



RETAIL MARKET REPORT

A Weekly Newsletter by Veg-Fresh Farms



TOMATOES

Outlook

Prepare for elevated tomato pricing for the next 2 and possibly 3 months. This is always the hardest three months of every year for tomato supplies. The next area with good volume will be Central Florida at the end of November. Keep in mind, we have more than likely not seen the end of adverse weather yet for the balance of this Fall/Winter.

Southeast Tomatoes

North Carolina is virtually the last area running any amount of tomatoes, though the volume is insignificant. Virginia, Michigan, Ohio and Alabama have all had nighttime and morning temps in the 30s which has all but finished whatever tomatoes were left to be harvested. The Quincy area of Florida (which was impacted by devastating rains from Hurricane Sally this month) will start next week, but the harvest will be nowhere near normal and will finish not much longer after it gets started.

Grape, Cherry, Medley Tomatoes

Grape and Cherry Tomatoes: Demand exceeds supply. Volume is down in Baja and Florida, but steady in Central Mexico. This decreased volume is creating the increased demand and pushing prices up a few dollars a box. Medley tomatoes are in overall great supply and steady volume.

California Tomatoes

The summer heat has taken its toll on what is left of the 2020 tomato crop. Supplies are insufficient to support demand. Shippers will remain sold out through the end of October when they finish four weeks earlier than normal.

Mexico

Central Mexico tomato supplies kick off the first week of January. Baja California will have limited supplies of roma and vine ripe tomatoes from the end of October and into December.

Organic Romas

Market is up and we have limited availability on Org. Romas. We will continue to have limited availability for another 2-3 weeks. Hopefully we will have new production starting up in October.

Conventional Romas

California will continue to harvest roma tomatoes, albeit in less volume over the next 6-8 weeks. Baja California will begin receiving their first winter roma tomato supplies in late October. With round tomatoes in short supply and through the roof, look for romas to not be too far behind.

Organic Beefsteaks

Market is strong.

Conventional Beefsteaks

Organic vine ripers have started up a little bit ahead of schedule. Look for volume to increase in October.

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Conventional TOVs

Good supplies out of Mexico. US supplies are limited depending on shippers. Canada will start to wind down and should be done with production soon. Market is currently weak, but may go up in the next week or two with availability out of Canada finishing up.

Organic TOVs

Supplies are light and cost remains on the higher side. Not anticipating production increases, so we expect the market to stay at current levels. We have good supplies, but movement has been very active.

Conventional Heirlooms

Volumes are down against summer plantings out of California and Baja; supplies will remain limited for the next two weeks. After that, fall plantings will begin. Markets are currently up.

Organic Heirlooms

Supplies continue out of Baja and California. Supplies are steady out of all regions, and markets are elevated.



ORGANIC MELONS

We continue with extremely light volume as the result of all the past weather events, along with current cooler weather slowing maturity. This week will be very light, but we will finally break into our new growing area on Monday of next week on all melons. We will be light going forward on honeydews for the rest of the season but will pick up on organic cantaloupe and organic mini watermelon as long as we are not hit with disease in the fields. The entire industry is suffering from a virus caused by the weather anomalies and smoke, which is why both organic and conventional melons are so tight. Our fields so far look unaffected but we are watching them closely. We will be pricing day to day going forward until we see more volume.



Organic Navels

Next crop will be California early November.

Organic Valencias

California Valencia is in fair supply. Sizing is peaking on 113/88/138ct which is perfect for bags. Industry is limited on 72/56ct throughout September and into October.

Organic Grapefruit

California Marsh Ruby Grapefruit is finished and we are in a gap before new crop Rio Red starts in early to mid-October.

Organic Lemons

The summer Mexico crop is now in peak volumes. Industry wide volumes are beginning to improve as well as sizing. Large fancy fruit (75/95ct) will be most limited throughout most of September; mid to smaller sizes will be more readily available (115/140/165/200ct). New crop California has started in light volumes and will continue to build into October/November.

Organic Minneola

Next crop will be California mid December 2020.

ORGANIC HARD SQUASH

California and Oregon going on all organic squashes. Weather conditions and smoke have caused delays and damage to organic squash. Some varieties are more impacted than others. Limited supplies on red kuri, kabocha, and honeynut.

ORGANIC STONE FRUIT

Washington is finishing up on organic stone fruit for the season. Red and black plums, and yellow peaches are still available out of California.

Conventional Navels

Import season is in full swing, and volumes will continue to build over the next few weeks. California new crop will start mid to late October.

Conventional Valencias

California has fair supply during the month of September. The market is limited due to lack of harvest crews, heat in the growing area, and increased demand. Sizing is peaking on 113/88/138ct which fits most juice or bag programs. We are limited on larger sizes: 72/56/48ct.

Conventional Grapefruit

California grapefruit is winding down quickly over the next 1-2 weeks. This will create a shortage and most likely a gap between California and Texas new crop.

Conventional Lemons

Import volume continues to build out of Mexico and Chile throughout the month of September, and will then slow down, transitioning back into California new crop in September and October.

Conventional Limes

Supply has improved and the market is getting better.

PINEAPPLES

Organic volumes have picked up and will continue to improve in October. Seeing less volume on conventional pineapple from Costa Rica, and this lower volume will stay low for another 3-4 weeks. Markets are decent.

RUSSET POTATOES

The volume on the Norkotahs are rising, and quality has improved. Prices have substantially decreased from the previous week. Moisture is still present on the crop but will diminish as they go through the sweat process. Burbanks are set to go into production between late September to early October.



BERRIES

Strawberries

The strawberry market has tightened significantly over the past week with demand now strongly exceeding supply. Production is down in both Salinas and Santa Maria. The new crop in Santa Maria is still tracking behind original estimates. It appears to be a combination of weather and after effects of the smoky air and ash from the recent fires. The gap in Salinas is also attributed to weather and the stress that plants are under after multiple high temperature events. We typically see a decline in production from that region during this fall window anyways, but it seems to be a sharper decline than normal. The volume in Santa Maria will ramp up and Oxnard won't be too far behind, so there should still be plenty of promotional opportunities for mid to late October, perhaps at slightly better pricing than we originally thought as an industry. As always, reach out to the berry team via email: berries@vegfresh.com.

Blueberries

Peruvian fruit is available at higher prices. Demand is weak for domestic and Canadian fruit; quality an issue. Fresh pick is done.

ONIONS

California: Winding down on yellow onions but still have red, white and sweet onions into October. Idaho, Washington, Oregon: Going strong on yellow onions and red onions. White onion volumes coming around as well.

MANGO

Decent volume from Mexico. All Size 6-12s. Keitt varieties.

CHILES

Chilies are steady out of Baja and Northern California.

BRUSSELS, BEANS & SNAP PEAS

Organic Brussels

A new series of fields have been delayed and will not start until another two weeks. We are still struggling with quality. Especially with this new series of heat waves, expect quality to get worse. It should get better in 2 weeks.

Conventional Brussels

Machine harvest started earlier than expected; we have good volume.

Organic Green Beans

Most of the volume coming in is from Baja, Mexico. Baja is experiencing heat and wind which is causing quality issues. We anticipate this to last for two more weeks until we get into new fields. We are now pulling from Baja, as we are seeing poor quality out of California.

Organic Snap Peas

We are year-round in Baja. Quality is bad due to recent heat waves.

ORGANIC APPLES

Several new crop varieties are now shipping out of Washington: Grannys, Fujis, and Red and Gold Delicious. Volume is increasing on organic fujis and grannys; good volume and price on organic galas. Great promo opportunities! Honeycrisps are slowly dropping in price with increased volume.



SOFT SQUASH, EGGPLANT & CUCUMBERS

Organic Zucchini

Baja is experiencing heat. Hermosillo is expected to start in two weeks. We have limited volume, expect some quality issues due to heat. Some misshaping and over-sizing.

Organic Eggplant

Delayed to start in our fields in Culiacan until October.

Organic Slicer Cucumbers

Good volume out of Baja, Mexico. Seeing more scarring and soft tips due to weather. Will transition to central Mexico in two weeks.

Persian Cucumbers

Extremely short right now. Limited volume out of Baja and Central Mexico, and markets are very high. This is for both organic and conventional. Increased production is not expected from Central Mexico until mid-October.

Cucumbers

We are seeing better supply; Nogales has started and the market should start coming up in the next two weeks.

Organic Hot House Cucumbers

Quality has been hit and miss due to weather. The next week or so, expect volume to get tight as we wait for the next cycle.

Organic Yellow Squash

Quality has turned to the worst due to weather.

Conventional Squash

Currently, supply is short due to the hot weather the last two weeks. Now that the weather is cold, product is not sizing up correctly. Market should improve in the next three weeks since Nogales will be starting. We are already seeing some product crossing.

BELL PEPPERS

Organic Colored Bells

Currently we're in the Holland season. Good volume on red; limited volume on organic orange and yellow. Sizing is pulling toward the smaller side, especially on yellow. We are planning on transitioning from Holland to Mexico this week and next week. We are seeing better sizing out of Mexico.

Conventional Bells

There are good supplies of hot house colored bell peppers coming out of Texas and Canada.

Organic Green Bells

We are currently growing in Portland. Expecting quality issues due to the fires up and down the West Coast.

Conventional Green Bells

Due to the hot weather the last two weeks and the cold weather now, quality on green bells is not great. Product is short and prices are up. Market will be affected until Mexico starts; it will transition into Coachella for a couple months until Nogales starts in December.

Organic Mini Sweet Peppers

We have started in Baja which has been hit with heat. Expect limited volume — prices are **HIGH!**

PUMPKINS

Excellent volume and quality on all pumpkins!

