



# Dale's Market Update

July 5, 2019

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## APPLES

- Galas, Honeycrisp, Red Delicious, Gold Delicious, Jazz, Pinks, Granny Smith, Fuji, N.Z. Smitten, Opal, Koru, available from Washington
- Market is steady on most varieties, lower on Red Delicious and Honeycrisp
- Red Delicious, Macs, Jonagolds, Evercrisp, and Ruby Frost available from PA/NY/MI.
- N.Z. Chilean Galas, Cranny Smith available

## ASPARAGUS

- Baja California (Northern): nice quality, light supplies
- Baja California (Southern): marginal quality, winding down quickly
- Canada: season closing out over the next 7 days
- Guanajuato, Mexico: average quality with dry weather, yields/volume below budget
- Peru:
  - seasonably cool weather, low supply from Southern Peru
  - steady supplies from Northern Peru
  - high demand/higher pricing from Europe/other export markets are allowing Peru to divert more production away from the U.S. market

- Michigan: season closing out over the next 10 days
- For the week ahead:

Season closing out on all domestic/Canadian production. Steady to lower imports from Peru.

Improving European/other export market demand.

Improving North American demand for Peruvian and Mexican asparagus as domestic production winds down. Pricing moving higher to historical/sustainable levels.

## AVOCADOS – Imported & Domestic

Coming off historically high prices due to the Mexican 'old crop' finishing up more quickly than anticipated, especially on smaller sizes, the California crop with a shortened season and Peruvian imports not as strong as projected, expect to see some pricing relief in the next two weeks as the Mexican new crop comes into production. Fruit sizing will be smaller and 60's and 70ct will become much more prevalent. As demand continues to be very high, regardless of the market price, expect pricing to remain firm through Labor Day.

## BANANAS

- Market is weaker
- Supplies are beginning to exceed demand
- Quality has been good
- FOB markets in the \$7.50 - \$8.50 range



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## BERRIES

- Strawberries: continue to struggle due to the past weather of rain and heat. Industry looks to normalize as weather returns to "normal" and 4th of July demand dissipates. However, look for volume to remain somewhat snug thru August.
- Raspberries: finally with "normal" weather in California, volume is now increasing daily. Volume should be good for the rest of the month.
- Blackberries: Wet weather in the Southeast continues to keep things up and down over in the South East. California seems to be turning around now with the nicer weather in the Central Valley. The coastal region of CA and the big volume area is still delayed yet again due to past wet and hot weather.
- Blueberries: good volume in NC, GA & Jersey. Pacific Northwest has now started with British Columbia right around the corner. Good volume to promote this month and next.

## BROCCOLI

Moderate to good supplies. Market attractive next 2 weeks. Quality has also improved since earlier heatwave. Higher pack-out on crowns with good sizing and improved tight beads with current favorable weather.

## CARROTS

Fields remain steady with supply and quality. Suppliers have transitioned to summer growing regions. Prosser, WA is tentative to open Mid- July.

## CAULIFLOWER

Moderate to good supplies! Overall quality has improved from early heat. Mostly good quality, some discolored/yellowish curds. Market volatility will continue as production surpluses and gaps develop from week to week.

## CELERY

Supplies have improved with Salinas and Santa Maria in full production now. Market has fallen significantly from recent week. Should have promotional opportunities going forward.

## CHERRIES

- Red Cherries: Washington/Oregon in their peak and shipping post-4<sup>th</sup>-of-July ads. Good volume for the next 3 weeks
- Rainier Cherries: Peak is on the downslide with market next week.

## CALIFORNIA CITRUS – Domestic

Markets are still tight with both supplies and fancy fruit declining. We are on the last two weeks shipping on CA navel crop. Peirone is well prepared for your import needs if you have communicated



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July 5, 2019

your needs and talked through this with us. We are shipping imported clementine's with great success as well as imported lemons. The CA lemon market is extremely tight and requires lead time.

- CA Navels: final last 2 weeks shipping
- Mandarins: shipping imports out of Ca and Philly and we are seeing quality improve with the early varieties
- Lemons: Let's set summer promotions, push larger bulk fruit and bag lemons. Shipping fruit from Chile.

## GRAPES

- Coachella, CA Grapes: The grapes in Coachella still going strong and look to start cleaning up the 3rd week of July.
- New Crop California Arvin District
- San Joaquin grapes are underway
- Starting Red, Black and Green this weekend out of California. We will have all three colors starting 7/8. Overall big nice crop.

As we transition into California this week, we can bounce back and forth on product from Mexico to California to take advantage of aggressive pricing, but fresher fruit will be in California. We are hearing that the overall crop is another big one, but not record setting. The overall crop is the same timing as last year, but this can change week to week. Overall quality is expected to be very good due to the plentiful amount of natural water with the proper PH levels that allow the vines to absorb all the nutrients. In previous years, the industry had to use well water that had poor PH levels and the plants were not able to get the nutrients they needed. That should all change this year with all the rain we got during the winter. We will see a lot of opportunity for Ads this year.

## GREEN BEANS

Supply is plentiful.

## LEAFY LETTUCE (green, red, romaine)

- Light supplies continue as previous heat-wave has impacted yields and production. Market very strong and well above normal.
- Will see some heat-related issues and reduced yields next few weeks. Seeing some lighter weights, smaller sizing and lighter color as growers remove additional leaves and/or reach into fields early. Production in Santa Maria and Salinas. Planned reduced summer acreage through the fall to offset normally lighter demand from local deals.



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July 5, 2019

## ICEBERG LETTUCE

- Below average supplies, strong market! Recent heat-wave caused some heat-related damage and reduced supplies.
- Seeing some lighter weights, variable sizing and lighter color. Some shorter shelf-life due to stress on product from recent heat-wave. Should see improvement in quality/condition in a few weeks as current weather has been favorable. Production in Salinas and Santa Maria.

## MANGOS – Imported

- Volumes are peaking on round mangos; however Mexican packers are trying to slow movement due to low markets.
- MASSIVE promotion opportunity right now and for the foreseeable future.

## MELONS

### Cantaloupe & Honeydew

- Domestic (AZ) Cantaloupes and Honeydew are beginning to wind down as we transition to the San Joaquin Valley (CA) where supply and quality are very good

## ONIONS

- Walla Walla Sweets are in full swing
- New crop CA is going strong, good supply, good quality
- Market is strong on Jumbo/Col, demand exceeds supply

## ORGANIC VEGETABLES – California Lamont & Salinas

- Iceberg Lettuce: Good supplies available, Market Steady
- Leaf: Decent supplies, Market Steady
- Broccoli: Limited supplies available, Market Higher
- Cauliflower: Limited supplies, Market Higher
- Celery/Celery Hearts: Tight supplies, Market Higher
- Cilantro: Limited supplies available, Market Steady
- Green Cabbage: Limited supplies available, Market Steady
- Mix (Chards, Kales, Parsleys): Good supplies, Market steady
- Red Beets: Limited supplies available, Market steady

## PINEAPPLES

We are now in the summer-time lull in availability. No promo opportunities between July through early September. This is due to yields coming on earlier than expected during the months of May and June to date. Vessel delays are also playing a part in availability issues.



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July 5, 2019

## STONE FRUIT

- **YELLOW PEACHES:** Steady supplies. Quality good. Sizing remains 48's/larger. Varieties include: Elegant Lady, Candy Princess and Sierra Rich. We are seeing deals here with several shippers.
- **WHITE PEACHES:** Supplies good and more volume coming. This is the White Flesh push time with excellent supplies, strong, sweet varieties now through August. Sizing is large – 48's/larger. Varieties include: Pearl Gem, Snow Beauty, Snow Blaze, Snow Princess and Glacier White.
- **YELLOW NECTARINES:** Supplies are fair to good. Quality is good. Several varieties going like the Sugarine variety and moving right into the Honeylicious variety by mid-July. This will give us steady supplies but not an overabundance. The next large volume variety – Honey Royal (Est. start date 7/16)
- **WHITE NECTARINES:** Just like White Peach – This is PROMO TIME as well - now through August. Excellent quality and flavor. Varieties include: Crimson Pearl – with Majestic Pear and Arctic White starting mid-July.
- **APRICOTS:** Supplies plentiful. Sizing 72/larger. Varieties include: Corals, Summer Gold and Brittany Gold. \*Note: Brittany Golds – sizing with start to fall off a bit. Availability now through August.
- **PLUMS – RED:** Supplies remain limited. A little in between varieties at this time, but supplies will start to increase with Red Phoenix variety – estimating to start around (7/15).
- **PLUMS – BLACK:** Supplies are steady and increasing in the weeks to come. ALL varieties are RED FLESH – EXTREMELY SWEET and very nice fruit! The majority of our Plums are “Pluot” varieties so they are very sweet and very delicious.

## TOMATO – FIELD GROWN

- Round market has strengthened
- Roma are limited but forecasted to expand in July as the regional programs become a factor
- Grape tomato size is improving, moving past the larger-sized fruit harvested in previous weeks. As weather has improved, so too have the packouts, which is easing the pressure of an increasing market.
- As transition progresses to regional programs, western supply becomes more of a factor. However, it is yet to be determined how subtle or drastic the 17.56% Mexican Tariff set by the USDC for tomato imports will affect the domestic market in the weeks ahead.

## TOMATOES - GREENHOUSE

Canada in full swing. Great quality and pricing on Beefsteak and Stem.