

# Ledyard Produce Report

## ICEBERG LETTUCE

The Salinas Valley will continue to harvest lettuce through the week of Oct. 13. The recent light rain and continuing string of warm days have increased near-term availability. Shippers expect adequate supplies through Oct. 18. Salinas growers continue to struggle with mildew and overall light weights.

The first Huron supplies will be available as early as Oct. 15, and all Huron shippers will be harvesting during the week of Oct. 20. Many of the first fields in Huron will unfortunately offer light production. Early field reports suggest that poor stands will result in an initial production drop of 15-20 percent. The brief Huron season will continue into mid-November.

Central Valley water restrictions are forcing more and more shippers to bypass Huron and move directly from Salinas to the desert in mid-November. This is risky due to fewer heat units in the Salinas Valley and the possibility of a cool and wet autumn. The desert season will begin in mid-November, and all shippers will be harvesting by Thanksgiving.

Processors continue to purchase extra supplies on the open market, and every indication suggests that this trend will continue into mid/late October. The degree to which they buy on the open market will dictate the strength of the lettuce market. The balance between supply and demand remains delicate, and prices will quickly advance if processors find the need to buy significant volume on the open market.

## LEAF LETTUCE

The recent light rain and continuing string of warm days have increased near-term availability. Short-term supplies are expected to be adequate through Oct. 18, then tighten beginning the week of Oct. 20. Some shippers will offer leaf supplies in Huron, while the majority will continue to harvest in Salinas until the desert season begins in mid/late November.

## BROCCOLI

Central Coast shippers say that production will remain fairly normal through Oct. 17, then tighten noticeably the week of Oct. 20. Salinas supplies will end and desert production will start in mid-November. California's brief autumn broccoli deal will begin the week of Nov. 10. Short-term prices will hold fairly steady through the week of Oct. 13.

## CELERY

The Michigan celery season is over. California shippers are seeing a significant increase in sales to Canadian and eastern U.S. customers who have relied on Michigan product during the summer months.

Stronger demand for California celery pushed prices moderately higher in early October. The availability of 24s and 18s is expected to tighten heading into mid-October. Looking down range, Oxnard will offer new-crop supplies in late October or early November. Salinas production will continue well into November and meet much of the Thanksgiving demand.

## STRAWBERRIES

The Oct. 4 rain in the Salinas Valley was minimal and caused very little damage. Driscoll said that volume in Salinas, Watsonville and Santa Maria remained above normal in early October. Fruit from the north has good size but is dark in color, and some of the fruit is over mature. Production is expected to ease considerably the week of Oct. 13 and force overall prices higher.

Oxnard production continues to climb and will peak in mid- to late October. Oxnard fruit is strong and offers good shelf life after arrival. Looking down range, supplies from Mexico will start the first week of November.

## ONIONS

A strong sense of urgency and concern is building within the Northwest onion community because the combination of a late harvest and pending cold weather could turn an already light crop into a very short crop and force a dramatic market increase, which could last the entire shipping season.

Ontario, OR, growers are considerably behind their harvesting schedule, which could hurt the size of the crop eventually put in storage. Historically speaking, growers should have 90-95 percent of the crop harvested by now and have the entire crop in storage by Oct. 10. In reality, only 50-75 percent of the crop is harvested to date. Shippers that are 75 percent finished still have another 10 days of harvesting before their crop is completely put in storage.

The Oct. 9-15 weather forecast in Ontario, OR, calls for overnight lows between 31 and 36 degrees. The coldest stretch will occur Oct. 11-13 with overnight temperatures of 31 and 32 degrees. Daytime highs will only reach the mid-50s Oct. 9-12. The forecast in Utah calls for 0.33 inches of rain Oct. 11 and 0.25 inches to one inch of snow Oct. 12. Daytime highs will only reach into the 40s Oct. 11, 12 and 13 with overnight lows in the upper 20s Oct. 12, 13 and 14.

## RUSSETS

With 5-10 percent of the entire Idaho crop still in the ground, pending cold weather in eastern Idaho could change the dynamics of the 2008-09 crop. It's important to remember that Idaho grows and stores 40 percent of the nation's storage russets and that what happens in Idaho will influence the market in all russet shipping districts.

The Rexburg, ID, forecast calls for overnight lows of 22-29 degrees Oct. 10- 17. The coldest stretch will be Oct. 11-15 with overnight lows 22-25 degrees. About 0.25 inches to one inch of snow is expected daily Oct. 10-12.

The Norkotah harvest is basically over, and the crop will offer high quality with sizing slightly above average. Prior to the threat of cold weather, growers felt that the Burbank crop, which is 90-95 percent harvested, would also offer strong quality but that sizing would be slightly below normal. The pending cold weather could reduce the availability of Burbanks to the fresh market by 5-10 percent. If the cold hits, the damaged Burbanks would be diverted from the fresh market to processors and dehydrators.

## LEMONS

Shippers are seeing unusually light demand. The upcoming desert crop is projected to be 127 percent larger than last year. Sunkist will have a 70 percent market share and expects to ship between 8.2 million and 8.9 million cartons during the desert season. Four shippers have started, and their fruit is available for loading in Coachella, Yuma and Oxnard (via transfer trucks). The Oxnard crop is 94 percent harvested and the desert is 5 percent harvested.

Mexican imports total 495,000 cartons to date, which is 55 percent lighter than one year ago. Current supplies are medium and large in size, and 80 percent of the fruit is choice grade or lower.

## ORANGES

Light demand continues to overshadow the limited availability of 138s and 113s. This is giving the illusion that the availability of small sizes has improved. In reality, the availability of 138s remains snug, and any renewed demand would once again create a demand-exceeds market in the small orange market. It is late in the Valencia season, and fruit hanging on the trees continue to gain size. In terms of the remaining Valencia crop, the percentage of small sizes will decrease further throughout October.

The upcoming Navel crop is expected to be 38 percent lighter than last year and the lightest crop since 2001-02. Sizing will be heaviest to 72s, 88s and 56s. Maturity and color appear to be two weeks later than last year, resulting in a start date near the end of October or early November.

## HASS AVOCADOS

The California Hass season is essentially complete, and new-crop supplies will return in January.

Chilean supplies are late and light due to last year's freeze and excessive rain earlier this season. The first vessels arrived Oct. 1, which is one month later than usual. Initial volume is strong, and additional Chilean vessels will arrive on the West Coast every two weeks throughout the winter.

Mexico has a large crop, which nicely filled the September void created by Chile. Mexican supplies of 40s, 48s and 60s are readily available. Today's Mexican avocados crossing into the United States are early-season fruit and will take time to ripen after arrival.

Chile is contributing 5 million pounds per week to the U.S. market, while Mexico will consistently supply 14 million to 15 million pounds. The market recently eased and is expected to hold steady at today's new levels heading into the second half of October.

## MELONS

The west side melon deal is winding down, and most cantaloupe shippers will conclude their season sometime the week of Oct. 13. A good range of sizing is available, but all cantaloupes have a distinct green cast. The desert fall cantaloupe deal is underway in Blythe. Brix levels are above 10, and shippers are offering 9s through 18s. The autumn melon season will continue in the desert through October.

Honeydew supplies are growing scarce among west side shippers. What few supplies remain tend to be 9s with just handfuls of 8s and 6s. Prices are firm and expensive. The autumn honeydew season will start in the desert the week of Oct. 13. Generally speaking, west side melon supplies are falling into the hands of fewer suppliers.

Recent daytime highs in Mendota have been in the mid-80s. Temperatures will cool into the low 70s Oct. 10-12, then rise into the low to mid-80s Oct. 13-17. Skies will remain clear, and there is no threat of rain through Oct. 17.

## GRAPES

The harvest is either over or nearing the end on most varieties. Shippers are offering excellent quality with nice berry sizing, high color and long shelf life after arrival. Shippers will continue to harvest late-season varieties through much of October. Thompsons, Princess, Ruby Reds, Red Crimsons and Red Globes are just some of the available varieties. The overall market is steady at current levels. There is a multi-tiered market within each variety based on berry sizing.