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Retail Market Report

November 13th, 2019

Weather Outlook

California A series of cold fronts bring cooler temperatures and a return of the marine layer to much of California into next week. Warm and dry conditions across the Southwestern desert regions with strong gusty winds expected early next week due to a passing cold front.

Mexico The Northeastern region of Mexico will see cold temperatures with a chance of rain, which will negatively impact the remaining crops. This region of Mexico, including production areas of La Laguna Torreon, Durango and San Luis Potosi will all see minimum temps in the lower 40s. These locations have essentially finished shipping for the season with only a handful of growers still sending small quantities of tomatoes into McAllen, Texas, however the cold weather will slow production down even further.

Florida/Georgia Freezing temperatures tonight and Thursday in Southern Georgia and Northern Florida growing regions should bring an end to any production still coming from these areas. Expect minimum temperatures in the region to be in the low 30s. Temperatures on Thursday will rise back into the 40s where they will remain going into next week, though by then the damage will be done. Green Beans, Bell Peppers, Eggplant, squash and tomatoes are still being harvested in these areas.



Tomato Update

California Central California tomato harvest has finished for the 2019 season. Oceanside Pole will finish the week after next.

Baja California New crop round and roma tomatoes are available in adequate quantities. Demand is fair and markets are in the high teens to low twenties for best quality.

Central Mexico Only one shipper is sending round and roma tomatoes up through Nogales. Several more shippers are expected to start sending roma tomatoes through Nogales over the next couple of weeks. There will be no significant volume available until late December or early January. Markets are in the mid to high teens for best quality.

Heirloom Tomatoes Production continues out of California and Mexico. With the shorter days, harvest volume has slightly decreased. The market remains steady.

Grape Tomatoes With Ruskin/Palmetto and South Florida both in production, along with warm weather bringing on crops, Florida's tomato supply is strong this week. Volume is steady out of Baja and Central Mexico. Additional growers will start production over the next few weeks.

Outlook Mexico is experiencing some light rain showers in the tomato growing regions this week. Not a significant amount of rainfall, though a reminder that both Florida and Mexico are in the vulnerable timeframe where overly wet or freezing weather could change the fresh tomato supply picture rapidly.

Citrus

Navel Oranges We are currently packing multiple days per week and will continue to build volume throughout the month of November. Sizing will peak on 88/113/72ct. We also have some volume available on 56/48ct. Promotional volumes will be available on bulk and bags from November through May.

Lemons California production has started out of Coachella and Imperial Valley. Imports out of Chile will begin to wind down as well as Mexico through the remainder of November. Our growers will start out of the Central Valley this week with limited availability and volume will increase throughout the month of November.

Limes The market has decreased due to excess rain in the Mexican growing regions. There will be a shift in the crops size distribution towards mid/large sized fruit due to the rain. Smaller limes have become scarce as many growers have not been able to harvest. The market will remain firm until crossings normalize, though projections in Mexico indicate there will likely be no relief until January.

Grapefruit California production has finished, and many customers will transition to Texas immediately. Our next California crop will begin mid-February.

Cara Cara New California crop out of the Central Valley will be a good specialty variety to promote. The season is projected to run from December through May, and we will have approximately 335k cartons available. This will be a good promotional item to load along with navels.

Onions

Midwest Idaho, Oregon, Washington, Utah, and Colorado continue to generate good supplies of yellow, red, and white onions. Holiday demand is in full swing for Thanksgiving and suppliers are not missing a beat. Expect the market to remain the same as we head into the second half of November.

Avocados

Mexico Harvest remains strong out of Mexico with the size curve improving. Even though we are entering the slowest demand period of the year for avocados, retail activity remains strong which has generated a stable market. We expect the consistency to persist for the coming weeks and there should be confidence in continuing to promote avocados through the holidays. With the abundance of Mexican fruit in the pipeline, there is little to no demand for Chilean fruit.



Berries

Strawberries The market is elevated this week. Strawberry production is continuing to exceed expectations, as the berry growing regions of California have yet to receive a major rainstorm this fall. Suppliers are reporting that as labor shortages throughout the state continue and growers are at crossroads between having crews continuing to pick fruit or planting new fields for the next season. Good overall quality and condition as the region has been experiencing cool nights, which bolsters solidity and plant health. California's prolonged season has filled a gap in supply as crossings from Mexico remain slow to come and rain in the region continues to hamper production.

Blueberries Import blueberries from Peru, Argentina, and Uruguay are arriving by vessel on both the West and East coasts. Mexico is also generating good volume arriving through Texas and Arizona. The market will remain steady with lower undertones moving into the weekend. Excellent quality reported out of all regions.

Bell Peppers

Green Bells The market is steady, and stocks are ample. California's San Joaquin Valley has finished for the season, while Coachella and the California desert season is underway. Production is also just getting started out of Mexico. East Coast growers in Georgia are winding down for the season and will be transition to Florida.

Red/Yellow Bells Prices are expected to remain elevated through the remainder of this month due to reduced volume. California growers will move production from Hollister to Coachella next week. The Mexican season is projected to start in early December. East Coast growers will transition from Georgia to Florida as well.