

JUNE 27, 2025

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# ON THE H O R I Z O N

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industry updates

**CROP &  
MARKET**  
INDUSTRY INFO





# MARKET UPDATES

## ROMA TOMATOES

Eastern roma tomato volumes are currently very limited as the Quincy and South Georgia crops wind down. Relief is on the horizon, however, with Tennessee expected to begin harvesting in the latter part of next week. As Tennessee ramps up and additional local deals get underway, we anticipate more consistent, moderate to strong supply across the Eastern region. On the Western side, roma production is now coming from both Mexico and California. West Mexico is nearing the end of its season and will likely finish up within the next week, with production shifting to Baja and Central Mexico. Baja is currently offering moderate volumes, and while quality has generally been fair to good, we expect volumes to remain steady to slightly lighter as some growers finish up and others get started. Central and Eastern Mexico are also seeing new fields come online, adding to existing production in Jalisco, which should gradually increase available supply. Domestically, several California growers—including Lipman—are now active in the San Joaquin Valley. Supply is moderate at this stage, and while some fruit has shown light wind scarring, overall quality is good with firm texture and solid shelf life.

## ORGANIC ROMA TOMATOES

With West Mexico now finished for the season and Baja not fully into production, organic roma tomato supplies are lighter this week and quality has been fair to average. We expect to see improvement in availability and quality over the coming weeks as additional growers begin harvesting in Baja. Central Mexico is also set to come online next week, which should help bolster supply and stabilize the market heading into mid-summer.

## ROUND TOMATOES

Despite being in a transitional phase, round tomato supplies remain adequate in the Eastern U.S. South Carolina and the Quincy, FL area are in the final stages of their seasons, with some growers expected to wrap up by next week. Looking ahead, Tennessee is poised to begin harvest around July 7th, with Virginia following shortly after. Overall quality in the East has been good, especially with careful packing practices. In the West, Baja, Mexico and California are currently leading production. Baja continues to provide consistent supply with solid quality, while Eastern and Central Mexico are contributing lighter volumes with fair to good quality. California, however, is experiencing an abundance of round tomatoes this week. Most growers are now in full harvest, and quality has improved significantly following some early-season challenges. Lipman's farms are expected to start right after the July 4th holiday, which will further boost availability and keep the market well supplied.

## ORGANIC GRAPE TOMATOES

Organic grape tomato supply is holding steady, with most production currently coming out of the Baja region and additional volume from Central Mexico. Quality has been consistently good from both areas, though there have been occasional concerns with color uniformity. As the conventional grape tomato market tightens, some of that demand is beginning to shift toward organic, which could put added pressure on supply for the short term.

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## GRAPE TOMATOES

Grape tomato supply has lightened up in the East this week. Lipman's South Carolina fields are winding down, and we've now moved out of older plantings, effectively reducing available volumes. Meanwhile, Virginia crops have gotten off to a slower-than-usual start, with early harvests producing lighter yields than expected. We anticipate supply to improve over the next few weeks as additional plantings come into production. Quality in customer-packed product has been good overall, though packouts have shown some variability. In the West, West Mexico is mostly finished for the season, shifting supply to Baja and Central Mexico. Baja appears to have fewer grape tomato acres planted this year, which could mean reduced availability in the short term. That said, Baja is currently producing the best quality fruit. Central Mexico's volumes remain light for now, but with new fields just starting, we're optimistic supply will increase steadily as we move into July.

## MINI SWEET PEPPERS

Mexico's mini sweet pepper production continues its transition from West Mexico to Baja and domestic areas. Baja's fruit is not quite ready but should come online in the next 2 weeks. Some product has also been available from California but they are in a slight gap at the moment. British Columbia has a few growers with light volumes, but most of that product is under contract, providing little to the open market. Quality has been varied as supply tightens up and growers stretch to meet demand. Looking ahead, we'll see production in Washington State in mid-August.

## ZUCCHINI AND YELLOW SQUASH

Squash volumes are a bit lighter in the East this week, particularly on yellow squash. With our coastal North Carolina program now finished and Georgia mostly wrapped up, we're in a transitional period awaiting increased volume from more northern regions like New Jersey and Michigan. Excessive heat in New Jersey has impacted yields, though the early quality remains good. There are also some local pockets of production, but much of that supply stays close to home. We anticipate improved volumes—especially from Michigan—over the next week as more growers come online and others move deeper into their harvests. In the West, supply has tightened somewhat out of Santa Maria, Fresno, and Baja as growers work through a lighter production window. This trend is expected to continue for the next 2–3 weeks. Fortunately, our Washington partner is harvesting strong volumes of both yellow and zucchini squash, with excellent quality, helping to meet regional demand during this period of tighter supply elsewhere.

## CHILI PEPPERS

Chili pepper supply has lightened in the East as Georgia's season winds down and new regions are either just beginning or still waiting to start. As we move into the summer months, expect to see small pockets of production from various local deals, with more consistent and substantial volume anticipated from Michigan beginning in late July. In the West, chili peppers are available from Baja, Central Mexico, and California. All major varieties are being harvested, but current volumes remain light on jalapeños, poblanos, and Anaheims for the time being. Tomatillo quality has been a recent concern, but the outlook is improving. New fields in Central Mexico are coming online with good quality fruit, helping to complement Baja's lighter but consistently strong output. Quality overall has been solid, though supply remains limited in the near term.

## PICKLING CUCUMBERS

Pickling cucumber supply is currently light in the East. Limited volumes remain in Georgia, and Kentucky has just begun with small harvests. Most of the region is now in a waiting period, with local production expected to begin soon in areas like North Carolina, New Jersey, and New York. In the West, the market is in the midst of a near-gap. California has only a trickle of supply at the moment, and the Mexico season has concluded. However, we anticipate relief soon as our Washington State partner has just started harvests and should bring consistent volume to meet our customer needs.

## EGGPLANT

As Georgia approaches the end of its season, eggplant volumes are beginning to decline, though quality remains strong. Lipman's North Carolina program kicked off this week in a light way, with increased volume expected over the next 5–7 days. Early quality reports are promising, and we anticipate nice-looking fruit as the harvest progresses. Several local programs are also set to begin in early to mid-July, which will help expand Eastern supply in the coming weeks. In the West, the majority of eggplant production is centered in the Fresno, CA area, where both supply and quality have been consistent.

## ENGLISH CUCUMBERS

English cucumber availability is solid this week, with steady supplies coming from Eastern and Western Canada, along with limited volumes from year-round producers in Central Mexico. Quality and sizing have both been strong across all regions, with product arriving clean and well-formed. This positive trend is expected to continue in the near term.



## CONSUMERS' LOVE AFFAIR WITH LOCAL PRODUCE

[THEPACKER.COM](https://thePACKER.com)

JUNE 27, 2025

Consumers love locally grown produce, with 2 in 3 saying they feel strongly about buying local fruits and vegetables. An annual survey examining shopper purchasing behavior in fresh produce also revealed that households with kids are especially keen on purchasing local, with 79% of households with kids at home saying they feel strongly about buying local produce, compared to 60% of households without kids. Regionally speaking, consumers in the Northeast (74%) and South (68%) are most likely to feel strongly about buying local, compared to 65% of both Midwesterners and shoppers in the West.

But the survey also shows that consumers are feeling the effects of inflation and higher grocery prices, which for some may present a barrier to purchase. The survey asked: "If price was not an issue, which of the following items would you purchase more of? Please select all that apply." Respondents selected from a list that included locally grown and organic, among other produce items. Fifty-eight percent of consumers indicated they'd buy more locally grown produce if price were not an issue, and 55% indicated they'd purchase more organic fruits and vegetables.

Having children in the household also proved a powerful driver of locally grown produce purchase, with more than twice the number of households with kids (51%) than households without kids (24%) reporting they'd purchased more local produce than a year ago. The highest rate of consumers who reported buying more locally grown produce than a year ago was in the Northeast (41%), compared with 36% of those in the South, 32% in the Midwest and 30% in the West. While throughout the survey men and women responded similarly, the gender divide was most dramatic on the question of whether consumers are purchasing more local than a year ago. Forty-two percent of men indicated they are buying more locally grown produce, compared to just 29% of women.



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## TRADITIONAL GROCERY STORES HOLDING GROUND AGAINST FIERCE COMPETITION

[THEPRODUCENEWS.COM](https://theproducenews.com)

June 27, 2025

From farmers markets to bodegas, consumers will shop anywhere and everywhere to get the exact item they want. This has made life increasingly difficult — and uncertain — for traditional brick-and-mortar grocery stores. Rising prices and declining consumer confidence aren't helping. Despite these challenges the grocery sector has shown resilience, with consistent year-over-year growth in foot traffic. The growth is encouraging and indicates a strong underlying demand for grocery shopping.

The shopping trends are interesting as consumers are making more frequent grocery trips but spending less time in stores reflecting a shift toward shorter, more-efficient shopping experiences. This trend suggests a need for grocery operators to adapt their store layouts, such as optimizing layouts and promoting grab-and-go areas for a more efficient quick-trip experience.

Traditional grocery chains still command over 70 percent of total grocery store foot traffic, yet value grocery chains have increased their visit share from 14.8 percent in Q1 2022 to 16.6 percent in Q1 2025. Fresh-format grocery stores are also gaining traction, particularly among remote workers seeking convenient lunch options. Despite fierce competition from discount and dollar stores, wholesalers and general mass retailers, the grocery segment has steadfastly preserved its share of the overall food-at-home visit pie.

The aforementioned fresh-format stores, along with ethnic-focused grocery stores, are emerging as significant players in the market, reflecting changing consumer interests and demographics. This trend presents opportunities for expansion and targeted offerings. Smaller grocery store formats are also doing well, outperforming larger stores, indicating a consumer preference for convenience and quick shopping trips. This trend suggests a potential shift in grocery retail strategies. Shorter trips to smaller stores align with decreasing dwell times, as consumers prefer quick errands.

The big takeaway: Even as consumers flock to alternative food purveyors in search of lower prices, grocery stores aren't losing ground — and on a nationwide level, they remain the biggest player by far in the food-at-home shopping space.



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# UPCOMING EVENTS:

**JULY 9-10**

**ORGANIC PRODUCE SUMMIT**

**MONTEREY CONFERENCE CENTER  
MONTEREY, CALIFORNIA**

<https://www.organicproducesummit.com/en/home.html>

**JULY 31 - AUG 1**

**IFPA FOODSERVICE CONFERENCE**

**MONTEREY CONFERENCE CENTER  
MONTEREY, CALIFORNIA**

<https://www.freshproduce.com/events/the-foodservice-conference/>

## TOMATO SNAPSHOT



AT LIPMAN, WE  
LOVE GIVING  
BACK. HERE'S  
A RECENT  
MOMENT THAT  
MADE A  
DIFFERENCE.

