

## Weekly Market Review

### September 18, 2026

## Overview

**Tomato** production continues to fluctuate in South Carolina, Tennessee, and Virginia due to a combination of weather-related pressure and the season starting to wind down, resulting in upward pressure on the markets this week. Snacking Tomatoes remain the tightest over the coming weeks and expect to see some relief once South Georgia start in approximately 12 days. Mexico's production of Rounds and Romas remains steady; grapes will be lighter this week due to transitioning to new blocks. Mexican growers expect stable production over the next few weeks and good quality, demand will be strong with a deficit out of the East. We are finally starting to see some relief in the Snacking Tomato market, but we still expect some challenges over the next week. In California, Tomato production remains steady, but demand is much higher.

The **Lime** market will begin to see an uptick in price and volume decline. New crop will be significantly different, leaning heavily to smaller fruit. 175s and larger will remain short, making substitutions with smaller sizes necessary over the next several weeks.

**Hot Pepper** production is expected to stabilize across most varieties. **Zucchini/Yellow Squash** were both tight this week as well as slicer cucumbers.

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

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

The weather in Salinas is settling into average temperatures for this time of year, but low yields are affecting multiple items. Insect pressure, INSV, and Sclerotinia continue to impact production and are expected to remain a challenge throughout the Salinas season. Demand is increasing and supplies have become limited. Quality issues are also on the rise as disease and insect pressure continue to increase, particularly in **leafy greens, cabbage, broccoli and cauliflower**. Diamondback moth/insect pressure is heavy and is a large contributor affecting cabbage, broccoli and cauliflower supplies. Growers are expected to hold to averages on all broccoli, cabbage and cauliflower commodities when they can but prorates should be expected. **Green Onions** are also still extremely limited and will likely be prorated.

**Avocados** from Mexico saw an increase in production last week, increasing volume into the US by 12 million pounds. The increase was needed to offset the expected lower volume from harvesting crews shutting down for a Mexican national holiday. California and Peru volumes are decreasing but still adding vital supplies to the market. The size curve out of Mexico, California and Peru favors 48ct. 60ct and smaller have become tighter and we have seen an increase in price.

|           |                                                                                    |                                                                                      |                                                                                      |                                                                                      |                                                                                      |                                                                                     |
|-----------|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| EXTREME   |   |   |   |   |                                                                                      |                                                                                     |
|           | Artichokes                                                                         | Asparagus                                                                            | Brussels Sprouts                                                                     | Cauliflower                                                                          |                                                                                      |                                                                                     |
| ESCALATED |   |   |   |   |                                                                                      |                                                                                     |
|           | Cilantro                                                                           | Green Onion                                                                          | Lettuce                                                                              | Strawberries                                                                         |                                                                                      |                                                                                     |
| WATCHLIST |   |   |   |   |   |  |
|           | Broccoli Crowns                                                                    | Broccolini                                                                           | Cabbage Green                                                                        | Green/Red Leaf                                                                       | Limes 150's & larger                                                                 | Romaine Hearts                                                                      |
|           |   |   |   |   |   |                                                                                     |
|           | Spinach                                                                            | Squash                                                                               | Sugar Snap & Snow Peas                                                               | Tomatoes Rounds, Romas, Snacking                                                     | White Asparagus                                                                      |                                                                                     |
|           |   |   |   |   |                                                                                      |                                                                                     |
|           | Blackberries                                                                       | French Beans                                                                         | Herbs                                                                                | Potatoes                                                                             |                                                                                      |                                                                                     |
|           |  |  |  |  |  |                                                                                     |
|           | Raspberries                                                                        | Romaine                                                                              | Small Citrus all varieties                                                           | Spring Mix                                                                           | Sweet Potatoes                                                                       |                                                                                     |

**Cantaloupe** and **Honeydew** demand has increased while we also are seeing a reduction in production causing pricing to increase. As we start to transition into the Fall season, we will start to see lighter color and smaller fruit. Some growers are starting to see signs of virus presence, which could impact supplies in the coming weeks.

**Berry** supplies remain limited as California production declines, Mexican volumes remain light, and the Pacific Northwest season winds down. Quality is generally good, although heat-related softness, bruising, sunburn, leaking, and smaller fruit are being reported in some growing regions. Near-term availability is expected to remain tight as domestic production continues to decline, and imported supplies gradually increase. Overall conditions should begin improving in October as production from Mexico and Peru builds.

**Citrus** markets are experiencing tight supplies of smaller sizes across many varieties, including **Lemons** and **Oranges**, with fruit generally trending larger. California Valencias are in full swing. Some suppliers are reporting seasonal supply challenges with Oranges, with some needing to substitute imported fruit for smaller sizes to fulfill contracts. **Grapefruit** supplies are a mixed bag with some suppliers anticipating a potential gap in supplies and others sitting comfortably. Be in close contact with your supplier on this matter.

## FRUITS & VEGETABLES

**Avocados:** Mexico sent 56.1 million pounds to the U.S. last week; the average dry matter is 27%. California harvested 2.7 million pounds and has an average dry matter of 29%. Peru sent 5.0 million pounds with dry matter around 25%.

**Table Grapes:** Production is stable out of California, and fruit quality is outstanding, with good-sized berries, very little shatter, and high Brix. Current production is ideal for summer, with varieties including Flames, Scarlett Royals, Allisons, Ivory, Timson, and Summer Royals. We will need to keep a close eye on the market as the season progresses, as the crop is approximately two weeks ahead and there may be supply issues on the back end of the season. Black grapes will start to decline over the next 3-4 weeks.

## BERRIES

**Strawberries: EXTREME** Strawberry availability remains limited following extreme heat across California. Santa Maria volumes are expected to recover gradually, while Watsonville and Salinas production continues to decline week over week. Quality ranges from good to fair, with bruising, softness, sunburn, and smaller fruit being reported. Tight availability is expected to continue over the coming weeks.

**Blackberries: WATCHLIST** Blackberry availability remains limited across Mexico and Watsonville, with California heat further restricting harvests and affecting fruit condition. Mexican quality remains good despite unfavorable weather, while Watsonville quality is mixed, with some softness and reduced shelf life reported. Watsonville volumes should remain limited through mid-September before improving from late September into early October. More significant relief is expected as Mexican production increases during October.

## CITRUS

**Limes: ESCALATED** Supply will get lighter, and markets are firming up as current regional product will decline. We will continue to see size issues with distribution will skew heavily toward 175s and 250s. Unfortunately, this is leaving larger sizes. Due to limited sizing on the larger end of the scale, we are still seeing a need to substitute with smaller sizes for the next several weeks. Overall quality will be a concern; external blemishes, oleocellosis and limited shelf life may occur.

**Lemons:** Small lemons are tightening up. Some suppliers will not take new volume on smaller sizes until supplies improve.

## WEST COAST LETTUCE

**Iceberg: EXTREME** Lettuce quality is okay and supplies are extremely limited. Prorates should be expected. There has been an increase of disease and insect pressure. We have seen some reports of internal burn, wind burn and soil-related defects. We are also seeing smaller heads and light weights. The market is trending up. September will be challenging for lettuce. Lettuce is now at the extreme trigger.

**Iceberg VA: EXTREME** Quality and supplies are okay.

**Romaine VA:** Quality is good and supplies are improving. We are still seeing more core in the bags and some mildew.

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

**Pineapples:** Supplies have tightened up, and we have seen an increase in open market pricing. Contract volume is holding firm, but open market availability has dropped. Suppliers are expecting this to last for 2 to 4 weeks. This should not affect quality, which has been good overall.

**Blueberries:** Pacific Northwest blueberry volumes are declining quickly as the domestic season winds down, with quality remaining good. Peruvian arrivals are showing excellent quality, but conventional and organic availability remains limited during September. Overall supply from Peru is gradually increasing and should help offset declining domestic production in the coming weeks.

**Raspberries: WATCHLIST** Raspberry supplies remain limited across Mexico and Watsonville. Quality is generally good, with some softness, leaking, and sunburn reported. Watsonville production is expected to remain steady through late September before declining in early October. Mexican volumes should begin increasing more significantly in October.

**Navels:** Domestic Navels are all wrapped up!

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

**Mandarins:** Import Mandarins are in full swing. Domestic mandarins will begin this November.

**Grapefruit:** California grapefruit has mixed availability.

**Boston/Butter Lettuce:** Quality and supplies look good.

**Romaine & Romaine Hearts: WATCHLIST** Supplies and quality are okay. There have been reports of tip and fringe burn. This item remains on the watchlist and is expected to escalate soon. We are seeing high core, soil concerns, and insect pressure. Yields are being affected. Baby Romaine disease pressure has also increased, and supplies will be light. Romaine Hearts are now escalated.

**Green Leaf, Better Burger and Red Leaf: ESCALATED** Quality is good, but supplies are limited.

## EASTERN AND WESTERN VEGETABLES

**Green Bell Pepper:** Supply is steady outside of California. Lighter supply out of the East due to ongoing rain and quality issues, we are seeing upward pressure on open market business. Greens in the desert are expected to start in 6 weeks.

**Color Bell Pepper:** Good supply is available out of Fillmore/Somis, Gilroy, Baja, and Tennessee this week. However, markets are expected to firm up a tad late next week on yellow. Red is flushing with outstanding quality on open-field varieties. The Hothouse Pepper category is steady out of Canada and Mexico while Open field Canadian is flushing as well.

**Jicama:** Good supply and good quality available.

**Mini Sweet Pepper:** Supply lighter this week; quality is good.

**Mixed Chili Pepper:** Supplies are stable on most varieties with steady volume crossing from Mainland Mexico, Baja and local programs in California, Mexico as well as the East Coast. Red Fresnos seem to be the shortest, and we see much higher prices per pound than normal.

**Tomatillo:** Good supply and quality available this week.

**Pickles:** Lighter supply is available out of Tennessee/North Carolina, with limited supply out of Mexico. Quality is good.

**Eggplant:** Central Valley volume is steady while local programs in the East (Tennessee, North Carolina and Michigan) were limited this week. Overall quality is good.

**English Cucumbers:** Lighter supply and higher demand are pushing FOB prices upward out of Canada and Mexico. Quality is good.

**Slicer Cucumbers:** Supplies crossing through Otay Mesa and McAllen are much improved with stable volume available. In the East, we are seeing good supply out of Tennessee and Michigan. Quality is good from all shipping points.

**Green Beans, Round Type:** New York and other local regions in the East seem to be in good production this week. In the West, Orange County and Baja supplies are limited. Quality is mixed by region. Pole beans, Kentucky Wonders and Half Runners are much higher.

**French Beans:** **WATCHLIST** Production from Guatemala has declined, and higher pricing is expected moving forward. However, French bean supplies from Mexico remain strong, helping support overall availability.

**Zucchini/Yellow Squash:** **ESCALATED** Very tight supply and higher demand have pushed pricing higher this week on Green and Yellow Squash out of Michigan, Virginia and California. We expect to see volatility in these markets over the next 2-3 weeks minimum and should see some price relief as growers break early fall blocks and production increases. Quality is good.

## POTATOES:

**WATCHLIST** Most growers are shipping new crop potatoes, and some will start adding volume into storage in the upcoming weeks. With less acreage, issues with water and high nighttime temperatures, larger 40-70 count potatoes are limited and will remain that way throughout the season. Suppliers are still hoping that potatoes will size up over the next few weeks. Smaller 80-120 count potatoes have better availability. Current market pricing remains elevated and getting stronger on bigger potatoes.

## SWEET POTATOES:

**WATCHLIST** Growers have started to harvest the new crop and will put them in storage to let the skin set before shipping. This will take 3-4 weeks before we start to see the new crop shipped out. Limited old crop supplies remain available nationwide, putting a premium on all sizes. Demand from both retail and foodservice continues to be steady to strong, supporting a firmer market. Quality has been fair to poor as we finish up the old crop.

## ONIONS:

The transition to the NW, Washington, Oregon, and Idaho is mostly done. Most California suppliers are finished for the summer season. Overall, the market is still struggling to keep up with demand, elevating open market pricing. NW suppliers are reporting less volume on colossal and super colossal sizing due to extended periods of smoke from neighboring wildfires and heat.

## HERBS

**WATCHLIST** Basil production, quality, and supply remain good across both regions. On the East Coast, all herbs, including imported chervil, are readily available. On the West Coast, most herbs have steady supplies and fair quality, although chervil, lemon thyme, and marjoram remain limited due to heat.

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

## MELONS

**Watermelon:** The market remains stable with most of the volume coming out of the Midwest. California is still producing some volume along with Mexico. Pricing is steady as suppliers get ready for one last holiday push. Quality throughout the growing regions has been good.

**Cantaloupe:** With the change in seasons coming on, growers are producing more 12s and 15s than before. 9s are still readily available. Quality is still strong with high color and high brix levels.

**Honeydew:** Sizing still favors 5s, 6s are limited, and 8s are hard to find. Suppliers are asking for flexibility on sizing. Overall, the quality remains strong with high brix levels between 12-14%.

## MIXED VEGETABLES

**Artichokes: EXTREME** Quality is good, but supplies are light, which is driving the market. Growers are holding to strict averages but prorates should be anticipated.

**Asparagus: EXTREME** The asparagus market remains extremely active, with demand continuing to exceed available supply. New fields have opened in Ica, Southern Peru, but meaningful improvement is not expected until late next week and into early October as production gradually increases. Elevated temperatures associated with strong El Niño conditions continue to affect yields and quality, resulting in smaller sizing, spreading, and feathered tips. Mexican production remains very light and is expected to stay limited for several more weeks. Overall supply, particularly larger sizes, is expected to remain tight until production from Ica and Southern Baja begins to ramp up.

**Bok Choy:** Quality is okay and supplies are limited.

**Broccoli Florets/Broccoli Crowns: ESCALATED** Quality is good, but supplies are tightening up. Reports of browning and pin rot continue. Organic broccoli remains at the extreme level. With increasing insect pressure, we expect supplies to become very limited. Some growers are prorating. The market is rising and Broccoli Crowns are escalated.

**Brocolini and Sweet Baby Broccoli: ESCALATED** Quality is good, but supplies are now extremely limited.

**Brussels Sprouts: EXTREME** Quality is good, but supplies have tightened up.

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

**Cauliflower: EXTREME** Quality is okay. Supplies have become extremely limited. Prorates should be expected from some growers. Insect pressure has increased drastically and is affecting yields.

**Celery:** Quality and supplies are okay. Disease pressure, black heart, remains a factor and is affecting harvestable acres. With school returning, demand is expected to increase, and the market will strengthen as we go into the fall. Organic Celery is escalated.

**Corn, Sweet:** We are seeing a split in the market with good supply available in the East while the West markets remain lighter than usual. Supply has tightened back up out of Oregon, California and Washington on bi-color and white. Yellow seems to be the shortest in the West. We continue to see good production in the Northeast as well as Tennessee and North Carolina, with Georgia looking to start in 10 to 14 days. Quality is good out of all regions.

**Fennel:** Quality and supplies have improved.

**Kale:** Quality and supplies look good.

**Leeks:** Quality and supplies look okay.

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

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

**Green Cabbage: EXTREME** Quality is good, but supplies are extremely limited. Growers will be holding to strict averages when they can but prorates should be expected. MX has had monsoon-type weather and triple digit temperatures. Yields are being affected.

**Green Onions: ESCALATED** Quality is good, but supplies are extremely limited. Growers will be holding to strict averages when they can but prorates should be expected. MX has had monsoon-type weather and triple digit temperatures. Yields are being affected.

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

**Napa Cabbage:** Quality and supplies have improved.

**Parsley (Curly, Italian):** Quality and supplies are good. Italian Parsley is escalated.

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

**Red Cabbage:** Quality looks good, but supplies are light.

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

**Spring Mix: WATCHLIST** Supplies and quality look good, but we are starting to see some decreased shelf-life.

**Snow Peas and Sugar Snaps: ESCALATED** Supplies of Guatemalan snow peas and sugar snap peas remain extremely limited, resulting in a highly active market. Domestic availability is also constrained due to weather-related disruptions and ongoing field transitions. Tight supplies and elevated pricing are expected to continue in the near term.

## TOMATOES:

**Q4 Updates:** Quarter 4 is upon us, and we need to remember this can be the most challenging time of year for the tomato supply chain with local and seasonal production winding down for the season. We will begin transitioning to Florida in the coming weeks as well as Mainland Mexico for the winter months; with a forecasted Super El Niño season expected we want to be prepared for any vulnerability to weather related pressure on supply. We will continue to monitor the weather in all growing regions as well as receive updates from our grower partners and provide that information to you as soon as possible.

## MEXICO

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

**Roma Tomatoes: ESCALATED** Stable supply and quality available out of Jalisco and Baja. Demand is very good this week putting upward pressure on prices. The drive for this is high demand from the East and lower production numbers out of Baja.

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

## CALIFORNIA

Supply has been fairly stable on rounds however larger sizes seem to be limited and drawing a premium. Romas are stable as well. General call prices are up this week as demand from the East was higher due to the ongoing rain in Central Tennessee and surrounding areas. Quality is very nice out of California currently on mature greens and vine ripens.

## OTHER FRUIT:

**Apples:** New crop Gala apples are being harvested, and inventory is building up. Granny Smiths are limited as they finish up storage crop, new crop will start in 1 week. Red Delicious, Fuji and Gold Delicious all have very limited storage supplies left, and new crop will start in mid to late September. New crop Honeycrisp apples have started, and good volume is available.

**Pears:** D'Anjou availability is limited; volume from both domestic and imports have dried up. The market remains stable, with new crop Bartlett's. Red D'Anjou Pears are moderately available in U.S. #1 35–55ct sizes and should remain in the market for another couple of weeks. Bosc Pears are currently gapping until their respective new crop harvests.

## EAST COAST

**Round Tomatoes: ESCALATED** Volume remains light this week, particularly on larger sized fruit out of Tennessee and North Carolina, mostly due to rain delays and quality. Quality is mixed out of all regions. Georgia should start scratching in approximately 10 days.

**Roma Tomatoes: ESCALATED** Supply will be lighter this week as production starts to decline on late summer plantings; South Georgia is expected to start in the next two weeks. Quality is fair at best due to weather-related pressure.

**Snacking, Grape Medley, Grape and Cherry Tomatoes: ESCALATED** Lighter volume this week on Cherries, Grapes and Medley volume will be steady. Markets will tighten up as season peaks start to wind down over the next two weeks. Quality is fair at best. We should see transition to Georgia will start in 14 to 21 days.

**Persimmons:** New crop FUYUs available out of California.

**Pomegranate:** Good supply available; New Crop out of California.

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

**Cherries:** Limited supply available.

**Stone Fruit:** Peaches and Nectarines are winding down out of California and other local regions. Good supply is still available on late season plums.

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

**Kiwi Fruit:** Supplies are fair out of Chile; California Kiwi Berries available.

**Mangoes:** Steady supply out of Mexico, Peru and Puerto Rico. Varieties: Tommy's, Ataulfo, Keitts and Haden.

**Quince:** Limited supply available this week.

**Figs:** Black Mission and Brown Turkey available out of California.

## DAIRY:

We had the EU Dairy Outlook & Risk Management Forum in Dublin Ireland this week. Attendance was record high and the energy was good. After a bullish couple of months I thought the sentiment would be bullish but there still seems to be plenty of butter around (matches with my expectations) and there is some skepticism around SMP prices staying at multi-year highs. I've spent some time digging into global trade flows and it continues to look like many importing countries have been stockpiling over the past six months. Milk production growth is still expected to slow down across the major exporters, but the demand side could slow down as well.

## PROTEIN:

**Beef:** Packers remain in the black, which should encourage harvest levels to increase into the 525,000 to 535,000 head range this week, roughly 25,000 head higher than last week's total. Cattle are expected to trade another \$1/cwt higher as positive packer margins increase competition for available cattle. Beef exports have been a bright spot, with the past three weeks posting higher year-over-year weekly export totals. Meanwhile, cattle futures have rallied approximately 5% since late August, reflecting continued optimism around tighter fed cattle supplies and stronger beef demand. Grinds are called steady to lower as are chucks and rounds while ribs and loins are seeing some decent interest.

### Turkey:

#### DOMESTIC MARKET HIGHLIGHTS

Frozen 8-16 lb. hens and 16-24 lb. toms steady. Demand light. Offerings light. Frozen commodity Grade A 8-16 lb. hens offered at 176-192 and 16-24 lb. toms at 178-192 cents FOB for current shipments.

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

#### EXPORT MARKET HIGHLIGHTS

Trading slow. Market steady to weak. Demand very light. Offerings light to moderate.

## SHELL EGGS:

National FOB shell egg weighted average prices are steady to lower for caged eggs with the balance of environments not well tested. The undertone mostly steady. Demand into retail channels is seasonally moderate. Domestic loose egg demand ranges light to moderate. Export demand continues to be reported as moderate to good. Offerings are moderate for the heavier weight eggs. Supplies are at least moderate. Market activity is slow to moderate. California weighted average delivered prices are lightly tested. The undertone is steady. Retail demand is light to instances moderate. Institutional and distributive buying interest is generally light. Offerings are moderate for the larger sizes, while light for Medium. Supplies are moderate. Market activity is slow to at times moderate.

**Chicken:** WOGs are steady. Trading activity is a bit mixed.

Floor stocks and supplies are adequate. Bone-in breasts and front halves are steady. Supplies are adequate. B/S breast have an at least steady undertone. Tenders are steady and looking for support. Wings demand is fair, a bit lackluster. Dark meats are well supported and full steady. The market is mostly steady.

Export markets are steady.

**Pork:** Pork packers continue to operate with margins near

\$20 per head. Carcass weights remain 3 to 4 pounds above year-ago levels, keeping overall pork production near last year's pace despite lower harvest numbers. Analysts expect the pork cutout to trend seasonally lower through November as production increases in the coming weeks. Export demand, particularly from Mexico, continues to support ham values. In the near term, belly prices are fading seasonally as the industry moves into the fall demand period. Trim values remain steady but are expected to soften as production ramps up. Loins continue to face pressure, while butts and ribs are holding relatively steady.



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