef/pork blend) more often to combat the high price of hamburger. It'll be interesting to see how much traction this gets in the months ahead . At a recent NPB meeting ground pork was a focal point and to that end, ground pork is becoming more common in retail sets. As for this week, hogs are firm and expected to trade moderately higher this week. Butt prices should increase, loins have steady call, ribs have more upside potential. Hams and bellies are called steady for the week.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS - Prices are trending steady for WOGS and whole fryers. Supplies are moderate. Demand is moderate approaching the Mother's Day weekend. Floor stocks are sufficient. Market activity is mostly moderate. In the parts sector, prices are trending firm for tenders; steady to firm for b/s breast, fronts, bone-in breast and dark meat cuts. Wings are steady to weak with small sized wings in the better position. Supplies of tenders are tight to instances short of trade needs; light to moderate for bone-in breasts, b/s breast, fronts and dark meat cuts. Wings are moderate to available. Demand is moderate to good. Market activity is moderate to active.

EXPORT MARKET HIGHLIGHTS - Export demand is moderate.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - The market on frozen 8-16 lb. hens and 16-24 lb. toms is steady with a steady to firm undertone. 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 106.00-118.00 and 16-24 lb. toms 106.00-119.00 cents FOB for current deliveries. No trading reported. The market on tom breast meat and destrapped tenderloins is steady to firm. Demand moderate to good. Offerings light at best. The market on white trims is steady to firm, mostly steady. Demand moderate. Offerings short to light. Further processed demand moderate to good. The consumer sized breast market is steady to instances 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 at least steady. Demand light to moderate. Offerings light. Mechanically separated turkey (MST) is steady to firm with higher trending prices noted. Demand moderate to good. Offerings short to light. Trading slow to moderate centering on white meat.

EXPORT MARKET HIGHLIGHTS - Trading slow. Market steady to firm. Some price resistance is starting to be noted on the higher trending offering prices. Demand moderate to good. Offerings short to light.