FRESH LINK MARKET REPORTS

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**Market Update for Table Grapes**

**Week of March 31 – April 6**

**Since late January, table grape pricing in the U.S. has been dismal. Even the best quality fruit could barely hold at profitable levels. Preseason programs will save many growers because they were set significantly higher than the most recent spot markets, but overall results in the U.S. this year will be quite disappointing. Inventories are still very high for many of the larger importers, but supply and demand for quality fruit seems to have found balance. Over the past two weeks, exports from South America have dipped and we can expect the spot market to finally adjust higher over the next four weeks. Keeping in mind that only good quality fruit will demand these higher prices, as there will still be an oversupply of weaker distressed fruit in the market. Reports from Sonora, Mexico indicate a start date for both red and green seedless around the 15th of May, but they will only be scratching the surface. We won't see any meaningful volumes until the third week in May, with promotional volumes expected in early June. This means that South American importers have a chance for a significant recovery in mid to late April and if marketers can stretch out their supplies into May, then we could see the spot market reach the low 30s again.**

**Red Seedless**

**Red Seedless spot FOBs have not quite recovered like green, but we can still see a light at the end of the tunnel. Sonora, Mexico won't have any meaningful volumes of red seedless grapes until the last week in May, so any Chilean growers who can extend their season into that mid-May window could see significantly higher prices. Of all the Chilean red varieties that could possibly extend into May, Crimsons have proven to hold very well in long term storage. Their traditional high brix play an important role in storability. Currently, the spot market ranges from the high teens to the low 20s for Peruvian Sweet Celebrations, premium Peruvian Jack Salutes are fetching significantly higher prices in the wholesale markets. Good quality Chilean red grapes are trading a bit lower, but we should see prices for red grapes tick higher after the April 10th USDA marketing order. It would not be a surprise to see the spot market for Chilean red seedless top the low 30s, by the 10th of May.**

**Green Seedless**

**We have started to see the spot market for good quality green grapes spike higher over the past week and the industry can expect to see the typical jump in green seedless pricing in April. Chilean volumes of green are now past the peak we saw in March, and April volumes should decline week by week. Peruvian exports are almost finished, with only premium Autumn Crisp left in the market. Chilean volumes of Autumn Crisp will continue to jump each year, but right now they are serving only as a replacement to the traditional late**

**varieties pulled in their favor. Currently, the spot market ranges from the low to mid-20s XLG, mid to high 20s for Jumbo fruit, with pricing for Chilean fruit topping the low 30s by the third week of April. There are still deals being made on aging lots, but most of that fruit will no longer meet retail spec. Premium Peruvian Autumn Crisp are trading significantly higher, ranging from the mid-30s to the low 40s and will most likely top the 40s for the best fruit throughout the month of April.**

**Citrus**

**Rain events over the weekend put a damper on harvest for California citrus and coolers will be working off current inventory for at least the first few days. Weather is supposed to warm up and dry up towards mid-week. Navel size structure is currently 88/72/113 with a decent amount of 56s. Lemon prices and sizes have increased with minimal amounts of 140s and smaller coming out of the field. This is expected to continue through May. Larger Lemons starting to show pliability due to the increase in moisture from the rains. Cara Cara oranges will have hot deals for the rest of the season as supply still exceeds demand. Estimated end date is mid-May. Minneola's still peaking 125/100 with demand exceeding supply on 80s and larger. Grapefruit packing out heavy on fancy with good volume of small fruit, peaking in the 36/40 size spectrum.**

**Melons**

**Second cycle Guatemalan production has continued to bring good numbers of cantaloupes out west. We have a good mix of sizing - 9s/9Js and 12s out west, and should continue seeing solid production numbers over the next two months or so. The east coast continues to deal with vessel delays, that has kept their inventories limited. Markets have continued to settle though as Honduran shippers try to get through their inventories prior to more Guatemalan fruit arrives. Cantaloupe arrivals continue to show optimum quality characteristics, with very nice high color fruit. With increased supplies there should be a good percentage of all sizes to work with. Warmer weather trends are expected in northern states for at least the next week or so, which is causing retailers to look at larger promotions in the short term as they attempt to boost the melon category - which has been lagging after a couple months of record pricing.**