

Overview

Post Suspension agreement demand continues to be decent for Mexican **tomatoes** going into the weekend being the domestic supply is short once again this week due to weather in the east. Demand for smaller sized rounds has shifted west to McAllen and Otay Mesa putting upward pressure on FOB prices for those sizes; larger sized fruit was lower in price this week. While we navigate the termination of the agreement there are still a lot of unknowns about how this will impact costs but as we can see demand is not one of them. Grape Tomato supply is good out of all regions as are other varieties in the snaking category. Roma demand is down this week and price is reflective. Quality across the entire category out of Mexico is excellent while domestic fruit was fair out of North Carolina and Tennessee. California production on tomatoes is strong; production on mixed dry veg will be challenging this week on both coasts due to transition.

The tightest items continue to be **Green** and **Color Bell Pepper** and **Red Fresno** and **Tomatillo**.

Grape season is well underway in California; quality and supply are excellent, and we should see steady markets 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 with **Cherries** out of Washington State.

Overall **avocado** supply remains stable, with strong inventory levels reported across Mexico, California, and offshore sources. Mexico's harvest is steady this week, with the Flor Loca crop providing ample volume across all sizes. California production has slowed due to reduced demand and is expected to taper further as the season progresses. Peru continues to ship strong volumes, offering excellent availability of large and jumbo fruit. This remains an ideal time to promote across all sizes and countries of origin.

Temperatures in Salinas continue to be mild. We are seeing some supply and quality issues arise. Insect pressure and INSV have been reported in the fields. Supplies continue to be light for a few items, and the **Romaine** market is once again rising. **Lettuce** supplies are also still limited. We are still seeing lighter weights and lower yields due to smaller heads and increased insect pressure. Growers are covering averages for now, but quality is still good. The industry is expected to see lighter lettuce supplies for at least the next few weeks. Romaine Hearts are still escalated. Fringe burn and INSV are present in some fields. Value Added Romaine is now also escalated with demand driving that market.

Broccoli supplies have improved with the CA growers but we seeing heavy insect pressure, and the markets could start to react. MX growers still expect supply issues throughout the summer. Quality still seems to be good but with reports of increased insect pressure, quality issues could arise. **Brussels Sprouts** supplies are still tight. Some growers are losing yields due to quality. Salinas has offered some relief, and the growers are no longer holding to averages but the market is still at the extreme level. Hopefully we will see that ease up a bit soon. **Fennel/Anise** is also still at the Extreme level. Supplies continue to be very tight. Sizing is small and growers are holding to 8-10-week averages. As of right now, it look like the market will stay limited for several weeks.

MARKET ALERT

EXTREME				
	Asparagus	Bell Peppers orange, red, yellow	Brussels Sprouts	Fennel Anise
				
	Blackberries	Bok Choy	Cilantro	Chili Peppers Tomatillo & Red Fresno
ESCALATED				
	Leeks	Lettuce VA Blends	Napa	Romaine Hearts
				
	Endive & Escarole	Sweet Corn		
WATCHLIST				
	Avocados	Broccolini	Broccoli	French Beans
				
	Green & Red Leaf	Green Onion	Limes	Lemons small sizes
				
	Snow and Sugar Snap Peas	Spinach	Spring Mix	Pineapple

Bok Choy, Napa, Endive, Escarole and **Leeks** remain escalated. School is now back in session so demand will start to increase. The summer months always bring quality and supplies issues, and we can expect things to be a bit of a roller coaster for the next few months.

Valencia **orange's** appearance is excellent, and the juice content is high. Sizing is peaking at 88s, followed by 113s. Some growers are seeing some regreening on the oranges, causing extended gas times. With the gas time varying, please give as much lead time as possible.

Choice **grapefruit** is readily available, but most growers are requiring ample lead time for Fancy grapefruits. Expect to transition into pink grapefruit within a couple of weeks.

With rising temperatures, demand for fresh lemons is increasing. As we push towards the end of District 2's season, things are continuing to remain tight on small **lemons**. Size structure is peaking at 140/115ct choice. 165/200ct Lemons are remaining extremely tight and are projected to remain tight through October. Fancy grade percentage is down this season due to high wind events, which have impacted fruit quality. 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. District 3 is projected to begin in approximately 6 weeks. Growers continue to evaluate fruit across District 3 and are seeing volume fluctuations between regions. Early indicators point to a smaller overall crop this season, though fruit sizing has improved compared to last year. Please note that there is a global strain on lemons.

OVERVIEW – CONTINUED

In Mexico, early picks are expected to begin within the next two to three weeks, with initial crossings anticipated in early to mid-August. While the fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade leaning more toward Choice. Argentina continues to ship significant volumes to Europe and Russia, with 4.5 million cases sent to Europe so far, which is a 71% increase over the total volume shipped to that market in 2024. Peak sizes range between 95s, 115s, and 140s. While overall fruit quality is improved compared to last season, it still varies by supplier. We anticipate shipments to the U.S. to continue through mid-August. At this point, Argentina is approximately 70% through its crop. Chile has shipped close to 1,200,000 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. Ample lead time will be necessary to place orders, especially on small sizes, with most shippers still holding to averages. The California garlic crop has begun, and our partners are not currently taking on new volumes until they have a better idea of their crop. Please keep this in mind when adjusting commitments or requesting new volume!

FRUITS & VEGETABLES

Avocados: WATCHLIST The U.S. avocado industry closed last week at 53.9M pounds, with 35.5M pounds harvested in Mexico and 31.5M pounds shipped to the U.S. Jalisco now represents 16.7% of Mexico's shipments. Mexico continues transitioning between crops, with 84% of current harvest volume coming from the Off-Bloom crop, which is clean, peaking on 48s and 60s, and averaging 25% dry matter. The Main Crop is averaging 38% dry matter. Peru's 2025 campaign is approximately 81% complete, with over 530,000 metric tons shipped globally. Arrivals remain consistent in quality, and dry matter is holding around 25%, with week 31 harvest volume at 6.1M pounds. California's crop continues to show excellent quality, with availability expected through early fall. Colombia's Travesia crop is winding down, with 2-3 weeks of volume remaining and the next harvest expected to begin in late August or early September from lower-altitude regions..

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. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to counties that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

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. We will see an additional 5% reciprocal tariff applied to this category over the coming weeks as the Federal Government implements additional tariffs to counties that have not finalized trade deals; this is still very fluid this week and will provide updates as soon as possible.

Table Grapes: Now in full production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties.

BERRIES

Strawberries: Production continues to slow across the Salinas/Watsonville region as we move past peak volumes and into the seasonal decline. Overall volume is expected to continue dipping through August, with the Santa Maria and Oxnard fall crops set to begin in September. Quality remains good, though recent wet and foggy mornings have led to increased reports of bruising and decay. QA teams are staying vigilant, and harvest crews are removing sub-par fruit in the field to maintain premium pack standards. Fruit is showing full color, medium to large sizing, and continues to eat well.

Raspberries: Production continues in Central Mexico (CMEX), Baja, and Watsonville, CA. Both CMEX and Baja are seeing steady production with good quality. In Watsonville, volumes are declining as the region moves into a seasonal supply gap, though a rebound in volume is expected by late August to early September. California raspberry quality remains excellent, with sweet, aromatic, full-red berries that are eating exceptionally well..

Blueberries: Production is ongoing in Central Mexico (CMEX), Oregon, and Washington. CMEX volume is expected to ramp up throughout August, while the Pacific Northwest regions are now past peak production. Rain is in the forecast for several growing areas in Oregon and Washington this weekend, which may impact quality. Early imports from Peru are anticipated in the coming weeks. Overall supply is steady, and quality remains very good.

Blackberries: WATCHLIST Production is ongoing in both Central Mexico (CMEX) and Oxnard, with Oxnard expected to continue through early September. CMEX volume is projected to increase steadily heading into the fall. Production in Baja and Watsonville has not yet begun. Watsonville is set to start in a very limited way next week, with gradual increases expected, while Baja will begin in late August and run through mid to late September. Overall supply remains very limited, and quality varies by region. Some reports of softness, leakers, and color reversion (red cell) have been noted, though pack outs are still grading well overall. Demand is currently exceeding supply, and pricing is expected to remain elevated over the next several weeks until volume improves.

CITRUS

Limes: WATCHLIST We are talking with our grower partners and expect to see some hurdles with lime supply out of Vera Cruz, Mexico over the coming weeks. A series of storms has hit Central Mexico which will impact the maturity of fruit as well as quality; most of the new crop fruit is still very tender, leaving the skin susceptible to defects such as Styler and decay. A result of this will be higher yield losses in the field which will impact the pick out at the border, we will start to see delays and distributors being held to their averages. Please be sure and plan ahead to avoid delays or shorts where possible. We may also need to see more flexibility in sizing. We appreciate your patience during these trying times and will keep you posted as more information comes our way.

WEST COAST LETTUCE

Iceberg: ESCALATED Lettuce quality and supplies are okay. We are still seeing lighter weights and increased demand. There have been some reports of INSV, but they have been minimal so far. There is some light to moderate levels of sclero, fusarium and thrip damage. There have been lower yields from the smaller framed lettuce heads and increased disease pressure in the fields. Some growers are holding to averages. The market is once again escalated.

Iceberg VA: ESCALATED Quality and supplies look okay. Some growers are holding to averages.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Improving supply will become available in the west as the coastal mountain plantings are slowly ramping up while east coast shippers are seeing improved volume on summer production. Quality is good and will continue to improve over the coming weeks.

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: ESCALATED Supplies are generally good across most varieties out of Mainland Mexico, Baja and California this week. Tomatillo and Red Fresno are the tightest this week; Red Fresno being so tight for the coming weeks we recommend subbing to red jalapeno.

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.

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

Romaine VA: Quality and supplies are okay, but we are keeping an eye on insect pressure and the weather. Some growers are holding to averages and the market is now escalated.

Romaine, Romaine Hearts: ESCALATED Romaine and Romaine heart quality and supplies are okay. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Organic Romaine Hearts and Romaine Heart 12/3 and 7/6 are triggered.

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 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.

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

Pickles: Light supply expected over the coming week out of Michigan and Tennessee. Quality is good.

Green Beans: Supply and quality were mixed this week and demand was light as most growing regions deal with weather-related pressure.

French Beans: WATCHLIST While production remains strong out of Guatemala, quality and shelf life have been impacted by recent rain and heat. We are still seeing container delays. There is a fair supply of French beans from Mexico.

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

HERBS

WATCHLIST Basil quality has improved out of both Colombia and Mexico, providing some relief to recent challenges. Tarragon production has been impacted by weather, and supply is expected to remain low for the next two to three weeks. Imported chervil continues to arrive in low volume from Ecuador, keeping availability limited.

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 multiple districts including California, Arizona, Michigan, Illinois, North Carolina and Missouri. Quality is outstanding.

Golden Honeydew: Good supply available on 5 and 6J's; quality is outstanding.

Honeydew: Honeydew production has leveled off and the crop is producing a fair distribution of 5's and J6's; 8's are very limited. We do expect supply and sizing to remain stable for the next several weeks. Quality is excellent; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dewes are mostly in the 14-16% range.

MIXED VEGETABLES

Artichokes: Quality and Supply are good.

Asparagus: EXTREME Baja and Guanajuato production continues to be low due to transitions and seasonality. Peruvian production remains low due to cooler weather. Sizing from all regions is predominantly small and standard, with very few, if any, of the bigger sizes. Markets are very active with less supply and sizing issues. Markets are expected to remain higher through the end of the month.

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

Broccoli/Broccoli Crowns: ESCALATED Quality and supplies are improving. Insect pressure (diamond back moth) has been reported and is affecting yields. MX still has extreme shortages. The market is no longer escalated, but some growers are still holding to averages. Organic Broccoli is still triggered.

Brocolini and Sweet Baby Broccoli: WATCHLIST Quality and supplies are good.

Brussels Sprouts: EXTREME Supplies are still tight. Insect pressure and internal browning have been reported. Salinas is now up and running and has offered some relief, but the market is still at the Extreme Trigger. We should see the market slowly start to ease up.

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: Quality and supplies are good. Organic Cauliflower is escalated.

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. We have been seeing prorates.

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: The 2024-2025 California Garlic season is ending, and the California Garlic crop has begun, so you should expect to see some improvement in supply as they move into this harvest. Quality remains good although availability will be held to current commitments until the growers have had enough time to evaluate this crop.

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 Quality on Guatemalan snow peas and sugar snaps remains unchanged, with improved volume expected in about two weeks, weather permitting. Peruvian production continues to be steady, although quality has been fair. Domestic supply of snow peas and sugar snaps remains 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 Colorina 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): Lighter supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

California: Strong production out of the valley should continue. 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 Otay. Medium sizes are short as demand has increased due to a lack of domestic round supply this week. 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 and Grape Tomatoes: Good supply and weak demand have put downward pressure on price. Quality is good.

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

Medley Mixed Tomatoes: Lighter volume this week available through McAllen and Otay. Quality is mostly good.

Tomato on the Vine: Stable Volume available this week.

OTHER FRUIT:

Apples: Red Delicious apples have good availability across all sizes and grades, with a steady market expected to carry through until the new crop begins around the second week of September. **Golden Delicious** supplies remain available in most sizes and grades, though some growers are nearing the end of their season. Availability should continue for another month or two, though tightening supply may lead to firmer pricing. **Gala** apples show strong availability across all sizes and grades, with the market holding steady and supply projected to last until new crop harvest in mid-August. **Fuji** remains well supplied in larger sizes and higher grades, with steady markets expected through September. **Pink Lady** apples are solid in both supply and quality, though a brief gap may occur prior to the new crop harvest in October.

Honeycrisp is experiencing tight supply across all sizes and grades; most USXF/WAXF #2 fruit has finished for the season. The market continues to strengthen, and a short gap is anticipated before new crop availability resumes in August.

Granny Smith apples are in good supply across all sizes and grades, with steady markets expected to continue until the early September harvest. On the organic side, Gala, Fuji, Pink

Lady, and Granny Smith apples are available in very limited volumes across most sizes and grades, while Honeycrisp is mostly finished until the new crop returns in August.

Pears: D'Anjou availability is tight and primarily limited to US #1 grade fruit. The market remains stable, with supply expected to continue until new crop Bartletts arrive in August.

Red D'Anjou pears are moderately available in US #1 35-55ct sizes and should remain in the market for another month, with new crop **Starkrimson** pears expected to start mid-August. Both **Bartlett** and **Bosc** pears are currently gapping until their respective new crop harvests in mid-August and early September.

Pomegranate: Limited availability.

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

Cherries: Season is done and has transitioned to Washington.

Stone Fruit: New crop Peaches, Nectarines, Plums and Apricots now available out of California. Peaches are now available in South Carolina and Georgia as well.

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

Quince: Limited supply available this week.

DAIRY:

- Not much for new data, markets were generally softer globally, slightly stronger in US.
- U.S. cheese and butter stocks were still below year ago in June.
- EU production has held up better than expected despite hot/dry start to summer.
- NZ production forecast raised to +2.0% for '25/26 season.

BEEF:

Massive packer losses of approximately \$300 per head are expected to keep production numbers constrained. With boxed beef cutouts falling and cattle prices continuing to rise, packers have little choice but to limit harvest levels. However, this strategy has yet to successfully rein in live cattle costs, and its future effectiveness remains uncertain. If cattle supplies are truly fixed—as most analysts suggest over the next 18 months—then boxed beef prices will eventually need to move higher to ration limited supply. In the meantime, packers will remain under significant financial strain. Product availability remains extremely tight across the board. After Labor Day, the Choice cutout is expected to trend lower, but technical support is seen in the \$340–\$350/cwt range.

In the current week:

- Rib prices are climbing amid tight supplies and strong demand.
- Loins remain steady, but could see support as buyers seek more affordable steak options for Labor Day ads.
- Outside cuts and grinds are holding steady for now but may appreciate as Labor Day approaches.
- Cattle prices are called steady to higher this week.
- Cattle futures moved sharply higher on Tuesday.

The boxed beef market in a general sense has bottomed and will move higher through Labor Day.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS – Prices are trending barely steady to weak for WOGS ; steady for whole fryers. Supplies are available for 3-4 pound sized wogs. Demand is light. Floor stocks are fully sufficient. Market activity is slow. In the parts sector, prices are trending steady to firm for b/s breasts; steady for wings; steady to weak for tenders and dark meat cuts and weak for fronts and bone-in breasts. Supplies of b/s breasts are light to moderate with jumbo and medium sizes in the better balance; moderate to heavy for tenders and dark meat cuts; bone-in breast and fronts are available slow in clearing. Demand is light to moderate. Market activity is moderate to slow.

EXPORT MARKET – Export demand is moderate.

SHELL EGGS:

National FOB shell egg weighted average prices are mostly steady to lower. The undertone is weak. Retail and loose egg movement ranges light to moderate. Offerings are moderate to instances available. Supplies are moderate to fully adequate. Market activity is moderate to slow. California weighted average delivered prices are only lightly tested on Large with the balance untested. Demand into retail and food service channels is light to at times moderate. Distributive buying interest is as needed only. Offerings are light to generally moderate. Supplies are moderate to fully adequate. Market activity is slow to moderate.

PORK:

We would expect pork items to attract above average interest for Labor Day retail ads. Pork remains a huge value when compared to beef and ribs are a fantastic way to finish up the summer grilling season. This week hams demand from Mexico is supportive to prices. Bellies are called steady as are loins and the trim complex. Ribs and butts should move higher as we approach Labor Day.

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 on frozen commodity 8-16 lb. hens and 16-24 lb. toms at 149-172 cents fob for current shipments. Fresh hen and tom November offerings light. Trading slow on frozen basted equivalent 8-16 lb. at 154 and 16-24 lb. toms 154-155 cents FOB for current deliveries.

The market on tom breast meat and destrapped tenderloin market is firm. Demand 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 with interest a touch slower at the higher price levels. The consumer sized breast market is steady to firm. Demand and offerings light. Institutional sized breast markets are steady with a firm undertone. Demand light to moderate. Offerings light. The frozen tom and hen bulk parts markets are steady to firm with some not seeing the strength others are on tom necks. 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 and livers steady, defatted gizzards steady to weak. Demand light. Offerings light to moderate. Mechanically separated turkey market is steady to firm, mostly steady. Demand moderate to good. Offerings short to light. Trading slow.

EXPORT MARKET HIGHLIGHTS – Trading slow. Market steady to firm. Demand moderate to good. Offerings short to light.



Fresh Is Everything

630-665-9665