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Retail Market Report

September 5th, 2019

Tomato Update

Southeastern Tomato Supplies Tennessee and North Carolina are both currently in tomato production. Virginia will come back on towards the end of September. However, wet weather continues to plague the entire East Coast. Supplies are barely adequate, and pricing continues to run in the high teens to low twenties. As we progress further into September, you might begin to see quality issues associated with the wet weather.

California Western tomato growers are on the downhill side of summer tomato volume. Barring any wet weather, growers should make it until the end of October/early November before closing out the summer season. Markets are in the high teens for the best quality. Excessive heat has showed up in the quality including reduced shelf life in some growing areas.

Heirloom Tomatoes Supplies are steady out of both California and Mexico. Promotional opportunities available for the month of September.

Grape & Cherry Tomatoes The market has slightly improved, though supplies remain limited. It will still be another couple of weeks before harvests are expected to improve. Mexico will begin harvesting in greater volume mid to late September.

Weather Outlook

East Coast An active tropical season persists with all eyes on Hurricane Dorian along the East Coast, potentially making landfall in the Carolinas going into the weekend.

Mexico/California Another tropical storm developing in the Gulf of Mexico and Hurricane Juliette off the Baja Coast. Out West a weakening high-pressure system will bring a gradual cooling across California and increasing marine layer influence into next week. Scattered showers and thunderstorms will continue across Central Mexico becoming isolated to the north with seasonably warm temperatures expected.

Organic Tomatoes

Organic Heirloom Tomatoes

Supplies remain steady out of California and Mexico. Due to excessive heat, there are some quality concerns against California heirloom tomatoes.

Organic Cherry Tomatoes Volume has declined in California with the transitioning into new crops. Overall volume will be reduced for the summer due to less acreage planted. Weather related issues have delayed new crops out of Baja.

Organic Vine Ripe Tomatoes New plantings have started out of Baja and supplies are gradually improving. Anticipating reduced volume overall this Summer/Fall season.

Organic Roma Tomatoes Supplies are gradually improving out of Baja. The market looks to remain strong throughout the week.





Avocados

California The California crop is finishing the season strong. Late season fruit that remains available in the market is moving and holding at a premium. Avocado trees go through an “Alternate Bearing Cycle”, meaning they produce a heavy amount of fruit one year and generate less the following year. The 2019 season was an off year and anticipating a much larger crop in 2020.

Mexico Harvest volumes have ramped up over the past two weeks and with all three origins still in the pipeline, there are high inventories in the U.S. this week. However, we are entering a lower demand period and anticipate market conditions to remain stable and trend lower into the Fall season. Mild to intense rains are projected throughout the Summer for the growing region of Michoacán, Mexico. Fruit has been sizing up on the trees due to the steady rains each week. This has caused the size curve to shift to 48s and larger. Expect a tight market for the next couple of weeks.

Melons

Cantaloupe Increased retail demand approaching the holiday weekend helped stabilize and elevated cantaloupe market at the end of last week. There has been a drastic shift in daily pack-outs to large fruit (9s), leaving 12s in a limited position and small fruit (15/18s) being extremely short. Quality remains at optimum levels.

Honeydew Production has dropped of the past few days as new fields are late in starting harvest. Anticipate limited production, consisting mostly of 5/6s or the next week. Good quality reported with brix levels in the 12-14% range.

Watermelon California fruit quality is excellent along with flavor. Sizing has leaned to the larger side of the scale with limited amount of smaller fruit available.

Berries

Strawberries Supplies remain limited coming out of the Salinas, Watsonville, Santa Maria and Lompoc growing areas. Quality is fair with some fruit coming out of the south which is slightly better than in recent weeks. We continue to see excessive bruising with reduced shelf life in all growing regions. The market is expected to remain firm as shippers are experiencing strong demand with schools back in attendance.

Blueberries Supplies are winding down out of the Pacific North West with Oregon and Washington finishing production. Michigan will continue to produce their later varieties well into the month of October. Mexico is beginning to cross increased numbers through McAllen, Texas. Offshore imports from Argentina and Peru have started to arrive and increase in the following weeks. The market will vary depending on growing regions according to quality and age of crop. Michigan, Mexico and import blueberries are commanding a premium due to superior quality.

Citrus

Lemons Supplies have remained steady for most of summer but more recently there has been a shift in supplies on 140s and larger. Harvest is starting to wind down out of Southern California with the California desert and Arizona regions expected to start by mid-September. Import lemons are available to provide relief from domestic supplies.

Limes Markets are rising quickly as supplies continue to get tighter each week. With drought conditions in the growing regions, the industry is receiving light pack outs and minimal crossings. The outlook moving forward is dependent on the weather in Mexico and without any rain we won't see improvement for another 4-6 weeks. Even if conditions do improve, there has already been severe bloom drop over the last several weeks and the new bloom set will take approximately 100 days to harvest. The market is expected to remain extremely active through the end of this year.

Onions

Northwest Onions are in good supply out of Idaho, Oregon and Washington revealing excellent quality. Super colossal and colossal yellow onions are tightest in supply but starting to improve as we move into September. New Mexico has some supplies remaining of red and yellow onions with one supplier looking to move product out in order to finish up for the season. Good supplies and quality expected for the entire month of September.