

NOVEMBER 22, 2024

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updates

CROP & MARKET INDUSTRY INFO





MARKET UPDATES

ROMA TOMATOES

With salvage harvests in the Palmetto/Ruskin area finished and storm-damages in South Florida, Eastern roma production has gone dark with virtually no fruit available this week. We don't expect significant change until mid-December when storm-affected crops start with light yields. Weather willing, we should see Florida's roma production return to normal levels after the 1st of the year as the first crops not affected by the hurricane in the Naples/Immokalee area come online. Mexico is also in one of the lightest production points of the year. Both Baja and Central Mexico are in the seasonal decline stage with size and volumes diminishing. Quality can be hit or miss but is mostly average. Availability is expected to remain snug until Mainland Mexico's winter crops come online in mid-late December, with stronger numbers after January 1st.

ROUND TOMATOES

Florida is coming into the tightest window of post-hurricane operations for the next few weeks. Salvage crops are finished. The only product out of Florida will be very light yields from the limited amount of storm-damaged plantings that survived, which will be minimal volumes. By mid-December we will start to see gradual improvements with normal levels of harvests after January 1st. Moving to the West, Baja's supplies are light as growers in the northern area are winding down, leaving a few in the southern area. Central Mexico's production is starting to taper off as well, with mixed reports on quality. A few growers in Mainland Mexico (Culiacan area) may try to come online early, but we don't expect significant volumes until January.

GRAPE TOMATOES

As with other types of tomatoes, grape tomato production is at a very light level in Florida. Current harvests are coming from crops that were impacted by Milton and growers are experiencing very light yields at this time. We expect to see a few more in early December as plants that have re-grown since the hurricane are harvested, but production isn't expected to rebound to normal levels in Florida until the latter part of December. Mexico's volume has lightened up out of both Baja and Central Mexico as they work through the seasonal decline and some in Central Mexico experience a gap in production. Volume is expected to pick up in mid-late December when the Culiacan area gets started.

CONVENTIONAL TOV'S

There aren't a lot of TOV's remaining in Canada, as their season is coming to a close quickly. The majority of supply is coming out of Central Mexico where volume is mostly consistent but demand has strengthened. Production should remain near current levels until new crops come online in mid-December.

ORGANIC GRAPE TOMATOES

Organic grape tomatoes are in very short supply this week as both Baja and Central Mexico are in their downswing of the production cycle. Sinaloa is running a little behind their normal schedule and won't start until mid-December, so supply will likely remain tight until then. Despite current production areas in decline, quality is maintaining at good levels.

ORGANIC ROMA TOMATOES

Organic roma supply is lighter this week, but there is enough fruit to meet demand. Both Baja and Central Mexico have fruit and quality is good. The only issue we've experienced from some is light color upon arrival.

GREEN BELL PEPPERS

Eastern bell pepper supply looks to remain very light with challenging quality for the next few weeks. Georgia is winding down but will keep going as long as possible due to the current supply situation. Quality has been marginal with scarring, color and stem concerns as the most common issues. Florida's production has been limited to salvage picks from storm-affected crops which are yielding less than desired quality and minimal numbers. We should begin to see some new crops come online in South Florida over the next few weeks, hopefully moving into more seasonal numbers by mid-December. In the West, supply continues to be significantly less than demand. Coachella has light volumes of nice, but pricey fruit and should go another 2-3 weeks. But, it's Mexico that will bring more significant volume when they move into full production right around December 1st. We're seeing a few begin to cross now with good quality but sizing is still on the smaller side.

CALABACITA SQUASH

Calabacita volumes are mostly adequate, but on the lighter side as cooler weather has impacted crops in Sonora. Look for improved volumes once the transition to Sinaloa takes place.

YELLOW AND ZUCCHINI SQUASH

Eastern squash volumes have dropped significantly and quickly over the past week. Cold weather is pushing Georgia crops to the finish line and quite a few growers there and in Florida plowed crops under due to poor market conditions. Most of what's available is coming from South Florida and Plant City. Quality has cleaned up and is mostly good now that growers have exited older fields. In the West, supplies continue to be lighter out of Sonora due to cooler weather and availability is now on the snug side. Sinaloa has started in a light way but we don't expect a big change in volumes until production fully transitions to this area in December. Quality continues to be good on both colors.

GREEN BEANS

Eastern bean supply remains very snug going into the Thanksgiving holiday. Although Georgia still had a few beans earlier in the week, they are near the end of the road and will be finished up over the next few days. There's some light production in the Labelle and South Florida areas now but we don't expect major volume changes until new crops get started in South Florida in early-mid December. In the West, the majority of what's available is coming out of Central Mexico where there have been occasional reports of quality concerns. We're starting to see a few out of Sinaloa this week, but are awaiting this area to fully come online right on or after Thanksgiving.

CUCUMBERS

With Georgia on the last legs of its season, Eastern cucumber production is limited to light volumes coming from storm-affected crops in South Florida. Quality has been better than expected although there are reports of light scarring. We're expecting a little shot of production to come online in the next few weeks, but volumes will remain on the light side. We have seen a handful of early cucumbers come from Honduras already, but the bulk of their crops won't be coming in until mid-late December. Looking to the West, Mexico continues to have moderate to good supplies coming from multiple areas (Baja, Sonora, Sinaloa and Central Mexico). We expect to see production levels increase a notch over the next few weeks as more Sinaloa crops come online. Quality is not quite as sharp in Sonora due to light color, but is good in the other growing zones.

EGGPLANT

Eastern eggplant harvests have picked up a little and supply is mostly adequate with fruit still coming from Georgia, Plant City and South Florida. Overall quality has been good with no significant trouble reports. Western supply is picking up now that more Sinaloa crops are up and running. Volume should continue to increase over the next few weeks, providing consistent, moderate to strong supply for the immediate future. Coachella is also still in the game for now, but will wind down in the next 10-14 days. Quality is good from all areas.

CHILI PEPPERS

Eastern chili pepper production is at minimal levels, with small pockets scattered about in Georgia, Plant City and South Florida. Cubanelles, long hots, and Hungarian wax peppers are very challenging to find. There won't be much change in current production levels until South Florida plantings come online in early-mid December. Fortunately, Mainland Mexico's crops are kicking in, providing moderate, consistent volumes on all but Anaheims, which are still snug. Baja still has chilies, but volume and variety options are lessening as they are in the latter stage of the season. Overall quality has been nice from both areas, although there have been some concerns with tomatillos.

MINI SWEET PEPPERS

Mini sweet pepper supply is extremely limited, as are all but two growers have finished for the Fall season. There's one grower in Baja and another in Central Mexico, with neither having enough fruit to go around. This has created a significant shortage, and we anticipate availability will remain extremely limited until Mainland Mexico begins production in January. Quality continues to be good, although there has been some small sizing on the Central Mexico product.

RED, YELLOW & ORANGE BELL PEPPERS

Canadian colored pepper production looks to be finished in the next few days as the season officially comes to an end. Without this supply, we expect availability to remain snug for a few more weeks as Central Mexico is basically the only area in production right now. Mainland Mexico's crops are expected to get started in mid-late December, with seasonal volumes after the 1st of the year.

MINI CUCUMBERS

Mini cucumber production is steady in West and Central Mexico. Some quality issues have been reported, but this varies by grower and lot.

ENGLISH CUCUMBERS

With Canada moving into the Winter slow-down mode and cooler weather in Mexico, there are less English cucumbers available this week. Mexico's quality has been average from some, requiring a close eye to meet customer expectations.

ORGANIC SQUASH

Organic squash production has lightened up significantly as Sonora's cooler weather has slowed things down. Zucchini's are shorter than yellows, in part due to the higher demand. Quality is good, but not perfect, on yellows and lesser on zucchini, as there has been scarring and scuffing mixed in with nicer fruit. Look for improvements when Sinaloa gets going in mid-December.

ORGANIC MINI CUCUMBERS

Organic mini cucumbers are still available out of Baja with hit or miss quality. Supply is adequate, but one has to make sure to find the right fruit. Quality and volume should begin to improve next week as new growers in the Hermosillo area start up.

ORGANIC RED, YELLOW & ORANGE BELL PEPPER

Although there seem to be a few more available this week, organic colored bell peppers remain a snug commodity. Central Mexico is the primary area of production and these crops are on the decline. The next major area of production will be Culiacan and they aren't scheduled to start until the 1st of the year, so supply looks to remain at a similar level for the next 4-5 weeks. We expect to see greening concerns during this time.

WATERMELONS

Domestic watermelon supply has been very minimal this week. Some new fields in Immokalee are due to come online in the next few days, which should provide supply for 3-4 weeks, pending quality. However, overall volumes will remain light, as there are only a few Florida growers that will be in production during this window. Mexico also has fruit, but quality is not strong enough to travel.



NEW FMI REPORTS EXAMINE GROCERY SHOPPING TRENDS FOR THE HOLIDAYS AND RETAIL FOODSERVICE

[PRODUCEBLUEBOOK.COM](https://www.producebluebook.com)

NOVEMBER 19, 2024

Despite ongoing concerns about food prices, shoppers feel more confident in managing their grocery budgets ahead of the holidays, according to FMI —The Food Industry Association's BB #:162464 annual U.S. Grocery Shopper Trends: Holiday Season report.

These findings are further supported by FMI's newly released ninth-annual Power of Foodservice at Retail report, which found that retail foodservice purchases continue to play a key role in shoppers' meal preparation.

Consumers report a strong sense of excitement and enthusiasm for the holiday season despite concerns about rising prices. Seventy-three percent of those celebrating holidays report feeling very or somewhat excited about the holiday season. Furthermore, with 85% of shoppers reporting at least some control over their grocery expenses, shoppers are feeling more prepared to tackle holiday shopping this year.

"While consumers remain understandably concerned about the cost of food impacting their holiday meal preparations, we continue to see remarkable resilience and adaptability among shoppers," said FMI President and CEO Leslie G. Sarasin. "Whether it be shopping deals and sales or choosing store brands, Americans are stocking up and preparing for the holidays early and eagerly."

The "hybrid" approach to meal preparation – which integrates retail foodservice items like deli-prepared foods into weekly grocery shopping – is also increasingly popular, with shoppers reporting they prepared and ate more dinners at home in 2024 than at any time since 2020. Shoppers recognize that semi- or fully-prepared items from their food retailer are valuable, budget-friendly options to supplement or even stand in for a meal cooked from scratch at home. In 2024, according to NIQ, sales of retail foodservice prepared foods increased by 1.4% to roughly \$50.9 billion. This trend is expected to continue into the holiday season as well, with 13% of shoppers reporting they will purchase more prepared foods from food retailers compared to last year.

Among those who celebrate this holiday season, nearly 60% of shoppers said that enjoying harmonious, quality time with family and friends is the most important ingredient for a successful holiday, followed by 32% who cited creating a great homemade feast. To make these goals a reality, 40% of consumers are preparing for the December holidays more than a month in advance.

FMI's U.S. Grocery Shopper Trends: Holiday Season survey also revealed:

- Weekly grocery spending has remained consistent this year, with an average of \$158 per week.
- 39% of holiday shoppers are extremely or very concerned about potential out-of-stocks for key ingredients. Among families with children, this concern rises to 44%.
- 46% of shoppers say they would prepare a familiar alternative dish if their preferred ingredients were unavailable, and 30% are willing to try a new recipe.

FMI's The Power of Foodservice at Retail 2024 survey also revealed:

- Total deli sales reached approximately \$450.9 billion, reflecting a growth rate of 1.4% in dollars and 1.2% in units over the past 52 weeks. Shoppers' desire for convenience and affordability is driving this trend.
- 70.7% of households buy foodservice at retail products regularly, with an average purchase frequency of 9.5 times per year and an average transaction size of \$8.30.
- The frequency of shoppers preparing dinner at home at least seven times per week increased slightly this year from 21% to 23%.
- 63% of shoppers say they put at least some focus into eating nutritious options when buying deli-prepared foods from grocery stores.
- 59% of shoppers want the opportunity to buy a combination of prepared foods – main course, sides dishes and dessert for a set, discounted price.



RESTAURANT SPENDING REACHES NEW HIGH COMPARED TO GROCERY SHOPPING

SUPERMARKETNEWS.COM

NOVEMBER 15, 2024

Restaurants' market share was 56.4% in October, with groceries and supermarkets making up the rest, according to data released Friday by the U.S. Census Bureau.

"This is a new all-time high for the domestic restaurant industry in this regard," Mark Kalinowski, president and CEO of Kalinowski Equity Research, said in an analyst's note. "The year-over-year gain was about 40 basis points, marking slight sequential acceleration from September 2024's 30 basis-point market-share rise."

Retail sales for September were also revised upward, the Census Bureau said.

"After the uptick we witnessed in September—which was later revised even higher—the U.S. Census Department of Commerce reported more good news in October," said Chip West, retail and consumer behavior expert with Chicago-based RRD. "Retail sales increased 0.4% month-over-month and 2.8% year-over-year, highlighting continued healthy consumer spending."

West noted that many businesses were imposing return-to-office requirements, which were "expected to positively impact the restaurant category, which saw a slight bump in October," West said.

"Dining establishments, which have faced significant challenges due to the loss of weekday foot traffic since the COVID-19 pandemic, are likely to benefit from an increased presence of in-office workers," West said. "This resurgence in workplace activity could help drive weekday lunch and happy hour traffic, providing a much-needed boost to these businesses."

As the winter holidays approach in November and December, West said restaurants with catering options, "will certainly have an opportunity to promote and attract the number of consumers that are planning to host holiday celebrations this year."

Kalinowski noted that while restaurant same-store sales gains slowed noticeably through the end of the third quarter, "it appears perhaps a little more likely that the worst is over."

Kalinowski also said the restaurant industry would begin to lap easier same-store sales comparisons in 2025.

He said it was important to note that overall spending on food and beverages did not grow in January-October 2024 as fast as it was growing in the same periods in the past three years.



UPCOMING EVENTS:

DECEMBER 10-12, 2024

**NEW YORK PRODUCE SHOW &
CONFERENCE**

**SHERATON NEW YORK TIMES SQUARE HOTEL
NEW YORK, NY**

www.nyproduceshow.com

JANUARY 13-14, 2024

GLOBAL ORGANIC PRODUCE EXPO

**JW MARRIOTT MIAMI TURNBERRY RESORT
& SPA**

ADVENTURA, FL

[www.events.farmjournal.com /gopex2025](http://www.events.farmjournal.com/gopex2025)



Take a look at some of the great things Team Lipman did during our Day of Good!

FARM 15- DUETTE, FL

IN COLLABORATION WITH DUETTE FIRE RESCUE, TEAM LIPMAN ASSISTED BY PASSING OUT SUPPLIES SUCH AS WATER, ICE, TARPS AND MRE'S TO THOSE AFFECTED BY THE HURRICANE. THEY ALSO DONATED MEAT TO FOOD FOR TUMMIES. TINA LAIRD AND JEREMY MELVIN LED THESE EFFORTS.

NEW JERSEY

LIPMAN NEW JERSEY VOLUNTEERED AT THE GREATER WOODBURY FOOD PANTRY, HANDING OUT BOXES OF PRODUCE AND TOTE BAGS FILLED WITH NON-PERISHABLE ITEMS. THEY ALSO HOSTED AN EMPLOYEE DIAPER DRIVE AND DONATED THE DIAPERS TO THE SOUTH JERSEY DREAM CENTER. KELLY LICHOROBIEC AND PINA QUATTROCHI CHAMPIONED THESE ACTIVITIES

HERMOSILLO, SONORA, MEXICO
KARIM ORTIZ AND KARLA BARRAZA LED THE HERMOSILLO TEAM IN HOSTING A HEALTH FAIR FOR 70 CHILDREN IN THEIR COMMUNITY. THE CHILDREN RECEIVED FREE MEDICAL CONSULTATIONS, EYEGASSES, PREVENTIVE INFORMATION AND FOOD DONATIONS TO GIVE THEM A GREAT START TO BETTER HEALTH.



CLARKSVILLE, AR

THE ARKANSAS OFFICE, LED BY LISA HAMPTON, VOLUNTEERED AT THE JOHNSON COUNTY SENIOR ACTIVITY CENTER. THEY DONATED BINGO PRIZES AND SPENT TIME PLAYING BINGO WITH THE CENTER'S PATRONS.