

FRESH LINK MARKET REPORTS

May 12th, 2025 Fresh-Link Fruit 559.306.6900 I infoFLF@freshlk.com

Market Update for Table Grapes

Week of May 12 – May 18

The South American table grape season is coming to a close, with exports from Chile in week 18 dropping well below 100,000 cartons. U.S. importers still have reasonable supplies, ensuring a smooth transition to the Mexican season. Growers in Sonora, Mexico, will begin harvesting green seedless grapes next week, followed by red seedless the week after. FOB pricing for imports and Mexican grapes will be elevated, but a steady decline in pricing is expected over the next two to three weeks, once Mexico starts hitting their stride. Mexico is projecting a crop exceeding 20 million cartons, and some overlap with California supplies is expected in July, especially with Mexico's newer proprietary varieties coming in very late June. Retailers can begin planning table grape promotions by the first week in June and continue all the way through July.

Red Seedless

Late-season Chilean Crimsons continue to arrive with very good quality and condition. Importers are storing their best lots to carry the season into late May. Early Flames from Mexico will begin harvest around May 20, with volume picking up at the end of the month. Retailers should be able to start promoting Mexican red seedless by the second week of June, as FOBs are likely to range between the low to mid-20s by the 15th. California Arvin Flames will begin harvest just after the Fourth of July, overlapping with proprietary varieties from Mexico like Sweet Celebration, so retailers will have lots of choices to keep promoting red grapes in July. The current spot market for imported red grapes ranges from the mid to high 20 FOB New Jersey, depending on size and variety. Look for Mexico to open early Flame pricing between the low to mid-30s.

Green Seedless

Quality and condition on remaining South American supplies are inconsistent, with many importers still repacking weaker lots. The very best Chilean grapes are selling between the low to mid-40s, but there is limited availability of true premium fruit from Chile. Mexican green seedless supplies from Sonora are just starting this week, with FOB pricing ranging between the mid to high 40s. Better volumes of Early Sweets from Sonora are expected around May 15th, and we should start to see promotable volumes and pricing by the first full week in June. Pricing on Mexican green seedless will drop quickly, with FOBs expected to be in the mid to high 20s by June 10th. Once the volumes come, it will take strong retail promotions to keep the market stable.

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Citrus

California Navel oranges continue to be very tight on 113/138s. Most growers still estimating to end Navel season approximately end of May to mid-June. Valencia oranges are currently being harvested, however expected volume on small sizes has not yet been realized. D1 Lemons showing pliability as season starts to come to a close, however more visually appealing than D2 Coastal Lemons.