

FRESH LINK MARKET REPORTS

September 25th, 2024 Fresh-Link Fruit 559.306.6900 I infoFLF@freshlk.com

Market Update for Table Grapes

Week of September 23 – September 29

Most growers are completely done with California Valencia's, just a few available sporadically. Navels are about 2-3 weeks away from harvest. Navels look like they will be peaking on the mid to small size for most the season. Florida will begin harvest on Hamlin and Navel oranges mid to late October, Hamilins expected to run through December. Florida Navels will be very limited through November. California Mandarins look to be starting harvest in the last week of October but may get pushed to the first week of November – still some availability on imports on the East Coast but very limited. Florida expecting to start harvest on Fallglo Tangerines at the end of September, Early Pride and Bingo Mandarins sometime in October depending on sugar tests. West coast D3 Lemons movement ramping up this week with D1 Lemons scheduled to start mid-October.

Red Seedless

Looks like approximately 500k more boxes of Scarlet Royal are currently in cold storages. Marketers have been sending the message that red seedless supplies would be light all season long, so the spot market has never really dipped below the low 20s. Higher FOBs could be another reason for more inventory, but growers have confidence that this fruit can hold longer than many new proprietary varieties, so they are in no rush to drop the market. Look for spot sales to range from the low to mid 20s on Scarlets and the mid to high 20s for Allison and other proprietary varieties. As greens sales keep outpacing red, supplies should get us into December.

Green Seedless

The challenging weather that table grape growers have dealt with all season long seems to have impacted the quality and availability of many green seedless varieties. Pack outs and arrival quality on Great Greens have been a disappointment for some growers, as they fought to get brix over 16. Growers have picked through most of the Great Greens, which will leave us with less fruit in October. The Autumn King crop is just getting going and early indications look good for quality and eating experience. This should keep consumers engaged and keep inventories under control. Autumn Crisp also seems to have been impacted by the early heat waves, as berry size and flavor have both been inconsistent. Currently, Great Green, Sweet Globe and Autumn Kings are selling from the mid to high 20s for good XLG/Jumbo lots. Growers with Autumn Crisp, Stella Bella and Sorbet are asking \$2.00 to \$4.00 higher. Green Grape spot pricing is expected to trend higher in October, with the prediction of a shortage in December.

Black Seedless

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Black seedless volumes are down by more than 750K boxes compared to previous storage levels. Although Autumn Royal, Sweet Favor and Adora are excellent eating varieties, retailers have not spotlighted them enough to create significant demand, resulting in many growers pulling underperforming varieties like Sweet Sapphire. The remaining supply of black seedless spot market has been ranging from the high 20s to the low 30s in the past 4 - 6 weeks. Although October is typically a great time to promote black seedless, retailers may not have the volumes to support those aggressive retails from past seasons.

Citrus

Valencia's will have very limited availability with the gap between California oranges expected at the end of this month. Navel estimates have been reported, however, probability of harvest start is roughly in the next 3 - 4 leaving a gap of at least 2 weeks or more. D3 Lemons have begun harvest and should get in full swing within the next two weeks. Limited availability on Off-shore Mandarins on both the west and east coasts.

Melons

Bloom drop has caused a significant drop in yields on lopes in the west. Sizing has shifted more towards R9s & 12s, with J9s being very tight. Quality on the fruit is great to excellent.

The desert deal on watermelons is done. The extreme heat we endured for the last 12-14 days cut a lot of growers season short by 10 days or so. Majority of seedless watermelon are coming from Central Valley/Northern California with a few growers still going in Bakersfield. After the 4th of July, the market and demand has significantly softened.