

# FRESH LINK MARKET REPORTS

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May 19th, 2025 Fresh-Link Fruit 559.306.6900 I [infoFLF@freshlk.com](mailto:infoFLF@freshlk.com)

## **Market Update for Table Grapes**

**Week of May 19 – May 25**

The table grape industry is gearing up for another transition to Mexican and domestic supplies, but retailers will likely have to use fruit from South America for another two weeks to keep shelves fully stocked. Quality and condition of remaining South American supplies are inconsistent, so retailers will look to move to Mexican and Coachella grapes sooner rather than later. It's been cool in Sonora, with daytime temperatures only in the low 80s but things do look to be heating up over the next 10 days. Until then, supplies will continue to just trickle across, leaving marketers short this week. This is nothing we haven't seen before. A typical slow start, keeping spot market FOBs elevated, while marketers struggle to fulfill cheaper programmed commitments. Importers with sizable inventories of Chilean grapes will need to keep spot market pricing reasonable, as they don't want to get stuck with fruit once the industry makes the full transition.

### **Red Seedless**

We won't see any meaningful volumes of Mexican red seedless for another 10 days to two weeks, importers with volumes of Chilean fruit will still have a chance to move through their remaining volumes before retailers completely pull the plug on South American grapes. The spot market for good quality imported red seedless ranges from the mid to high 20s, with size and variety being the determining factors. Wholesale markets are filled with average Chilean fruit, so we can expect demand for fresh Mexican red grapes to be very strong out of the gate. Many retailers are focusing on sourcing only propriety varieties but unfortunately, we won't see any meaningful volumes of Sweet Celebrations until the third week in June. Marketers won't be shy to ask 30 plus for Mexican Flames this week and next, but the spot market should take a significant drop by the first full week in June.

### **Green Seedless**

here is still availability of South American Autumn Crisp and other green seedless, but many retailers have already made the move to Mexico. The challenge is that there is just not enough Mexican fruit crossing each day to keep up with the demand. The spot market should remain very firm this week, with Mexican Early Sweets trading between the high 30s to low 40s. Chilean Autumn Crisp are selling in the high 40s plus, but quality is inconsistent. Good quality Peruvian and Brazilian Sugar Crisp also ranging from the high 30s to low 40s East Coast, but supplies are running low. With retail programmed pricing well below the spot market, Mexican growers will start diverting fruit to marketers not locked into lower prices to take advantage of the higher spot. It's just a matter of two weeks before we see significantly more fruit crossing and spot market pricing dropping more in line with pre-season programs.

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## **Citrus**

**Citrus growers are now facing significant labor challenges as workers begin to transition to cherry and stone fruit harvest. This is expected to continue until cherry season in California ends.**

**California Navel supply is shorter than expected for this time of the season, majority estimate is 15-20% less. Many growers are currently harvesting Valencia with a few holding out with Navels till the end of May, first week of June. Small Valencia's are expected to be the majority of this season's crop, however expected volume has still not been realized. D1 Lemons still available in volume on larger sizes with decent quality but showing pliability as season starts to come to a close. They are however more visually appealing than D2 Coastal Lemons.**