

Dale's Market Update

September 16, 2019



APPLES

- Washington fresh apple crop estimated at 137 million boxes, nearly 20% increase from 2018. With the increase in volume and softer demand from export, (at least currently), overall market should be softer with aggressive opportunities and promotions. Peak sizing on many varieties, i.e. galas, pinks, golds, and grannies, are down 1-1 ½ sizes in profile. Honeys and fujis about normal sizing profile. New crop honeys and galas now in good production. New crop fujis and grannies starting this week.

BERRIES – Conventional & Organic

- Strawberries: Starting off tight. Supplies will continue to downtrend week over week as Northern District winds down for the season. 2-3 weeks out from seeing Oxnard crop come on, however, volumes will remain low.
- Organic Strawberries: Similar position as conventional. Starting off oversold through the week - prorates anticipated
- Raspberries: Starting off with lower-than-anticipated supplies and will hover around slightly lower supplies for the next few weeks. Fall peak on track for October into November. Possible prorates – do not suggest any promoting at this time.
- Organic Raspberries: Supply coming in strong and steady with no issues in filling demand. Slight reduction anticipated over next few weeks, however, still strong for organic volumes. On track for peak ramp-up end of September into October.
- Blackberries: Good volume. CA is expected to come off and downtrend week over week leaving us with lower supplies. This will continue over the next few weeks until we see CMEX ramp up end of September thru October. Expect slight gap period between the two growing regions.
- Organic Blackberries: Good volume. Officially past the peak and will continue to downtrend the remainder of the year.
- Blueberries: Starting off the week with good availability on 6oz and pints. We continue to drop in overall volume out of PNW. CMEX and Peru are producing small numbers and will continue to uptrend week over week.
- Organic Blueberries: Additional production over weekend has us starting off with availability this week. Overall volumes are expected to downtrend thru September.

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BROCCOLI

Market on the rise with very good quality. Sizing between 5.5" and 6."

CARROTS

Fields remain steady with quality and supply. Running in Salinas, Lancaster, Avenal, and Washington. No supply issues.

CAULIFLOWER

Market continues to firm up. Limited supplies for the next two weeks. Volume will be limited, with 70% being 12's, pockets of minor curd discoloration, and very occasional cracking and mold likely to increase with weekend heat. Crews are being very selective reducing overall supply.

CELERY

Good production and quality! All sizes of celery stalk in good supply and promotable. Moderate Lygus damage still being seen, but crews are being selective at packing to address damage when seen, no effecting supplies overall. Celery Hearts are in light to limited supply for the next two weeks. Quality and sizing continue to be good.

CALIFORNIA CITRUS – Domestic/Imported

Fruit is still arriving from Chile and Peru on mandarins and navels. Demand exceeds supply as Chilean crop estimates were small than expected and port delays continue. The transition has been made from clementine's into Murcotts. Lemons from Chile, Argentina, and Mexico are in the country as well. Overall, the quality is nice and the fruit is holding up. There is higher frequency of seeds in the mandarins and green on the lemons. Our inspectors are working hard and we will select lots with minimal greening and seeds. Let us work with you to push sales by planning ads on navels and mandarins.

- Grapefruit: Plenty of fruit available shipping out of Indio and Riverside
- Organic Grapefruit: Good supplies
- Lemons: Peaking on 140s. 115s are very tight. Shipping fruit from CA, Argentina, Chile, and Mexico.
- Organic Lemons: Supply is very tight - markets are high and moving higher
- Limes: Crop cycle over, product is tight as new crop is coming into production
- Mandarin: Shipping imports out of CA. Our inspectors have eyes on the fruit and we are seeing better quality as they are now Murcotts.

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- Organic Mandarin: Done
- Organic Oranges: We are shipping Valencia's at this time.

CUCUMBERS

Supply is good - #1 product in good demand with light supply

GRAPES

- **Green Seedless:** There are several varieties out there now, but one thing in common, is that quality is very good. Great size on the berries with good finish and flavor.
- **Red Seedless:** The Flame Seedless have been very good this season and most will finish picking this week. The big round berries are full color with good 'pop' to the bite and great taste. There are several newer varieties including Krissy, Magenta, Alison and Sweet Celebration to fill in before the Scarlets are expected to get underway in about a week or so. Grape quality is outstanding right now so it's still an optimal time to promote red grapes!
- **Black Seedless:** The Black grape crop continues to impress with big barrel-shaped, well-colored, crunchy berries. The fruit has excellent flavor and very sound condition.

LEAFY LETTUCE (green, red, romaine)

Moderate to light supplies on romaine and romaine hearts for the next two weeks. Romaine showing large head size, while romaine hearts are showing medium sizing. Crews are being selective, as insect, tip burn, Sclerotinia, Botrytis and seeders are being seen in few lots. Good to moderate supplies for green leaf expected for the next two weeks. Quality and sizing continue to be good, with good size heads and color being seen. Mildew and insect pressure continue to be anticipated issues. Red leaf will be light supplies, quality and sizing continue to be good, with good size heads and color being seen. Mildew and insect pressure continue.

ICEBERG LETTUCE

Moderate to light supplies for the next two weeks. Heads are fairly firm, with light green color and uniform sizing, mostly 24's available. Pockets of insect, tip burn and mildew pressure possible.

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MANGO

- Earlier this month, we saw a serious tightening in the mango market. Supplies are not lower than prior years, however, demand is strong enough to see a demand-exceeds-supply scenario.
- Mexico is nearing the end and there were more heavy rains in Sinaloa this past weekend. Operations are winding down soon.

ONIONS

Market is steady – demand is moderate, supply is good and quality is good.

ORGANIC VEGETABLES – California Lamont & Salinas

- Iceberg Lettuce: good supplies available, market steady
- Leaf: decent supplies, market steady
- Broccoli: good supplies available, market steady
- Cauliflower: limited supplies, market higher (possible pro-rates)
- Celery/Celery Hearts: demand exceeds supplies, market higher
- Cilantro: limited supplies available, market steady
- Green Cabbage: good supplies available, market steady
- Mix (Chards, Kales, Parsleys): good supplies, market steady
- Red Beets: extremely tight supplies available, market higher

PEARS - Domestic

Washington has started with Bartletts, Anjou, Bosc, and Red Pears. Promotional volume and quality available.

PINEAPPLE

- Promo opportunities are finally becoming available. Oct. & Nov. should be a great time to promote.
- Quality has been solid with nice brix and Markets are finally starting to stabilize.

POTATOES

Idaho storage winding down – new crop looking to start early to mid-September

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STONE FRUIT

- Yellow Peaches: Fair/steady supplies now through September, but most are on the down stretch of the season.
- Yellow Nectarines: Much like Yellow Peaches, there will be fair/steady supplies now through September. Sizing is peaking on 48/56's and some larger.
- Black Plums: Great supplies with size ranging from 20's to 60's. Delicious sweet varieties with most varieties also crossing over to our Pluots. Varieties include: Blackberry Burst and Black Onyx (just starting). Varieties coming soon: Angelinos, Black Jacks, and Midnight Jewel. September varieties: Black Honey, Howard Sun, and Autumn Bliss.

TOMATOES

- A new tomato suspension agreement has been reached.
- 30-day comment period on the US DOC decision, expiring 9/19/19 (unlikely to change/amend/revise/etc.)
- Mexican tomato exports will be subject to border inspections.

Tomato – Field Grown

- Weather conditions continue to disrupt supply. Impacts from Hurricane Dorian were not substantial, FL & GA were spared, however NC received the majority of its rainfall.
- Although harvests are scattered over several growing regions, summer programs remain light and demand is strong, lifting the market.
- Round tomatoes are being harvested early because of the hot weather in the region bringing forth a flush of fruit. Quality is mixed, overall, and mostly fair.
- Roma volumes are light, but better supply from the West is helping to ease the market causing FOBs to come off a few dollars from last week.
- Grape & Cherry tomatoes are steady.

Tomato – Greenhouse

- Some volume issues as Canada enters the hotter weather.
- Mexico is not quite ready yet, we should see more and more volume as we move forward.

Happy Selling!