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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

FL's minimal post-hurricane round tomato production looks to be at its lightest point for the next few weeks. Lipman didn't harvest any fruit this week but will harvest a few 2nds from P/R as we move into next week. A few other growers are also harvesting scant volumes, but nothing significant. Sizing is mostly 6x7's across the industry and quality is generally not retail caliber. As we move into Naples crops in about 3 weeks, we'll see quality improve as fruit hadn't set on these crops when the storm came through. But, it's still looking like January 1st until both quality and volumes return to normal levels. Round tomatoes have become even more snug in Mexico. Eastern Mexico and Baja's crops are in the seasonal decline now which doesn't leave much product to fill demand until Culiacan/West Mexico gets started in late December. Quality has been on the rougher side this week with bruising and abnormal color showing up from some shippers.

ROMA TOMATOES

FL growers, including Lipman, continue to harvest minimal volumes of romas from hurricane salvage crops. Sizing is down significantly- mostly L and M fruit instead of J and XL- and quality is a challenge. Although volumes aren't expected to improve until January, quality from upcoming harvests looks to improve over the next few weeks. With that being said, the entire US is still looking to Mexico for romas. Both Baja and Eastern Mexico are moving into the seasonal decline at this point, so supply could get even more snug until we see the West Mexico fruit in mid to late December. Quality can vary significantly, but there is some nice quality fruit out there.

TOV

TOV volumes are pretty consistent in the West, with decent availability at all crossing points. Quality and sizing are good. Canada is almost finished for the season with another week to go.

GRAPE TOMATOES

2 wk-light supplies in both East & West; 4 wk- new crops start in MX ; 6 wk- MX volumes increase and new crops start in FL

COLORED BELL PEPPERS

Canada's colored pepper production is winding down quickly. Reds are completely finished now and there will be just a few yellows and oranges that may stretch into next week, depending on quality. The house cleanout and replanting process will be underway, with production expected to start back up in mid-March. In the meantime, Central MX looks to be the primary area for supply until January when growers in the Culiacan area get started. Central MX's production has been consistent but on the light side overall with reds have been especially snug. Quality looks good although there is one grower with some problem fruit.

GREEN BELL PEPPERS

GA pepper growers picked heavy ahead of some cold weather, bringing a decent amount of fruit to market this week. Quality is challenged from some, as a lot of what's been harvested is from older plantings and has stem and bruising issues. There are a few more new fields to go, but GA looks to wind down over the next 7-10 days, leaving Eastern production in FL's hands. So far, FL's production has been light as early harvests are those that were affected by Hurricane Ian with reduced yields and some quality issues. However, farms are starting to work through this and should be back with full production and better quality by the first of December. XL sizing is snug this week, as harvests are either crown picks with jumbo/2X sizing or are grading out as choice due to weather effects. In the West, the CA desert and Mainland Mexico are providing adequate supply. The desert will go another week before ending the season while Sonora growers will continue with light supplies as we wait for Sinaloa farms get started with bigger volumes in December.

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CUCUMBERS

GA still has some cucumbers to offer, although they are mostly offgrades at this point and not suitable for retail purposes. The bulk of Eastern product is coming out of FL this week. As farms work into 2nd crops, production is lighter. Growing conditions haven't been ideal and 60-70% of the harvests are being classified as offgrades, although condition has been good.

Look for FL to continue with light retail supply as we wait for Honduras to get rolling in December. We expect to see at least one Honduran grower to start by the 2nd week of December and others to join in shortly thereafter. As for the West, good volumes are available in Nogales as both Sonora and Sinaloa farms are in full production mode. Quality has been nice and should continue to be so as weather conditions stay favorable.

YELLOW & ZUCCHINI SQUASH

Squash supply has tightened up this week. With GA out of the picture and Plant City's start delayed by Hurricane Ian, the only squash in the East has been from the light plantings in south FL. Yellows are especially tight and much of what's available has quality issues. We do look to see some Plant City crops that were planted post-hurricane get started next week which should provide a boost to current supply and quality. In the West, cool weather in the growing areas has slowed down production and supply is lighter. Yellow squash numbers are especially light as some growers have reported disease issues in the current crops. Overall quality is decent, as long as the fruit is fresh. New acreage should kick in with stronger production in the next week or so.

EGGPLANT

GA's eggplant supply and quality are waning and volume remains light in FL, but there's enough product available to meet demand. Plant City is normally a factor this time of year, but Hurricane Ian significantly impacted their production plan. Lipman been working some eggs in south FL this week and our quality has been very nice. The West has good volumes and quality coming into Nogales, which should continue for the foreseeable future.

CHILI PEPPERS

We're starting to see a few more chili peppers in the East from south FL and now Plant City. Plant City's start was delayed by Hurricane Ian and overall volume is likely to be lighter this season, but we should start to see more volume and varieties as these crops come online. In the meantime, south FL has pretty decent volumes of poblanos, jalapenos and Cubanelles. Serranos are very limited at this point, but we hope to see some out of Plant City eventually. In the West, volume is on the light side this week for most varieties, especially serranos. The only item available in abundance is tomatillos. Salsa verde, anyone?

MINI SWEET PEPPERS

Mini sweets continue to be very limited with only one shipper in Baja and one or two shippers in Nogales that have fruit. Quality is good, but there are some sizing issues, which is common when supply is this short. A significant increase in volume isn't expected until mid- December.

GREEN BEANS

Green beans were still short going into Thanksgiving, but availability looks to improve post-holiday. GA has finished up but we're starting to see a few more light harvests in north FL, central FL and the Homestead area. Yields have been very light so far, but look to improve for future harvests. Western bean production is also showing signs of life. CA areas continue with minimal and sporadic offerings, but we have started our Guasave deal in a light way and a few other growers have started to bring product into Nogales as well. Look for supply to strengthen in both the East and West over the next week.

HARD SQUASH

There are light volumes coming out of MI, GA, CAN, and NY with a variety of quality. There have been significant issues with scarring on both butternut and spaghetti from domestic producers, so that has limited availability to a point. In the West, it is now a Mexican deal on hard squash. Volumes have been pretty consistent with no major quality issues.

ENGLISH CUCUMBERS

Mainland Mexico is in full supply and there's plenty of product available.. Quality has been good and we don't expect to see any issues unless inventories get backed up. Canada's supply is winding down quickly and should finish up completely over the next few weeks. Our local HH farm in FL is back online in a light way.

ORGANIC GRAPE TOMATOES

Organic grapes are especially snug this week as Baja is on its last legs of production and we won't see new crops out of Mainland Mexico for another week to 10 days.

ORGANIC ROMA TOMATOES

With Baja almost finished, the majority of supply is coming from Central Mexico. We don't expect any major change until late December/early January when Sinaloa's crops get rolling.

ORGANIC MINI CUCUMBERS

Volumes have been consistent from newer crops in Mainland Mexico and supply seems to be adequate.



NEWS IN THE PRODUCE INDUSTRY

Inflation growth slows to 9-month low

By *Diane Adam*

Nov. 10, 2022

WINSIGHTGROCERYBUSINESS.COM

Consumer prices in October rose 0.4% for the month and 7.7% year over year, its lowest annual increase since January, the Bureau of Labor Statistics reported. Thursday.

There was a cooling off as well for all items, less food and energy, which rose 0.3% in October—a big dip from 0.6% in September, the Bureau of Labor Statistics' (BLS) October Consumer Price Index (CPI) revealed.

The food index increased 10.9 % over the last year—all of these increases were smaller than for the period ending in September, BLS reported. The food index increased 0.6 % over the month, with the food-at-home index rising 0.4 %.

"The October CPI further illuminates the challenge that Americans have faced for months," said Andy Harig, FMI's VP of tax, trade, sustainability and policy development, in a statement. "The cost of consumer goods continues to rise, adding pressure on budgets across the country. Grocery stores, and the entire food industry, are doing all they can to ensure Americans have options to stay within their grocery budget and remain committed to working with their customers to help mitigate the impacts of inflation."

Thursday's CPI numbers "make it clear that this is still a difficult time for consumers," Harig said. "While myriad factors influence food prices, the food industry is collaborating throughout the entire supply chain to keep costs low for consumers."

When it comes to winning in the face of inflation for retailers, Matt Pavich, senior director of retail innovation for Revionics, an AI-powered retail price optimization solutions company, told WGB in an email that discounters are leading.

"It's no secret why Aldi has become one of the largest grocers during a period of high inflation and uncertainty," Pavich told WGB. "Budget constrained shoppers are migrating to brands like Aldi for their fantastic pricing on quality items. Food remains one of the largest household expenses for the average family and getting more value from each basket can play a significant role in navigating today's high-cost landscape."

Grocery items seeing notably high inflation in October include:

- Eggs, 43%
- Flour and prepared flour mixes, 24.6%
- Butter and Margarine, 33.6%
- Crackers, bread and cracker products 18.7%



How Quality Paid Programming Makes a Difference for In-Store TVs

WINSIGHTGROCERYBUSINESS.COM

Oct. 12, 2022

Options abound for grocery and convenience retailers looking to add an entertainment solution to their stores, but not all programming fits every store or consumer base. Flexibility and customizability are key attributes to look for in an entertainment provider—and paid programming can make a big difference. Getting entertainment right

Having in-store televisions is quickly becoming table stakes for retailers of all stripes. According to Technomic's 2021 Supermarket Intelligence Report, 31% of supermarkets currently have televisions installed, and 59% of retailers without TVs say they intend to add them in the next three years.

It's no surprise that adding and enhancing in-store media options is a chief strategic priority for many retailers: Grocers using TVs list greater cart averages and improved customer loyalty among the benefits. In-store entertainment appeals to convenience shoppers, too. And according to Technomic's recent State of the Convenience Foodservice Industry report, most (53%) c-store consumers say stores with TVs appeal to them. For retailers utilizing televisions inside their stores or planning to add them soon, cable services, local TV channels or ad-supported streaming services may be serviceable options, but opportunities to truly engage with shoppers and stand out from competitors with these solutions are limited.

Retailers say that finding a good fit for the store's specific consumer base and having a variety of programming options at their disposal are top priorities: According to Technomic's Supermarket Intelligence Report, 22% of supermarket retailers say that the most important attribute they consider when selecting a media provider is that the programming appeals to their customers in particular, and 15% say the same of having a wide selection of programs to choose between.

Paid media services, as opposed to alternative options, offer better customizability to tailor programming not just to the store's consumer base, but even to certain seasons, events and times of day.

Customized solutions, dependable service

The quality and availability of technical support from a leading media partner, such as DIRECTV National Accounts, can also make a major difference. According to Technomic's Supermarket Intelligence report, the No. 1 attribute retailers look for when selecting a media provider is good customer support, and for good reason. Among retail locations currently using live TV or streaming TV, loss of connection and equipment failure; lack of in-house technical support and provider customer support; and difficulty of use and setup are the most common issues.

It's safe to assume the need for fast, effective support is only augmented by current labor struggles, as 82% of retailers say they're struggling to hire enough workers at the store level, according to Technomic's April 2022 C-Store Operator Update.

Best-in-class solutions from DIRECTV for BUSINESS National Accounts allow supermarket and convenience retailers to leverage all the benefits of in-store TV entertainment without the hassle. With a range of premium content and 4K programming, a support team available 24/7 and 99% system reliability, every retailer can find the solution that's right for their stores and customers. To learn more, [click here](#).



UPCOMING EVENTS:

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	Lower
Eggplant	Varied	Lower
Green Beans	Good	Elevated
Chili's	Varied	Steady
Squash-Hard	Good	Steady
Squash-Soft	Good	Higher
Tomatoes	Good	Elevated

HAPPY THANKSGIVING FROM LIPMAN FAMILY FARMS

Try this Pumpkin Baba Ghanoush to spice up your holiday dishes!

[Check out the full recipe here!](#)

