

FRESH LINK MARKET REPORTS

December 5th, 2024 Fresh-Link Fruit 559.306.6900 I infoFLF@freshlk.com

Market Update for Table Grapes

Week of December 2 – December 8

Demand for imported table grapes continues to rise, as retailers move away from California supplies. Quality on remaining California fruit is very hit or miss, but some retailers will try to hang on if they can, due to cost. We can expect most of the industry to make a full transition to South American imports over the next 10 days, but supplies entering the U.S. market will not be enough to meet the growing demand. The magic number is 3 million cartons to completely fill the pipeline and Peru only exported 2 million boxes last week. The Ica region of Peru is starting almost a month later than last season due to cool weather and a more normal pruning schedule, so we won't see peak volumes from Ica until the end of January. Expect to see a demand exceed supply situation through December and well into January, as we may not see imports top 3 million boxes until Chile can help fill the pipeline.

Red Seedless

California red seedless quality continues to be hit or miss, but many retailers will try to stay with domestic fruit due to the lower cost. Pricing for California fruit ranges from the mid to high 20s. If rejection rates continue to rise, retailers will have no choice but to transition fully to imports. Importers on the east coast have been receiving Peruvian Crimsons and Jack Salute and we will see some early Flames from Ica arriving over the next two weeks. The spot market is elevated for imports, ranging from the mid-20s for Crimsons and high 30s for premium jumbo Jack Salutes. Look for the spot market to hold firm at these levels well into January, as we won't see promotable volumes of imported red seedless until February.

Green Seedless

With California supplies all but finished, we have seen strong demand for imported green seedless. The spot markets for imports has jumped sharply over the past week, with many importers asking for the low 40s plus, for premium varieties. Volumes from both Brazil and Peru are not sufficient to meet the demand and we can expect this trend to continue well into January. Another challenge the industry will face, is low brix in the Peruvian fruit. Due to the extreme drought, many northern growers were forced to harvest green varieties early, leaving the sugar at less than desirable levels. Retailers will have to adjust their expectations regarding the eating experience until volumes from Ica, Peru hit the East Coast in January. Currently, the spot market ranges from the high 30s to the mid 40s depending on variety. Some importers are quoting even higher for the best Autumn Crisp.

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Citrus

With colder nights in California influencing more natural color, harvest is peaking in all citrus commodities. Navel pack outs peaking on fancy grade and are ready for holiday ad promotions as well as later in the year for school and retail business. Mandarins peaking on larger sizes, with medium and smaller fruit available as needed. Pummelos and Grapefruit continue to harvest with a range of sizes available. Lemons starting to show some size with a few growers peaking on the upper end of the size spectrum while the majority peak on the small side.

Melons

All domestic melons are done for the year. Off-shore loupes have hit the east coast, and the west coast supply will follow behind that in about 1-2 weeks. Early reports are showing good quality on these first melons coming from Guatemala. Prices are elevated with the very little low supply.

Watermelons have been crossing over in better numbers as southern Mexico has ramped up production. Early crossings have had some fair to good quality. Fruit is very expensive currently. Mini's have also been coming over in better numbers. Quality is also fair to good.