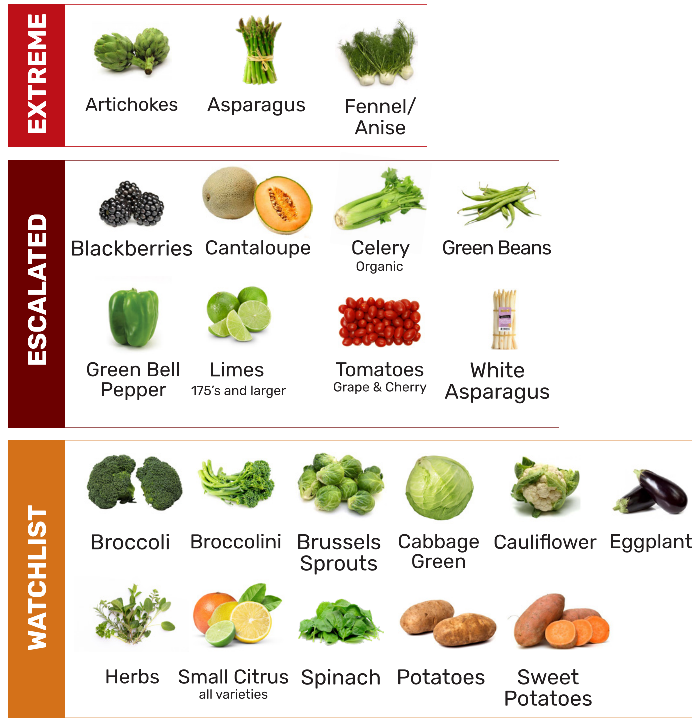
Weekly Market Review
July 31, 2026

Overview



Tomato production continues to fluctuate in South Carolina, Tennessee, and Virginia due to rain, while Mexico's production of Rounds and Romas remains steady. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady.

The **Lime** market will begin to ease as more volume crosses the border, with peak sizing concentrated on smaller fruit. Sizes 175 and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks.

Hot Pepper production is expected to stabilize most varieties; however, Shishito, Habanero, and Red Fresno Peppers continue to be in the shortest supply.

Table Grape supplies are steady this week, and quality is outstanding on the new crop out of California.

We will also start to see the impacts of the Canadian Tariffs on **mushrooms** impact the industry over the coming weeks. In addition to these increases we will also see increases across the domestic supply chain which mostly impact growing and operating costs.

The market remains active but supplies and quality have improved. **Celery** remains the current exception. Quality issues are causing shortages, and the market is responding accordingly. Disease and insect pressure will continue to reduce harvestable acreage; however, supplies are currently at steady levels for the rest of the commodities. Growers anticipate these challenges will remain a significant factor impacting supplies throughout the season, with **Lettuce, Broccoli, Cauliflower**, and **Celery** availability expected to remain difficult throughout the summer months.

As the temperature continues to increase in Salinas, these items could be further impacted. There is a current heatwave that will continue through the weekend. **Artichokes** and **Anise/ Fennel** remain in limited supply and at the extreme trigger due to ongoing supply constraints.

The **Avocado** market remains stable as production from Mexico, California, and Peru continues to provide ample supply to meet current U.S. demand. Larger fruit comes at a premium cost, as the size profile favors 60ct and smaller. California and Peru production is slowly starting to taper off but we can expect a few more weeks of good volume from both.

Cantaloupe supplies have returned to normal, while Honeydew volume has stabilized.

Berry markets remain generally well supplied, supported by good production across key growing regions and improving seasonal transitions. While some production areas are experiencing the typical seasonal decline, emerging harvests and peak production in other regions are maintaining balanced availability and strong overall quality. The primary exception is a continued regional transition that may create localized shifts in supply, but no widespread disruptions are anticipated. Overall, market conditions are expected to remain stable over the next several weeks, with favorable quality and adequate volumes supporting customer demand.

Citrus markets are experiencing tight supplies of smaller sizes across many varieties, including **Lemons** and **Oranges**, with fruit generally trending larger. California Valencias are in full swing, with Navels winding down. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. **Grapefruit** supplies are currently stable. Please consider imported citrus this summer, as it will help relieve strained sizing, particularly for East Coast demand.

Freight: Limited truck availability and record-high fuel costs are putting upward pressure on rates daily.

FRUITS & VEGETABLES

Avocados: The Flor Loca avocado harvest has officially begun in Mexico. As with every seasonal transition, there are a few characteristics that are common during the early stages of the Flor Loca crop: lenticel marking, checkerboarding, and fruit color remains green. Mexico sent 42.8 million pounds to the U.S. last week, average dry matter is 26.5%. California harvested 10.6 million pounds and has an average dry matter of 30%. Peru sent 6.5 million pounds with dry matter around 25%.

Table Grapes: We have completely transitioned to California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season.

Bananas: Banana supply will be stable, but production curtailed due to virus pressure, low yields, and rising costs. Though quality is very good and current supply is adequate, consistency will be crucial. To navigate the coming year, ensure consistent supply, maintain regular ordering patterns, and proactively address any potential issues impacting the banana program. Bunker rates will be released this week and next, expect them to be higher due to rising fuel costs.

Pineapples: In the coming weeks, Pineapple supplies will tighten up due to the natural flowering process. Contract volume should hold firm, but open market availability will drop, causing pricing to increase. Suppliers are expecting this to last for 4 to 6 weeks. This should not affect quality, which has been good. In the meantime, supply exceeds demand, keeping market pricing stable.

BERRIES

Strawberries: Strawberry supplies remain strong despite seasonal volume declines in Watsonville and Salinas. Fruit quality is generally good across both conventional and organic programs, with only minor bruising and soft skin reported. Santa Maria has begun harvesting light volumes of the organic fall crop, with conventional fall production expected to begin next week, helping support a smooth seasonal transition. Markets are expected to remain stable, with adequate supplies available even as weekly harvest volumes gradually decrease.

Blackberries: **ESCALATED** Blackberry supplies remain mixed as Watsonville continues peak production while Mexican conventional volumes stay light through August before improving in September. Quality in Watsonville remains strong, while Mexican fruit is rated fair to good due to weather-related impacts. Organic and conventional volumes from Watsonville are expected to increase in early August, improving overall market availability. Markets should gradually ease as California production offsets lighter Mexican supplies.

Blueberries: Blueberry supplies are transitioning as Mexican production has concluded and California's Ukiah region approaches the end of its season. Pacific Northwest production continues to strengthen, with Washington, Oregon, and British Columbia harvesting midseason varieties and weather conditions improving following brief heat and rain interruptions. Quality remains excellent, and strong Northwest volumes are expected to support the market through the coming weeks. Overall availability should remain favorable as Northwest production becomes the primary supply source.

Raspberries: Raspberry supplies continue to improve as Watsonville enters peak production, with strong volumes expected through August. Mexican production also remains in peak harvest, providing additional supply support through the end of July. Fruit quality is excellent across both growing regions, with good firmness, color, and flavor reported. Markets are expected to remain steady as peak seasonal production continues.

CITRUS

Limes: **ESCALATED** Supply continues to improve despite heavy rains in Mexico; however, sizing issues continue on fruit out of Mexico and other regions across Central America. The size distribution will continue to skew heavily toward 230s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next few weeks.

Lemons: 140/165/200's are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

Navels: Finishing up, some suppliers are completely finished with Navels.

Valencias: California Valencias have begun and are projected to have strained supplies on small sizes.

Mandarins: Mandarins are finishing up and imports are coming in. Be in contact with your supplier on other varieties or imports as alternative options.

Grapefruit: California Grapefruit available!

WEST COAST LETTUCE

Iceberg: Lettuce quality and supplies are good. We have seen some reports of internal burn.
Iceberg VA: Quality and supplies are good.
Romaine VA: Quality is good and supplies are improving. We are still seeing more core in the bags and some mildew.
Romaine & Romaine Hearts: Supplies and quality are good. Romaine Hearts remain at the extreme level.
Boston/Butter Lettuce: Quality and supplies look good.
Green Leaf, Better Burger and Red Leaf: Quality and supplies are good.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: ESCALATED Supply is steady out of South Georgia and South Carolina in the East and Arvin in the West. Quality is good out of all regions.
Color Bell Pepper: Good supply available out of Coachella and South Georgia this week. Quality is outstanding on open-field varieties. The Hot House Pepper category is steady out of Canada and Mexico. Overall, quality is good.
Jicama: Stable supply and good quality available.
Mini Sweet Pepper: Supply will be stable over the next week. Quality remains good.
Mixed Chili Pepper: Supplies stable on most varieties. Decent numbers crossing from Mexico; Coachella and South Georgia are ramping up. Markets remain very short on Habanero, Fresnos, and Shishito; for Fresnos, we recommend subbing to Red Jalapeno.
Tomatillo: Good supply and quality available this week.
Eggplant: WATCHLIST Central Valley is now in full production out of California. Quality is fair. We are mostly seeing Choice available, with #1 Fruit being limited. Local programs in the east- Tennessee, North Carolina and Michigan- Limited this week.
English Cucumbers: Excellent supply out of Canada, Nogales and McAllen. Quality is good.
Slicer Cucumbers: Supply crossing through Nogales and McAllen will tighten up as the season starts to close. In the east we are seeing good supply out of Florida and South Georgia. Quality is good from all shipping points.
Pickles: Lighter supply available out of South Georgia, Florida, and Mexico. Quality is good.
Green Beans: ESCALATED Lighter supply out of South Georgia and Kentucky in the East. In the West, Orange County and Baja supplies are limited. Quality remains mixed; good in the West and mixed in the East.
French Beans: French Beans: Supplies remain favorable as Guatemalan production continues at steady levels. Both organic and conventional product from Guatemala is readily available, while conventional production from Mexico also remains strong. Overall market conditions are well balanced, with stable production supporting good availability, consistent quality, and ample supply.
Zucchini/Yellow Squash: Steady supply on green and yellow out of South Georgia and Fresno. Quality is good.

MELONS

Watermelon: The market has improved slightly as new growing areas out east have started harvesting. Production in the west has also increased but is still below levels from last year. Pricing remains elevated but should start to cool off, has more growing regions up north come one and demand levels off.
Cantaloupe: The market has seen a spike in volume recently that has led to softer pricing. Suppliers are reporting good sizing, strong external appearance and an excellent flavor profile. Production is expected to remain strong, moving forward. Fields are currently producing more 9s, while 12/15s are limited.
Honeydew: Honeydew production is gradually increasing, but not fast enough yet to fully recover from the previous shortage. Available sizing is primarily 5s, 6s are limited and 8s are hard to find. Overall pricing is still holding firm, but quality has been good.

ONIONS:

Washington has started harvesting helping take some pressure off the issues off both New Mexico and California. Overall, the market is still struggling to keep up with demand, keeping open market pricing elevated. As we get more production from the Northwest, the market will begin to stabilize.

POTATOES:

WATCHLIST The market has strengthened as the size profile has shifted to finish out last year's crop. Suppliers are seeing a shift in the size profile toward smaller count sizes, 70–120ct, while 40–60ct have become tighter. Suppliers are watching inventories closely to make sure there is enough to last until new crop and to monitor quality issues. Shippers are requesting additional lead time and some flexibility on sizing when possible. Suppliers are covering programs and consistent customers.

SWEET POTATOES:

WATCHLIST The sweet potato market remains tight as we move into the final stretch of the 2025 storage crop. Limited supplies remain available nationwide, particularly on premium U.S. No. 1 grades and larger counts. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. North Carolina and Mississippi growers are reporting lighter yields and tighter availability due to weather-related challenges from last season. Quality remains generally good; however, some lots are showing increased cosmetic defects and shrink tied to weather stress from last growing season. New crop harvest is expected to begin in limited volumes during August, with broader availability arriving in September. Suppliers are covering programs and consistent customers.

HERBS

WATCHLIST Herb supplies remain generally stable this week, with basil continuing to report good production, quality, and availability. Most herb varieties are seeing consistent market conditions, although oregano quality from Colombia remains affected by Rainfall, while chervil availability continues to be limited due to heat. Overall quality across the category remains favorable, with only isolated weather-related challenges affecting select items.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Steady	USA
Basil	Steady	Steady	MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Steady	Steady	USA
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	USA/MEX
Cilantro	Steady	Steady	Costa Rica
Dill	Steady	Steady	USA/MEX
Epazote	Steady	Steady	MEX
Lemongrass	Steady	Steady	USA
Marjoram	Steady	Steady	USA
Mint	Steady	Steady	USA
Oregano	Steady	Good	USA/MEX
Italian Parsley	Steady	Steady	USA
Rosemary	Steady	Steady	USA
Sage	Steady	Steady	USA/MEX
Savory	Steady	Steady	USA
Sorrel	Steady	Steady	USA
Tarragon	Limited	Steady	MEX
Thyme	Steady	Steady	USA/MEX
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

MIXED VEGETABLES

Artichokes: **EXTREME** Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated. 12ct's remain at the extreme trigger.

Asparagus: **EXTREME** The market remains very active as demand continues to exceed available supplies. Northern Peru remains the primary production region and is expected to support the market through the first half of August before the seasonal transition to Southern Peru begins. Mexican production remains very limited and is expected to stay light through the remainder of the month, keeping the industry heavily dependent on Peruvian supplies. While the transition into Southern Peru is expected to be orderly, temporary supply gaps may occur until harvest volumes increase. Markets are expected to remain tight over the next 2 to 4 weeks as the industry works through the seasonal transition and production gradually improves.

Bok Choy: Quality is okay and supplies are limited.

Broccoli Florets/Broccoli Crowns: **WATCHLIST** Quality and supplies are good. A few reports of browning and pin rot continue. Organic Crowns remain at the extreme level. With insect pressure increasing, we will keep this item on the watchlist.

Broccolini and Sweet Baby Broccoli: **WATCHLIST** Quality is good, but supplies are limited.

Brussels Sprouts: **WATCHLIST** Quality and supplies have improved.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Quality and supplies are good.

Cauliflower: **WATCHLIST** Quality and supplies are good. With insect pressure increasing, we will keep this item on the watchlist.

Celery: **ESCALATED** Quality and supplies have improved. Disease pressure is still a factor, especially on organic celery but overall quality and supplies look good. Organic Celery is still at the extreme level.

Corn, Sweet: Light supply and firm markets will continue out of South Georgia, Virginia, Illinois and North Carolina in the East and California, Oregon and Washington out West. We expect to see demand stay strong and prices will be firm over the next week. Quality is good out of all regions.

Fennel: **EXTREME** Lower field yields have caused a shortage in supply. Pricing will remain escalated until supplies improve. Some growers are holding to 8-week averages, though prorates have been observed.

Kale: Quality and supplies look good.

Leeks: Quality and supplies look okay.

Garlic: Quality remains good although supply is snug on this Garlic crop. Continue to purchase steadily to ensure product as the year progresses.

Ginger: Supplies and market are steady.

Green Cabbage: **WATCHLIST** Supplies and quality are good.

Green Onions: Supplies and quality are good.

Mushrooms: Supply is expected to be steady for the next several weeks. Quality is good. We do expect to see some cost increases over the coming months. In recent years, Canadian mushroom farmers received unfair subsidies, giving them a clear advantage over the domestic mushroom farming industry. The USDOC ruled that Canadian growers were receiving unfair subsidies on fresh mushrooms from Canada and will see duties applied from 1.62–4.97%. These duties will be applied once the ruling is formally published. This will not only increase the price of imported mushrooms from Canada but will also put upward pressure on the price of domestically grown product as well. This is something domestic growers have been seeking some time to support increases in their operating costs over the past five years. We are also expecting to see domestic suppliers implement cost of living increases as the dust settles on the DOC rulings to compensate for increased growing costs, food safety, labor etc. Brought on by years of dumping practices out of Canada.

Napa Cabbage: Quality and supplies have improved.

Parsley (Curly, Italian): Quality and supplies are 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 looks good, but supplies are light.

Spinach: **WATCHLIST** Supplies and quality look good but we are seeing rapid growth from the warmer weather which is resulting in larger leaf sizing and weaker texture. Insect activity has also increased. We are adding this item to the watchlist.

Spring Mix: Supplies and quality look good.

Snow Peas and Sugar Snaps: Supply conditions continue to improve as production out of Guatemala increases, with sugar snap pea availability strengthening at a faster pace than snow peas. Domestic sugar snap supplies remain adequate, while snow pea availability is still somewhat more limited. Overall market conditions are trending in a positive direction, and the continued ramp-up in Guatemalan production is expected to improve availability and provide more consistent supply coverage over the next several weeks.

TOMATOES: MEXICO

Round Tomatoes: Supply will remain snug on larger-sized fruit this week. Quality is outstanding on what is crossing this week.

Roma Tomatoes: Excellent supply and quality available out of Jalisco and Baja.

Grape Medley, Grape and Cherry Tomatoes: ESCALATED Grape Tomatoes and Cherries are very short this week due to lighter harvesting and higher demand. Medleys seem to be readily available. Quality on what is crossing the border has been good across all varieties.

TOMATOES: CALIFORNIA

Supply continues to improve with steady availability across the Golden State. Crops look amazing; we expect a great California season on vine ripes as well as mature greens.

TOMATOES: EAST COAST

Round & Roma Tomatoes: Volume remains light this week out of Tennessee and North Carolina, mostly due to rain delays. Quality is mixed out of all regions. Small fruit is short, possibly requiring size substitutions.

Snacking, Grape Medley, Grape and Cherry Tomatoes: ESCALATED Lighter volume this week on grapes, medley, and cherries due to transition. Quality is fair at best.

OTHER FRUIT:

Apples: As we move through the summer storage season, Washington apple inventories continue to trend below both last year and historical averages across many key varieties, supporting the firm pricing environment that has developed throughout 2026. According to the most recent storage reporting, total conventional apple inventories stood at 39.4 million cartons, down 12% from 44.9 million cartons last year and slightly below the three-year average of 40.4 million cartons. The market will remain elevated until new crop apples start in August.

Pears: D'Anjou availability is tight and primarily limited to U.S. #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 U.S. #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 supply out of Mexico.

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

Cherries: Good supply out of Washington State. NEW CROP.

Stone Fruit: Steady supply out of California and other local regions.

Papaya: Maradol are steady out of Mexico, while Solos and Hawaiians are tight.

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

Mangoes: Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommys, and Ataulfo.

Kiwi Fruit: Supplies are fair out of Chile.

Quince: Limited supply available this week.

DAIRY:

Europe has been hit with a number of heat waves this summer and large parts have been trending dry to very dry as well. I thought we still had another month or two or weakness for EU butter/cheese prices before the market turned, but those prices have been rallying over the past 3 weeks on supply concerns. I still think there is adequate to more than adequate supply, so I don't want to get too bulled up, but it is also hard to ignore the market strength and potential supply risks. The risks to logistics are also a concern (Strait of Hormuz, Black Sea, Sea of Azov, Bab-el-Mandeb Strait).

SHELL EGGS:

National FOB shell egg weighted average prices are mostly higher for the larger sizes, while lightly tested for the lighter weight eggs. The undertone is higher for the larger sized eggs, steady for Medium. Retail demand is moderate to fairly good, while loose egg movement is light to at times moderate. Offerings are light to moderate with Medium most available. Supplies are light to moderate. Market activity is moderate. California weighted average delivered prices are higher although lightly tested. The undertone ranges steady to firm with the larger sizes in the stronger position. Retail demand is seasonally moderate. Food service demand is light to moderate. Distributive buying interest is as needed only. Offerings are light. Supplies are moderate. Market activity is moderate.

PROTEIN:

Beef: The weather continues to be a headwind for beef demand. Depending on where you are located, it's hot, smoky, rainy, or all three, and none of those conditions help beef movement during the summer lull.

At a higher level, the industry is starting to align around the idea that beef demand has peaked and is beginning to soften. Wholesale prices during the run-up to the Fourth of July never surpassed the highs established earlier this year, cattle and futures markets have moved sharply lower, and consumers continue to feel the impact of higher overall living costs. Tight cattle supplies remain supportive, but supply is no longer the primary driver of price direction. Demand is now setting the tone.

In the near term, expect sluggish movement and lackluster trading over the next 7 to 14 days. Packers will likely continue to offer spot-buy and quick-ship opportunities to keep product moving. While boxed beef values and cutouts have declined significantly in recent weeks, the market is approaching levels where additional downside is more limited.

This week's harvest is projected at approximately 525,000 head. The industry's attention now turns to Friday's Cattle on Feed report. Expectations are for a relatively neutral report with few surprises. Looking ahead, Labor Day buying interest should begin to emerge in early August and provide the next meaningful opportunity for demand to improve.

Pork: Lower hog weights and strong demand for hams and bellies should keep the cutout supported this week. Mexico continues to be an aggressive buyer of hams, and seasonal BLT demand is keeping belly values elevated. While bellies appear to have found a near-term top, they are still trading at levels that provide meaningful support to the complex.
Ribs are the weak spot. With summer grilling demand fading, there is likely additional downside until Labor Day buying starts to surface in August. Butts and loins should trade mostly steady and are not expected to be major movers this week. The story hasn't changed. Lower hog weights are happening, Mexico is pulling hams, and bellies remain historically strong. As long as those conditions remain in place, the cutout should stay supported despite some seasonal weakness in ribs.

Chicken: WOGs are about steady with fully adequate supplies. Floor stocks are adequate. Demand is moderate. Bone-in breasts and front halves range steady to about steady. Tenders are steady, supplies are moderate. Wings are mostly steady. Legs and leg quarters pricing is trending lower along with thigh and leg meat. The market is moderate to light. Export markets are softening.

Turkey: Frozen 8-16 lb. hens and 16-24 lb. toms steady. Demand light. Offerings light. Frozen commodity Grade A 8-16 lb. hens offered at 173-188 and 16-24 lb. toms at 175-188 cents FOB for current shipments. The market on white meat and white trim is weak to steady. Demand is light. Offerings of fresh white meat are light. Frozen white meat and white trim offerings remain light. Cooked and deli demand light.

Grade A consumer sized breasts, institutional sized breasts are steady. Tom drums, fullcut ,and V-type wings are steady to weak with the balance of bulk parts mostly steady. Demand light to instances moderate. Offerings short to light. The thigh meat market is steady. Demand light. Offerings very light to light. Defatted gizzards, hearts and livers steady to barely steady. Demand and offerings light. Tails steady. Demand and offerings light. Tom necks weak with demand very light. Mechanically separated turkey (MST) market is weak. Demand is light for both fresh and frozen. Offerings light to moderate with fresh the most available. Trading slow.
Export markets are trading slow. Market steady to weak. Demand light. Offerings light to moderate.