

Overview
































Post Suspension agreement demand is mixed on the entire **Tomato** category going into the weekend. There is a lot of uncertainty on the cost impacts since the termination of the agreement, at both retail and foodservice. **Grape Tomatoes** remain very short this week, large rounds were tighter this week while smaller sizes seemed steadily available. **Romas** were steady as well. Quality across the entire category out of Mexico is excellent while domestic fruit was fair out of North Carolina and Tennessee. California production on Tomato is strong; production on mixed dry veg will be challenging this week on both coasts due to transition.

The tightest items are **Green and Color Bell Pepper, Tomatillo, Habanero**, and **Jalapenos**. The Mexican **Table Grape** season is just about done for the year and transitioning to the Central Valley. Quality is excellent on Domestic Grapes, and we should see steady supply now through late October. **Melon** supply out of Firebaugh is steady and quality is outstanding. **Banana** and **Pineapple** availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes. 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 and **Cherries** out of Washington State.

Mexico's **avocado** size curve remains misaligned with current market demand. In a landscape where 60ct fruit has become the new standard, sizing up remains a challenge for many Mexican programs. Despite this, ample rainfall over the past year is expected to support continued availability of larger sizes through Q4. The influx of large fruit from Peru has helped reintroduce consumers to larger sizes, easing the transition for Mexico's programs toward offering bigger sizes. On the foodservice side, the rise of the Loca crop in Mexico's supply mix has tightened availability of #2 fruit. As an off-bloom and smaller crop, Loca is producing cleaner fruit, resulting in lower percentages of #2s through August. We will see a noticeable shift in dry matter content and ripening behavior. The oil content difference between the two crops is 37% for Negra and 24-25% for Loca. This marks the sharpest annual drop in Mexican avocado oil levels. Overall industry supply remains strong, supporting high demand as summer promotions continue across sourcing regions. Pricing on larger fruit is stable, while tighter supplies of small and medium sizes are driving upward price pressure. Mexico's transition to the Flor Loca crop is underway, offering a balanced size curve with solid volumes across all sizes. California production remains steady, although small fruit is limited. Peru continues to deliver consistent imports with strong availability of large and jumbo sizes. Current conditions offer a strong promotional window leading up to National Avocado Day on July 31.

Temperatures in Salinas have gotten back to normal for this time of year. Warmer weather did roll in, so it is starting to help with plant growth. We will see slightly above average temperatures through the middle of next week. These higher temperatures have also brought along the warm weather challenges. We have seen supply and quality issues arise. Insect pressure, specifically the diamondback moth, and INSV have been reported in the fields. Supplies have really tightened up on quite a few items. The **Lettuce** market is still at the extreme level. We are still seeing lighter weights and lower yields, but quality remains good. Both Lettuce and **VA Blends** are all still escalated to the extreme level. Growers are doing their best to cover averages, but some outside labels are being used to fill orders at this time. You can still expect to see prorates on Lettuce and VA Blends until supplies are ample again. The **Romaine** and **Romaine Hearts** market has also stayed escalated. Demand and lower yields are driving the market.

MARKET ALERT

EXTREME	 Bell Peppers all colors	 Brussels Sprouts	 Green Beans	 Lettuce Iceberg VA Blends	
ESCALATED	 Avocados	 Bok Choy	 Broccoli crowns, asian cut, organic, florets	 Cauliflower	 Endive & Escarole
	 Fennel Anise	 Garlic	 Hot Peppers Jalapeno, Tomatillo Poblano & Shishito	 Leeks	 Limes large sizes
	 Napa	 Romaine Hearts, VA Blends	 Sweet Corn	 Tomatoes Grape	 White Asparagus
WATCHLIST	 Asparagus	 Broccolini	 Cilantro	 French Beans	
	 Herbs	 Green Onion	 Lemons small sizes	 Navels small sizes	
	 Pineapple	 Snow and Sugar Snap Peas	 Spinach	 Spring Mix	

Broccoli and **Cauliflower** supplies are also very light with the majority of growers. For Broccoli, the MX suppliers are extremely limited in supplies. Some growers do not have any supplies at all. MX does expect supplies to get a little better, but they do expect to have supply issues throughout the summer. Both Broccoli and Cauliflower remain escalated with the limited supplies driving the market. Broccoli is very tight across the industry. Quality still seems to be good but there have been reports of increased insect pressure on both items.

Brussels Sprouts supplies are extremely 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 a bit longer. Salinas has started up for some growers so supplies should start to improve but for now, the market is at the extreme level. Growers are holding to 10-week averages when they can, but some growers have starting prorating. That should be short term, and we will keep everyone updated on any new information we receive.

Bok Choy, Napa, Endive, Escarole, Fennel and **Leeks** remain escalated. With Valencia season underway and off to a strong start, the fruit's appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. 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.

Overview – continued

Weekly Market Review
July 18, 2025

As the summer progresses, volumes are expected to continue to decline as we move into August. District 2's season is anticipated to conclude around mid-September. Weather conditions remain favorable. 140/165/200 ct **Lemons** are looking extremely tight. Medium-to-large choice Lemons are more readily available as of now. Fancy grade percentage is down this season due to high wind events, which has impacted fruit quality. Domestic supplies are tightening quickly. On the import front, availability is also limited. Argentina is still heavily shipping fruit to European markets and to Russia. So far, they have shipped 4.5 million cases to Europe which is 71% increase of the whole volume they shipped to Europe in 2024. Peak sizes are ranging between 95s, 115s, 140s, quality is better than last year but ranges depending on the supplier. We continue to anticipate Argentina to ship fruit till the middle of August into the US, they are roughly 70% through their crop.

FRUITS & VEGETABLES

Avocados: ESCALATED Last week avocado volumes closed at 64.2M pounds, a 3% increase from the previous week. Loca fruit is gradually entering the supply chain, improving availability on smaller sizes. The size curve continues to favor 48s, more so than in previous summers. The Main Crop is showing high dry matter around 37% and a large proportion of Grade 2s, while Off-Bloom fruit (Loca/Mendez) is in the mid-20s. APEAM has reaffirmed the 23% dry matter minimum for harvest. Peru's season is now about 75% complete, with over 470,000 metric tons shipped globally. All major U.S. programs are active, with strong volumes expected through summer. Southern Peru is now harvesting, delivering fruit with dry matter near 25% and good overall quality. California harvested 11.8M pounds in week 28. Dry matter is averaging 28%, and sizing remains focused on 48s and 60s. Volume has declined from the spring peak but is expected to hold steady through July, with gradual reductions in August. Fruit quality remains strong, and availability should continue into early fall. Colombia's Traviesa crop is in its final stages, offering primarily medium-sized fruit with dry matter ranging from 26 to 28% depending on region. Overall eating quality is strong, and volume is expected to continue through summer before transitioning to the Principle Crop in the fall.

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.

BERRIES

Strawberries: Production is beginning to slow across all growing regions, including Santa Maria, Salinas, and Watsonville, as the season moves beyond its peak. Supplies are gradually declining week over week, but availability remains steady for now. Volumes are expected to continue decreasing through July and August, with a rebound projected in the fall as Santa Maria and Oxnard ramp back up. Quality remains strong, although wet and foggy mornings have led to more reports of bruising and decay. QA teams are effectively sorting out sub-par fruit to maintain premium pack standards. The fruit is showing excellent color, is medium to large in size, and continues to have very good flavor.

Raspberries: Active production continues in Central Mexico, Baja Mexico, and Watsonville. The quality is excellent, with sweet, aromatic, full-red berries that are great. Supply and availability are steady.

Chile has shipped close to 1,000,000 boxes to the USA. Pack outs have been predominately 115s, 140s, and 165s, with approximately 70%-80% of the crop being Fancy. Overall volume is projected to increase by about 5% compared to last year, reaching an estimated 21-22 million boxes. In the recent weeks they have increased shipments to an average of 175k cases per week into the United States, with 70% of the volume headed to the East Coast. That volume is expected to remain the same as Chile is shipping a considerable volume to other markets such as Asia and Europe. Mexico's crop is projected to begin within the next two weeks, peaking small and grade leaning towards Choice Fruit. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

Bananas: Banana supply remains stable at this point in the summer but will most likely tighten back up once school starts back up for the fall. Overall, banana quality has been very good. We will continue to advise distributors and customers to keep a close eye on ripeness throughout the summer months; warm weather can lead to fruit ripeness running away from you. Proper storage temps and sufficient air flow where product is being stored is critical during these warmer months.

Table Grapes: The table grape transition continues; still loading in Nogales for another week, two tops, Coachella is wrapping up and the Central Valley is awakening. Looks like we will have steady supply on Sugraones and Ivory Varieties out of Nogales and Central Valley this week; red varieties (Flames) are tight with Mexico winding down and should ramp up out of California this week. Markets are firmer this week but should improve next week. Quality is mixed, seeing more stressed fruit out of Mexico while California is strong.

Blueberries: Production is active in Central Mexico, Oregon, and New Jersey. Central Mexico volume remains low but consistent. New Jersey is improving after a slow start caused by heat, humidity, and labor shortages. Oregon is ramping up and coming into peak production, with strong volume expected through late July. Overall supply is steady, and availability is good.

Blackberries: Production is ongoing in Central Mexico, Baja Mexico, Tennessee, and Oxnard, while Georgia has finished for the season. Hot and humid conditions across the Midwest and East Coast are creating challenges for crops in the Southeast and Northeast. Quality in Mexico has ranged from fair to good, with some reports of soft berries and color reversion, while fruit from Tennessee and Oxnard is showing stronger performance. Growers are closely monitoring quality across all regions. Supplies and availability are expected to remain tight in the coming weeks.

CITRUS

Limes: ESCALATED ON LARGE SIZES We are starting to see supplies improve slightly on 175's while 110's and 150's remain snug. We will need to sub to 175's this week on orders calling for 150's and larger. Good supplies on smaller-sized fruit (200's, 230's and 250's). 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: EXTREME Lettuce quality looks okay 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 has continued to escalate and will probably continue to do so until supplies improve. Recent harsh weather in MX has increased demand on the CA supply and is putting unexpected pressure on the Salinas region. Growers are doing their best to hold to averages, but there have been some prorates, and we may see some more on the horizon before supplies return to normal. The market remains at the Extreme Level.

Iceberg VA: ESCALATED Quality looks okay, but supplies are very tight. Growers are holding to averages when they can, but we have seen some prorates and do expect to see some more.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: EXTREME Lighter supply and higher demand this week. In the west Bakerfield is about done while the coastal plantings are slowly ramping up. We hope to see some relief in the west this coming week. In the east rain has delayed the crops and it looks like several regions are about 10 days behind. Quality is good but supply will be short enough that scaling back portions may be necessary this week and next.

Color Bell Pepper: EXTREME High demand and very short supply out of the east and west coasts has driven markets to record highs this week. Canada remains steady on 11# all sizes but prices are up. Transitions and rain delays domestically have caused these shortages. Quality is mixed...you will see a lot of greener skinned fruit this week and next, but overall quality will be fair. We expect to see short markets over the next 10-14 days...we recommend scaling back portions if necessary while we navigate these shortages.

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

Mixed Chili Pepper: WATCHLIST Supplies in general are fair across most varieties out of Mainland Mexico and Baja this week. Supply will slowly improve just as quality with the additional volume. Jalapeño, Poblano and Tomatillo were lighter this week. Shishito will be the shortest and could see some supply interruptions. Fresno hot pepper is slowing ramping up, seeing some Poblano and Jalapeno this week while in the east we will transition out of South Georgia to the Carolinas. Quality is fair at best across the entire category.

Lemons: WATCHLIST ON SMALL SIZES 165's and below

Lemons are looking extremely tight as we continue towards the end of summer. Most shippers are holding to averages, particularly on the smaller sizes. Fancy grade percentage is down this season due to high wind events, which has impacted fruit quality. There will be little to no relief on the import side of the market if you are not participating on an import program.

Romaine VA: ESCALATED Quality and supplies are okay, but we are keeping an eye on insect pressure and the weather. Most growers are holding to averages.

Romaine, Romaine Hearts: ESCALATED Romaine and Romaine heart quality are okay, but supplies are tight. There have been some reports of fringe burns and light cupping. Insect pressure is being reported. We have also had some initial reports of small amounts of INSV and sclerotinia in some of the romaine fields. The market is trending higher. Romaine, VA Blends and Romaine Hearts are all still escalated, and most growers are holding to averages.

Green Leaf and Red Leaf: Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure.

Eggplant: Domestic supply is steady out of Fresno and the Local regions in the east. Quality is good.

Slicer Cucumbers: Stable supply crossing through Olay and McAllen. Domestic supply out of Georgia is wrapping up this week and will transition to North Carolina and Tennessee. Quality is outstanding in the west and fair in the east.

English Cucumbers: Good supply available this week. Quality is good.

Pickles: Light supply expected over the coming week out of South Georgia and should then transition to the Carolinas as well as Michigan.

Green Beans: EXTREME Crops continue to face a challenging climate dynamic, with excessive moisture and extreme heat disrupting growing conditions both domestically and internationally. These volatile weather patterns have led to imbalances across key regions, impacting yields and straining productivity. That said, we remain optimistic about improvements in performance and yield as we move through late July and into August.

French Beans: WATCHLIST Production out of Guatemala has increased; however, recent rain has negatively impacted quality and shelf life. Container delays also continue to affect consistency in arrivals. Meanwhile, Mexico is providing a fair supply of French beans, helping to support overall availability.

Zucchini/Yellow Squash: WATCHLIST Loading new crop out of the Carolinas and Tennessee, markets have eased back. In the west we now in Full production out of Fresno and Baja with some lingering production out of Sonora. Quality is mixed.

HERBS

WATCHLIST In the East, basil quality continues to struggle due to persistent rain in Colombia. Imported chervil has begun arriving from Ecuador, though volume remains very limited. Out West, basil supply and quality are strong. Overall, supply on most other herbs is steady, with the exception of chervil, which remains limited due to 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

Cantaloupe: We have completely transitioned to the central valley this week and loading fruit out of Firebaugh and Huron! Fruit quality is outstanding; we are seeing good shell and internal color in the fields; brix levels mostly in the 14-16% range consistently. Sizing distributions is starting to improve with a good mix of 9's and 12's available. Supply should be steady going forward barring any unforeseen weather that could impact the crop.

Watermelon: Watermelon volume is very good out of California, Arizona, Texas, and the Carolinas. Quality is outstanding.

Golden Honeydew: Limited supplies available.

Honeydew: Honeydew production has started off strong and is coming in heavy on 5's this week. Both Cantaloupe and Dews will need to be flexible on sizing this week. Quality is good; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dews are mostly in the 14-16% range.

MIXED VEGETABLES

Artichokes: Quality and Supply are good.

Asparagus: Baja production continues to be steady. Guanajuato production remains low due to weather. Peruvian volume is unchanged with smaller sizes. Markets have continued to decline.

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 (diamond back moth) has been reported and is affecting yields. MX has had severe weather and increased insect pressure resulting in extreme shortages. The market is escalated. Growers are holding to averages. Organic Broccoli is at the Extreme Trigger.

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

Brussels Sprouts: **EXTREME** Supplies are tight. Growers are holding to averages when they can, but we have seen some prorates. One of the largest suppliers has wrapped up harvesting in Oxnard and MX. They are relying on Salinas to harvest 100% right now. We can expect to see light supplies for the next few weeks until they get settled in Salinas and get the volume they need. The market is at the Extreme Trigger.

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: Quality and supplies are good right now.

Corn, Sweet: **ESCALATED** Markets firmed up this week as Georgia closes for the summer and we start the transition north. In the west, Tracy and Brentwood are now in full production. We should see some improvement in supply and markets over the next ten days. Quality is good in all locations.

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

Kale: Supplies have improved, and quality is good.

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

Garlic: **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 are limited with some growers and quality is still good for now. We have seen some reports of weak texture, discoloration, wilting and there has been some insect damage. We have also recently seen heavy mechanical damage due to brittle texture. The warm soil temperatures are leading to rapid growth.

Spring Mix: **WATCHLIST** Supplies on Spring mix are tightening up with insect damage affecting some of the varieties. We have added this item to the watchlist.

Snow Peas and Sugar Snaps: **WATCHLIST** Guatemalan snow pea and sugar snap production is down due to ongoing rain in the growing regions, with most growers halting shipments as quality has been significantly impacted. Peruvian production remains steady and is helping to support limited supply. Mexico has finished its season for both snow peas and sugar snaps, and domestic availability continues to be limited.

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

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:

Suspension Agreement Update: As we continue to navigate the impacts of the Suspension Agreement termination, we want to keep you informed with the latest developments. At this time, duties will be imposed on Mexican tomatoes, as growers were notified just Monday evening of the duties being retroactive. We are actively working with each grower partner to gather a breakdown of how duties will be applied for tomatoes imported from Mexico and will provide updates once we have completed the implementation process.

EAST COAST

Round and Roma Tomatoes: Supply is slowly ramping up out of North Carolina and Tennessee. Current quality will be mixed due to weather but should improve with each harvest. Rounds volume should improve towards the end of next week while Romas are short, overall volume should improve over the next week.

Snacking Tomatoes (Cherry, Grape and Medley):

ESCALATED

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

California: Strong production out of the valley should continue for the month of July. Rounds are plentiful, Romas were short this week due to higher demand and priced much higher. Overall quality is good.

MEXICO

Round Tomatoes: Volume will slowly improve over the next week, crossing through McAllen and Ota. Larger sizes are short; good supplies on 5X5-6X6's overall demand is mixed, and quality is excellent.

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

Production is better this week out of Jalisco, San Luis Potosi and Baja. Quality remains good.

Snacking Tomatoes:

Grape - ESCALATED Lighter supply from the mainland mostly due to weather. Most of the volume seems to be coming from the Baja; quality is very good. Markets are higher this week due to the lighter supply out of the east as well as mainland Mexico.

Cherry - Most of the volume seems to be crossing from the Baja; quality is very good. Demand is flat.

Medley - Lighter volume this week available through McAllen and Ota. Quality is mostly good. 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.

DAIRY:

Dairy prices across the major exporters were generally steady to lower this week. Hot and dry weather is slowing growth in the EU and the Northern Hemisphere is past the seasonal peak so I think we have to blame the weakness mostly on demand. Lumpy Skin Disease has shown up on at least a dozen farms in the EU (some beef, some dairy). Vaccines are being rolled out to stop the spread, but more cases will likely be found. The impact on production so far seems minimal. The U.S. administration has announced higher tariffs for 21 countries that will be implemented on August 1st, some of them large dairy importers. So far I don't think any have announced retaliatory measures against the U.S. yet.

BEEF:

568k head is the industry guess for the harvest this week. A weekly harvest between 565k and 575k head is expected through the rest of July. Packer margins are negative \$110 per head, and steady to higher cattle prices are expected this week as volatility in cattle futures continues. The boxed market is looking for direction, with prompts more common as packers work to balance inventories and stem the red ink. Traditionally, the next two or so weeks see weakened demand, and this year, high retails may exacerbate the normal seasonal slowdown. The first week of August should bring buyers looking to secure Labor Day feature items.

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 mostly higher for caged white eggs. The undertone is firm for the heavier weight eggs, lower for Medium. Demand into retail channels is in a range for about moderate to good. Loose egg movement is moderate to fairly good. Offerings are light for the larger sizes. Supplies remain light to moderate. Market activity is moderate to active. California weighted average delivered prices are lightly tested. The undertone is fully steady to firm for the larger sizes. Retail and institutional demand is generally moderate to fairly good for the light offerings. Supplies are moderate to light. Market activity is moderate.

PORK:

Pork plants continue to face challenges related to immigration issues and worker absenteeism. While some employees have moved on, new hires are in place—but training takes time. Until plants are fully staffed and running at 100%, expect converted items like St. Louis ribs and boneless butts to remain tight. On the other hand, bone-in butts and spareribs should see improved availability. Trim is expected to tighten as well due to reduced conversion creating less trim. Steady to firm is the call on hogs this week.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS - Prices are trending steady to weak for WOGS ; steady for whole fryers. Supplies are moderate to heavy with 3-4 pound size wogs available and competitively priced. Demand is light to moderate. Floor stocks are at least sufficient. Market activity is moderate to slow. In the parts sector, prices continue to trend firm for wings; steady to firm for tenders and b/s breast; steady for fronts and bone-in breasts. Dark meat cuts are steady to weak with b/s thigh meat noted in the longer position. Supplies of wings are moderate to tight with medium and jumbo sizes well cleared; tenders and b/s breast are light to moderate. Fronts and bone-in breasts are moderate and dark meat cuts moderate to heavy for current needs. Demand is moderate to good. Market activity is moderate.

EXPORT MARKET - Export demand is moderate.

TURKEY:

DOMESTIC MARKET HIGHLIGHTS - The market on frozen 8-16 lb. hens and 16-24 lb. toms is steady to firm. Frozen Grade A 8-16 lb. hens and 16-24 lb. toms demand is light to moderate. Offerings very light on frozen 8-16 lb. hens and 16-24 lb. toms 149-171 cents fob for current shipments. Trading slow. Frozen commodity basted equivalent 8-16 lb. hens 156.50 cents FOB.

The market on tom breast meat and destrapped tenderloins is steady to 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 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 tom necks market is steady with some price resistances noted, balance of tom and hen bulk parts markets steady to firm. Demand moderate to good. Offerings short to light with some finding tom necks not as tight as previous weeks. The thigh meat market is steady with a firm undertone. Demand moderate to good. Offerings short to light. Hearts and defatted gizzards steady to weak, livers steady. Demand light. Offerings light to moderate. Mechanically separated turkey (MST) is steady to firm. Demand moderate to good. Offerings short to light. Trading slow to moderate.

EXPORT MARKET HIGHLIGHTS - Trading slow. Market steady to firm with strength reported on fresh tom breast meat. Demand moderate to instances good. Offerings short to light.



Fresh Is Everything

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