Fresh Is Everything

Weekly Market Review
June 13, 2025

Overview

We are going to be fighting some weather here in the southeast but don't see any major delays on the horizon. In Nogales and McAllen, volume is steady on **tomatoes**; most other veg will slowly scale back for the summer and move to regional locations. Jalisco and Baja Monterey will take on a majority of the Mexican volume on Tomatoes. Quality is very good out of Mexico; Georgia, North and South Carolina quality is good as they ramp up for their season. We are still seeing some late production out of Florida but that should wrap up soon. In the west tomatoes out of the desert and central valley will of Coachella and Central Valley started this week; volume should ramp up next week.

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**. **Jalapenos** were tight this week.

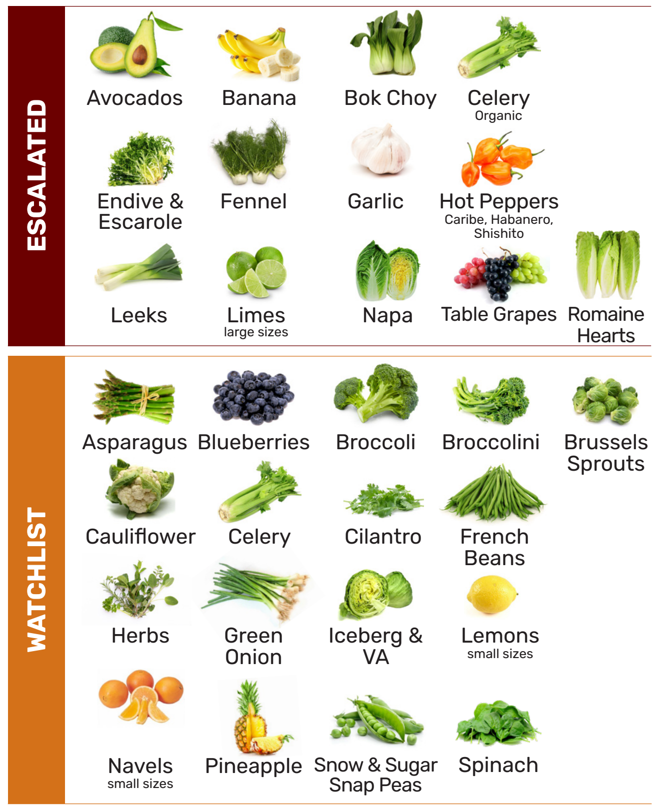
The offshore **Table Grape** season is mostly done and transitioned to Mexico; quality is fair at best due a mix of unseasonable weather events over the past week. Heavy rain and wind combined with early heat has impacted some of the crop; we are assessing this and will update as soon as possible.

Melons are now in full swing out of the desert; quality is very good. **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/ Nectarines**, Red/ Black **Plums** and **Apricots**, there are also Peaches available in the east out of Georgia and South Carolina. **Cherries** out of Washington State.

Avocado supply remains generally steady, while demand is increasing as we move into the second half of June. As a result, the market is beginning to firm, with prices trending higher on medium and large fruit. The industry is nearing the end of the Mexican season, where fruit is showing elevated dry matter levels and a notable share of Grade 2s. Attention is shifting to the upcoming Flor Loca crop, expected to begin in the coming weeks—a transition period that historically brings volatility in both supply and pricing. California production is lighter this week, as growers prepare for anticipated demand increases later in the month. Peru continues to play a key role in the industry, with active summer programs across the U.S. Notably, Peru surpassed California in weekly volume, and both origins are expected to be major contributors through the next few months. Overall asparagus supplies are expected to decline in the coming weeks, with sizing trending smaller due to weather-related challenges in both Mexico and Michigan. Additionally, Peru is entering its winter season, a period when production typically slows, contributing to reduced global availability. Looking ahead, Peruvian supplies are projected to begin increasing in August, with peak volumes expected from the Ica region—Peru's key southern growing area—during October and November, continuing through January. The Ica region consistently produces a high proportion of standard, large, XL, and jumbo sizes, supporting robust market availability during the fall and early winter months.

MARKET ALERT



Salinas had a minor heat wave early this week, but temperatures will get cooler and closer to normal as the week wraps up. Next week the temperature is expected to be slightly above normal, and it looks like we may see a warming trend on the horizon. We will keep a close eye on the temperature and send out any necessary updates but at the moment, the weather is pretty close to normal for this time of year. With those normal temps we will likely see the insects getting active. Insect pressure 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 steady. No recent reports of INSV. The **Romaine Hearts** market has been on the rise, and we do have a few growers that have escalated pricing on the 48ct. Demand has increased and seems to be driving the market.

Broccoli still has good quality and supplies, but **Cauliflower** is getting light with some growers. Most of the growers still seem to have good supply, but there are a few that are struggling a bit. **Brussels Sprouts** have improved. The market is no longer escalated but we could see supplies tighten up again. Some growers are losing yields due to quality. This is a tough time of year as Mexico is very hot, and some growers are winding down in Oxnard, so supplies are light. Salinas will start up in a few weeks for those growers so supplies will improve at that time but until then, we may see supplies tighten up again. **Bok Choy, Napa, Endive, Escarole, Fennel** and **Leeks** remain escalated, but supplies are improving, and the market is trending down. Overall production in Salinas is still steady.

FRUITS & VEGETABLES

Avocados: ESCALATED The U.S. avocado industry closed last week at 60.9M pounds, marking a 12% increase in volume from the previous week. Peru led the increase with a 26% week-over-week gain, and strong volumes are expected to continue from Peru, California, and Colombia through August. Mexico maintains sufficient old crop inventory to bridge supply into the start of the Loca harvest, which is expected in a few weeks. Market conditions remain stable, with pricing largely unchanged across most sizes, aside from a slight decrease on 36ct fruit. Smaller sizes may see upward pressure, as Mexico's size curve continues to shift. Larger 48ct volumes are up nearly 25% compared to a month ago, while 60ct and smaller are trending down. This is expected to be a short-term trend. Mexico's Main Crop is now estimated at 37% dry matter, with approximately three weeks remaining in the 2024–2025 season. The 2025 Peruvian season is progressing steadily, with over 300,000 metric tons shipped globally to date. U.S. programs are well underway, with promotional volumes available on larger fruit, and are expected to continue through the summer. ProHass projects a total Peruvian volume of 658,210 metric tons for 2025. In California, approximately 12.2 million pounds were harvested in Week 23, with dry matter averaging 27.5% and sizing peaking on 48s and 60s. The California Avocado Commission has revised its crop estimate downward from 375 million pounds to 340 million pounds, with fruit expected to remain available through the summer, tapering off in July. Colombia's Traviesa crop remains active, with strong availability on medium and small sizes. Dry matter continues to improve, and with larger fruit dominating the Peruvian supply, the industry anticipates a promotional window for medium and small fruit during the summer months.

Pineapples: WATCHLIST Pineapples will remain tight for some time due to low production in Central America. 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: ESCALATED The table grape market remains exceptionally strong as offshore supply winds down and Mexico's season begins under challenging conditions. Recent severe weather—including heavy winds, rain, and early heat in both Caborca and Hermosillo—has significantly impacted the crop. As a result, we anticipate quality concerns, particularly with all green varieties, and estimate crop losses could exceed 2 million boxes. Given the current outlook, we recommend substituting red varieties where possible over the next two weeks. The supply chain will likely experience some volatility during the next 10 to 14 days as we rely on fruit from Mexico and Coachella. We expect some relief with early Valley fruit from Arvin becoming available the week of June 23. Looking ahead, as we transition into California's season, we anticipate more stable volumes—barring any unexpected disruptions to the crop.

BERRIES

Strawberries: After a picture-perfect weekend with highs in the mid-to-upper 70s in Santa Maria, a marine layer has returned to the valley, bringing overnight cooling and damp, overcast conditions. These clouds typically clear by mid-morning, allowing for partial sunshine and daytime highs in the mid to upper 60s, with lows in the low to mid 50s. This pattern, along with breezy afternoons, is expected to persist through the week, providing favorable conditions for fruit development. Remaining conventional acreage in fresh production is performing well, with fruit showing strong color, good shape, and counts mostly in the 18–22 range. While some culling continues due to overripe, soft, or decayed berries, flower and fruit sets appear clean and promising. Certain blocks have transitioned fully to freezer production, where yields and quality remain strong. Organic production remains fully fresh, with solid sizing and surface appearance, though some bruising is showing up deeper in the packs; crews are actively removing compromised fruit to maintain quality. Harvest scheduling remains weather-dependent, with second passes expected to improve consistency. Most conventional acreage is now moving toward cannery use due to pricing and fruit condition, with plans to maintain fresh volume through mid-June where possible. In Watsonville and Salinas, consistent weather in the mid-60s with slightly warmer, more humid nights is supporting good firmness and strong fruit quality, with only minor issues such as crooked shapes and light bruising noted. Organic production appears to be peaking, while conventional volume continues to build, supported by strong field conditions and healthy fruit sets. Production is expected to rise through the end of June and possibly into the first week of July.

BERRIES - CONTINUED

Blackberries: In central Mexico, daytime temperatures are holding steady in the mid-80s to low 90s, with rising humidity and scattered, localized thunderstorms in the forecast. While some areas remain dry, others are experiencing intermittent rain, which may impact estimates slightly next week. Quality remains good overall, with berries showing strong sheen, mostly black color, medium to large sizing, and good firmness. However, some fruit is exhibiting red cell regression, attached calyx, and occasional soft or leaking berries due to the high heat. Blackberry volume is consistent, with peak production expected to continue for a few more weeks before tapering off toward the end of June. Despite potential rain impacts, volume is expected to stay relatively steady through the rest of the year, with a brief dip in July to be offset by Watsonville production. Organic volume in Mexico is winding down and is expected to remain limited until the season ends in July. In Watsonville, conditions have been cool but mild, with highs in the 60s and lows in the 40s to 50s. Conventional production is ramping up quickly with recent warmer weather, and quality has been excellent—large, juicy berries with strong early season performance. While current output is still limited to a few pallets on select days, full load volumes are anticipated to begin in June and steadily improve through September. Organic production has also begun in Watsonville with initial light harvests. In the Central Valley, warm weather continues with highs in the 80s to 90s and overnight lows in the upper 50s to 60s. A potential heatwave in the coming weeks could affect production, though volume is expected to begin mid-June and run through the end of July.

Blueberries: **WATCHLIST** In central Mexico, daytime temperatures are ranging from the mid-80s to low 90s, with scattered rain and isolated thunderstorms in the forecast. These weather events remain highly localized, and rising humidity is contributing to heat-related quality concerns. Conventional volume in Mexico is trending down week over week, with the season expected to wrap up by July, while organic production is scheduled to resume in August. Quality remains good with solid flavor, bloom, and appearance, though some redberries, soft or leaking fruit, and shriveling are being reported due to heat. Florida has been hot, humid, and rainy, with production nearing the end of its cycle and quality rated as fair following recent cleanup efforts post-rain. In Georgia, most growers have transitioned to processing fruit for freezer use, ending the fresh market season earlier than anticipated; remaining fruit has been soft but retains good bloom. The Central Valley continues to see hot days in the 80s to 90s and mild nights, with peak conventional and organic production now underway. While organic output may be approaching post-peak levels, both categories are showing excellent quality with good size, bloom, and flavor. Production in this region is expected to taper off in early July. In the Pacific Northwest, weather has been favorable with highs in the 70s and 80s, and Oregon's conventional and organic production is expected to begin within the next two weeks. Washington organic production is likely to start slightly ahead of Oregon's, with British Columbia and Washington's broader programs scheduled to begin in early July. Initial plant sets across the Northwest are looking strong, indicating promising early-season quality.

Raspberries: In central Mexico, daytime temperatures are currently ranging from the mid-80s to low 90s, with elevated but stable conditions expected to continue. The region is experiencing scattered rain and isolated thunderstorms, though these weather events are highly localized—some areas remain dry while others see intermittent showers. Rising humidity and recent cooler weather have contributed positively to overall fruit quality. The fruit is showing strong red color with good size and firmness, primarily medium-sized berries with occasional larger ones. Some issues with over ripeness, uneven ripening, and crumbled fruit have been observed due to heat, but crews are actively working to exclude affected product from the packs. Volume has been strong, with peak production expected in late June, and so far, rainfall has not caused significant damage. Organic volume from central Mexico has been limited but consistent. Meanwhile, in the Watsonville region, weather has been cool and mild, with highs in the 60s and lows in the 40s to 50s. Conventional production remains light this week, and volume is expected to stay limited until the end of June. Despite lower yields, quality has been promising, with berries showing good red color and size. However, there will be no organic volume from Watsonville this season.

CITRUS

Oranges: WATCHLIST ON SMALL SIZE NAVELS Quality on Navels remains very good with good demand as the end of the season for Navels is approaching. Small sizes remain short in supply and will be light in volume for the balance of the Navel season. Pricing on 88's and smaller continues to strengthen as the size structure is now trending heavier to larger sizes with the crop finishing in late June or early July. Ample lead time will be necessary to place orders, especially on small sizes, with many shippers now holding to averages. Valencia season has started. Early projections are for overall volume on the Valencia crop to be lighter this year, with the early fruit being smaller in size with larger sizes increasing as we move through the summer months.

Lemons: WATCHLIST ON SMALL SIZES We continue to see very good quality out of California with most shippers. Small sizes will continue to be short for the next several weeks, while 140's and larger will be in good supply. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Limes: ESCALATED ON LARGE SIZES We are starting to see supplies improve slightly on large sizes (110's, 150's and 175's) with good supplies on smaller-sized limes (200's, 230's and 250's). The market is steady on large sizes, but we are seeing lower on small sizes. Quality is improving.

Imports/Specialties: Blood Oranges will be finishing for the season in the next few weeks. Sizing is running small. Grapefruit is available with light supplies on Fancy grade; choice grade is available. Cara's, Minneolas and Mandarins are all but finished for the season.

WEST COAST LETTUCE

Iceberg: WATCHLIST Lettuce supplies and quality look good.

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.

Green and Red Leaf: Quality and supplies look good.

Romaine WATCHLIST, Romaine Hearts: ESCALATED
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, and Romaine Hearts are now escalated.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Season is done in Nogales and shifting to McAllen. Locally, South Georgia is now in full swing; Coachella also has good volume. Quality is good in all markets.

Color Bell Pepper: Good supply available in McAllen as well as crossing from Baja. Coachella is scratching this week and the volume out of Canada is steady on 11# all sizes. South Georgia should ramp up production on reds over the next week. Quality is good in all shipping points.

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. Fresno started picking some Poblano and Jalapeno this week and South Georgia should start over the next 7 to 10 days.

Eggplant: Domestic supply is ramping up out of the desert, and quality is outstanding. South Georgia expected to scratch next week.

Slicer Cucumbers: Stable supply crossing through Otay, Nogales and McAllen. Florida is done and we have completely transitioned to South Georgia. Quality is very good in all shipping points.

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

Pickles: Stable supply expected over the coming weeks out of South Georgia.

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 out of Guatemala has slowed due to a lack of rainfall and ongoing shipping delays. In contrast, Mexico continues to offer a strong supply of French beans, helping to support overall availability.

Zucchini/Yellow Squash: Good volume available in South Georgia. In the west we now in Full production out of Fresno and Baja with some lingering production out of Sonora. Quality is good.

HERBS

WATCHLIST In the East, basil quality continues to be impacted by rain in Colombia, while dill supply and quality have declined due to weather in Florida. Imported chervil is extremely limited, with near non-existent availability as weather challenges persist in Ecuador. In the West, basil supply and quality remain strong, and overall herb availability is steady, with the exception of chervil, which continues to face limitations due to weather-related disruptions.

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

Excellent supply and quality out of the desert on cantaloupe and honeydew. Watermelons are also in good supply.

Cantaloupe: Yuma is now in full swing and sizing will improve as we start to see a more typical pattern of 9s followed by 12s. Field reports show excellent quality from the desert. Fruit quality is outstanding, seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Good supply on Athenas out of South Georgia.

Watermelon: Watermelon volume is very good out of Mexico, Georgia and Florida; growers are making dealing on all sizes. Quality is outstanding.

Honeydew: Honeydew production has started off strong and is coming in with an excellent mix of 5s and 6s. The domestic dews are mostly clean with occasional scarring showing which is common in the desert due to higher winds in the region throughout the growing cycle. Brix levels on the dews are mostly in the 13-15% range.

MIXED VEGETABLES

Artichokes: Supplies and Quality are both good.
Asparagus: **WATCHLIST** Baja production has started to increase. Peruvian volume remains unchanged. Michigan continues with cooler weather which has affected production and sizing. Markets are slightly lower with more volume from Baja.
Bok Choy: **ESCALATED** Quality is good but supplies are still limited. The light supplies are driving the market.
Broccoli/Broccoli Crowns: **WATCHLIST** Quality and supplies are good with the majority of the suppliers.
Broccolini and Sweet Baby Broccoli: **WATCHLIST** Quality and supplies are good.
Brussels Sprouts: **WATCHLIST** Supplies have improved, but we expect to see them tighten up a bit. Things should improve as we get into Mid July.
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: **WATCHLIST** Quality is good, but supplies are light with some growers.
Celery: **WATCHLIST** Quality is good, but supplies are light with some growers. Sizing has shifted towards 30/36ct. Some growers will transition to Salinas in June and that will also cause supplies to tighten up. The Organic Market is still increased.
Corn, Sweet: Excellent supply out of Georgia and Florida. In the west, the desert and Brawley are done and should transition this week to Central Cal. Seeing a split market with higher prices in the west. Quality is good in all locations.
Fennel: **ESCALATED** 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: **ESCALATED** The 2024-2025 California Garlic season is ending 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. Growers are currently supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality remains good although available supplies will be decreasing, "PRICING WILL BE ESCALATED"!
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: Quality and supplies are good.
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: **WATCHLIST** Production of snow peas and sugar snaps out of Guatemala has declined, driven by a lack of rainfall in the growing regions. Additionally, humidity is contributing to potential quality issues. In Mexico, sugar snap production remains steady, while snow pea supply is limited due to ongoing field transitions.

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: Light volume out of Palmetto, Wimauma and Wachala will continue to decrease over the coming week or so and transition to Bainbridge and parts of South Carolina. We may see some volatility over the coming weeks but barring any major weather events due to these transitions. Current quality will be mixed. Tennessee expected to scratch mid to late June.

Snacking Tomatoes (Cherry, Grape and Medley): Lighter supply available due to the rain, quality remains good.

California started this week.

MEXICO

Round Tomatoes: Plenty of new crop production available out of Jalisoc, 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.

OTHER FRUIT:

Apples: Red Delicious apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October. **Honeycrisp** is experiencing tight supply across all sizes and grades; most USXF/WAXF #2 fruit has finished for the season. The market continues to strengthen, and a short gap is anticipated before new crop availability resumes in August. **Granny Smith** apples are in good supply across all sizes and grades, with steady markets expected to continue until the early September harvest. On the organic side, Gala, Fuji, Pink Lady, and Granny Smith apples are available in very limited volumes across most sizes and grades, while Honeycrisp is mostly finished until the new crop returns in August.

Pears: D'Anjou availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August. **Red D'Anjou** pears are moderately available in US #1 35–55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited availability.

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

Cherries: Season is done and has transitioned to Washington.

Stone Fruit: New crop Peaches, Nectarines, Plums 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.

DAIRY:

The U.S. market ran out of steam this week after rallying hard for the past month. U.S. milk production still sounds like it is strong so the price strength has mostly been attributed to ex-ports and end users putting on coverage for the second half of the year. However, the April export data was disappointing. I'm still plugging in strong exports for May/ June, but the weak exports do through some uncertainty into the story. EU prices were steady to higher in euro terms and up in USD terms. Good demand continues to keep the market tight. The big outlier has been NZ where futures are heavily backward dated and GDT prices mostly fell this week. Maybe NZ pricing is telling us that global demand is weaker than it feels sitting in the North?

SHELL EGGS:

National FOB shell egg weighted average prices are mixed. The undertone is steady to fully steady. Demand into retail channels is moderate to fairly good. Food service movement is mostly moderate. Offerings are light to instances moderate, while supplies are light to moderate. Market activity is moderate. California weighted average delivered prices are mixed, although lightly tested. The undertone is generally steady to instances fully steady. Retail demand ranges moderate to fairly good. Loose egg demand is light to moderate. Offerings are light to instances moderate. Supplies are moderate. Market activity is moderate.

BEEF:

The expected harvest this week is between 575,000 and 595,000 head. Any remaining Father's Day buying should continue to support middle meats, with loins and thin meats in particular being hard sold. Rounds are still finding strong grinding demand, leading to limited availability. Ribs are holding steady, and grinds remain well sold. Packer margins remain negative—around $100 per head.

Analysts note that most retail prices have yet to reflect the sharp rally in the beef market over the past couple of weeks. Once those price increases hit the meat case, consumers may experience substantial sticker shock. Combine that with the typical summer demand slowdown, and we may see some relief in both cattle and beef pricing in the weeks ahead. With that in mind, we are likely near a short-term top in cutout values and cattle prices.

That said, don't expect much downward pressure this week, as availability remains extremely tight. Drought concerns are mounting, and poor grazing conditions may push cattle into feed yards sooner than expected. Currently, the number of cattle on feed for 150 days or more is at its highest level on record and suggests heavier cattle weights will remain the norm for now. Eventually, these cattle will come to market—the question is when.

Futures are higher to start the week, and the call on cattle is steady.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS – Prices are trending steady for WOGS and whole fryers with three pound and smaller sizes in the better balance. Supplies are mostly moderate. Demand is moderate. Floor stocks are sufficient. Market activity is slow to moderate. In the parts sector, prices trend firm for tenders; steady to firm for wings and dark meat cuts; steady for fronts and bone-in breasts and weak for b/s breasts with heavy discounting noted, with jumbo and medium sizes in the longer position. Small sized wings are available. Supplies of tenders are tight; light to moderate for dark meat cuts and wings with legs, leg quarters and drums with improved export interest noted. Fronts and bone-in breast are moderate and b/s breasts ample for current needs. Demand ranged light to good, mostly moderate to good. Market activity is moderate to active.

EXPORT MARKET - Export demand is moderate.

PORK:

Steady to higher is the call on virtually all primals this week. Availability remains tight across the carcass following last week's short kill. Hams and boneless loins are seeing solid export interest, while butts are currently a popular item in retail ads. It's rib season, so ribs are expected to command stronger prices in the weeks ahead. I'd be very surprised if pork does not continue to see more attention in retail featuring this summer.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - The market on fresh and frozen 8-16 lb. hens and 16-24 lb. toms is steady to firm. Frozen Grade A 816 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 117.00-133.00 and 16-24 lb. toms 114.00-142.00 cents FOB for current deliveries. Trading slow. Frozen basted equivalent 8-16 lb. hens 123.00 and 16-24 lb. toms 114.00-119.00 cents fob current deliveries.

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. Demand moderate to good. 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 with a firm undertone. Demand light to moderate. Offerings light. 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 very light. Hearts, livers and defatted gizzards steady with spot strength noted on defatted gizzards. Demand and offerings light to moderate. Mechanically separated turkey 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. Offerings short to light.