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Retail Market Report

April 30th, 2019

Organic Tomatoes

Organic Roma Tomatoes Supplies will remain non-existent for the balance of this week. The market has dramatically elevated as demand exceeds available supplies. New crop is scheduled to start in another 10-14 days.

Organic Heirloom Tomatoes Supplies will remain steady for the balance of April. Promotional opportunities are readily available.

Organic Vine Ripe Tomatoes Supplies remain limited. New crop set to begin the middle of next week.

Avocados

California/Mexico Expect elevated pricing through June, when volume typically rises. Mexico's winter season is nearly over, and stocks are limited. New California crop supplies are enough. Excellent quality reported; oil content is highest in Mexican fruit.

Tomatoes

Florida Spring Tomato harvest continues out of Florida. Quality is excellent, and pricing is conducive for running promotions. However, Florida is forecasted to receive 5 days of rain this week, which could curtail harvest and have adverse effects on quality.

Mexico Sinaloa and Culiacan are finishing up round and roma tomato harvest for the year. Sonora, Obregon and Jalisco are ramping up. Roma tomato production has also started in Baja, California and rounds should follow shortly thereafter. Supplies are expected to be ample going into the Cinco de Mayo holiday.

California Indio, California is set to kick off early California tomato production by the week of May 15th.

Heirloom Tomatoes Supplies out of Baja and Central Mexico are down dramatically and will be in gap transition until May.

Outlook The 4 tomato suspension agreement is set to expire next Monday (after 23 years), there is anticipation and uncertainty as to how this will impact tomato supplies and pricing from Mexico moving forward.

Suspension Agreement

Tomatoes The U.S. Department of Commerce is slated to drop the Tomato Suspension Agreements and its minimum price provision, replacing it with a 17% duty on all tomatoes imported from Mexico. Experts predict this will result in fewer tomatoes on the market and increased pricing. Organic tomatoes could be hit particularly hard, as even a small fluctuation in supply could greatly alter the demand impact.



Berries

Blueberries Supplies are increasing with good quality fruit coming out of Central Mexico, Florida and Georgia. The market is easing off and trending lower as these regions compete for the market share. Promotional opportunities available in the next few weeks leading up to Mother's Day.

Strawberries The market is steady with growers shipping from multiple locations including Oxnard, Santa Maria, Salinas and Watsonville. Shippers were hard pressed at the start of the week to apply limited labor resources to maintain maximum production and have product available for Easter demand. The market should ease going into Easter weekend. Good quality reported out of all districts with the occasional overripe and bruising on berries out of Oxnard. Promotional opportunities available for the next three weeks and beyond.

Onions

Mexico/California The market on yellow onions from the Northwest are steady with some load volume deals available as suppliers look to clean out storage prior to the season ending. Good quality reported with partial translucency and light sprouting. The market is steady against red and white onions though volume will be limited for the remainder of the season. Texas is in full swing production on all color varieties. California will begin harvesting the end of this week. Supplies will be limited going into May.

Citrus

Limes Supplies are expected to improve this week. Harvest crews are back in picking and we are expecting increased volume on inbound trucks. The market is expected to remain strong in the low \$40s. Suppliers are still holding off on taking on open market orders. The Cinco de Mayo pull is upon us and we will need to take it week by week to see if the market will eventually soften.

Lemons Most of the volume is currently available out of the Central Valley with momentum picking up out of the coastal regions. Sizes are peaking on larger fruit; 165s and smaller will remain limited through June. The warmer weather has brought on excellent color and juice content.

Cucumbers

Florida/Mexico Eastern supplies are strong with harvesting out of Plant City and South Florida. Quality is best in Plant City, though good out of all areas. Georgia is expected to start in a light way over the next 7-14 days. Plentiful supplies available from Sonora and Baja is generating excellent quality.



Bell Peppers

Eastern Supply Florida's supply is steady this week South Florida growers are starting to wind down, leaving Plant City as the primary growing region until Georgia starts in mid-May. Plant City will have excellent quality and solid volume this week but is not a major growing area and acreage is limited. Harvest is expected to continue for another few weeks, though supplies might become tight when South Florida is out of the picture. Quality out of this region is fair since the fields are older and tired.

Western Supply Western markets are looking to Nogales and the California desert for supplies this week, although there are few growers with new blocks, and production out of Mexico is nearing the end of the season. Quality has been good the last couple of weeks but will start to decline as more growers finish with the older fields. Coachella's new crop is generating excellent quality, though volume is light.