



Dale's Market Update

March 5, 2019

Apples

- Galas, Honeycrisp, Red Delicious, Gold Delicious, Pinks, Granny Smith, Fuji, Jonagold, and Braeburn available from Washington. Market is steady on most varieties and lower on Red Delicious.

Asparagus

- Freeze in Mexico has halted production/harvest. Weather forecast is warmer the next couple of days which will help, but will take some time to get supply back up to reasonable volumes. Adequate supply is in the hands of a few shippers. Shippers are handling back orders. Weather and temps will be what everyone is watching - stay tuned
- Sales are peaking at retail. Quality is good.

Berries

Strawberries - California:

- **Oxnard:** continues to recover from recent rain events over the last several weeks. Shippers will continue to clean up fields through this week, with the anticipation that next week, with no rain in the forecast, that they will see some improvement in quality. We do not expect to see an immediate rebound to volume, as the cooler temperatures have kept the maturation rate at a very slow pace. Estimates have been drastically reduced to the tune of 50%.
- **Santa Maria:** on paper, was schedule to start "scratching the surface" of their production soon but due to hail and snow in the Santa Maria district on Thurs; 2/21. This will impact the start in that region.
- **Central Mexico:** C Mex growing areas have seen temperatures as high as the low to mid 80's and it looks as if this will continue. This will lead to volume fall off as some of the lower elevation fruit gets "weeded out". size is also expected to decrease.
- **Florida:** Warm weather continues to drive production in Florida. Florida expects to continue having good numbers through the next several weeks.

Blueberry

- Chilean volumes will be dropping faster than anticipated. Hot weather is causing quality issues. Fruit that was scheduled to leave this week for early March arrivals has been severely reduced or cut completely. Watch for markets to start reacting next week as volumes continue to decline.
- Pint switch to 6oz should happen 2nd week of March
- Mexico volume will increase as well as Florida beginning

Raspberry

- volume will continue to increase week over week with peak in mid-April

Blackberries

- starting to slightly increase week over week, eating quality and condition continue to improve



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Broccoli

Market very active against light production. Unfavorable weather has caused lower yields and smaller sizing impacting supplies. Adverse weather in the central CA growing area will create some strong spring production fluctuations as well during the transition to Salinas. Overall supplies will be erratic and below normal.

Cauliflower

Very limited supplies as production slows from recent colder weather. As desert season winds down, market will remain very volatile and likely short through the spring transition to central/coastal California.

California Citrus- Domestic

We will see on and off showers this week but with limited effect to the harvest and fruit. Temperatures are returning to normal. Going forward we need mild temps without heat to allow this fruit to dry out and not bring puff more into play. We need to book ahead on large fruit. Export is in full swing and that will make the 56ct and larger tight. GOLD NUGGETS have begun this is the last of the premium mandarins and a great piece of fruit to drive sales.

Mandarins

- Fruit quality is high and we are seeing good sales with this item
- We are 100% into 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

Grapes

- This week we finally saw grape arrivals start to increase. Instead of taking orders hand to mouth, we were able to set some fruit up in advance. A big concern was ships being delayed that sent orders back in some cases by days. Having no inventory increased the frustration as we were at the mercy of the steamship lines. In the coming weeks with a few more ships arriving, having delays of a day or two won't send anyone into a scramble trying to cover orders that were on the books well in advance.
- We saw the largest increases in red varieties. Green grapes are still lagging behind but should start to show some improvement as we head toward the middle of next week. Overall quality on grapes has been very good and will remain that way for future arrivals. Grape harvest in the southern regions is now in full swing and we should start to see promotable volumes of red grapes start to arrive by weeks 8 and 9. Green grape promotions for the short term are still a bit scary, but we should be able to get more volumes by week 9 and 10 arrivals.
- **Green Seedless**
We are still seeing a shortfall in green grape arrivals to date. I think green grapes overall will be down this season as we will feel the effects of pulling out Thompsons and Sugraones. Green grapes targeted for long term storage are being picked and sent to the U.S. where they will be stashed away until after the marketing order on April 10. We will see strong arrivals for a couple weeks in March and then see volumes fall back again as we hit the end of March and beginning of April. With greens being short, importers that have strong storage programs



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will try to hold out as long as possible before cracking open the seal of storage. There are only a handful of those grapes in Chile and that will add to the frenzy in April.

- **Red Seedless**

Here is where we are starting to finally see improvements of volumes hitting the U.S. Promotions over the next several weeks are a good bet and should be planned. We still have to promote red grapes and stay ahead of it. Prices that have been given in advance are in line with promotable volumes for March arrivals. We are still feeling the brunt of almost 5 million flames gone from the arsenals. Queen rose, Perlou and Royal reds are trying to make up for the deficit, but there just aren't a ton of those varieties planted in Chile at this point. Crimson, once they start to arrive will make up for the lack of red volumes, but those won't arrive in good volume until later in March. The newer varieties such as Timco, Allison, and Krissy are arriving, but in big sizes. Jumbo and XL fruit is becoming the norm. Those varieties are still obtaining a premium as the fruit is rock solid.

Green Beans

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

Green Bells

- Supply of greens in the east has gotten much better over past two weeks.
- Good weather in FL with increased supply crossing Mexican border has caused lower prices for the first time in months.
- Supply should be steady for next few weeks, more shippers will start harvesting in two weeks.
- Demand has been slow for most of Feb., but typically that changes the first week of Mar. when temperatures begin to rise
- Quality, for the most part, has been good, though there has been some wind scarring and pitting due to a hand full of cold windy mornings

Leafy Lettuce (green, red, romaine)

Light to moderate supplies. Market very strong as demand improves against decreased supply side.

Recent 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

Much lighter supplies as desert winds down for winter season. Market strong with improved demand. Harvest hours have been limited due to iced mornings shorting daily pack-out. 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.



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Mangos – Imported

- Peru's peak arrival volume passed last week and the market has been rising regardless on the East Coast. Due to all of 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
- 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 so concentrate on Ataulfo
- April and May will have abundant round and yellow mangoes for promotion

Melons

Cantaloupe & Honeydew

- Honeydew 5/6/8 (Mexico)
- Cantaloupe 9/9J/12s (Guatemala/Honduras)

Onions

- Mexico starting with onions- Production is a bit slow due to cold temps
- Demand is moderate and prices are high on whites
- Peruvian Sweet onions starting to see a dip in production and supply - quality issues
- Should be about another month left - Mex Sweets coming on to fill the gap until Vidalia starts mid-late April

Organic Veg – California/Yuma (desert)

- Iceberg Lettuce: Limited supplies available, Market steady
- Leaf: Limited supplies (expect pro-rates), Market higher
- Broccoli: Decent supplies available, Market steady
- Cauliflower: Tight supplies, Market higher
- Celery/Celery Hearts: 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

- Bosc, Danjou, and Red Pears available from Washington

Pineapples

- Market remains steady
- Quality is good, full range of sizes available, promotable volume!



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Potatoes – Western

- Miserable weather in the plains, heavy snowfall in WI, CO, and across the Midwest states has slowed sales
- Demand is fair, supply and quality are good
- Idaho continues Potato Lovers month promo, supplies and quality have been very good

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 44 ct and larger and quality has been excellent. Let's discuss promoting stone fruit over these next coming weeks.
- Over the next two weeks, let's please focus on fruit that is in good supplies like 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

- Cool weather throughout FL growing regions have slowed production. Scattered rains through the weekend have caused further volume reductions.
- 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 are excellent out of Mexico
- Canada is planted, but will not start in a big way until the end of March/early April

Greenhouse

Cold weather in Mexico is the main contributor to availability issues and higher markets