



Dale's Market Update

February 15, 2019

Apples

- Galas, Honeycrisp, Red Delicious, Gold Delicious, Granny Smith, Fuji, Jonagold,, and Braeburn available from Washington.

Asparagus

- Mexico had some cooler weather this week and some of the areas got a freeze which slowed production a bit but did not affect quality.
- Market is stabilizing and FOB's are leveling out. As long as the weather cooperates, supply will increase.
- Peru is almost completely done for right now. Most of all product being shipped is Mexican

Avocados – Imported & Domestic

- Going into the biggest pull period of the year, any concern of trucking shortages in Mexico have been for the most part resolved and there is an excellent supply of very good quality Mexican fruit for the Super Bowl. As the weather may impact overall sales, we should continue to see a significant increase in consumption of avocados, especially west of the Mississippi. Expect good supplies through February and into March.
- The California crop will be significantly down from last year. The total harvested ended up in the 310 million pound range last year. This year, the California Avocado Commission's most recent estimate is about 160 million pounds which is about half of the volume as last year.

Berries

- Strawberries continue to increase in supply in FL and MX next week. CA and Florida though have more rain forecasted this week. This could keep this market somewhat limited
- Blackberries are limited due to region transition and weather. There are some quality/condition issues but our Topco inspectors will pick out the right lots
- Raspberry volume is picking up a little each week with a peak in beginning of March
 - Blueberries this week and next are the peak volume weeks with Chilean arrivals. Then volumes will start to come off every week after that, as Chile wraps up.



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Broccoli

- Moderate supplies with good demand. Market fairly active. Production is up and down as fields are affected by weather changes and off planted schedule. Adverse weather in the central CA growing area may create some strong spring production fluctuations as well during the transition to Salinas. Crop projections will be difficult over 2 weeks out.

Cauliflower

- Moderate supplies with good demand. Market fairly active. Production is up and down as fields are affected by weather changes and off planted schedule. Adverse weather in the central CA growing area may create some strong spring production fluctuations as well during the transition to Salinas. Crop projections will be difficult over 2 weeks out.

California Citrus– Domestic

We are back into a rain market with Rain again being forecasted 5 of the next 7 days.

- **CA Navels** – Book ahead. Fruit size is running on the small side 88/113, we are seeing large fruit tighten
- **Mandarins** – **Fruit quality is high and we are seeing good sales with this item. We are 100% into Tango/Murcott** and the fruit is much nicer than the end of the season clementines.
- **Lemons** – Fruit is coming from D1, D2 and D3, overall fruit is small with 75ct fcy being a deal on the carton but not at a piece cost. Overall there is a good crop and most shippers are size picking to hold up the small fruit market
- **Organic Oranges** – rain market,
- **Organic Lemons** – rain market,
- **Organic Mandarin** – rain market,
- **Org Grapefruit** – Good Supplies
- **Juice oranges** – we are seeing good sugar tests and quality

Cucumbers

- Supply has been very good.
- Few quality issues
- Market should strengthen this week as shippers are reporting lower volume arriving at ports



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Grapes

- As we enter February of this unprecedented season, demand continues to outpace supply for grapes. With Peruvian shipments starting to wind down and Chilean offerings well below previous seasons, I don't think we will see a point where volumes match demand until the week of 2/25. That is when we will see the first real arrivals of volumes from the south and start to fill the pipelines. That will just be the beginning of better supply. Don't expect to see real pricing taper off until we see March 5 or so. The next two weeks will be more of the same and some of the toughest we will experience. Hand to mouth offerings will be the norm on green and red grapes. I can't remember a time where availability is on a day to day basis. Vessels are being delayed sometimes two and three days. Ships are late leaving Chile because they are waiting for fruit to fill the ship. Another big issue has to do with the sizes that are arriving into the country. Most of the early pre-committed programs were based off of large and M/L grapes. There has been next to nothing arrive in M/L size grape. Most of the commitments are eating up the majority of large and that leaves us with XL and Jumbo type fruit. This has put real pressure on importers to fulfill those large customer's needs.
- Preseason commitments combined with much undersupplied market. However, supplies on globes and black seedless are at a point being able to widen the shelf space and move some tonnage through the system. The black seedless we are seeing this week are very good. Sizing is XL and bigger and color is full. Eating quality is also very good. Let's try to use these next two weeks to move blacks and globes.
- **Green Seedless**
This variety continues to be short. Green grapes will be light all the way to the end as the storage fruit is already being picked and packed. Peru for all intents and purposes is finished. Southern Peru has been battling color issues and have not sent all the fruit they could have. The proprietary varieties on green grapes in Chile is not close to where Peru is and we are seeing the lack of volumes in Chile as they continue to try and replace Sugraones and Thompsons with the new varieties.
- **Red Seedless**
The lack of flames is becoming very apparent. There just aren't enough other varieties to supplement the shortfall of the 4 and ½ million boxes they pulled out. Other varieties include Perlon, Royal Red, Rally and Queen Rose. Those varieties are good, but not nearly enough volume to fulfill the demand we are seeing in the US. It won't be until crimsons start to arrive in Mid-March that we will see good promotable volumes. We should start to see a little relief by the end of February on red grapes and just being able to have some relief should hopefully alleviate some of the frustrations that we are all feeling!
- **Black Seedless**



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This grape is in good supplies and needs to be loaded on any mixers that you have. The unknown seedless from Chile are excellent. Sizing is good as is eating quality. Please move black grapes on all your orders.

Green Beans

- Bean market is low with good supply and great offers out there.

Green Bells

- Market has been steady
- Quality has been good with most shippers, size is trending to smaller sizes.
- Demand is slowing. Supply is picking up in both FL and MX.

Leafy Lettuce (green, red, romaine)

- Good production next few weeks. Demand fairly good on green and red but remains below normal demand on romaine. Previous cold weather continues to show its residual impact on quality which is epidermal peel! Although growers are removing additional leaves to minimize the defect, expect to see light blistering and epidermal peel on outer leaves. This will appear as brown discoloration (10-15%) several days following and by arrival.

Iceberg Lettuce

- Very good supplies this/next week. Seeing slightly above weekly production numbers this/next week. Market soft while production remains at this level. Previous cold weather continues to show its residual impact on quality which is epidermal peel! Although growers are removing additional leaves to minimize the defect, expect to see light blistering and epidermal peel on outer leaves. This will appear as brown discoloration (10-15%) several days following and by arrival.

Mangos – Imported

- Peru's peak arrival volume passed last week and the market has been rising regardless on the East Coast. Due to all the delay problems on the West Coast, they are receiving many overdue containers and the pricing is lower out west.
- Volume leaving Peru will continue to fall off rapidly.



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- Mexico has also seen lower volume. Ataulfo quality has not been great with a lot of sap staining. Next week, there will be more fruit to harvest that was not rained on during the flowering, and quality and volume should return to normal.
- Promotions are not recommended on round mangoes loading week 8-12, concentrate on Ataulfo.
- April and May will have abundant round and yellow mangoes for promotion

MELONS

Cantaloupe & Honeydew

- Imports (Guatemala/Honduras) are with no quality issues, more availability 9/J9/12s. Honeydews from Guatemala/Honduras are extremely tight with processing sizes available (4s and Jumbo 5s), no spotting or signs of decay / underride.
- Honeydew 5/6/8 (Mexico) FOB Nogales
- Cantaloupe 9/9J/12s (Guatemala/Honduras)FOB FL
- Honeydew 5/6/8 (Guatemala/Honduras)FOB FL

Watermelons

- Mexican product crossing into McAllen & Nogales are seeing a supply interruption (lower volume) crossing into the U.S., minor quality issues (hollow heart/underride). Volume expected to continue light until mid-February. Honduras & Guatemala are in a shortage with cooler weather slowing production down. Limited availability into the South Florida ports.
- Texas (product of Mexico): 45/60ct bins and cartons:
- Nogales (product of Mexico): 45/60ct bins
- South Florida (Honduras/Guatemala) : 45/60ct bins:

Onions

- Peruvian- Good supply continues to come in- Some quality issues here and there, sizing profiles are in consistent every other week.
- Market is steady with no real demand

Organic Veg – California/Yuma (desert)

- Iceberg Lettuce –Limited supplies available, Market Steady



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- Leaf-Limited supplies (expect pro-rates) Market Higher
- Broccoli- Decent supplies available, Market Steady
- Cauliflower-Decent supplies, Market Steady
- Celery/Celery Hrts- Extremely tight supplies, Market Higher
- Cilantro- Good supplies available, Market Steady
- Green Cabbage-Good supplies available /Market Steady
- 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, and Oregon

Pineapples

- Market remains steady.
- Quality is good. Full range of sizes available.

Potatoes – Western

- Idaho- Much smaller sizing this year in comparison to previous years. Overall quality is good. There are some issues with Hollow heart and internal bruising occasionally but sporadic.
- Reds and Golds have good supply, quality is good on A size but there are some bruising in B's and C's.
- ND/WA has good quality on Reds and Golds with good supply and a steady market

Squash

- Production is good for both colors. Squash is in peak season.
- Quality is good on both colors, with scarring issues clearing up.
- Pricing should settle down a bit with better FL weather.

Stone Fruit

- This is where we can aggressively promote. We have good varieties and sizes on all three varieties including peaches, nectarines and plums. Sizes are mainly in 52ct and larger and quality has been excellent. Let's discuss promoting stone fruit over these next coming weeks.



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- Over the next two weeks, let's please focus on fruit that is in good supplies like black seedless, red globes, and stone fruit in an effort to alleviate some of the frustrations we are feeling with the current shortfall of red and green seedless varieties. We value our partnerships and know in time this deal will change and we must all work together to finish strong.

Tomatoes

TOMATO – FIELD GROWN

- Roma Tomatoes are consistent in light supplies with a bulk of the overall volume coming from Mexico as planned for the season.
- Grape & Cherry Tomato yields are mixed between farms with a steady supply overall.

TOMATO – GREENHOUSE

- Beefsteak & Stem quality is excellent out of Mexico.
- Stem market is still extremely high.
- Canada is planted, but will not start in a big way until the end of March / early April.