



Dale's Market Update 5/13/19

APPLES

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

AVOCADOS – Imported & Domestic

The combination of Growers holding back fruit at the beginning of the month to raise market pricing, to the political upheaval on the border creating significant delays of product crossing from Mexico into the US, the Easter Holiday week harvest shut down and finally both Easter and Cinco De Mayo demand has created an extremely volatile situation. As most retailers have cut back or pulled Ads, the demand has softened and we're finally seeing the market adjust down.

BERRIES

Strawberries

- Salinas/Watsonville has started in a light way and will ramp up this month and peak beginning/middle of June.
- Santa Maria volume continues to increase daily. Quality and sizing are very good.
- Oxnard will be done after this week.

Raspberries

- Oxnard: continues to increase week over week. Peak volumes are around the first 2 weeks in June. Organic volumes are in peak for the next several weeks. Quality is good.
- Salinas/Watsonville/Santa Maria: Production has started light in these regions. They were pushed back a few weeks due to the cold winter. We will not see considerable volumes until June. Light OG raspberry production has started

BROCCOLI

Light supplies as production reaches into planting gaps. Production will swing up and down next 2 months as planting schedules were altered by rain and wet field conditions leading to gaps and gluts at times.

CAULIFLOWER

Current supply gap! Light supplies with production hitting planting gaps create by earlier rains and wet fields. Production will swing up and down next two months as planting schedules were altered by rain and wet field conditions. As fields come to maturity, supplies will be much heavier one week and very light another. Although ads will be difficult to set under these circumstances, short-term opportunity buys will likely become available.

CELERY

Light production continues through remainder of Oxnard season (May/June)! Although production will remain below normal, market has eased. Depending on demand, market will continue to adjust downward. The extended shortage situation this year was due to reduced acreage coupled with lighter yields from prolonged adverse winter weather. The transition to Salinas starts in June and will help going forward.

CHERRIES

Supplies of red cherries increasing every day with volume by the end of the week



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CALIFORNIA CITRUS – Domestic

Markets are beginning to tighten with both supplies and fancy fruit declining. Pack outs are moving to higher choice ratios and small fruit in general becoming very tight on the fresh market. We have promotable volume through May and then just weekly business in June. I expect imports to be available in the first week of July. Overall import supplies look to be solid on larger fruit 72ct and larger, small fruit tight and will be primarily used for bags programs.

- **CA Navels:** Peirone is shipping 100% late navel varieties, this is giving us the best arrivals and eating profile. Some mid-season fruit is still around and priced cheaper to get it moved.
- **Mandarins:** Halo will continue for another 2 weeks or so but will be fighting size most 36ct and smaller.
- **Lemons:** Push larger bulk fruit and bag lemons. Summer lemons will begin beginning of June, with fruit from Argentina and then Chile in July. Overall lemon supply looks stable and I don't see a repeat of the \$50-\$60 markets we have seen in the past.

CORN

- Season is in full swing out of California
- Weather has been very favorable
- Promotable volumes - excellent quality

CUCUMBERS

Supplies are steady with supers on the tight side and the market is moving up. Selects are starting to move better at slightly higher pricing.

Mexico crossings are starting to wind down for the season and buyers are moving east for their supply.

GRAPES

Imported Grapes: As we are winding down on Chilean grapes everything has been holding strong. 5/20. Quality on red and green still strong.

Mexico Grapes:

- Grapes are starting a little behind last year with a big crop. Promotional opportunities all of June on red and green
- Should finish 2nd week of July
- Overall Grapes – Promote in June Red and Green
- Greens – Just starting in light way
- Reds – crossing week of 5/13

Coachella, CA Grapes:

- Most growers to start 5/22 with their Red ranches.
- Mostly market Grapes - Season seems 8-10 days behind.
- Greens - A light start most will get going week of 5/20.
- Blacks will begin around the end of week 5/20.
- Let me know your volume and your ideas for this program.

LEAFY LETTUCE (green, red, romaine)

Good production next few weeks. Production in Santa Maria and Salinas. Quality only fair to average due to previous adverse weather (rain, cold, warm), resulting in shorter shelf life on product.





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Iceberg Lettuce: Good production next few weeks. Production in Salinas and Santa Maria. Quality only fair to average with shorter shelf life/discoloration. The prolonged adverse weather (rain, cold, warm) has had an effect on quality

MANGOS

Mexico – volume surged this week. Peak season is here. Time to promote!

Prices have fallen significantly across the board and there are very sharp promo opportunities available

MELONS

Cantaloupe & Honeydew

- Domestic (AZ) Cantaloupes are expected to get started with light supply by the end of week 19 (10th)
- Honeydew 5/6/8

WATERMELONS

Mexican supply through AZ is peaking early. Expect FOB's to remain at current lows through week 20, gaining strength in week 21 as supply winds down. Supply through TX is steady at slightly higher FOB's than AZ.

Expect market to remain steady through week 21. Florida supplies are increasing with ample supply of small fruit. Expect market to remain steady at current levels through week 21.

ONIONS

- Market is steady with no real demand
- Whites have come off a bit but still high

ORGANIC VEGETABLES California Lamont/Yuma AZ (Desert)

Transition from Desert up to Salinas has started – expect some orders to load both locations for the next week or so

- **Iceberg Lettuce:** Tight supplies available, Market Higher
- **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:** Limited supplies available, Market steady
- **Pineapples:** Expect availability to remain tight for the next week or so, quality is good, no major issues, but planning is key to ensure availability on your requested sizes
- **Potatoes Idaho:** occasional quality problems, it is shed-specific - typical storage problems this time of year

STONE FRUIT

Our 2019 California Stone Fruit season is under way. By mid-May you can expect ad opportunities on nearly our full lineup as well as Memorial Day! Full front-page ad opportunities for organic and conventional fruit is always a great way to excite shoppers for FRESH snacking this summer. We have had exceptional weather to start this season. We look to mirror the same volume as last year with trending 3 to 4 days earlier. Quality looks to be outstanding as well. Nice way to start the season!



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- **Yellow Peaches:** Starting to pack more in Arvin and Cattleman area and this weekend here in the Valley – with supplies increasing throughout the weekend and into next week. Sizing peaking on 64's through the rest of this week. Size will start to increase to 56/48's in the weeks to come. The fruit is nice out of the Arvin/Cattleman area but the better fruit will be in the valley as most everyone will start this next week.
- **White Peaches:** Supplies are light with increasing numbers as we move into the weekend each. Sizing peaking at 64's...56's/larger to follow in the weeks to come.
- **Yellow Nectarines:** Just starting for the most part this weekend. Volume will increase considerably within the next (10-14) days.
- **White Nectarines:** Looks to be starting this weekend to the first part of next week. Fruit is plentiful on the trees – just a little too green to harvest at this time. Sizing will start with 64's/smaller – very few 56's/larger in the beginning.
- **Apricots:** Still a “slow-go” getting started and supplies will be on the lighter side through the weekend. Supplies will start to increase throughout next week and we'll have good volume by the end of next week. Sizing is peaking on 88's and smaller at this time. Second set that will start next week will have larger sizing throughout.
- **Plums:** Estimated start date end of May – first of June.

TOMATOES

ALERT!

Tomato suspension Agreement:

An effective date of May 7, 2019 has been set to terminate the current U.S.-Mexico-Canada (USMCA) Tomato Suspension Agreement from 2013 unless the United States and Mexico can come to a new agreement where both parties agree to renew operating terms and enforcement procedure, strengthening anti-dumping measures for tomato imports into the United States. As of this week, no new agreement has been made, resulting in the proposal of duties and tariffs being imposed on imports ranging between 17%- 40% by July, however it is unclear what that means for the costs of imports as soon as next week.

Peirone will keep you well informed as we receive additional information on this situation.

TOMATO – Field Grown

- FOBs remain below double digits
- Sizing remains on the larger side.
- Steady flow of Roma imports across the southern US border influences Florida Roma offerings, which remain unchanged this week. Roma are light in production with more growers starting this week.
- Grape and Cherry harvests have slowed due to cooler temps. Markets are unchanged, plenty of availability.

TOMATO - Greenhouse

- Canada in full swing. Great quality and pricing on Beefsteak and Stems.