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ON THE H O R I Z O N

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updates

**CROP &
MARKET**
INDUSTRY INFO





MARKET UPDATES

ROUND TOMATOES

Eastern round tomatoes remain on the shorter side this week as growers in NC, TN, and VA have been fighting rain. We should see a little more product next week but overall volumes will remain on the lighter side for the remainder of the season (until first frost) due to quality and yield issues. TN yields are down due to constant rain during the fruit setting process. For example, one grower expects to be down 300,000 cs for the season with no reduction in acreage. Lipman is back into the VA fields as we head into the weekend after sitting out a few days for rain. Our size profile remains consistent- a little smaller than desired- but quality is still above average. Barring any major weather, we should have VA tomatoes until mid-October, then will transition back to FL production. Looking to the West, it's been an up and down week for the CA grower group. Last week's heat wave will likely have an impact on the remainder of the season for most growers. Several are scheduled to finish up over the next 2-3 weeks, while Lipman should go another 7-10 days after that. Our last block's quality was a little rougher, but we just moved into a new planting that looks to be better thus far. The industry's size profile is on the larger side, with mostly J and XL fruit, but there is a grower or two with a good amount of 6x7's. As for Mexico, volume should improve from Jalisco and San Luis Potosi (eastern areas) as new fields bring more volume and bigger sizing. The new fields in San Quentin (Baja) has improved sizing and better overall availability despite the recent weather.

ROMA TOMATOES

The Eastern roma situation is similar to last week- light to moderate volumes available in several locations with the most product coming from TN/NC mountain growers. Persistent rains have had effects on quality and are now impacting yields as well. We'll start to see some growers wind down over the next few weeks while others will continue until first frost. By early-mid October, production will shift back to FL where they will start light and build to seasonal volumes in November. Western romas are coming out of WA, CA, and Mexico this week. The WA state program has been providing consistent volumes with solid quality and will continue until first frost. Further south in CA, overall volume has been relatively steady but will start to lighten up in 2-3 weeks as several growers finish up the season.

Lipmans crops have been in a light spot, but are moving back toward a normal pace this week. Quality has been variable throughout the industry, but our fruit is sharper than some due to our packing processes. Looking to Mexico, last week's storm impacted southern Baja's Fall crops much more significantly than northern Baja, where current harvests are taking place. So in the short we could see some weather-related quality issues and in the long term, we could see less supply for the than previously projected. East Mexico has multiple growing areas going (Jalisco, San Luis Potosi/Rio Colorado, Michoacán and Nayarit) and have had some weather but, in general, volume should be improving.

GRAPE TOMATOES

Grape tomatoes continue to be readily available in the East. We're harvesting consistent volumes in VA now but could see a little less volume over the next few weeks as temperatures begin to cool off. With product also available in TN, NC, and other areas, overall supply should be adequate to get us through until the FL season begins in early-mid October. Our quality and packouts have been good in VA, but it's a mixed bag in the TN/NC area, depending on rain levels. In the West, we are still in the process of cleaning up our Baja ranch and the outgoing roads. Our current block took the brunt of the storm and should limp into the end of the month but early reports indicate that future blocks (October and later harvests) fared better. Other growers in the area are still assessing damage but are likely to be in a similar spot. There is some product available from CA and WA programs that will help bridge us through until newer crops get rolling. Central Mexico production crossing into Texas remains steady but look for demand to strengthen on this product.

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COLORED BELL PEPPERS

As both Eastern and Western Canada growers are in the latter stages of the season, colored pepper production is gradually slowing and sizing has come down quickly. In the BC area, reds were the first to size down to mostly L fruit and now yellows are oranges have followed suit. Ontario houses are in a similar situation with any XL fruit being on the smaller end of the range and mostly L available on reds. Overcast conditions in Ontario have not helped the situation. Central Mexico producers expect lighter production for the next few weeks due to rainy and gloomy weather. However, we should start to see Fall crops come online in a few weeks and build to seasonal levels shortly thereafter.

CUCUMBERS

Eastern cucumber production is beginning to transition to the south. There's still product available in MI, NJ and NY but they are slowing down and will finish up in a few weeks. Our Eastern NC program is well underway and had been flushing, but we are in a 4-5 day gap as we wait until the next planting comes online next week. We expect to be back in good volumes then. Meanwhile, a few GA producers have gotten started in a light way. With NC and GA both moving into a stronger supply position, there should be adequate supply for the next several weeks. Quality is average from most growing areas, as there are some occasional issues with sunken areas, light color, etc. Looking to the West, Fall crops out of Baja were impacted by Tropical Storm Kay. The high winds scratched the cucs and we'll see scarring issues on all crop that was already hanging on the plant. This fruit will be in the system for the next 2-3 weeks. The next issue to be concerned about is the mildew. Typically we start seeing mildew about 10-14 days after the rain, caused by humidity in the shade houses. Growers have to stay on top of their spraying to control the mildew so if there's going to be issues, we'll start seeing this kick in next week. With WA growers finishing up this week, the Baja fruit will be the primary Western supply until Sonora gets a delayed start in mid-October.

YELLOW & ZUCCHINI SQUASH

Squash is still available in a variety of Eastern locations, but we are starting to see some of the northern areas like MI slow down and others (like NY) wrap up as cooler weather becomes more of a factor and the season nears its end. There are new crops underway in GA and more to come, so we'll start to see volumes there. Our Fall Eastern NC crops are well underway and have good volumes this week. Quality has been strong from the new crops so far, but there are some occasional issues from the fruit from older plantings. Santa Maria is producing good numbers on zucchini and yellow currently and should continue for the next few days. After that, supplies will begin to drop off as they move into their last fields of the season. The final fields should take them into mid-October before they finish. Quality is good on zucchini but a little more challenging on yellows. Early reports are that Mainland Mexico could see limited numbers of squash crossing in late September/early October.

ORGANIC ROMA TOMATOES

The organic roma situation looks similar to organic grapes—lighter production and potential quality concerns due to the rain on current plantings.

GREEN BEANS

Cooler weather is slowing down yields in several of the current production areas, so we'll expect volume to gradually decline from any of the more northern areas as the season winds down. New crops have begun on the coast of VA and they will be followed by GA and coastal NC programs in a few weeks. Overall supply is adequate and there haven't been any major quality issues. As for the West, CA growing districts continue to see limited volumes, most due to the heat. Although there is usually a late-season push in late September, we may not see that this year due to the recent heat wave. There's local product in WA state where they should stay relatively steady for a few more weeks before ending the season.

CHILI PEPPERS

Eastern chili pepper production continues to be in a fragmented state with small pockets of product here and there throughout active growing areas. MI and other areas are nearing the end of the season, but we should see some of the first GA chilies by the end of September. In the West, Central Mexico growers have been covering much of the demand and they've had some serious weather issues. Now Baja has experienced Hurricane Kay and crops were definitely impacted. The chili that took the hardest beating was the tomatillo. The outside of the husk looks good but the inside has a lot of cracking and decay. It'll be a couple weeks before we see better quality on the tomatillo. All the other chilies were also affected by the rains so we'll see quality issues there as well.

MINI SWEET PEPPERS

Mini sweet peppers have become a tough item in terms of supply. Minis took a major hit with the hurricane. A lot of plantings were heavily affected by the rains and the quality issues will linger and the plants themselves were damaged as well due to the high winds and excess water. Any new crop got scratched and bruised. As of today, mini sweets are in the hands of 2 shippers from Baja and 1 CA local grower but they're only in for a few more weeks. Supply will stay very limited the rest of the season until Nogales starts, which isn't scheduled to get underway until November if all things go well. We will continue to see a decline in mini supply as the lingering side effects of the hurricane hit the plants. There are some minis in Central Mexico, but much of that product is spoken for so it isn't much help. Canada has a limited amount of fruit but they are on the downhill side of the season and will wrap things up shortly.

ORGANIC GRAPE TOMATOES

We're starting to see lighter production out of Baja due to the rain. We are expecting supply to firm up going forward as yields will be down and there will likely be quality issues.

ORGANIC MINI CUCUMBERS

Supplies are light and will likely remain so for the remainder of the season due to the recent rains.



NEWS IN THE PRODUCE INDUSTRY

What's the Secret to Lipman Family Farms' Success? Its People

By **Carol Miller**

September 7, 2022

GROWINGPRODUCE.COM

Lipman Family Farms, renowned industry wide for its innovations in all aspects of growing vegetables, especially tomatoes, is in its fourth generation of family-owned farming operations. How it managed to reach its current heights is worth a closer look.

The secret to its success is deceptively simple: its people. It doesn't have a monopoly on creative, intelligent staff, however. So why is Lipman able to tap into the talents of its team so fully?

Lipman Family Farms doesn't lose sight of the importance of those bright minds. It created an internal structure that allows for innovative thinking rather than stifling it.

"It has always been a very people-focused company. It's really built into our DNA and our culture to its core," says Jaime Weisinger, Director of Community and Government Relations and fourth-generation Lipman family member.

Something as simple as testing a new product involves both an internal and an external team working together, says Jamie Williams, Director of Florida Farming for Lipman Family Farms.

You must pool the talents of those with technical expertise with others who look at the business process. You'll need them to support whoever ensures the product has room to perform without risking production levels if it doesn't work out. And to analyze complicated results, it often involves working with external scientists who gather and make sense of the data.

When it's all said and done, everyone along the way is watching for any business opportunities outside the limits of the trial.

It can be complicated. Such a process can and has paralyzed other growers, stunting potential growth. To successfully keep projects going is a lot like assembling a jigsaw puzzle each day, Weisinger says.

"You know, it's a lot of parts that come together to execute our business plan. And it's not just parts. It's people," he says.

How Trials Work at Lipman

Let's take a deeper look at the trials system, since it illustrates this cooperative teamwork so well.

The first step of any trial is to find the product or concept to test. And that starts with having enough connections that ideas come to you.

Lipman Family Farms actively supports state and national associations and Extension programs (e.g., University of Florida, Institute of Food and Agricultural Sciences).

The other researchers and fellow growers it meets helps them stay up to date on the latest methods. Just about everything to do with production is worth considering for a trial, Williams says. In just fertilizers, Lipman has taken a closer look at carbon in the fertilizer source, at different mixture of nutrients, and the different grinds on fertilizers to make them finer or coarser for slower or faster delivery.

Worthy test subjects include improving the quality of work, not just crop yield.

"One thing we're constantly thinking about is workers' experience and our employees out there in the field," says Elyse Lipman, Chief Strategy Officer and fourth-generation Lipman family member. "Are there ways that we can improve their experience, as well as efficiency?"

Lipman has trialed various automation technologies and harvest techniques in order to improve the labor experience involved in planting and harvesting and reduce the strenuous work these processes can require.

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Grocery price inflation hits another 43-year high in August

By **Jonathan Maze**

Sep. 13, 2022

WINSIGHTGROCERYBUSINESS.COM

Grocery prices are showing no signs of slowing amid still-soaring inflation rates.

Consumers paid higher prices for everything from cereal to eggs last month, sending retail food price inflation up 0.7% in August and 13.5% year over year, the U.S. Bureau of Labor Statistics said on Tuesday. The 13.5% increase was the highest rate for that number since March 1979, the latest in a string of four-decade highs for retail food price inflation.

Prices are up for basically everything. Over the past year, the price for breakfast cereal rose 23% and eggs increased nearly 40%.

Meat prices seem relatively tame by comparison. Meats, poultry and fish prices are up 8.8% over the past year. But poultry prices rose 15.9% as chicken and turkey producers continue working their way through a springtime rash of Bird Flu.

Driving much of the increase in grocery prices has been retailers' own rising costs for labor and food. Wage rates have soared amid historic shortages of labor, while those same labor concerns have helped drive up the cost of many food products. The war in Ukraine and other issues, such as a shortage of truck drivers, have also contributed to the problem.

Overall, food costs for consumers rose 11.4% over the past 12 months in August, the highest rate since 1979.

Prices at restaurants and foodservice operators increased 0.9% in August. Prices are up 8% over the past year as operators increased charges to consumers to offset their own cost increases for wages and food.

Much of that acceleration is due to sharply higher prices at school lunch programs, where many states ended free meals to students. Prices at schools and employee sites are up 23.7% over the past year.

But both full-service and limited-service restaurants continue to raise prices. Full-service restaurants increased prices 0.8% last month, higher than the 0.6% increase the month before. Limited-service restaurants increased prices 0.7%, down from the 0.8% they increased prices in July.

For the full year, full-service restaurants have increased menu prices 9%. Limited service restaurants increased charges 7.2%.

Overall, inflation rose 0.1% in August. But on an annual basis, the consumer price index slowed to 8.3% from 8.5% the previous month. Lower gas prices drove much of that slowdown.



UPCOMING EVENTS:

October 27-29, 2022

IFPA Global Produce & Floral Show

Orlando, FL

www.freshproduce.com/events

Lipman will be at booth 3462!

December 1, 2022

The New York Produce Show

New York, NY

www.nyproduceshow.com

PRODUCE BAROMETER:

ITEM	QUALITY	PRICING
Bell Pepper	Good	Steady
Cucumber	Good	Higher
Eggplant	Varied	Steady
Green Beans	Good	Steady
Chili's	Varied	Higher
Squash-Hard	Good	Steady
Squash-Soft	Good	Lower
Tomatoes	Good	Steady

NEW JERSEY DEPARTMENT OF AGRICULTURE VISITS LIPMAN FARMS

New Jersey Secretary of Agriculture Douglas H. Fisher last week visited the Lipman Family Farms Value Added Facility in West Deptford, and ZRH Farms, to highlight the company's partnership.

In addition to ZRH Farms, Lipman also supports a number of other local producers, including F&R Grasso Farms, Angelo Grasso & Son Farm, Triple B Farm, each in Gloucester County, Spina Farms in Salem County, and R & R Flaim Farms in Cumberland County. The produce that Lipman processes and distribute includes, but is not limited to, green bell peppers, chili peppers, eggplant, hard and soft squash, and vine ripe tomatoes.

"Lipman Family Farms is very supportive of our farmers here in the Garden State, and they move significant volumes of produce in this region and all around the nation," Secretary Fisher said.



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