

FRESH LINK MARKET REPORTS

November 22nd, 2024 Fresh-Link Fruit 559.306.6900 I infoFLF@freshlk.com

Market Update for Table Grapes

Week of November 18 – November 24

The expected smooth transition to South American table grape supplies looks to be far from reality. California growers are running low on green seedless but will have ample red grapes, potentially through Christmas. Meanwhile, importers on the East Coast have begun receiving fruit from Peru and Brazil and will likely pair green seedless with their own red grape supplies to balance inventories and avoid stockpiling red grapes in cold storage. This leaves California growers in a precarious position, lacking both the bargaining power and quality to compete with fresher imports. With growing interest in imported fruit, the industry is expected to fully transition by mid-December, though many are ready to make the switch right after Thanksgiving.

Red Seedless

California growers have ample supplies of red seedless grapes and hope to retain their market share through Christmas, even as supplies from northern Peru begin arriving on the East Coast. However, interest in imported fruit remains low for now, as most retailers will continue sourcing California grapes until quality prompts a switch. Inventories of imported fruit are expected to build over the next two to three weeks, with importers likely leveraging their green seedless to keep red grapes moving. Currently, California red seedless is trading between the mid to high 20s, with deals available, while early imported Jack Salutes are trading between the mid to high 30s East Coast, though insufficient volumes prevent a competitive market from forming.

Green Seedless

Supplies of California green seedless grapes are rapidly dwindling, leaving marketers uncertain about fulfilling programs into December. Interest in imported green seedless is growing as California's quality and availability decline, reflecting a years-long trend of increasing consumer preference for green seedless. Currently, California Autumn Kings are priced between the high 20s to the low 30s, while Autumn Crisp range from the low to high 30s, though quality varies by grower. Imports are arriving slowly, with East Coast pricing for premium Autumn Crisp ranging from the mid-30s to the low 40s although quality on early Peruvian fruit may also be inconsistent due to severe drought conditions forcing earlier harvests with lower-than-ideal brix levels.

Citrus

California Navels peaking heavily in 113/138/88 with a decent amount of 72s. Many growers offering deals to clear out the smaller sized inventory. 56s and larger are still a

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very small percentage of pack outs and this trend looks to continue for the next few weeks, A few smaller growers starting to harvest Cara Cara oranges with the larger growers still opting for mid to late December. Domestic Mandarins are currently harvesting clementine variety with good volume available, there are still some imports available on the East Coast. Inventories are starting to build a little volume on D1 Lemons, still in the mid to small size range. Large Lemon availability very limited. Meyer Lemons are currently being harvested with availability limited to the Holidays. California and Texas Grapefruit in full swing with good availability in a range of sizes.

Melons

All domestic melons are done for the year. Off-shore loupes are set to hit the east coast in the coming days, 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.

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 at this time. Mini's have also been coming over in better numbers. Quality is also fair to good.