



Dale's Market Update: Nov 7th 2018 - REVISED

Apples

- Galas, Honeycrisp, Red Delicious, Gold Delicious, Pinks, Granny Smith, Fuji, Autumn Glory, Jonagold, Opal, and Braeburn available from Washington

Asparagus

- Peru is ramping up for Thanksgiving, most retail ads are set and product is booked- Quality has been outstanding
- Airspace is the challenge suppliers are facing which is the case every year for the holiday.
- Mexico is increasing production for the Thanksgiving holiday and supplies at the moment are good. December is another issue, there will be a transition phase (growing areas) for most of December which is the case almost every year. Supplies and production will be back to normal mid to end of January.

Avocados – Imported & Domestic

- For the past eight days, there has been agricultural/political upheaval in the avocado growing regions in Mexico that has stopped all harvesting of avocados. The Mexican government is working with the Mexican Avocado commission to resolve this stoppage as soon as possible. The avocado market has been depressed and growers are trying to create a short-term supply situation.
- There is a very large crop of Avocados and all US importers, who have a vested interest with these Mexican growers, are applying as much pressure to resume harvesting and crossing fruit back into the US.
- Short term, this has and will continue to create a very limited supply this week, with the threat of no fruit available next week, if this stoppage continues. The best-case scenario today is that harvest will resume on Wednesday and by Thursday 11/15 supplies will be back to normal, although pre-conditioning will remain an issue through the Thanksgiving holiday as there will be such a demand built up that there will not be enough time to bring fruit in and condition for days. Most importers have enacted a Force Majeure and the market is expected to spike over the next 10 days.
- Long term, again, there is a very large crop and the market is expected to get back to 'normal' in December

Berries

CV / OG Strawberries:

- There are split markets on old crop Salinas/Watsonville vs new crop Santa Maria/OX fruit. Fruit will trend downwards moving forward into the fall/winter season

CV & OG Blackberries:

- Tropical Storm Willa hit Mexico and did some damage but limited really to just organic and conventional blackberries. Look for a 20% reduction in supply for the next 7-10 days

CV & OG Raspberries:

- Yields are down throughout CA due to a faster downtrend on December plantings. Volume is lower out of Baja and CEMX due to lower yields. Some percentage of lower volume out of CMEX is attributed to quality issues, ranging from soft/leaky fruit to insect pressure.



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Broccoli

- Moderate production with strong demand for the Thanksgiving holiday! Market active. With previous adverse weather in many growing areas, production will be very volatility through November. Transition of growing areas from north to south happening over the next few weeks.

Cauliflower

- Moderate supplies with increased demand for the Thanksgiving holiday! Market much more active this week as demand peaks for the holiday pull! Quality is nice, good sizing and weight, although some off-white to occ yellowish curds. Salinas ending early/mid-November. Yuma starts mid-November.

Celery

- Good production and quality through the month! Demand and shipments have dramatically spiked for the Thanksgiving holiday! Truck loading situation will bottle-neck at shipping through next week. Loading delays may be experienced thus loading a day early or loading early in the day is highly recommended. Production continues in Salinas through mid-November. Oxnard just started and will be in full production by mid/late-November.

California Citrus– Domestic

- **CA Navels** – season has started, fruit size is running on the small side, but we can cover 56ct. Look to run bags. December will be a great time to run bag ad and bulk fruit promotions. Internal quality is really good for the start of the season.
- **Lemons** –, large lemons are tight 140-200ct is readily available, bag lemons are in strong demand
- **Organic Oranges** – starting in a small way but we are seeing strong demand for late November and December promotions. **Full Circle 4# bags have started.**
- **Organic Lemons** –quality is nice
- **Org Grapefruit** – Good Supplies
- **Texas Grapefruit** – Shipping good supplies, promotions are being planned for the holidays

Grapes

- This season will be one for the record books. So far with just one minor rain event behind us, the weather continues to be ideal with no rain in the forecast. With these near perfect conditions, we are experiencing a high volume, superior quality, 2018 crop. The demand has been remarkable as well with weekly shipments exceeding our expectations. Most crews finished harvest in Maricopa early last week, moved north and consolidated here in the Delano/Fresno area. The season is far from over though, as we are now getting started on our late season



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varieties. With about a third of the crop remaining on the vine, we will harvest until early December, weather permitting. Since harvest is running later this season, there are fantastic retail opportunities to really lift category sales and profits into 2019. The day of featuring "California Grown" grapes in the first week of January is here! Please encourage your Merchandising Teams to take advantage of these opportunities.

- **Green Seedless:** There are the new crop of Autumn King into the mix with some Autumn Crisp. As always, the size will grab your attention and the flavor this season will keep your attention. This grape had plenty of 'hang time on the vine' and tastes great. As we get near the end of November, we will roll out Autumn Crisp for our late season offering. Everything from here to the end will have big size, excellent flavor and sound condition.
- **Red Seedless:** SW Scarlottas will be outstanding.
- **Black Seedless:** Do you want big berries and full black color? Then order the Adora, Thanksgiving but there is a finite supply. The market is firming up a little bit on these, but keep them on your order pad.

Leafy Lettuce (green, red, romaine)

- Moderate production on green/red leaf and light on romaine. Production down on romaine as some quality issue have reduced yields. Transition to Yuma starts this week and will be fully transitioned in 2 weeks. Market very active on romaine.

Iceberg Lettuce

- Production slightly below normal which has spiked the market! Production down as the growing area transitions from Salinas to Huron to Yuma. Salinas finishes this week as some quality issues put an end to the season. Huron center of production next 2 weeks. Yuma starts this week in a light way and will be fully transitioned down there by mid-November. As growers reach in these fields early in Yuma, weights will likely be slightly lighter and this early harvest may also keep supplies shorter for a little longer than expected. Market expected to remain very active through November.

Mangos – Imported

- Active market, good demand
- As Ecuador finishes, supply is shifting from being well distributed on size with all arrivals coming in from Brazil.
- Sizing will favor 9s and larger out of Brazil. Currently, Ecuador is seeing extremely small sizes. For Weeks 46 – 49, 12cts will have promotable volume.
- Quality is great.

MELONS

Cantaloupe & Honeydew

- Yuma is flowing with more 9s and 12s available, Jumbo 9s are limited. Quality is looking good and expected to harvest for about 4-5 weeks. Honeydews are short supply with more 6cts available out of Yuma. Product of Mexico crossing are in good supplies with deals available on 5s and 6s.



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Watermelons

- Mexican product crossing into McAllen and Nogales are not seeing a supply interruption, quality is looking good and expected to continue until beginning of December. Florida is harvesting with limited availability, more 45cts and 5cts available

Mushrooms

- Steady, suppliers are good. No major issues to report.

Onions

- Market is steady- Getting somewhat active for the holiday
- Sweet Onions are getting active for the holiday- Supplies are good and quality is good

Organic Veg – California

- Iceberg Lettuce –Limited supplies available, Market Higher
- Leaf-Limited supplies on Green, Red and Romaine (expect pro-rates) Market Higher
- Broccoli- Decent supplies available, Market Steady
- Cauliflower-Limited supplies, Market Steady
- Celery/Celery Hrts- Decent supplies, Market Steady
- Cilantro- Good supplies available, Market Steady
- Green Cabbage-Good supplies available /Market Higher
- Mix (Chards, Kales, Parsleys)- Good supplies- Market steady
- Red Beets- Good supplies available, Market steady

Pears – Domestic

- Bartletts, Bosc, Danjou, and Red Pears available from Washington

Pineapples

- Market remains steady
- Quality is good, but be careful of overripe fruit
- Promotable volume!

Potatoes – Western

- Russets- Market getting active for the holiday- Trucks will be the challenge



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- ID- Extremely active out there- supplies good, production and pack time to get trucks and orders out are the challenge

Bagged Salads

- No major issues at this time

Tomatoes

- Out of Mexico, torrential rains caused major flooding throughout the country and Hurricane Willa is affecting crops – damage is being assessed, but we expect a challenging winter out of Mexico as growers and the community itself are facing months of recovery and rebuilding.

Hot House Tomato

- Canada is experiencing hotter weather which is causing fruit to ripen faster, causing harvesters to pick earlier, causing lighter color and smaller sizes.
- As we wind-down the Canadian season, this will be the norm.
- Mexico will not start for another 2 weeks or so with sufficient volume. Product crossing now is fair to good quality.