



## Division of Marketing and Development

Subject: Mexico's Ag-Exports Impacts on Florida Agriculture

August 27, 2021V6

March 18, 2020V5, January 16, 2019V4, October 25, 2018V3, June 23, 2017; V2-Updated, March 15, 2017; V1-Original

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Border crossings often cited in USDA Movement data and FDACS graphics



## Directive and Guidelines (National Trade Policy Agenda Objectives Highlights)

“Examine the historical changes of Florida agricultural production that may have been adversely impacted by Mexican fresh ag-exports from 2000-2021. Determine if any acts, policies or practices have burdened and/or restricted Florida commerce. Determine if there are signs of any reduced, stunted or negatively impaired Florida sales, pricing, distorted pricing positions, hampered growth, profitability and/or market share losses since the North American Free Trade Agreement (NAFTA) was implemented. Establish baseline data positions as the United States-Mexico-Canada Free Trade Agreement (USMCA) is implemented for future analysis.

With an emphasis on 2000-2021, focus on findings, trends and/or practices which distort markets, undermine U.S. (Florida) competitiveness; identify these instances and negative market conditions impacts, with a special emphasis on the last 3-5 years, that appear pertinent. Furthermore, where possible, isolate and estimate any negative impacts, unreasonable acts, policies and/or factors associated with Mexican agricultural exports to the United States (Florida) which appear particularly injurious and/or harmful to Florida Agriculture’s specialty product sector.”

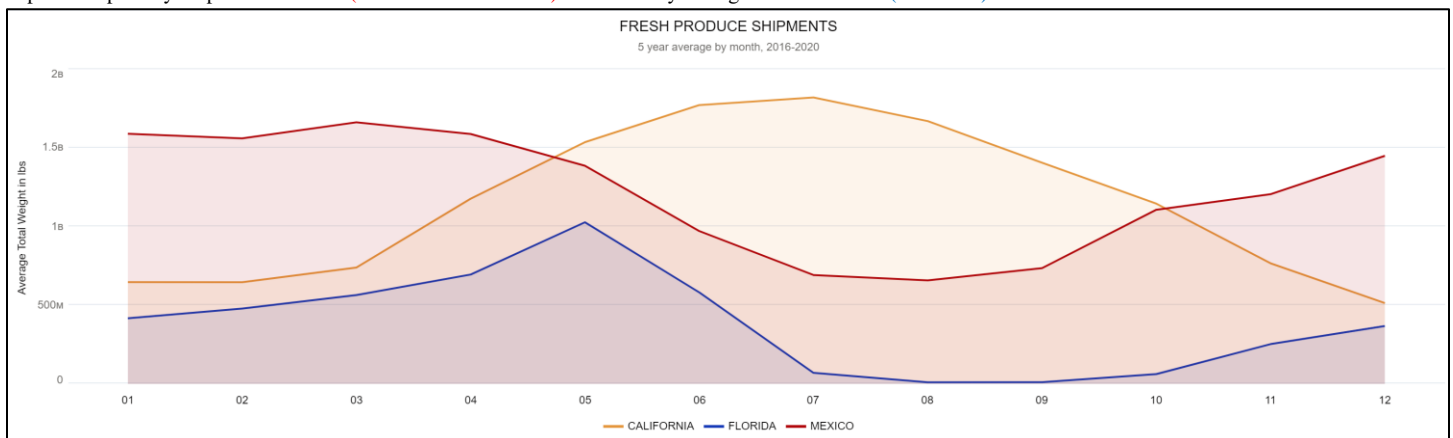
Nandkumar Divate  
Chief, Bureau of Strategic Development, FDACS



### Data Sources include:

- USDA AMS Market News; Movement and Shipping Point Data sets
- FDACS DIVISION OF MARKETING ANALYTICS
- FDACS HISTORICAL RESEARCH AND SUPPLEMENTALS
- USMCA
- U.S. Census Bureau; USATRADE database
- U.S.D.A. NASS/FASS
- USDA ERS
- GOOGLE MAP

Imports of specialty crops from Mexico (Chart Below-Red Line) occur heavily during Florida’s season (Blue Line).



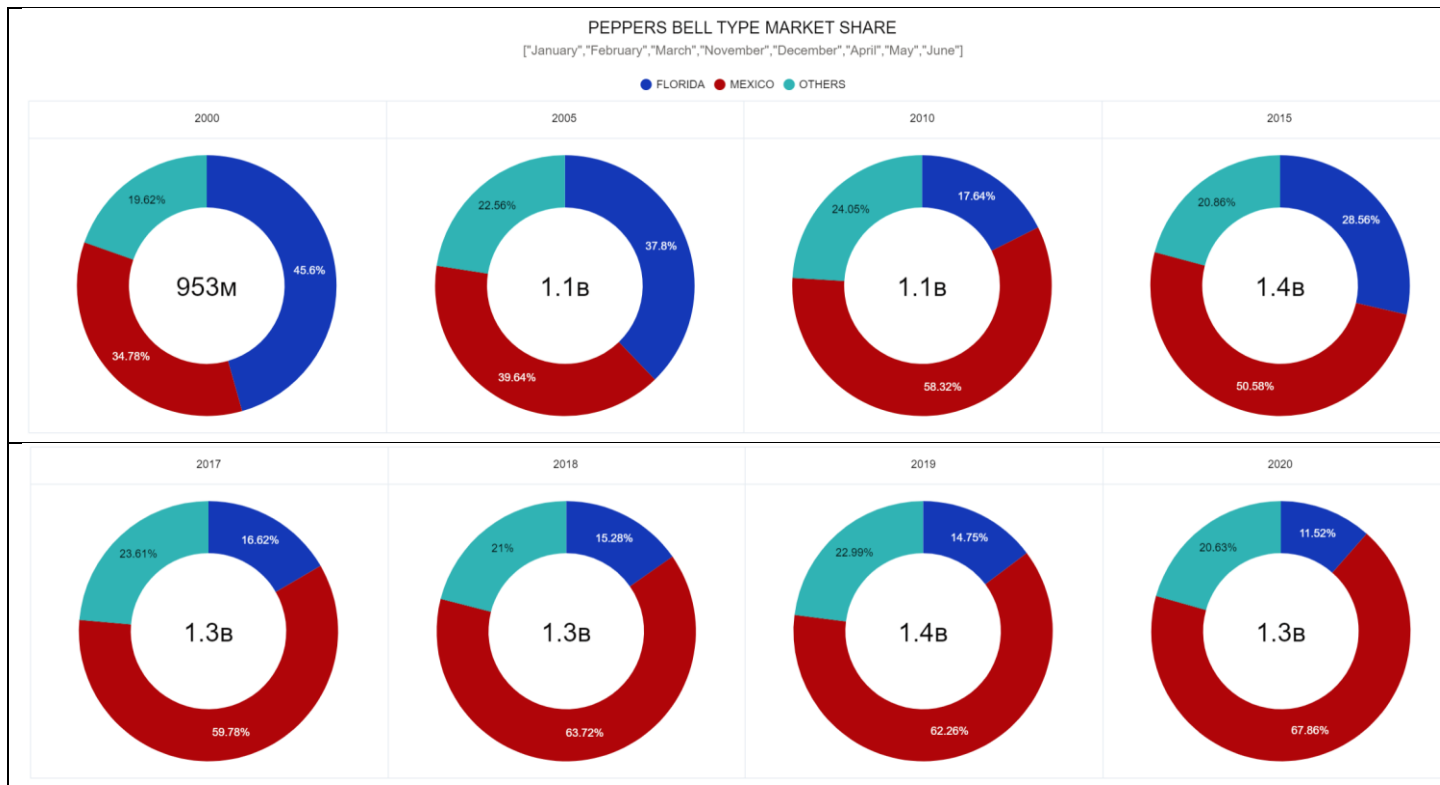
## EXECUTIVE SUMMARY

Florida and Mexico produce a wide array of similar agricultural products during much of the year, when most domestic U.S. producers are dormant. This report demonstrates that Florida producers continue to suffer a disproportionate economic injury. Florida values of production for 2020-2021 are included where available at the time of writing.

- Annually, Florida agricultural producers lost sales estimated at **10-20%** or **\$1.31 – 2.63 billion** because of Mexico's ag-export expansion.
- \$1.31 - \$2.63 billion in total economic losses annually for Florida's economy which equates to **17,870 - 35,741 Florida jobs lost**.
- \$1.31 - \$2.63 billion in total economic losses annually for Florida's economy which equates to **\$44.3 - \$88.5 million in lost indirect tax revenues for Florida**.
- \$1.31 - \$2.63 billion in total economic losses annually for Florida's economy has an impact of **\$1.99 - \$3.99 billion to Florida's economy overall**.
- Between 2000-2020, **580%** increase of specialty crop imports from Mexico.
- **\$23.3 billion** gap currently exists between Mexican ag-exports and Florida's total ag value.
- Over the last 5 years, the value of all commodities imported from Mexico grew by **66.95%** between 2015 – 2020 (**\$22.9 - \$34.2Bn**). For specialty crops, the value of imports from Mexico grew **34.2%** in the last 5 years (**\$10.47 – 15.71Bn**).
- Florida's farmers have **80-92% domestic market share** for many specialty crop commodities during **November to April growing season**. Any unfair competitive disadvantages during this period disproportionately affects Florida.
- Florida's market share (volume) declined in each of the four primary commodities examined between 2000 - 2020:
  - **Bell Peppers** - Florida lost **74.75%** Market Share between 2000 and 2020 from November – June. Mexico gained **95%** Market Share during that same time frame. The change in total U.S. supply between 2000 and 2020 is **385** million pounds, an expansion of **40%**.
  - **Tomatoes, Rounds** - Florida lost **52.1%** Market Share between 2000 and 2020 from November – June. Mexico gained **102.3%** Market Share during that same time frame. The change in total U.S. supply between 2000 and 2020 is **348** million pounds, a decline of **18.4%**.
  - **Strawberries** - Florida lost **30.3%** Market Share between 2000 and 2020 from November – March. Mexico gained **266%** Market Share during that same time frame. The change in total U.S. supply between 2000 and 2020 is **443** million pounds, an expansion of **151%**.
  - **Blueberries** - Florida lost **57.86%** Market Share between 2000 and 2020 from November – March. Mexico gained **266%** Market Share between 2010 and 2020 during those same months. The change in total U.S. supply between 2000 and 2020 is **134** million pounds, an expansion of **2,108%**.
- Florida and Mexico approximate U.S. domestic share of market comparing **2005 to 2020**:
  - **-36%** Florida
  - **+112%** Mexico

## OUR COMPETITIVE ENVIRONMENT: ANALYTICS AND MARKET SHARE

The following six pages utilizes analytics to examine where the weight of Mexican competition falls as it relates to Florida production in six (6) commodity areas focused on in this study; bell peppers, fresh tomatoes, strawberries, blueberries, sweet corn, and watermelon. Additionally, researchers explored the changes occurring over the last two (2) decades as they relate to market share positions between Florida and Mexico and any notable differentials in the last 3 years.



**-74.75%**

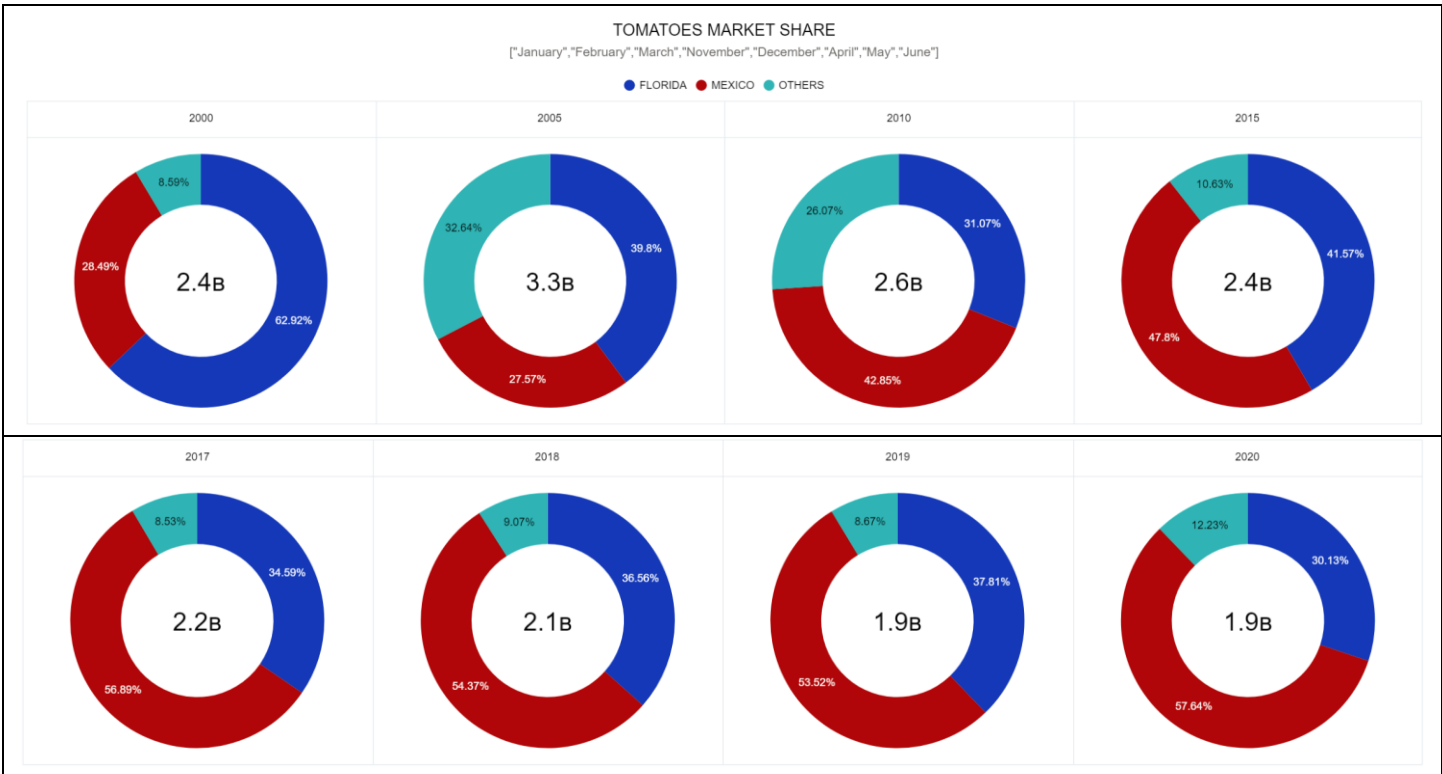
**Loss of Florida Market Share between 2000 and 2020**

**+95%**

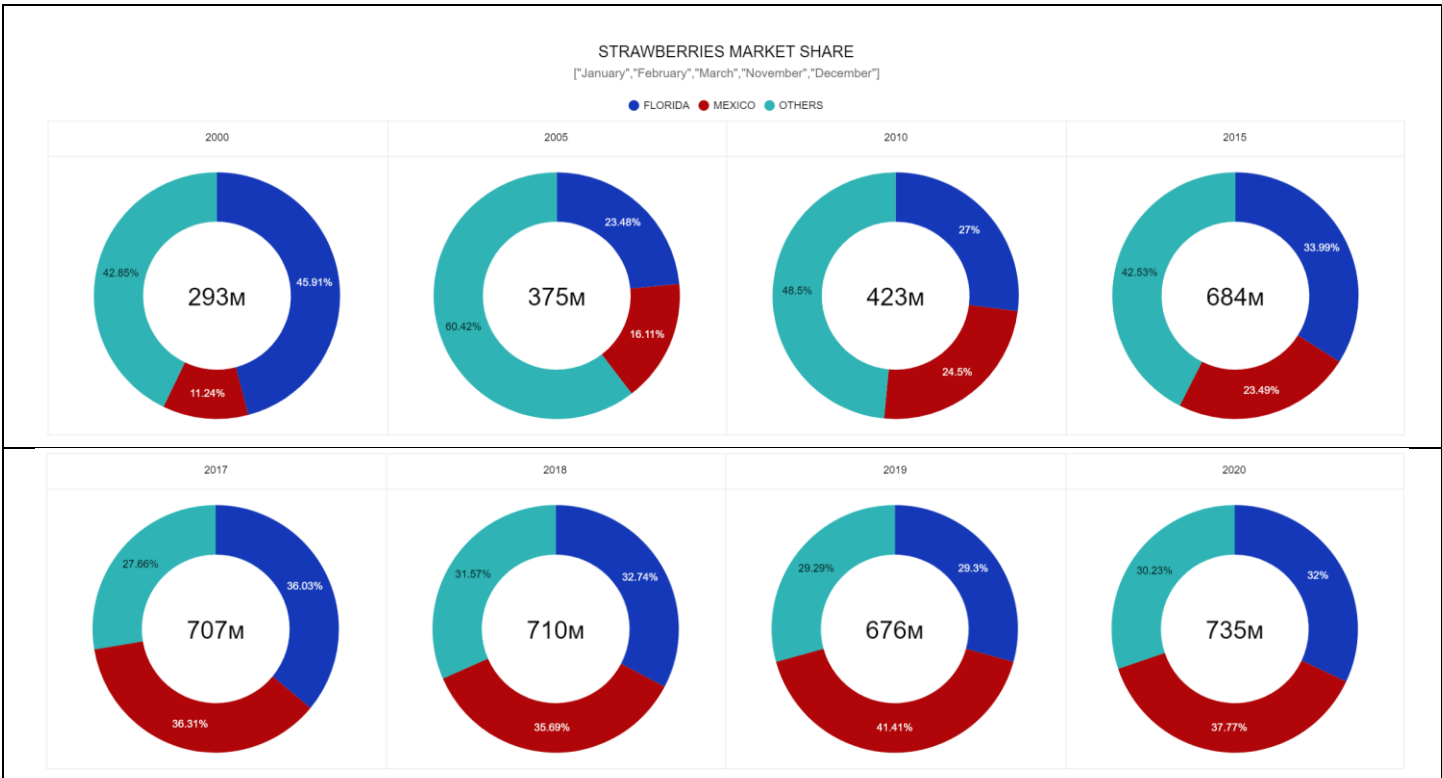
**Mexico's increase in Market Share in the U.S. between 2000 and 2020**

**+40.4%**

**Change in total U.S. supply between 2000 and 2020 is 385 million pounds**



- 52.1%**      **Loss of Florida Market Share between 2000 and 2020**
- +102.3%**    **Mexico's increase in Market Share in the U.S. between 2000 and 2020**
- 18.4%**      **Change in total U.S. supply between 2000 and 2020 is down 348 million pounds**



**-30.30%**

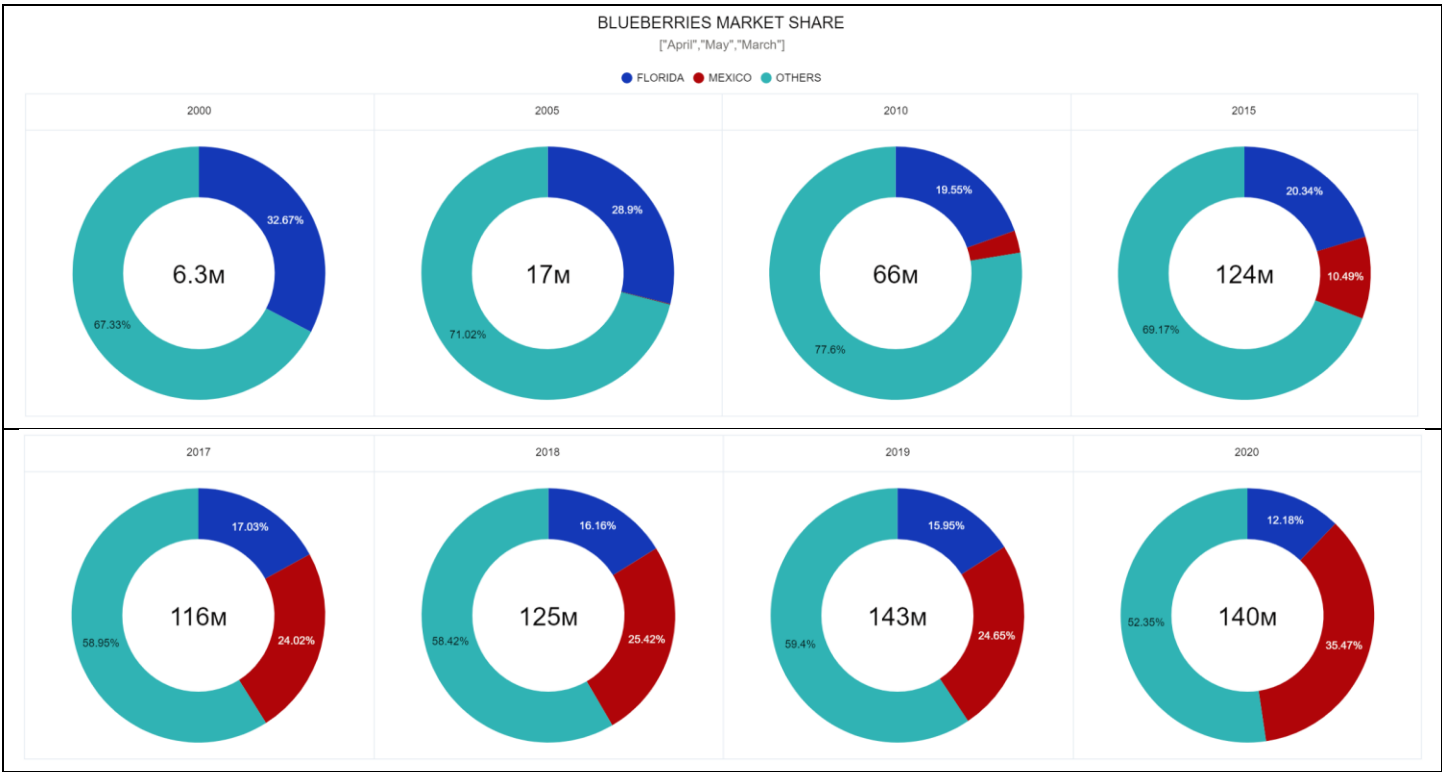
**Loss of Florida Market Share between 2000 and 2020**

**+266%**

**Mexico's increase in Market Share in the U.S. between 2000 and 2020**

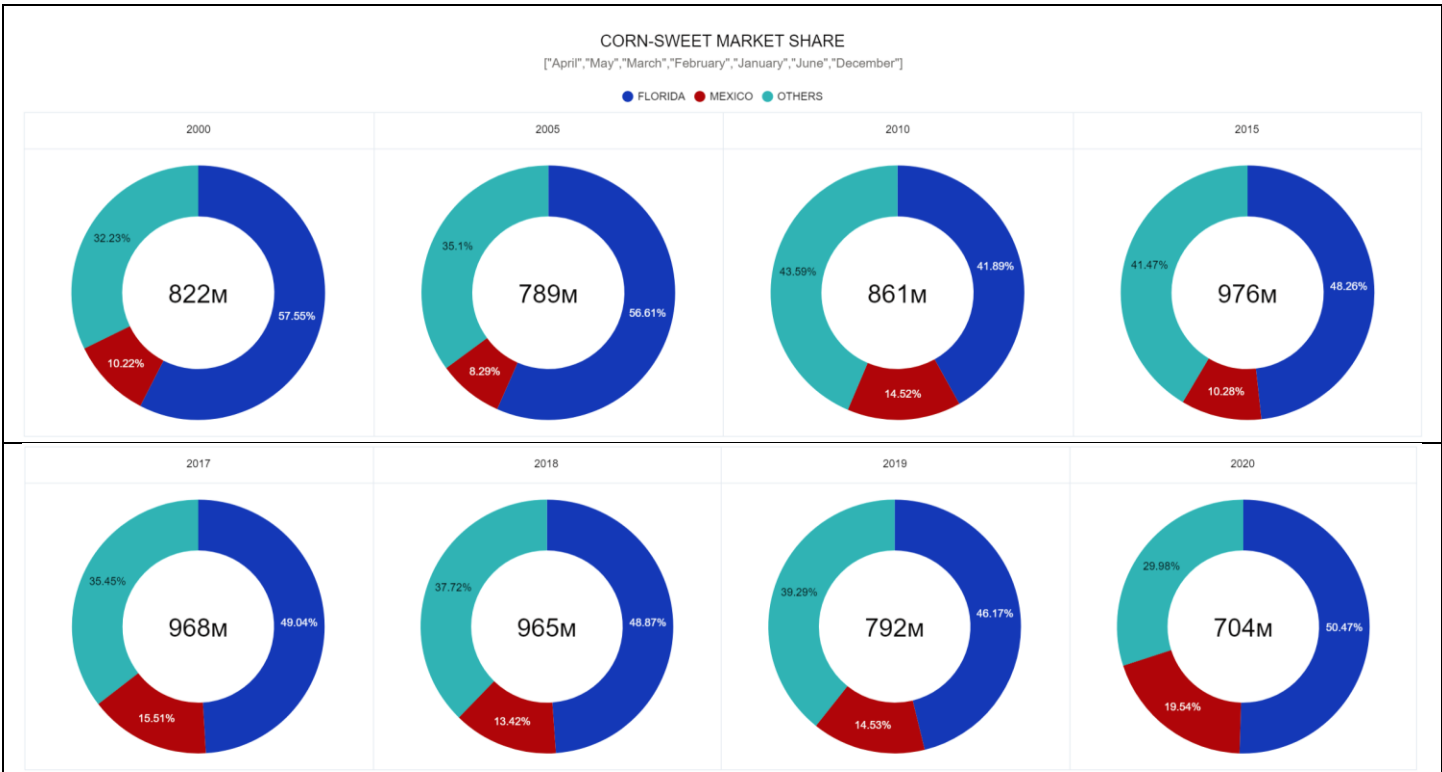
**+151%**

**Change in total U.S. supply between 2000 and 2020 is 443 million pounds**

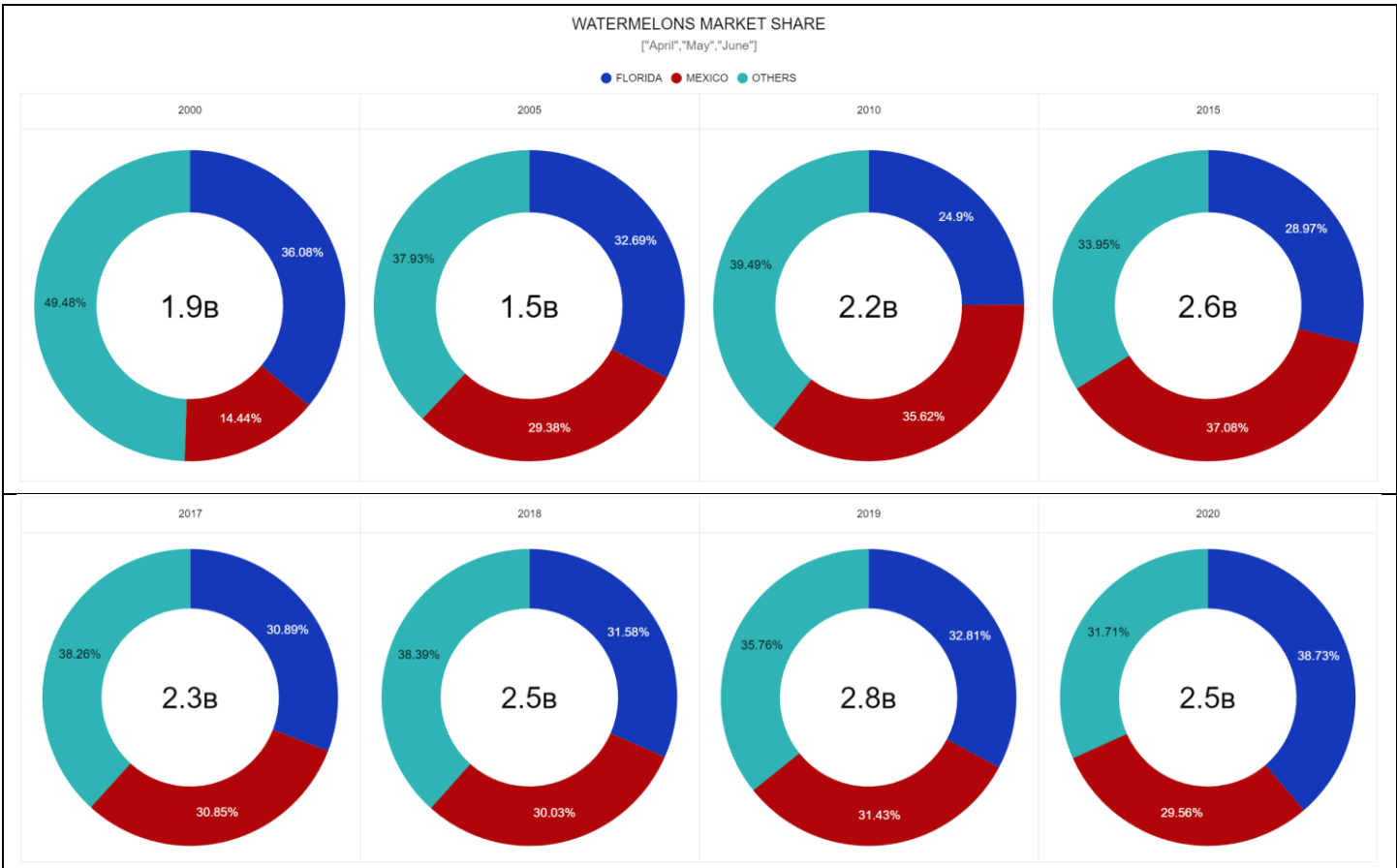


- 57.86%**      **Loss of Florida Market Share between 2000 and 2020**
- +1,145%**      **Mexico's increase in Market Share in the U.S. between 2010 and 2020**
- +2,108%**      **Change in total U.S. supply between 2000 and 2020 is 134 million pounds**
- Noteworthy**      **Within 10 years of entering the market in 2009, MX expanded from 1.35%MS to 28.5%, 2,100% increase**



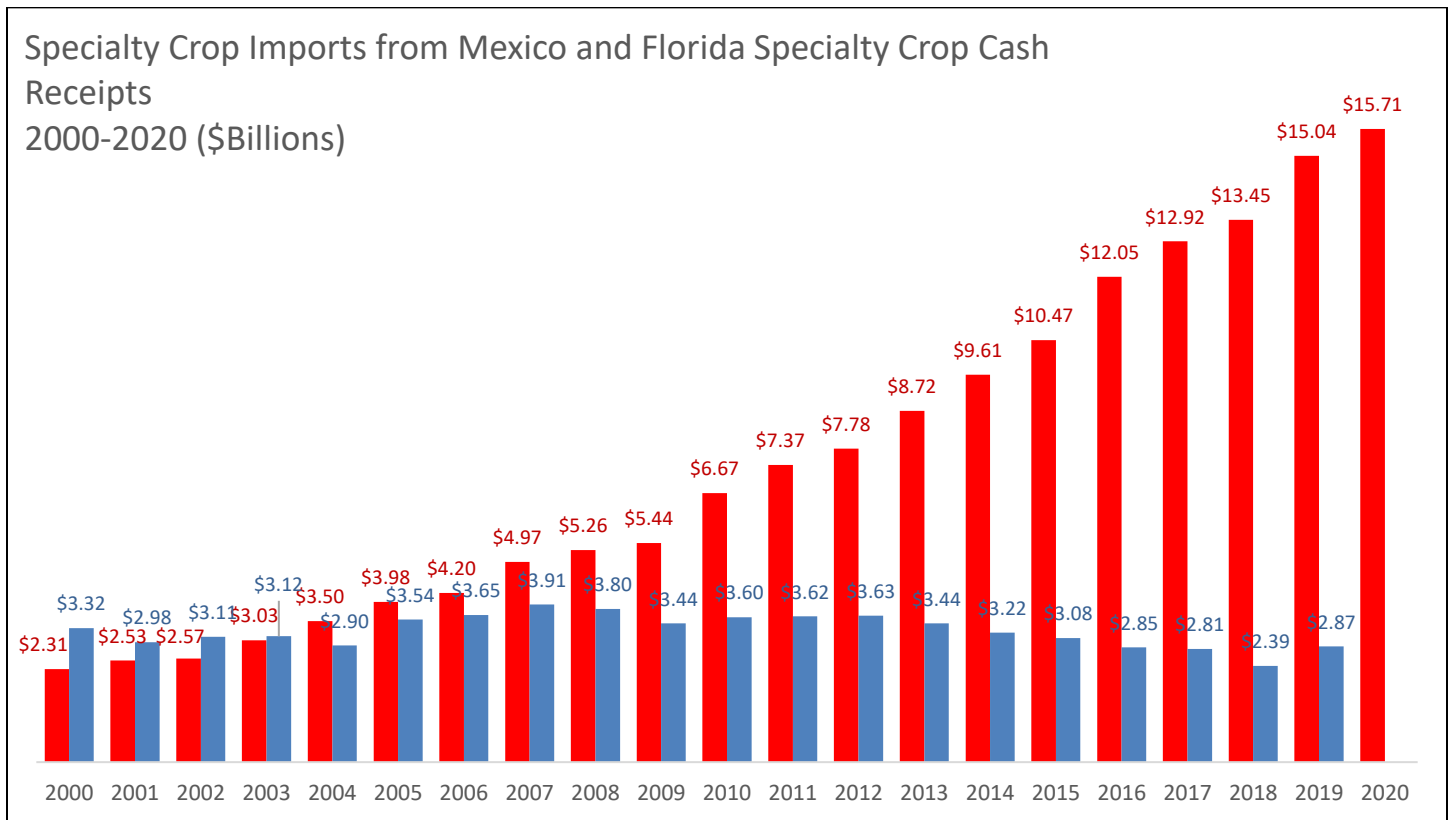


- 12.29%**      **Loss of Florida Market Share between 2000 and 2020**
- +91.2%**      **Mexico's increase in Market Share in the U.S. between 2000 and 2020**
- 14.36%**      **Change in total U.S. supply between 2000 and 2020 is down 118 million pounds**



- +7.33%**      **Gain of Florida Market Share between 2000 and 2020**
- +104.7%**      **Mexico's increase in Market Share in the U.S. between 2000 and 2020**
- +31.1%**      **Change in total U.S. supply between 2000 and 2020 is up 588 million pounds**

## Mexico's Agricultural Export Expansion to the U.S.

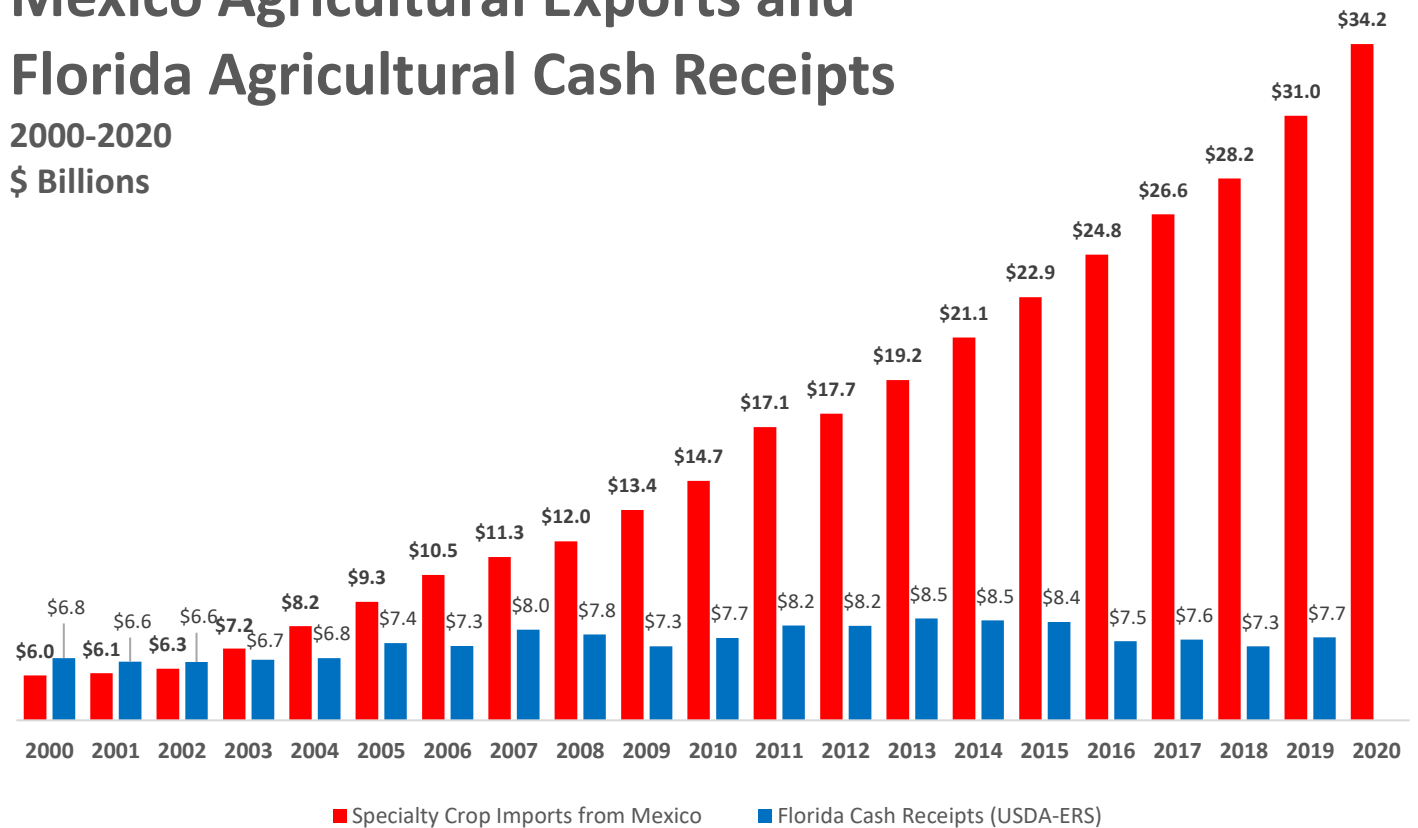


- 1999: Five years after the signing of NAFTA, Florida specialty crop production value was 44% higher than the value of specialty crop imports from Mexico.
- 2004: Five years later, the value of imported specialty crops from Mexico was 21% higher than the value of production for Florida specialty crops.
- 2014: A decade later, the value of specialty crop imports from Mexico was 198% higher than the value of production for Florida specialty crops.
- 2000-2020: 580% increase in value of Mexican ag imports from 2000-2020 (\$2.3 - \$15.71Bn).
- 2015-2020: The value of imports from Mexico grew 34.2% between 2015-2020 (\$10.47 – 15.71Bn).
- \$12.2 billion: Gap between value of imported specialty crops from Mexico and Florida specialty crop value of production in 2019.

# Mexico Agricultural Exports and Florida Agricultural Cash Receipts

2000-2020

\$ Billions



2000:

Six years after the signing of NAFTA, Florida’s value of production for the selected commodities was 25% higher than the value of products imported from Mexico.

2003:

Three years later, the value of imports from Mexico was 22% higher than the Florida value of production for the selected commodities.

2011:

The value of imports from Mexico was more than double the Florida value of production for the selected commodities in 2011.

2000-2020:

470% increase in the value of imports from Mexico for all agricultural commodities (\$6.0 - \$34.2Bn).

2015-2020:

Value of all commodities imported from Mexico grew by 66.95% between 2015 – 2020 (\$22.9 - \$34.2Bn).

\$23.3 billion

Gap between value of all agricultural commodities imported from Mexico and Florida value of production for the same commodities in 2019.

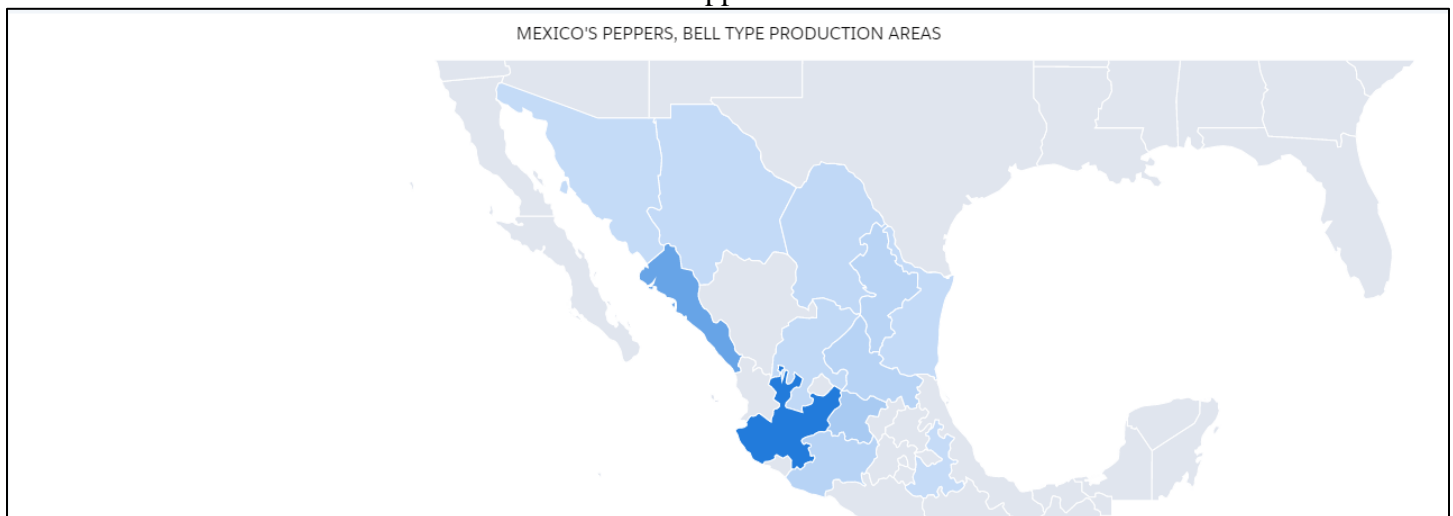
# Mexico's Production Areas



1: Map of specialty crop production areas in Mexico based on research done by University of California, Davis (<https://migration.ucdavis.edu/farm-labor/blog/2018/05/03/mexican-fruit-vegetable-exports-farm-labor/>)

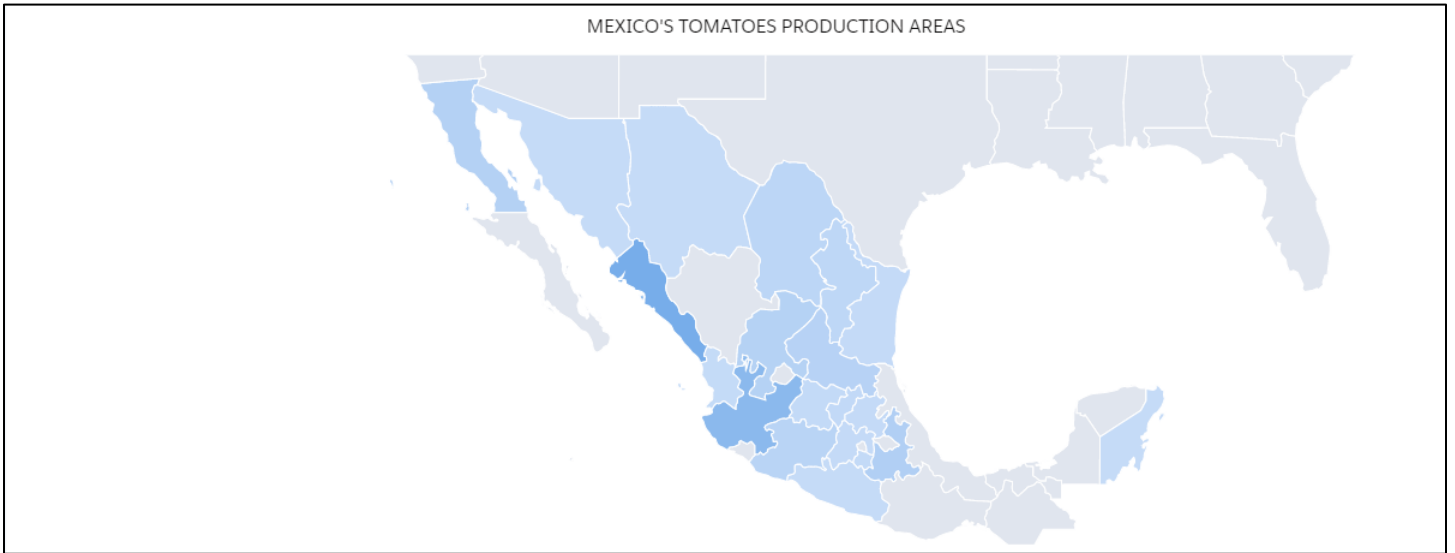
The following charts were constructed from USDA Market News data on terminal market prices. Shading corresponds to the number of times prices were reported for products from the shaded region, and not necessarily the volume of shipments.

## Peppers



1: Peppers most frequently were attributed to the states of Jalisco and Sinaloa, but many other regions produce as well.

## Tomatoes



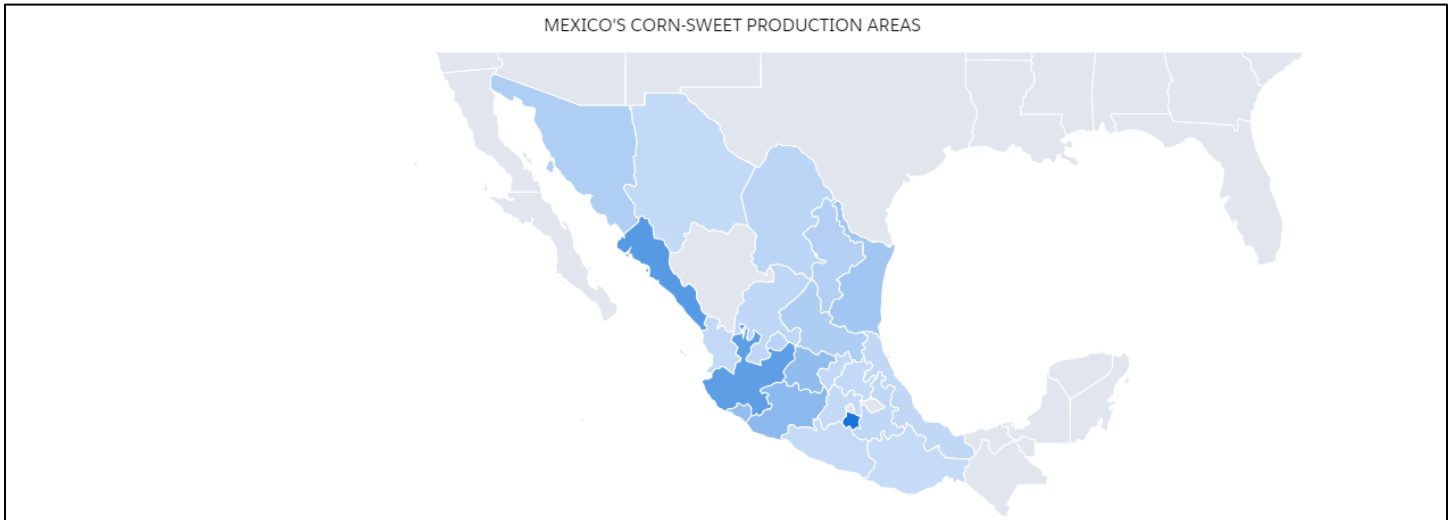
2: Tomatoes were most frequently attributed to Jalisco and Sinaloa as well, but appear more evenly spread between states than peppers.

## Strawberries



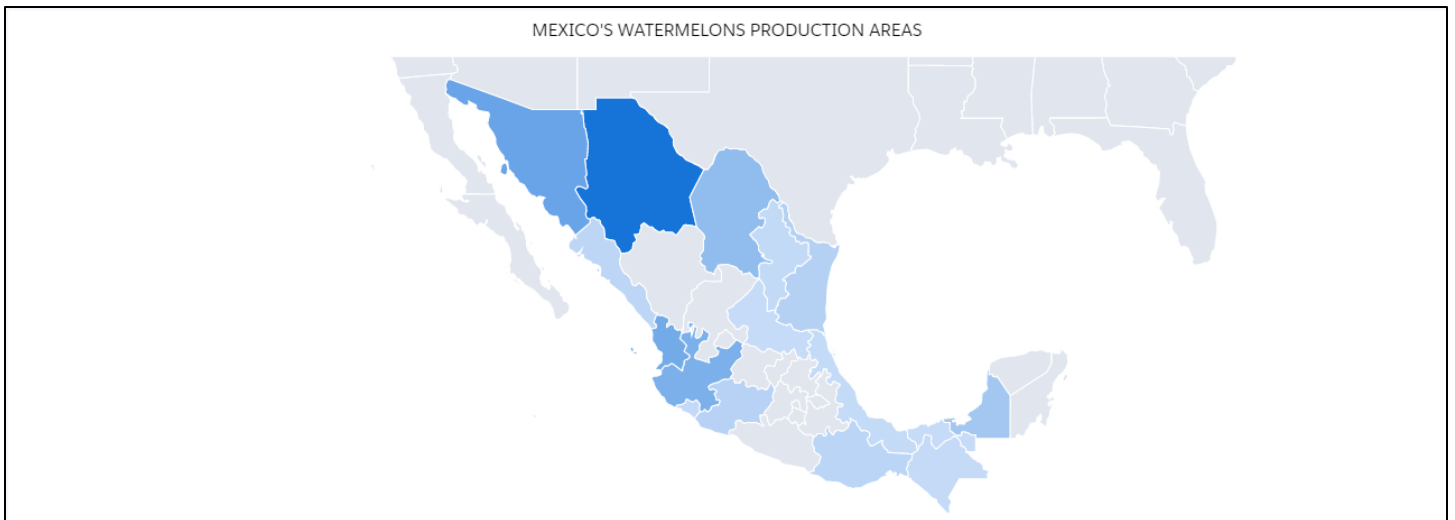
3: Michoacan appeared most frequently as the source of Mexican strawberries in terminal markets. Other origins included Baja California, Guanajuato, and Aguascalientes.

## Sweet Corn



4: Sweet corn imports were spread among a large number of states. The three which appeared most often were Morelos, Jalisco, and Sinaloa.

## Watermelon

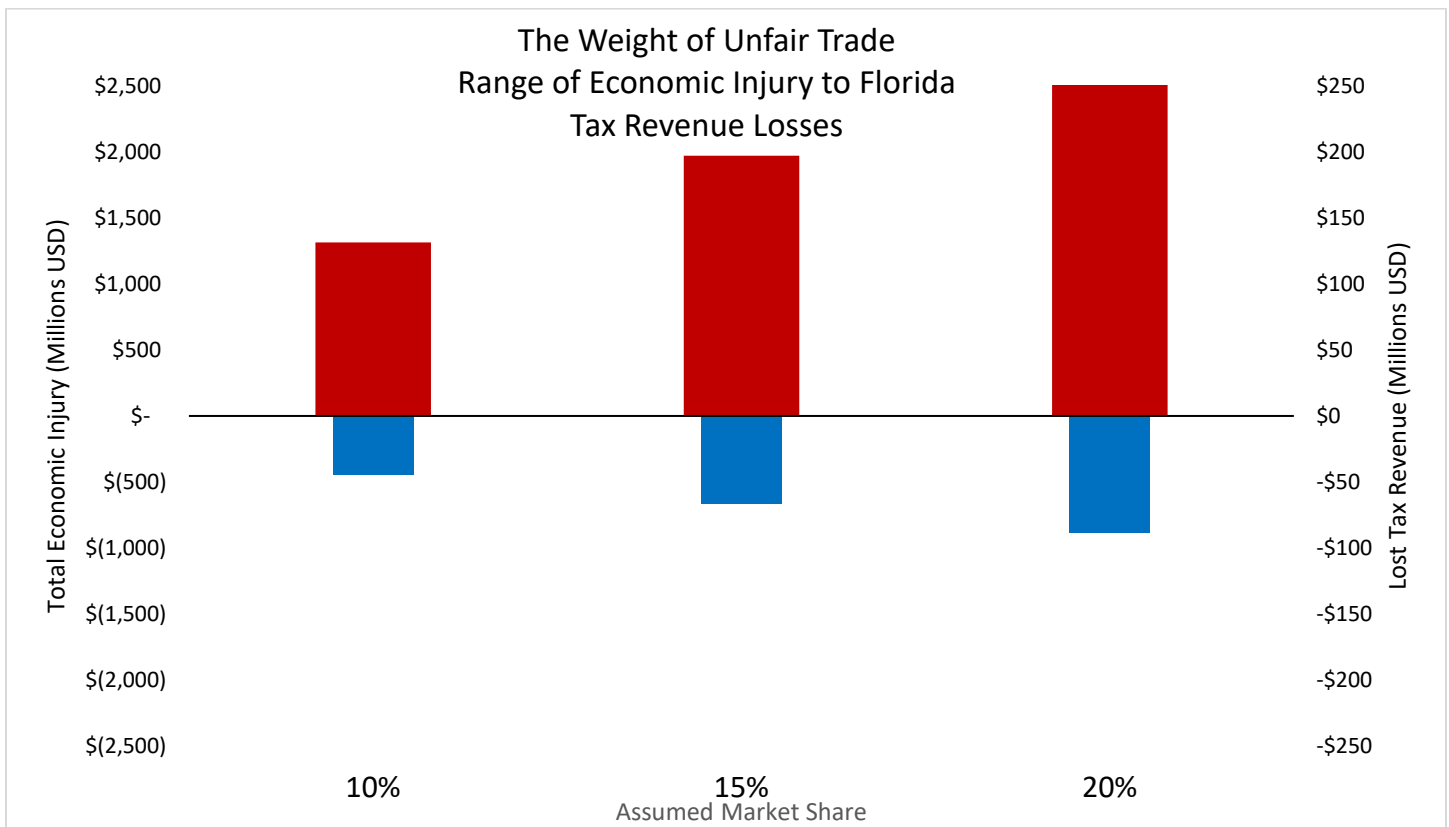


2: Watermelon imports were most frequently attributed to the northernmost states: Sonora, Chihuahua, and Coahuila.

## Florida’s estimated employment losses to our agricultural sector

A substantial portion of Florida and Mexico’s ag-production and exports is categorized as specialty crops; berries, fruits, vegetables and citrus as well as other items. Conservatively, a proportion, ranging from 10-20%, of the \$13.14 billion gap between Florida specialty crop value and the value of specialty crop imports from Mexico could have been added to Florida specialty crop cash receipts. This amounts to a loss of agricultural cash receipts of between \$1.3 and \$2.6 billion annually to Florida.

- 10-20%: Conservative range of the percentage of annually sustained lost sales from the \$13.14 billion gap between Mexico’s specialty crop exports to the U.S. and Florida’s current specialty crop cash receipts.
- \$1.3-2.6Bn: Annual loss of Florida cash receipts to multiple agricultural sectors producing an assortment of specialty crops throughout the state.
- 17,870-35,741: Annual range of the total job losses in Florida ag based upon direct, indirect, and induced employment injuries from the loss of proportional estimates of unrealized agricultural sales.
- \$1.99-3.99Bn: Annual total economic effects injury to Florida’s economy based upon direct, indirect, and induced impacts from the loss of unrealized agricultural sales.



FDACS regularly communicates cash receipts values or value of production in terms of jobs supported, indirect tax revenue, and overall economic impact to stress the importance of the Florida agriculture industry to the state’s economy. These estimates are simple transformations of the value of production using multipliers derived from the University of Florida’s annual study on economic contributions of agriculture and related industries to Florida’s state economy.

\$1 million in additional cash receipts for Florida growers supports 13.6 jobs in the state, generates \$33,688 in additional tax revenue, and contributes \$1.5187 million in overall positive effects on the state economy.



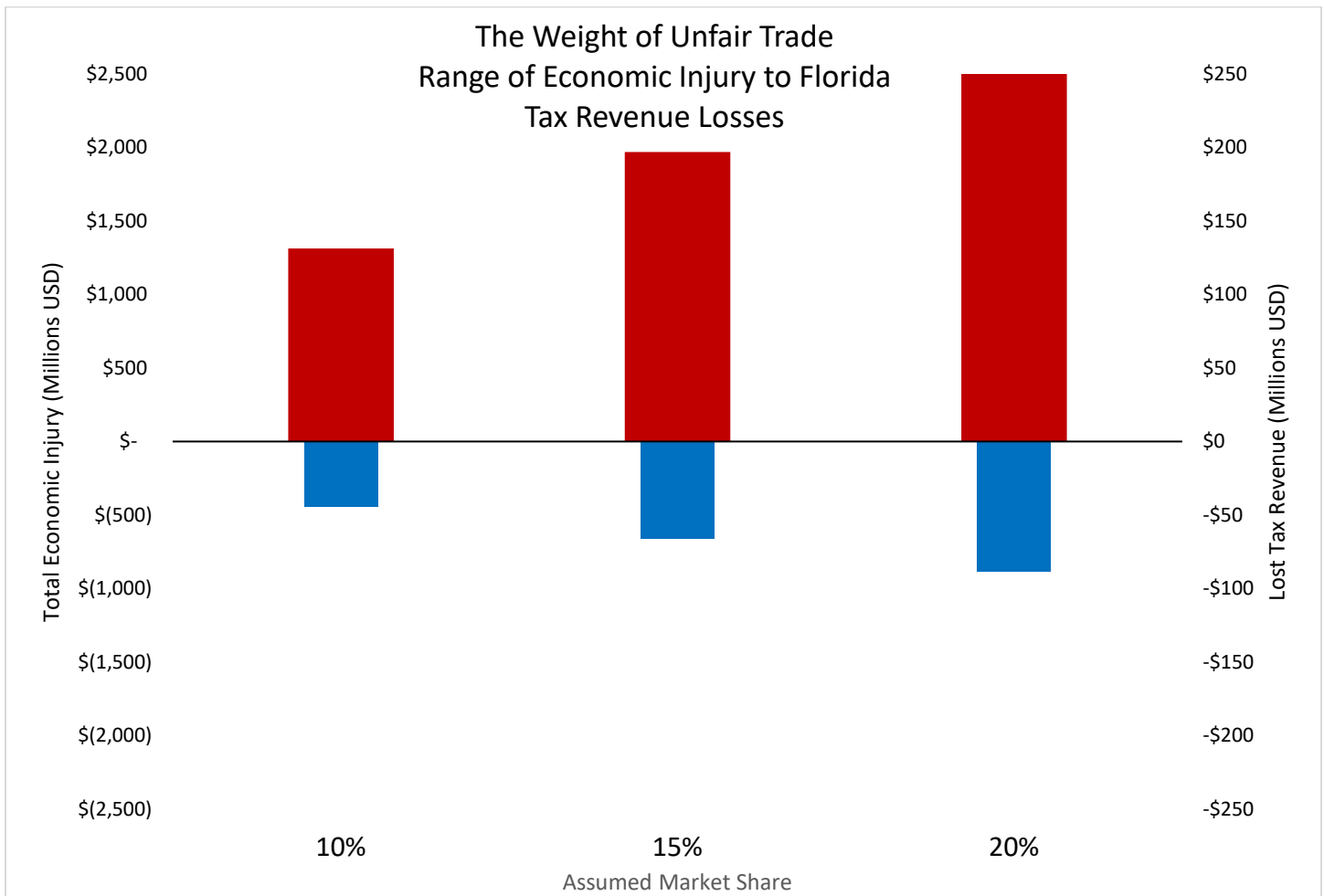
## Florida’s estimated lost agricultural sales and associated indirect tax revenue losses

A secondary injury occurs to Florida’s state, county, and local governments as millions of dollars are lost from the sales revenues in the form of unrealized indirect tax revenues. Most of these injuries will be focused in 20 or so of the state’s 67 counties, however, literally every county has some amount of specialty crop production. This amounts to a loss of agricultural indirect tax revenue receipts of between \$44.3-\$88.5 million annually to Florida.

10-20%: Conservative range of the percentage of lost indirect sales revenues from the \$1.3-\$2.6 billion which would have naturally evolved as part of the total annual Florida specialty crop cash receipts.

\$1.3-\$2.6Bn: Annual loss of Florida cash receipts to multiple agricultural sectors which produce an assortment of specialty crops throughout the state.

\$44.3-88.5Mn: Annual range of the total indirect tax revenue losses in Florida ag based upon injuries from the loss of unrealized agricultural sales.



FDACS regularly communicates cash receipts values or value of production in terms of jobs supported, indirect tax revenue, and overall economic impact to stress the importance of the Florida agriculture industry to the state’s economy. These estimates are simple transformations of the value of production using multipliers derived from the University of Florida’s annual study on economic contributions of agriculture and related industries to Florida’s state economy. \$1 million in additional cash receipts for Florida growers supports 13.6 jobs in the state, generates \$33,688 in additional tax revenue, and contributes \$1.5187 million in overall positive effects on the state economy.

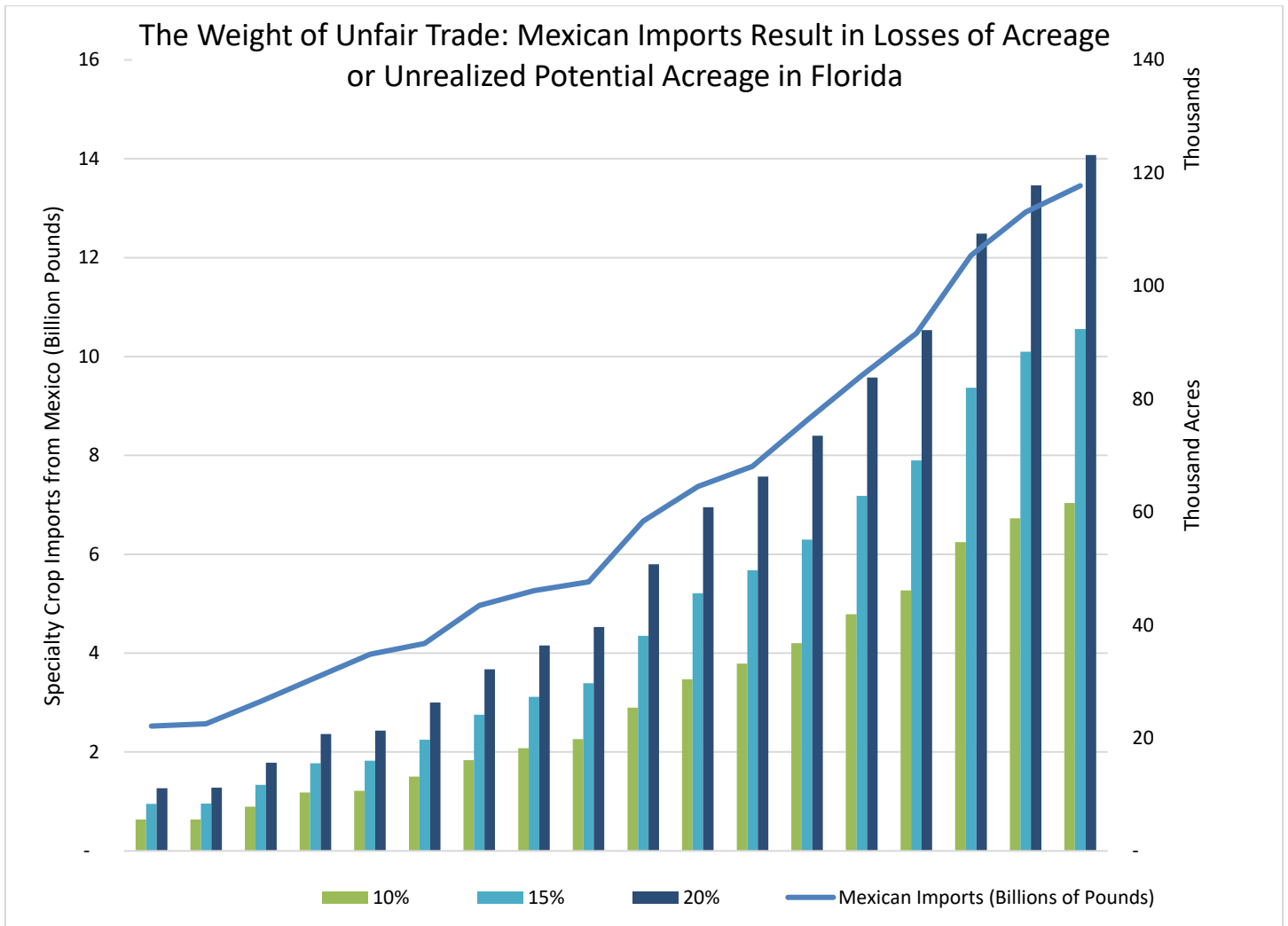
## Florida's estimated lost farming acreage

A long term and potentially irreversible loss and injury occurs to Florida's state, county, and local governments over time as agricultural land that could have been retained, developed, or added to the existing agricultural sector is lost. These injuries occur from the artificial underutilization of farming acreage that Florida farmers would have naturally engaged in adding as specialty product demand increased. Of the 737,000 specialty crop acres throughout Florida between 62,000 and 123,000 extra acres would be required to meet the 10-20% demand.

10-20%: Conservative range of the percentage of lost indirect sales revenues from the \$1.1-\$2.2 billion which would have naturally evolved as part of the total annual Florida specialty crop cash receipts.

\$1.1-2.2Bn: Annual loss of Florida cash receipts to multiple agricultural sectors which produce an assortment of specialty crops throughout the state.

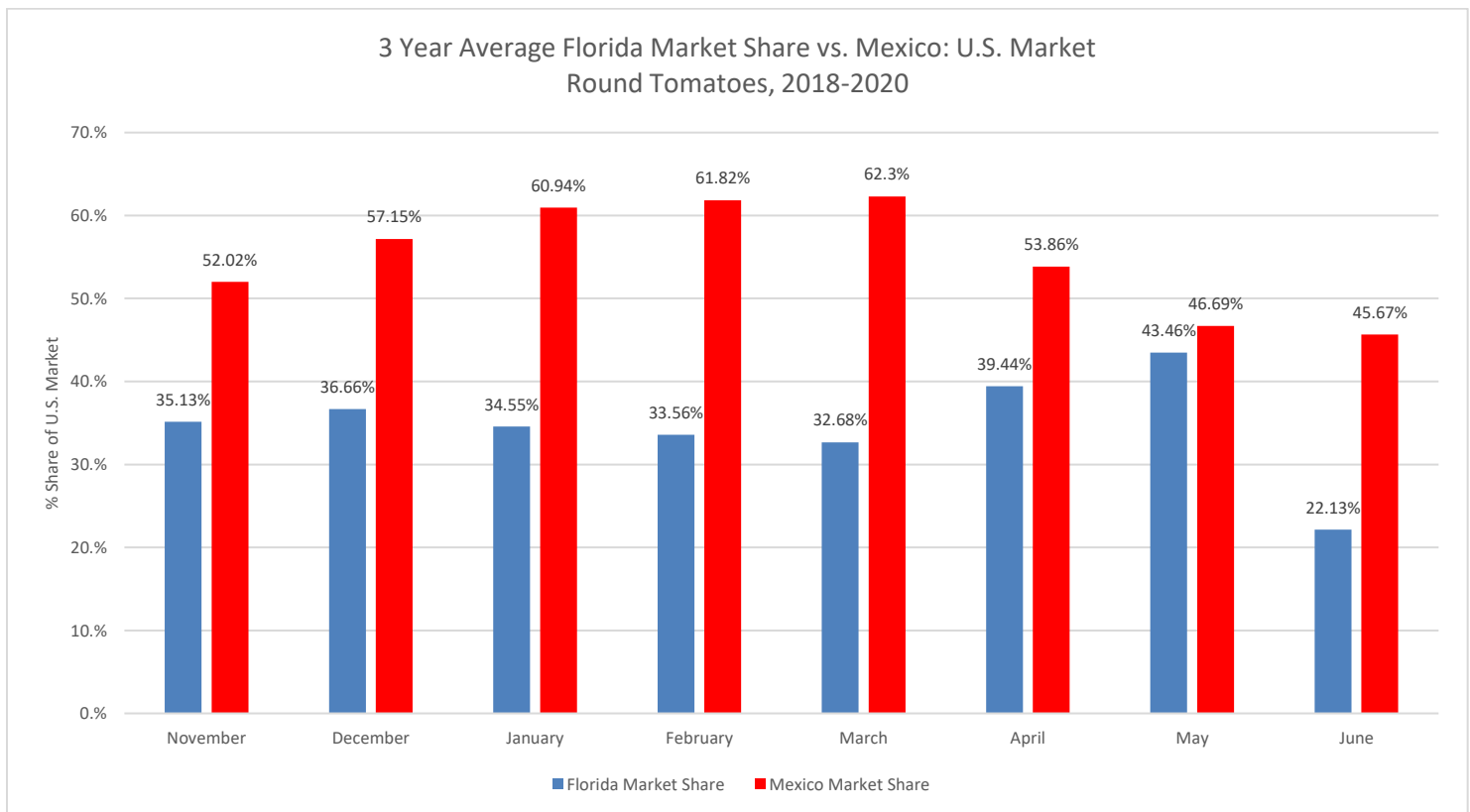
62-123k: Range of required Florida acreage needed to produce 10-20% of the difference in weight between specialty crop imports from Mexico and Florida specialty crop production.



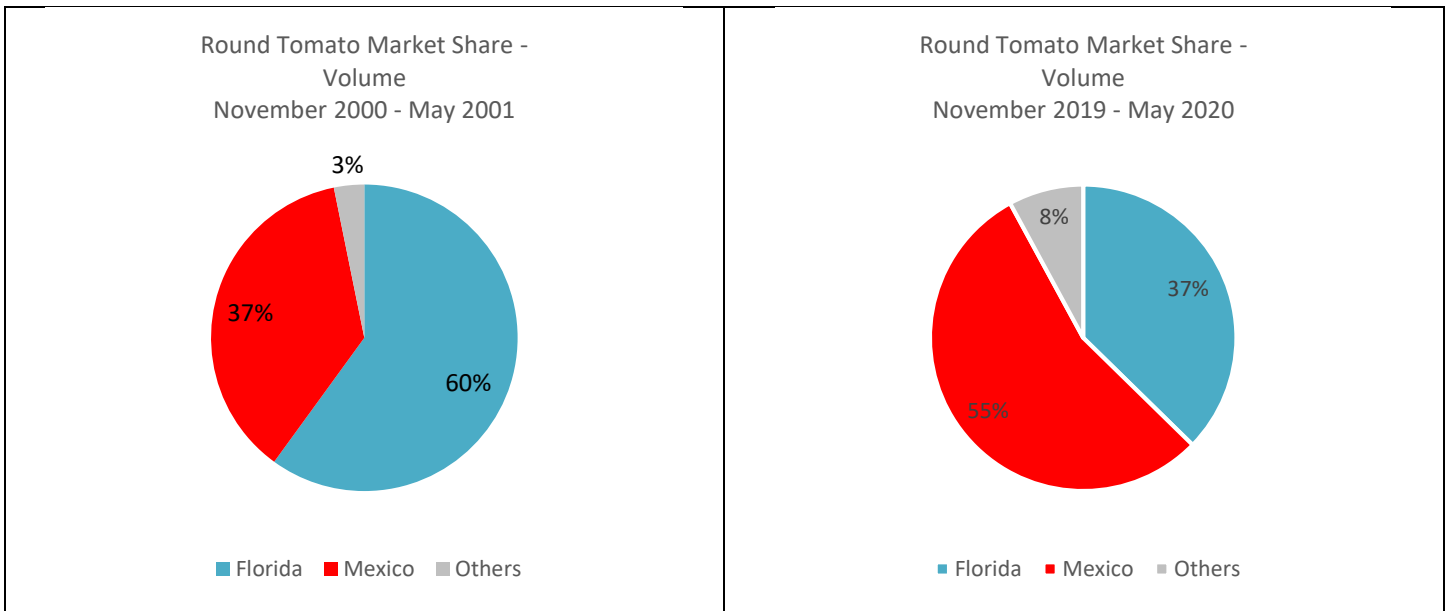
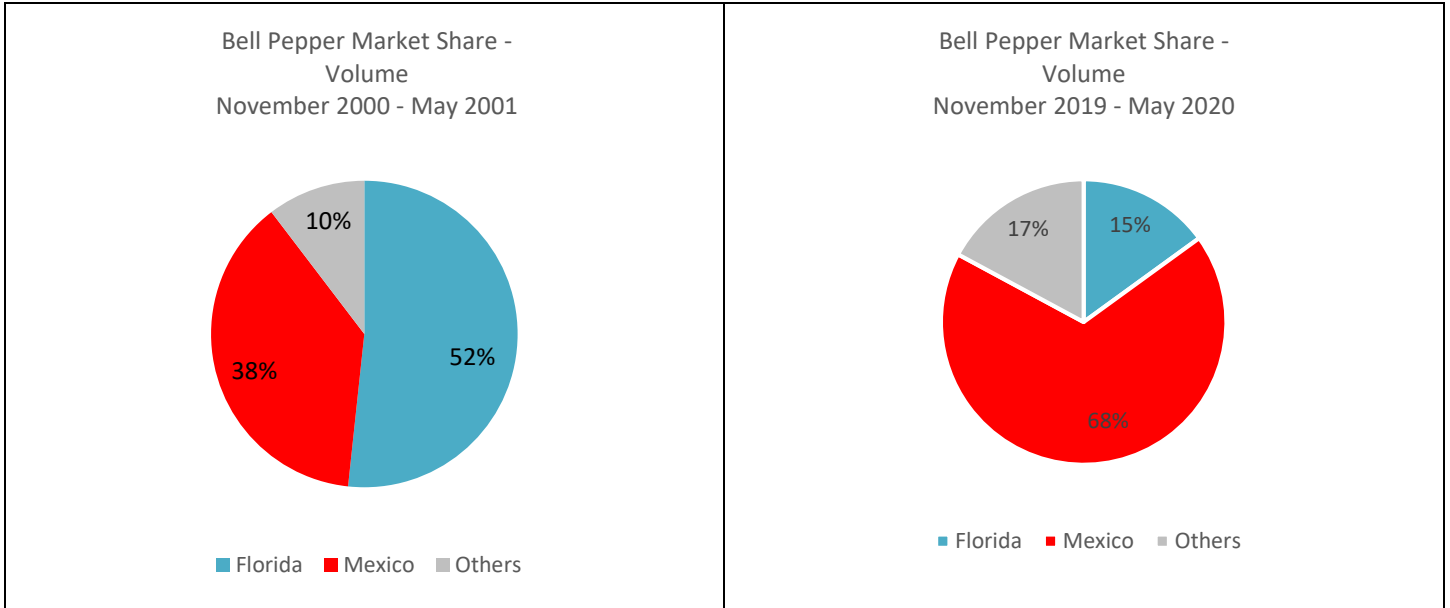
## An Example of Florida’s Market Share and Competitive Challenges

Florida has significant production of a wide variety of specialty crops at different times of the year. However, scrutinizing certain commodities reveals only two major suppliers of the U.S. fresh market during certain months - Florida and Mexico. Florida often stands alone as our nation’s primary domestic producer, facing all international competition.

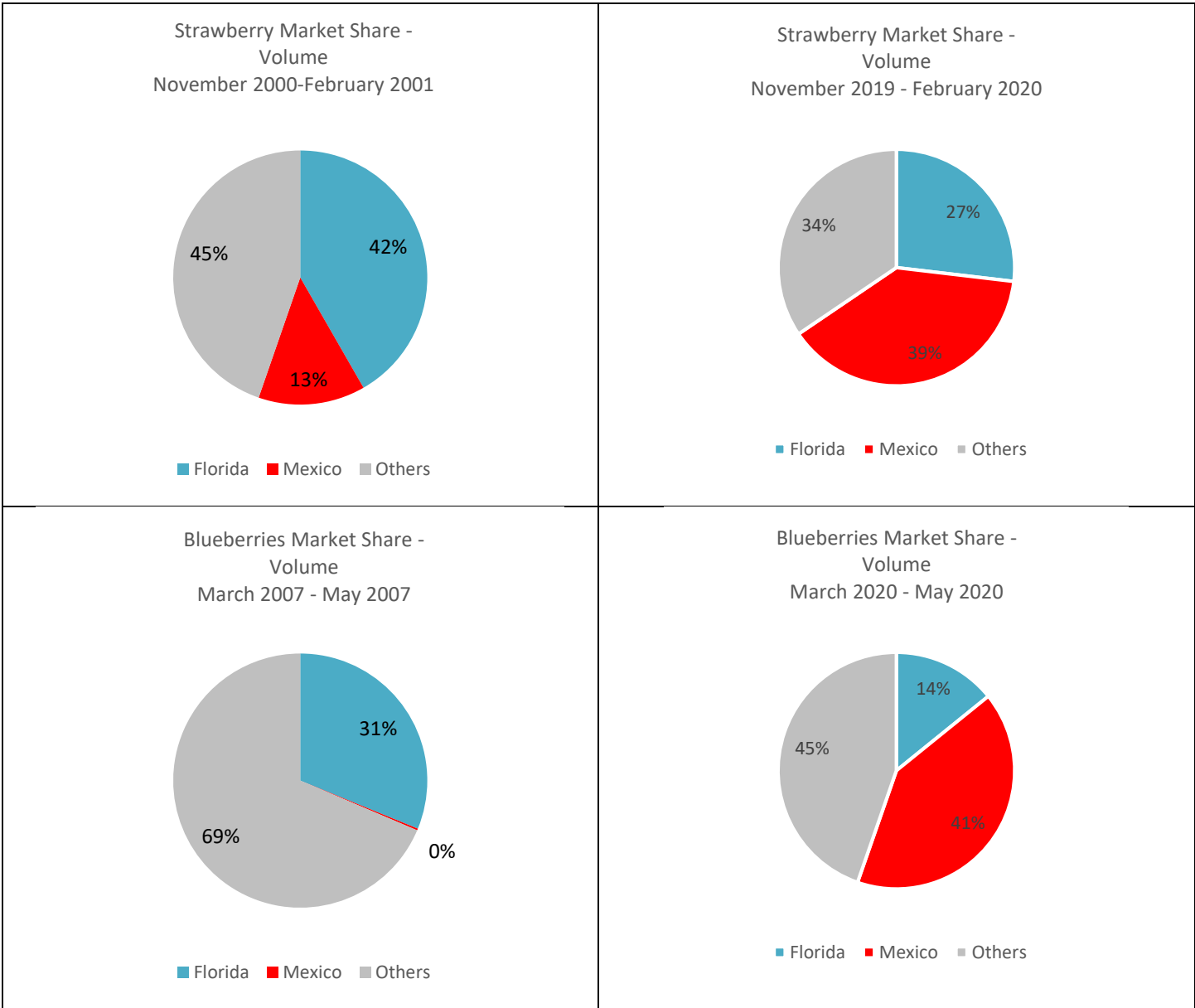
- 87-96%: Percent of combined market share held between Florida and Mexico of fresh round tomatoes from Nov-May. Similar positions exist for many other important commodities in the state, including: bell peppers, cherry tomatoes, cucumbers, eggplant and sweet corn.
- 76-92%: Percent of domestically produced fresh round tomatoes that Florida grows from the months of November – May annually. The state continues producing in lower levels during all but August.
- 25-50: Cents per case farmers may or may not receive on a range of products which can make the difference between failure, struggling and a successful year.
- 39%: The 4 Mexican states of Baja California, Baja California Sur, Sonora, and Sinaloa alone have 50% more land area than the state of California and one quarter the population. Given the advantage in land and migrant labor available in Mexico, we estimate that production in Mexico could grow another 39% if demand in the U.S. permits, more than 20 billion pounds of produce per year.



## Changing Market Share for Florida Farmers' in the U.S.; 2000 v 2020 (Volume)

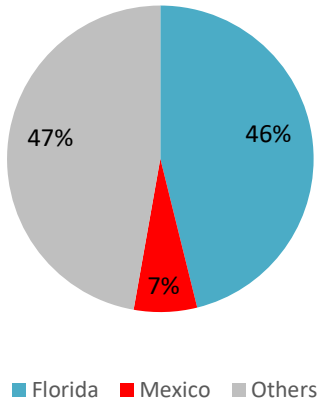


**Changing Market Share for Florida Farmers in the U.S.**

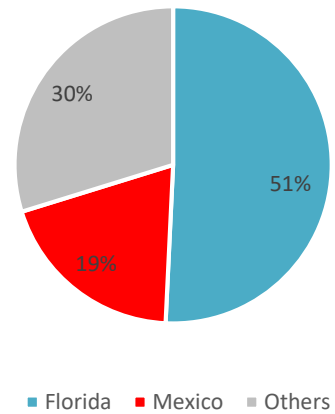


## Changing Market Share for Florida Farmers in the U.S.

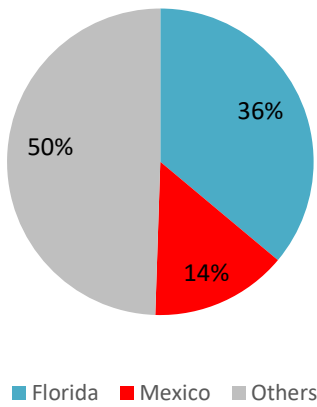
Sweet Corn Market Share -  
Volume  
February - June 2007



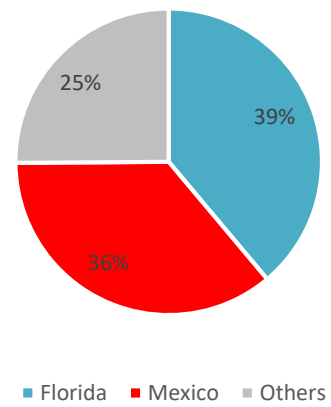
Sweet Corn Market Share -  
Volume  
February 2020 - June 2020



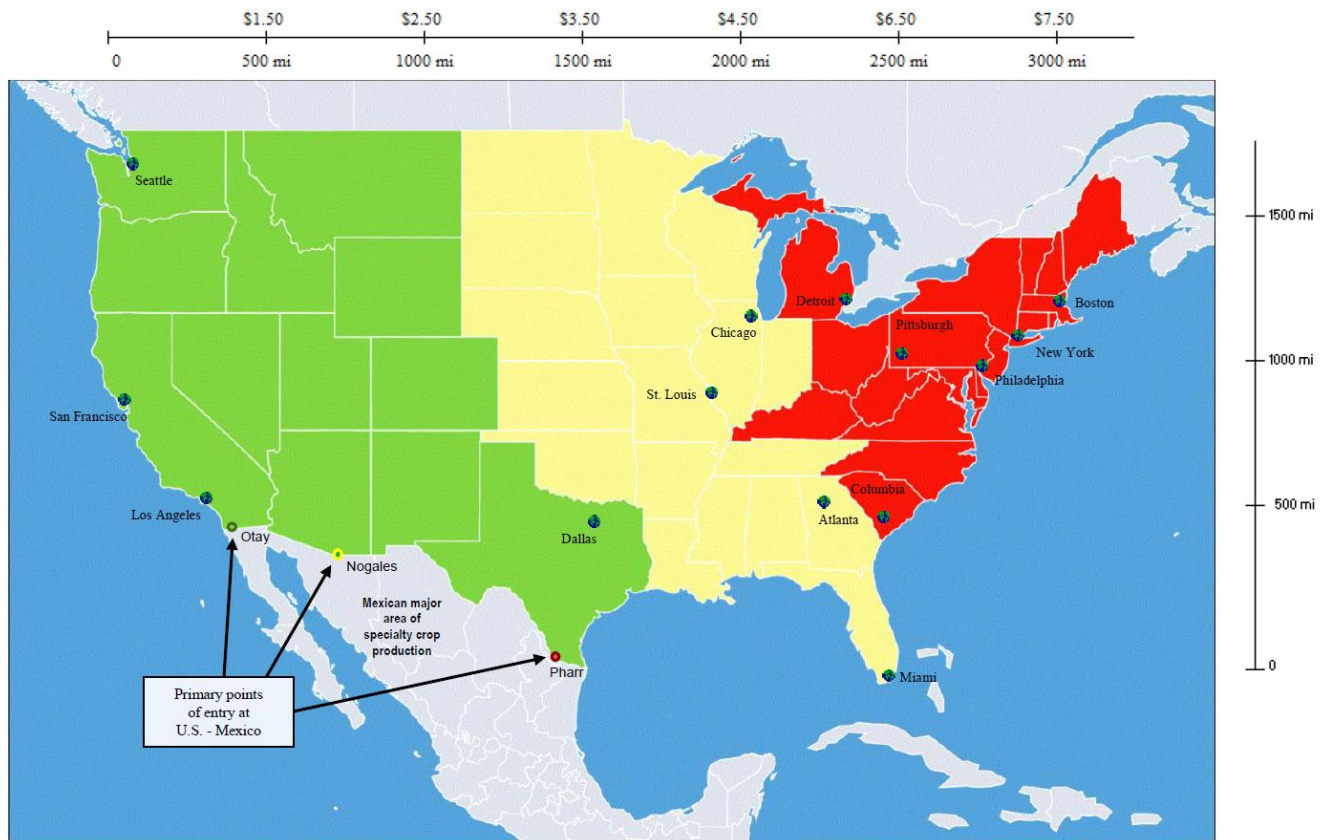
Watermelon Market Share -  
Volume  
April 2000-June 2000



Watermelon Market Share -  
Volume  
April 2020 - June 2020



## Point of Entry, Terminal Markets and General Shipping Costs



Based on 800 – 50 lb cases and USDA truck rates reported weekly.

- 14 U.S. Terminal Markets (Distribution Centers) where product from around the country and world is delivered for sale to operations ranging from independent grocery stores to restaurants. USDA measures these deliveries in 40,000-pound truck units or 800-500-pound cases. Note: Major retail chains operate their own distribution centers that supply their respective stores and facilities with fresh product and their prices are not published.
- 3 Three of the major “Points of Entry” into the United States from Mexico. These are referred to often in reports as specialty product is identified and pricing is examined. Logistics; the cost of fuel, labor and trucks required to deliver product is highly competitive, costly and is meticulously managed. For example, a sweet corn shipment traveling thru Otay Mesa, would be less likely of being shipped across the U.S. from that point and firms would opt for the most efficient route.
- Otay Mesa is the westernmost entry point of the three and product entering at this point would more than likely be supplied to the entire western – coast and as far north as Canada.
  - Nogales is the central point of entry and product entering at this point would more than likely be supplied to areas throughout the central-midwestern area of the U.S. as well as into eastern areas and as far north as Canada.
  - Pharr is the most eastern point of entry and product entering at this point would more than likely be supplied to areas in Texas, the southeastern areas of the U.S. and east coastal states and as far north as Canada

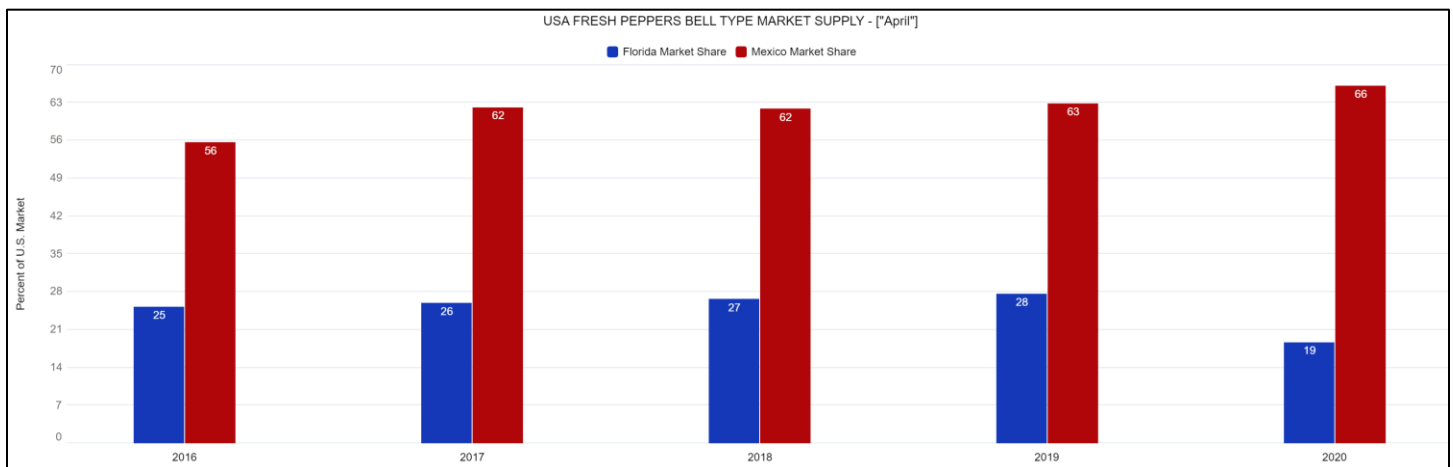
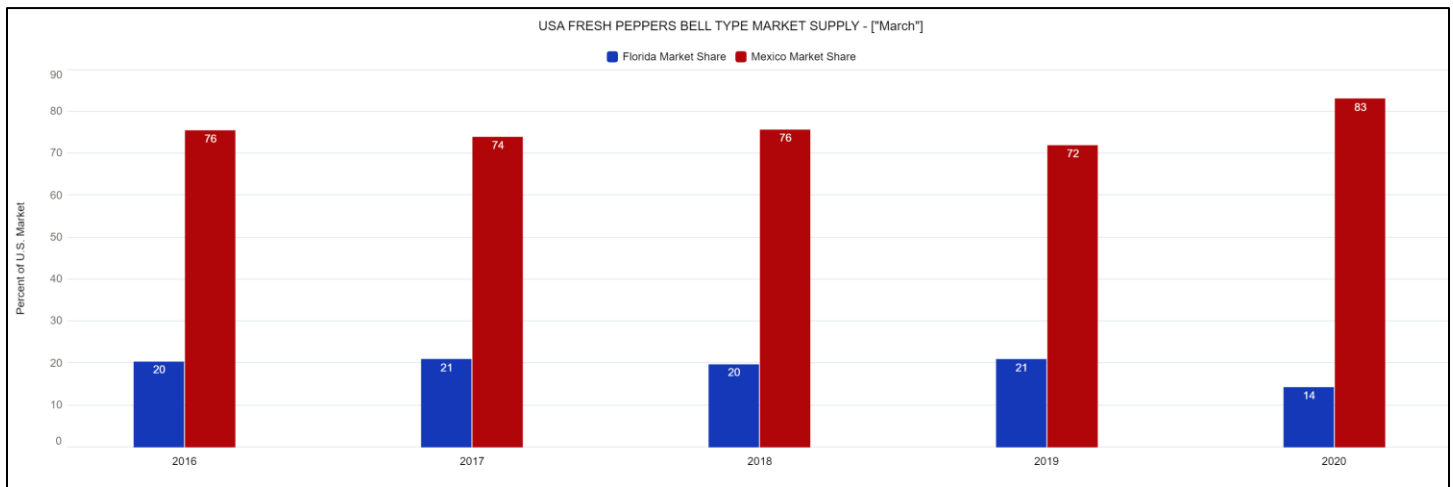
\$1-\$7 Logistics costs are about \$1.50 per 500 miles. As product is shipped to different destinations, these costs rise accordingly and are equally passed on to the total number of cases, cartons, or flats being shipped. For ease of processing, 800 fifty-pound boxes carried on one 40,000-pound truck are used as a standard measurement.

# DEEPER ANALYSIS OF SIX FLORIDA COMMODITIES

## BELL PEPPER Analytics/Market Share Shifts

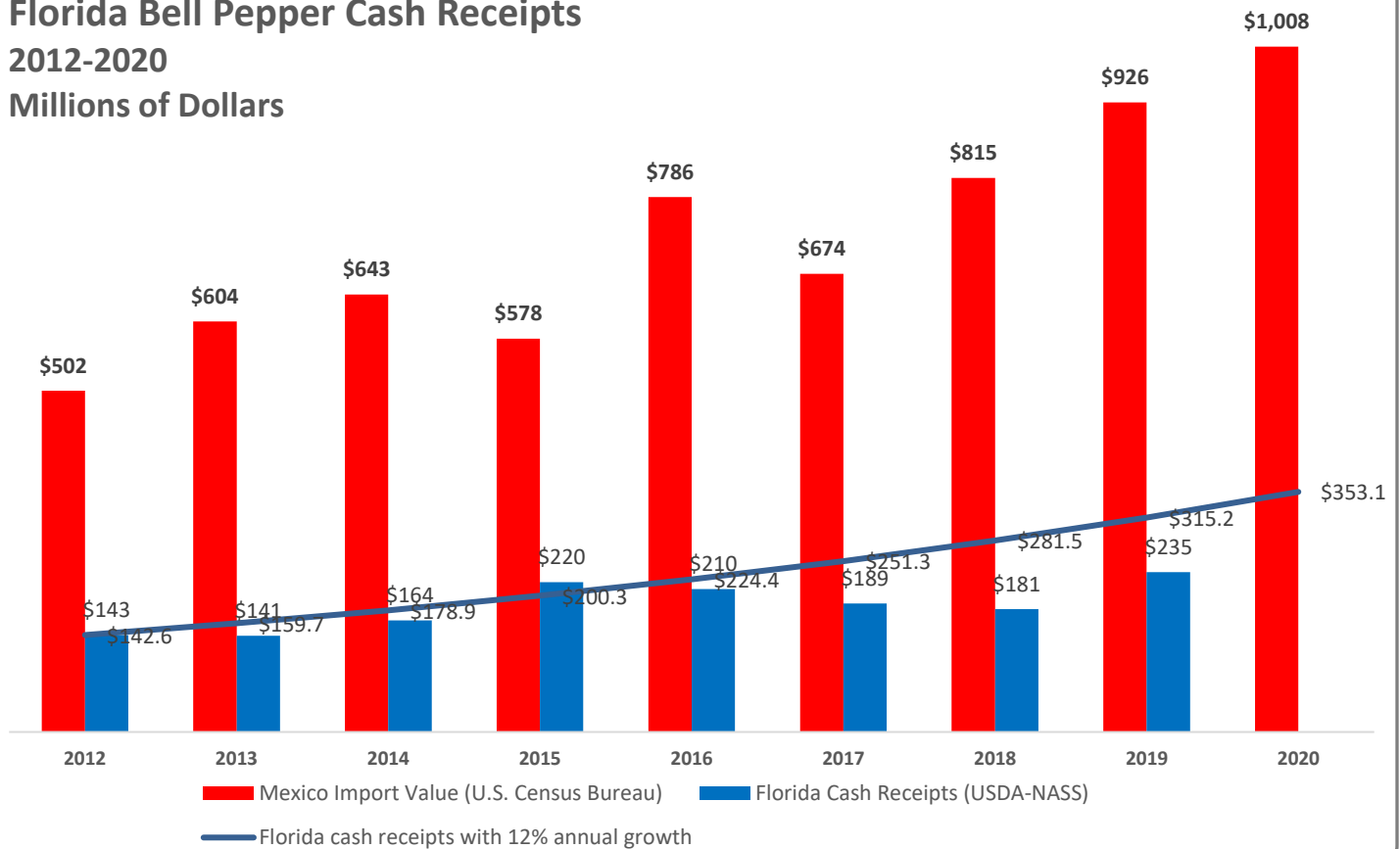
Examining the fresh bell pepper market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through March, Florida and Mexico provide 93% of the U.S. supply of bell peppers, nearly 72 million cases. Florida's lowest shipping point prices from November – May of 2015-2020 averaged \$15.14 per case.

Peppers imported from Mexico through Nogales, AZ (for western U.S. market) averaged a low price of \$11.70, and product imported through Texas (for eastern U.S. market) averaged \$9.29 per case. Mexican product imported through Texas destined for areas 500-2500 miles eastward, with added logistical costs (shipping) ranging from \$1.50-\$4 per carton, should reasonably have been marketed with the additional shipping cost at approximately \$14.50, yet they were priced 36% below that level. In east coast areas, Mexican aggressively priced product in this range would force Florida product to charge similar prices minus shipping, effectively setting minimal entry price positions, reducing market share, revenues and profitability.





## Mexico Bell Pepper Exports and Florida Bell Pepper Cash Receipts 2012-2020 Millions of Dollars



The economic injury to Florida, is compounded by loss of growth of sales in addition to the losses estimated that occurred due to lower pricing on the previous chart.

- The value of Mexican imports to the U.S. grew 12% per year on average between 2012 and 2019. The 2019 value of production was 84% above 2012 production.
  - Average sales (2015-2020) annually of \$797 million.
- Florida's average year-on-year growth during the same period was 9%, with 2019 production at 64% above 2012 production.
  - Average cash receipts (2015-2019) annually of \$207 million.
- \$353 million: cash receipts in 2020 of bell peppers, if the growth rate (12%) experienced by Mexico is applied to Florida's bell pepper value of production.

## Historical supply of Florida production and Mexican bell pepper exports to the U.S.

Mexican exports remained between 300-400 million pounds from 2000-2004, more product began flowing into the US. beginning in 2006 (surpassing 500 million pounds) and continued to expand exceeding 600 million pounds by 2010. For each additional 50 million pounds, about 1,000 supermarkets could be supplied for a year, or some 9,600 stores by 2019. Comparing the relative supply positions of Florida and Mexico; in 2000 (FL=46% v. MX=43%) and they are significantly reversed by 2017 (MX=73%; FL 14%). Total demand for the product expanded as well.

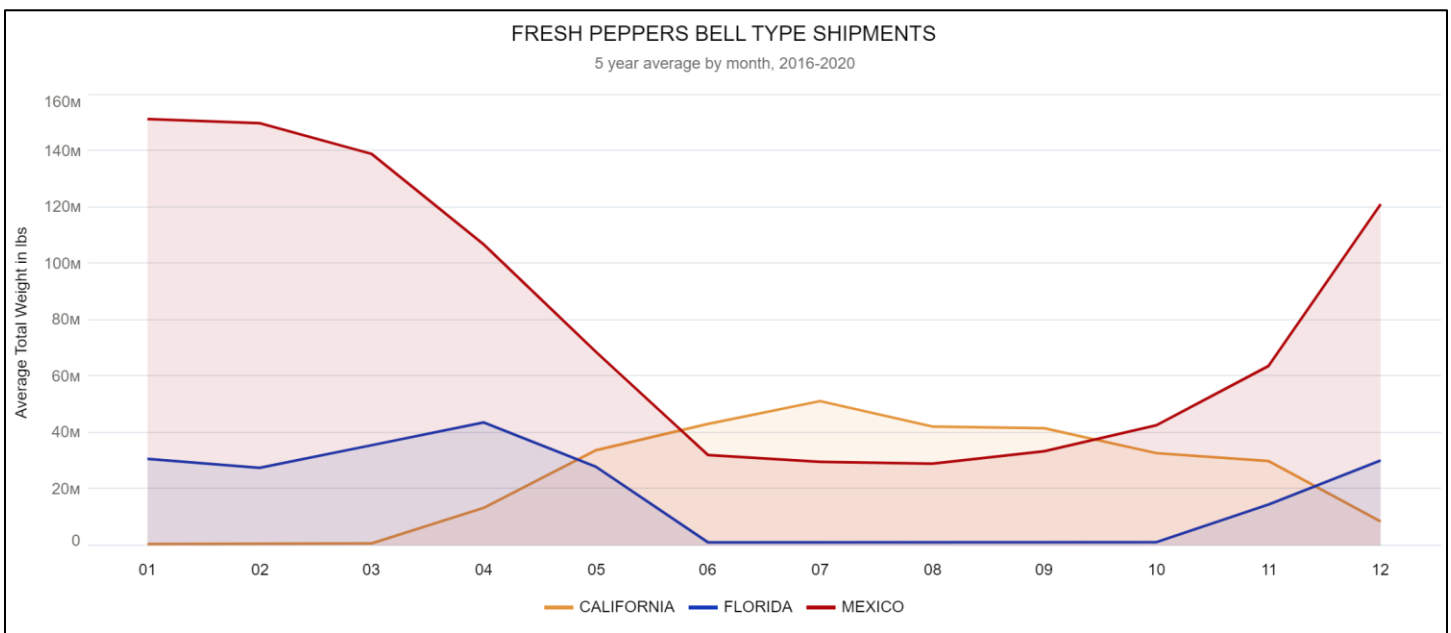
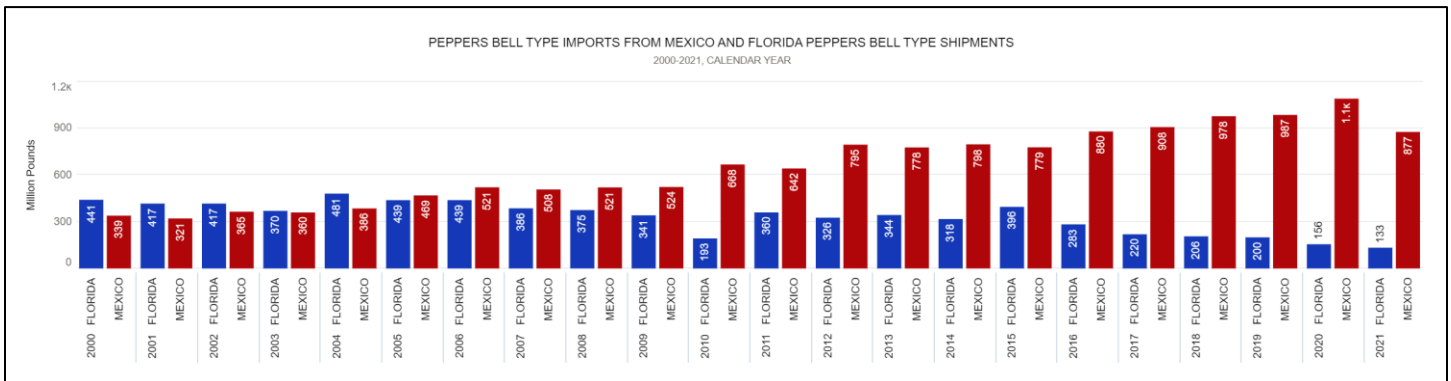
*\*Values on the graphs for 2021 were not used in calculations as only partial year values are currently available. 2021 values below are year to date shipments through July 2021.*

221%: Expansion of Mexican product from 2000 to 2020

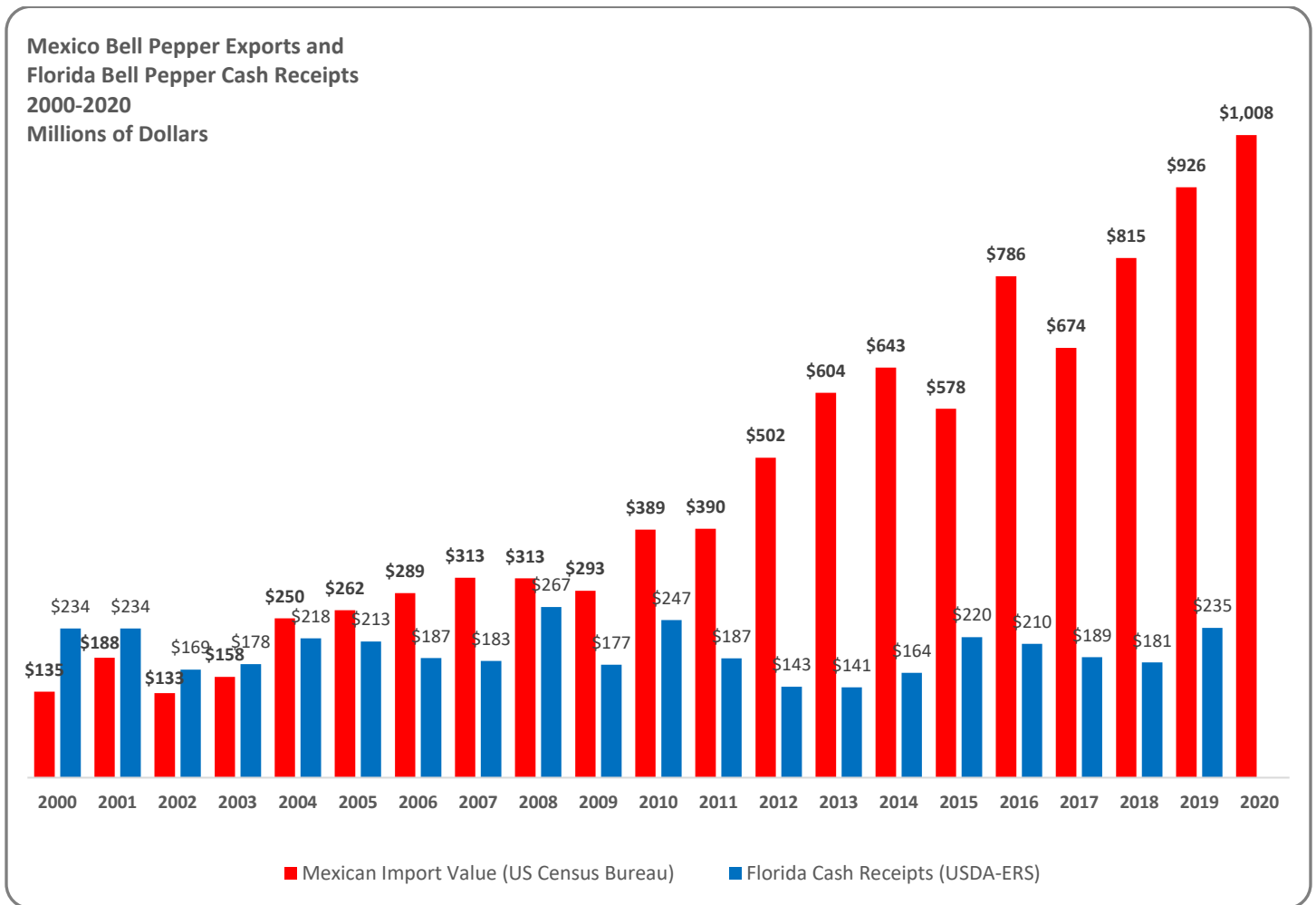
\$949 million: Mexican average number of pounds exported from 2015-2020

-55%: Decline of Florida product from 2000 to 2017

\$235 million: Florida average number of pounds produced from 2015-2020



## Historical value of Florida production and Mexican bell pepper exports to the U.S.



648%: Expansion of the value of Mexican product from 2000 to 2020

\$797Mn: Mexican average value exported from 2015-2020

0.4%: Expansion of the value of Florida product from 2000 to 2019

\$207Mn: Florida average production value from 2015-2019

## Historical Pricing strategy and relative high-low ranges of Florida, California, and Mexico

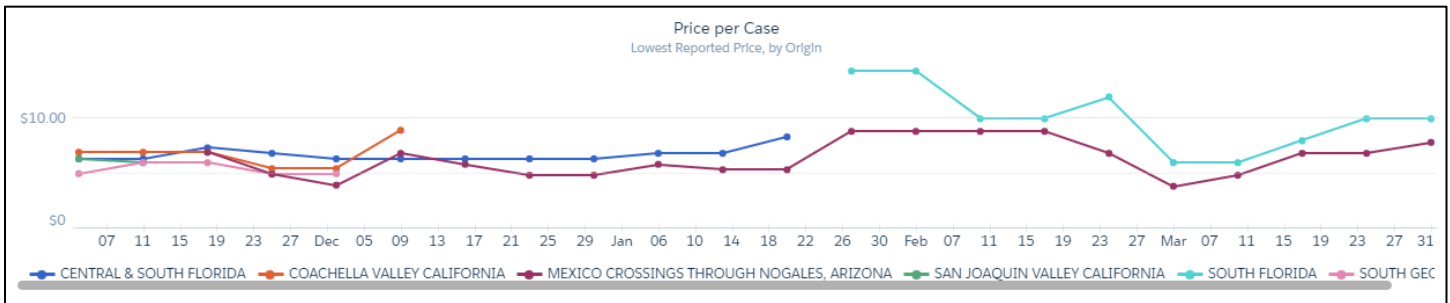


Figure 1: Lowest reported bell pepper prices, 2006-2007 season for the November - March production window. This is the first year, Mexican bell peppers surpass 500 million pounds, and Florida stagnates and begins a steady decline.

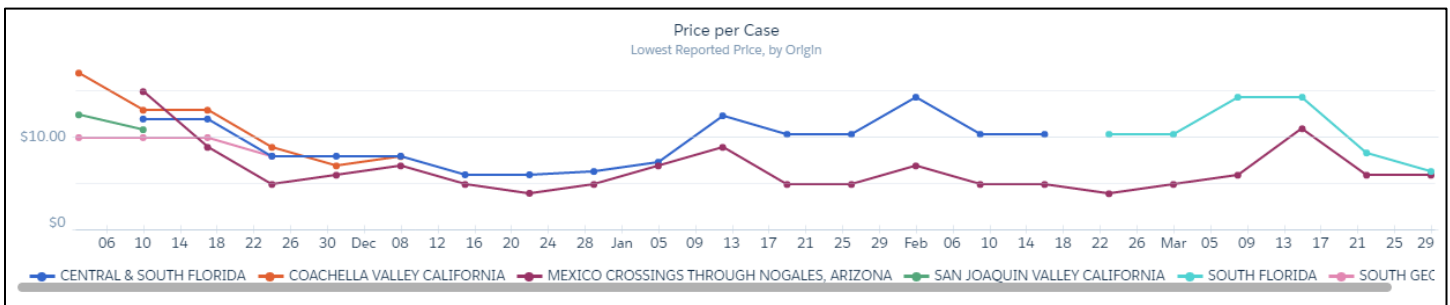


Figure 2: Lowest reported bell pepper prices, November 2007-March 2008. Mexico continues to supply 508-524 million pounds from 2006-2009; sufficient to meet the needs of approximately 615 U.S. super markets.

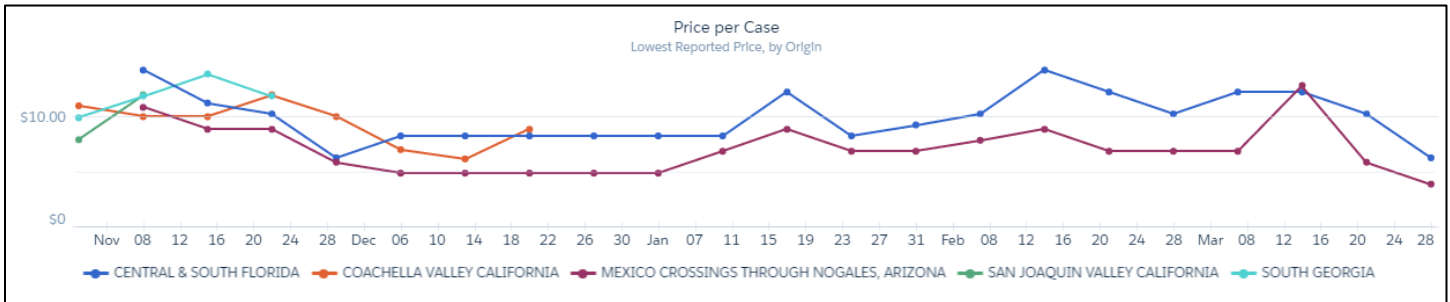


Figure 3: Lowest reported prices, November 2008-March 2009.

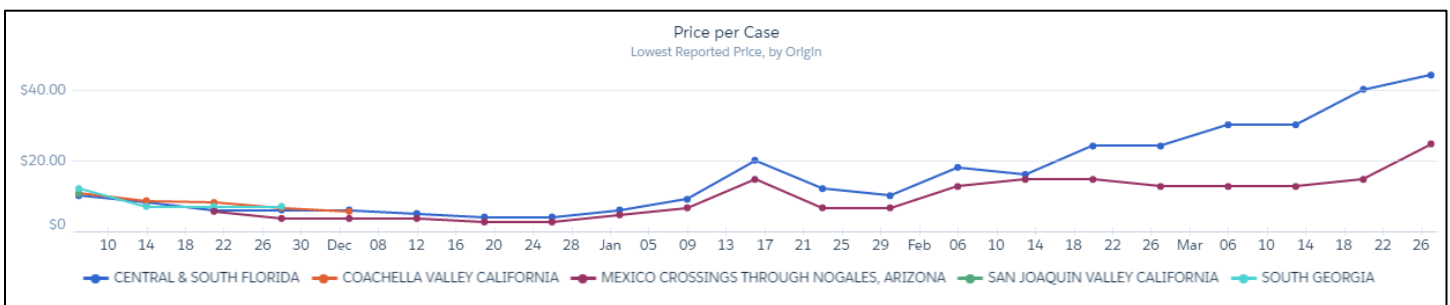


Figure 4: Lowest reported prices, November 2009-March 2010. This is the first year, Mexican bell peppers surpass 600 million pounds, and Florida continues to have production declines.

## 2017-2018 Season

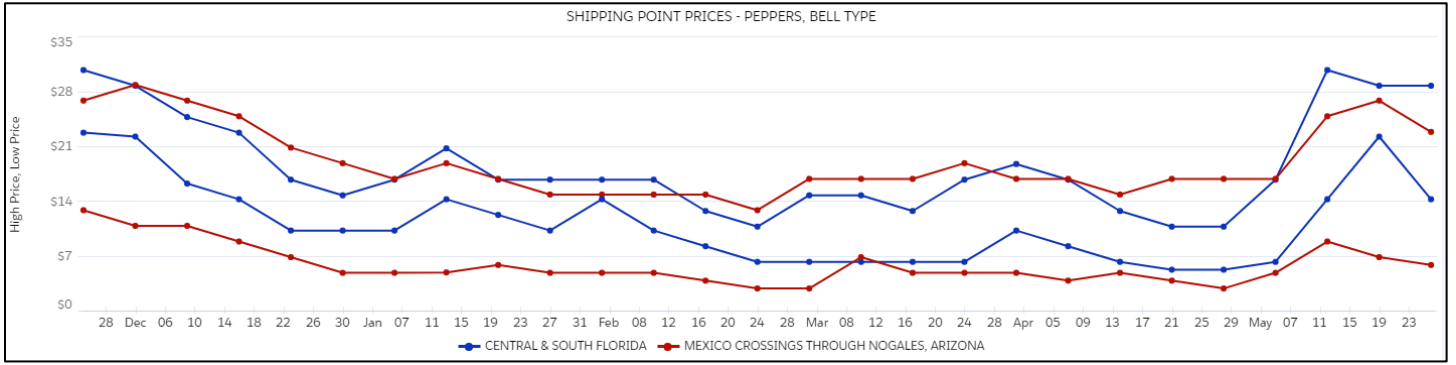


Figure 3: Price of peppers imported through Nogales ranged from approximately \$5-\$25.

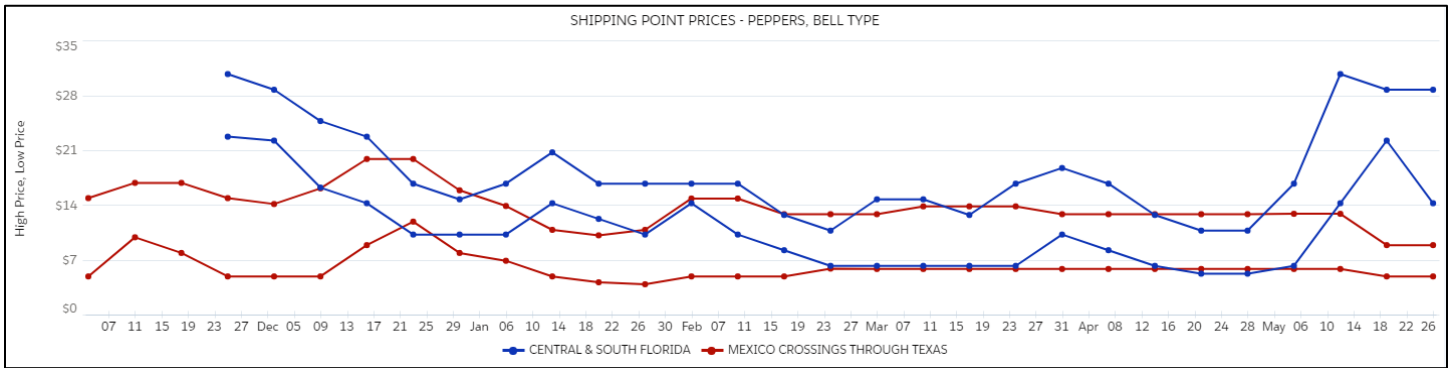


Figure 4: Peppers imported through Texas during the same time ranged from \$5-\$20, and most often from \$5-\$15.

## 2018-2019 Season

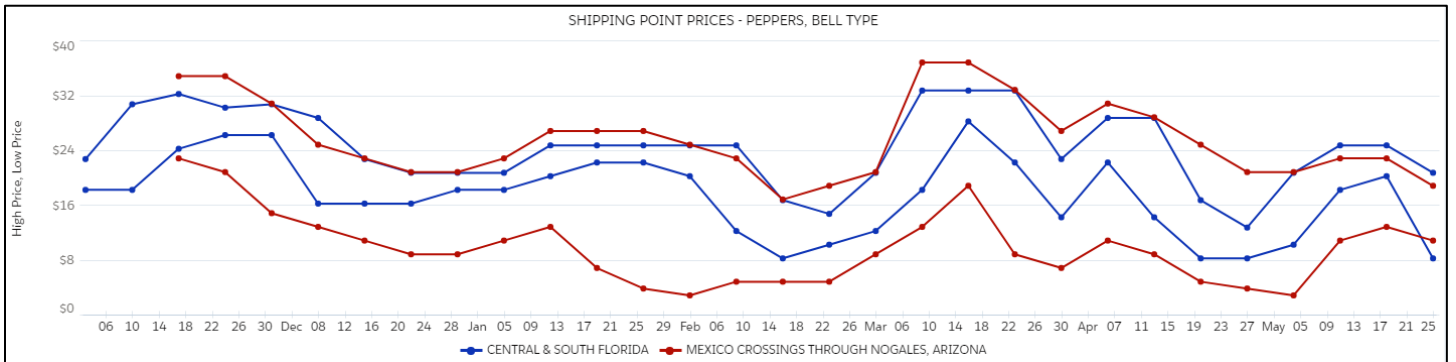


Figure 5: Peppers imported through Nogales ranged from about \$4-\$36.

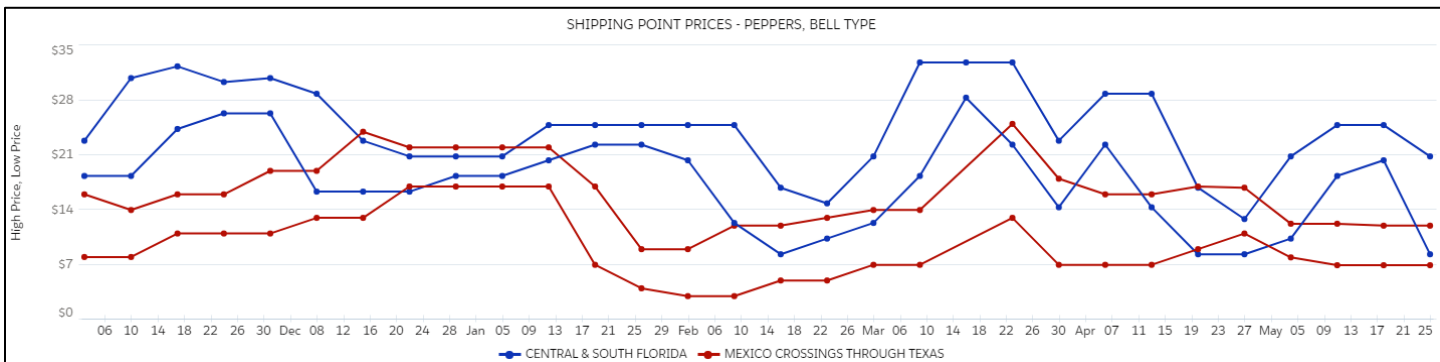


Figure 6: Simultaneous imports through Texas were priced about \$4-\$25, with most prices between \$7-\$14

### 2019-2020 Season

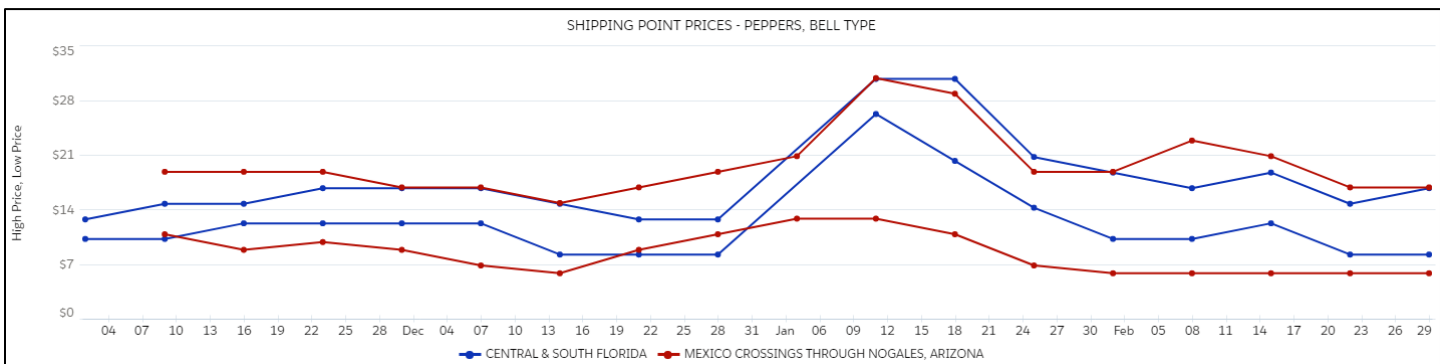


Figure 7: While not as pronounced as the difference in price between imports through California and Texas, there is a significant difference in the price range between peppers imported through Arizona versus through Texas. This data includes four different sizes, and larger fruit appears to command a higher price in general; however, excluding smaller or larger fruit does not change the differences in price range.

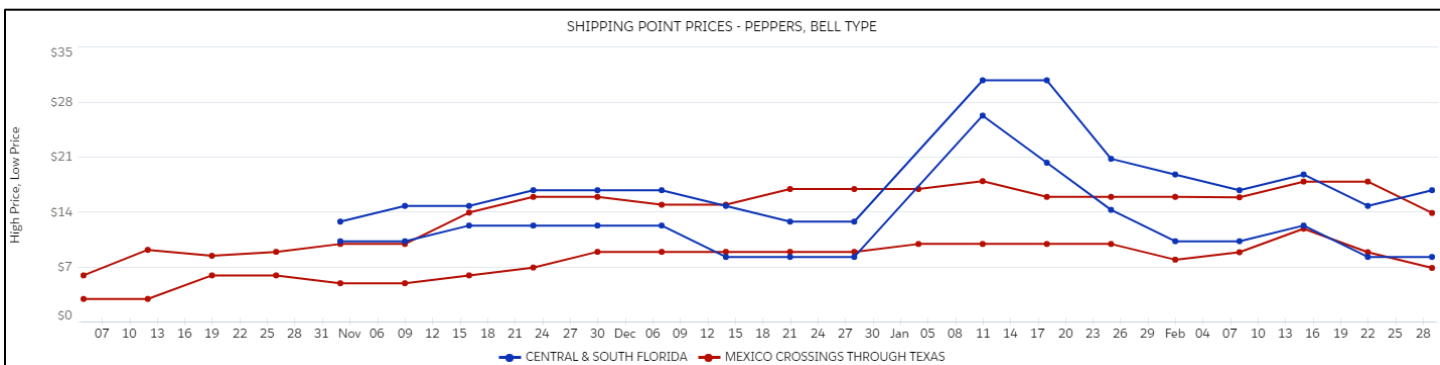


Figure 8: Peppers imported through Arizona had an approximate range of \$6-\$30, while peppers imported through Texas had a much narrower range, approximately \$6-\$18.

## 2020-2021 Season

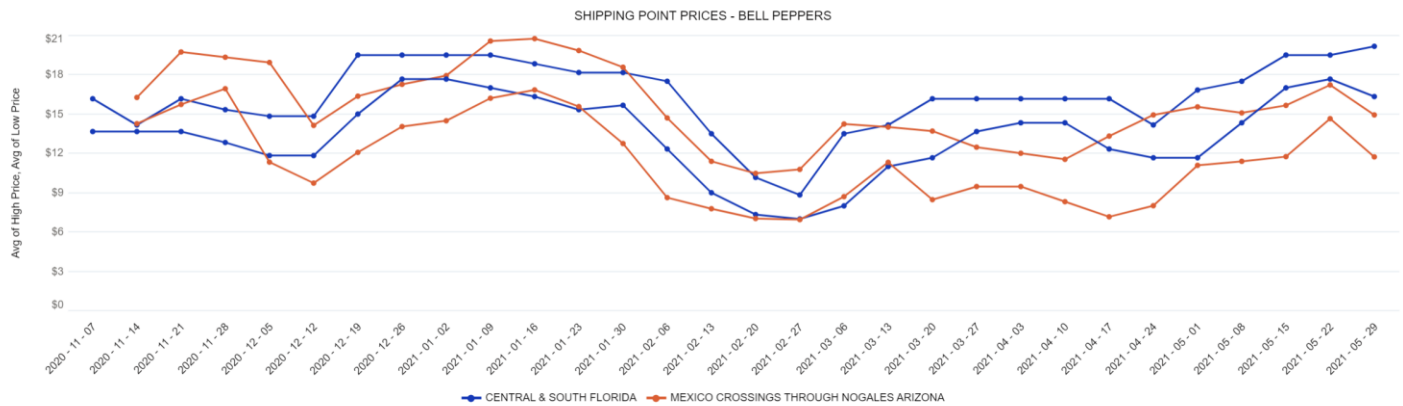


Figure 21: While not as pronounced as the difference in price between imports through California and Texas, there is a significant difference in the price range between peppers imported through Arizona versus through Texas. This data includes four different sizes, and larger fruit appears to command a higher price in general; however, excluding smaller or larger fruit does not change the differences in price range.

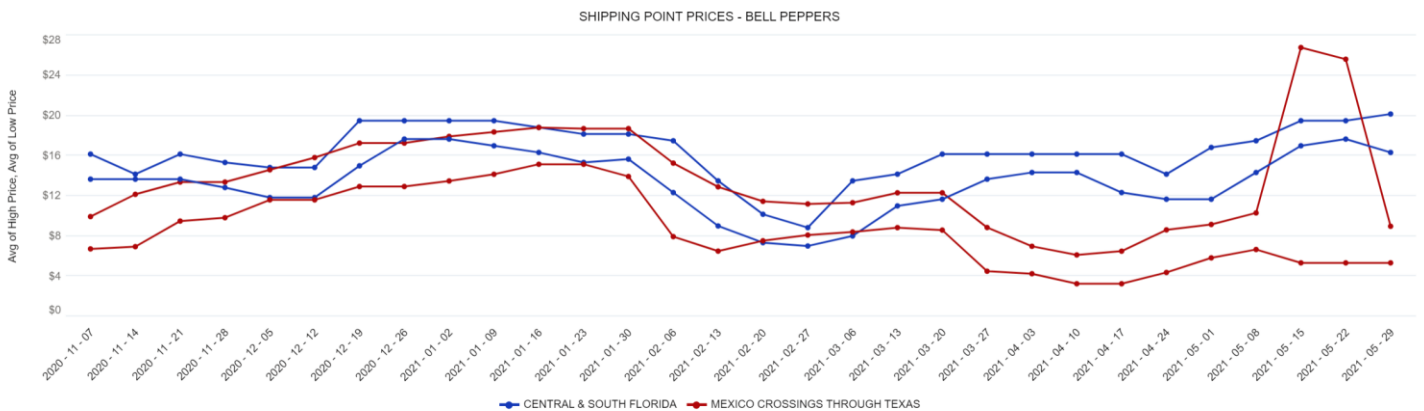


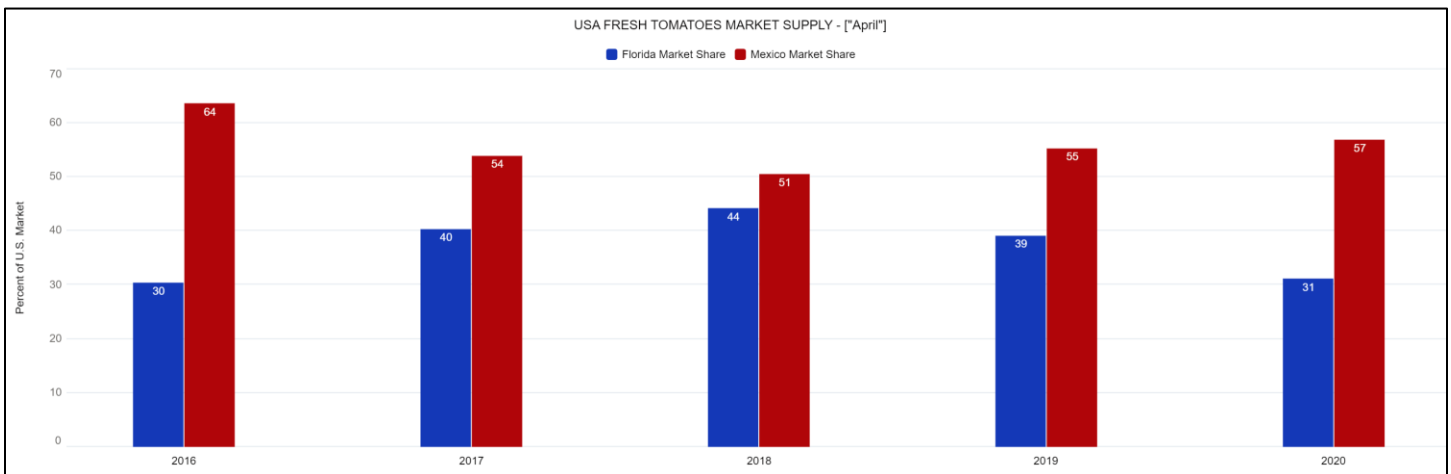
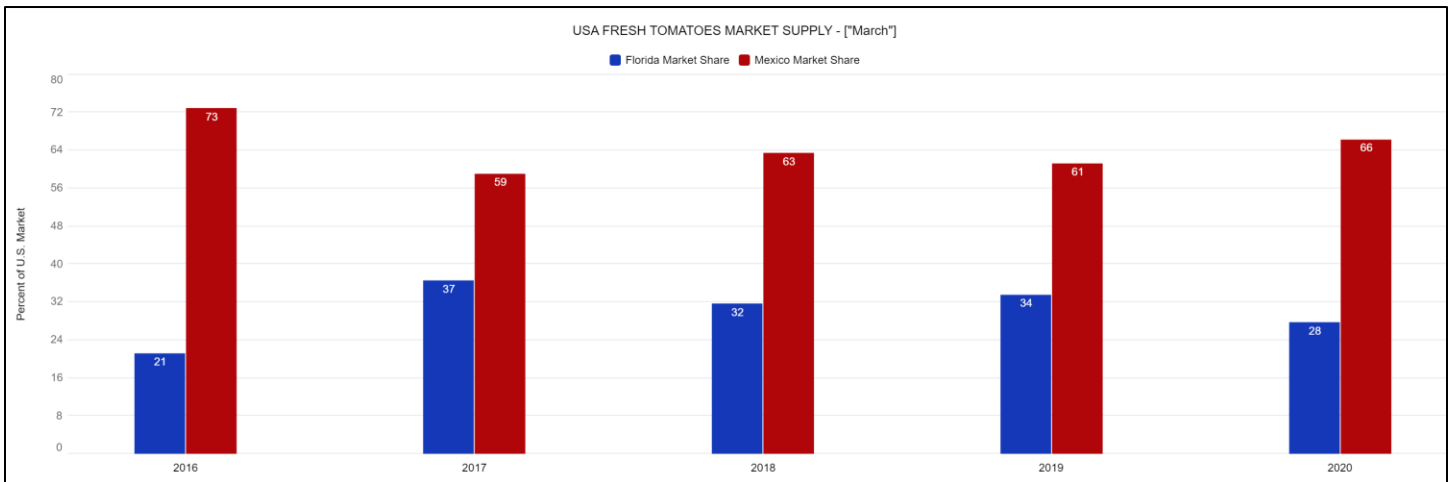
Figure 22: Peppers imported through Arizona had an approximate range of \$7-\$28, while peppers imported through Texas had a much narrower range, approximately \$4-\$20.

## TOMATO Analytics/Market Share Shifts

Examining the fresh tomato (rounds) market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through March, Florida and Mexico provide 95% of the U.S. supply of tomato (rounds), nearly 124 million cartons. Shipping point prices for Florida product during November – May of 2015-2020 averaged a low of \$13.49 for Florida.

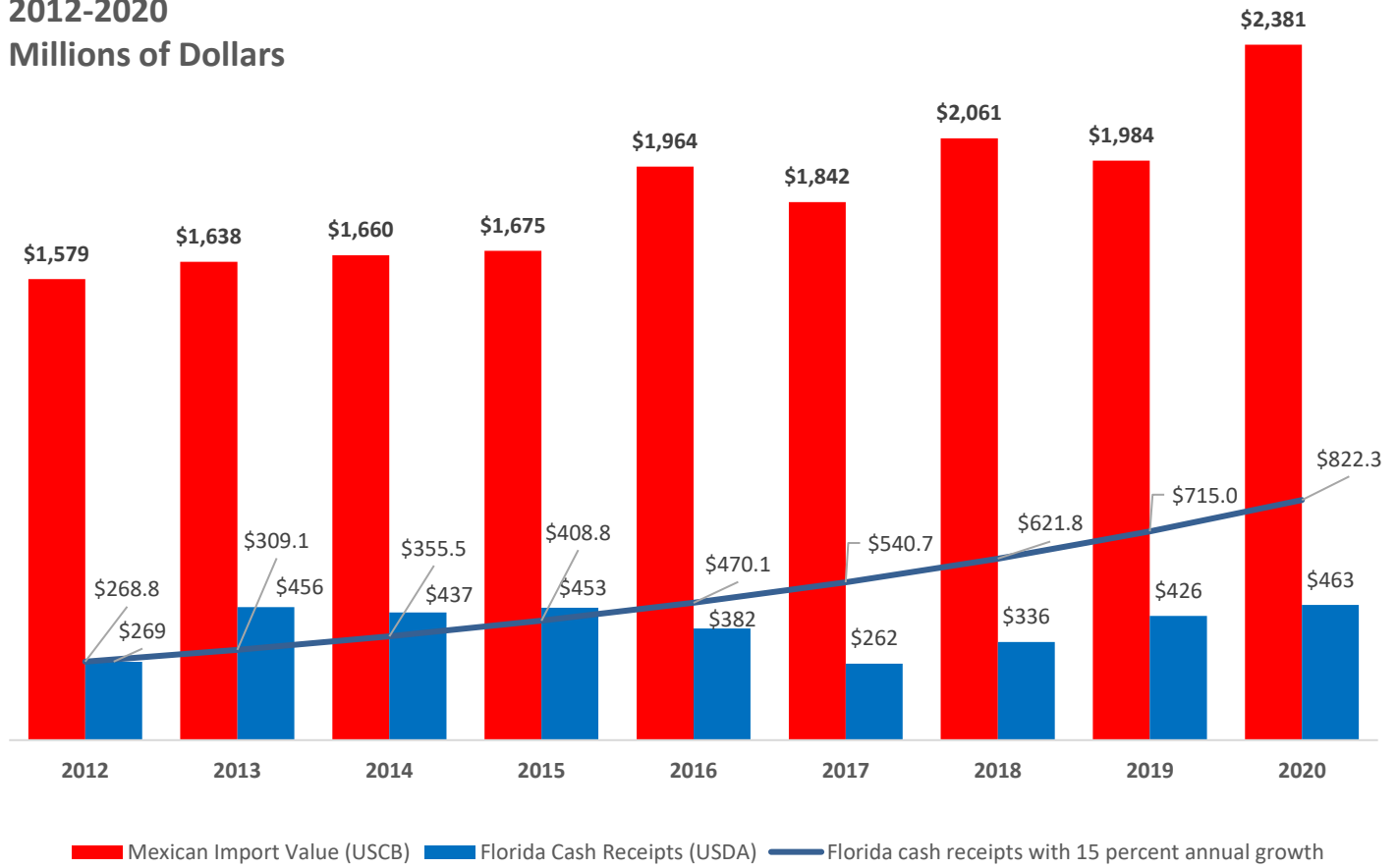
Mexican tomatoes averaged a low price of \$13.42 into the western U.S. through San Diego--Otay Mesa and \$10.66 per unit/case through Nogales, AZ; product likely destined to central regions in the U.S., priced 50% below (\$17.35) and low enough to distort market pricing and eliminate competition. Mexican tomatoes entering thru Texas were priced at \$12.09—product destined for the eastern U.S. Each of the Mexican low prices here, precludes shipments from competing from Florida when shipping costs are added into Florida priced product (\$12.24-\$12.44) traveling potentially westward.

Conversely, Mexican product imported through Texas destined for areas 500-2500 miles eastward, should see an increase in price as shipping adds from \$1.50-\$4 per carton. In east coast areas, Mexican aggressively priced product in this range would force Florida product to charge similar prices minus shipping, effectively setting minimal entry price positions, reducing market share, revenues and profitability.





**Mexico Tomato Exports and  
Florida Tomato Cash Receipts  
2012-2020  
Millions of Dollars**



The economic injury to Florida, is compounded by loss of growth of sales in addition to the losses estimated that occurred due to lower pricing on the previous chart.

- The value of Mexican imports to the U.S. increased 51% from 2012 to 2020.
  - MX average sales (2015-2020) annually of \$1.985 billion.
- Florida’s tomato sales increased by 72% during the same period.
  - FL average cash receipts (2015-2020) annually of \$387 million.
- \$822 million; cash receipts in 2020 of Florida tomatoes, if Florida growers had experienced the same growth rate Mexico experienced between 2000 and 2020.

## Historical supply of Florida production and Mexican tomato exports to the U.S.

Mexican exports remained on a steady course of expansion for much of the period between 2000-2016 and first exceeded Florida in 2010, which was also a year that a freeze curtailed significant production in Florida. Comparing the relative supply positions of Florida and Mexico; in 2000 (FL=67% v. MX=33%) and they are nearly perfectly reversed by 2017 (MX=68%; FL 32%). Total demand for the product expanded as well.

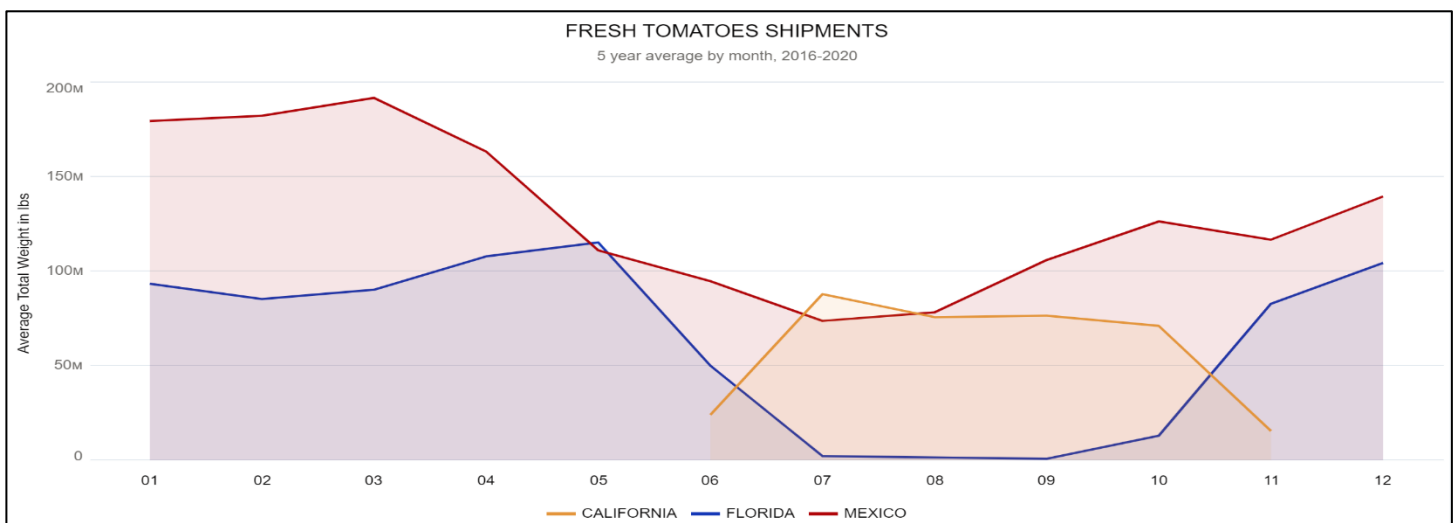
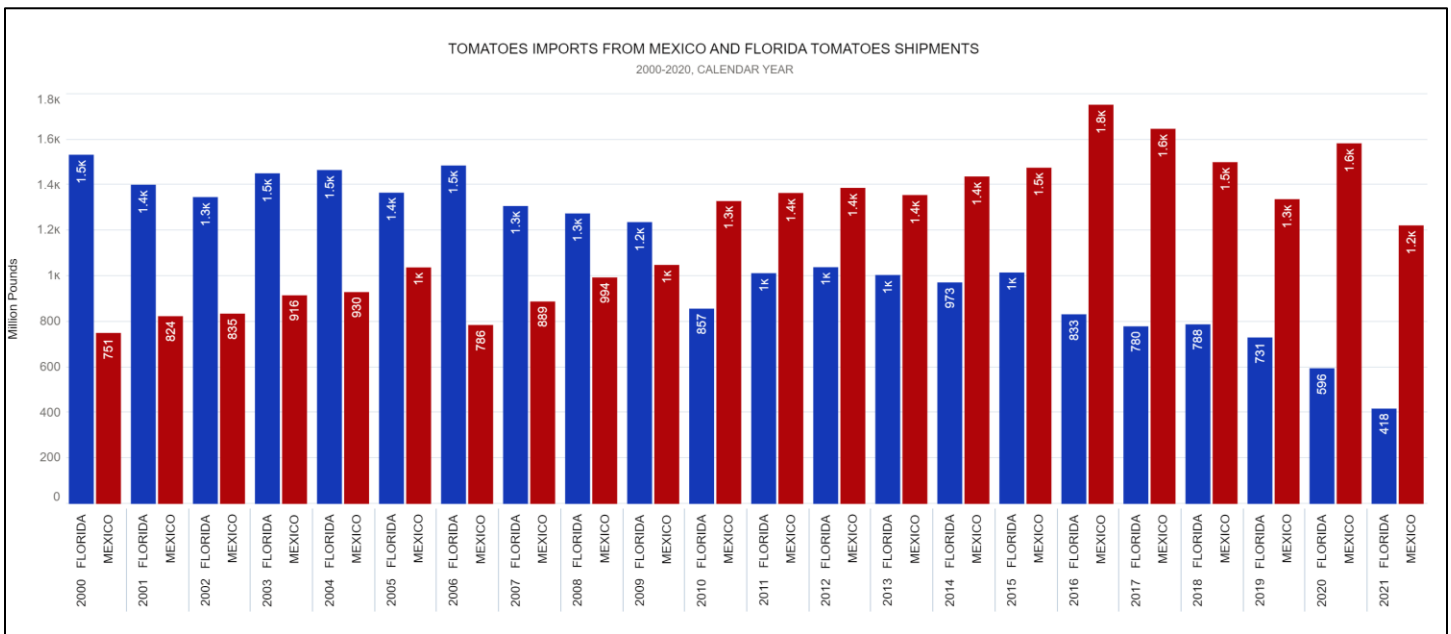
\*Values on the graphs for 2021 were not used in calculations as only partial year values are currently available. 2021 values below are year to date shipments through July 2021.

152%: Expansion of Mexican product from 2005 to 2020

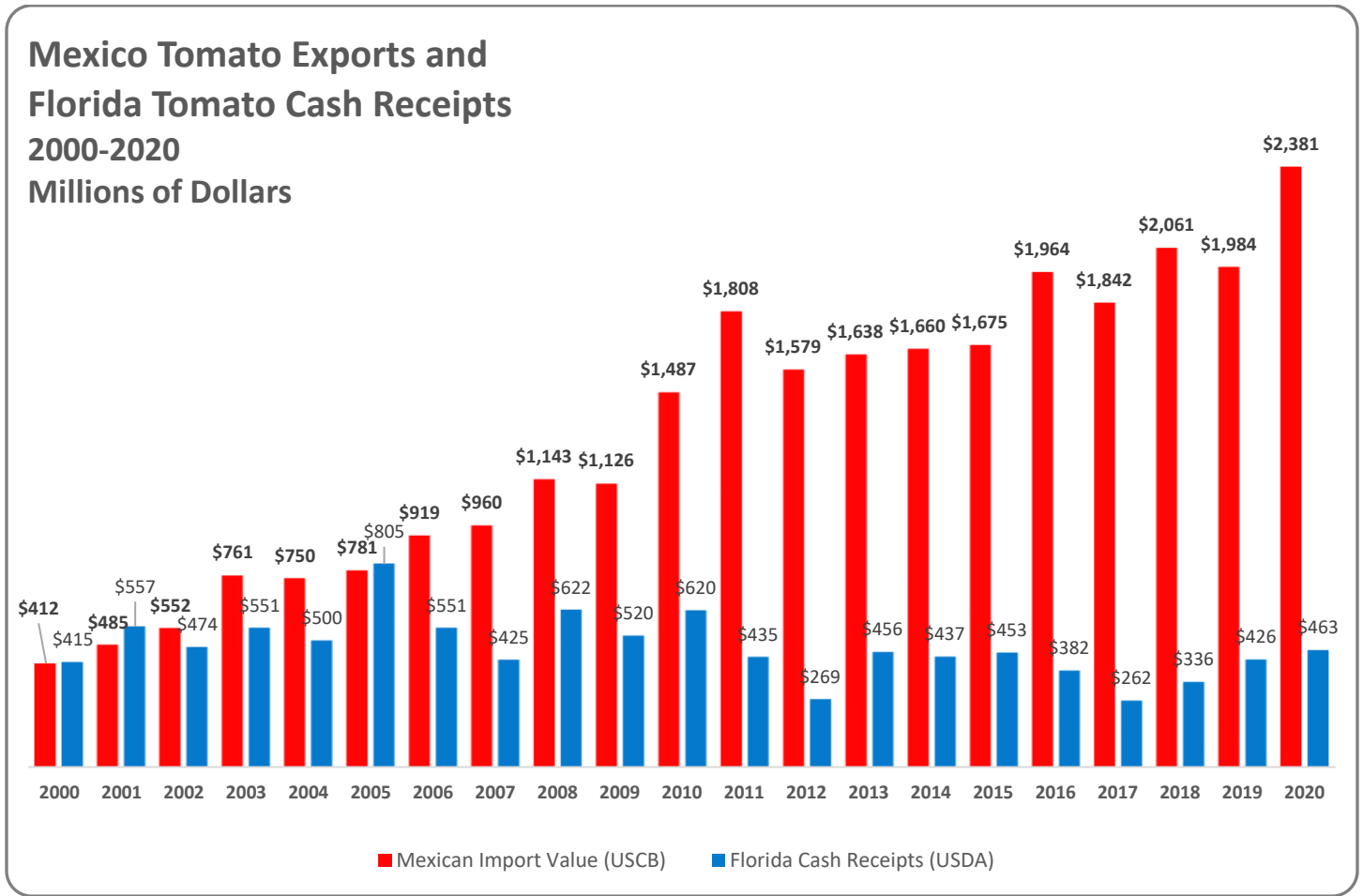
\$1.51 billion: Mexican average number of pounds exported from 2015-2020

-52%: Decline of Florida product from 2002 to 2019

\$782 million: Florida average number of pounds produced from 2015 – 2020



**Historical value of Florida production and Mexican tomato (rounds) exports to the U.S.**



478%: Expansion of the value of Mexican product from 2000 to 2020

\$1.987 billion: Mexican average value exported from 2015-2020

3.4%: Increase in the value of Florida product from 2000 to 2019

\$377.1 million: Florida average production value from 2015-2020

## Historical Pricing strategy and relative high-low ranges of Florida, California, and Mexico

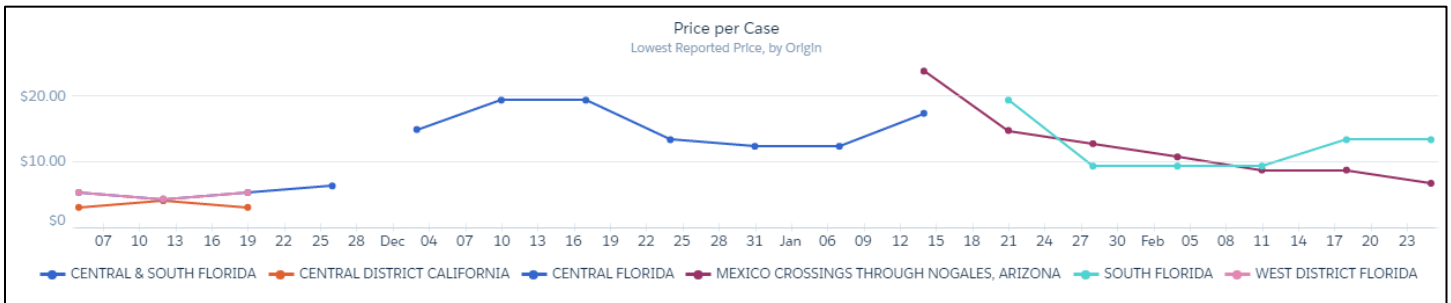


Figure 9: Lowest reported case prices for tomatoes, November 2005 – February 2006 for all recorded suppliers. The graph above shows only prices for 25lb cartons, the most common package shipped by Florida growers during the winter months.

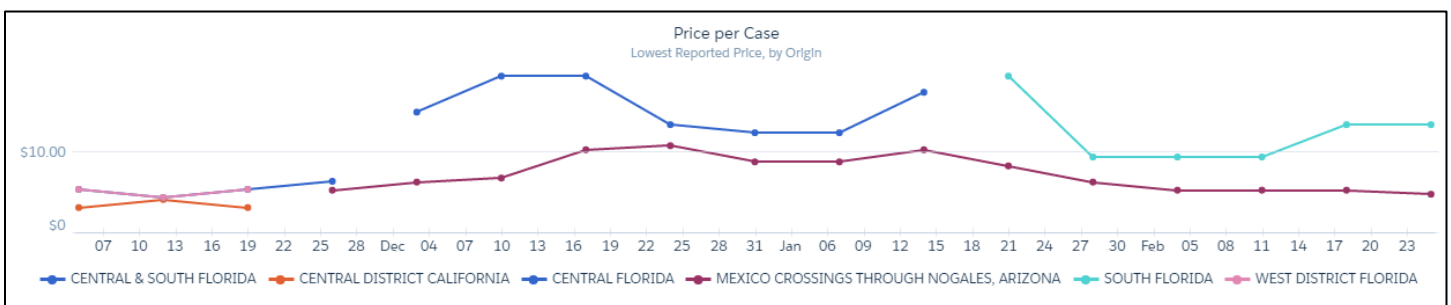


Figure 10: As above, but incorporating 1-layer flats, which weigh 15 lb. At a constant price per pound, case prices for this package size should be approximately 60% of the 25lb case price. For this season, Nogales product sold for about the same price per pound as Florida product.

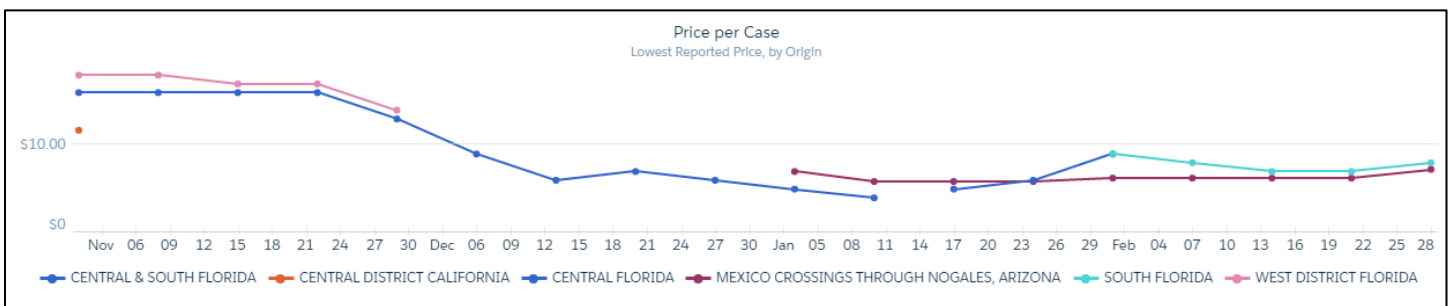


Figure 11: This chart shows lowest reported case prices from November 2008 through February 2009, for 25 lb cartons only. Prices appear similar.

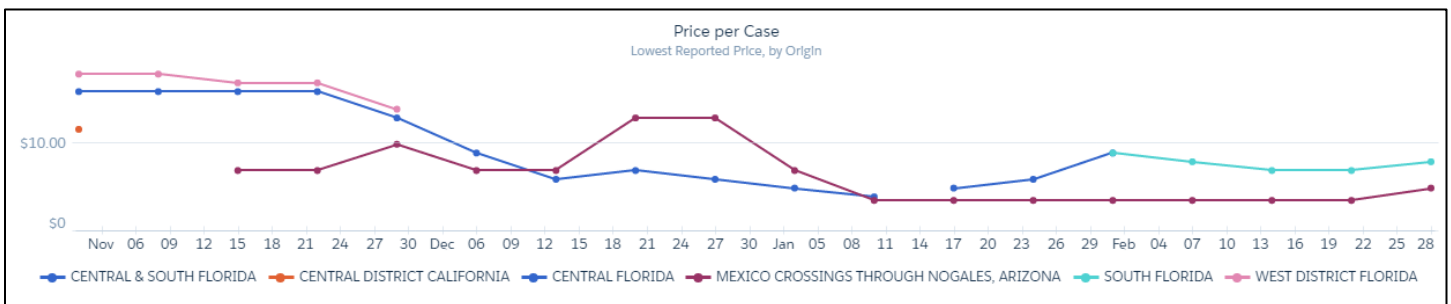


Figure 12: When 15-lb flats are added to the above chart, prices of product from Nogales appear to exceed those of Florida product, which may be the result of the suspension agreement negotiated by US tomato growers.

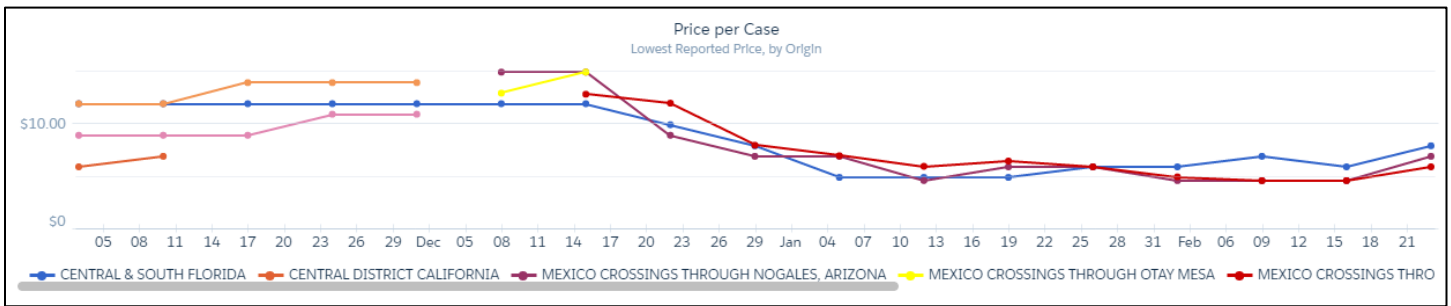


Figure 13: The same pattern appears to hold in the November 2012 - February 2013 window. Florida product is almost exclusively packaged in 25lb cartons, and Mexican product in a mix of 25lb cartons and 20lb 2-layer flats, indicating a higher per-pound price for Mexican product.

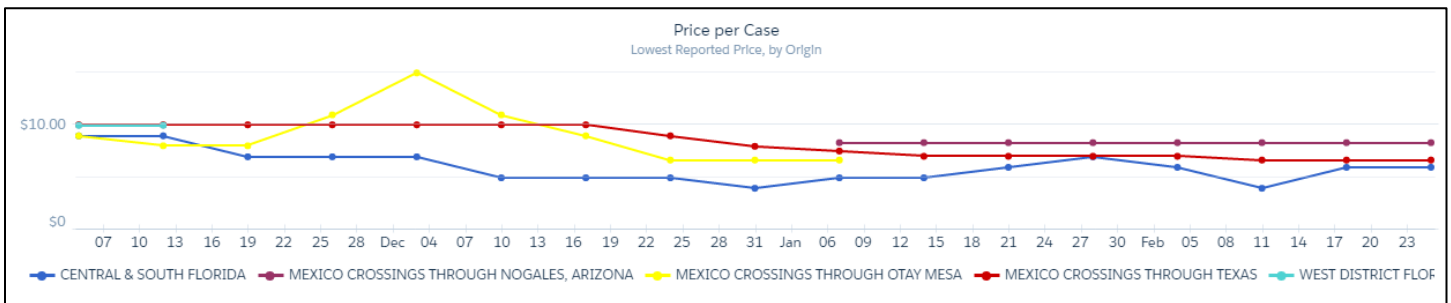


Figure 14: Lowest reported case prices for all producers, including 20-lb flats and 25lb cartons. Again, Florida product is almost exclusively in 25lb cartons with Mexican product divided between flats and cartons.

## 2017-2018 Season

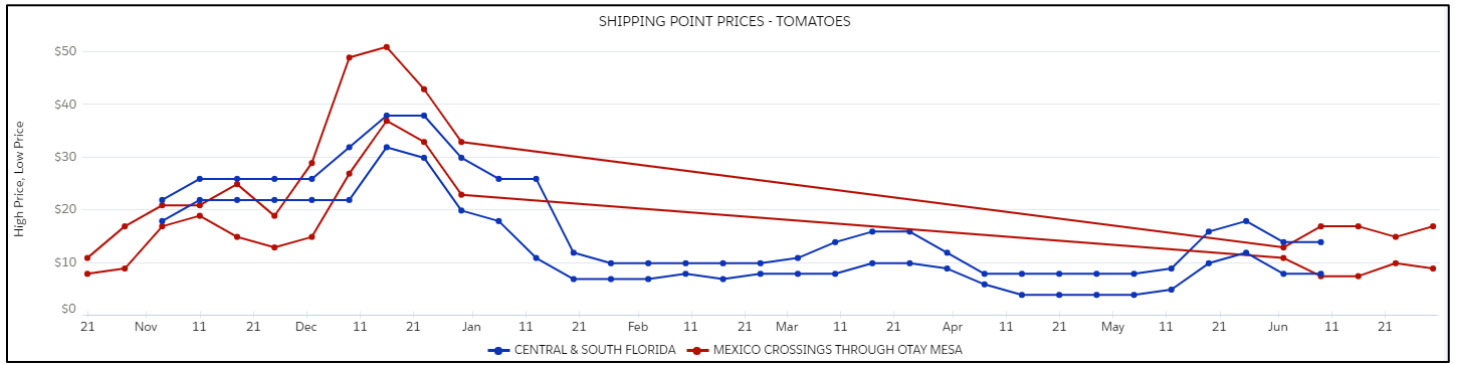


Figure 15: Tomato imports through California halt from late December through June.

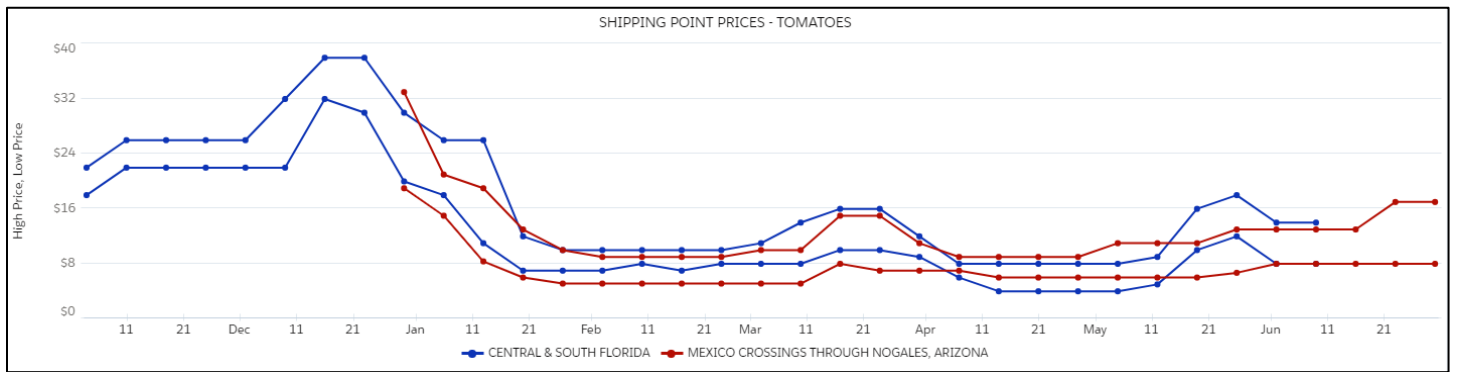
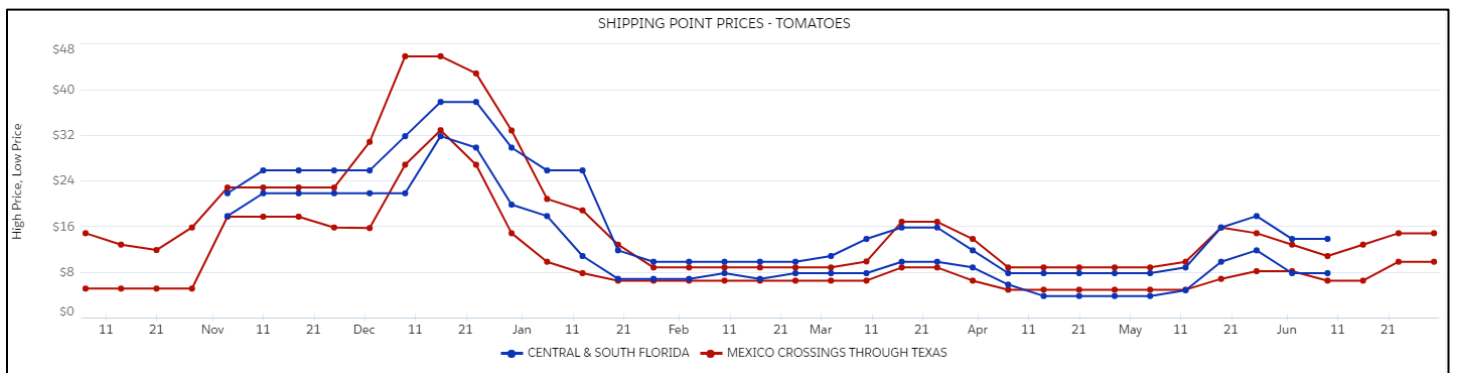
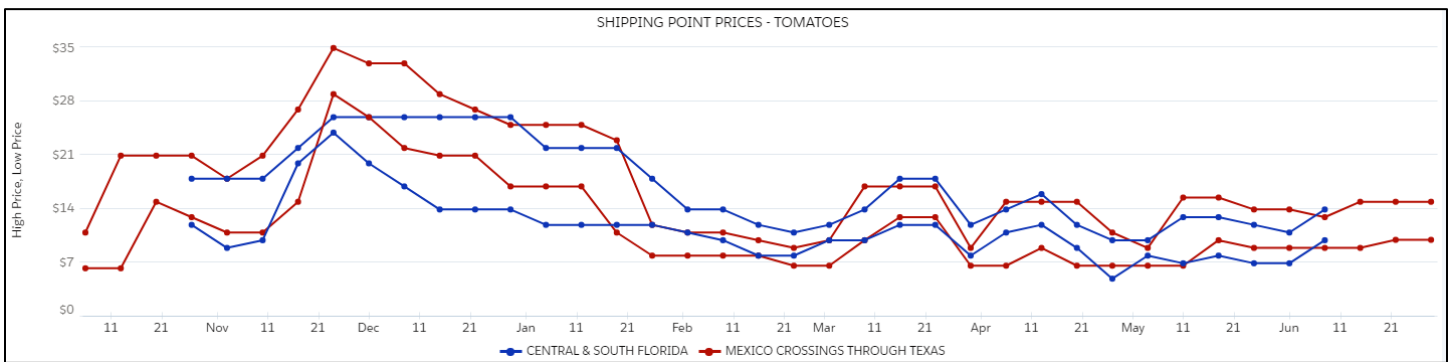
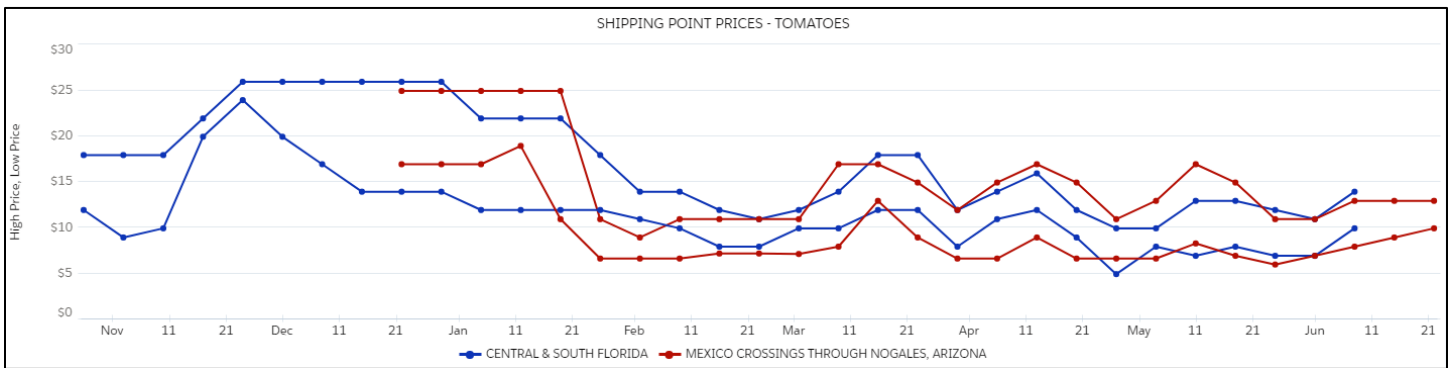
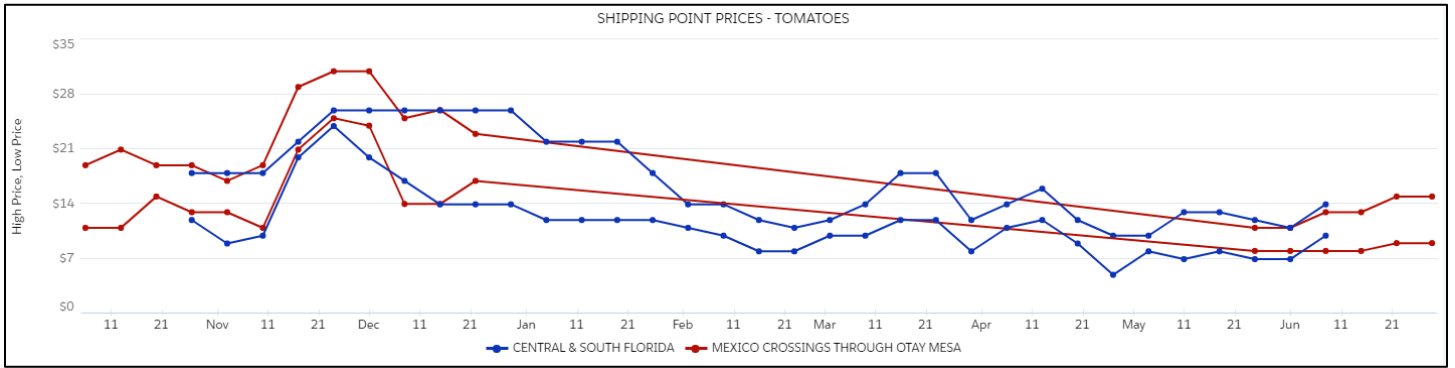


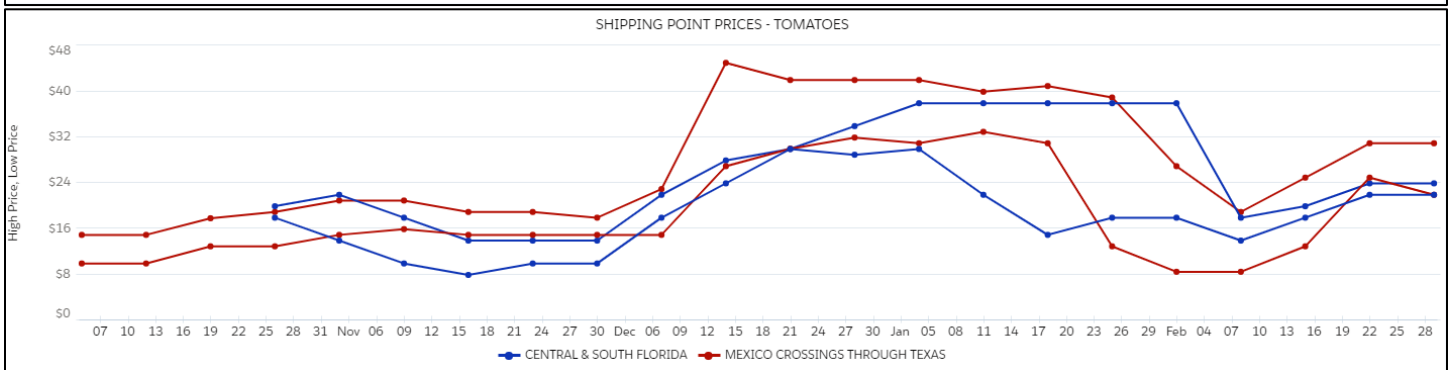
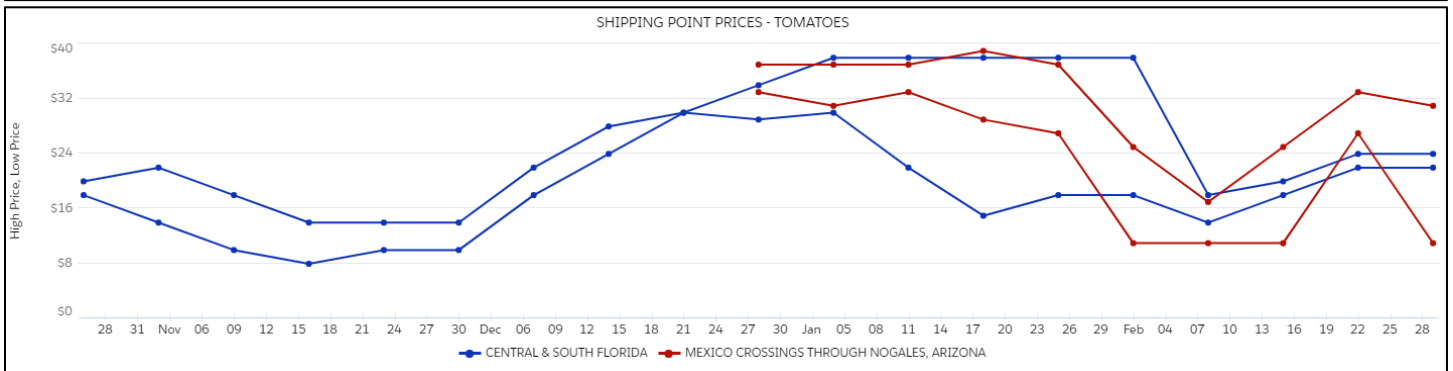
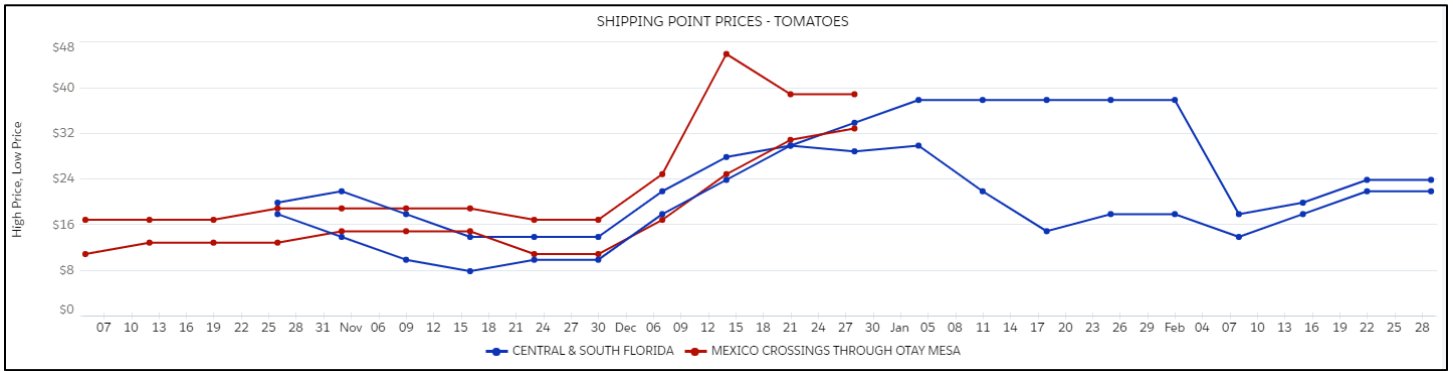
Figure 16: Prices of tomatoes imported through Arizona and Texas appear to track closely with the prices of Florida products. This is possibly a success story for the suspension agreement, as the prices of imports and domestically produced tomatoes track closely in the following charts.



2018-2019 Season

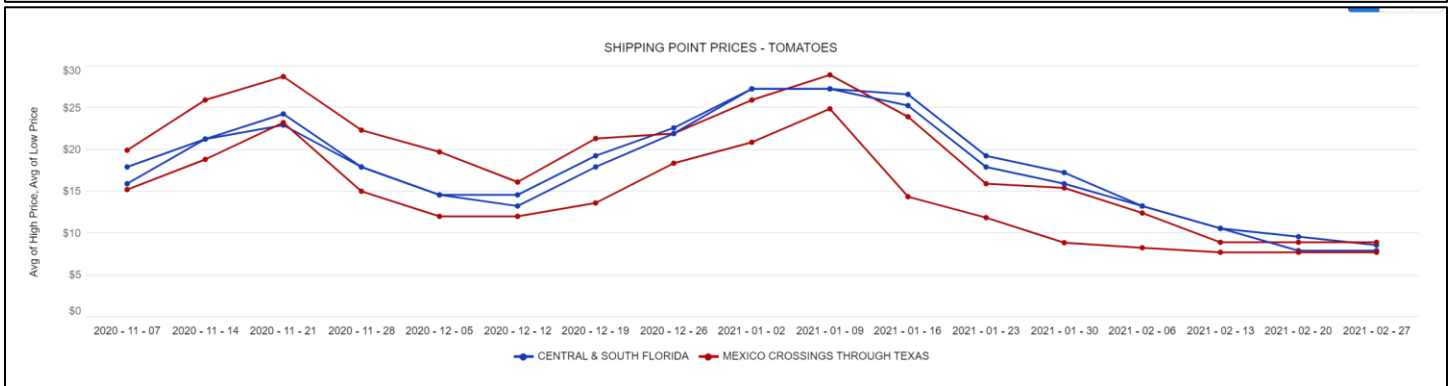
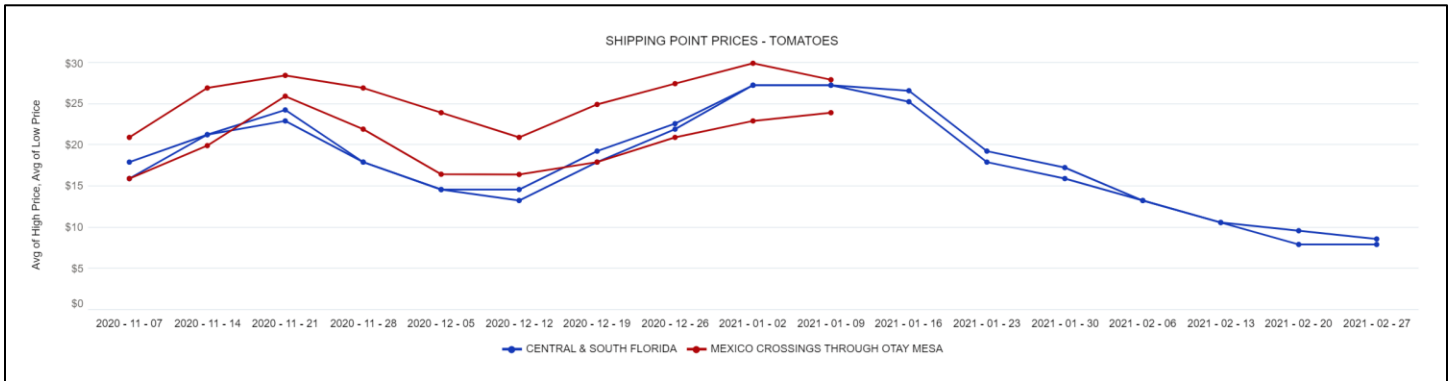
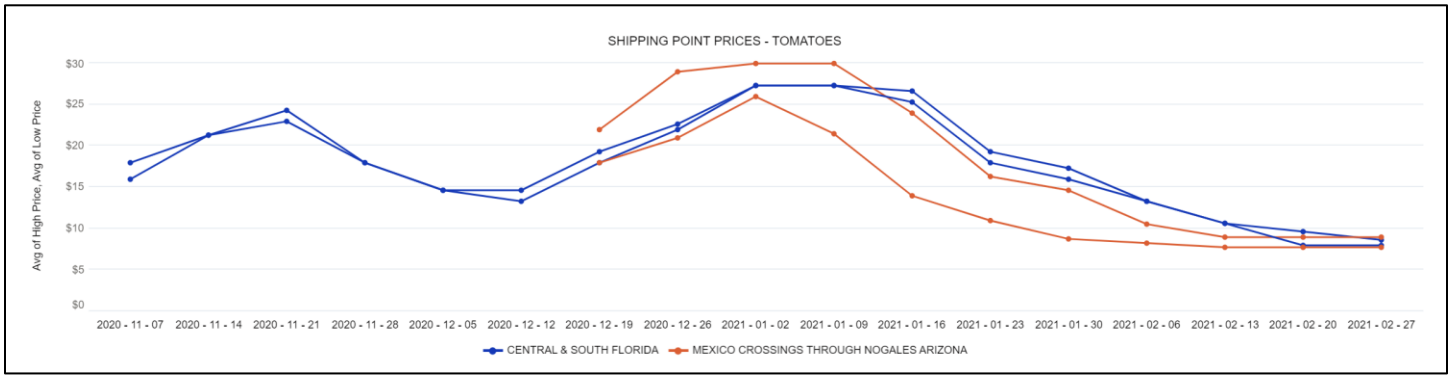


# 2019-2020 Season





# 2020-2021 Season

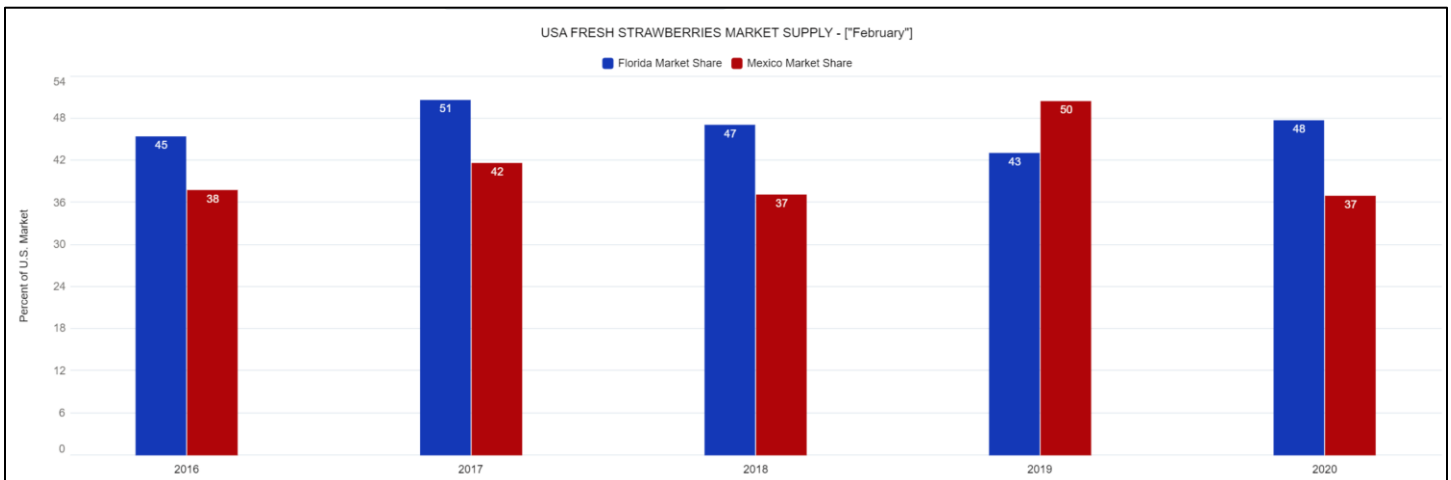
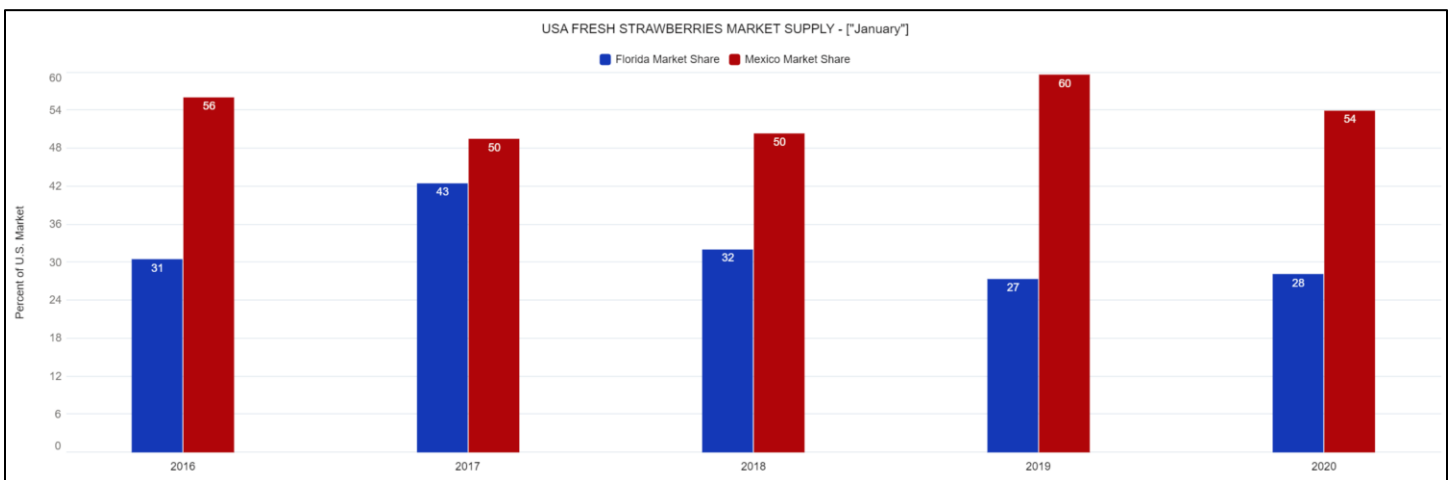


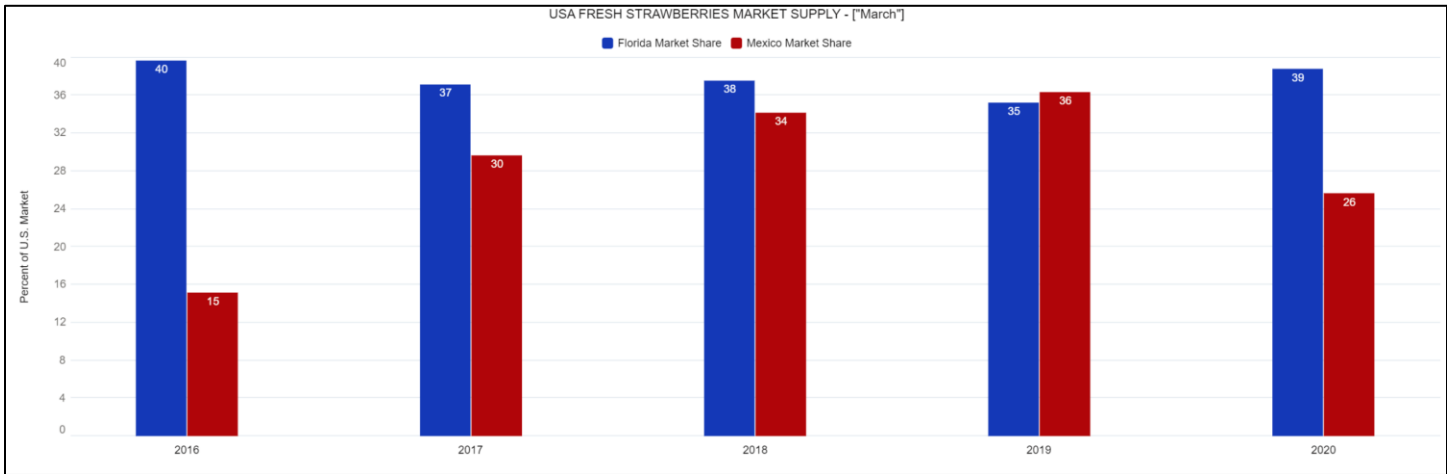
## STRAWBERRY Analytics/Market Share Shifts

Examining the fresh strawberry market's competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through February, Florida and Mexico provide 84% of the U.S. supply of strawberries, nearly 30 million cartons.

Average low shipping point price per flat for Florida berries from December through March of the years 2016 – 2021 was \$18.99. Mexican imports into the western U.S. through San Diego-Otay Mesa, average low price of \$16.09. The Mexican east coast prices (See price range Figure 1a-c and 7-8 in this section) skew towards the \$12-\$15 range, 20+% below the western U.S. average.

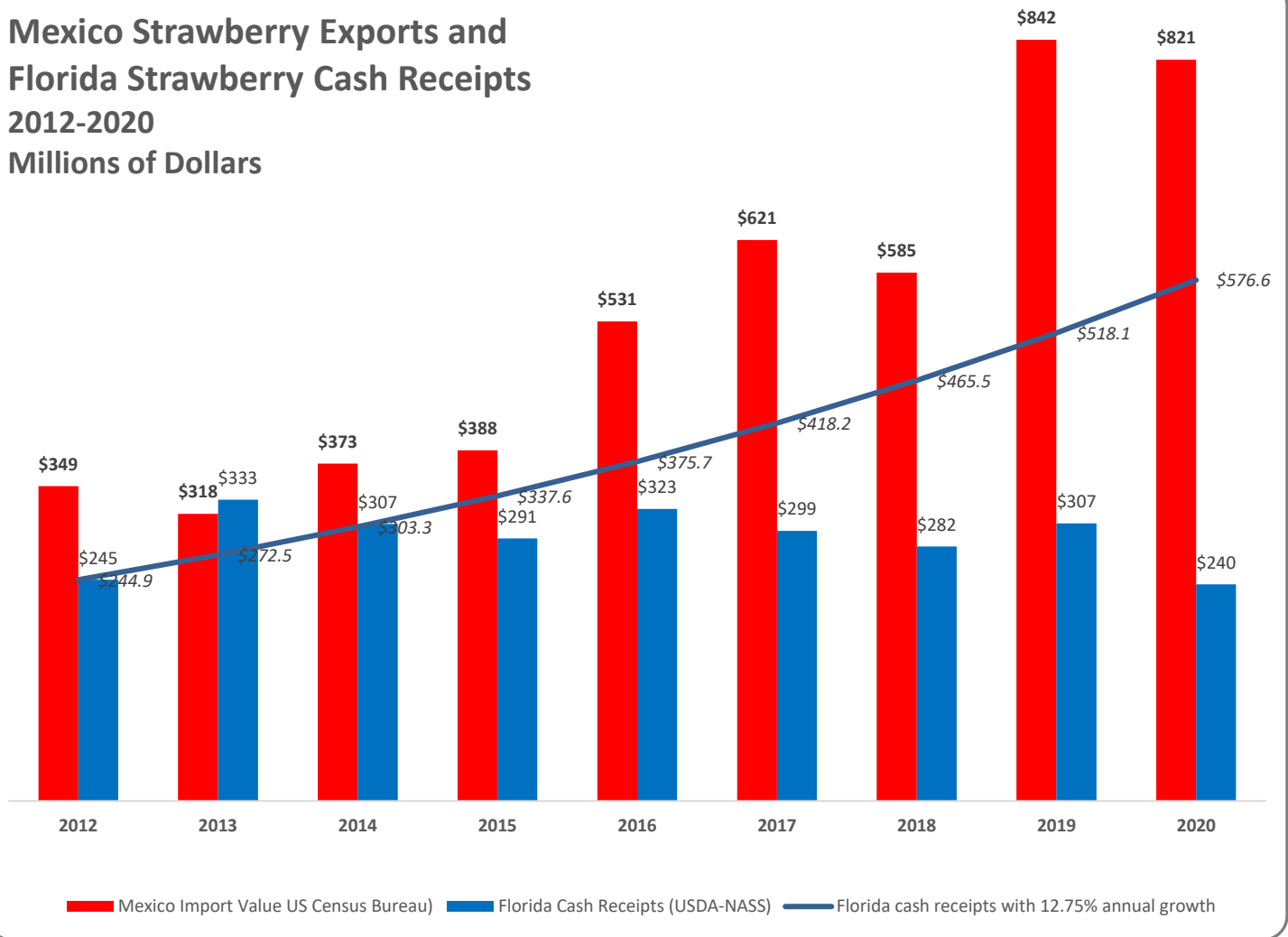
Mexican product imported through Texas destined for areas 500-2500 miles eastward, should see an increase in price as shipping adds from \$1.50-\$4 per unit, so above \$18.00, however, MX eastern low prices average \$12.61. In east coast areas, Mexican aggressively priced product in this range would force Florida product to charge similar prices minus shipping, effectively setting minimal entry price positions, reducing market share, revenues and profitability.





## Mexico Strawberry Exports and Florida Strawberry Cash Receipts 2012-2020

Millions of Dollars



The economic injury to Florida, is compounded by loss of growth of sales in addition to the losses estimated that occurred due to lower pricing on the previous chart.

- The value of Mexican imports to the U.S. grew 12.75% per year on average between 2012 and 2020 or 57.4% from 2012 to 2020.
  - Average sales (2012-2020) annually of \$563 million.
- Florida's average year-on-year growth during the same period was 0.9% and ended up -2.08% lower comparing 2012 to 2020.
  - Average cash receipts (2012-2020) annually of \$292 million.
- \$577 million; cash receipts in 2020 of Florida strawberries, if the growth rate (12.75% average annual) experienced by Mexico is applied to the value of production of Florida strawberries.

## Historical supply of Florida production and Mexican strawberry exports to the U.S.

Mexican exports remained between 60-100 million pounds from 2000-2005 then more product began flowing to the eastern U.S. beginning in 2006. By 2010, a new trend was emerging with significantly more Mexican product being shipped eastward across the U.S. Comparing the relative supply positions of Florida and Mexico; in 2000 (FL=66% v. MX=34%) and Mexico shipped 113 million pounds more in 2019 than did Florida. Total demand for the product expanded as well.

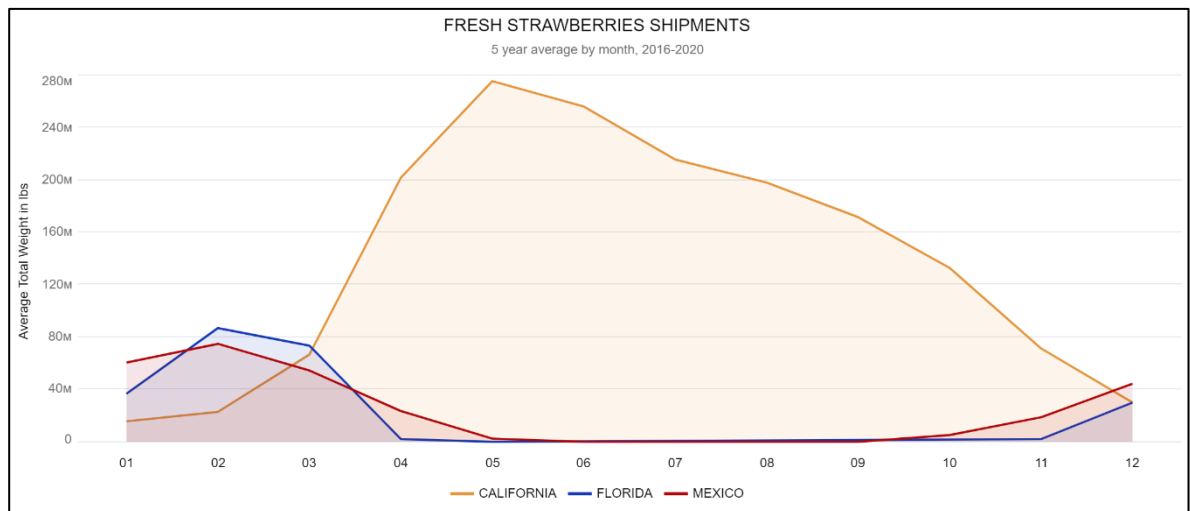
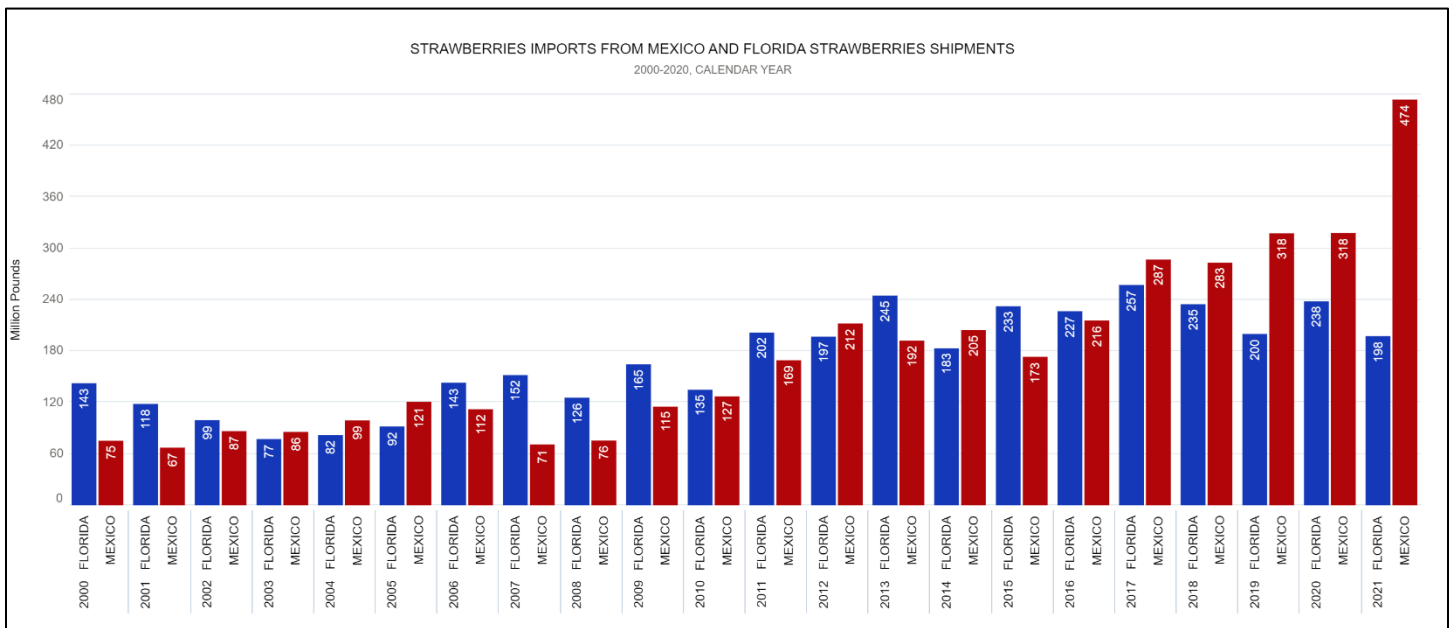
*\*Values on the graphs for 2021 were not used in calculations as only partial year values are currently available. 2021 values below are year to date shipments through July 2021.*

422%: Expansion of Mexican product from 2000 to 2020

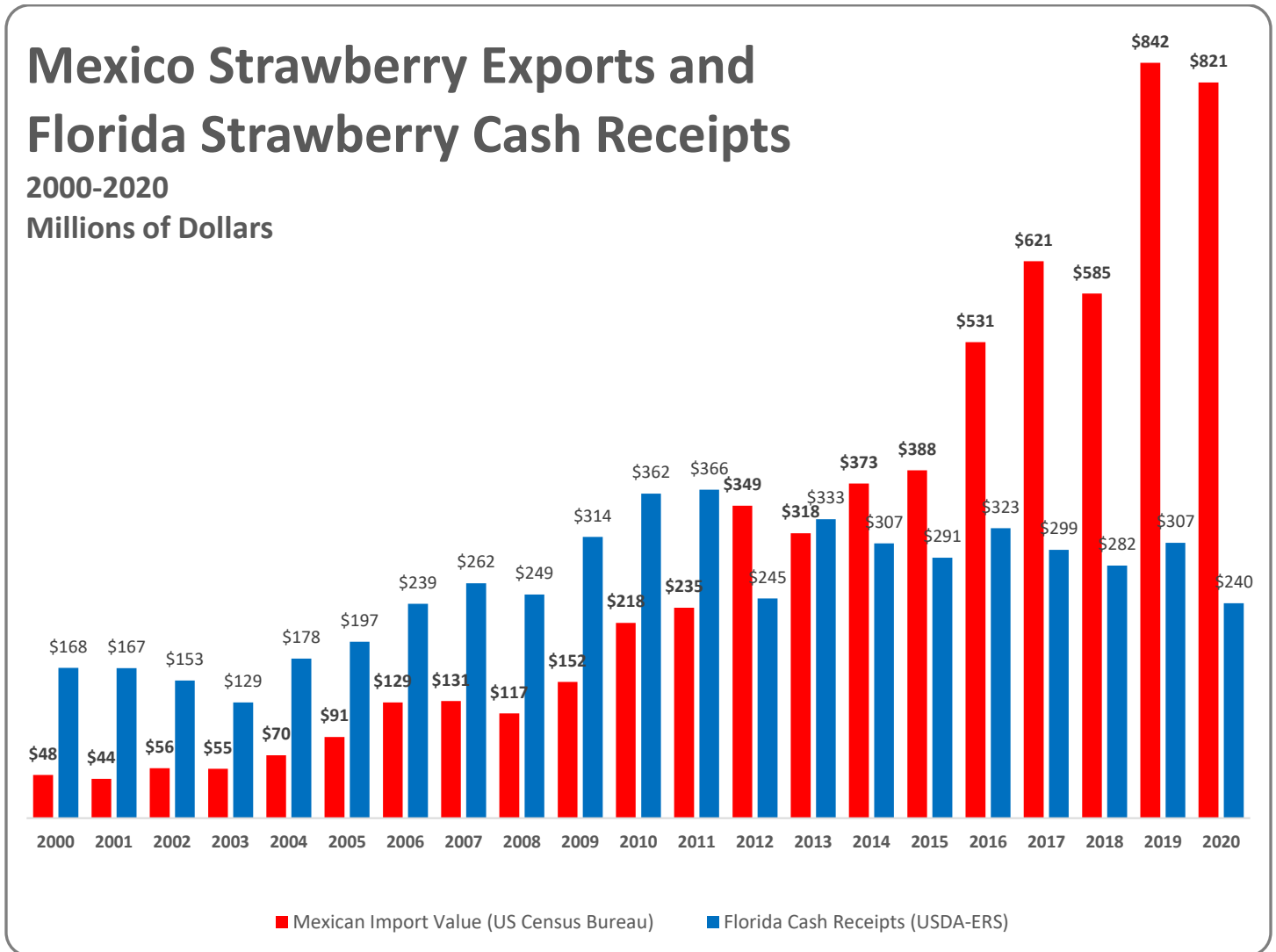
\$276 million: Mexican average number of pounds exported from 2015-2020

39%: Expansion of Florida product from 2000 to 2017

\$233 million: Florida average number of pounds produced from 2015-2020



**Historical value of Florida production and Mexican strawberry exports to the U.S.**



1,610% : Expansion of the value of Mexican product from 2000 to 2020

\$631 million: Mexican average value exported from 2015-2020

30%: Expansion of the value of Florida product from 2000 to 2020

\$290 million: Florida average production value from 2015-2020

## Historical Pricing strategy and relative high-low ranges of Florida, California, and Mexico

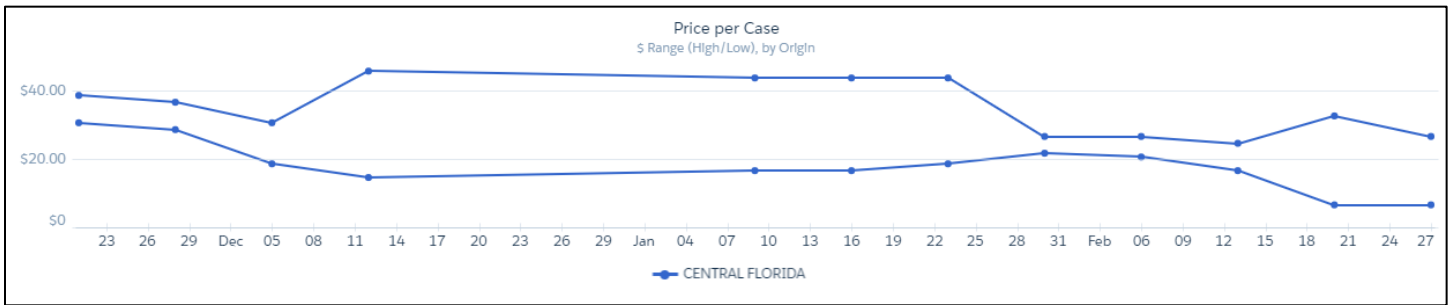


Figure 1a: Strawberry case price range, 2015-2016 season, Florida product only.

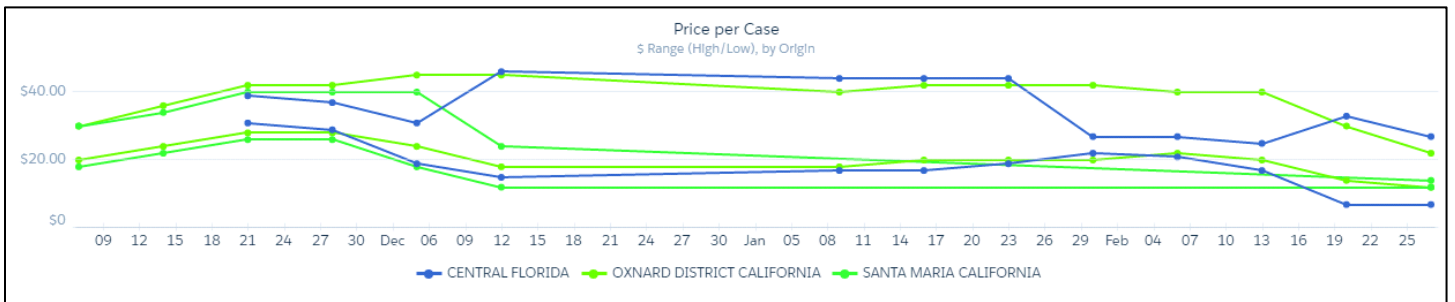


Figure 1b: 2015-2016 season, Florida prices compared with product from California; the two states exhibit similar ranges.

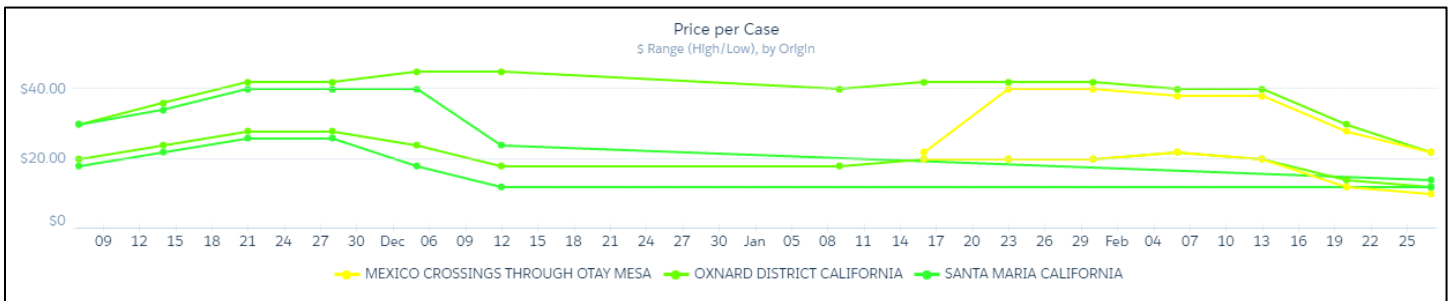


Figure 1c: California prices compared with prices of Mexican product entering California; Mexico and California prices closely mirror each other; this is not indicative of a competitively fluid market.

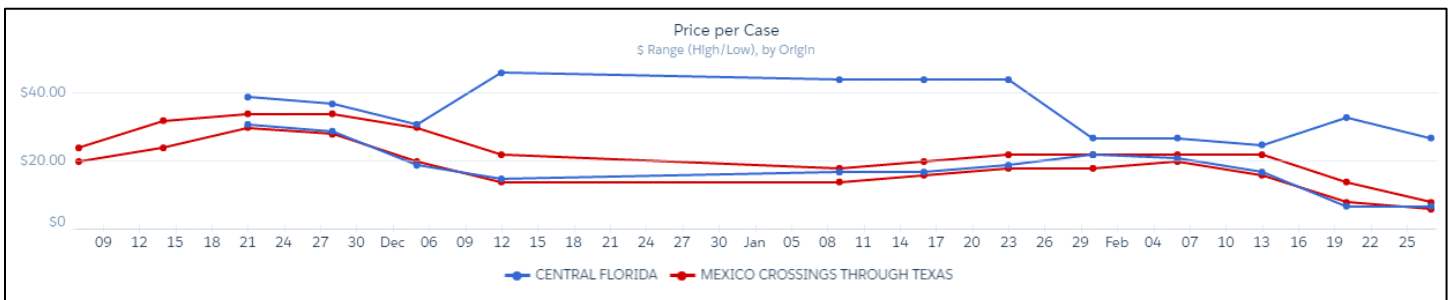


Figure 1d: Florida prices compared with Mexican imports to the eastern U.S.; Mexican prices have a much narrower price range, are consistently skewed toward the lower pricing range of Florida and the product must be shipped farther across the U.S. These distances range from: 600 miles to New Orleans, 900 to St. Louis, 1200 to Orlando and Chicago and 1700 to New York.

The same type of pricing strategy appears to be utilized in the following year.

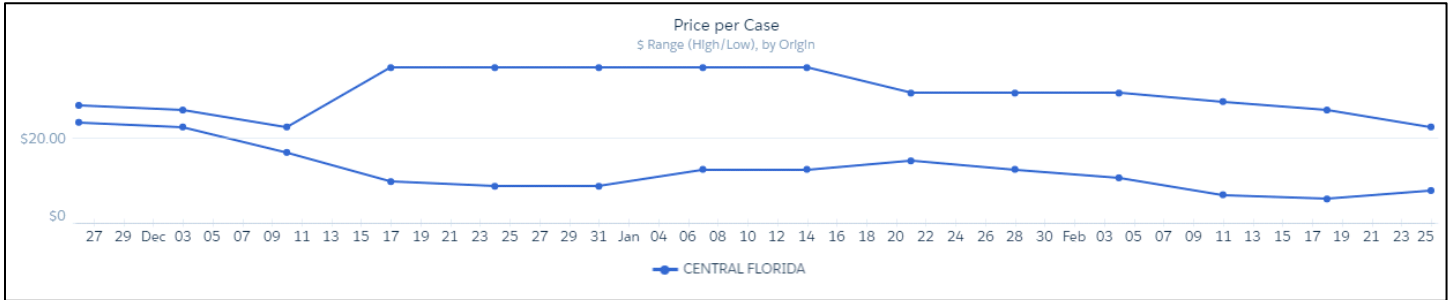


Figure 1: Strawberry case price range, 2016-17 season, Florida product only.

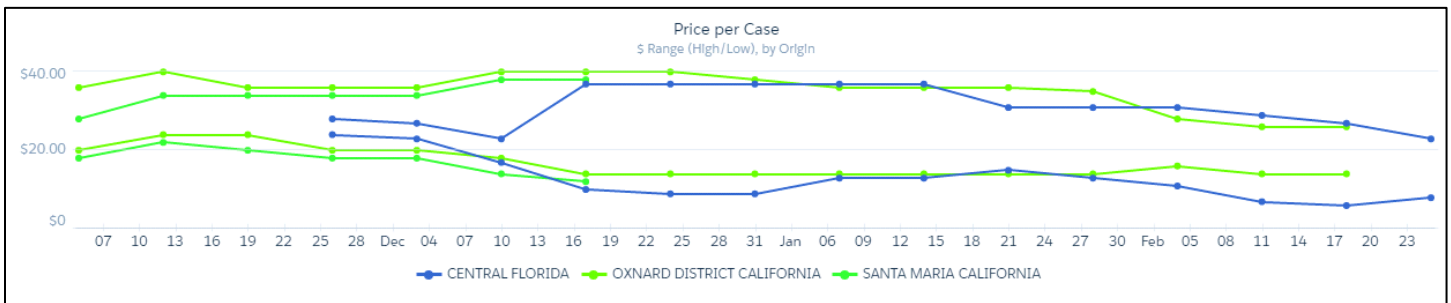


Figure 2: Florida price range, as above, compared with California product.

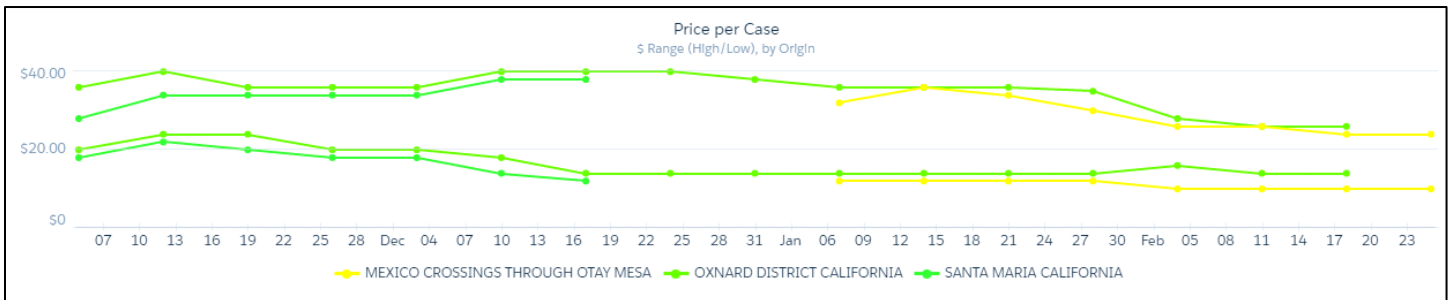


Figure 3: California product compared with Mexican imports entering California.

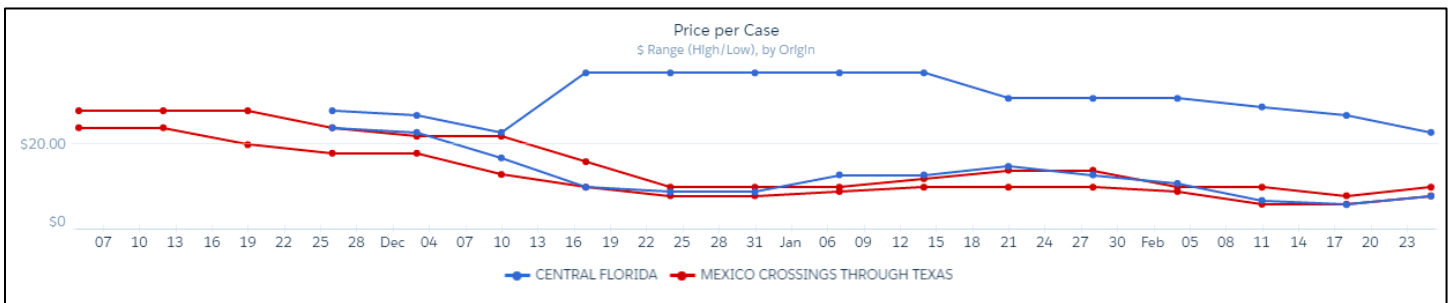


Figure 4: Florida prices compared with Mexican imports to eastern U.S.



## 2017-2018 Season

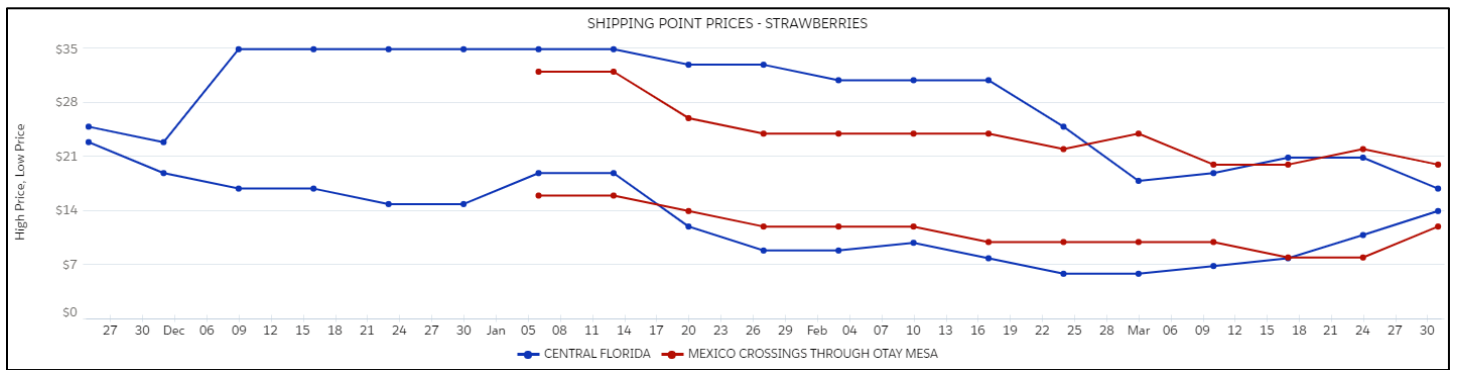


Figure 17: Prices of Florida strawberries compared with imports from Mexico entering California.

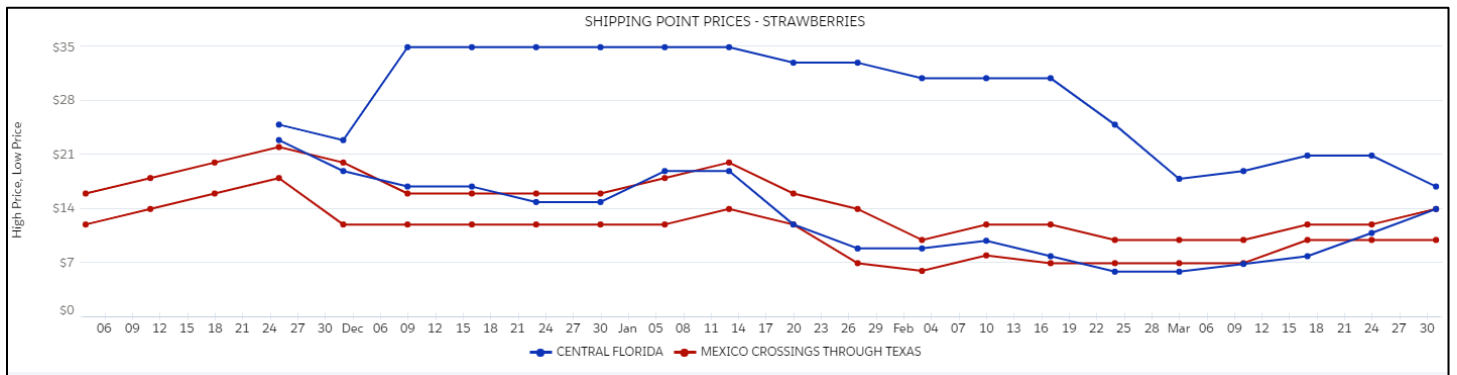


Figure 18: Florida strawberry prices compared with imports from Mexico entering Texas, presumably to be shipped to the eastern or midwestern U.S. The range of prices is much narrower for product entering the U.S. through Texas and skewed toward the minimum price. No significant differences in size, grade, or packaging were reported to account for the difference in price.

## 2018-2019 Season

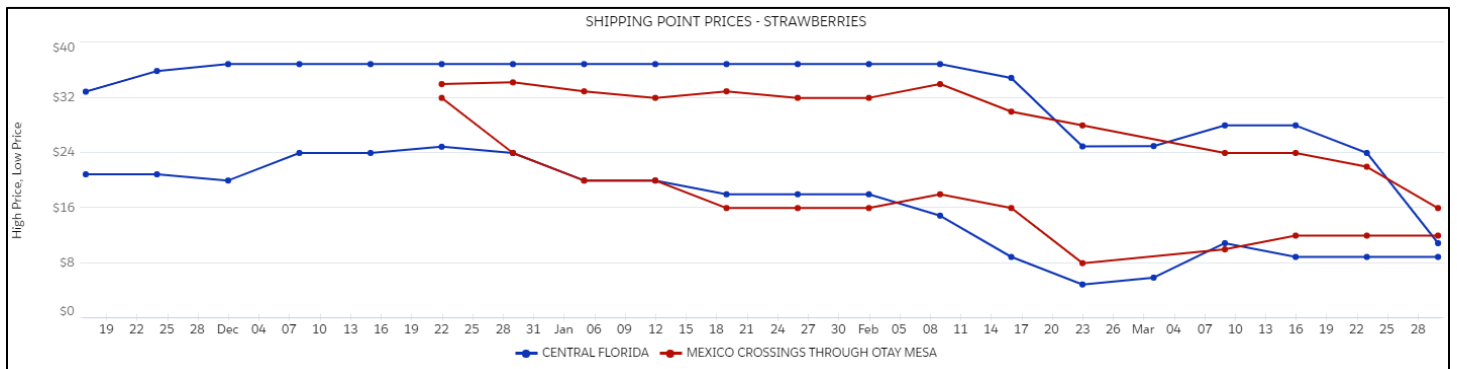


Figure 19: The same differences in price were seen during the 2018-2019 season. The vast majority of product shipped from both origins is medium size, and there were no differences in packaging or grade. Price range for products entering California is approximately \$8 - \$34.

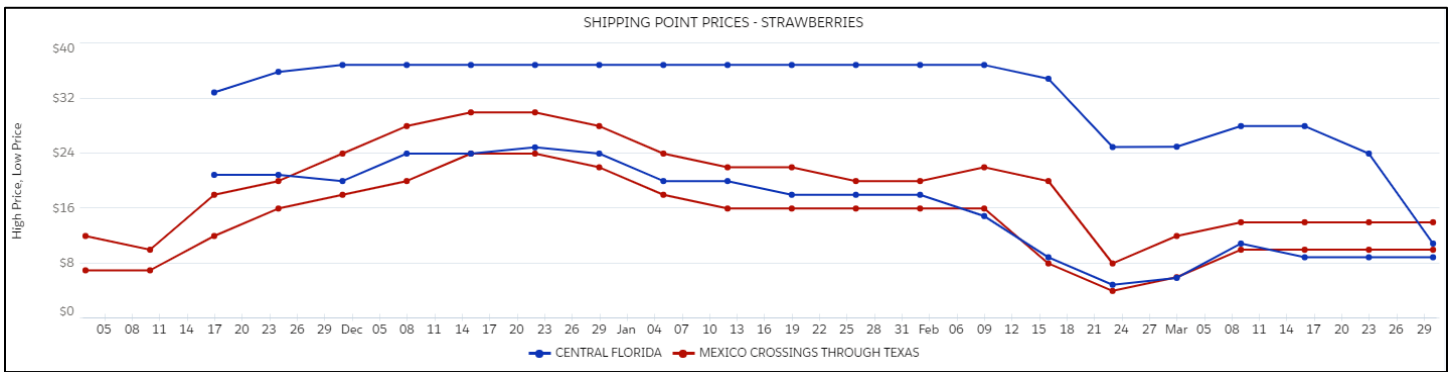


Figure 20: Strawberries imported from Mexico into Texas show a much narrower price range which is skewed toward the range minimum. Range through Texas is approximately \$6-\$30, with most high prices around \$20-\$22.

### 2019-2020 Season

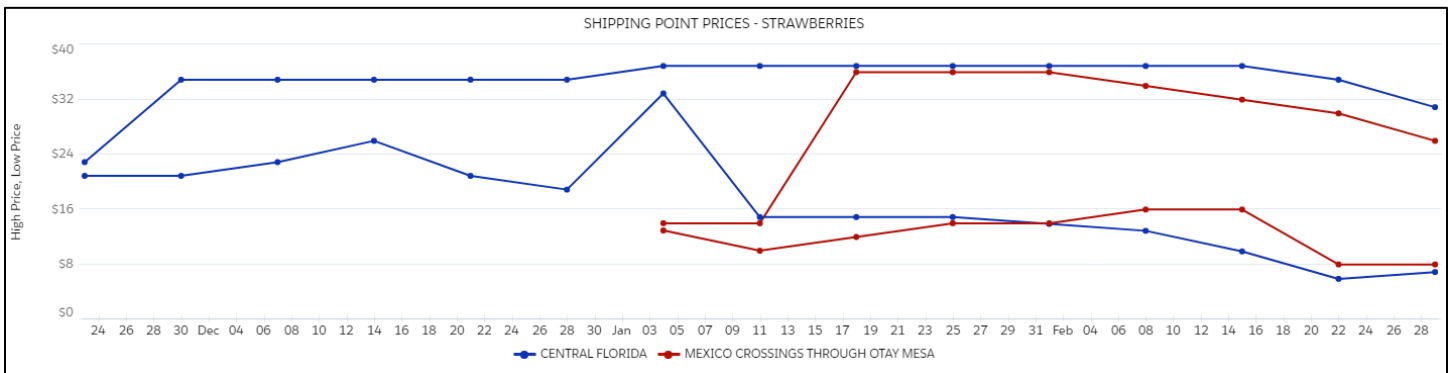


Figure 21: During the 2019-2020 season, imports through California began later and were priced from \$12-\$32 per flat – much higher than product imported through Texas.

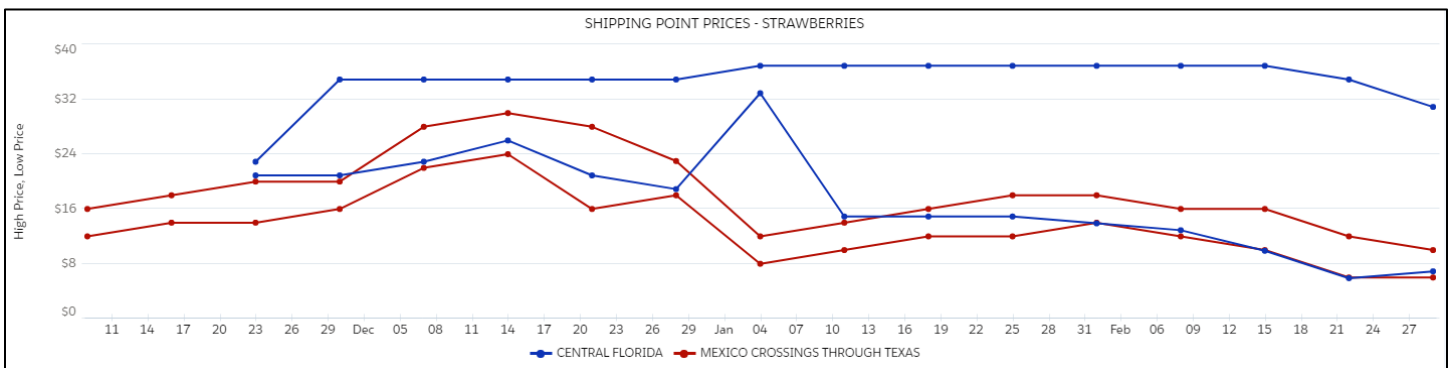


Figure 22: Prices for strawberries imported through Texas were priced from \$10-\$17 per flat, while product imported through California at the same time was priced \$12-\$32 per flat.

## 2020-2021 Season

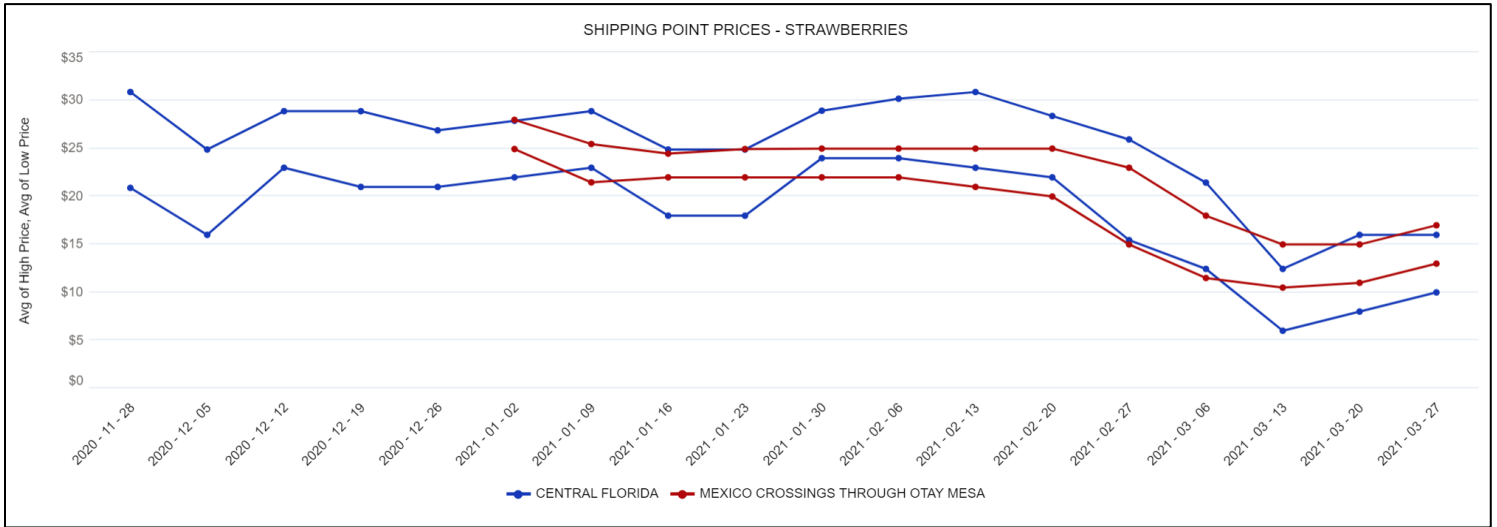


Figure 13: During the 2020-2021 season, imports through California began later and were priced from \$24-\$28 per flat – much higher than product imported through Texas.

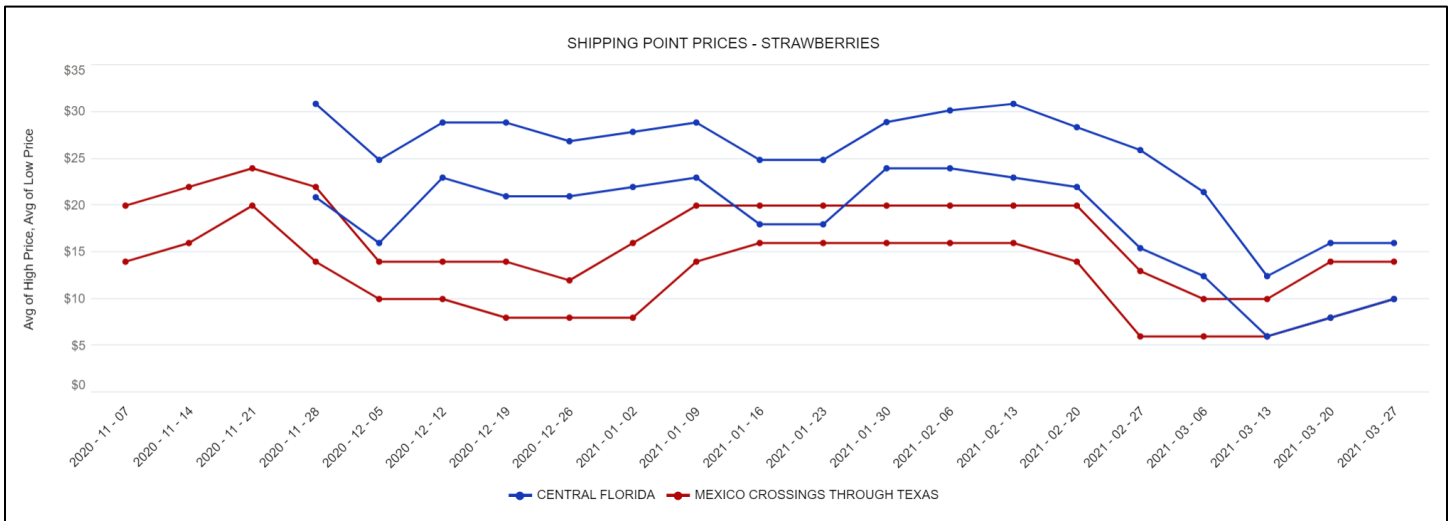


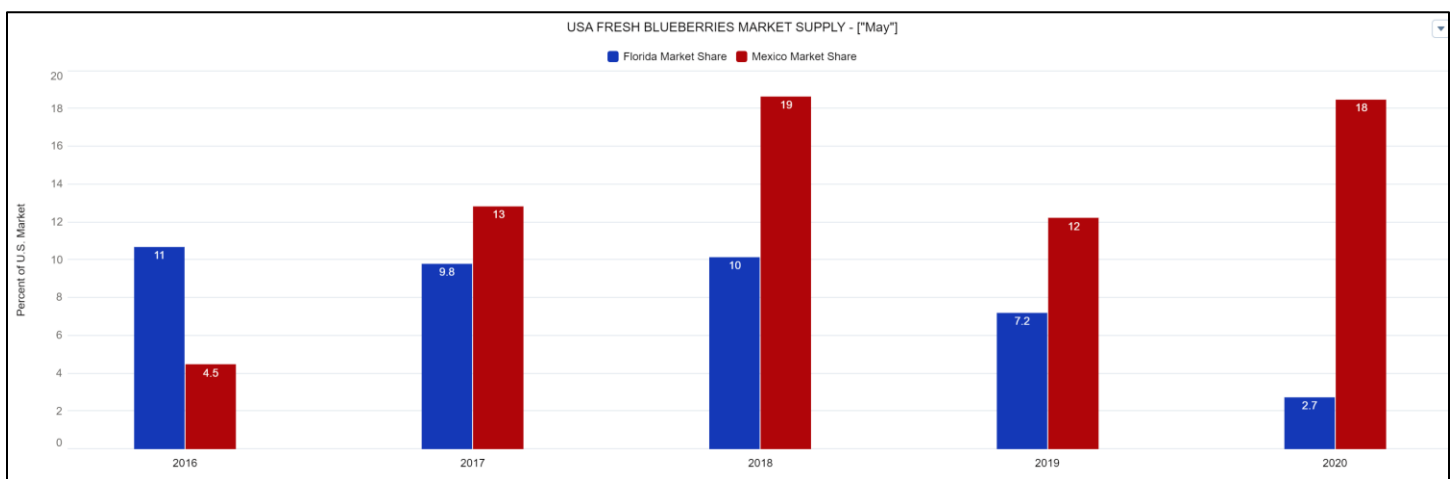
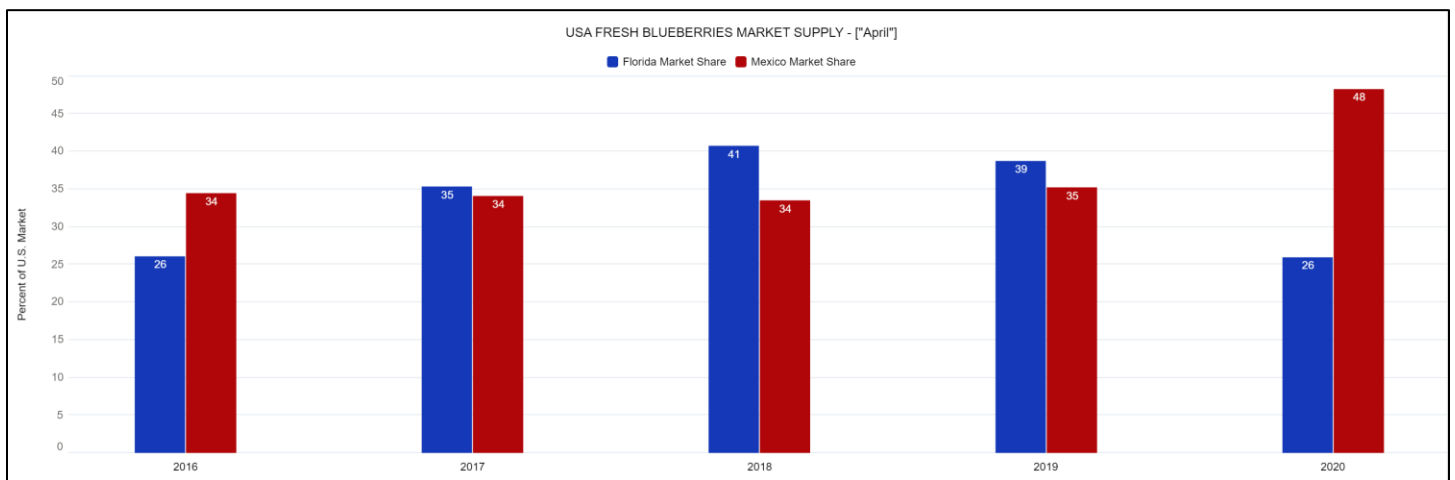
Figure 14: Prices for strawberries imported through Texas were priced from \$8-\$16 per flat, while product imported through California at the same time was priced \$24-\$28 per flat.

## BLUEBERRY Analytics/Market Share Shifts

Examining the fresh blueberry market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From April - May, Florida and Mexico provide 41% of the U.S. supply of blueberries, about 4.1 million flats between the two regions.

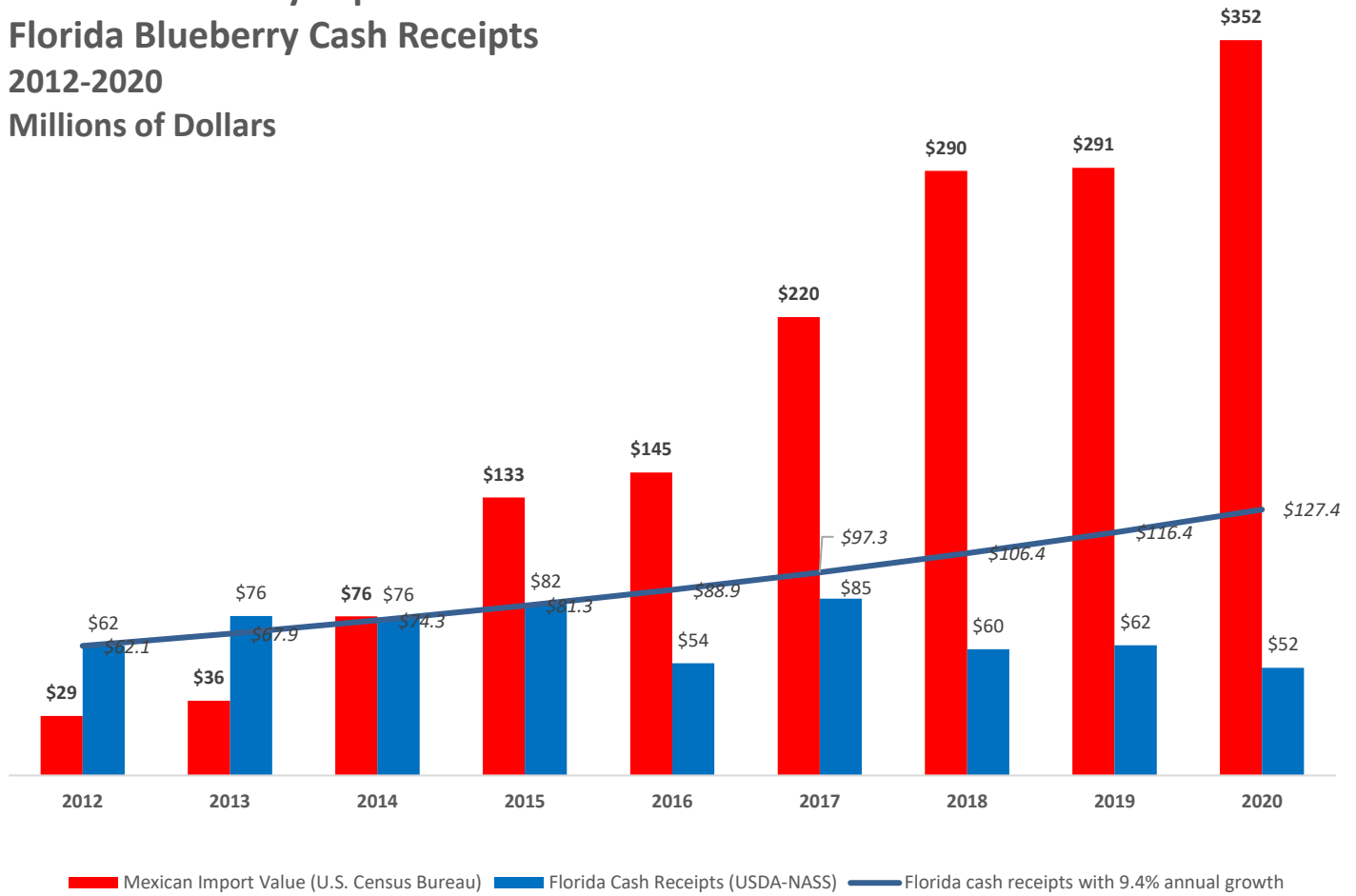
Florida product averaged \$23.64 per flat between 2015 and 2020 and Mexican averaged \$24.72, near parity. Mexican pricing skews to the lowest reported prices during April and May, Figure 40-42 reports Mexico's low range at approximately \$10-15 per flat, these prices would be 50% below their average.

Aggressively priced Mexican product continuously in the lower ranges imported through Texas destined for areas 500-2500 miles eastward, should see an increase in price as shipping adds from \$1.50-\$4 per carton. In east coast areas, Mexican aggressively priced product in this range would force Florida product to charge similar prices minus shipping, effectively setting minimal entry price positions, reducing market share, revenues and profitability.



## Mexico Blueberry Exports and Florida Blueberry Cash Receipts 2012-2020

Millions of Dollars



The economic injury to Florida, is compounded by loss of growth of sales in addition to the losses estimated that occurred due to lower pricing on the previous chart.

- The value of Mexican imports to the U.S. grew 1,114% from 2012 to 2020. Average annual growth was 41%
  - MX average sales (2014-2020) annually of \$174.5 million.
- Florida’s blueberry sales decreased by 16.1% during the same period.
  - FL average cash receipts (2014-2020) annually of \$67.6 million.
- \$127.4 million: Estimate of Florida 2020 blueberry cash receipts if Florida market share in 2020 had been same as in 2012.

## Historical supply of Florida production and Mexican blueberry exports to the U.S.

Mexican exports remained relatively minor from 2000-2009, when an accelerated expansion of product began flowing into the US. Growth in Florida blueberry production shows signs of injury by 2011, which continues as Mexican product achieves parity with Florida in 2014. Continued saturation from Mexico appears to have damaged Florida's market. Comparing the relative supply positions of Florida and Mexico; in 2007 (FL=31% v. MX=0%) and they are reversed by 2017 (MX=25%; FL 16%). Total demand for the product expanded as well.

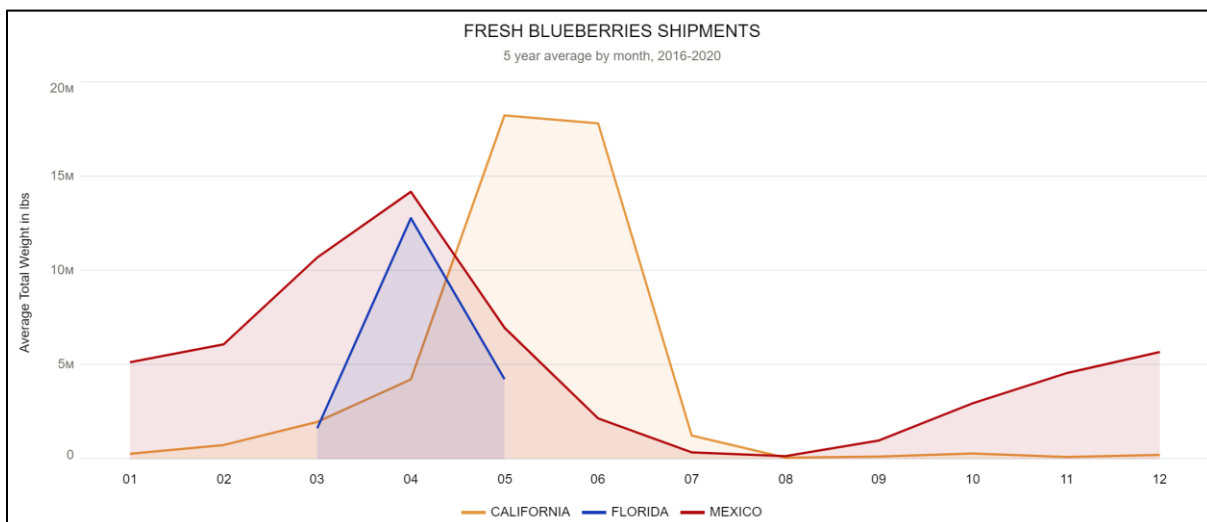
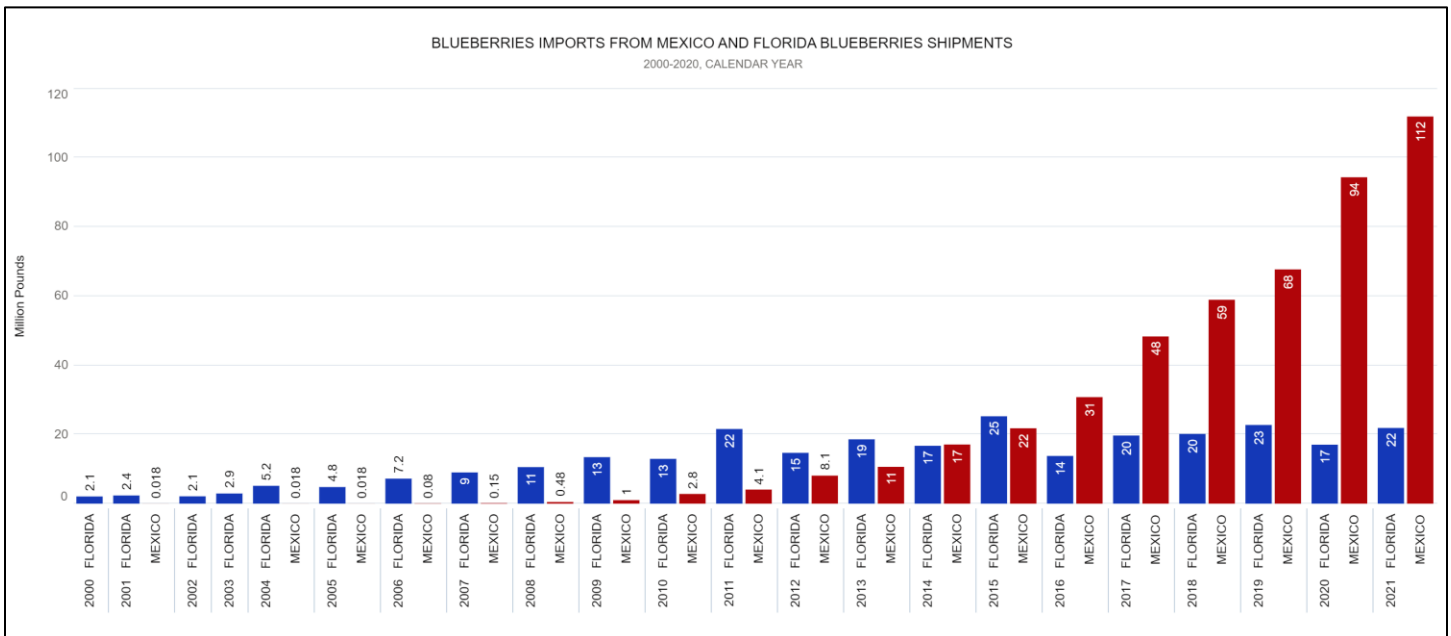
\*Values on the graphs for 2021 were not used in calculations as only partial year values are currently available. 2021 values below are year to date shipments through July 2021.

2,177%: Expansion of Mexican product from 2010 to 2020

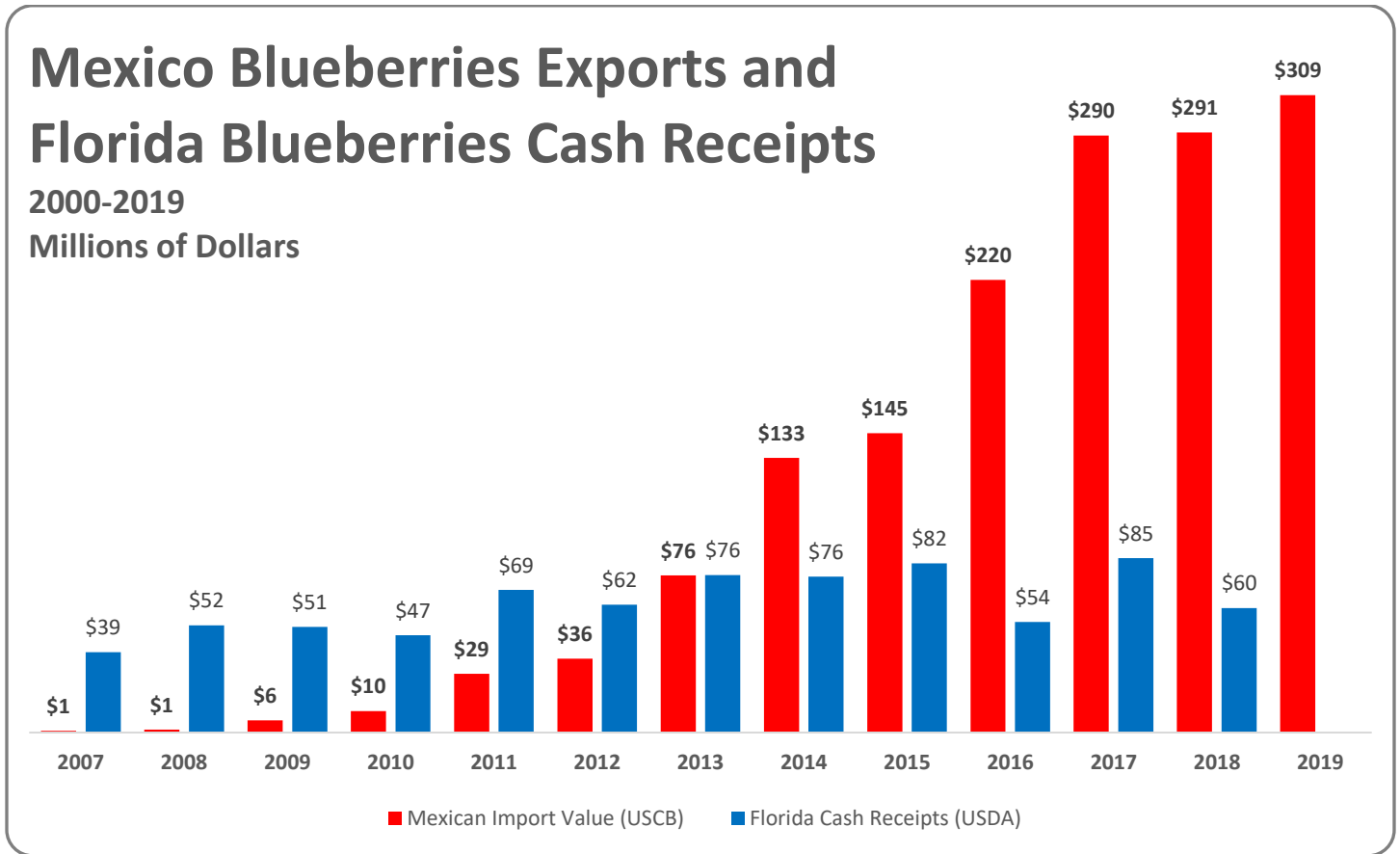
\$58.2 million: Mexican average number of pounds exported from 2015-2020

77%: Expansion of Florida product from 2010 to 2019

\$20.0 million: Florida average number of pounds produced from 2015-2020



**Historical value of Florida production and Mexican blueberry exports to the U.S.**



132%: Expansion of the value of Mexican product from 2014 to 2018

\$251 million: Mexican average value exported from 2014-2018

-27%: Decrease in the value of Florida product from 2014 to 2018

\$71.4 million: Florida average production value from 2014-2018

## Historical Pricing strategy and relative high-low ranges of Florida, Georgia, North Carolina, and Mexico

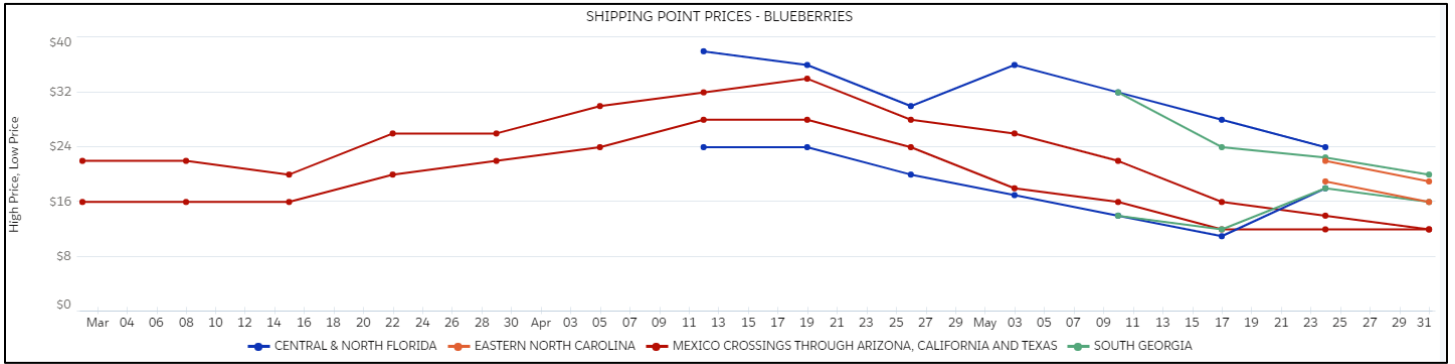


Figure 23: 2014 Florida blueberry season, shipping point prices of product from Florida, Mexico, Georgia, and North Carolina.

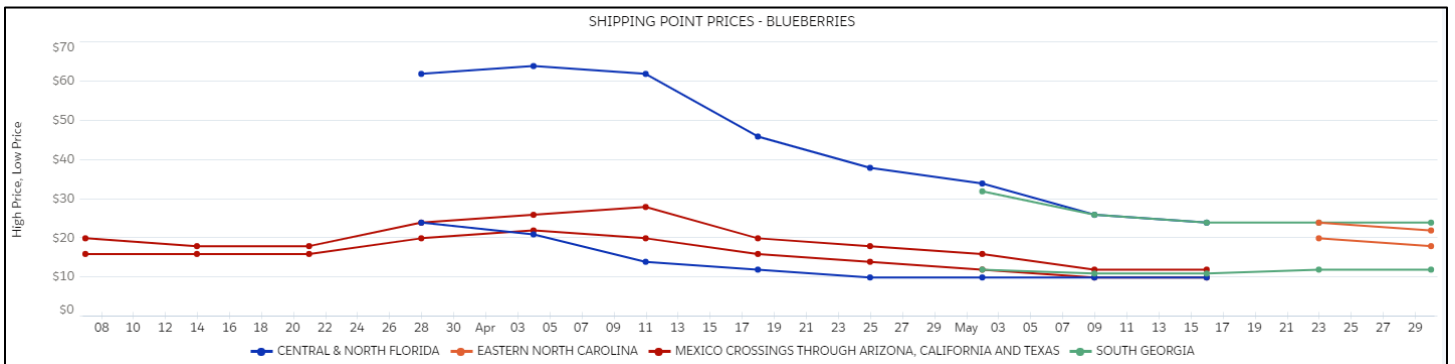


Figure 24: 2015 Florida blueberry season.

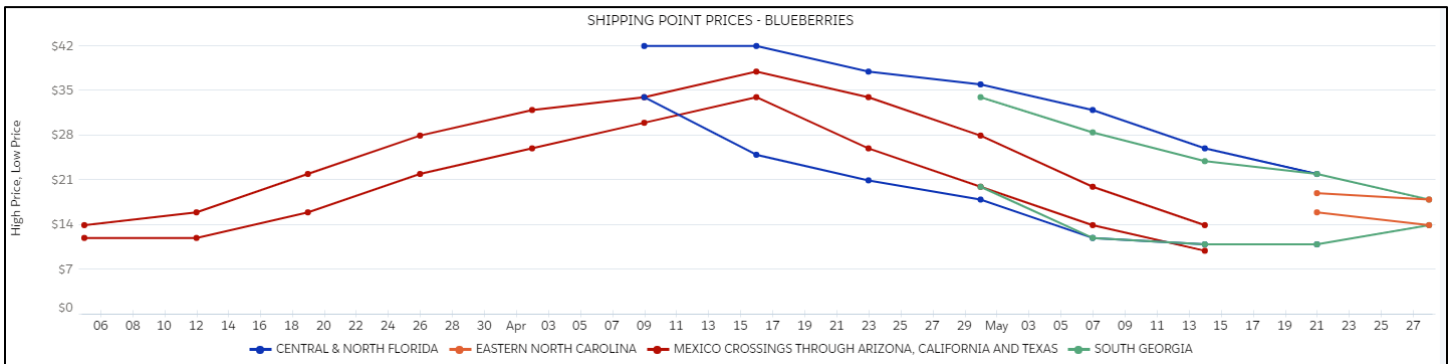


Figure 25: 2016 Florida blueberry season.



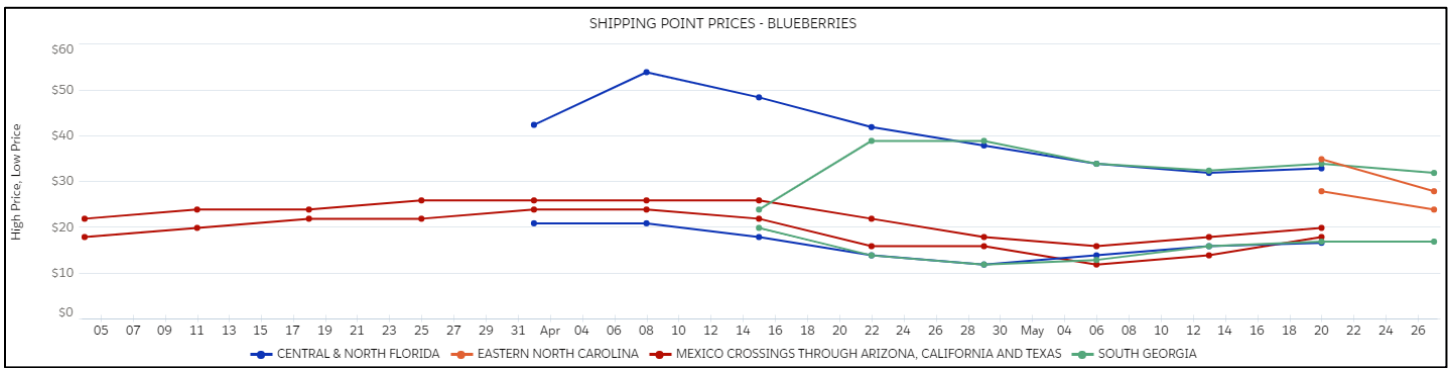


Figure 26: 2017 Florida blueberry season, shipping point prices of Florida, Georgia, North Carolina, and Mexico origin blueberries. Blueberry imports from Mexico are consistently priced in a narrow range at the lower end of the general price range. This condition continues through the 2018 and 2019 seasons, as seen below.

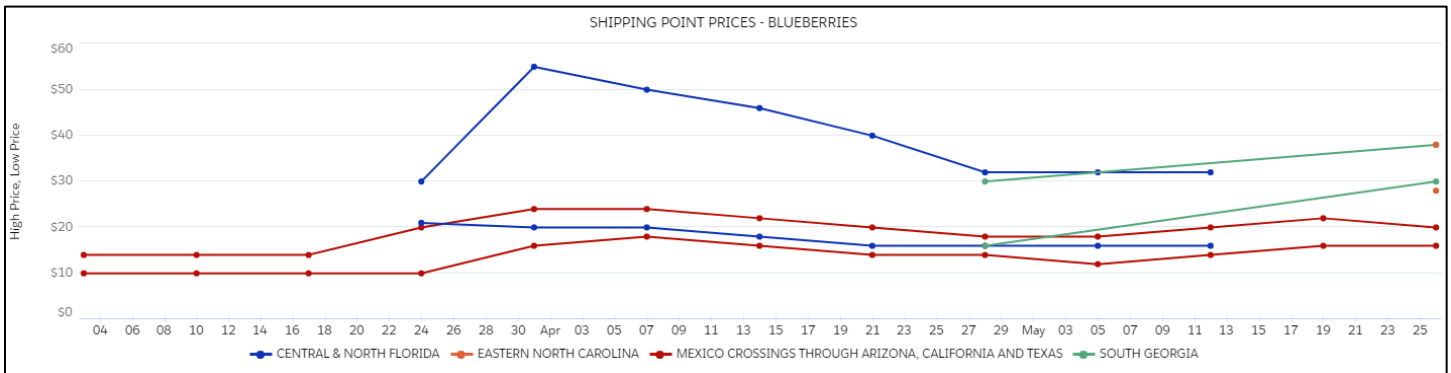


Figure 27: 2018 Florida blueberry season, shipping point prices of Florida, Georgia, North Carolina, and Mexico origin blueberries.

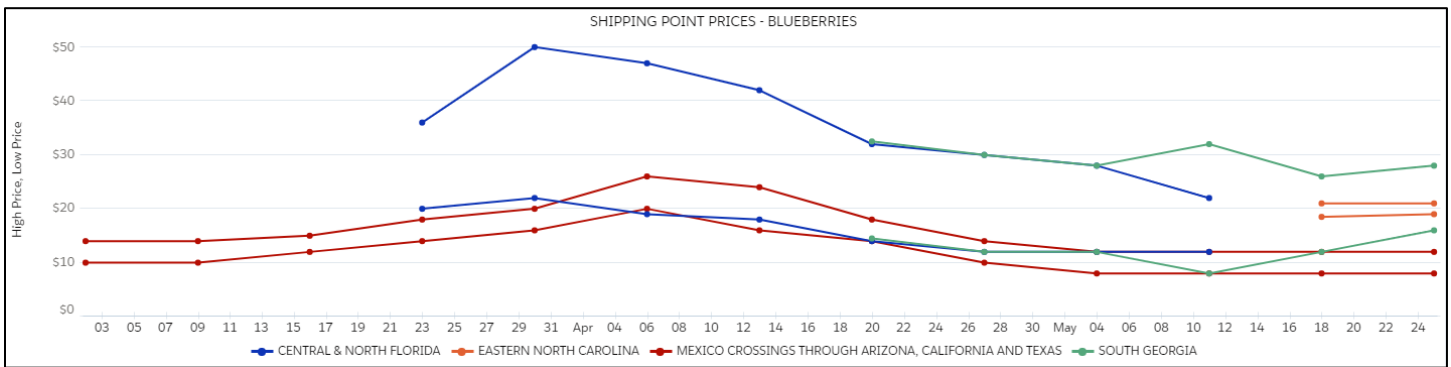


Figure 28: 2019 Florida blueberry season, shipping point prices of Florida, Georgia, North Carolina, and Mexico origin blueberries.

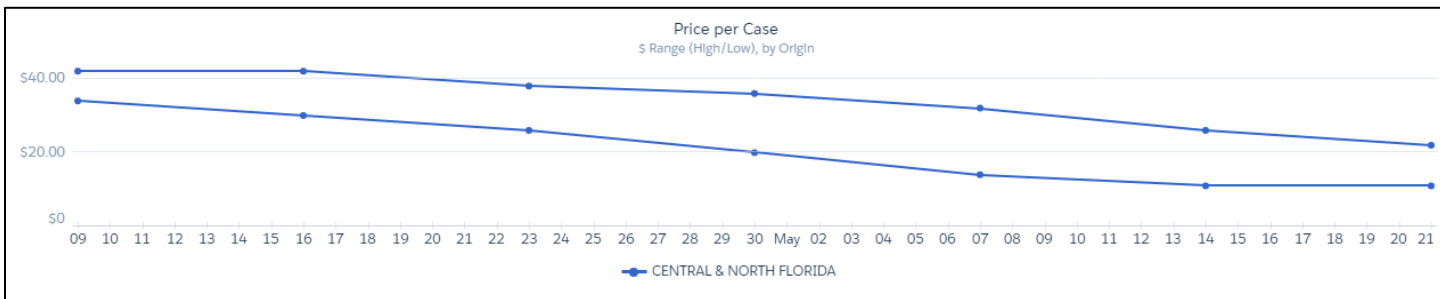


Figure 29: Blueberry pricing (per flat of 12 containers...either 4.4 oz, 6 oz, or 1 pt. for Florida product only from 4/1/16 through 6/30/16, roughly Florida's entire production window for blueberries.

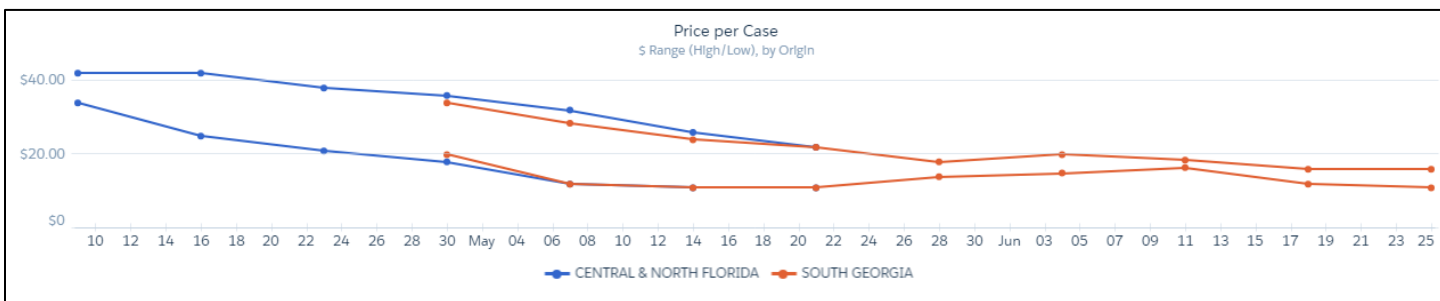


Figure 30: Florida and Georgia prices compared. Georgia product begins shipping toward the end of Florida's production season and maintains roughly the same range of price while the two are in competition.

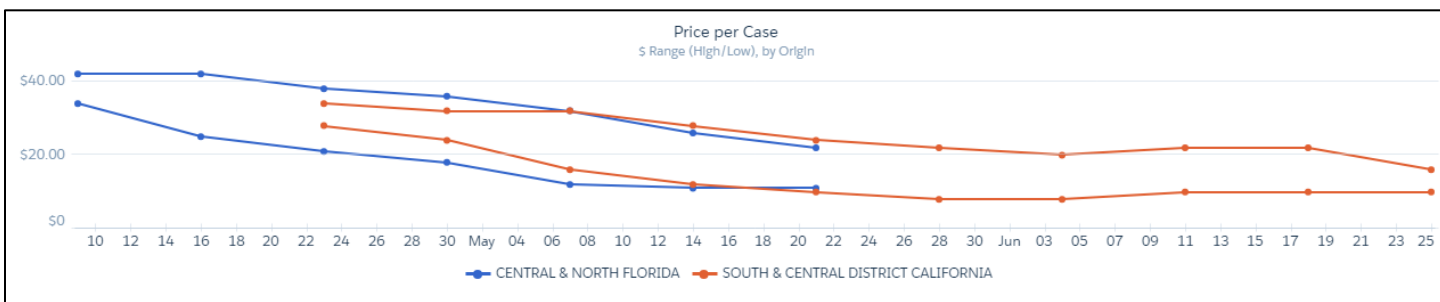


Figure 31: Florida pricing compared with product shipping from California. Product from both regions is priced similarly.

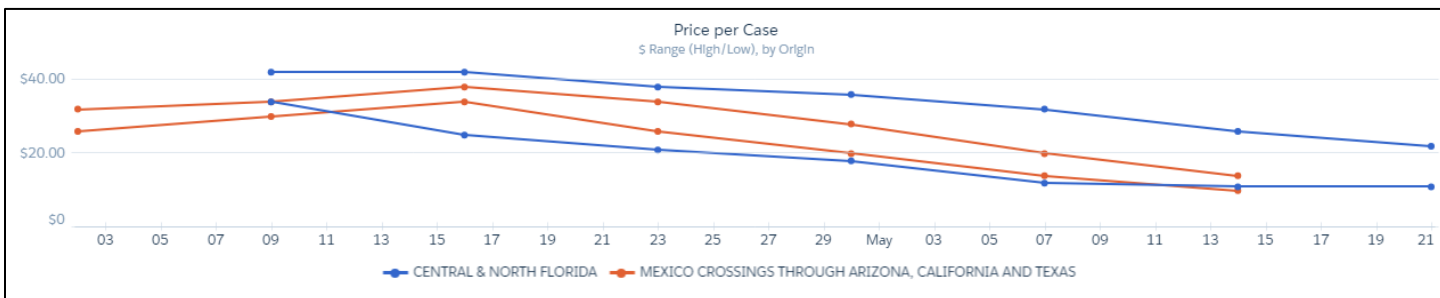


Figure 32: Florida prices compared to product imported from Mexico. Mexican product is priced consistently within a narrower range and skewed toward the low end of Florida's pricing range.

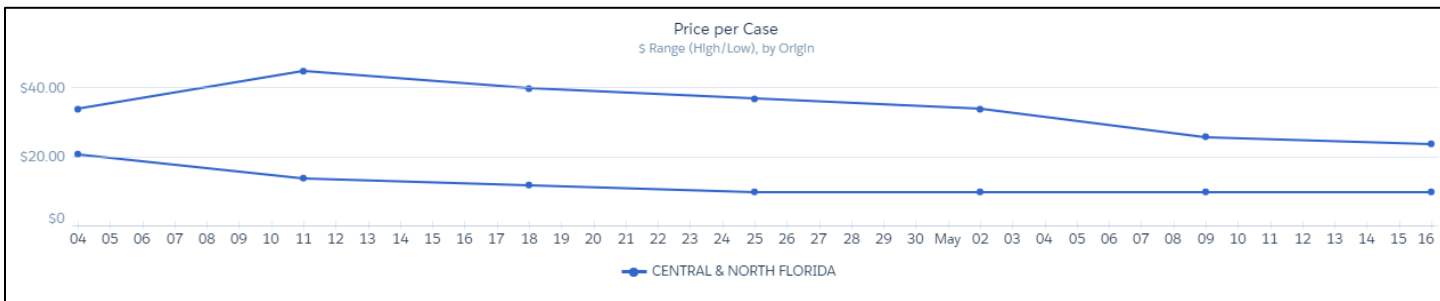


Figure 33: Pricing of Florida blueberry flats, 4/1/15 through 6/30/15.

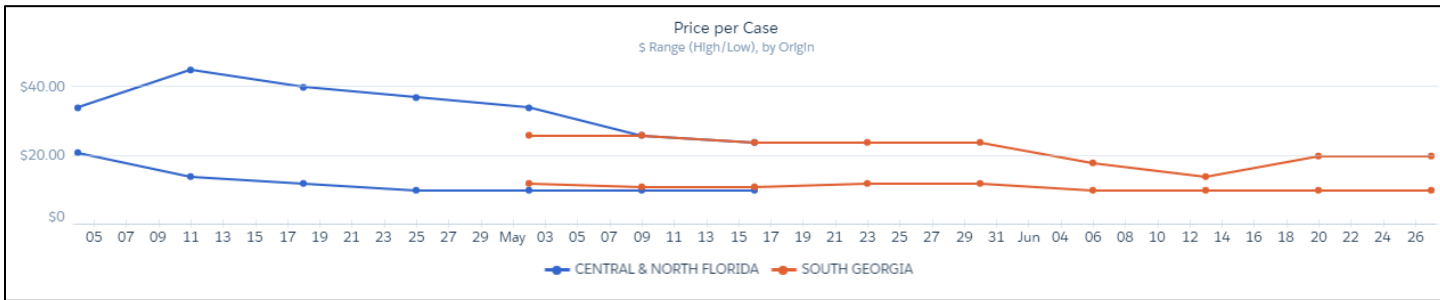


Figure 34: Florida prices compared with Georgia, April - June 2015.

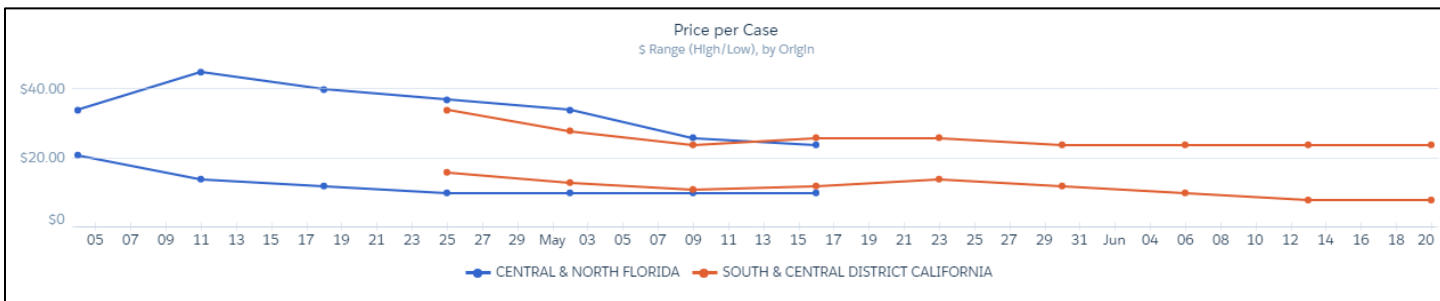


Figure 35: Florida prices compared with product from California, April - June 2015.

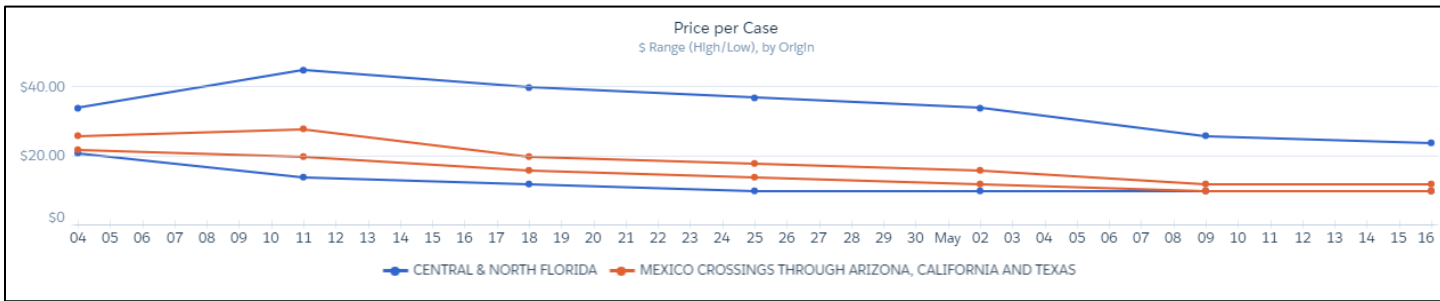


Figure 36: Florida prices compared with Mexico. The narrower, lower price range of Mexican product is more apparent in 2015 than in 2016.

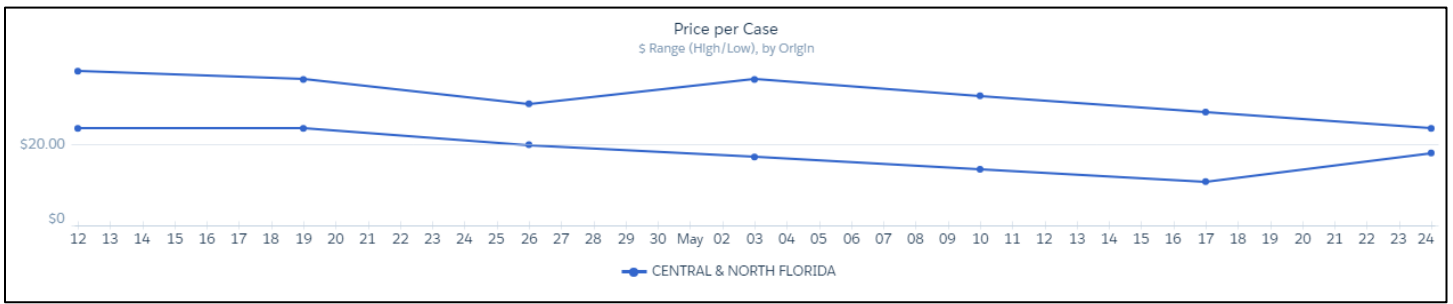


Figure 37: Pricing of Florida product, 2014 production season.

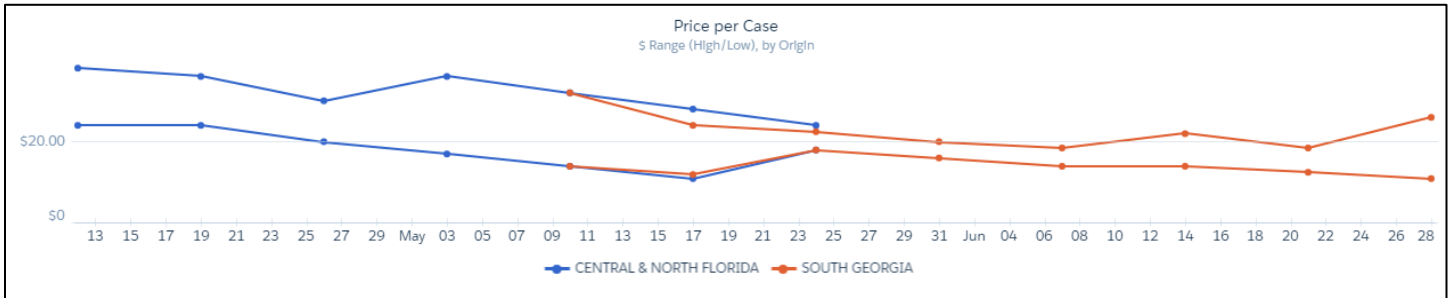


Figure 38: Florida pricing compared with Georgia, 2014 season.

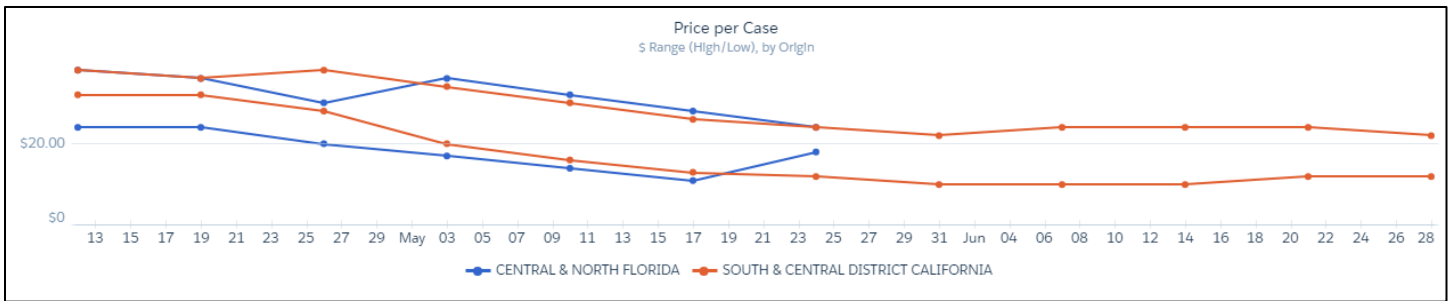


Figure 39: Florida pricing compared with California, 2014 season.

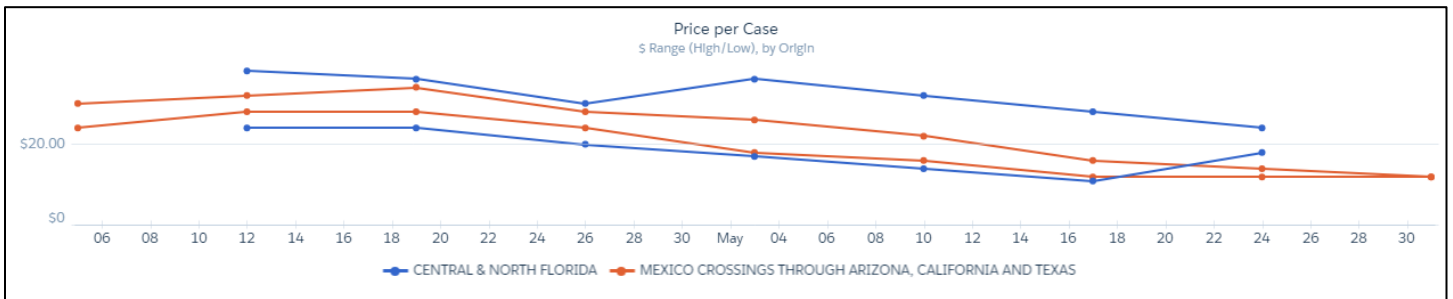
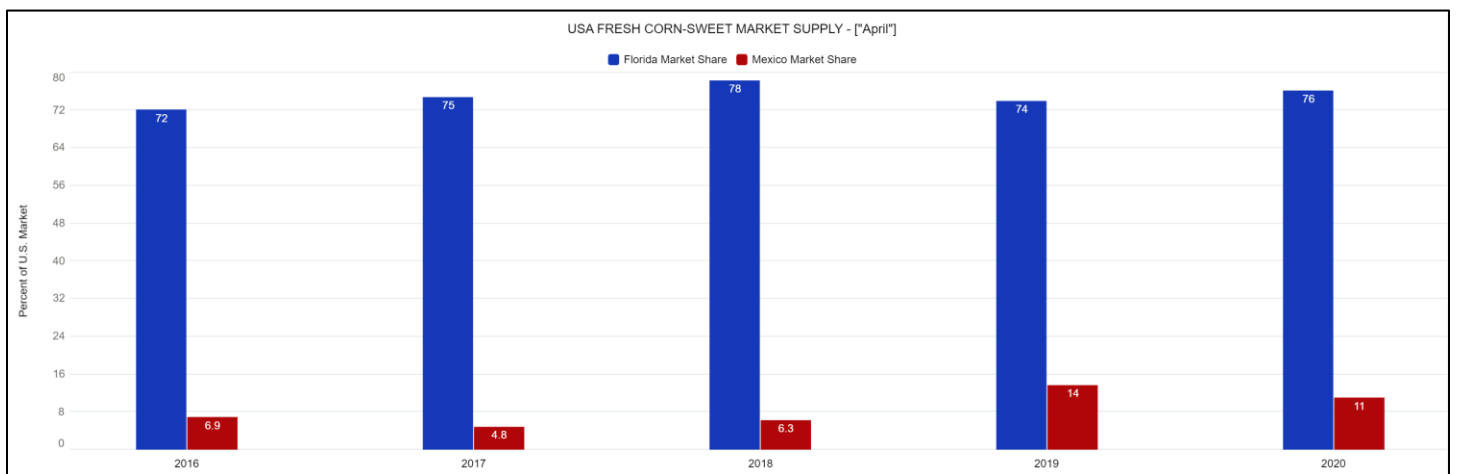
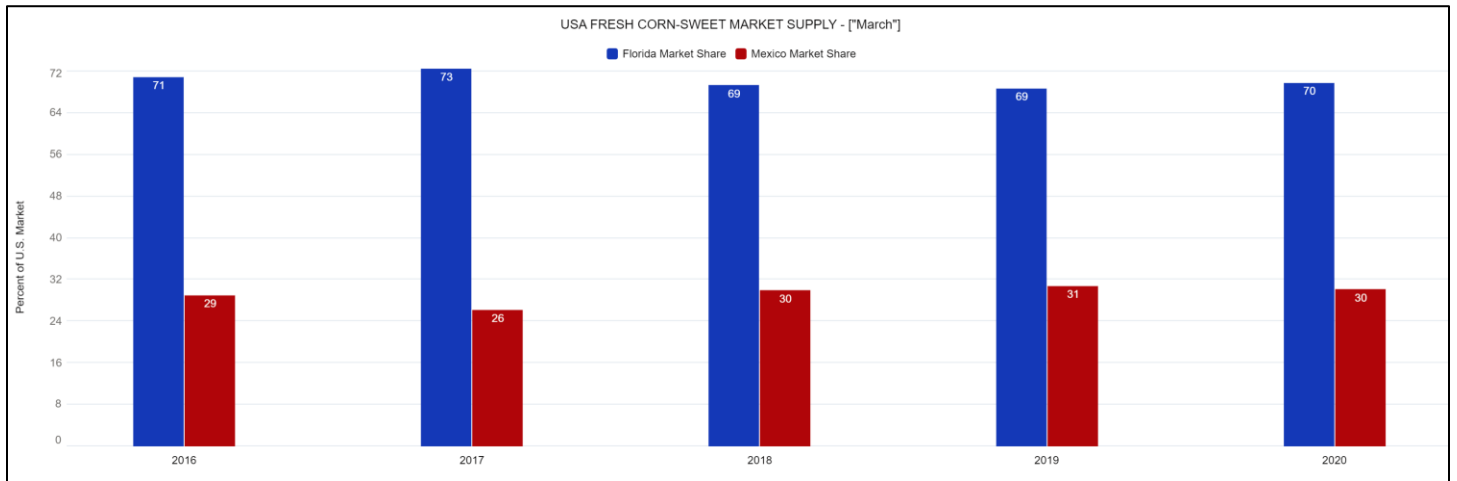


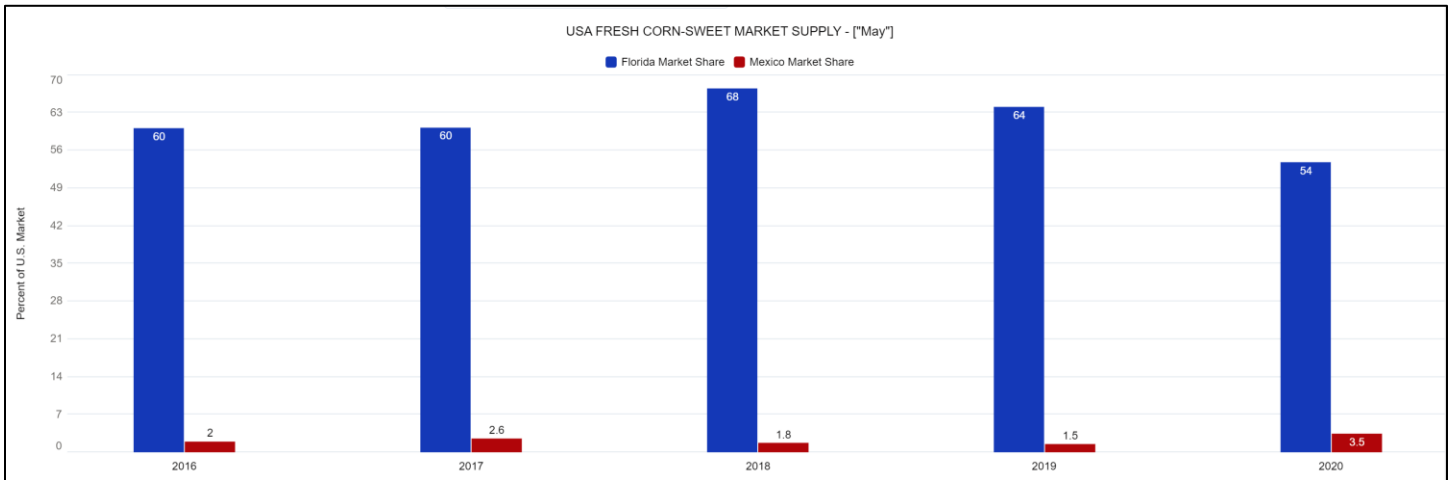
Figure 40: Pricing of Florida product compared with Mexican imports, 2014 season.

## SWEET CORN Analytics/Market Share Shifts

Examining the fresh sweet corn market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through April, Florida and Mexico provide 90-95% of the U.S. supply of sweet corn, about 8.2 million cases between the two regions in 2019. Lowest reported price for Florida product averaged \$17.43 per case between 2015 and 2019. Average lowest Mexican price over the same period was \$14.47 per case. Examining Low/High price ranges of Mexican sweet corn shipments consistently falls in the range of \$10-\$13 figures 56-59 (refer to following pages in this section), about 20% or more below their average price. Mexican low prices here, precludes shipments from competing from Florida when shipping costs are added to Florida's \$17.43 average.

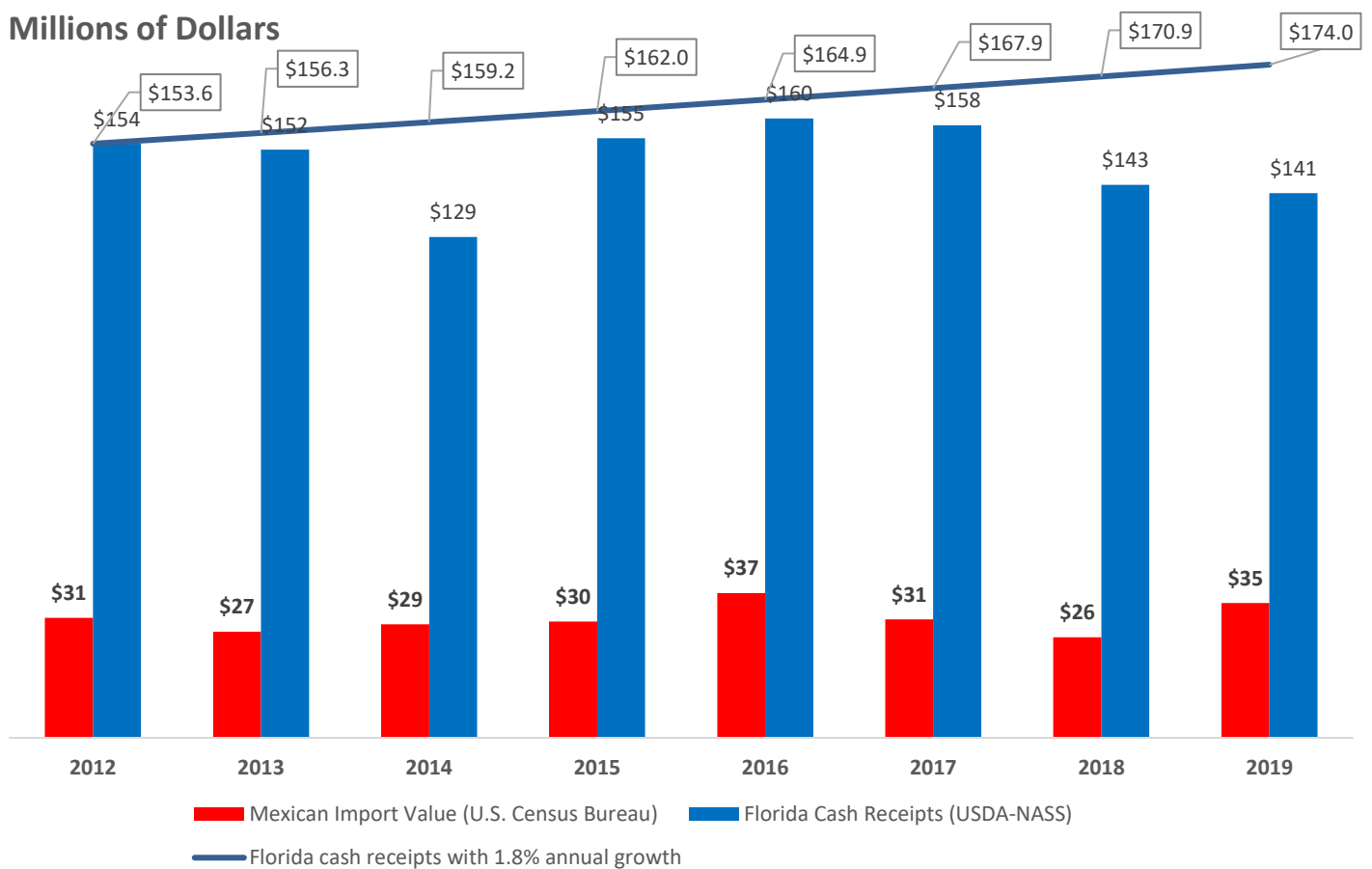
Conversely, Mexican product imported through Texas destined for areas 500-2,500 miles eastward, should see an increase in price as shipping adds from \$1.50-\$4 per carton. In east coast areas, Mexican aggressively priced product in this range would force Florida product to charge similar prices minus shipping, effectively setting minimal entry price positions, reducing market share, revenues and profitability.





## Mexico Sweet Corn Exports and Florida Sweet Corn Cash Receipts 2012-2019

Millions of Dollars



The economic injury to Florida, is compounded by loss of growth of sales in addition to the losses estimated that occurred due to lower pricing on the previous chart.

- The value of Mexican imports increased by 13% between 2012 and 2019.
  - MX average sales (2015-2019) annually of \$31.8 million.
- Florida's sweet corn sales decreased by 8.5% during the same period.
  - FL average cash receipts (2015-2019) annually of \$151 million.
- NOTE: Shipments from Mexico have mostly remained steady in value, with 2016 and 2019 as exceptions.
- \$174 million: Estimate of Florida sweet corn cash receipts if Florida shipments had grown at the same rate from 2012 – 2019 as did the value of imports from Mexico.
- \$159 million: Estimate of Florida 2018 sweet corn cash receipts if Florida market share in 2018 had been same as in 2000.

## Historical supply of Florida production and Mexican sweet corn exports to the U.S.

Mexican exports remained relatively below 100 million pounds from 2000-2008, when an accelerated expansion of product began flowing into the US. The U.S. sweet corn market appears in a steady state or consolidation pattern, with no discernible trend visible in both volume and value of production. The year of greatest cash receipts for Mexican producers came in 2016, when supply from Florida was short. In 2012, Mexico's cash receipts were \$31Mn with 110Mn pounds and in 2019, their cash receipts were \$35Mn with 137Mn pounds. Reduction in the total volume sold for both Florida and Mexico appears to have hurt Florida cash receipts more than Mexican import values.

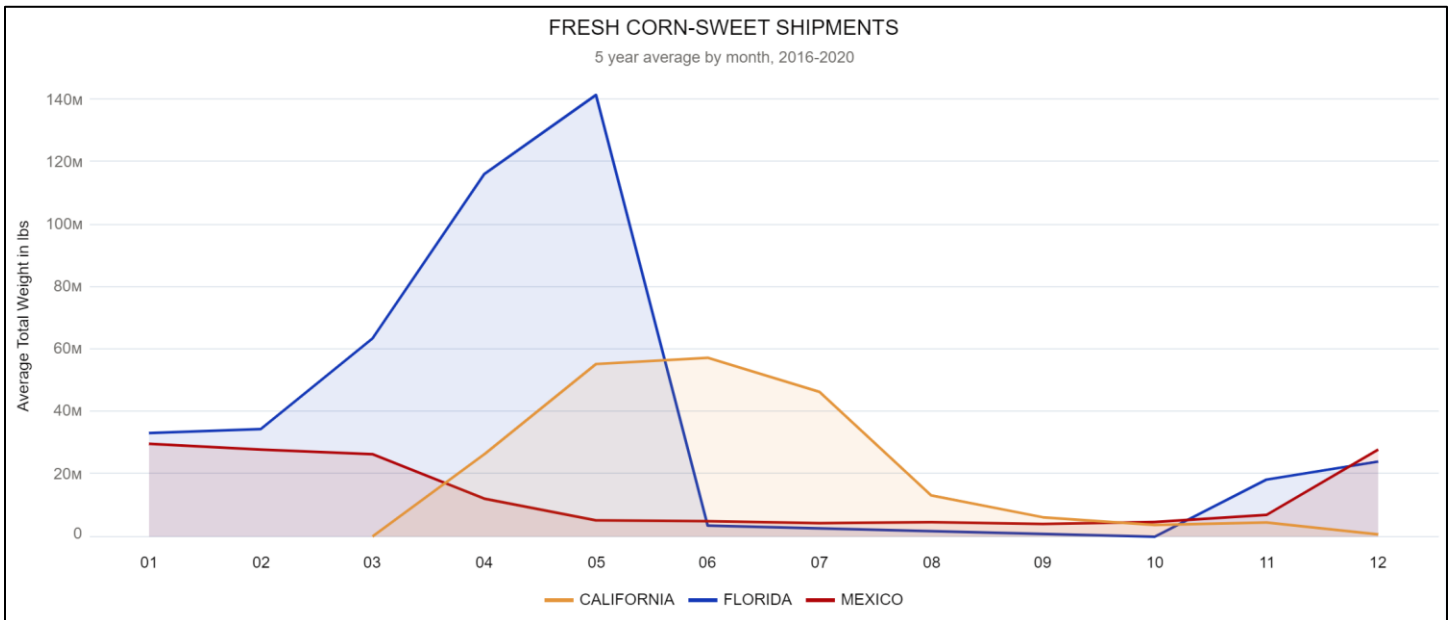
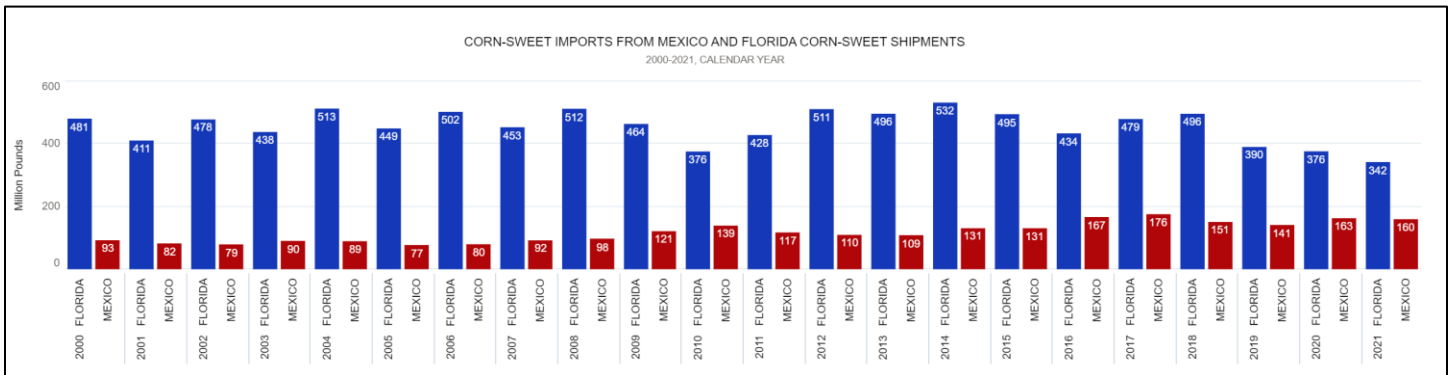
*\*Values on the graphs for 2021 were not used in calculations as only partial year values are currently available. 2021 values below are year to date shipments through July 2021.*

76%: Expansion of Mexican product from 2000 to 2020

\$152 million: Mexican average number of pounds exported from 2015-2020

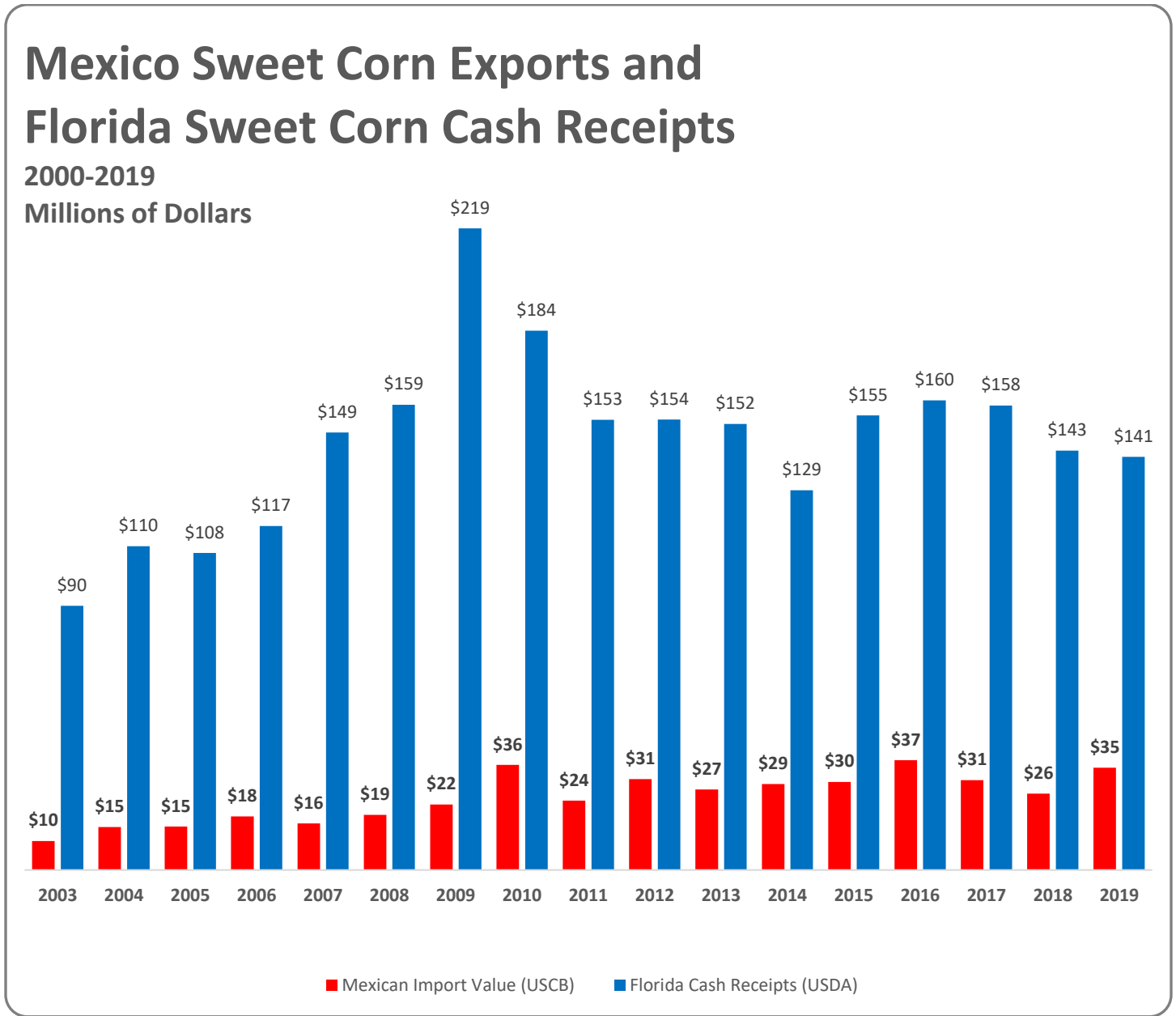
-19%: Decline in Florida production from 2000 to 2019

\$447 million: Florida average number of pounds produced from 2015-2019





**Historical value of Florida production and Mexican sweet corn exports to the U.S.**



17%: Growth of the **value** of Mexican product from 2015 to 2019

\$32 million: Mexican average value exported from 2015-2019

8.5%: Decrease in the value of Florida product from 2015 to 2019

\$151 million: Florida average production value from 2015-2019

## Historical Pricing strategy and relative high-low ranges of Florida, California, and Mexico

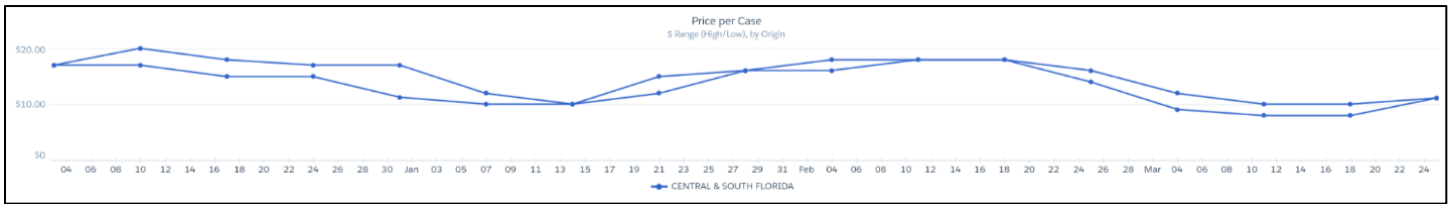


Figure 41: Case price range for Florida sweet corn between 12/1/16 and 3/31/17.

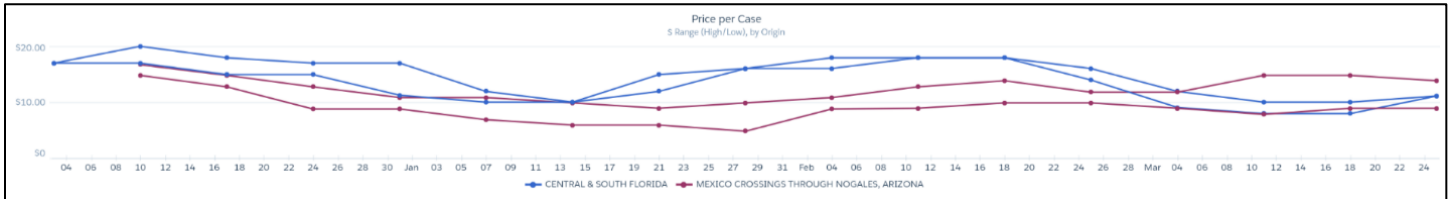


Figure 42: Case price range for Florida compared with Mexican sweet corn, December 2016 through March 2017.

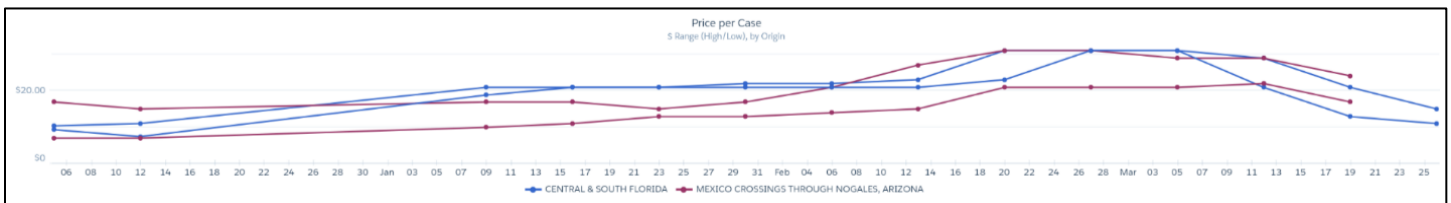


Figure 43: Florida and Mexico sweet corn case prices compared, December 2015 - March 2016.



Figure 44: Florida and Mexico sweet corn case prices compared, December 2014 - March 2015. In all three years compared, Mexico maintains a price range which is generally significantly lower than that paid to Florida growers.

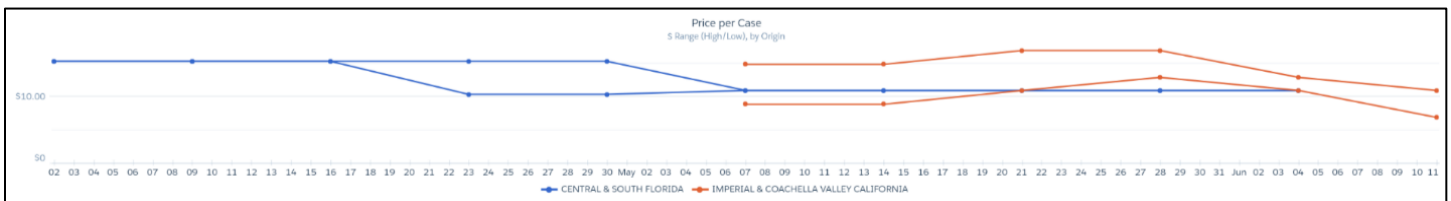


Figure 45: For purpose of comparison, sweet corn produced in the Imperial/Coachella Valley districts of California demonstrate a wider and more competitive range of case prices. This chart shows pricing between 4/1/16 and 6/30/16.

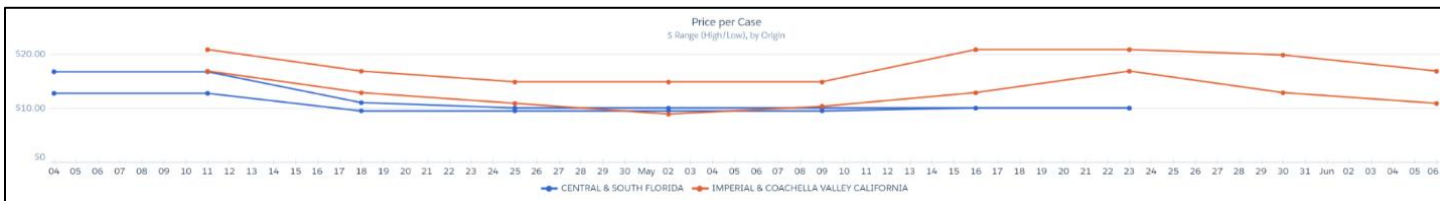


Figure 46: As above, Florida case prices compared with those in a competitive California production region. This chart shows prices between 4/1/15 and 6/30/15.

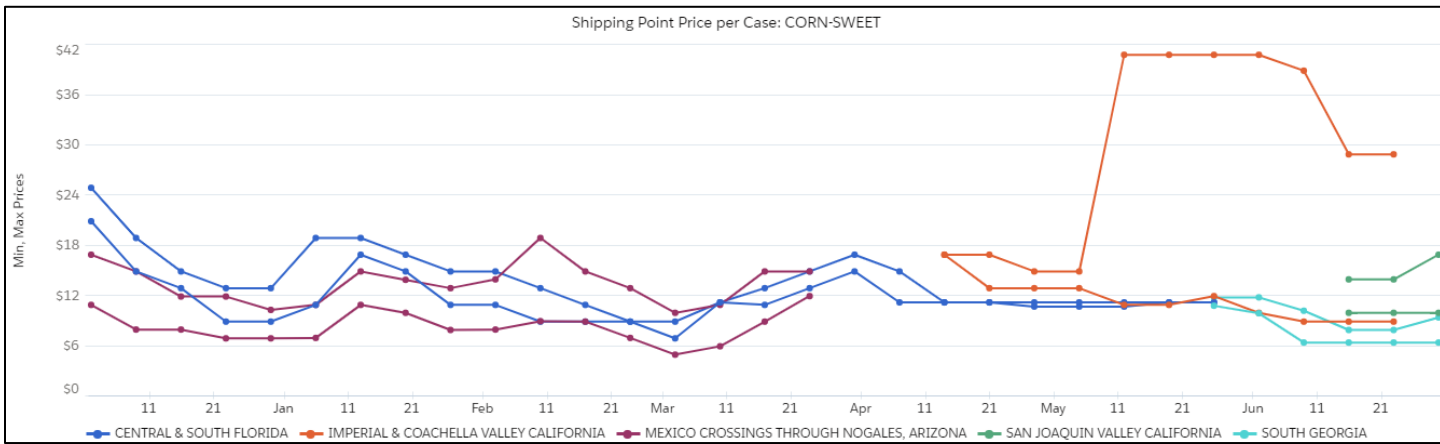


Figure 47: Shipping point prices for sweet corn from Florida and Mexico during Florida's 2017-2018 season.

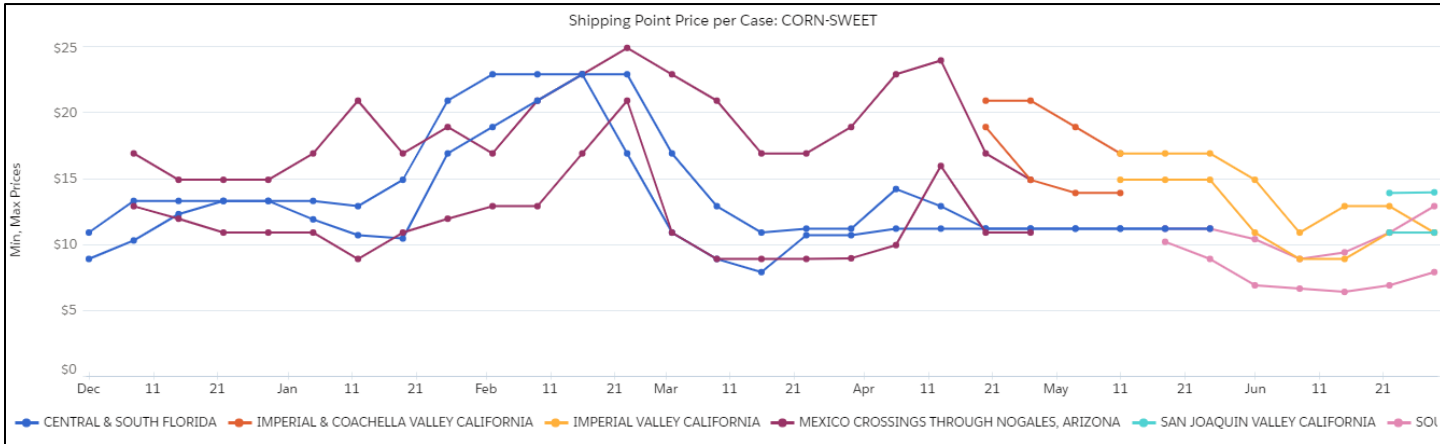
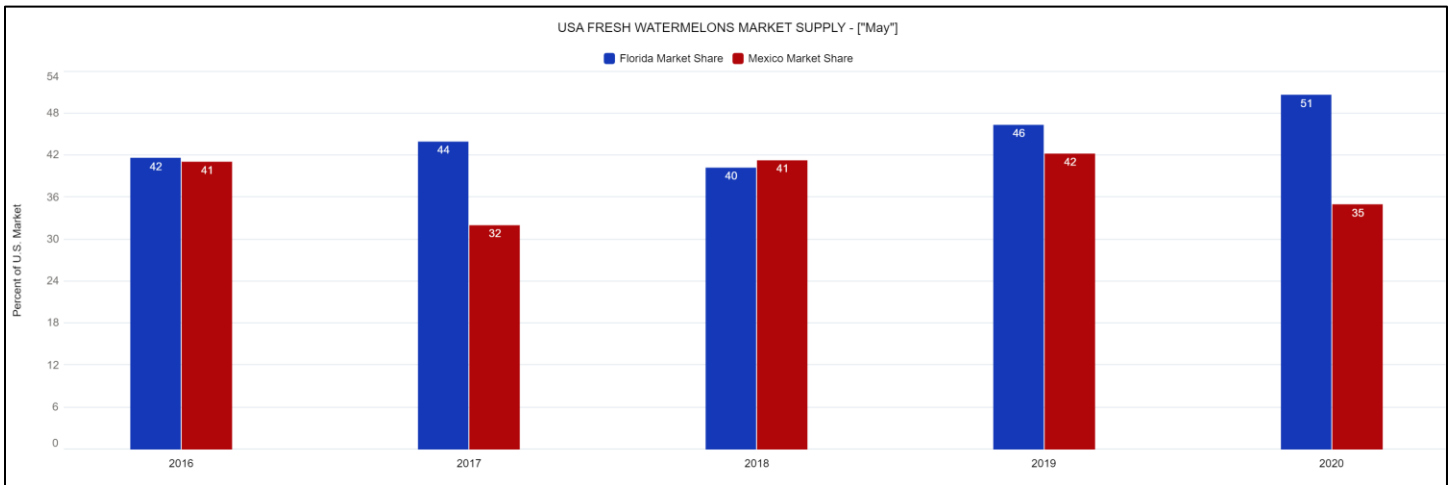
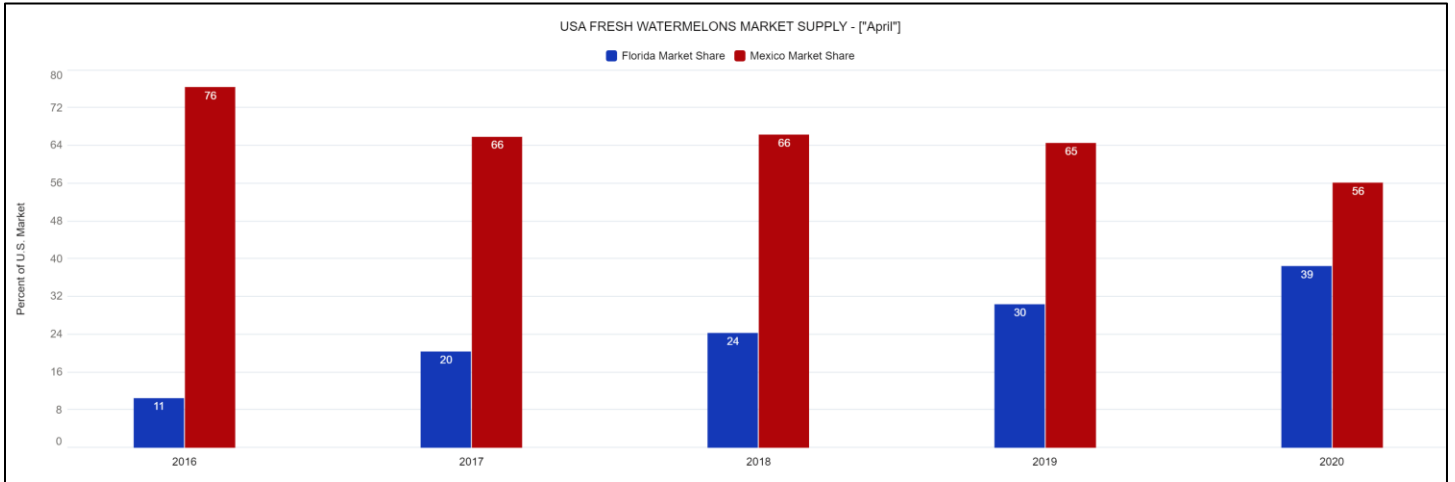


Figure 48: Shipping point prices for sweet corn from Florida and Mexico during Florida's 2018-2019 season

## WATERMELON Analytics/Market Share Shifts

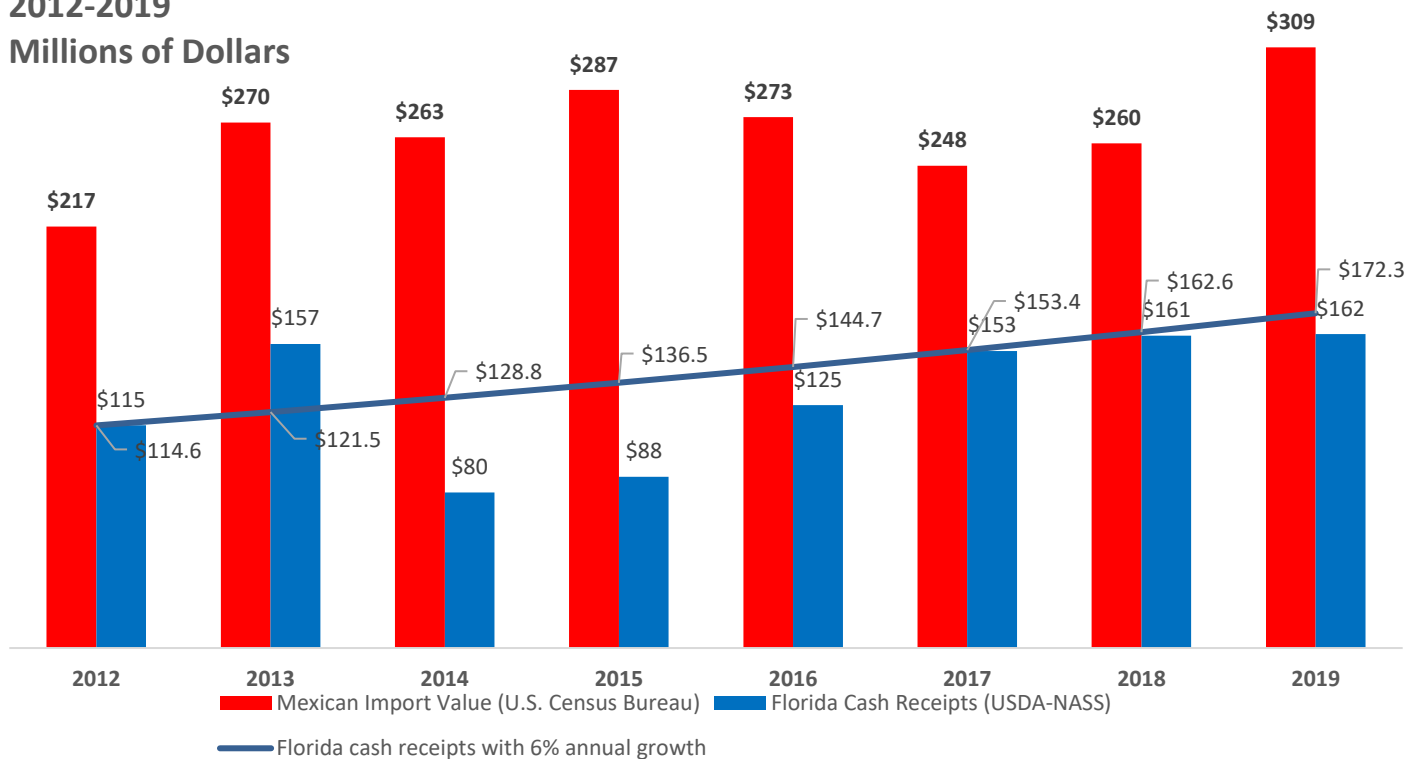
Examining the fresh watermelon market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From April - June, Florida and Mexico together provide 64% of the U.S. supply of watermelons, 2.3 million 1,000-lb bins in 2019. Lowest reported price for Florida product averaged \$89.57 per bin between 2015 and 2019. Average lowest Mexican price over the same period was \$55.07 per bin.

Mexican low prices here, precludes shipments from competing in the western U.S. from Florida after \$3+ dollars are added to Florida product price of \$89.57.



## Mexico Watermelon Exports and Florida Watermelon Cash Receipts 2012-2019

Millions of Dollars



The economic injury to Florida is compounded by loss of growth of sales in addition to the losses estimated that occurred due to lower pricing on the previous chart.

- The value of Mexican imports to the U.S. grew 42% from 2012 to 2019. Annual growth averaged 6%.
  - MX average sales (2015-2019) annually of \$275 million.
- Florida’s watermelon sales increased by 41% during the same period.
  - FL average cash receipts (2015-2019) annually of \$138 million.
- \$172 million; cash receipts in 2019 of Florida watermelons, if the average annual growth rate (6%) experienced by Mexico is applied to Florida’s watermelon value of production.
- \$236 million; Estimate of Florida 2018 watermelon cash receipts if Florida market share in 2018 had been the same as in 2000.

## Historical supply of Florida production and Mexican watermelon exports to the U.S.

Mexican exports remained between 500-800 million pounds from 2000-2005, more product began flowing into the US. beginning in 2006 (edging toward 1 billion pounds) and continued to expand to 1.5 billion pounds by 2015. Comparing the relative supply positions of Florida and Mexico; in 2000 (FL=55% v. MX=45%) and they are significantly reversed by 2016 (MX=66%; FL 34%). Total demand for the product expanded as well.

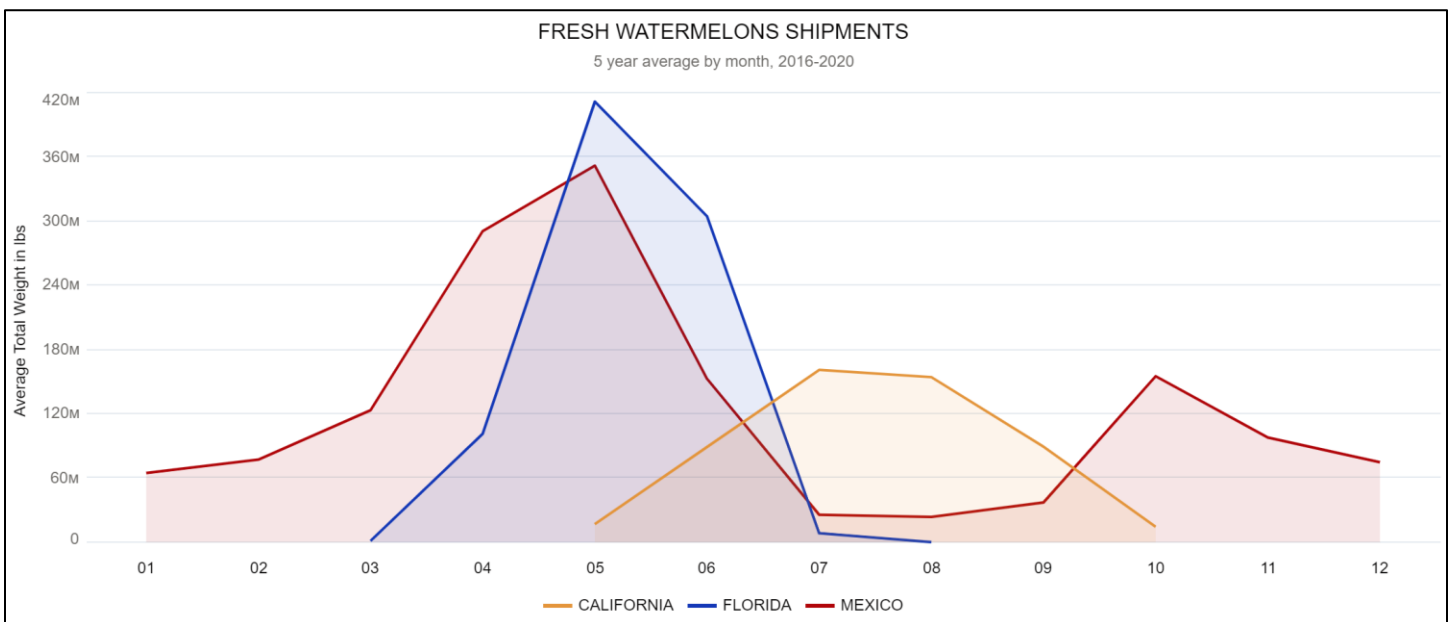
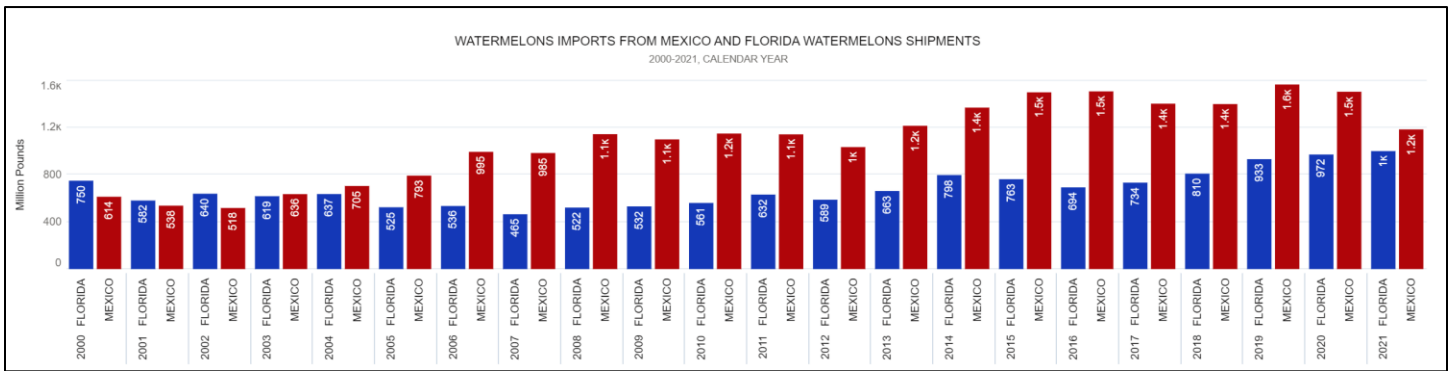
*\*Values on the graphs for 2021 were not used in calculations as only partial year values are currently available. 2021 values below are year to date shipments through July 2021.*

145%: Expansion of Mexican product from 2000 to 2020

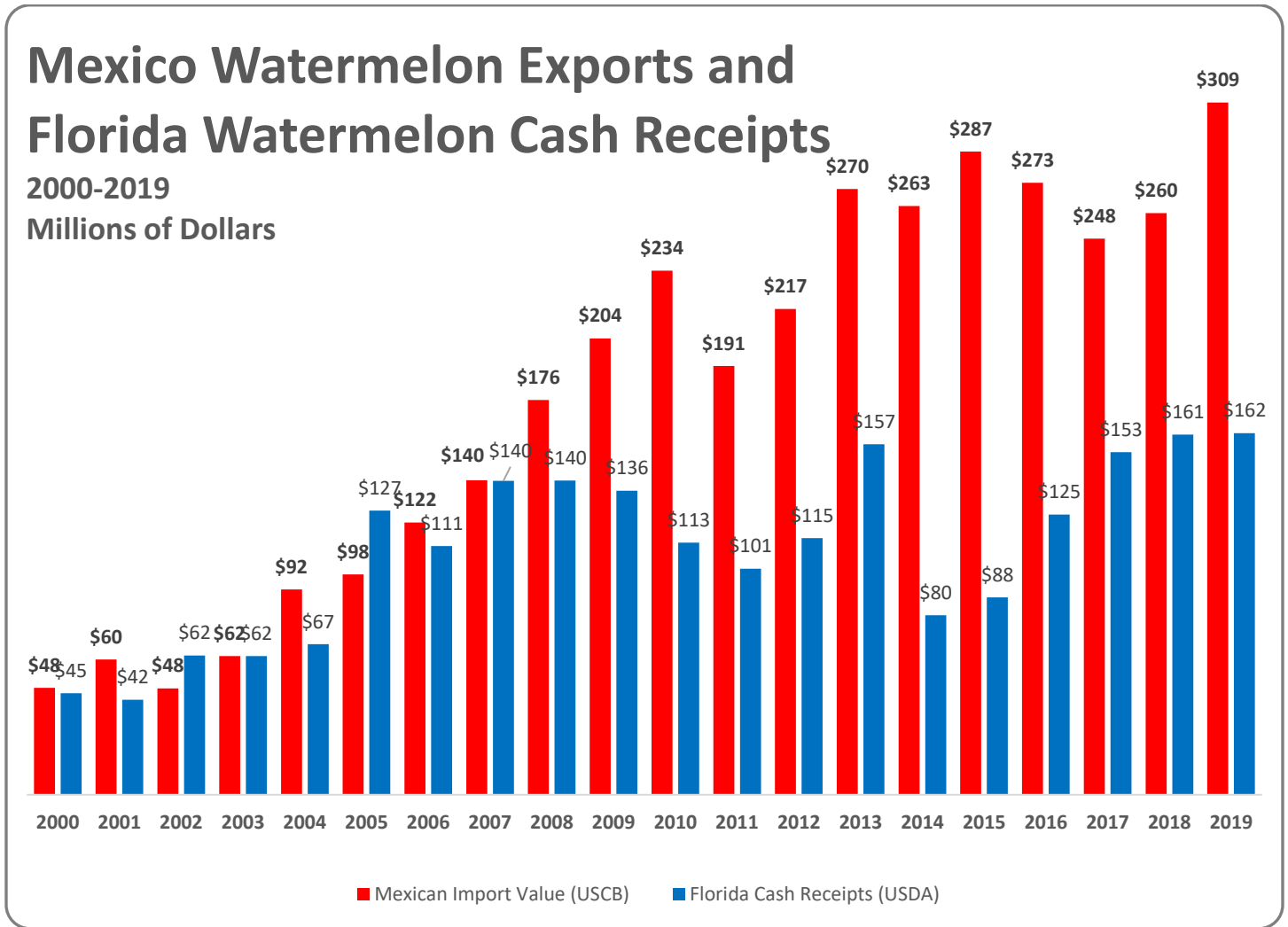
\$1.48 billion: Mexican average number of pounds exported from 2015-2020

24%: Increase of Florida product from 2000 to 2019

\$842 million: Florida average number of pounds produced from 2015-2020



**Historical value of Florida production and Mexican watermelon exports to the U.S.**



544%: Expansion of the value of Mexican product from 2000 to 2019

\$275 million: Mexican average value exported from 2015-2019

260%: Expansion of the value of Florida product from 2000 to 2019

\$138 million: Florida average production value from 2015-2019

## Historical Pricing strategy and relative high-low ranges of Florida, California, and Mexico

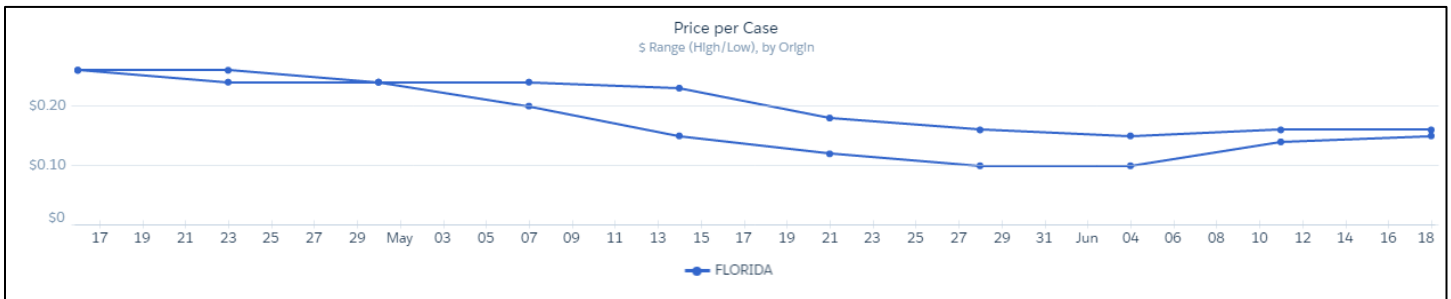


Figure 49: Watermelon pricing (per lb) for 24-inch bins. Highest and lowest reported prices, Florida product only, April – June 2016. “Bins” are 4 foot by 4 foot pallets with cardboard siding, holding approximately 50 melons each. These are used during high demand and supply periods throughout the U.S.

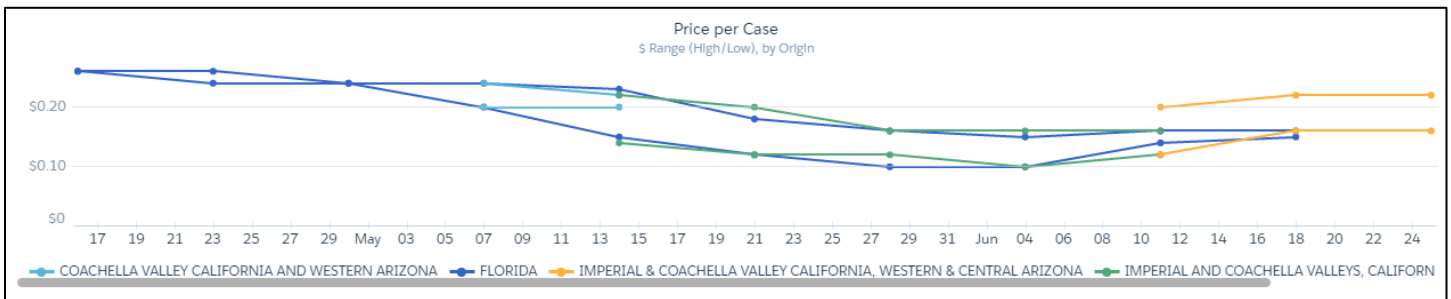


Figure 50: Florida and California prices compared; 24-inch bins, April - June 2016. Pricing appears to be closely mirrored in the respective U.S. producing areas.

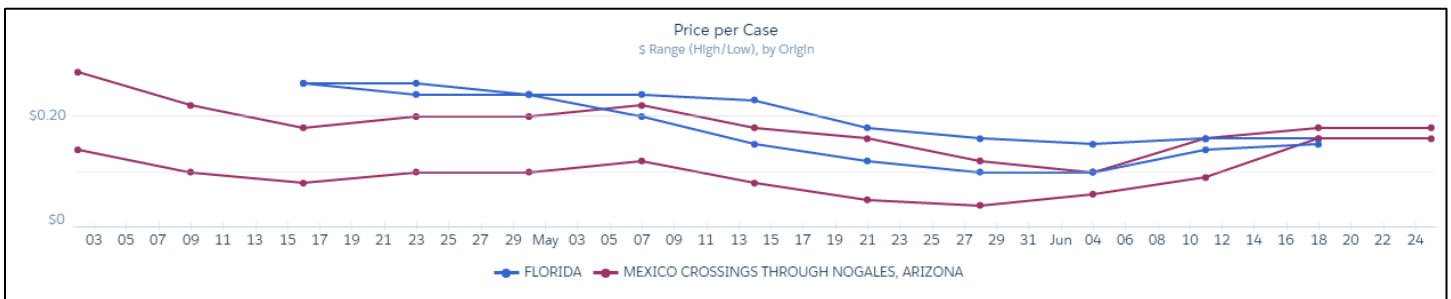


Figure 51: Florida prices compared to product imported through Nogales, AZ, April - June 2016. Mexican pricing maintains a position considerably under those in Florida, even though the product is being shipped between 600-1900 miles across the U.S.



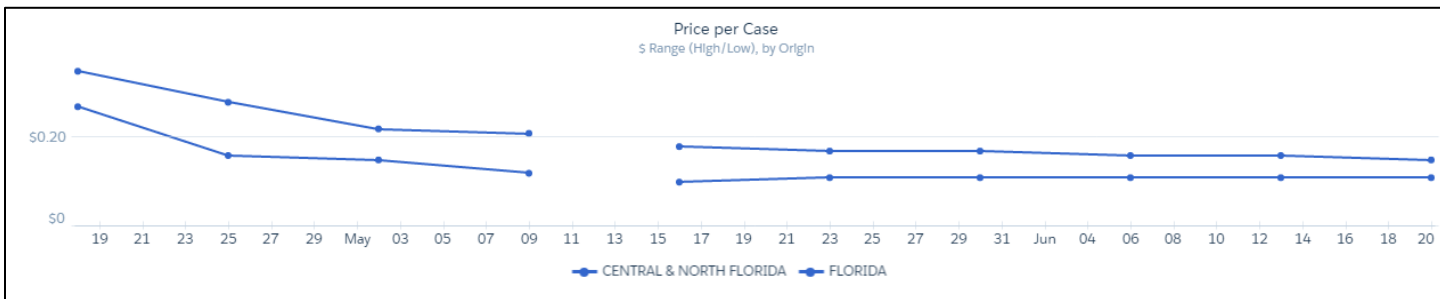


Figure 52: Price per pound, 24-inch bins, Florida product only, April - June 2015

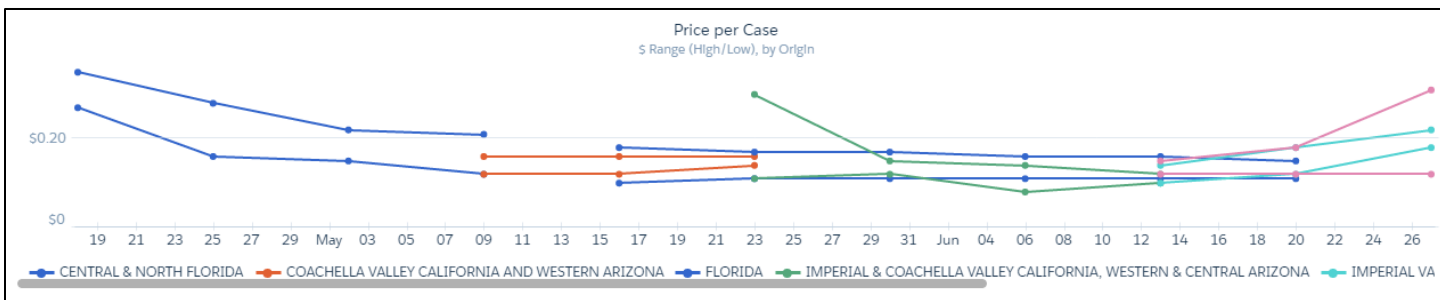


Figure 53: Florida prices compared with California, April - June 2015.

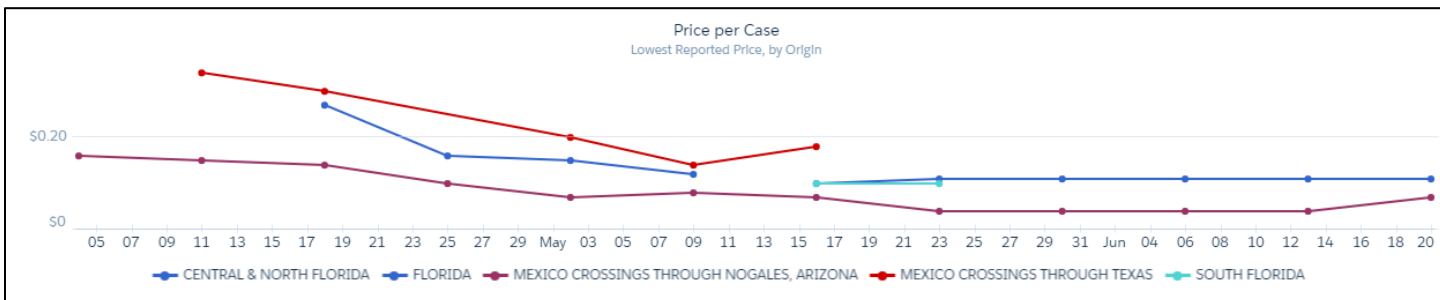
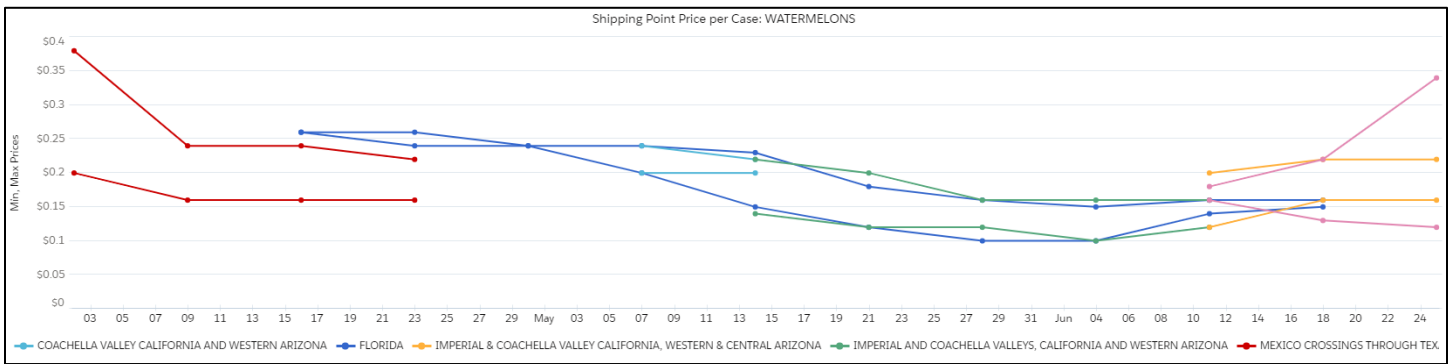
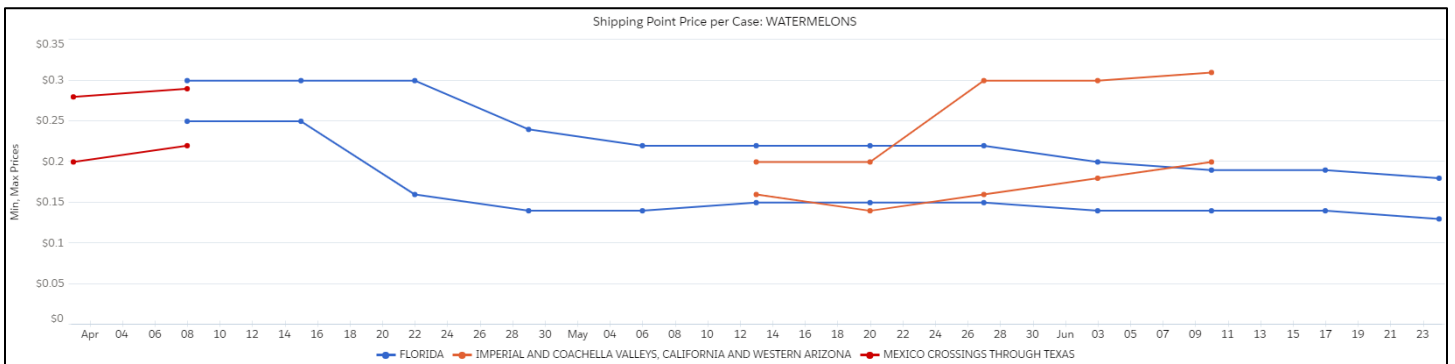


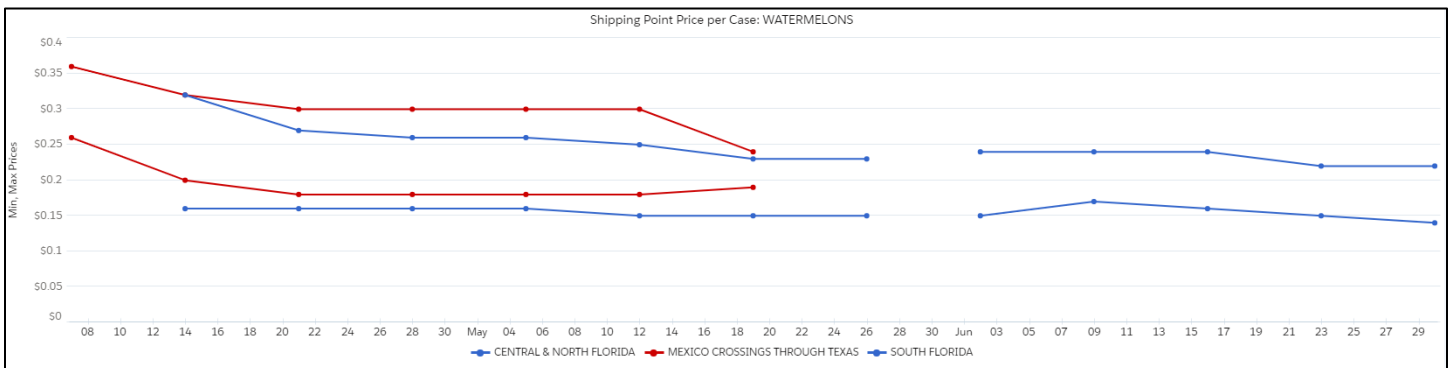
Figure 54: Florida prices compared with product from Mexico, April - June 2015.



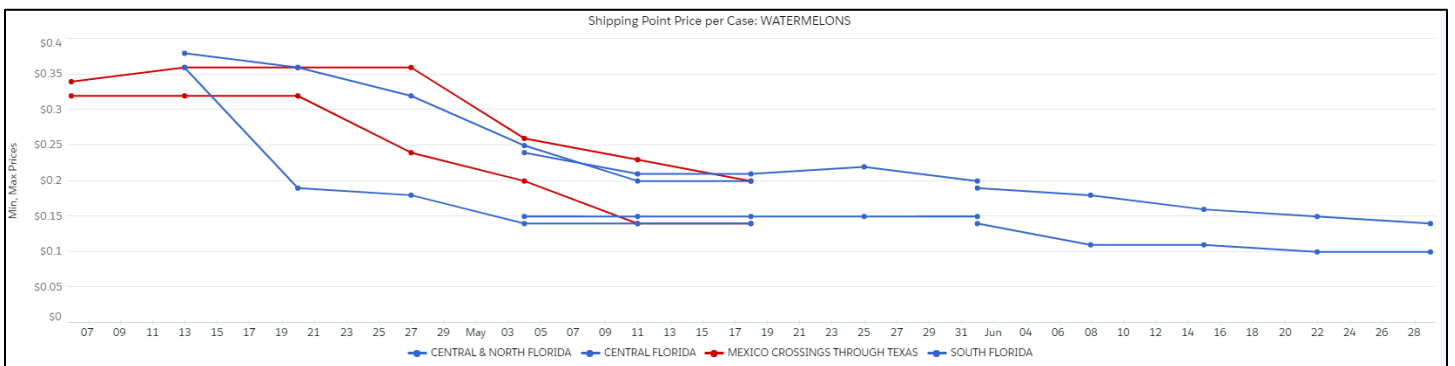
55: Watermelon shipping point prices, 2016 season



56: Watermelon shipping point prices, 2017 season

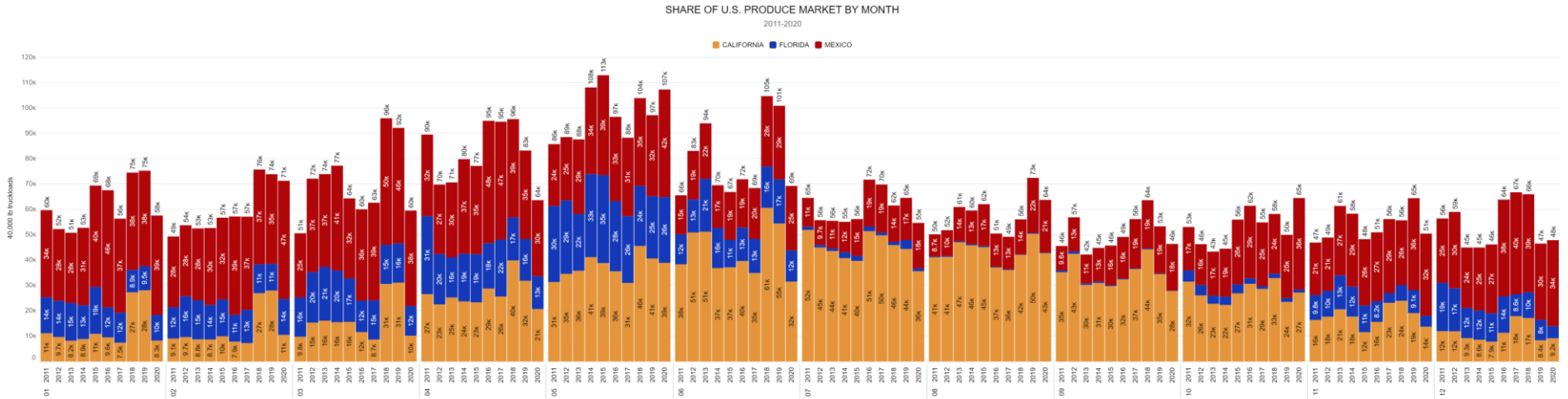


57: Watermelon shipping point prices, 2018 season

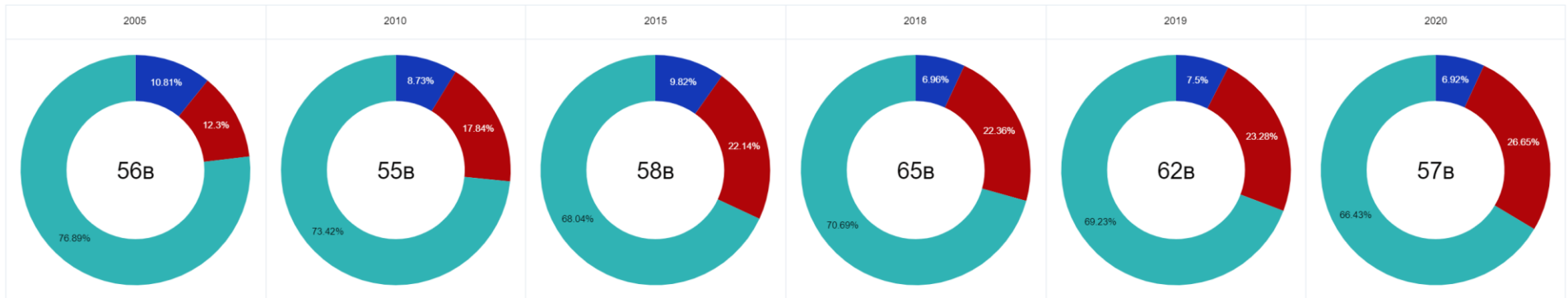


58: Watermelon shipping point prices, 2019 season

# Supplement 1: Market Share Trends for all Market News Commodities as of July 2021



FRESH PRODUCE MARKET SHARE  
All Months

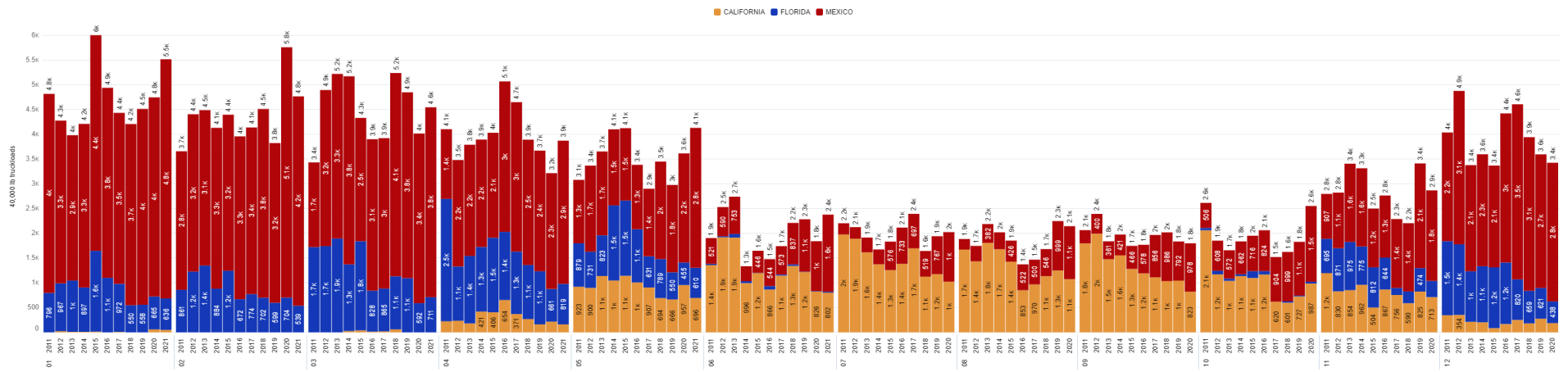


Florida's (2005) market share of 11.81% of 56 billion pounds of the total U.S. market equates to 6.010 billion pounds, by 2020 Florida's 6.92%MS equates to 3.958 Bn pounds, a **decline** of 36.0% or 2.2 billion pounds of assorted commodity. Total domestic supply/consumption expanded by 2.9% (2005-2020)

2.2 billion pounds x (.35+1.32/2) per pound = Estimated \$2.2 billion-dollar loss of sales range.

Mexican **gain** of 112% from 2005 to 2020

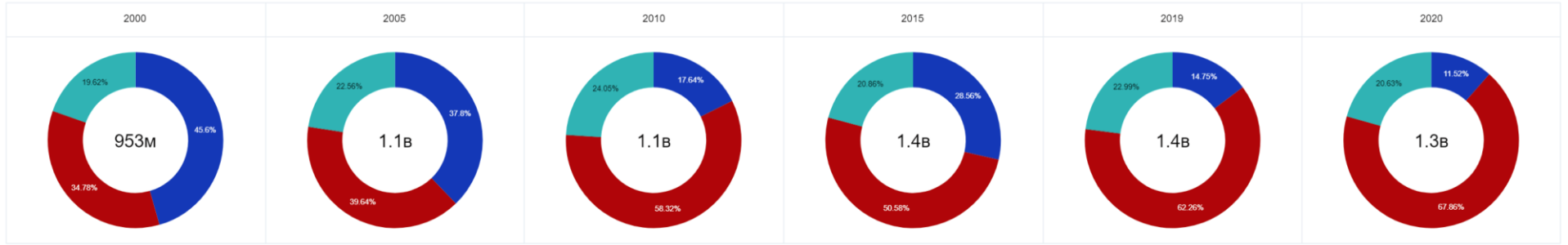
SHARE OF U.S. PEPPERS BELL TYPE MARKET BY MONTH  
2016-2021



PEPPERS BELL TYPE MARKET SHARE

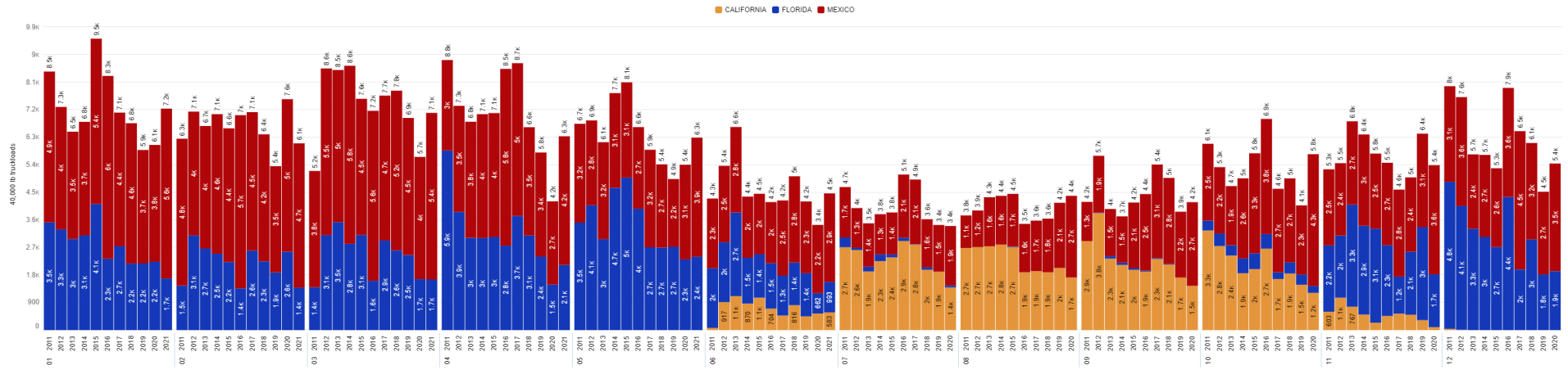
[ "January", "February", "March", "November", "December", "April", "May", "June" ]

FLORIDA MEXICO OTHERS



**-74.75%** Loss of Florida Market Share between 2000 and 2020  
**+195.13%** Mexico's increase in Market Share in the U.S. between 2000 and 2020  
**+40.38%** Change in total U.S. supply between 2000 and 2020 is 385 million pounds

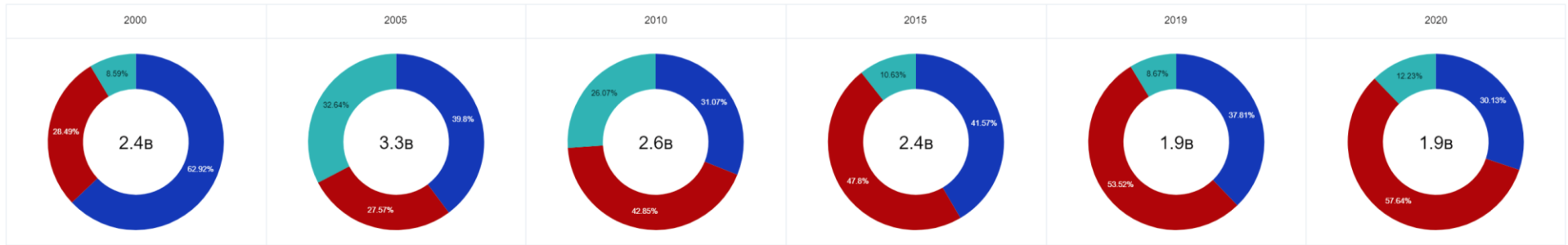
SHARE OF U.S. TOMATOES MARKET BY MONTH  
2010-2021



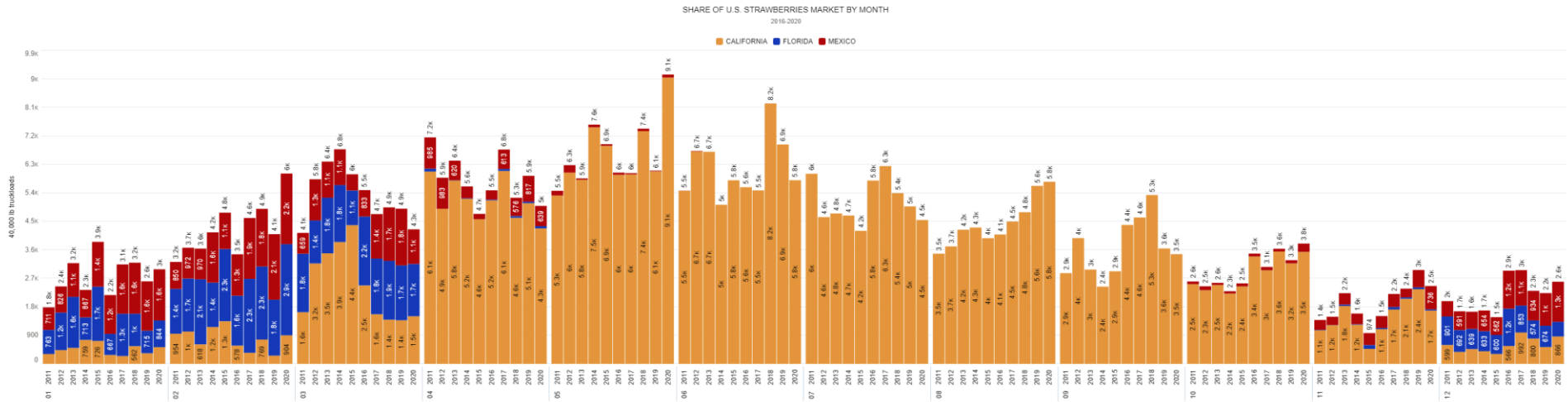
TOMATOES MARKET SHARE

[ "January", "February", "March", "November", "December", "April", "May", "June" ]

● FLORIDA ● MEXICO ● OTHERS

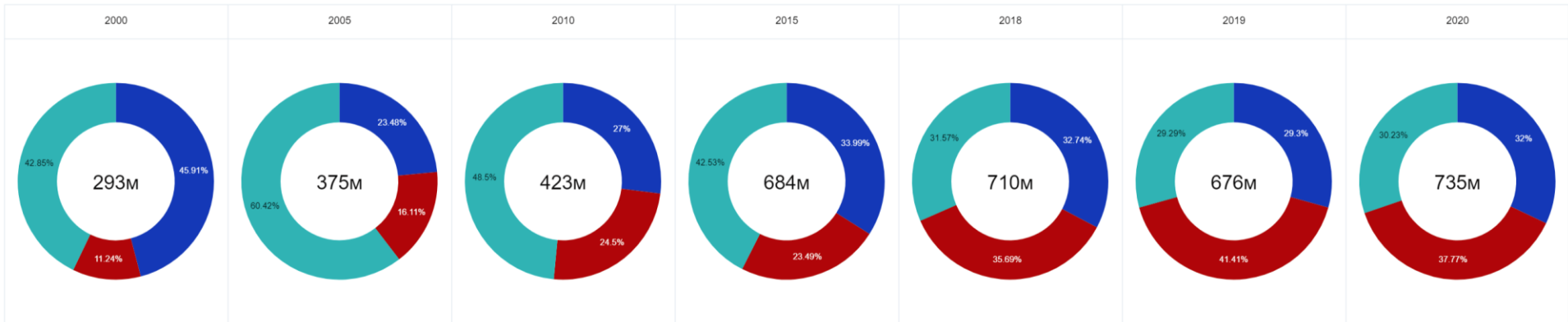


- 52.1% Loss of Florida Market Share between 2000 and 2020
- +6.7% Mexico's increase in Market Share in the U.S. between 2000 and 2020
- 18.43% Change in total U.S. supply between 2000 and 2020 is down 438 million pounds
- Noteworthy Florida reversed a steady loss of market share thru 2017 with modest gains, though comparing proportional 2000 (1510Mn pounds) to 2019 (717Mn pounds) Florida sales declined by more than 790Mn pounds



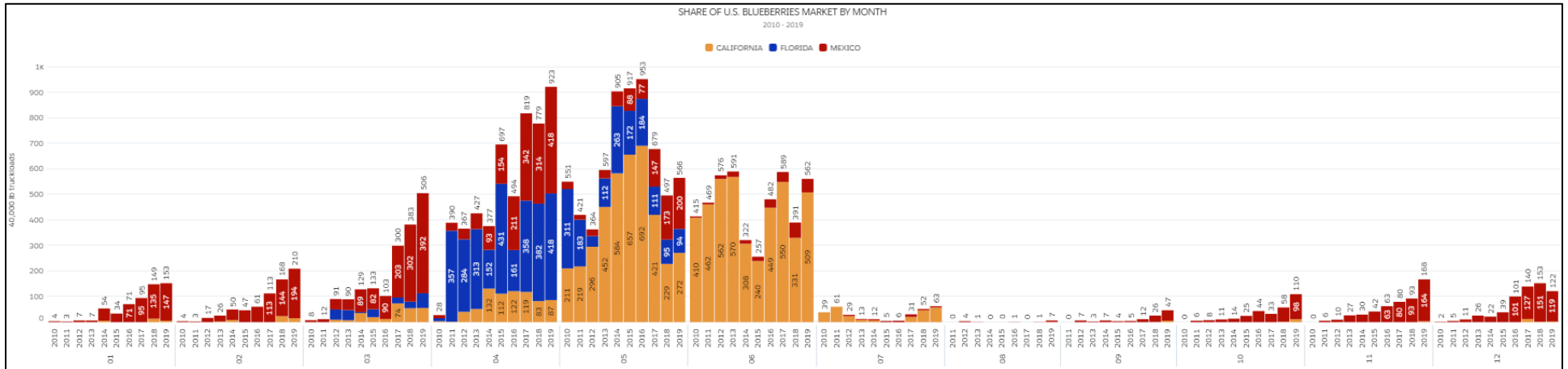
STRAWBERRIES MARKET SHARE  
["January", "February", "March", "November", "December"]

FLORIDA MEXICO OTHERS

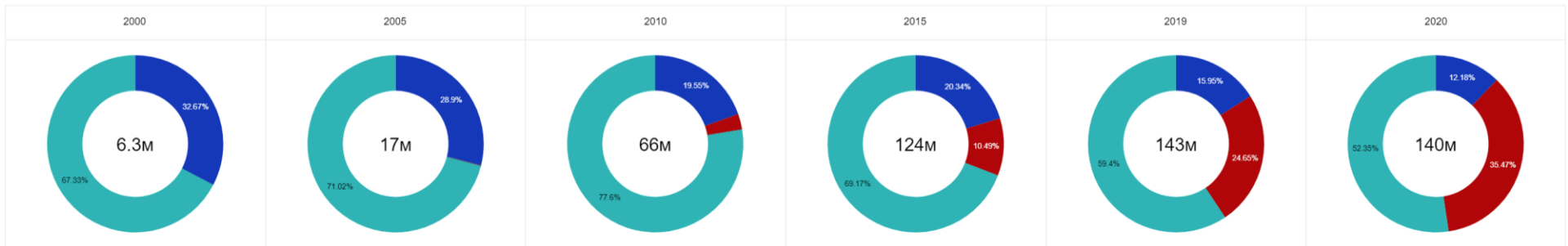


-30.3%  
+266%  
+151%  
Noteworthy

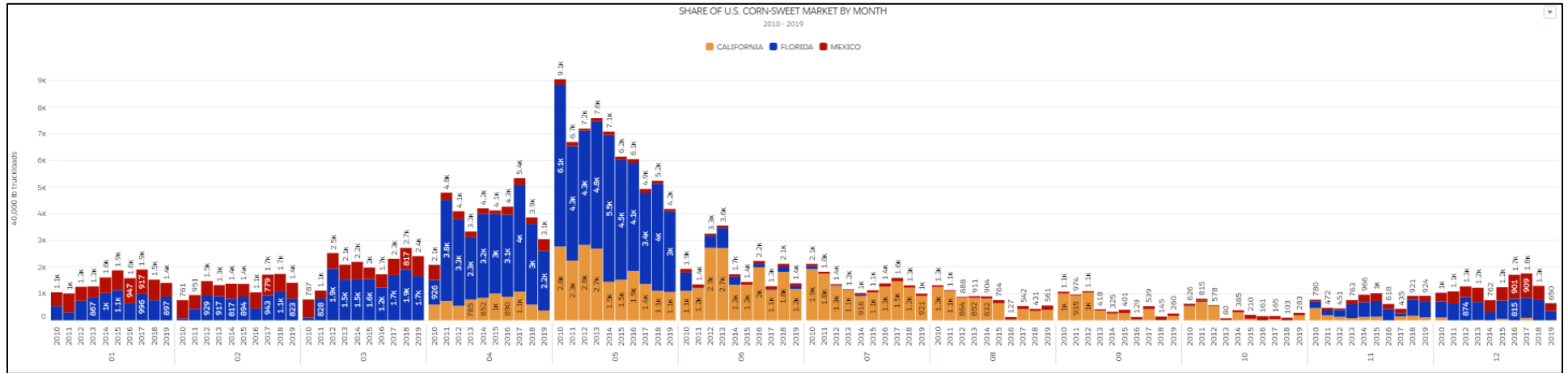
Loss of Florida Market Share percentage points between 2000 and 2020  
Mexico's increase in Market Share in the U.S. between 2000 and 2020  
Change in total U.S. supply between 2000 and 2020 is 443 million pounds  
2017-19; Average Florida loss of market share accelerated **325% faster** than our 20-year average



BLUEBERRIES MARKET SHARE  
["April", "May", "March"]



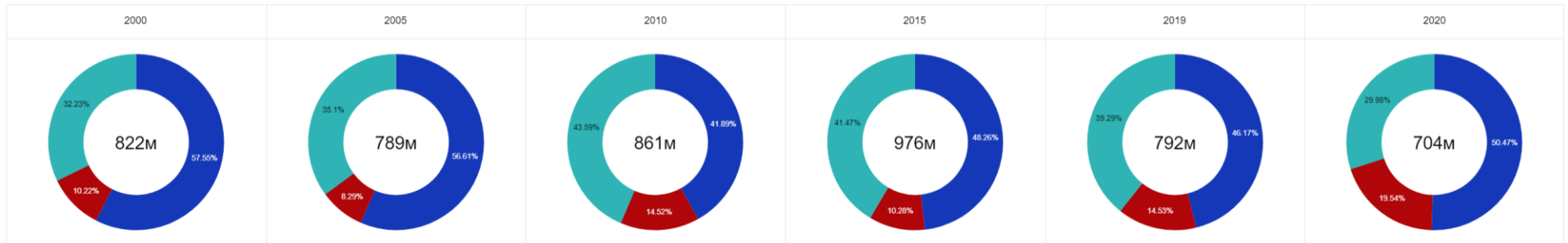
- 57.86% Loss of Florida Market Share between 2000 and 2020
- +1,145% Mexico's increase in Market Share in the U.S. between 2010 and 2020
- +2,108% Change in total U.S. supply between 2000 and 2020 is 134 million pounds
- Noteworthy Within 10 years of entering the market in 2009, MX expanded from 1.35%MS to 28.5%, 2100% increase



CORN-SWEET MARKET SHARE

[ "April", "May", "March", "January", "February", "June", "December" ]

FLORIDA (blue), MEXICO (red), OTHERS (teal)



-12.29%

Loss of Florida Market Share between 2000 and 2020

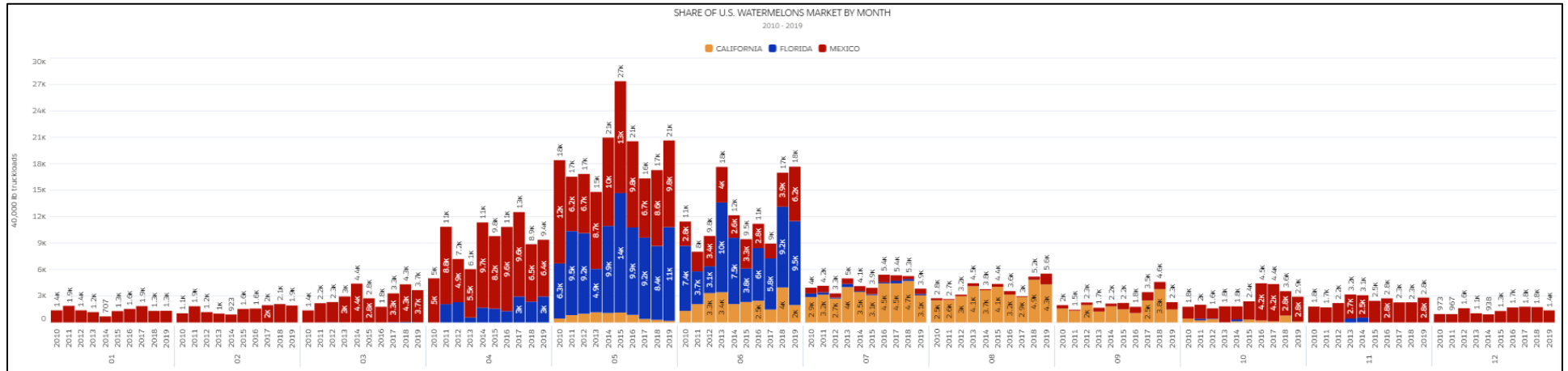
+91.2%

Mexico's increase in Market Share in the U.S. between 2000 and 2020

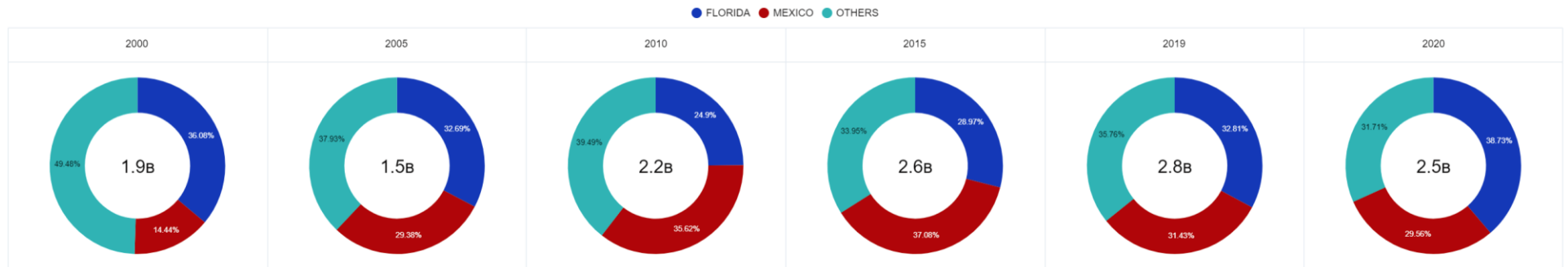
-14.36%

Change in total U.S. supply between 2000 and 2020 is down 118 million pounds





WATERMELONS MARKET SHARE  
["April", "May", "June"]

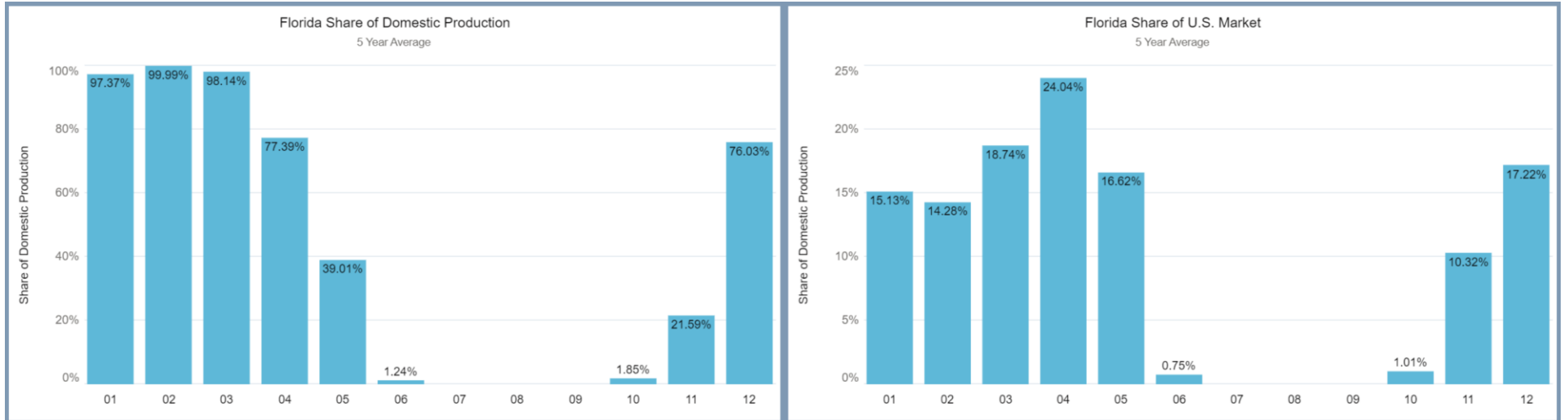


- +7.33%** Gain of Florida Market Share between 2000 and 2020
- +104.7%** Mexico's increase in Market Share in the U.S. between 2000 and 2020
- +31.1%** Change in total U.S. supply between 2000 and 2020 is 588 million pounds
- Noteworthy** Florida has retained most of our market share and modest gains, comparing proportional 2000 (685Mn pounds) to 2019 (916Mn pounds) Florida sales increased by more than 230Mn pounds

## Supplement 2: Historical Snapshot July 2021 Domestic Market Share: Bell Peppers

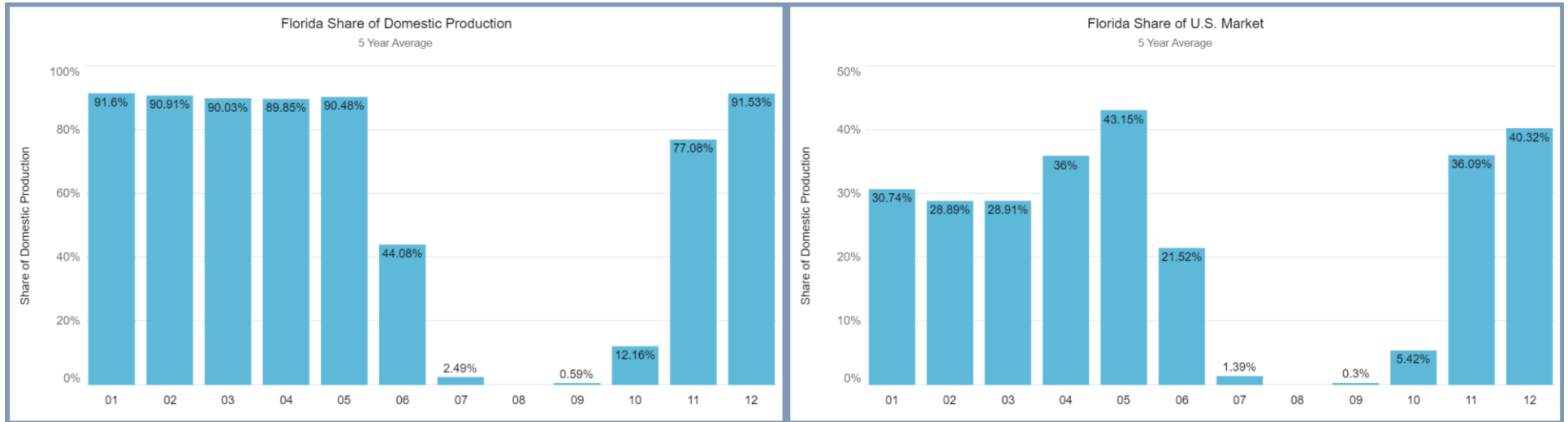
The following charts utilize USDA Market News and the Salesforce Analytics platform commodity movement data to show Florida's market share (proportion of recorded shipments that originate within the U.S.) for selected commodities.

**Florida Domestic Market Share (Jan-Dec): 13.12%(2015-20).**



# July 2021 Domestic Market Share: Tomatoes (Round)

**Florida Domestic Market Share (Jan-Dec): 24.79%(2015-20).**



# July 2021 Domestic Market Share: Strawberries

Florida Domestic Market Share (Jan-Dec): 19.79%(2015-20)

