Fresh Is Everything

Weekly Market Review
September 12, 2025

Overview

The **Tomato** market this week is split: the Roma supply out of Mexico is very short with high demand while the rest of the category remains flat, both import and domestically. A combination of weather, Transition starting and government updates for importing procedures are the main culprits behind this uptick. We are watching a tropical storm that will make landfall in Baja this week and could impact the later part of the Baja growing cycle. It's too soon to assess or assume anything but we are keeping a close eye on its development and movement. Domestically production remains stable, and quality is fair out of Tennessee, Alabama and Virgina. Grape Tomato supply is good out of all regions as are other varieties in the snacking category. California production is mixed, and quality is good with fair demand.

Grape season continues to be into excellent production and quality; we should see steady markets now through late October. **Melon** supply out of Firebaugh is starting to slow down slightly as we are now on the backside of the California deal; days are getting shorter, and local deals will wind down as well. Quality is outstanding. **Banana** and **Pineapple** availability remains limited; shippers are asking we continue to be flexible on Pineapple sizes in particular.

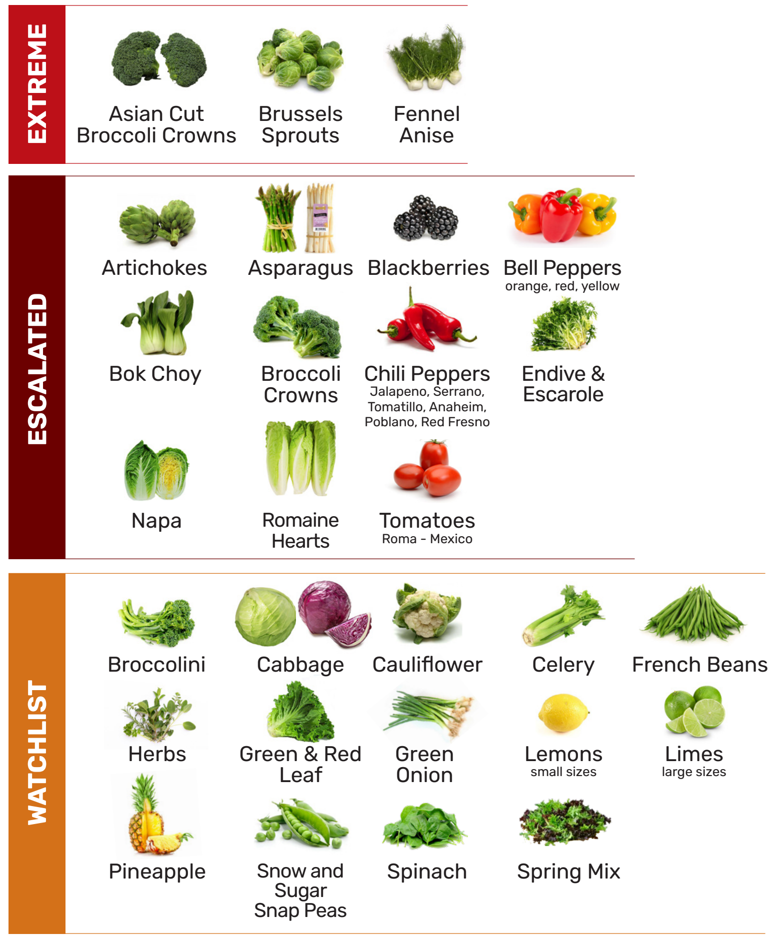
Pumpkins and Fall items will be available this week.

Avocado supply remains stable, with strong availability across medium, large, and jumbo sizes, and pricing continues to support promotions driven by steady volumes from Mexico. California production is tapering off as the season winds down, with harvests expected through October, while Peru is entering its final weeks, with last arrivals scheduled over the next three to four weeks. Large and jumbo fruit from Peru should remain available at promotable prices during this period, and with overall supply projected to remain robust for several weeks, market conditions present an excellent opportunity for promotions.

Temperatures have cooled a bit in Salinas but the warm weather from the past few weeks will have an impact on supplies. The warmer weather brought on insect pressure and also caused rapid growth on some of the commodities. Insect pressure and INSV continue to be reported in the fields for **Lettuce, Romaine, Leafy Greens, Cauliflower** and **Broccoli**. The Lettuce market is no longer escalated but there are limited supplies. We are still seeing lighter weights and lower yields due to smaller heads, soil diseases and increased insect pressure. You will notice that lettuce is less dense during this time. Weights will be light. Growers are covering averages when they can. We have seen some prorates, but quality is still good. The industry is expected to see lighter Lettuce supplies for at least the next few weeks. The fields have already been stressed and with the heat now being a factor, we may see issues with lettuce continue throughout the month. Romaine Hearts are still escalated. Fringe burn and INSV are present in some fields. Broccoli is still escalated, and we are seeing issues with supplies. We are seeing heavy insect pressure, and the cooler weather will slow growth. Some growers are holding to averages and some have had to prorate due to the loss of acreage.

The Diamond back moth has shown up early this year and is expected to affect supplies throughout the Salinas season. MX growers still expect some supply issues but have seen increased supplies. Quality still seems to be good but with reports of increased insect pressure, quality issues could arise. **Brussels Sprouts**' quality and supplies are continuing to improve. The market is back to the extreme level but that is being driven by low yields for some growers. **Fennel/Anise** are still at the extreme level. Supplies continue to be very tight. **Artichokes** are also once again escalated. Sizing is small and growers are holding to 8 to 10-week averages. **Bok Choy** and **Napa** remain escalated.

MARKET ALERT



Summer always brings quality and supply issues, and we can expect things to be a bit of a roller coaster for the next few months. The **Valencia** season is beginning to wind down for some shippers, while others expect to continue harvesting for another eight weeks. Overall, we are seeing a good supply of 113s and larger, with fewer 138s available. The quality and flavor profile of the fruit is still looking great overall. Be aware that some shippers may be looking to hold to averages in the coming weeks.

Choice **Grapefruit** is readily available, but most growers are requiring ample lead time for Fancy Grapefruits. Growers have fully transitioned into Pink Grapefruit.

As we push towards the end of District 2's season, things are continuing to remain tight on small **Lemons** (165 and up) and most shippers are continuing to hold to averages. Size structure is peaking at 140/115ct choice. District 3 will hopefully be our light at the end of the tunnel and will give some relief on this strain, but small lemons are projected to remain tight into October. You will have to load import fruit in the east for smaller sized lemons, which is still subject to availability. District 1 preliminary evaluations are underway, with an early October start anticipated for the season. District 2 is in its final two weeks of significant harvest, and overall fruit integrity has been strong this year. Seasonally cooler weather through the summer allowed fruit to remain on the trees longer than usual. Final cleanup picks are expected in early October. District 3 harvesting began this week in Coachella Valley.

OVERVIEW - CONTINUED

Fruit is showing good internal quality with medium to large sizing. Picking is expected to ramp up gradually through September, with a peak anticipated in late October. The global Lemon market remains strained, and small fruit is extremely limited. In Mexico, early harvest is now underway, with weekly shipments climbing into the 20,000s and expected to increase substantially in the coming weeks. While fruit is still maturing, sizing is trending toward 140s, 165s, and 200s, with grade currently leaning more toward Choice. Argentina continues to ship significant volume to Europe and Russia, with 5.1 million cases sent to Europe alone, a 100% increase over total volume shipped in 2024.

Peak sizes remain between 95s, 115s, and 140s. While overall quality has improved compared to last season, it varies by supplier. U.S. shipments are expected to wrap up next week, nearly two months earlier than last year. Chile has shipped close to 2 million boxes to the U.S. so far, with pack outs primarily being 115s, 140s, and 165s. Approximately 70–80% of the crop grade is Fancy. Total volume is projected to increase by about 5% over last year, reaching an estimated 21–22 million boxes. In recent weeks, Chile has averaged 115,000 – 175,000 cases per week into the U.S., with 70% of that headed to the East Coast. This pace is expected to continue as shipments to Asia and Europe remain strong. The California Garlic crop is in full swing, 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: Overall markets remain steady, with the U.S. avocado industry closing last week at 62.5M pounds, a 3.1% week-over-week increase. Out of Mexico, harvest totaled 49.5M pounds in week 36, with 47.4M pounds shipped to the U.S., and Jalisco accounting for 14.8% of that volume. The Off-Bloom (Loca/Mendez) crop now makes up more than 99% of harvest activity, averaging 26.3% dry matter and peaking on 48s and 60s. Peru's 2025 campaign is approximately 95% complete, with 9.1M pounds shipped to the U.S. and arrivals expected to finish in the coming weeks, primarily focused on larger sizes. California harvested 4.9M pounds in week 36, with dry matter averaging 31% and sizing also peaking on 48s and 60s; harvest has flattened, but quality remains excellent, and supply is expected to continue through October.

Bananas: Banana supply remains stable despite strong demand for school business rapidly ramping up. Overall, banana quality has been very good.
Table Grapes: Now in full production out of California; quality and supply are stable on Flames, Sugraones and Ivory varieties.
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.

BERRIES

Strawberries: Overall supplies are steady but remain on the lighter side. All growing regions experienced hot weather last week, with daytime highs reaching the mid to upper 80s. In Watsonville, warm conditions are expected to persist for several days, with next week's forecast calling for highs in the low 80s early in the week before cooling to the high 70s, while nighttime temperatures hold in the mid to upper 50s. Santa Maria is projected to see daytime highs in the mid to upper 70s with nighttime lows in the 50s; volume there remains limited but should increase by the third week of September. Oxnard will trend slightly cooler, with daytime highs in the low to mid 70s and nighttime lows in the low 60s, and volume is also expected to improve by the third week of September. Quality challenges such as overripe.
Raspberries: Production is ongoing in Central Mexico (CMEX), Baja, Oxnard, and Watsonville, California, with all regions remaining steady and quality holding strong. Raspberry quality out of Watsonville is performing particularly well, with fruit showing excellent color, sweetness, and aroma.

Blueberries: Production continues in Central Mexico (CMEX) and Washington, though volumes from the Pacific Northwest are declining as the season winds down. Imports from Peru are experiencing delays, and supplies are expected to tighten quickly through September and October. Pricing is projected to rise accordingly, with limited availability anticipated in the weeks ahead.
Blackberries: **ESCALATED** Production is currently active in Central Mexico (CMEX), Oxnard, and Watsonville, with Oxnard winding down and expected to finish by early September as volumes taper. CMEX is steadily increasing output each week heading into the fall, while Baja is scheduled to begin harvest in the second week of September. Watsonville is harvesting twice per week, contributing to overall supply improvements, though quality remains inconsistent across regions, with reports of color reversion and softness in some lots.

CITRUS

Limes: **WATCHLIST** Supply is extremely tight this week on all sizes with larger sized fruit being the shortest. We do expect to start subbing sizes anytime soon for the larger side of the scale as old crop availably continues to decline. The short-term forecast is lighter supplies through September, and pricing is to continue an upward trend for the coming weeks.

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.

WEST COAST LETTUCE

Iceberg: **ESCALATED** Lettuce quality is okay, but supplies are limited. The market is no longer escalated but we will continue to see lighter weights. We are still seeing signs of INSV. 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 and we have seen some prorates. Growers are also subbing labels to try and cover orders when possible. The soil borne diseases have really limited the harvestable acres. You will see smaller heads, and they will not be as dense as they normally are. The market is very active and will be a roller coaster over the summer as growers try and navigate the issues with the yields.

Iceberg VA: Quality and supplies look okay. Some growers are holding to averages and we have seen some prorates.

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.

Romaine, Romaine Hearts: **ESCALATED** Romaine and Romaine heart quality are okay, but supplies are light. The market is still trending higher due to increased demand. There have been some reports of fringe burns and light cupping. Insect pressure, sclero/INSV have been reported. Some growers are holding to averages. Romaine Hearts and Organic Hearts are all still escalated.

Green Leaf and Red Leaf: **WATCHLIST** Quality is good, but supplies are a bit light. We have seen mildew and fringe burn pressure. We are seeing lighter carton weights.

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: Steady supply available from all growing regions Quality is good.

Color Bell Pepper: **ESCALATED** Supply is finally improving, and markets continue to adjust downward; we may see a few shortfalls in eastern open field production but overall expect excellent quality and minimal shortages. Canada and Mexican production will remain steady on 11# as well and import quality is very good.

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

Mixed Chili Pepper: **ESCALATED** Supplies are tighter this week out of Mexico generally good across all categories due to a mix of heat and rain over the past several days. Red Fresno is the tightest this week and recommend subbing to red jalapeno when needed. California's quality is also compromised a bit by heat related pressure this week out of the central valley.

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: Light supply available this week. Quality is good.

Pickles: Light supply expected over the coming week out of Canada, 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** Guatemala production remains good overall, though minor quality issues are being reported due to heat and shipping delays. Supply of conventional French beans out of Mexico is fair.

Zucchini/Yellow Squash: Steady supply will continue out of the east as well as west. Quality is good.

HERBS

WATCHLIST Basil quality and supply remain strong out of both Colombia and Mexico. Tarragon production continues to be light, and mint volumes are lower than normal due to recent weather challenges. Imported chervil from Ecuador remains limited, and supply on marjoram is also tight due to weather-related impacts. Out of the West, supply is steady across most herb varieties, though chervil and marjoram remain exceptions. Heat continues to pose a risk to overall herb quality, which may be inconsistent in some cases.

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

Cooler temperatures as well as some scattered showers have slowed down production as we are past the peak in the California season. Regional melon deals are also starting to wind down pushing more demand west which will tighten overall availability over the coming weeks, however, expect no interruptions in supply through transition.

Cantaloupe: Cantaloupe pricing has started to trend higher, especially on larger fruit. The primary sizing over the past week has been reg 9/12s with even some 15s being packed. This sizing profile should continue for the next 7-10 days. Overall quality remains strong. Netting has been consistent, and the shell color remains high. Internal quality has been very good with higher brix levels, mostly 14-16%, and we have had excellent eating fruit.

Watermelon: Watermelon volume has started to firm up as local deals wind down for the season. Still seeing fruit available in several districts but that will gradually decline as the weather cools across the country and fall approaches. Quality remains strong.

Golden Honeydew: Just about done for the season very limited availability this week.

Honeydew: Honeydew production has started to taper off and size distribution is leaning heavy to 6's; 8's are very limited. Quality is excellent; mostly clean shell, we are seeing occasional scarring on these first picks. Brix levels on the dews are mostly in the 13-15% range.

MIXED VEGETABLES

Artichokes: ESCALATED Quality is good, and supplies are limited. Growers are holding to averages and there may be some substitutions on sizes.

Asparagus: ESCALATED Baja production remains limited due to seasonal transitions, while Peruvian volumes are also low as cooler weather slows growth. Conditions are expected to improve within the next 10 days as additional fields in southern Peru begin to open. Current sizing trends are skewed toward small and standard fruit, with only limited availability of larger sizes. Markets remain active, supported by reduced supply and ongoing size limitations.

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

Broccoli/Broccoli Crowns: ESCALATED Quality is improving but supplies are limited with some growers. Insect pressure (diamond back moth) has been reported and is affecting yields. The insect pressure is limiting harvest. MX still has extreme shortages. The market is still escalated, and the Asian Cut Crowns are at the extreme trigger. Some growers are already holding to 8 to 10-week averages. Organic Broccoli is still at the extreme trigger.

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

Brussels Sprouts: EXTREME Supplies have improved but we still have some growers struggling with yields. Insect pressure and internal browning continue to be reported but quality is improving. We are also seeing some elongated stems due to the rapid growth from the heat. The market is back to the extreme trigger. We should see supplies start to improve over the next few weeks.

Carrots: (JUMBOS, MEDIUMS and CELLOS) Growers are still harvesting in Monterey County and Kern County district. Supplies are steady and the size on jumbos is good right now. Quality is good and should get even better as growers move forward into Lancaster and Cuyama. They will harvest there through November. When we look at the MX carrots, MX carrot volumes are decreasing due to natural seasonality as well as local markets emerging from Canada this time of year. Production remains the strongest in Guanajuato and Puebla and will start to lean more to Puenla as the year progresses.

Cauliflower: WATCHLIST Quality and supplies are good, but the market is firming up. Organic Cauliflower is escalated. .

Celery: WATCHLIST Quality is good right, but supplies are tightening up.

Corn, Sweet: Markets are mostly steady this week and we should see this continue through the remainder of the local seasons. 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: Leeks are no longer escalated, Quality and supplies look good.

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: WATCHLIST Supplies are okay, and quality looks good, but we are seeing poor yields in the VA cabbage as growers are trying to limit the core in the finished product. .

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

Mushrooms: Lighter volume available due to transitions and production forecasts that were made below actual demand. 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: WATCHLIST Quality looks good, but supplies are light.

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 Supply and quality of Guatemalan snow peas and sugar snaps remain good, while Peru continues to provide steady volumes with fair quality. We are still seeing vessel delays in the east, which may affect quality. Domestic production is limited, with only fair availability and quality reported. Prices out of the western regions remain elevated due to supply issues.

ONIONS:

The onion market is expected to remain stable throughout Q4. With harvest concluding, all product will ship exclusively from storage in the Pacific Northwest. While we may see a modest increase occur, no significant market movement is anticipated. The Northwest outlook remains steady, and any potential changes are unlikely to occur during Q4. Overall, supply, quality, and pricing should continue to favor buyers, with plentiful availability expected barring unforeseen disruptions.

POTATOES:

Potato supply in for the remainder of the year will be fully supported by storage shipments, with no major challenges anticipated. Sizing and overall availability are expected to be strong across all categories. Burbanks will begin to ship in limited volume in mid-October, though Norkotahs will continue to make up the majority of the supply. The long-term outlook mirrors last season, when the market remained relatively soft until late spring, at which point tighter supply led to higher FOB pricing.

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 Tomatoes: Supply slower to improve out of Alabama, North Carolina and Tennessee while new production starts in Virginia and New Jersey. Current quality will be mixed; several days of heat, rain and high humidity are causing several post harvest issues days after the fruit is packed.

Roma Tomatoes: Volume is gradually increasing and pricing was mixed this week based on location. Quality is fair and slowly improving.

Snacking Tomatoes (Cherry, Grape and Medley): Lighter supply available as we emerge from fields that were impacted by rain. Quality is gradually improving.

California (Rounds and Romas): Improving production out of the East Valley and Gilroy this week. Crop conditions appear to be much stronger than central valley production. Overall quality is good.

MEXICO

Round Tomatoes: Volume is steady crossing through McAllen and Otay. Quality is excellent.

Roma Tomatoes: ESCALATED We are seeing significantly higher markets this week as production is off significantly. A combination of weather, transitions starting and government updates for importing procedures are the main culprits behind this uptick. We are watching a tropical storm that will make landfall in Baja this week and could impact the later part of the Baja growing cycle. We will continue to observe these impacts but do hope to see some improvement over the next ten days.

Snacking Tomatoes:

Grape: Good supply and weak demand have put downward pressure on price. Quality is good.

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

Medley Mixed Tomatoes: Good supply crossing 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: Steady supply out of Washington, New York and Canada.

Stone Fruit: New crop Peaches, Nectarines, Plums available out of the PNW. East coast supply will continue decreasing and wrap up very soon for the season.

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

Quince: Limited supply available this week.

DAIRY:

It's the same story as last week. Prices were generally weaker across all the major exporters. Whey products have a little more support than the other dairy commodities, but it's hard to get real bullish on anything right now. The growth in weekly milk collections in Europe has slowed a little but it still looks like production is up from last year. We're pushing U.S. milk futures down to break even for U.S. farmers (around $17.00 Class III/IV), but we're likely still looking at strong production growth at least through the end of the year and likely through Q1. We either need to see weather/disease disrupt production or we need stronger demand to develop somewhere.

SHELL EGGS:

National FOB shell egg weighted average prices are mixed. The undertone is generally steady. Retail demand is in a range of light to instances fairly good, best where promotional activity is in place. Loose egg movement is light to moderate. Offerings are moderate to available. Supplies are varied. Market activity is moderate. California weighted average delivered prices are not well tested. The undertone is steady to weak. Demand into retail and food service channels is light to seasonally moderate. Offerings are moderate to available. Supplies are moderate. Market activity is slow to moderate.

BEEF:

Cattle futures tumbled Tuesday, dropping 2–3% as commercial funds liquidated long positions. Most analysts had anticipated a pause in bullish momentum post–Labor Day, and we may be seeing that correction play out now in the cattle markets.

Lower live cattle prices could encourage a larger weekly harvest in the near term, though it's important to remember the tightest cattle supplies are still ahead.

On the cutout side, top sirloins and thin meats are moving lower seasonally as summer grilling fades. Ribs and tenderloins remain steady, while grinds and outsides are trading within slightly wider ranges.

PORK:

Pork butts remain a strong contributor to the pork cutout, with demand for both bone-in and boneless product still robust. Ribs appear to be drawing some freezer interest, while trim supplies are relatively tight following last week's short kill. Looking ahead, loins and butts are likely to see stronger retail featuring toward the end of September and throughout October—National Pork Month.

Hog harvest is running about 3% below year-ago levels, with weights tracking close to last year. Together, these factors are contributing to lower-than-expected production. As noted in last week's update, ham prices are projected to remain historically strong this fall, supported by reduced production and limited cold storage inventories.

CHICKEN:

DOMESTIC MARKET HIGHLIGHTS – Prices are trending steady for whole fryers; steady to weak for WOGS. Supplies are moderate to heavy for 3-4 pound sized WOGS; moderate for the balance. Demand is light to moderate. Floor stocks are sufficient. Market activity is slow to moderate. In the parts sector, prices are trending steady at best for fronts and bone-in breast; steady to weak for dark meat cuts with drums, legs, leg meat and thighs noted as available and slow in clearing. B/S breasts, tenders, and wings are weak. Supplies of wings and dark meat items are moderate to heavy; tenders and b/s breasts are burdensome. Demand is light to moderate. Market activity is slow to moderate.

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. Fresh and frozen Grade A 8-16 lb. hens and 16-24 lb. toms demand light to moderate. Offerings short to light on frozen commodity 8-16 lb. hens 153-172 and 16-24 lb. toms at 153-172 cents fob for current shipments. Fresh hen and tom November offerings light. Trading slow. Frozen Grade A 2025 production 8-16 lb. hens and 16-24 lb. toms 156 cents FOB and 2024 production 8-16 lb. hens 153155 cents FOB for current shipments.

The market on tom breast meat and destrapped tenderloins is firm. Demand good. Offerings short to light. The market on white trim 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 to firm. Demand and offerings light. Institutional sized breast markets are steady to a firm. Demand light to moderate. Offerings short to light. The tom bulk parts markets are mixed on fresh tom necks, balance steady to firm. Demand light to good, mostly moderate to good with fresh tom necks mixed. Offerings short to light with fresh tom necks light to moderate. The hen bulk parts market is steady to firm. Demand moderate to good. Offerings short to light. The thigh meat market is firm. Demand moderate to good. Offerings light. Hearts and livers steady, defatted gizzards steady to weak. Demand light. Offerings light. Mechanically separated turkey (MST) market is steady. Demand light. Offerings light to moderate. Trading moderately heavy on frames and fresh MST, balance slow to moderate.

EXPORT MARKET HIGHLIGHTS - Trading slow. Market steady to weak on defatted gizzards. Demand moderate with less aggressive thigh meat interest at current market levels. Offerings short to light.

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