



Fresh Is Everything

Weekly Market Review

July 19, 2024

Overview

Corn, Roma tomatoes, bell peppers and hot peppers are all extremely short this week with possible GAPS in production on poblanos, habaneros and cubanelles. Most of this is due to heat and rain related pressure; with the transition to Tennessee and North Carolina expected over the next two weeks, we expect supply locally to be extremely short. In addition, table grapes, corn, bell peppers, stone fruit, soft squash, tomatoes, beans and eggplant will see weather-related pressure in the west as they are exposed to the first major heat wave of the season in California. We will need to watch this closely as it could dictate the direction of several markets for weeks.

Table grape supply out of Mexico is winding down rapidly. Recent rain and heat have caused quality issues and fruit is being rejected at the border daily for poor sizing, soft berry, shatter and other shelf life issues. California grape production has begun and quality is outstanding.

Market stability is seemingly within reach for avocados. Standing inventories have been pivoting around a comfortable 60M pounds, with days of supply only slightly higher on larger sizes. With plenty of country-of-origin options supplying the industry, and price points coming back down-to-earth, avocados can once again take part in summertime promotions. For the short-term, additional movement is needed on 48s and larger, but once August is here, that will switch to 60s and smaller.

Rain continues in most Guatemalan growing regions damaging crops. This will have long-term effects on commodities such as French beans, snow peas, sugar snap peas, heirloom tomatoes, and hand-peeled baby carrots. The weather in the Salinas Valley is returning to normal temperatures but the inland valleys remain very hot. The growers have all done a great job navigating the heat and harvesting earlier in the day to keep supplies in a good place, but we could still see some difficulties.

As for quality, we have been seeing good quality on most items, but the heat has caused thinner texture for spinach, light internal burn for romaine, and damaged cap leaves for lettuce. Once removed, the quality is good. Lettuce liner is still slightly escalated and may increase more depending on how the heat continues to affect the fields. Broccoli and Brussel sprouts are still escalated and are a challenge as far as supplies go. Broccoli supplies are improving, and we should see the market start to come down. Brussel sprouts continue to have quality and supply issues that may not see relief until we get into August.

Some growers are having more challenges than others, so we should expect to continue to see supply issues with the sprouts. Smaller volume items that are currently escalated due to the heat are endive, escarole, leeks and fennel. We will also continue to monitor the heat and closely watch lettuce liner, romaine, broccoli, cauliflower, green onions and spinach.

MARKET ALERT

EXTREME							
	French Beans	Hot Peppers (all varieties)	Lemons (small sizes)	Tomatoes (Roma)			
	Artichokes	Bell Pepper (all colors)	Brussels Sprouts	Corn	Green Beans	Limes	Snow Peas
ESCALATED							
	Asparagus	Bok Choy	Cabbage Red	Endive & Escarole	Leeks	Napa	Tomatoes (Rounds & Grapes)
	Avocados	Broccoli (Florets & Crowns)	Cilantro	Fennel	Lettuce Iceberg Liner, Blends, & VA Iceberg	Parsley (Curly & Italian)	
WATCHLIST							
	Carrots (Jumbo, Med, Cello)	Cauliflower	Ginger	Green Onions	Lettuce Romaine & VA Blends, Boston/Butter Lettuce, Better Burger, Green Leaf & Red Leaf	Oranges	Spinach

FRUITS & VEGETABLES

Avocados: ESCALATED Colombia's imported numbers were revised down for the last few weeks adjusting down the total volumes for the US in June. Last week, the biggest increase in volume came from Peru and total volumes exceeded 60M pounds. Mexico's marketshare dropped to 40%, while California and Peru are neck-to-neck at 28% and 25% respectively. Harvest in Mexico remains strongest on Old Crop/Negra fruit as Loca needs some sun for dry matter to increase to ensure it makes minimum requirements for importing to the US. Last week's arrivals from Peru came in at 14.8M pounds, and projections are calling for similar volumes for the next 3 weeks. The size curve coming out of the mid-season harvest is slowly sizing up, but significant changes aren't expected for this year. This season will have an earlier ending than the previous several years, as volumes will rapidly decline in late August. California is having a great season, with 16.8M pounds harvested last week. The timing of strong grower returns and high demand for fruit has lined up well this season, and clearing the trees early has the added benefit of reinforcing a stronger set for next year. Estimates for what remains on-the-trees in California continues to grow and the season will now easily last through August.

BERRIES

Strawberries: Slightly cooler daytime temperatures this week out of Watsonville in the high 60's to 70's and nighttime temps in the mid 50's. Production may have passed our peak, but we are expecting at least high, steady production for the next four weeks. We are seeing increased instances of darker, overripe fruit due to higher temperatures as the summer progresses. Both methods have good sheen, medium size, strong red color, and good flavor, but all growers are seeing soft fruit, bruising, mildew, and overripe fruit. Labor has tightened. Due to the high heat, we are seeing fruit ripen quickly, resulting in smaller sizing and softer skin (more easily bruised). Spring crop production in SM is quickly winding down, and we expect the fall crop harvest to begin sometime between late August and mid-September. We are seeing issues of bruising, soft skin, mildew, and overripe fruit in the fields. Although organics will be steady for the next 2-3 weeks, we expect more overall production volume drops due to high heat, season winding down, and ensuring high-quality packs. Spring crops may be wrapping up soon.

Blackberries: Quality is good out of Mexico with sizing between the medium to large range, nice sheen, mostly black and with good firmness. Due to high temps in the regions, we do see some regression in some ranches and some soft, leaking fruit as the days continue to be hot. Watsonville Blackberries are looking great, with medium-to-large sizing, and most having great flavor. Attached calyx seems to still be a minor occurrence, and we are seeing some issues of smaller fruit that tend to be tarter. Overall, production seems to be good so far and we are expecting lots of fruit to start coming in the next 2-4 weeks. Expecting steady increase in supply starting in early August until late September.

Bananas: Steady supply and quality remain good across the country except for Texas which could be delayed due to Hurricane Beryl. We suspect it will improve over the next 7-10 days.

Pineapples: Supply was lighter this week and quality remains good. Sizing is going to be a challenge over the next few weeks. Flexibility on sizing may be needed as 5-6ct fruit is very short with 7-8's plentiful. We expect to see the sizing distribution even out by the middle of July.

Table Grapes: Excellent supply will be available out of California this week. Mexico is mostly done for the season. Quality out of California is mostly good; the crops are taking the heat wave better than expected.

Raspberries: Daytime temperatures out of Mexico are in the low 80's. Overall, fruit looks good with a strong red color, with some fruit lighter in color in the pack due to picking a bit early ahead of the heat. We do see some overripe and crumbled fruit sporadically throughout the packs, but crews are doing their best to keep them out. Rain is causing some concern for increased instances of mold, but our quality teams are doing a good job keeping them out of the packs. The volume of raspberries has passed its peak and will steadily decline throughout August until we pick back up in September. Watsonville raspberries are looking good and will have solid production for the next two weeks or so. After two weeks, the growers expect raspberry production to dip steadily and quickly by about half each week while the next set of fall crops start to fruit (past peak production). Overall, the color is a nice dark red due to the warm temperatures underneath the hoops, and the sizing of raspberries is a good medium size on average. We expect a steady drop in volume towards the end of July through October before picking up again.

Blueberries: Growers are seeing some issues of shriveling, scarring, and deformities. Overall, the blueberries' color, size, and flavor are good. Production is trending down due to the high heat. Conventional-wise, volume is expected to dip in late June through July and start ramping up towards September. Organic-wise, volume has begun tapering off and will have low amounts of small, steady volume over the next few months. Production has wrapped up for the season out of Central Valley. Oregon started off strong this last week with excellent fruit and meeting estimates. Organics have been slightly delayed, and will begin packing this week. Oregon is expected to hit a large volume towards the middle of July. Washington organics has also started production. Fruit is looking great as well. Washington is expected to hit a large volume towards the middle of August. Conventional fruit will begin sometime next week.

CALIFORNIA CITRUS

Oranges: WATCHLIST We are seeing steady volume on Valencias with good quality. There are currently small size oranges available but as the summer progresses, fruit will be sizing up and small oranges will become scarce again. In addition, many shippers are predicting a gap between the end of the Valencia season and the beginning of the Navel season this fall.

Lemons: EXTREME ON SMALL SIZES We continue to see small Lemons in California exceptionally short with no relief in sight until District 3 fruit gets started late in the summer. Import Lemons are arriving with small fruit available. Supplies on Lemons from Mexico continue to be very light as drought conditions have affected available fruit to pick. *Flexibility on sizing and loading areas will be mandatory to get orders filled on orders loading in California!*

WEST COAST LETTUCE

Iceberg: ESCALATED Supplies and quality are good. We have seen a bit of sun damage on the cap leaves but once that is removed, the quality is good. This item is still slightly escalated and could potentially escalate more if the heat continues and causes more quality issues.

Iceberg VA: ESCALATED Iceberg VA items are still escalated this week and will be on the radar for the month of July due to the heat wave.

Romaine, Romaine Hearts: WATCHLIST Romaine and romaine heart supply is good, but there is some internal "sat n

EASTERN AND WESTERN VEGETABLES

Green Bell Pepper: ESCALATED Lighter supply in the east and west has spiked the market and we expect conditions to be the same for the next week. Transition in both regions, combined with weather related supply as well as quality issues, have impacted supply until we can get into newer blocks. In the west, green supplies are slowly improving; however, we will need to keep a close eye on the west as the heat wave will impact the early crop out of Bakersfield and Arvin.

Color Bell Pepper: ESCALATED Very light supply and fair quality will impact the market for the next ten days, mostly due to the west coast. Seeing some poor quality, soft pepper and sun scald. Expect to see challenges over the next two weeks. There are some hot house peppers available from Mexico and Canada.

Mini Sweet Pepper: Supply will be hit and miss this week loading in California.

Mixed Chili Pepper: ESCALATED Record low supply continues! In the east we are seeing a GAP on a few hot pepper items. Poblano and cubanelle are the shortest due to heat and rain related pressure; with the transition to Tennessee and North Carolina expected over the next two weeks, we expect supply locally to be extremely short. There are some local deals starting to scratch and Southern Valley is doing what they can to secure any additional product. In Mainland Mexico we are starting to transition from Guanajuato
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Limes: ESCALATED ON SOME SIZES Large sizes are increasing in availability due to the consistent rain over the past few weeks, although fruit quality/condition continue to be fair. We are starting to see a decline in small sizing and availability will start to decrease towards the end of the month. Pricing trends are beginning to shift as volume on large sizes increases.

Grapefruit: California Grapefruit is being packed in Riverside and the central valley.

Imports/Specialties: Import lemons, oranges and mandarins are available.

peppering" in the hearts. Product is slightly dehydrated from the high heat, and you may see some light fringe burn on carton romaine. This item will be on the watchlist for all of July and may potentially escalate if the heat starts to impact supply and quality.

Green and Red Leaf: WATCHLIST Production in the Salinas Valley is steady. Overall quality is very good with good movement. These items were added to the watchlist due to the concerns of the heat wave.

Butter: WATCHLIST Production in Salinas Valley is steady. Overall quality is good.

to Chihuahua but are also seeing delays. The new regions are receiving quite a bit of rain and may get hit by this latest hurricane in the Caribbean Sea. Currently there are very tight markets on the following items: habanero, shishito, anaheim, serrano, poblano. Tomatillo and jalapeno supplies are fair. In the west the summer production is not quite ready in Baja nor California. We do not expect to see improvements for the next two weeks in the west.

Eggplant: Good supply and quality available this week out of the Central Valley and Southeast. We will need to watch the west as they are about to be hit by a heat wave that could damage unprotected crops.

Slicer Cucumbers: Steady supply this week crossing in Otay and McAllen. Domestically some of the local regions are scratching such as Tennessee and Michigan. Overall, the quality is good.

English Cucumbers: Stable supply and good quality will be available this week.

Pickles: Supply and quality are good this week.

Green Beans: ESCALATED Supply is lighter this week and quality hit and miss due to weather related pressure.

French Beans: EXTREME Markets have improved slightly and are expected to continue to improve.

Zucchini/Yellow Squash: Excellent supply out of California as well as several local regions. Quality is good.

HERBS

Good supply and quality on all herbs. Chervil production is normal.

HERB	SUPPLY	QUALITY	COUNTRY OF ORIGIN
Arugula	Steady	Marginal	USA
Basil	Steady	Steady	USA/MEX
Opal Basil	Steady	Steady	USA
Thai Basil	Steady	Steady	USA/MEX
Bay Leaves	Steady	Steady	USA/COL
Chervil	Limited	Limited	
Chives	Steady	Steady	MEX
Cilantro	Steady	Steady	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	Steady	Steady	USA
Savory	Steady	Limited	USA
Sorrel	Steady	Steady	USA
Tarragon	Steady	Steady	MEX
Thyme	Steady	Steady	USA
Lavender	Steady	Steady	USA
Lemon Thyme	Steady	Steady	USA
Lime Leaves	Steady	Steady	USA

MELONS

Cantaloupe: Excessive temperatures over the past week in the Westside District have accelerated the maturity on melons pushing higher than expected daily pack outs. These high temperatures (109-113F) will continue through the balance of the week which is limiting the amount of time harvest crews can be in the fields. The heat has pushed cantaloupe sizing up to mostly 9/9Js currently being harvested with a limited number of 12s. Fruit being packed has excellent sizing and full straw color with strong brix levels in the 14-17% range. Peak volume will continue throughout the month of July, but flexibility of sizing may be necessary.

Honeydew: Honeydew production is backing off some the next few days as extra crews are being placed into the cantaloupe fields which are more susceptible to the heat. Sizing on the dews has mirrored the cantaloupe with mostly 5/5Js and we have been packing 6Js to ensure coverage on all contractual commitments. Quality on the honeydews is checking all the boxes with clean fruit being packed and internally brix numbers are hitting 15+% with an excellent flavor profile, but flexibility of sizing may be necessary.

Golden Honeydew: Supply available out of California.

Watermelon: Good supply available as new crop is being harvested out of North/South Carolina, California, Missouri as well as Mexico.

MIXED VEGETABLES

Artichokes: ESCALATED Overall supplies are still light. Quality is good.

Arugula: Supplies are good, and quality is fair, but we are watching for more yellowing.

Asparagus: ESCALATED Markets are still active with the lack of production. Obregon/Southern Baja production has improved this week with better weather in the region. Production in Guanajuato has improved with more rain in that region. Peruvian volume is better this week and should continue to improve in the next two weeks. White asparagus continues to be out until the end of July. Large sizes will also be difficult to come by for the next few weeks. Warm weather in both Mexico and Peru is causing smaller sizing.

Bok Choy: ESCALATED Supplies are fair, and quality is good, but there are some issues with dirt in the core. The market is active.

Broccoli/Broccoli Crowns: ESCALATED Overall quality is fair, and supplies are improving. While pricing is still escalated, it is trending down. We have seen some brown and yellow bead, purpling, deformation and some pin-rot.

Brocolini and Sweet Baby Broccoli: Salinas is showing good quality, but supplies are limited. The heat is taking its toll on this product.

Brussels Sprouts: ESCALATED Sprout demand continues to outpace available supply. Supplies in the VA category may see some shortages driven by quality issues and whole sprouts will continue to see prorates. Insect damage is still a chronic problem, discolored leaves, smaller sizing and elongated stem are all issues that have been reported.

Carrots: (JUMBOS, MEDIUMS and CELLOS) WATCHLIST Steady supplies continue with good Quality. Shippers still have light volume out of California, but volume is improving.

Cauliflower: WATCHLIST Industry supplies are great, and quality and color are very good, but the heat wave could cause yellow bead, discoloration, pin rot and breakdown. This item is on the Watchlist as a precaution from the heat, but supplies remain plentiful at this time.

Celery: All production is now in Salinas. The quality is very good, and supplies are steady.

Cilantro: ESCALATED The market is active and supplies are looking good. The price is coming back down. There have been some field challenges such as burn, mildew and spotting, but things seem to be improving.

ONIONS:

The onion market is weakening fast on yellows. Between the influx of supply in New Mexico and Central California, as well as the constant crossing of Mexican onions, there is a situation where supply is exceeding demand on yellow onions. We anticipate this situation will stay sloppy on the supply side until the beginning/middle of July. At that point, a lot of the Mexican product, and the remnants of previous deals (Brawley, Washington) will be cleaned up which should help to shore up the surplus of supply. Reds have remained elevated, and while there are volume deals taking place in California due to extreme

Corn: ESCALATED Lighter supply in the east due to transitional gaps and poor quality is prevalent due to insect pressure. In the west, supply is stable. Overall quality is hit and miss with FOB prices being much higher this week.

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

Garlic: As the current season is ending, we are seeing some slight delays in the new crop California Garlic getting started as growers are seeing some growing challenges. Quality remains good.

Ginger: Supplies and market are steady.

Green Cabbage: Supplies are steady with very good Quality. Demand is good.

Green Onions: WATCHLIST Due to the extreme heat and humidity, we are seeing reduced yields from harvesting and will likely see the market gradually escalate over the next few weeks.

Mushrooms: Stable supply and good quality available.

Napa Cabbage: ESCALATED We continue to see some quality issues, but we should see an improvement over the next few weeks. Quality and supplies are improving.

Parsley (Curly, Italian): ESCALATED Supplies are improving quality is fair.

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

Red Cabbage: ESCALATED Pricing is escalated, and quality is good although supplies continue to be tight. Market remains very active.

Spinach (Bunched & Baby): WATCHLIST Supplies are still good with very good quality. The hot weather makes it grow faster but we are watching for yellowing and mechanical damage.

Spring Mix: Supplies are good with very good quality.

Snow Peas and Sugar Snaps: ESCALATED Guatemala production of snow peas and sugar snaps is almost non-existent due to weather issues the past 3-5 weeks. Peruvian snow peas are available in Miami. Markets are very active on all peas. Out of the west, snow and sugar snap pea supply is improving.

heat, and in order to move yellows, they appear they will stay fairly strong until the Northwest. Whites had gotten very cheap over the last several weeks, and we are starting to see a lot of those get cleaned up. We should see those rebound and potentially tighten up in the coming weeks as well. There are reports that the Northwest planted more acreage than last year, and pending weather conditions, may have a large crop that will start as early as late July. If that should happen, the market will have a hard time crawling out of wherever the price points are when the Northwest enters. Trucks continue to remain plentiful, and we have not seen any type of rate spike this week.

POTATOES:

The market continues to feel stable on all sizes and grades for the moment. We continue to see 40ct/50ct and now even 60ct remaining tight. They are available in mixer quantities, but heavy volumes do not seem to be available at the moment. Smaller size potatoes continue to remain plentiful and challenging to move. There is really not much further for the market to fall here, as growers are at the point where it would not make any financial sense to pack them at all at lower pricing levels. While relief was widely expected for this coming year, nobody thought the FOBs would be quite as low

as they currently are. At this point, there does not seem to be a scenario where the market turns around any time before the Summer. Even then, supply will have to dwindle enough in June/July to allow FOBs to firm up, and quality will need to be strong enough to hold as well. The positive news is that quality is strong throughout the state, and there should be no shortage of available product in all sizes and grades. In fact, there will likely be an overlap of this year's current crop into next year so next year could unfortunately be a tough year on grower returns as well. Trucks seem to remain plentiful at the moment.

TOMATOES: EAST COAST

Round Tomatoes: ESCALATED No major changes in the markets despite the local deals now being in full swing with strong demand and firm markets. Now picking in North Carolina, Tennessee, Arkansas and Virginia. Deals are being made on larger sized fruit this week, but we expect that distribution to even out over the next 10 days. Overall quality is very nice.

Roma Tomatoes: EXTREME Markets remain firm and prices were a bit higher as supply has not hit a good stride yet locally. We expect to remain this way through the middle of next week at the earliest.

Grape Tomatoes: ESCALATED Improving supply locally has put downward pressure on the category. We expect this to continue as more volume locally becomes available.

Cherry Tomatoes: Supply is stable with moderate demand. Quality is good.

TOMATOES: MEXICO

Round Tomatoes: ESCALATED Good supply and quality available out of Jalisco and Baja but rain this week could impact Southern Mexico causing delays in harvesting. We will need to watch the outcome of the tropical weather impacting Central and Southern Mexico this weekend. Expect to see higher demand and upward pressure on price as demand will increase from the east as the local transition is underway. This will put upward pressure on FOB prices.

Roma Tomatoes: Very limited supply continues out of Jalisco and Baja but rain this week could impact Southern Mexico causing delays in harvesting. Baja has transitioned from Vizcaino to San Quintin and we should see more volume over the next 7-10 days. Central Mexico volume remains light crossing through McAllen due to rain related quality pressure. We expect to see good demand and lighter supply for the next week, which will keep upward pressure on FOB prices.

Grape Tomatoes: ESCALATED Supply slowly improving out of Central Mexico and Baja. Markets remain firm due to strong demand from the east. This should stabilize as the east coast production starts to ramp up.

Cherry Tomatoes: Steady supply and good quality available crossing through McAllen and Nogales.

Medley Grape Tomatoes: Good supply available this week. Quality is good.

Tomato on the Vine: Steady volume available this week.

CALIFORNIA TOMATOES:

WATCHLIST Mature greens are hit and miss out of the Central Valley. Weather related pressure (extreme heat) has caused a lot of quality issues on product being pulled out of the region. We expect to see higher cull rates and compromised quality for the next 2-3 weeks on rounds and romas.

Pears: The crop appears to be 5 weeks from being finished for the Season. The Bosc Crop is finished for the Season, and Red Anjous should be done in the next 4 weeks. Northwest Bartlett Crop should start around August 8th, leaving us about a 2-week gap between old Anjous and New Crop Barts. The Wenatchee Valley Pear crop was devastated due to freezing temps in February. The Yakima Valley and Hood River Growing Regions were hurt but not nearly as badly as Wenatchee. Bottom line – Pear crop will be extremely tight the entire '24/'25 season.

APPLES

Apples: Washington State Apple Crop continues to produce good supplies and good quality products. The Core Varieties, Reds, Golds, Galas, Fujis, Gr Smiths, and Honeys, will make it to a new crop. Galas are down 600,000 boxes from last year, but the state still shows availability that will likely last for the new crop.

OTHER FRUIT

- California stone fruit now in production and cherries are winding down and will transition to the PNW.
- Apricots now available.
- California table grapes will scratch this week.
- Georgia Peaches are in excellent supply.

DAIRY:

It was a relatively quiet week with mixed but generally small price changes across the major exporters. GDT Pulse prices were down which has helped to keep some pressure on U.S./EU SMP prices, but neither have fallen to match the lower GDT price yet. U.S. weather has been hotter than usual on both coasts, which is denting production, but production might be holding up better than the weather maps would make it seem. Milk production is seasonally falling in the EU but is likely above last year. Next week is light on data as well, but we should get May exports from the EU and possibly the remaining EU production data for May as well.

BEEF MARKET:

All the core beef industry metrics declined last week, cattle prices, cutouts, cattle futures, and packer margins. Beef packer margins turned red and were estimated to be negative \$9 per head. The week prior they were positive \$22 per head. Expect packers to keep the harvest reigned to pressure the live price lower. Saturday harvests will be small in the near term. Last week's total harvest was 601k head and this week it is projected to be 600-610k head. Cattle sold for \$188-191CWT last week which was \$2/CWT lower than the week prior. 90% trim remains at record levels giving pricing support to fed outside cuts for grinding. Weak demand for ribs and loins is combining to force the cutouts lower. The choice as of Monday's close was off \$8/CWT from its high. Analysts expect the Choice cutout to bottom \$315-\$318 CWT.

- Rounds – steady/higher
- Chucks – steady
- Ribs – lower
- Loins – lower
- Grinds – steady

CHICKEN MARKET:

Prices are steady to weak for 3 pound and heavier sized wogs; steady to firm for smaller sizes and steady for whole fryers. Supplies are moderate to heavy for wogs and moderate for whole fryers. Demand is light to moderate approaching the weekend. Market activity is slow to moderate. Processing schedules are normal. Floor stocks are balanced. Market activity is slow to moderate. In the parts structure, prices are steady to weak for wings with smaller sizes in the longer position. B/s breasts and tenders are steady to firm with jumbo size b/s breasts well cleared. Bone-in breasts, fronts, and most dark meat cuts are steady. Supplies are moderate to heavy for wings; b/s breasts and tenders are light to moderate. Bone-in breasts, fronts, and dark meat cuts are mostly moderate with thighs and thigh meat in good balance. Demand is light to moderate; market activity is slow to moderate.

EGGS:

New York eggs are 4 cents higher for Extra Large and Large and down 2 cents for Medium. California and regional prices are steady. The undertone is steady to fully steady. Retail demand is moderate to instances fairly good and foodservice demand is light to moderate. Offerings are light. Supplies are light to moderate. Market activity is moderate. Breaking stock offerings are light to very light for the mostly light to demand. Spent fowl supplies are light to moderate; processing schedules are normal.

PORK MARKET:

Analysts are forecasting a 4-5% increase YOY in pork production through August and the harvest is expected to average 2.4 million head per week during this time. Pork is readily available this week and the basic primals are called steady except for b/i hams which are seeing strong export interest from Mexico. The uptick in export demand is a bit of a surprise since the Peso has been losing ground to the US Dollar which makes US Pork more expensive.

- Butts – steady
- Ribs – steady/lower
- Trimmings – steady
- Loins – steady
- Bellies – steady
- Hams – higher

TURKEY MARKET:

The market on frozen 8-16 lb. hens and 16-24 lb. toms is steady with a steady to weak undertone. The November fresh turkey market is mixed with supplies held with varying degrees of confidence. Demand light to moderate, best on fresh for the fall. Offerings at least moderate. Frozen domestic 2024 production Grade A basted equivalent processor offering prices on a national basis for Grade A 8-16 lb. hens are 76.00-103.00 FOB and 16-24 lb. toms 78.00-105.00 cents FOB for current shipments. No frozen trading reported. Fresh November trading slow at 122 cents FOB. The market on tom breast meat and destrapped tenderloins is steady with some spot weakness noted on frozen. Fresh tom breast meat inquiry moderate, frozen tom breast meat light, and tenderloins light to moderate. Fresh tom breast meat offerings very light to light, frozen light to moderate. The breast trim market is steady and wing meat with skin steady with spot strength noted. The scapula market is steady to instances firm with frozen having mixed undertones. Breast trim and wing meat with skin demand light to moderate. Scapula demand mostly moderate to

instances good. Breast trim, scapula, and wing meat with skin offerings light to moderate. Further processed demand mostly moderate. The consumer sized breast market is steady to weak. Institutional sized breasts market steady on 8-16 lb. sizes and steady with a steady to weak undertone on 16 lb. and heavier sizes. Demand light. Offerings moderate to moderately heavy on 4-8 lb. breasts and institutional sizes light to mostly moderate. The frozen tom drum market is steady to firm, fresh steady. Tom 2-joint wing market is steady with spot unsettledness noted, tom full-cut wings steady to weak and tom necks steady with a steady to weak undertone, tails steady to firm. Demand light to moderate, best on tails. Tom full-cut wing offerings light to moderately heavy, drums and necks light to moderate with necks longest. The tom 2-joint wing demand is light to moderate with spot availability noted. The thigh meat market is at least steady. Demand and offerings light to moderate. The mechanically separated turkey market is steady. Demand and offerings light to moderate. Trading slow to moderate.



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