



Dale's Market Update

September 1, 2019



APPLES

- Washington fresh apple crop estimated at 137 million boxes, nearly 20% increase from 2018. With this huge crop, peak sizing on many varieties will likely be down 1- 1 ½ sizes. New crop Honeys and Galas are getting started. Fujis seeing a gap between storage and new crop and will likely be very short. New crop Fujis are still 2-3 weeks out.

ASPARAGUS

- Supplies will remain tight out of Peru. Cold weather has continued to hamper production and harvest. This looks to continue until mid-Sept when Spring starts in Peru. Week to week supply will be sporadic and somewhat unreliable for spot market orders. Most supply coming right now is already sold and satisfying current contract business. Very little left over.
- Mexico has had a decrease in harvest and production as well – weather being the main factor. Excessive rain and hail have damaged some fields. This decrease has in turn put more pressure on Peru to cover West coast customers, which in turn drives the Peruvian market up in price. No relief in sight for Mexico or any preparations to recover from the shortage. All local deals in MI, Canada are done and Jersey dwindling down as well. Demand exceeds supply across all regions right now.

AVOCADOS – Imported & Domestic

- Inventories will be shipped by the first week of Sept. Fruit from California has remained predominantly on the West coast, but some has trickled East earlier in the season. This has allowed Peruvian arrivals to concentrate on the East coast and Midwest. Peru was better received this season than in years prior. Size curve has been heavy to Jumbo sizes, with 36/32/28's making up the bulk of arrivals. Mexican Summer Crop aka "Flora Loca" has been heavy to smaller sizes, with 60's and smaller making up the lions-share and very few #2's. Currently domestic inventories are elevated with the majority of fruit being either Small Mexican or Large Peruvian.
- Over the next few weeks, the industry will work through the lower demand items and transition to one principal crop, the Aventajada bloom from Mexico. Aventajada is an early maturing bloom of the larger "normal" crop that makes up the bulk of the Mexican season. Fruit is more traditional in shape, with more of a teardrop shape in appearance. The release date for this bloom is August 15th; however, the early arrivals will still trend heavily to smaller sizes. By September, Mexico will be dominating the market, with very little competition from other sources. There is some concern in the industry for how harvest volumes and field cost will shape out once Mexico is the primary supplier in the market. Chilean fruit may enter the USA during this time, but there is a preference for European markets for most Chilean growers.



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BERRIES – Conventional & Organic

- **Strawberries:** Conventional are starting off in aligned position, need to stick to planned volume. Industry volumes are decreasing and will not show increases until Fall crop kicks in around the first part of October. Organic volumes continue to trend downwards. Expect prorates due to warm nights affecting quality. Smaller sizing being reported.
- **Raspberries:** Conventional are starting off aligned for the week. Volume starting to stabilize compared to previous weeks. 2nd peak in Oxnard is done. Santa Maria/Watsonville will continue to trend downwards. Baja harvesting started with CMEX to follow in a few weeks. Organic raspberries are down trending into September – still on track for Fall production peak. Baja has started with CMEX to follow in a few weeks. Warm nights are affecting quality.
- **Blackberries:** Conventional and Organic volumes are appearing to stay strong with CMEX starting in a few weeks. Warm nights are affecting quality.
- **Blueberries:** Conventional continues to see volumes downtrend as volumes are being grown in the region. Officially passed PNW peak and down trending week over week. Starting to see small volumes of Peru and CMEX starting. Organic continues to see volumes drop as our main regions are Oregon and Washington. Volume will continue to downtrend the rest of the year. Quality concerns on both Conventional and Organic due to weather issues in the PNW.

BROCCOLI

Good production next few weeks. Starting to see more crowns as sizing has improved. Current favorable weather has also improved quality from recent weeks – seeing mostly very good quality.

CARROTS

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

CAULIFLOWER

Strong flush putting heavy pressure on the market. Attractive pricing to move additional volume. Will see market rebound as current flush passes. Usual reduced summer acreage top offset lighter demand from regional growing areas.

CELERY

Ample supplies next 2 months! Very nice quality and condition. Promotional volume and quality. Demand is up year over year.

CALIFORNIA CITRUS – Domestic/Imported

Imports arriving from Chile, South Africa and Peru on clementine's and navels. Market is firm and demand exceeds supply due to port delays and transition from clementine's into Murcotts. Lemons



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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.

- Lemons: Let's continue summer promotions. Shipping fruit from CA, Argentina, Chile, and Mexico
- Organic Lemons: Supply is very tight; lead time necessary and will be this way through September. Markets are high and moving higher.
- Limes: Crop cycle coming to an end, product is tight as new crop is coming into production
- Grapefruit: Plenty of fruit available shipping out of Indio and Riverside
- Organic Mandarin: Done

CUCUMBERS

- Supply is good and demand has increased/improved over the past week
- Supply is coming from many different regions in the mid-west, Northeast, and Canada, although rain over the past week has slowed harvest and some shippers are scrambling to cover orders
- Quality has been good for most shipments
- Some older fields have shown occasional scarring and light color

GRAPES

With the end of August at hand, we are finally getting a break from some of this long summer's heat. Skies are blue with daytime temps in the mid-nineties. Ideal grape growing weather is prevailing and the transition to our fall varieties is underway. We should be back to full production following last week's harvest slowdown and the last of our early varieties will finish shipping this week. That being said, this also marks the time we encourage all retailers to start thinking about Fall promotions!

- **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. Grape quality is impressive right now so it still is an optimal time to promote red grapes!
- **Black Seedless:** The Black grape crop is outstanding with big barrel-shaped, well-colored, crunchy berries. The fruit has excellent flavor and very sound condition.

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GREEN BELL PEPPERS

Bells are in good supply across the Northern tier of country.

LEAFY LETTUCE (green, red, romaine)

Very good supplies with improved yields and sizing. Market down and attractive for promotional opportunities. May still see some regional deals affected by previous hot weather which would change demand out West. Production in Santa Maria and Salinas.

ICEBERG LETTUCE

- Moderate to good production next couple of weeks
- Quality mostly good, occasional condition defects such as russetting and bruised ribs
- Average weights, cello 40-44lbs
- Production in Salinas and Santa Maria

MANGO

- Market is strengthening in anticipation of the shutdown of the southern Sinaloa pack sheds which is not happening and will cause volumes to drop moving forward
- Crop is running 70+% in 5s, 6s, and 7s. Smaller sizes are going to be extremely short. There will not be enough 8s and smaller until Brazil arrives in volume in late September.

MELONS

- Cantaloupe & Honeydew: transition to the San Joaquin Valley (CA) where supply and quality are very good

ORGANIC VEGETABLES – California Lamont & Salinas

- Iceberg Lettuce: decent 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: good supplies, market higher
- Cilantro: limited supplies available, market steady
- Green Cabbage: decent supplies available, market steady
- Mix (Chards, Kales, Parsleys): good supplies, market steady
- Red Beets: extremely tight supplies available, market higher

PEARS - Domestic

Danjous from Washington finished for the season this week. New crop red pears and Bartletts available from Washington.



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PINEAPPLE

- We are now in the summer-time lull in availability. Promo opportunities should start by mid to late September.
- Quality has been solid with nice brix – markets are high, but finally starting to decline, albeit slowly

POTATOES

- Idaho storage winding down – new crop looking to start first of September
- Red potato market is active and tight – supply is limited right now

STONE FRUIT

- Yellow Peaches: Fair/steady supplies now through September, but most are on the down stretch of the season. Sizing peaking on 48/larger.
- 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 30's to 40'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 – Greenhouse

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

Happy Selling!