

## 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, heavy rain and local flooding to the region over the next few weeks. This will impact harvest schedules and freight coming from Southern Mexico to the US Border. Jalisco, Baja and Monterey will all see stronger demand and lighter numbers this week, pushing prices higher across the entire category; **Grape Tomatoes** are particularly short this week. Quality is very good out of Mexico. In the East, Georgia is done and should see more volume transition to North Carolina and Tennessee later this week. California production on Tomato and veg is strong; production on mixed dry veg will be challenging this week on both coasts due to transition. The tightest items are **Grape Tomatoes, Tomatillo, Habanero**, and **Jalapenos**.


































The Mexican **Table Grape** season will continue out of Mexico this week and we should see some additional domestic volume out of the desert, as well. Arvin and Delano started this week. **Melons** have fully transitioned to the Central Valley and quality is outstanding. **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.

Mexico's current size curve is not aligned with current market demand. Throughout the year, 60ct fruit has become the new standard as many programs adjusted to smaller sizing. However, an inverted market is anticipated next week, with 60ct expected to command higher prices than 48ct. This year's Loca crop is forecasted to yield a higher percentage of 48ct fruit compared to recent seasons. As an off-bloom and lighter crop, Loca fruit tends to be cleaner, significantly reducing the industry's availability of #2s. This trend is already taking shape; small #2 volumes have declined over the past month. Market pricing is softening on larger fruit while strengthening on small and medium sizes. Mexico is nearing the end of its season, offering high dry matter fruit with a substantial proportion of Grade 2s. The transition to the Flor Loca crop is expected by mid-July, a period often marked by variability in dry matter, sizing, and ripening rates. California is having a solid season, maintaining approximately 20% market share, though volumes are beginning to taper. Peru continues to supply strong volumes, even with a reduced crop estimate, and is expected to remain steady through the summer. Meanwhile, Colombia's Travesia season is winding down, with volumes projected to decline through August.

Temperatures in Salinas remain cool near the coast and that is prompting a slow growth pattern. 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. Supplies have really started to tighten up on quite a few items. The **Lettuce** market has continued to rise. 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 still escalated. Growers are doing their best to cover averages, but some outside labels are being used in order to fill orders at this time.

## MARKET ALERT

EXTREME	 Brussels Sprouts	 Lettuce VA Blends			
ESCALATED	 Avocados	 Banana	 Bok Choy	 Broccoli crowns, asian cut, organic, florets	 Cauliflower
	 Celery Organic	 Endive & Escarole	 Fennel Anise	 Garlic	 Hot Peppers Jalapeno, Tomatillo and Shishito
	 Leeks	 Limes large sizes	 Napa	 Romaine Hearts, VA Blends	 Table Grapes
	 Tomatoes Grape	 White Asparagus			
WATCHLIST	 Asparagus	 Blueberries	 Broccolini	 Celery	 Cilantro
	 East Coast Veg: Bell Pepper, Slicer Cucumber, Squash	 French Beans	 Herbs	 Green Onion	 Lemons small sizes
	 Navels small sizes	 Pineapple	 Snow and Sugar Snap Peas	 Spinach	

The **Romaine** and **Romaine Hearts** market has also continued to rise, and Romaine Blends and Hearts are still escalated along with regular Romaine. Demand and lower yields are driving the market. **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. A Market Alert was sent out on that last week. MX does expect supplies to get a little better next week, 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 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 another week. **Salinas** is starting up for some growers so supplies should start to improve but for now, the market is at the extreme level. **Bok Choy, Napa, Endive, Escarole, Fennel** and **Leeks** remain escalated. Overall production in Salinas is still steady.

## FRUITS & VEGETABLES

**Avocados: ESCALATED** The U.S. avocado industry closed last week at 57.4 million pounds, a 9% decline from the previous week. Mexico's market share has dropped to 48%—its lowest this year—while California and Peru continue to build momentum. Jalisco accounts for 4.2% of Mexico's U.S. export volume. The Main Crop is yielding high dry matter fruit (37%) with a significant proportion graded as #2s, while the Off-Bloom (Loca/Mendez) crop has begun harvest, representing 25% of orchards. APEAM has implemented a 23% minimum dry matter requirement. Smaller fruit is tightening with rising prices, whereas markets for 48s and larger have softened. Peru's season is approximately 60% complete, with over 400,000 metric tons shipped globally. U.S. programs are fully active and will continue through summer, with promotable volume on larger sizes. Northern exporters are nearing the end of their season, with supply transitioning south. In California, approximately 12 million pounds were harvested in week 26, with dry matter averaging 28.4%. Sizing is peaking on 60s and 48s, and 220 million pounds have been harvested year-to-date. Although volume will taper in late July, high-quality California fruit is expected to remain available into the fall. Colombia's Travesia volume remains readily available, presenting promotional opportunities on medium and small fruit. Dry matter continues to increase as the season advances, enhancing eating quality. With Peru contributing larger sizes to the market, there may be a favorable window for increased movement of Colombia's medium and small fruit globally. Current shipments are being directed to both the EU/UK and U.S. markets.

**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 across all districts—Santa Maria, Salinas, and Watsonville—has begun to decline following the seasonal peak. Additionally, cooler temperatures have slowed fruit maturity. Overall volumes are expected to dip through July and August, with a significant rebound anticipated as fall production ramps up in Santa Maria and Oxnard. Quality remains strong, featuring full color, medium to large sizing, and excellent flavor. While there have been some reports of bruising and bronzing, field and QA teams are effectively managing quality control to ensure premium pack standards are maintained.

**Blackberries:** Overall availability remains limited across all growing regions. Currently harvesting from Central Mexico, Baja Mexico, Georgia, Tennessee, and Oxnard, with Tennessee and Oxnard just beginning their seasons this week. Initial volumes from these newer regions remain limited. Elevated temperatures and humidity across the Midwest and the East Coast have presented challenges for crops throughout the Southeast and Northeast. We are closely monitoring quality from all growing areas, with a particular focus on packs out of Georgia and Tennessee. During this transitional period, we remain dependent on multiple regions to meet supply needs. Quality has ranged from fair to good in Mexico and Georgia, with some reports of color reversion and softness. Tennessee and Oxnard are showing good initial quality, though availability remains tight overall.

**Bananas: ESCALATED** Banana imports remain extremely light for the next 4 weeks. We continue to struggle with several challenges of recent including record demand and overall lighter supply from the tropics. We are also seeing some logistical challenges due to the labor strikes in Panama that are impacting the global supply. Due to these challenges, we could see minor pro-rates across the network over the next four weeks. Overall, banana quality has been good and improving as we enter the summer grow cycle. Overall inventories are light, and we are seeing higher turns at the port and ripening centers; some of the fruit may not reach optimum color prior to arrival. We are advising distributors and customers to keep a close eye on ripeness; there may be some need to keep a heavier than normal inventory on hand and self-manage color to protect from shorts.

**Table Grapes: ESCALATED** The table grape market remains 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.

**Blueberries: WATCHLIST** Production is currently active in Central Mexico, Oregon, and New Jersey. While Central Mexico remains steady, volumes are low. New Jersey is contending with extreme heat, high humidity, and labor shortages, contributing to a delayed start to the season. Oregon has just begun harvesting, with volume expected to ramp up significantly by early July. Overall blueberry supply is expected to improve over the next 10 days as additional volume becomes available from both the Pacific Northwest and New Jersey. In the meantime, supplies and availability remain limited.

**Raspberries:** Volumes remain relatively steady. 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.

## CITRUS

### **Oranges: WATCHLIST ON SMALL SIZE NAVELS**

Navel season has officially ended, bringing Valencia's into full swing. 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. 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.

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

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

## WEST COAST LETTUCE

**Iceberg: EXTREME** 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 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 holding to averages.

**Iceberg VA: ESCALATED** Quality looks good, but supplies have tightened up. Growers are holding to averages when they can, but you can expect some prorates.

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

## EASTERN AND WESTERN VEGETABLES

**Green Bell Pepper: WATCHLIST** Lighter supply and higher demand this week is putting upward pressure on FOB pricing out of McAllen, North Carolina and Arvin. Coachella and South Georgia are mostly done for the season. Quality is good in all markets.

**Color Bell Pepper: WATCHLIST** Good supply available in McAllen as well as crossing from Baja; Coachella is done and transitioning to Arvin, lighter supply anticipated in Arvin through the weekend. 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 Arvin and The Desert.

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

### **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. District 2 is officially the only growing region, as District 1 is fully wrapped up. 140/165/200 ct lemons are looking extremely tight. Medium to large choice lemons are more readily available as of now. Domestic supplies are tightening quickly. On the import front, availability is also limited. Argentina's shipments to the U.S. are down 77% year-over-year, with some growers reporting freeze damage; crop updates are expected next week. Despite the reduced volume, early quality reports from Argentina remain strong. Europe is paying top dollar for lemons out of Chile since the Turkish and Spanish crops are down, and Chile is favoring this market since it also avoids the tariffs. Size distribution out of Chile is expected to peak at 115s, 140s, and 165s, with approximately 75% to 85% of the crop anticipated to be Fancy grade. Overall volume is projected to increase by about 5% compared to last year, reaching an estimated 21-22 million boxes. Chile's vessels have also been delayed due to weather, further straining the import market. Mexico's crop is projected to begin mid-July, peaking small and reporting down roughly 60% YOY. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages.

**Romaine, Romaine Hearts: ESCALATED** Romaine and Romaine heart quality are good, 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 escalated.

**Green and Red Leaf:** Quality and supplies look good.

**Mixed Chili Pepper: WATCHLIST** Supplies in general are good across most varieties out of Mainland Mexico as well as Baja. Supply will slowly improve just as quality with the additional volume. Jalapeño 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.

**Eggplant:** Domestic supply is steady out of the desert, and quality is outstanding. South Georgia will start this week.

**Slicer Cucumbers: WATCHLIST** Stable supply crossing through Otay 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.

## EASTERN AND WESTERN VEGETABLES - CONTINUED

**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:** **WATCHLIST** Good Supply available with new crop beans coming available out of Georgia and Florida. Coachella should ramp up over the next week. Quality is good.

**French Beans:** **WATCHLIST** Production has increased out of Guatemala; however, quality and shelf life have been impacted by ongoing rainfall and continued shipping delays. In Mexico, a fair supply of French beans remains available.

**Zucchini/Yellow Squash:** **WATCHLIST** Lighter volume out of South Georgia as the season closes. We should be transitioning to the Carolinas and Tennessee over the next week; markets were higher. 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 be impacted by persistent rain in Colombia. Imported chervil has begun arriving from Ecuador, though volume remains extremely limited. Out of the West, basil supply and quality are strong. Supplies of other herbs remain steady, with the exception of chervil, which continues to face weather-related challenges that may persist into the fall.

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:** The desert is mostly done and has transitioned to the central valley. We are loading fruit out of Huron and 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 on the front end of these fields will lean heavy on Jumbo 9's and 9's will some 12's mixed in; this should even out over the coming days as our growers manage the crop and production becomes more consistent. Good supply on Athenas out of South Georgia.

## MIXED VEGETABLES

**Artichokes:** Supplies and quality are both good.

**Asparagus:** **WATCHLIST** Baja and Guanajuato production continues to increase. Peruvian volume continues to increase as well. Michigan production continues to decline due to seasonality. Markets have slowed down with more Mexican and Peruvian product available.

**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. The market is at the extreme level.

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

**Brussels Sprouts:** **EXTREME** 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.

**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 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.

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

**Kale:** Supplies have improved, and quality is good.

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

**Garlic:** **ESCALATED** The 2024-2025 California Garlic season is ending and as is sometimes the case during the transition from old crop to new crop garlic, there is a supply gap before the new California harvest begins. Growers are currently supplementing with product from Mexico to Bridge the Gap until new crop California Garlic gets started the first week of August. Quality remains good although available supplies will be decreasing, "PRICING WILL BE ESCALATED"

**Ginger:** Supplies and market are steady.

**Green Cabbage:** Supplies and quality look good.

**Green Onions:** **WATCHLIST** Supplies and quality look good but there have been some initial reports of light supplies.

**Mushrooms:** Promotable volume available and quality is good.

**Napa Cabbage:** **ESCALATED** Quality and supplies are improving but there is some insect pressure.

**Parsley (Curly, Italian):** Supplies and quality look good.

**Rapini:** Quality is good, but supply continues to be light. The market is strong and therefore the supplies will continue to be light.

**Red Cabbage:** Quality and supplies are good.

**Spinach:** **WATCHLIST** Supplies, and quality are good. We have seen some reports of weak texture, discoloration, wilting and there have been some insect damage but it is all minimal right now.

**Snow Peas and Sugar Snaps:** **WATCHLIST** Production of Guatemalan snow peas and sugar snaps has declined due to ongoing rain in the growing region, with most growers ceasing shipments entirely due to quality concerns. Peruvian production is ramping up, helping to offset some of the shortfall. Mexican production has concluded for the season, and domestic supply is expected to remain limited over the next one to two weeks.

## 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:

### 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:** Strong production out of the valley should continue for the month of July. Quality is good.

### 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:**

**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 Otay. 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:

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 Eucolait 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?

## 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.

**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.

## 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 be steady to higher this week. Little downward movement is expected on any of the primals this week.

## **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 8-16 lb. hens and 16-24 lb. toms demand is light to moderate. Offerings short to light. Frozen basted equivalent 8-16 lb. hens offered at 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.

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



***Fresh Is Everything***

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