

On The Horizon

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Market Update

Tomatoes: With Virginia on the tail-end of its season and Fall crops a few weeks away, Eastern markets continue to rely on local programs to fill demand for round tomatoes. Quality is varied, depending growing area and weather conditions. Michigan is coming in with some nice romas, while Maryland and Virginia have steady volumes on grapes.

Despite California and Mexico growers transitioning from Summer to Fall acreage over the next few weeks, supply and quality on rounds and romas should remain consistent. Grape volume is beginning to ramp up in Baja and Mainland Mexico, although there have been some quality concerns on early fruit. Cherries are very short throughout the country.

Bell Peppers: Bell pepper supply is steady in the East, with product still coming in steadily from local growing regions. California has several production areas shipping this week- Gilroy, Fresno, Stockton and the Central Coast, with the best quality coming from the Central Coast farms.

Green Beans: After working through rain skips, Tennessee growers will be back in solid bean volumes this week to meet Eastern demand. However, with heat-related gaps in Watsonville/ Salinas production, volume is limited in the West. Fresno will begin its short Fall season in 7-10 days, which will help. But, we

expect sporadic production from other areas until mid-October.

Cucumbers: Western markets are struggling with cucumber supplies this week. Northwest growers are finishing up for the year, while Baja farms are picking what they can from older fields. Fall acreage is behind schedule and is now expected to begin around September 15th. In the East, Michigan's quality is a concern, which limits supply. Fortunately, North Carolina is kicking off the Fall season this week and should bring better quality to the table.

Eggplant: Stockton and Fresno are now into Fall crops, bringing good availability and quality to the West. Eastern sources (New Jersey, the Carolinas and Michigan) are still shipping light numbers.

Summer Squash: Fall crops have already begun in California growing areas, with more to follow in the next 10-14 days. Overall volumes are expected to be lighter than usual since less acreage has been planted. Quality is nice on zucchini, but scarring is a concern on yellow squash. Eastern growing areas are seeing better volumes as well, with Fall crops and late plantings starting harvests.

Hard Squash: Eastern supplies of hard squash are solid, as growers ramp up for Fall demand. In the West, Fresno is shifting to storage mode, while Stockton is picking steadily. As usual, scarring is a concern on spaghetti but availability is good.

Transportation Facts

*The National Diesel Average continues to decline, and now stands at \$2.51 per gallon, which is \$.05 less than last week's price (\$2.56).

*The average price for a gallon of diesel fuel is \$1.30 lower than the same time last year.

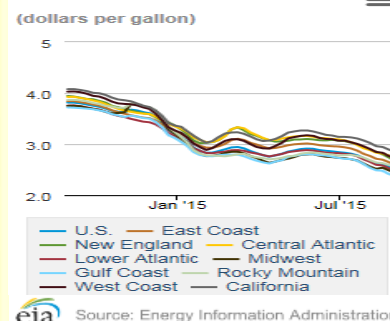
*Fuel prices declined in all areas of the country this week, with the sharpest drop in the Central Atlantic region (-\$.07 per gallon).

*California reports the highest-priced diesel fuel of the week at \$2.85. The cheapest fuel in the nation is in the Gulf Coast area at (\$2.38).

*The WTI Crude Oil Price has increased from our last report, moving from \$42.62 to \$46.25 per barrel.

*Transportation availability is solid throughout the country, with slight surpluses in California and at Mexican crossing points.

On-Highway Diesel Fuel Prices



ON THE HORIZON CONTENTS



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News in the Grocery Trade **MEET THE MODERN FOODIE**

By: Craig Levitt, www.groceryheadquarters.com, September 1, 2015

Sopexa, the global agency for food, beverage and lifestyle marketing, released its 2015 Foodie Study. They have profiled the preferences, behaviors and epicurean influence of modern foodies in the United States and abroad, unveiling key insights that will have a significant impact on food, beverage and retail marketing, whether it relates to everyday shopping or holiday entertainment.

U.S. Key Findings

While the pursuit of great taste remains top of mind for all foodies, they are becoming more demanding and selective, and would rather experiment on their own instead of going to the restaurant. With the aging of millennials, and the digitalization of Gen X, foodies have evolved into housechefs, whose growing decision-making power requires a whole new set of changes in positioning, purchase patterns, and marketing practices.

Foodies are re-owning the kitchen, including cookware and appliances, as they rediscover the pleasure and creativity of home cooking: 75% cook at home several times a week – 93% of those cook daily for themselves and their family as opposed to eating out. They embrace their role and the positive impact they can have on others' happiness and nutrition.

84% of American foodies cook to express their creativity and are increasingly fond of world cuisines, especially Latin flavors. Top five favorite foods are Italian, Mexican, Spanish, French and Chinese.

Foodies are democratizing gastronomy through their extensive use of social media, which they employ more than 7 times a day to quench their thirst for inspiration and admiration.

For seeking ideas and displaying their creativity, foodies unanimously use Facebook (90%) and Instagram (73%), then Pinterest (36%) and Twitter (19%).

Although foodies hunt for new products and recipes online, research shows that they prefer to buy grocery in stores (88%) or directly from local producers (52%). Foodies want to see, touch, smell and feel the product off premise.

"Foodies are no longer food enthusiasts who only know about hot spots. Through our research and analysis, we are seeing that they are more independent, connected and experimental than ever, leveraging their savviness to find, own, and display new products, flavors and cuisines to their online networks," said Pauline Oudin, Managing Director and Digital Lead, Sopexa USA. "Empowered by technology, they have become housechefs, elevating everyday gourmet cooking, with whom brands can engage across the entire purchase funnel," she added.

Recommendations for Marketers

To best leverage these changes in the way foodies find, pick and endorse products, Benjamin Bourinat, Director of Public Relations and Social Media, Sopexa USA, recommends that marketers and retailers take some of the following steps to ensure that their business is ready to engage with the modern foodies:

Become an integral part of the foodies' creative process by developing recognition programs in line with their time spent on searching, shopping, cooking, and bragging.

Amplify messages of origin, exoticism, nutrition and self-improvement. As foodies take their individual role seriously, brand preferences will not be swayed by discounts, contests, or games.

Increase the frequency of mobile touch points across Facebook, Instagram and Pinterest for visual storytelling and greater brand exposure. Remember foodies are either social voyeurs or social exhibitionists; they rarely partake in online conversations unless they feel they are driving them.

Re-examine your influencer strategy. Attention levels are decreasing as foodies are more educated and acknowledged.

Ensure you are getting endorsements that compliment their egos.

Foodies prefer buying in-store than online; provide personalized, sensorial experiences to build a long-lasting emotional connection between foodies and a product or a set of goods necessitated to achieve culinary excellence. For those looking to increase their online sales; emphasize where the product comes from; how it will taste, smell and feel; and how it will improve the foodie's wellbeing in order to make up for the lack of physical encounter.

Restaurants can increase loyalty by making the eating out experience exclusive, inspiring and sharable so the foodie is inclined to recommend your brand.



GETTING TO KNOW YOUR VEGGIES

Interesting Facts About Zucchini!

It's ultra-low in calories.

Zucchini makes the perfect light side dish for a heavy meal: One cup of sliced zucchini has about 19 calories. That's 40 to 50 percent lower than the same serving size for other low-cal green veggies like broccoli and Brussel sprouts. And because it's so versatile, you can enjoy this low-calorie food in so many different recipes, from baked fries to pesto roll-ups. Of course, you can always grill zucchini with herbs for some savory flavor, too.

You can eat the blossoms.

Even though zucchini is served as a vegetable, it's technically a fruit because it comes from a flower: It grows from a golden blossom that blooms under the leaves. Grocery stores don't always sell the blossoms, but you can find them at farmers' markets. And these beauties aren't just for looking at -- you can eat them, too. The most popular way to prepare them is fried or stuffed.

It may be good for your heart.

Zucchini has a good amount of potassium: 295 milligrams per cup, or 8 percent of your recommended daily value. According to the American Heart Association, potassium can help control blood pressure because it lessens the harmful effects of salt on your body. Studies suggest that boosting your potassium intake (while also curbing sodium) can slash your stroke risk and may also lower your odds of developing heart disease. Zucchini is also high in the antioxidant vitamin C, which may help the lining of your blood cells function better, lowering blood pressure and protecting against clogged arteries. One cup of sliced zucchini has 20 milligrams, or about 33 percent of your daily value.

You can substitute it for pasta.

Sure, you can add zucchini to your spaghetti recipes, but you can also use it in place of noodles altogether. So-called "zoodles" are a great pasta alternative, and they're easy to make with the help of some kitchen gadgets. With a mandolin or a spiral slicer, you secure the zucchini on prongs and push the veggie toward the blades. A smaller and less expensive option is a julienne peeler, which has a serrated blade to create thin strips.

It's not always green.

You may be used to seeing a vegetable that's green and speckled, but there's a yellow variety of zucchini, and it's easy to confuse with yellow squash, a different type. The easiest way to tell the difference is to look at the shape. Yellow squash usually has a tapered neck, either crooked or straight, whereas zucchini of any color looks like a cylinder from end to end. Though not much is known about the difference between the varieties, some say golden zucchini has a sweeter flavor than the green kind. Because it retains its color after cooking, it also makes a sunny addition to any dish.

It has an international pedigree.

Italians are thought to have bred modern zucchini from the squash they picked up in colonial America -- zucca is actually the Italian word for squash. That's why you'll see zucchini referred to as "Italian squash" in some recipes. Still, summer squash has been around for quite some time. The crop dates back to 5500 B.C.E. where it was integral in the diets of people living in Central America and South America, according to the University of Arizona Cooperative Extension.

PRODUCE BAROMETER

ITEM	QUALITY	PRICING
Bell Pepper	Good	Steady
Cucumber	Fair to Good	Higher
Eggplant	Good	Steady
Green Beans	Good	Steady
Lettuce-Iceberg	Fair	Steady
Jalapenos	Good	Higher
Onions	Good	Steady
Potatoes	Good	Steady
Squash	Good	Steady
Tomatoes	Good	Steady



September Calendar

All Month

No Kid Hungry Month

September 5th

National Cheese Pizza Day

Franchise Appreciation Day

September 7th

Labor Day

September 9th

National "I Love Food" Day

Hendersonville, NC Weather

Thu Sep 3	Fri Sep 4	Sat Sep 5	Sun Sep 6	Mon Sep 7	Tue Sep 8	Wed Sep 9
84° F	84° F	75° F	77° F	79° F	81° F	81° F
64° F	64° F	64° F	64° F	63° F	63° F	64° F
N 6 MPH	NNE 6 MPH	E 8 MPH	E 6 MPH	E 4 MPH	N 4 MPH	VINW 4 MPH
Precip 20%	Precip 40%	Precip 50%	Precip 40%	Precip 30%	Precip 30%	Precip 30%
Averages 80° F/62° F	Averages 80° F/61° F	Averages 80° F/61° F	Averages 79° F/61° F	Averages 79° F/60° F	Averages 79° F/60° F	Averages 79° F/60° F



Restaurant Industry News

WHY FAST CASUAL'S CUSTOMER EXPERIENCE ISN'T SO CASUAL

By: Kent Barkouras, www.fastcasual.com, August 26, 2015

The industry standard of using a variety of on-the-table printed menus, lobby signage and other marketing materials in chain restaurants has been left behind since fast casual restaurants came along and upgraded the customer experience. These days, the customer experience is about guests getting what they want. That includes customized, fresh, unique food being prepared in front of them. Most of us recall the jingle in the mid 1970s by Burger King, "Hold the pickle, hold the lettuce, special orders don't upset us." Little did we know that Burger King was on to something special.

Fast casuals have moved the branded messaging moved off the table and onto walls and screens, so guests can visualize them at all times. Instead of sitting down and reading a menu and looking at what the food is supposed to look like, the process of selecting what to eat became much easier. All types of menu boards and point-of-purchase displays greet guests prior to placing their order. Online and mobile ordering make the process quick and efficient.

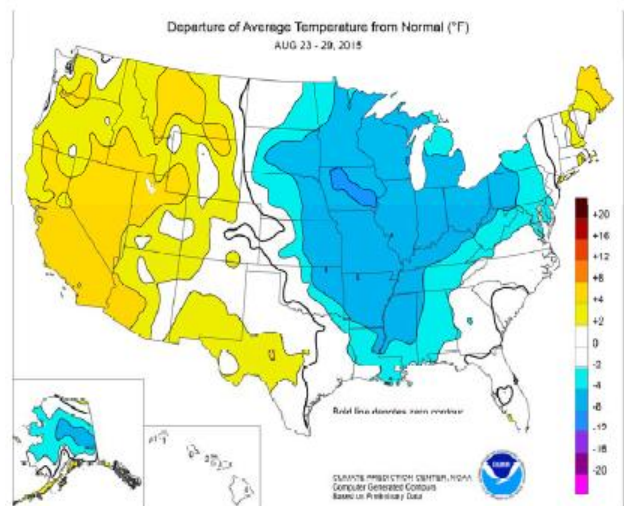
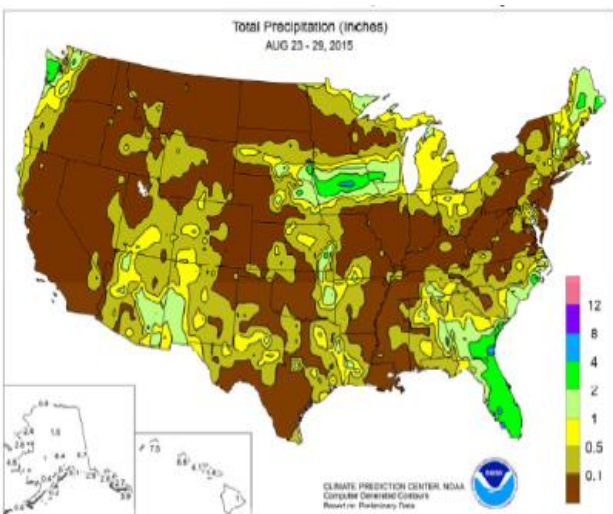
Marketers have realized a meaningful amount of guests' time in the restaurant is on their feet, in line, placing their order, waiting for it to be cooked and in many chains consuming it. Many fast casual chains have built in nicely designed countertops with and without stools. They've also moved their messaging to walls, ceilings, floors, countertops and registers. Whether it's branded wall paper, custom-framed artwork, digital signs, floor graphics, high-quality exterior signage, etc., marketers are using a variety of techniques to communicate their branded messages to capture each guest while they can and give them a comfortable experience.

From digital and flexible menu boards to incredible fabrications of branded décor, lighted signs and other fixtures, the marketing landscape in fast casual is unique. Traditional menus are gone, replaced by new styles and designs of menu boards, front-of-house order slips or even simple brown paper bags with sharpies to check the ingredients for your order. Crayons and kids menus have been replaced by IOS and Android apps. Gift cards are now on guest's mobile devices instead of at the register.

It is becoming very clear that the fast casual mindset is taking over, and the guest experience is better than ever. The large QSR chains have taken notice and are moving quickly to test modified layouts to meet the rising demand of the fast-casual experience. To date, marketers of the fastest- growing chains have done an exceptional job of effective brand messaging while making sure guests' visual experiences measure up with the freshness, speed and tastiness of the food served inside.

NATIONAL WEATHER SPOTLIGHT

Weekly Precipitation and Temperature Deviation





Keep Your Eye on the Consumer LOOK WHO'S SNACKING

www.progressivegrocer.com, August 28, 2015

It's hard to escape all the data about demographics these days, especially when it comes to Millennials and Hispanics. These two consumer groups pack a tremendous amount of buying power. And that means retailers and CPG companies alike must understand how these prospective customers make decisions on the path to purchase for a variety of products—including snacks.

While you might know that snacking, in general, is on the rise (94 percent of adults snack at least once a day, and 33 percent of all consumers say they are snacking on healthier foods this year compared to last year, according to the Snacking Motivations and Attitudes US 2015 report from Mintel), recognizing the snacking habits of each demographic group can help you build a snack portfolio best suited to your customer base.

Meet the Millennials

Young people like to snack—a lot! That is one take-away from the Snacking Motivations report, which shows that iGeneration/Millennials are most likely to snack frequently. “Millennials are significantly more likely to snack compared to older consumers, with 24 percent of Millennials most likely to snack frequently, four or more times per day, and 23 percent snacking more this year compared to last year,” the report shows.

Just what do Millennials look for when shopping for snacks? According to Mintel:

-iGeneration/Millennials are drawn to organic snacks and products with added nutrition, (think protein, vitamins and fiber), and a variety of flavors. “Millennials are also more likely than older generations to indicate that snacks with added nutrition and flavor variety are important to them,” says Amanda Topper, food analyst at Mintel. “As a result they may be drawn to products with high fiber, energizing claims or protein content to stay satiated, as well as to bold flavors to help add variety to their frequent snacking occasions and eliminate boredom.”

-Affordability is important. According to Mintel, this creates an opportunity for health-focused or organic brands to reach Millennials with low-cost snacking options.

-Word of mouth and a store's location influence purchases. iGeneration/Millennials are most likely to try a snack that has been recommended to them (68 percent) and most likely to go out of their way to buy snacks from a specific store (43 percent), the report reveals.

Hone in on Hispanics' Preferences

Acculturation is an important factor driving snack buying decisions in Hispanic households, according to Mintel's "Hispanic Consumers' Snacking Preferences - US - March 2015." “Overall, Hispanics in general trail non-Hispanics in the consumption of most snack categories. However, there are significant differences in consumption among Hispanics depending on their level of acculturation,” explains Juan Ruiz, senior multicultural analyst at Mintel. “Typically, less acculturated Hispanics tend to limit their consumption to categories, types, and brands of snacks that they and their families like. As Hispanics become more acculturated, they tend to get exposure to a greater variety of types and brands of snacks, expanding their list of acceptable snacks to consume depending on the occasion.”

What's important for retailers and CPG companies to know about these consumption trends? Mintel says to focus on these facts:

-Hispanics look for variety. Sixty-five percent of Hispanics purchase at least seven types of snacks for their own consumption in a typical month, while 59 percent buy nine or more different types of snacks for household consumption in a typical month.

-Low prices and brand names have an impact. Price is the main driver for Hispanics' snack purchases. However, they'd rather not sacrifice quality, so they also look for brands that are well-known to them for peace of mind.

- Hispanics place significant importance on what family members, especially children, request. “If they are not on board, snack types and brands gradually surrender their space in the household to others,” Ruiz says. “This is why the brands consumed in Hispanic households tend to change as they become more acculturated.”

As Mintel's “Snacking Motivations and Attitudes” study concludes, “Focusing on the key motivations each generation has for snacking can create opportunities ... to appeal to their specific needs.”

Mark Your Calendar & Pack Your Bags

September 16th-18th, 2015

NEPC Produce, Floral & Foodservice Expo

Chatham Bars Inn

Chatham, MA

www.newenglandproducecouncil.com/expo



October 18th-20th, 2015

Fast Casual Executive Summit

Mandarin Oriental

Miami, FL

www.fastcasualsummit.com

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Contact : joanna.hazel@lipmanproduce.com