

DECEMBER 8, 2023

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# ON THE H O R I Z O N

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updates

# CROP & MARKET

INDUSTRY INFO







# MARKET UPDATES

## ROMA TOMATOES

FL's roma tomato volume is on the lighter side this week as some growers gap during the transition to areas south of R/P. Lipman has already made the move and has been harvesting in Labelle. We have about 10 days to go in Labelle but will start on the Naples farms within the next week. Current sizing is down a little from what it was- less jumbos and more XL and L fruit but quality has cleaned up and looks to be very nice from the Naples crops. Look for production to be a little more steady next week. Product is short in MX this week as both Baja and East MX are seeing supply drop off for the season. We're waiting for West Mexico to start in a light way somewhere between December 13th and 20th, with more seasonal volume after the New Year. Current quality ranges from average to not so good as growers push the pack to fill orders.

## ROUND TOMATOES

As an industry, volume and sizing are down a little in FL this week, primarily due to cooler temperatures. A few growers that are still going in P/R and will gap before they get started in more southern areas. Lipman is harvesting in both Labelle and Naples this week. We'll carry on in Labelle for another two weeks, but will then be in the Naples farms for the next several weeks. Quality is great, but sizing is down due to cool weather and rain with a limited percentage of anything larger than a 5x6. In the West, East MX and Baja still have fruit but volume is declining and quality is just okay. We're anxiously awaiting the Culiacan area to get started in a light way between December 13th and 20th, with volume after the new year.

## GRAPE TOMATOES

Grape tomatoes continue to be very short in both the East and West. Low temps in the 40's & 50's keep cycling in south FL and have significantly slowed down grape tomato production. As an industry, production is currently about 1/2 of what it was the same time last year. Lipman will still harvest in Labelle for another week or so but has also started in Naples. At this point, yields are down but the quality is very nice. MX's volume also remains light and late. There are a few grapes coming out of Sinaloa now, but the majority of growers are running late due to the Fall hurricane's impact. We expect to see more adequate

numbers by the end of the month. Quality has been just so-so out of MX, as is common when supply is so short and growers push to fill the orders.

## TOV

TOV supply out of MX is enough to meet demand this week, but we do expect to see supply lighten up as we reach the upcoming coldest, darkest time of the year where supply usually becomes snug.

## COLOR BELL PEPPERS

Red, yellow and orange bells have become very snug this week. Central MX 's production has been limited by cold and cloudy weather and we're seeing more green cast on inbound fruit. We should see improvements in about two weeks and much better availability by the early part of January, when the west MX crops are expected to come online.

## GREEN BELL PEPPERS

Surprisingly, there's still a little GA fruit available as some growers didn't get hit with the recent hard freeze, but they should be wrapping up shortly. The majority of Eastern availability is coming from FL. There's a lot of jumbo and 2X sizing this week, as many are in crown picks, but there are also adequate levels of choice and smaller fruit as older plantings get cleaned up. It's the XL size that is slightly snug but available. There have been some bruising concerns on the south FL product, as they have encountered a couple rounds of rain, but overall quality is still stronger than anything remaining in GA. In the West, peppers have made the transition to MX. Some growers have started earlier than originally planned and supply is strong. Quality and sizing options are good as well. The CA desert will carry on for another week also.

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## GREEN BEANS

Eastern green bean supply is somewhere between light and moderate. With GA out of the deal now, it's up to south FL, the Lake area and north FL to provide supply and it is mostly adequate. Quality has been nice with no major issues. After experiencing a bit of a flush, bean farms in Mainland MX are in a lighter spot this week, in part, due to the effects of the prior weather. Quality is just average but should clean up as they roll into new blocks by the first week of January.

## YELLOW & ZUCCHINI SQUASH

With GA completely out of the way, Plant City between fields and south FL crops impacted by recent rains, Eastern squash volume continues at lighter levels. We should see a little more fruit in the next 7-10 days. Quality is average. Looking to the West, supply remains snug as production transitions from Sonora to Sinaloa. Volume will gradually increase over the next few weeks as more Sinaloa-area growers come online with seasonal levels available by the end of the month.

## CUCUMBERS

As Fall crops begin to wind down, FL's cucumber supply is lightening up. There will still be a few FL cucs here and there, but the bulk of volume will move to Honduras by late December. We expect to see a little of the import product as early as next week but they won't be at full volume until the end of the month. Current quality is still pretty nice, but there are less supers being harvested now. Western cucumber production is a bit lighter as cooler weather has slowed production. Quality and color continue to be very nice though.

## HARD SQUASH

There are still a few growers with storage crops in the East, but quality is varied. Most will be looking West for supply until the Honduran program starts in January. In the West, Sonora and Sinaloa are both in season, providing good volume. We've seen some acorn with excessive ground scar, but good quality is available on acorn, butternut, spaghetti and kabocha with a variety of sizing options.

## CHILI PEPPERS

Eastern chili pepper volumes are pretty good for this time of year, although not all varieties are available (no tomatillos and not a lot of serranos). Plant City, Immokalee and the East Coast all have some product with jalapenos being the most plentiful. Plant City is the area with the most volume and varieties and they should continue through December, when they will then leave supply to south FL. In the West, volumes are picking up out of Mainland MX and should continue to do so for the next few weeks. Jalapenos and serranos are the most plentiful with poblanos still being a bit snug. However, growers are just getting started with poblanos, so we should their availability improve over the next few weeks as well.

## CALABACITA

Calabacita is also in a snug spot, but should see improvements over the next week or two.

## EGGPLANT

Plant City's eggplant volumes are lighter than usual this year, but we are beginning to see a few more eggs available in south FL where production will continue through the Winter months. Mainland MX's supply continues to gradually increase and is nearing seasonal levels with nice-quality fruit. The CA desert is also trickling along for another 7-10 days, making it a record-long season for them.

## ORGANIC GRAPE TOMATOES

Organic grape tomatoes are still very limited. Guasave has started in a light way, but there's really not much volume at this point. Fortunately, it looks like Culiacan will get started in the next couple of weeks and help to bring supply back to more reasonable levels.

## ORGANIC ROMA

Organic roma supply is holding pretty steady in Baja and Central MX. We'll see Western Mainland MX start up in the next few weeks, taking up where Baja leaves off. Quality is solid although most of the fruit is coming in at a very light color stage.

## ORGANIC MINI CUCUMBERS

Cooler weather in Mainland MX has slowed down the harvests on mini cucumbers crossing into Nogales. Supply is adequate but volume deals have disappeared. Baja is also still in production.

## ORGANIC MINI SWEET PEPPERS

Organic mini sweets look to be limited through the end of the year. Growers in the Sinaloa area have normally started by now, but the prior hurricane has set them back with an adjusted start date of first week of January. The current color mix is not optimal, as there are only a few oranges available.





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Oct. 03, 2023





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