

FRESH LINK MARKET REPORTS

December 1st, 2025 Fresh-Link Fruit 559.306.6900 I infoFLF@freshlk.com

Market Update – Table Grapes

Week of December 1–7

California is down to its final stretch, with quality fading and most remaining clean fruit already committed, pushing retailers firmly toward imports. Peruvian exports remain well behind last season, with Ica still 2–3 weeks delayed and week-47 exports under 2 million boxes—far short of the 3 million needed to soften December markets. As a result, spot pricing is expected to stay strong through Christmas until promotable South American volumes arrive in early January. Early Peruvian reds (Flames, Timco, Allison, Jack Salute) are showing very good quality, keeping premium FOBs in the mid- to high-\$30s, while greens remain the tightest item with no workable California fruit and limited Sweet Globe/Ivory availability pushing top-tier markets into the low-\$40s and Autumn Crisp even higher. Chile is beginning in week 48, but meaningful relief is still several weeks away.

Citrus

California Navels hitting consistent packouts with good floor counts for the upcoming week. Some growers will be starting their export programs this week which should leave some nice choice fall out. Fruit has sized up with production reaping more 72s and 56s, smaller sizing starting to decline. Cold weather has shortened gas times considerably with an expectation of being done within the next two weeks. Lemons still needing 24 – 48 hours of gas with the sizing beginning to peak on the larger spectrum. There is still plenty of smaller sizes available at this time. Grapefruit harvest peaking in the 27/32/36 size spectrum with excellent quality. Cara's have started up in a limited way with sizing peaking on the mid to large size.