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# Retail Market Report

December 5<sup>th</sup>, 2019

## Tomato Update

**Mexico** Last week, the Mexican tomato growing areas were hit with 8-10" of rain over a 24-hour period. There was immense flooding that caused significant damage to crop and infrastructures. What would have been a December start of tomato harvest from these areas will now most likely be sometime in January. After the region can begin its initial harvest, a determination can be made as to what percentage of crops were lost and how overall quality may have been impacted. Expect the market to remain in the mid to high twenties for the next 4-5 weeks on drastically reduced supplies.

**Florida** Several factors are impacting a rapid decrease in tomato supplies out of Florida. One factor is there are close to 35% of tomato growers left in Florida farming tomatoes of the original and much larger group. Secondly, the extreme cold weather in the U.S. northeast has brought temperatures in the tomato growing areas of Florida into the low 40s. With Mexico being in the current tomato supply situation, all receivers have turned their focus to Florida just as they are seeing tomato harvest volume plummet. Markets will remain in the mid to high twenties unless additional bad weather further reduces supplies.

**Grape Tomatoes** Supplies will be extremely tight for the next few weeks until weather improves, and availability increases in the west.

**Heirloom Tomatoes** Production is down due to cooler days and evenings which has elevated the market. The California season has finished and will be transitioning to Mexico.

**Outlook** Unpredictable weather in November, December and January can impact fresh tomato supplies, quality and the market rather quickly. There are still another two months left until we are out of this volatile weather timeframe.

## Weather Outlook

**California** The last in a series of strong storms will roll into California on Friday going into the weekend. This will be followed by dry conditions and a warming trend expected through next week. The southwestern desert regions will see near to seasonal temperatures along with breezy conditions into next week.

**Mexico** Seasonal to slightly below normal temperatures forecasted going into the weekend.

**Florida** Dry conditions and cooler temperatures this week with a gradual warming forecasted for next week.





## Berries

**Blueberries** Supplies remain steady with fruit available in California, Texas, Florida, and Pennsylvania. All fruit is import at this point with Peru, Argentina, Uruguay coming via ocean containers and Mexico crossing into the U.S. through Texas and Arizona. Promotable volume is readily available for this item.

**Strawberries** Demand exceeds supply. The California growing regions in Salinas, Watsonville, Santa Maria, and Oxnard have received continuous rain since last Tuesday. Sporadic rainfall is forecasted going into the weekend. With these areas generating the largest amount of domestic supplies it has severely impacted availability. Production in Florida is just getting started and most shippers are picking on a few pallets 3-4 days per week, so volume is limited. Mexico production is underway but still struggling with smaller sizing and quality issues from rainfall and humidity during the past several weeks. The crops in Mexico are 2-4 weeks behind normal production schedules due to rain and expected to catch up after the first of the year. Virtually all shippers are quoting sold out and having issues cover contracts and program business in all areas.

## Onions

**Midwest** The market is holding steady across the board as supplies and quality remain excellent. Over the next couple of weeks, medium sized onions will tighten up due to an increase in retail demand for the upcoming Christmas and New Year holidays. Other sizes for yellow, red, and white onions will remain stable. Good availability out of Idaho, Oregon, Washington, Utah, and Colorado as we are in a peak storage supplies across the board.

## Citrus

**Navel Oranges** We are currently packing multiple days per week with volumes peaking on 72/88/56/48ct. We now have large sizes available for the remainder of the season.

**Lemons** California production has started out of both District 3 (Coachella/Imperial) and District 1 (Central Valley). Imports out of Chile will cleanup throughout December. Our growers are just getting started out of the Central Valley and volume will increase throughout this month.

**Grapefruit** Our next California crop will begin by mid-February.

**Minneola** New California crop in the Central Valley will start in mid-January and run through March.

**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.

**Limes** Rain in the growing regions has caused harvest delays and increase to pricing. Occasional quality issues reported include occasional styler and scarring.

## Avocados

**Mexico** Forecasts this week in Michoacán call for no rain. Growers are reporting some lenticel spotting on fruit due to the heavy rains in the previous weeks. Lenticel spotting is only cosmetic and dissolves as the fruit ripens. The market on large fruit (48s and larger) continues to strengthen and pricing elevate. Avocados trees continue to generate an excess of smaller fruit. Once the market stabilized, look for promotable volumes and pricing for Super Bowl demand.

## Bell Peppers

**Yellow/Red Bells** Prices are high, and supplies are expected to remain limited for the next two weeks. Rain is affecting volume in the Coachella Valley. The Mexican season has been delayed due to recent storms. Quality is average though color is consistent and flavor subtly sweet.

**Green Bells** The market is poised to climb. Supplies are tightening as rain is affecting harvests in California's Coachella Valley and Mexico. Good quality reported for both growing regions. East Coast production has transitioned to South Florida with some early harvest challenges on quality. The heat last week in Florida has affected fruit sizing.