

MIAMI:

Gateway to America



Big city, bright lights, and busy ports

By Cristina Adams

Few cities in the United States are as culturally and ethnically unique as Miami. The city is known by a number of nicknames, ranging from the ‘Capital of Latin America’ to ‘Magic City’—though perhaps the most accurate is ‘Perishables Gateway to the Americas,’ referencing its expanding role as a hub of international trade.

Its name is a variation of *Mayaimi*, from an Indian tribe that lived around Lake Okeechobee in the 1600s, but its founding is credited to Julia Tuttle, a citrus grower. Miami is not only the sole major metropolitan area in the United States established by a woman, but its birth and evolution are firmly tied to the fresh produce industry.

Miami-Dade County, with more than 2,400 square miles stretching from Biscayne Bay to downtown Miami to Everglades National Park, boasts a population of nearly 2.6 million. Sixty-four percent of residents are Latino, and more than half of the total population is foreign-born. Here, at this vibrant intersection of languages, cultures, commerce, and food, more companies are finding it profitable to do business. In a word, Miami is *hot*.

County Growth & Local Initiatives

Miami-Dade isn’t alone in its growth. Surrounding counties including Broward (home to Fort Lauderdale), Monroe (which includes the Florida Keys), Palm Beach, and Collier are also booming, benefiting from South Florida’s post-recession economic reawakening. So is the agricultural industry around the state, though it is shifting. Among the beneficiaries are growers in the Miami-Dade area and in the Redlands region south of Miami near Homestead, which is one of the state’s major growing regions and the birthplace of the “Redland Raised” marketing initiative.

Launched in 2009 by area growers, Miami-Dade County, and the Florida Department of Agriculture & Consumer Services, the Redland Raised program and logo were designed to promote the purchase and consumption of hyper-local produce, fitting under the umbrella of the larger statewide “Fresh from Florida” agricultural branding program.

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As part of the initiative, Lakeland, FL-based Public Supermarkets, Inc. began carrying Redland Raised products, raising awareness of South Florida's fruit and vegetables including avocados, okra, green beans, squash, sweet corn and, of course, the state's famous tomatoes, as well as more exotic offerings like mangos, carambola, lychee, pitaya, and jackfruit.

According to Walter Vazquez, chief executive officer of Miami-based Freedom Fresh LLC, a full-service distribution and third-party cold storage company, Redland Raised may turn out to be exactly what consumers are looking for. "It's a great opportunity to support our farmers," he says, noting the program "seems to be popular, it has value, and 'legs.' And with food safety being such an important component, people want to understand where their produce comes from."

Ecoripe Tropicals, a Miami-based distributor and importer, sources both local and imported produce for its customers. Mark Holbik, vice president of the company, points out local growers provide Ecoripe with a range of specialty produce.

"We see the combination of both Homestead-grown produce and our own offshore programs as a great strength," he says. "Redland Raised is definitely not just for roadside stands."

Homestead's Brooks Tropicals, LLC, a grower-shipper, packer, and importer, goes a step further by growing its own brand of avocados, known as SlimCados, as well as starfruit and some Caribbean Red papaya in the Redland region. According to Mary Ostlund, the company's marketing director, Brooks also works closely with several Redland growers for passion fruit, guava, dragonfruit, and *boniatos* (often called Cuban sweet potatoes).

Big Picture Production

The bigger picture shows just how important agriculture is to the economy, not just locally but statewide. The state ranks seventh in the country in overall agricultural production, and second in fresh vegetables (behind California). In terms of acreage and value, Florida is again second only to California for vegetables, bringing in over \$1.1 billion in 2012, with a great deal of this wealth

attributed to tomatoes (in this category, Florida bests California).

The Sunshine State also outperforms all other states in citrus production and has the second-largest orange crop in the world (behind Brazil)—despite devastating bouts with canker and more recently citrus greening, which reduced seasonal output.

Though the state's battle with citrus greening (also known as HLB or *Huanglongbing* disease) has cost the citrus industry as much as \$4.5 billion in lost crops and thousands of jobs, there is hope and much needed support for the fight. In the spring of 2013, Coca-Cola Company announced it would plant 25,000 acres—or 5 million trees—in new orange groves across the state, to the tune of nearly \$2 billion. As the parent company of the Minute Maid line of juices, the company squeezes profits from about 96 percent of Florida's oranges. And in September, Bayer CropScience awarded \$200,000 in grant funding to help combat citrus greening through the Citrus Research & Development Foundation.

Aside from Florida's longtime dominance of the citrus industry, what might surprise some is that the state is also ranked first in the nation for sweet corn and squash production, and second in bell peppers, cucumbers, snap beans, and eggplant. Other surprises include a snapshot of fresh fruit, vegetable, and nut availability. Many assume Florida and especially Miami's temperate climate fosters year-round growth, but this is only true for a handful of commodities, including mushrooms, guava, papaya, and carambola—and not always on a consistent basis.

Other commodities like peanuts and oranges come close with more than three quarters of the year in production, but many of the much-in-demand produce items—both exotics and staples—are available only in short bursts of production due to growing conditions, such as spinach (March, April), blueberries (April, May), cantaloupe (April, May, June), watermelon (April, May, June, July), mangos (May, June, July, August), lychee (June, July), and longan (July, August)



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according to the Florida Department of Agriculture & Consumer Services.

Organics

Going hand in hand with locally grown produce is organics, and Florida, like many other states, has increased its acreage for fruit, but has seen some fluctuation in vegetable plantings. Over the last several years, organic fruit acreage rose dramatically from 3,541 acres in 2008

to 15,394 acres in 2011 according to data from the U.S. Department of Agriculture (USDA) Economic Research Service.

Although citrus acreage doubled during the period, the bigger news was the demand for exotic fruit—organic growers went from zero to over 6,000 acres devoted to subtropicals in 2010 and 2011—accounting for more than 40 percent of the state's fruit acreage.

The same kind of growth was not

found in organic vegetables; though acreage for both tomatoes and mixed vegetables increased from 2008 to 2010, total acreage fell slightly to 4,592 acres in 2011.

Clamoring for Tropicals

Not to be outdone by organics, the demand for tropical fruits has exploded over the past few years. Whether it's starfruit, papaya, passion fruit, carambola, or guava, consumers want more. New

FRESH FORUM

What are the toughest challenges facing Florida growers?

Rosann Cabrera, Bayshore Produce LLC

Competition from outside the country, including Mexico and Central and Latin American countries [where] they can grow the same things more cheaply because labor is less expensive, and the transit time is short.

Leslie Simmons, Dave's Specialty Imports

When it comes to blueberries, there are other countries like Mexico trying to produce and supply during the Florida window. Depending on their success, it could definitely make for a more competitive environment.

Fernando Fonseca, Olivia's Best, Inc.

The high cost of being a farmer. Between the cost of producing, regulation, and labor, they just might sell their land to developers as soon as construction takes off again. We have the weather and the facilities to grow product; we need to keep farmers in South Florida and not just build condos.

Mary Ostlund, Brooks Tropicals LLC

Suburban sprawl is probably the biggest challenge.

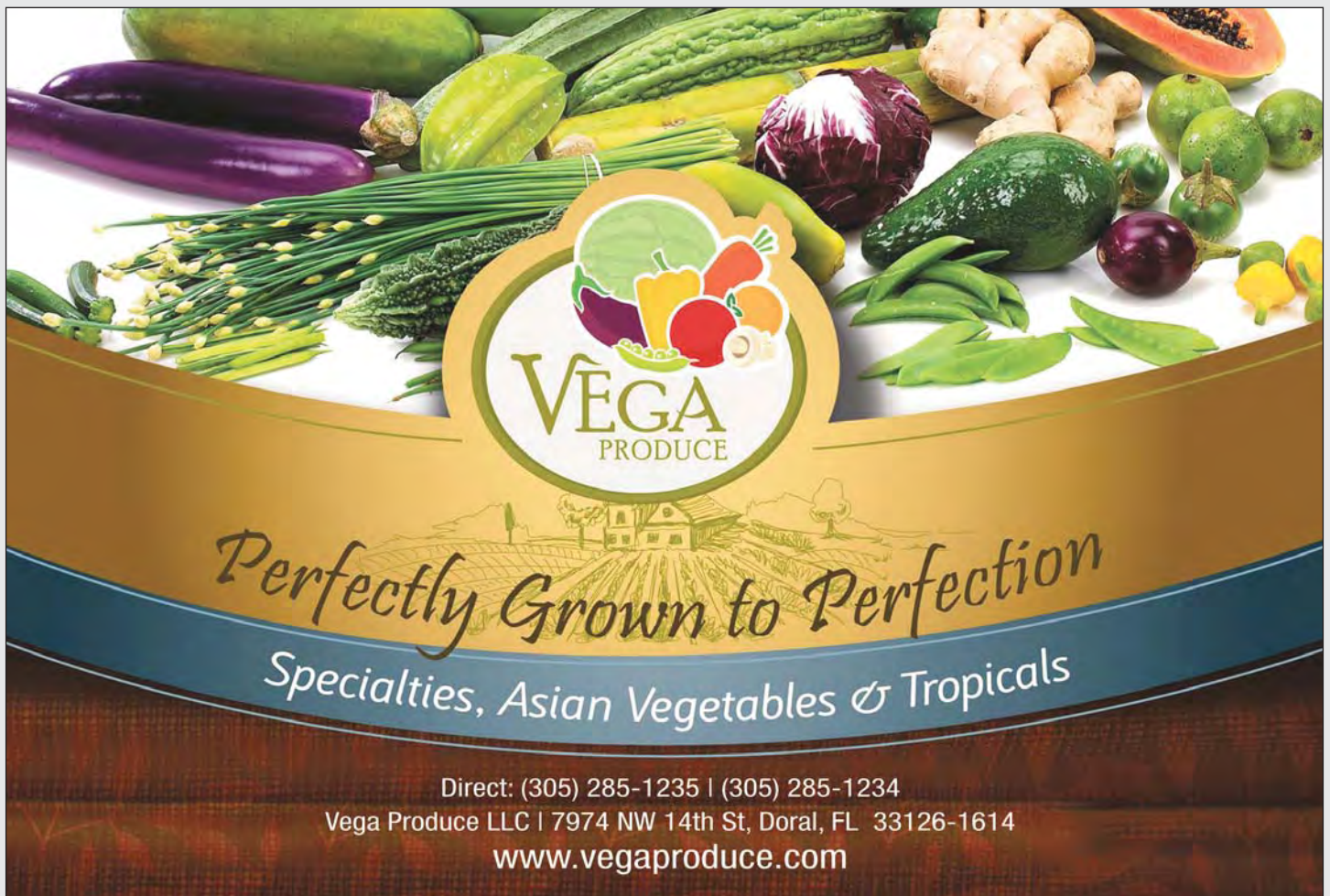
Walter Vazquez, Freedom Fresh LLC

Labor issues; it has always been a problem for growers. Because of immigration laws and the worker's visa program, it has become tougher to find skilled labor for operations. There are also the ever-evolving challenges of new requirements in food safety and traceability initiatives.

Timothy Henkel, Henkel and Cohen

Labor; for growers who need farm labor, they're complaining that it's hard to get Americans who want to do the back-breaking work. And nobody knows what's going to happen with Congress and immigration reform, which makes things even more difficult and unpredictable.

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markets, new outlets, and a wealth of nutritional information have helped push tropical fruit into the spotlight and onto the breakfast, lunch, and dinner plate. At Brooks Tropicals, production of its signature Caribbean Red papaya grew an impressive 33 percent in 2013, while production of Solo papayas doubled. Demand for starfruit also doubled in the last year. Forecasts for 2014 look to be equally strong, with double-digit growth projected for many of the company's tropical offerings. According to Ostlund, starfruit's unique shape when sliced (i.e., a five-pointed star) turns it into what she calls 'table candy,' in terms of both taste and looks—which is why photos are critical to any sales push.

As for why tropicals are suddenly the prom queen of the fruit world, Ostlund says it's simply a matter of consumers looking to increase how many fruits and vegetables they're eating through diversification. Rather than sticking to the traditional standards, they're branching out. It's not far, just an aisle or two over in the supermarket, but it's a whole new world of taste. And with proper merchandising,

many tropicals can become fan favorites.

"The great thing about tropicals is that they cover the gamut, in terms of size, price, and allure—and they're giving the old standards a real run for their money. Starfruit's appearance in the fruit bowl means that apples and bananas get some competition for a kid's grab-and-go snack," Ostlund says.

Changes & Challenges

Even with the improving economy, the industry faces ongoing challenges, from new regulations and consumer demand to higher transportation costs, supply chain issues, and increasingly dramatic weather events that affect product availability. Even mergers have an impact, as anything that happens on a large scale often creates a ripple effect.

Labor:

Uppermost for many Florida companies were stricter federal policies and standards governing produce traceability, as well as the ever-present and thorny issue of immigration law.

The federal government shutdown in

October exacerbated the labor problem for Florida grower-shippers, as H2-A guest worker visa petitions sat untouched for weeks while crops ripened in the fields.

Thousands of temporary workers were needed for harvests, but were nowhere to be found. After trade groups like the Florida Fruit & Vegetable Association approached the U.S. Department of Labor and urged action, some headway was made in the backlog, but workers were late to many of the Sunshine State's harvests.

Traceability:

For many companies, the question of traceability winds up being a costly one, as they invest in pricey warehouse management systems to implement the programs. "The most challenging part is uniformity on what needs to be done at the farm level across all countries and growers," says Leslie Simmons of Dave's Specialty Imports, Inc. "We have to be flexible to make sure we're meeting Produce Traceability Initiative standards as well as working fairly with our growers."

Fernando Fonseca, president at Olivia's Best, Inc., which imports and distributes produce from Costa Rica, Peru, Ecuador, and the Dominican Republic, points to the supply chain, noting how more customers want to know where and how the product was grown, how it was shipped, what kind of packaging was used, and whether it's safe to eat. "You want to make sure the product you give consumers is a good, clean, healthy product."

Transportation:

Some good news related to the supply chain, however, is the expansion of available shipping modes. Railex, the cold chain rail shipper headquartered in Albany, NY, announced it would open a new Florida facility in Jacksonville. The new hub will not only broaden the company's distribution network, but allow for express shipping throughout the Southeast to and from major markets including Atlanta and Miami.

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Green Express, will be offering refrigerated logistics services from Kingsbury, IN to the Port of Tampa. Green Express is partnering with CSX Transportation's Food & Consumer Products Group for direct, high-speed unit-train rail access to Tampa, with Chicago-based Iowa Pacific Holdings providing the refrigerated box cars. Once the service is up and running this spring, two express trains with trailer, container, and box car capabilities will run weekly from the Chicagoland area to the Port of Tampa, with planned expansion to an East Coast facility in Philadelphia, and eventually out to the West Coast.

On the ocean side of the shipping coin, Crowley Maritime Corporation and Seaboard Marine Ltd. joined forces to share vessels for a weekly service between South Florida (Miami and Port Everglades) to Costa Rica and Panama. Other news includes the creation of the Florida Perishables Trade Coalition, which launched a six-month pilot program for bringing cold-treated commodities from Peru and Uruguay directly into South Florida. Both cold-treated blueberries

and grapes have arrived in Miami, bypassing traditional routes to East Coast ports. If successful, the program will widen the scope to include other countries and perishables.

"The improvements and upgrades at PortMiami are beneficial for the whole industry. Once it's all up and running, it will be fantastic and great for business."

Weather:

Weather, too, is a constant topic. Across the board, growers, distributors, importers, and exporters agree that weather is the industry's biggest question mark; as usual, it can dictate a season's profits by creating either abundance or shortages. "Like anything else," says Vazquez, "we have to figure out a solution, but it's difficult to plan for."

A new book edited by University of Florida Institute of Food and Agricultural Sciences researcher Keith Ingram, *Climate Change of the Southeast United States:*

Variability, Change, Impacts, and Vulnerability (2013), says wild weather is something the industry should plan on, not only for the foreseeable future, but the rest of the twenty-first century. The book's authors believe unexpected, severe weather events will occur more frequently, especially in the southeastern United States—stretching from Virginia down to Florida, then west to Louisiana and up to Kentucky. The study also included Puerto Rico and the Virgin Islands as well.

Among the forecasts affecting the fresh produce industry were higher overall annual temperatures and more extreme heat days, but fewer cold and freeze days. Other predictions included higher sea levels, fewer yet more severe tropical storms and hurricanes, and declining air quality. Each of the variables could require growers to alter plantings and irrigation, as well as harvests, storage, and shipping patterns.

Legal Issues

In addition to rising costs and the weather, numerous legal issues have appeared on the area's produce trading landscape. According to Timothy Henkel, whose Miami firm Henkel & Cohen, PA specializes in produce business law, legal hiccups can occur when one party or another doesn't follow the USDA's Perishable Agricultural Commodities Act (PACA) regulations to the letter.

Other common legal issues that plague Miami businesses are the same ones that trouble produce companies across the country. According to Henkel, the top three are labor, immigration reform, and food safety, but the latter continues to be a thorny issue—especially since recent trends indicate buyers prefer to deal with growers and companies of a certain size. Equating size with safety, however, is a rather dangerous generalization as many smaller firms have already implemented strict food safety regimens and earned various certifications.

The 'size' perception can also pose problems for smaller operations or newer firms trying to make their way into the U.S. produce market after implementation of more recent trade agreements. It can be

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ProduceBusinessLaw.Com is the website of the Miami law firm of Henkel & Cohen, P.A. The website name was chosen by the firm's partners, Tim Henkel and Ira Cohen, to reflect the firm's dedication as counselors to and advocates for growers and marketing companies in the produce industry. Tim has been practicing law for 25 years including almost 20 years on behalf of produce traders. Ira has been practicing law for over 30 years and is a fluent Spanish speaker. The firm is available for consultation in the following fields:

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difficult and expensive for Central or South American grower-shippers to work with U.S. distributors in the first place, and with more stringent food safety requirements for foreign suppliers (as part of the Food Safety Modernization Act), these companies must invest in new or additional equipment and often add personnel and infrastructure to have their growing operations certified for sales to U.S. buyers.

All About Foreign Trade

Much of the boom in Miami-Dade is thanks to foreign trade. According to the

county's Department of Regulatory & Economic Resources, total trade for the county was \$96.5 billion in 2012, an 11 percent jump from \$87 billion in 2011. Imports through the county's two ports of entry—PortMiami and Miami International Airport—also rose about 19 percent during the same time period to \$39.6 billion. Exports rang in at nearly \$57 billion, a year-over-year boost of 6 percent.

Of the county's top 20 trading country partners, 15 are in Latin America with Brazil heading the list. South America is the area's largest regional trading partner; 43 percent of

Miami-Dade's international trade in 2012, about \$41.2 billion, came from South America with \$10.8 billion in imports and \$30.4 billion in exports.

After South America, in terms of trade dollars, but no less important to the Miami-Dade economy, are Central America and Caribbean countries. International trade with these nations rose to \$23.3 billion in 2012, up from \$20.9 billion the previous year and topping Europe's \$17 billion third-place showing.

At the state level, fruits and vegetables were among the top five agricultural exports in 2011. According to the Florida Department of Agriculture & Consumer Services, the Sunshine State accounts for \$207 million or 72 percent of all grapefruit exports; \$1.2 billion more or 62 percent of orange exports; \$296 million or 46 percent of bell peppers; \$631 million or 45 percent of fresh market tomatoes; and \$135 million or 44 percent of all U.S. snap bean shipments. And that's just the top five products.

Agriculture is also an economic powerhouse at the local level, generating \$27 billion annually for Miami-Dade and creating more than 20,000 jobs. And while the business environment proved challenging over the past couple of years for many, things were looking up in 2013.

"Because the economy wasn't great, people were being very careful with their spending, and that kind of slowdown affects everyone," says Vazquez of Freedom Fresh LLC. "Sales were up in 2013 as we saw a gradual improvement, and we're cautiously optimistic this positive trend will continue in 2014."

A Shrinking Terminal Market

The city's terminal market does not draw business from big foodservice companies and national supermarket chains as it is unable to accommodate the needs of the larger companies. As a result, it has evolved into an assortment of local mom-and-pop stores and smaller suppliers. Vazquez moved his own company out 13 years ago in search of larger, more up-to-date facilities.

"We were growing, and the market just couldn't meet our new requirements," says Vazquez, whose father spent 30 years on the Miami market. "You have some smaller

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niche players down there still, but...the bigger guys have all moved out.”

Fonseca at Olivia’s Best agrees, noting that the big chains and wholesalers tend to make their purchases directly from packing houses. Even though the market still serves businesses that buy in smaller pallet quantities, it can’t compete with the markets in Los Angeles or New York.”

Port Improvements

The area’s ports remain a key component in the industry—where the pace is already brisk and accelerating.

PortMiami, the “Perishables Gateway to the Americas,” is the county’s second-largest moneymaker, where trade with South and Central America and the Caribbean accounted for 54.3 percent of the port’s cargo

business in 2012. Much of this trade was in fruit and vegetables, with asparagus, snow peas, melons, and mangos leading the charge.

There are also plans to make the port a global logistics hub; to that end, more than \$2 billion in private and public funding has been invested in various infrastructure projects, including railway restoration, a tunnel, and channel expansion.

Slated for completion this summer, the Port Tunnel will link port facilities with the state’s interstate highway network to reduce traffic in downtown Miami and cut vehicle emissions from the estimated 16,000 vehicles that travel in and out of the port every weekday.

The Deep Dredge project will expand the port’s channel depth from 42 to 50 feet, making PortMiami the only U.S. port south of Norfolk, VA able to accommodate the huge cargo ships passing through the enlarged Panama Canal. The Deep Dredge is scheduled to wrap up late this year, ahead of the Panama Canal’s 2015 deadline.

Port Everglades, located north of Miami in Broward County, is already known as a hub for the cruise industry. In its renovated cruise terminal, the port hosts 10 different cruise

PortMiami Meets ELMO and CEE

While Sesame Street’s Elmo has long been a favorite of young children and more recently became a darling of the produce industry’s new initiative with First Lady Michelle Obama, PortMiami has embraced an altogether different animal—the ELMO Project, standing for Enforcement Link to Mobile Operations—launched in 2012.

By partnering with U.S. Customs and Border Protection (CBP) and private investors, PortMiami sped up its import process for fresh fruit and vegetables with the implementation of the ELMO Project, which consisted of handheld devices to scan and process information in real time. The new program allowed perishables to pass through the inspections process—getting the loads to waiting trucks or railcars in minutes, rather than hours or days.

PortMiami also doubled its fumigation capabilities and increased refrigerated storage units to more than 1,000 to maintain the cold chain, enabling the port to process more than 900 refrigerated containers per day.

In addition to ELMO, PortMiami was also designated as the U.S.’s only Customs “Center of Excellence and Expertise” (CEE) for agricultural products. Developed by the U.S. Customs and Border Protection, the CEE program was created to coordinate and streamline the import/export process for registered businesses with significant volume entering the country.

Ten such centers—each dedicated to a particular facet of trade (i.e., pharmaceuticals in New York, NY; machinery in Laredo, TX; consumer products in Atlanta, GA; etc.)—operate at major ports of entry throughout the United States.

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lines and over four million passengers annually. But it also handles more than 5.2 million tons of containerized cargo per year, making it the twelfth-largest container port in the United States, bringing in about \$18 billion per year in foreign trade.

Like PortMiami, this terminal recently underwent an extensive multimillion-dollar expansion. For many companies, the port projects are good news for the bottom line. "These improvements greatly facilitate the flow of imported produce, which is key to our success, and have a definite positive impact on our business," says Ecoripe's Holbik. "Both ports do an amazing job of expediting the import process for our fresh produce."

Frank Ramos, of The Perishable Specialist, Inc., agrees. His company, a customs brokerage specializing in fresh produce, does about 35 percent of its business through PortMiami; the remaining 65 percent comes by air through Miami International Airport. As far as he's concerned, the city has worked to develop a both comprehensive, reliable infrastructure and system for importing perishables.

"The improvements and upgrades at PortMiami are beneficial for the whole industry," Ramos says. "The Deep Dredge will allow super vessels to come in with more containers, and the tunnel will give truckers extra access for coming in and out of the port. Once it's all up and running, it will be fantastic and great for business."

Rosann Cabrera, who manages Bayshore Produce LLC, recently opened a second office in Tampa to handle imports and says PortMiami officials have been enthusiastic about helping her expand the business. Bayshore Produce began exporting about four years ago, and while Cabrera says there has been little change in that side of her business, in imports, "there's been a huge improvement" with port personnel willing and eager to go the extra mile.

"We really need these improvements," confirmed Freedom Fresh's Vazquez, who delivers to cruise lines on-site and also has customers shipping through the port. "Anything that makes us a viable entry point can only help."

Future Trends

The future of Miami's produce industry is anyone's guess—though most believe the city will continue to dominate imports of

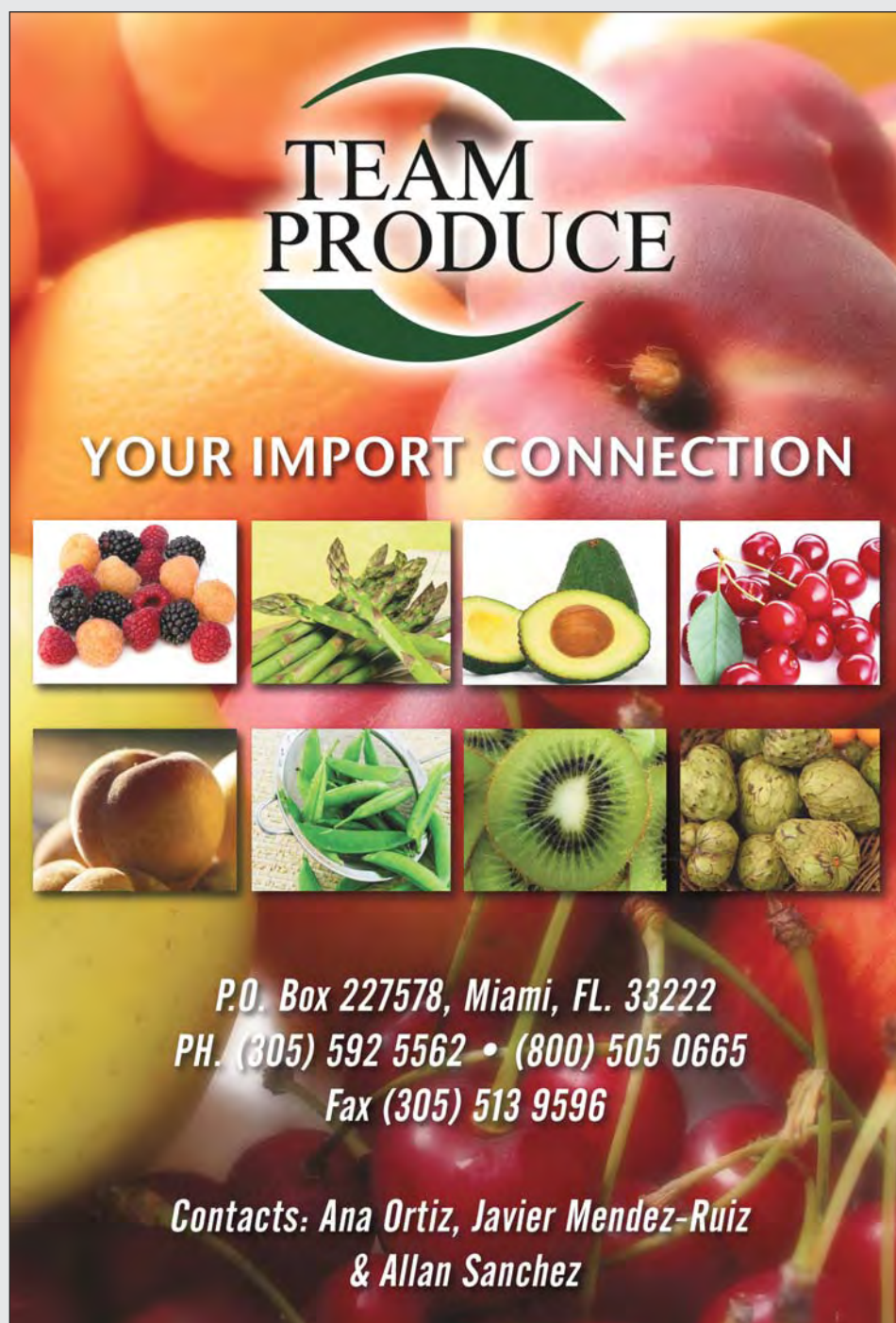
fruit and vegetables. Area growers will continue to take their cues from consumers, as demand for organics and tropical fruit increase, and retailers promote seasonal locally grown commodities.

Holbik at Ecoripe Tropicals acknowledges the ongoing interest of consumers in the health benefits of produce. With shoppers becoming more and more conscious of how their food-buying decisions affect their health, he says, "When we do in-store demonstrations of some of our exotic fruits," he notes, "we need to make sure the information reaches them."

Social media, too, is transforming how





companies approach their customers, as detailed information is available through a variety of channels. Who shops for what is also evolving. "Data shows that male shoppers and empty-nesters are shopping more," says Simmons of Dave's Specialty Imports. "This is forcing us to look beyond the traditional single target of 'Mom' as the only shopper for fresh produce." **BP**





Cristina Adams is a freelance business writer and editor with more than eighteen years of experience. She writes for a number of business publications and websites.



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