

Overview

We are going to be fighting some weather here in the Southeast but don't see any major delays on the horizon. We are also watching a very active tropical pattern off the west coast of Mexico that will continue to bring cloudy weather and heavy rain and local flooding to the region over the next few days. This may impact harvest schedules and freight coming from Southern Mexico to the US Border.

Jalisco and Baja and Monterey will take on most of the Mexican volume on **Tomatoes**. Stronger demand on Romas will call for premiums across that category. Quality is very good out of Mexico. Georgia, North and South Carolina quality is good but will begin to wind down. Transition to North Carolina/Tennessee will start next week.

California production on Tomato and veg is strong; good production on Bells will transition to Arvin this week. **Slicer Cucumber** is good out of Georgia and Baja. Items that remain light in supply are **Tomatillo**, **Habanero** and **Jalapenos**. The Mexican Table Grape season will improve out of Mexico this week and we should see some additional domestic volume out of the desert, as well. Arvin is about 1 week out.

Melons are finishing up in the Desert and will transition to the Central Valley next week. Quality will continue to be 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 inventory levels have increased ahead of the 4th of July promotions, with strong availability across all sizes. Mexico is nearing the end of its season, offering high dry matter fruit with a large share of Grade 2s. The transition to the Flor Loca crop is expected by mid-July and may introduce some supply and pricing variability. The remaining old crop has good volume, especially on 48ct and larger, with promotional support in place. California production is tapering, though field prices remain firm due to steady demand. Peru continues to supply strong volumes through summer, with significantly more fruit in the market compared to last year, despite a lower crop estimate. Colombia's Traviesa crop remains active but will begin to decline as the season winds down by August. The price gap between large and small fruit is expected to narrow in the coming weeks.

Temperatures in Salinas are slightly above normal as we wrap up the week. The outlook shows that those slightly warmer temperatures will continue through next week. The weather has not been a huge factor for quality since we have settled into Salinas but with Q3 and the height of summer around the corner, we are expecting to see supply and quality issues arise. Insect pressure and INSV have been minimal so far, but it is still early in the season. Overall, supplies and quality are still okay but the markets on a few items have started to increase.

The **Lettuce** market shot up significantly over the past week. We are seeing some lighter weights and lower yields, but quality still remains good. We expect to see the market continue to rise with demand increasing. **Lettuce** and **VA Blends** are all escalated. Growers are doing their best to cover averages, but some outside labels are being used in order to fill orders at this time. The **Romaine** and **Romaine Hearts** market has continued to rise, and Romaine Blends and Hearts are all now escalated. Demand has increased and seems to be driving the market.

MARKET ALERT

ESCALATED					
	Avocados	Banana	Bok Choy	Broccoli Crowns	Cauliflower
					
	Celery Organic	Endive & Escarole	Fennel	Garlic	Hot Peppers Jalapeno, Tomatillo and Shishito
WATCHLIST					
	Leeks	Lettuce Iceberg, VA Blends	Limes large sizes	Napa	
					
	Romaine Hearts, VA Blends	Table Grapes	White Asparagus		
					
	Asparagus	Blueberries	Broccolini	Brussels Sprouts	Celery
					
	Cilantro	French Beans	Herbs	Green Onion	Lemons small sizes
					
	Navels small sizes	Pineapple	Snow and Sugar Snap Peas	Spinach	

Broccoli and **Cauliflower** supplies have gotten light with some growers. For Broccoli, the MX suppliers are extremely limited in supplies. While they expect supplies to get a little better next week, they do expect to have supply issues throughout the summer. Both Broccoli and **Cauliflower** are now escalated with the limited supply driving the market. Quality still seems to be good but there have been reports of increased insect pressure on both items. **Brussels Sprouts** supplies are getting tight 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 expected to be light for at least another week. Salinas will start up soon for some growers so supplies will improve at that time. Until then, supplies are light, and we will have growers holding to averages. **Bok Choy**, **Napa**, **Endive**, **Escarole**, **Fennel** and **Leeks** remain escalated. Overall production in Salinas is still steady.

FRUITS & VEGETABLES

Avocados: ESCALATED Markets across all sizes remain stable. U.S. avocado volumes closed at 63.3M pounds, holding steady with the previous week. Peru was the only country of origin (COO) to show a volume increase, with further growth expected through July, while other COOs remain stable. Small fruit and a high proportion of Grade 2s are still prominent in the field. The Main Crop (Hass) is averaging 37% dry matter, with ongoing rains likely to affect future harvests. California harvested 10.4M pounds, with fruit peaking on 60s and 48s and dry matter averaging 28%. The California Avocado Commission revised its crop projection to 340M pounds (down from 375M), but supply is expected through summer with strong eating quality. Colombia's Travesa crop remains active, particularly on medium and small sizes. As Peru supplies more large fruit, Colombian fruit may see increased market movement during the summer. Mexico's Flora Loca crop will begin harvests and should hit markets by mid-July.

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.

BERRIES

Strawberries: Supply and availability are expected to remain steady over the next few weeks. Quality is strong, the flavor is sweet, the color is full red, and the sizing is medium to large. This week in the valley, daytime highs averaged in the mid-60s, with morning lows in the low 50s. A persistent marine layer has kept mornings overcast before clearing to partly sunny afternoons with occasional breezes. These conditions have supported consistent production and overall quality. Conventional fields are producing clean, well-sized fruit. While some culling continues—mainly for softness and undersized berries—blocks transitioning to freezer production are reporting excellent yields and quality. Organic acreage remains 100% fresh, with similar size profiles. Occasional bruising or softness deeper in the pack is being managed by crews actively removing compromised fruit. Harvest scheduling continues to adjust to avoid overripe fruit, with second passes this week expected to improve consistency. Despite moving past peak,

Table Grapes: ESCALATED The table grape market remains strong on greens due to recent severe weather, including heavy winds, rain, and early heat in both Caborca and Hermosillo. We continue to see quality concerns, particularly with all green varieties, and estimate crop losses could exceed 2 million boxes. Given the current outlook, we continue to recommend subbing red varieties where possible over the next two weeks. Red markets have eased back some and there is significantly more volume on reds than green. Steady volume will continue out of Coachella and Arvin is expected to scratch next week. Looking ahead, as we transition into California's season, we anticipate more stable volume barring any unexpected disruptions to the crop.

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.

many blocks still show healthy flower and green fruit sets, with vigorous plant activity supporting continued fresh harvest through mid-June. Approximately 65–70% of conventional acreage has transitioned to cannery use, while the remaining acreage will stay fresh until the end of the month. Organic fields are on track to complete planting by early July. In Watsonville and Salinas, similar weather patterns—mid-60s daytime highs and low-50s nighttime lows—have supported strong fruit firmness and color development. While some bruising has been noted due to fast-paced harvesting, field teams are working to address this through improved management practices. These regions are currently in peak production, although not all varieties are aligned in their cycles; some have already peaked and are beginning to decline, while others are still ramping up

BERRIES - CONTINUED

Blackberries: Production is currently active across Central Mexico, Oxnard, Georgia, California, and Baja. Mexican production is steadily declining, while Georgia is at its peak. Oxnard remains consistent with stable output. Overall quality across all regions is strong, with fruit showing good size, color, firmness, and sheen. In Central Mexico, daytime temperatures range from the mid-80s to the low 90s. Scattered rain and isolated thunderstorms are forecasted, although conditions remain highly localized—some areas experience intermittent showers, while others remain dry. Humidity levels are rising, and while temperatures remain elevated, they are expected to stay below the low 90s. Fruit quality is generally good, characterized by medium to large size, firm texture, and predominantly black coloring. However, high heat has contributed to some issues, including red cell regression, attached calyx, and occasional soft or leaking fruit. Out of Georgia, blackberry volume is steady, with peak production expected to continue for a few more weeks before tapering off toward the end of June. Rain forecasted for next week may slightly impact output, but overall volume is expected to remain consistent through the rest of the year. A dip in July production is anticipated, which will be supplemented by increasing volume from Watsonville. The organic volume from Mexico is beginning to wind down and is expected to remain limited through July as the season concludes. In Watsonville, the weather has been mild and cool, with highs in the 60s and lows in the mid-40s to the mid-50s. Warmer conditions have helped conventional production begin to pick up. Quality has been excellent, with large, juicy fruit. Although current output is limited to a few pallets per couple of days, volume is expected to increase significantly starting in June, with strong availability anticipated through September. Organic production has also begun with initial scratch pickings and will remain limited for the next few weeks as it ramps up.

Blueberries: **WATCHLIST** Central Mexico is also still active, though winding down. Daytime temperatures range from the mid-80s to the low 90s, with scattered rain and isolated thunderstorms forecasted across the region. These patterns are highly localized; some areas remain dry, while others experience intermittent showers. Humidity is rising, and temperatures are expected to stay elevated but stable. Conventional volume is trending downward on a weekly basis, with the season projected to conclude by early July. Organic production is expected to resume in August. Quality remains good overall, with strong bloom, flavor, and appearance; however, some redberries have been noted to be soft or leaking,

and heat-related shriveling has been observed. In California's Central Valley, the weather has been hot, with highs in the 80s to 90s and overnight lows in the upper 50s to 60s. This warm trend is expected to continue into next week. Both conventional and organic production are at peak levels, although organic fields may be nearing a post-peak level. Fruit quality has been excellent, with strong bloom, good sizing, and great flavor. Production is expected to continue through the beginning of July, with good availability for both conventional and organic blueberries. In Georgia, production continues, and quality has remained consistent, but production is winding down. New Jersey is expected to begin harvest shortly, though recent rain has caused some delays. In the Pacific Northwest, Oregon's season is roughly six days away. A few days of triple-digit temperatures early in the crop have prompted close monitoring of fruit quality as harvest begins.

Raspberries: Watsonville raspberry crops are coming on strong and are expected to continue increasing over the next few weeks. The variety is performing well, with sweet, aromatic flavor, full red color, and good sizing. The weather in the region has been cool and mild, with highs in the 60s and lows in the mid-40s to the mid-50s. Conventional volume remains light for now but is expected to ramp up toward the end of June. Despite the lighter volume, quality has started off strong with clean, well-sized red berries. No organic volume is expected from this region for the season. In Central Mexico, daytime temperatures range from the mid-80s to the low 90s, with scattered rain and isolated thunderstorms forecasted. While some areas remain dry, others have seen intermittent showers. Humidity is increasing, but temperatures are expected to stay below the low 90s. Fruit quality is holding up well, with a strong red color, good firmness, and mostly medium-sized berries, with occasional larger ones. Some issues, such as overripe, uneven ripening, and crumbled fruit, are being observed due to the heat, but crews are actively managing pack quality. Volume has been steady, with a peak expected in late June. So far, rain has not caused significant damage, and recent cooler weather has helped improve overall fruit condition. Organic volume from this region continues to arrive in limited but consistent amounts.

CITRUS

Oranges: **WATCHLIST ON SMALL SIZE NAVELS**

Navel quality remains strong with solid demand as the season nears its end. Small sizes continue to be in short supply and are expected to remain limited throughout the season. Pricing on 88s and smaller is firming as the size profile shifts toward larger fruit. The Navel crop is expected to finish in late June or early July, and ample lead time is recommended for orders—particularly for small sizes—as many shippers are now holding to averages. Valencia season is underway and off to a strong start. The fruit's appearance is excellent, and the juice content is high. Sizing is peaking on 72s, 88s, and 113s. However, early estimates indicate a lighter overall crop volume this year. Initial harvests are yielding smaller fruit, with sizing expected to increase as the season progresses through the summer.

Lemons: **WATCHLIST ON SMALL SIZES** With rising temperatures, demand for fresh lemons is increasing. Harvest and packing are in full swing in District 2, and both size and grade curves are tracking as expected for the region.

WEST COAST LETTUCE

Iceberg: **ESCALATED** Lettuce quality looks good, but supplies have gotten tight. We are seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal so far. The market is now escalated. Recent harsh weather in MX has increased demand on the CA supply and is putting unexpected pressure on the Salinas region.

Iceberg VA: **WATCHLIST** Quality looks good, but supplies have tightened up.

Romaine VA: Quality and supplies are good, but we are keeping an eye on insect pressure and the weather.

Green and Red Leaf: Quality and supplies look good.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Good supply available in McAllen, South Georgia. Coachella will finish this week and should start transitioning to Arvin and Bakersfield early next week. Quality is good in all markets.

Color Bell Pepper: Good supply available in McAllen as well as crossing from Baja; Coachella will wrap up for the summer this weekend then start the transition to Bakerfield and Arvin. Canada remains steady on 11# all sizes. South Georgia should ramp up production on reds over the next week. Quality may be mixed this week due to heat in the South and The Desert.

Mini Sweet Pepper: Supply stable this week and quality is good.

Mixed Chili Pepper: 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.

The current size structure is trending toward 140s, 115s, 165s, and 96s. Promotable volumes are available on Choice grade fruit, particularly in 140s and larger. However, smaller sizes—165s and 200s—remain limited. 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.

Romaine, 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.

Slicer Cucumbers: Stable supply crossing through Olay and McAllen. Domestic supply out of Georgia is steady and the quality is outstanding at all points.

English Cucumbers: Good supply available this week. Quality is 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** The market remains active across most presentations, with potential vessel delays posing a risk to short term availability. Volume is expected to remain steady through next week. Overall quality is reported as good, and pricing remains generally unchanged.

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 Basil quality continues to be affected by rain in Colombia, while imported chervil remains extremely limited due to adverse weather in Ecuador. On the West Coast, the supply and quality of basil are strong. Supply on all other herbs is steady, with chervil being the notable exception due to ongoing weather-related challenges.

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, South Carolina 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 dewes 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 dewes are mostly in the 14-16% range.

MIXED VEGETABLES

Artichokes: Supplies and quality are both good.

Asparagus: **WATCHLIST** Domestic supplies remain limited as Michigan and Washington wind down their seasons. Washington has concluded reporting, while Michigan prices have trended upward. Despite this, the overall market is expected to remain steady, supported by consistent production from Mexico and Peru. White Asparagus is likely to experience a production gap that will persist through the end of July.

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

Broccoli/Broccoli Crowns: **ESCALATED** Quality is still good, but supplies have tightened up with the majority of the growers. Demand is increasing and insect pressure has been reported and is affecting yields. MX has had severe weather and increased insect pressure resulting in extreme shortages.

Broccolini and Sweet Baby Broccoli: **WATCHLIST** Quality and supplies are good.

Brussels Sprouts: **WATCHLIST** Supplies are getting tight again. Things should improve as we get into Mid July but until then, you can expect to see growers holding to averages and we may see pricing escalated again.

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: **ESCALATED** Quality is good, but supplies are light with some growers. We are also seeing insect pressure, a little discoloration and creamy color.

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.

ONIONS:

The onion market is not expected to see significant movement during Q3. Ample supply from California and New Mexico is anticipated to carry through the first half of the quarter, while the Northwest is projected to have a strong crop this season. The latter half of Q3 will largely be a "harvest market," meaning onions will need to ship fresh and cannot be stored, regardless of market conditions. Looking ahead, the long-term outlook for

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** Guatemalan production remains light due to ongoing heat stress. However, relief has come from Peruvian imports and domestic supply. Prices have increased as a result, and quality remains variable across regions.

the Northwest is less favorable going into next year, despite expectations for similar or increased acreage compared to last season. Barring any major weather disruptions, the industry should have more than enough supply to meet and exceed demand across all colors and sizes for the remainder of the calendar year.

POTATOES:

While the market has remained relatively flat for most of the calendar year, we're now beginning to see supply tighten and prices inch upward. The first half of Q3 is expected to be tighter than we've seen in some time, with current supply constraints primarily affecting larger-size cartons (40ct through 70ct). However, as we approach the end of the storage season, availability across all sizes and grades is expected to become more limited.

The second half of Q3 will transition into new crop Norkotahs, ushering in typical "harvest market" conditions. Pricing is anticipated to begin slightly higher than where storage crop Burbanks will finish but should gradually decline as harvest volumes ramp up. Acreage in Idaho is expected to be similar to last year, and assuming no major disruptions, we can anticipate a market similar in tone and behavior to the previous season.

TOMATOES:

EAST COAST

Round and Roma Tomatoes: The season will be winding down out of Georgia and South Carolina this week and start the transition to Tennessee and North 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 due to weather.

Snacking Tomatoes (Cherry, Grape and Medley):

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

California: Volume ramping up out of the valley and should continue to improve over the coming weeks. Quality is good.

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.

DAIRY:

SGX/Oceania was bearish this week with WMP and SMP falling more than 3% at the Pulse auction. The U.S. market was weaker as well with cheese down and butter range bound and powders down slightly. EU was mostly steady, but SMP is feeling some downward pressure from the stronger USD. At the Eurolait conference in Copenhagen this week the mood has been relatively supportive for EU butter, cheese and high protein powders while no one seems real bullish on SMP. There hasn't been much Bluetongue circulating, but warmer and wetter weather could still bring it back. I'm watching Oceania market closely. How much of this price weakness is seasonal versus weak demand??

MEXICO

Round Tomatoes: Production was down slightly due to clouds and rain out of Jalisco but should improve once the weather clears. Baja volume remains steady, overall demand stays light this week on rounds despite seeing excellent quality.

Roma Tomatoes and Snacking Tomatoes (Cherry, Grape, Medley):

Production was down this week in Jalisco and San Luis Potosi due to weather and demand was higher this week on the National Market as well as here domestically. Pricing was a bit higher this week on the spot but expected to fall back by the middle of next week. Quality remains good.

Snacking Tomatoes (Cherry, Grape and 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.

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.

SHELL EGGS:

National FOB shell egg weighted average prices are steady to lower for caged graded loose eggs. The undertone is steady to barely steady with some noting caution. Retail and food service demand is moderate to at times fairly good. Offerings are light to moderate. Supplies are moderate to instances light. Market activity is moderate. California weighted average delivered prices are steady to higher with only cage free white graded loose Large most tested. The undertone is steady to firm. Demand ranges light to fairly good, generally moderate to fairly good. Offerings are light. Supplies are light to moderate. Market activity is moderate.

BEEF:

What goes up must come down – sort of. With boxed beef availability still very tight, sharp declines are not expected. The current outlook calls for an orderly decline in steak items (middle meats), while end cuts and grinds are expected to remain steady to slightly higher. Top butts continue to have their moment in the spotlight, with tight supplies and firming prices. This week's harvest is projected at 560,000 to 565,000 head. Beef packer margins are negative \$25 per head range. Beef and Pork plants are still dealing with worker absenteeism due to illegal immigration concerns which is one of many factors affecting production. Futures are up and down this week and expectations are for cattle to trade steady to lower.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS – Prices are trending steady for WOGS and whole fryers. Supplies are moderate to heavy with 3 pound and heavier sizes noted as slightly more available. Demand is light to moderate. Floor stocks are sufficient. Market activity is light to moderate. In the parts sector, prices continue to trend firm for tenders; steady to firm for wings and dark meat cuts; steady at best for fronts and bone-in breasts and weak for b/s breasts with some discounting noted. Supplies of tenders are tight for current needs; light to moderate for dark meat cuts and wings with legs, leg quarters thighs and drums well cleared. Fronts and bone-in breast are moderate to heavy and b/s breasts are noted as ample and slow in clearing. Demand is moderate to good. Market activity is moderate to active.

EXPORT MARKET – Export demand is moderate.

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 130.00-141.00 and 16-24 lb. toms 130.00-144.00 cents FOB for current deliveries. Trading slow. Frozen basted equivalent 8-16 lb. hens and 16-24 lb. toms 136.00 cents FOB for current shipments.

The market on tom breast meat and destrapped tenderloins is firm. Demand moderate to good. Offerings short to light. 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 with a firm undertone. 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 light. Hearts steady to weak, livers and defatted gizzards steady. Demand and offerings light to moderate. Mechanically separated turkey is steady to firm. Demand moderate to good. Offerings short to light. Trading slow.

PORK:

Hog weights are falling seasonally, helping to curtail production and lending a firm tone to the overall market. It's peak season for hams and bellies, and market tightness is being exacerbated by historically low pork inventories in cold storage. Meanwhile, summer weather across the nation is fueling strong grilling demand. Hogs are expected to steady to higher this week. Little downward movement is expected on any of the primals this week.

EXPORT MARKET HIGHLIGHTS – No trading reported. Market steady to firm. Demand moderate. Offerings short to light.



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