

JULY 25, 2025

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INDUSTRY INFO





# MARKET UPDATES

## ROMA TOMATOES

Eastern roma tomato volumes remain stable, though supplies have not yet reached peak. Tennessee, currently the largest contributor in the East, has begun harvest, but initial yields from early plantings have been lighter than average due to a prolonged period of frequent rain during the growing cycle. As the season progresses and farms move past the most affected plantings, volumes are expected to improve week over week. In addition to Tennessee, smaller pockets of production are coming from Arkansas and North Carolina, among others. Out West, roma tomato production is ongoing in Baja, Central Mexico, and California. Baja's output has been consistent, though Spring acreage is winding down in areas like Vizcaino, while regions such as San Quintin and Ensenada are seeing gradual volume increases. That said, summer acreage tends to be lighter overall, so total volume is expected to remain below seasonal highs. Central and Eastern Mexico continue to produce solid volumes with good quality, and steady supply is anticipated in the coming weeks. California roma fields are contributing stable volumes as well, with larger sizing and generally strong quality, though there have been occasional issues with color consistency.

## TOMATOES ON THE VINE (TOVs)

While there is some TOV production in Central Mexico, the majority of current volume continues to come from Canadian greenhouses. Availability has been strong and consistent in recent weeks; however, several Canadian growers are approaching a gap in production, which is expected to reduce overall volume in the coming weeks. We anticipate a temporary tightening in supply until new crop cycles come into full swing.

## ROUND TOMATOES

Eastern round tomato volumes are generally lighter than normal for this time of year, largely due to excessive rainfall across multiple growing regions. Key production states like Virginia and Tennessee are in season, but yields remain light with quality holding at average levels. Additional supply is coming from North Carolina, Arkansas, and other scattered Eastern areas, though weather has impacted overall consistency. A return to more stable conditions is expected to help production return to more typical levels as we move forward. Out West, round tomato availability continues in Baja, Central Mexico, and California. Baja is currently harvesting from three main regions, offering good overall volume and quality, though some aged inventory is being monitored. Central and Eastern Mexico are producing moderate supplies but have seen some weather-related issues affecting fruit condition. Improved weather should support stronger harvests ahead. California production remains steady, with most growers forecasting consistent supply in the coming weeks. Fruit sizing has skewed larger, and overall quality has been solid.

## ORGANIC ROMA TOMATOES

Organic roma tomato supply is showing signs of improvement as production in Baja picks up slightly and Central Mexico continues to hold steady. Quality has been consistently good from both regions, and with favorable growing conditions, we expect overall availability to strengthen in the coming weeks.

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## GRAPE TOMATOES

After a slow and snug start to the season, the Eastern U.S. is now seeing improved volume on grape tomatoes. Virginia, a key production area, has been lighter than usual early on but is beginning to pick up, with steady supplies expected moving forward. Despite ongoing precipitation, overall quality has remained very good. Additional volumes are also coming from North Carolina, Tennessee, and other surrounding regions, contributing to a stronger overall supply picture. In the West, grape tomatoes continue to be harvested in both Baja and Central Mexico. Baja's production is expected to remain stable over the next few weeks, while Central Mexico should see a modest uptick in volume as more growers come online.

## ENGLISH CUCUMBERS

English cucumber production continues to be on the lighter side in Eastern Canada as growers move through their planting cycles. However, Western Canada is providing steady supply with good quality. In addition, there are light volumes coming out of Central Mexico from select hothouse growers that offer year-round production.

## MINI SWEET PEPPERS

Mini sweet pepper supply remains in the typical summer lull. Mainland Mexico is largely finished for the season, but there is limited availability in parts of Central Mexico. Baja has started up but is producing minimal volumes so far; better numbers are expected in the next 2–3 weeks. California, after a brief production gap, is now back in fruit, which will help bridge the current supply shortfall. Modest volume increases are anticipated as we move into August. Additionally, Washington production is on the horizon, with harvest expected to begin around August 15th.

## GREEN BEANS

Green bean supplies remain tight in the East as growers face production challenges. Frequent rains during the planting cycle have led to inconsistent harvests, with many growers experiencing skips early in the season. Currently, limited volumes are being harvested in Virginia and New York, while Michigan is expected to begin production shortly, which should help ease supply constraints. On the West Coast, volumes are also mostly steady. Central Mexico, Baja, Santa Maria and Santa Maria, California are contributing modestly, with Baja currently delivering the best quality. Meanwhile, our Washington State local partner is in steady production and helping to meet local and regional demand with consistent supply and solid quality.

## CHILI PEPPERS

Chili pepper supplies in the East remain light and scattered, with no single region producing significant volumes at this time. This situation is expected to improve in the next 7–10 days as Michigan begins its season. In the meantime, cubanelles and serranos are particularly tight during this transitional period. In the West, supplies are more stable, with the strongest volumes coming from California and Baja, while Central Mexico also continues to contribute. Baja remains in light production, especially on poblanos and serranos. California growers are offering good-quality jalapeños with decent volume, though other varieties remain limited. Habaneros continue to be the most challenging item, as they typically start a few weeks later than other chili types. In the Pacific Northwest, our Washington State partner is set to begin harvest at the end of this week on all chili varieties except poblanos and habaneros, which are expected to come online in another 2–3 weeks. Overall, supplies are gradually improving, with stronger availability expected by mid-August.

## WATERMELON

Watermelon volumes remain light, even as several new growing regions come into production. Georgia and South Carolina are effectively finished for the season, with harvest now shifting to areas such as Indiana, Delaware, Maryland, and North Carolina. Most of these regions are off to a slower start, largely due to rain during the growing cycle, which has impacted early yields. Quality has been generally acceptable across the board, with Indiana standing out for particularly nice fruit so far.

## GREEN BELL PEPPERS

Green bell pepper supplies remain tight in the Eastern U.S. this week, but improvements are on the horizon. Michigan has officially begun harvest, and volumes are expected to ramp up steadily over the next 7–10 days. This will significantly boost availability alongside current light volumes from New Jersey, North Carolina, Tennessee, Kentucky, and other regional growers. Most Eastern growing areas are running slightly behind schedule, but production is expected to increase in the coming weeks as more fields finally come online. Out West, harvest has begun in the Fresno and Selma regions of California, with volumes anticipated to strengthen as operations reach full speed. Quality from California remains strong, consistent with typical early-season performance. Additionally, light production has begun in Washington state, adding another source of domestic supply. Overall, while the market remains snug in the short term, volume recovery is expected soon from both Eastern and Western growing regions.



## WHAT AMERICANS WON'T GIVE UP IN 2025: SPENDING PRIORITIES REVEALED

[PRODUCEMARKETGUIDE.COM](https://www.producemarketguide.com)

JULY 22, 2025

In the face of persistent inflation and tighter household budgets, Americans are making it clear where they refuse to cut corners. According to a study that analyzed spending behavior, inflation data and consumer sentiment, fresh produce emerged as the top-ranked category in consumer resilience. Meat and dairy tied for the second spot. The study outlines what Americans are valuing most and why, and the findings reflect a cultural shift in what Americans now see as worth preserving, despite cost.

Regardless of modest inflation at less than 1% year over year, fresh produce tops the list of categories U.S. consumers won't give up. Its high resilience score is driven by strong purchase intent, frequency of shopping trips and its perceived essentiality in everyday meals, the study shows. As shoppers become more selective, they're doubling down on foods that deliver both health benefits and value. Fruits and vegetables aren't just nutritional staples, as they're increasingly seen as foundational to personal wellness, family meals and cost-effective cooking.

Produce wins the resilience race because it rides the strongest cultural current of all: America's healthy-eating movement. From school lunch norms to TikTok 'fridge-restock' videos, fresh fruit and veg have become status markers of well-being. Shoppers tell us, 'If I'm going to spend more anywhere, it should be on what keeps my family healthy.' That mind-set—plus sub-1 % inflation—makes produce the one category consumers refuse to trim.

Retailers and growers alike can take heart: Produce is no longer just a side dish; it's central to how consumers define health and quality of life in 2025. This prioritization opens the door for creative merchandising, meal-planning partnerships and continued investment in quality, freshness and storytelling around seasonal and local offerings. In a landscape of economic uncertainty, the produce aisle remains one place where shoppers continue to say "yes."



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## FOODSERVICE REPORT: HEALTH TRENDS DRIVE PRODUCE INNOVATION

[PRODUCEMARKETGUIDE.COM](https://www.producemarketguide.com)

July 15, 2025

Health trends are increasingly shaping the foodservice industry, with fresh produce now taking center stage on menus as consumers seek healthier, functional and sustainable meal options. Industry leaders note a shift toward plant-forward dishes and "food as medicine" philosophies, where items like avocados, kale and cucumbers are valued for both nutrition and hydration. There is also a strong emphasis on freshness, transparency, and sustainability, with foodservice buyers demanding produce that is both high quality and has a longer shelf life -- spurring adoption of solutions that extend freshness without adding complexity.

Fresh produce is the foundation of a growing number of menu strategies across the foodservice landscape. Whether it's a fast-casual bowl packed with greens and grains or pre-cut convenience packs, foodservice is rising to meet the consumer demand for health and sustainable products. Foodservice is an important driver when it comes to shaping how consumers think about produce. A lot of people try new fruits or vegetables for the first time in a restaurant. When something like roasted cauliflower or a peach salad shows up on a menu and people enjoy it, they often look for that item later at the grocery store. So, restaurants aren't just serving what people ask for; they're teaching people what to want. At the same time, foodservice uses a huge volume of produce in its own right.

As people have returned to eating out post-pandemic, we've seen fresh produce become more central on menus, and not just a garnish or side, but part of the main dish. There is a pressure to keep that produce fresher, longer, and to waste less of it.

Health and wellness are shaping what people want to eat — That means more demand for produce that's not just fresh, but functional — think avocados, kale, cucumbers, things with hydration or nutritional benefits. Food as medicine is real, and produce plays a starring role.



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# UPCOMING EVENTS:

**JULY 31 - AUG 1**

**IFPA FOODSERVICE CONFERENCE**

**COME SEE US AT BOOTH 605!**

**MONTEREY CONFERENCE CENTER**

**MONTEREY, CALIFORNIA**

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

**SEPT 10 - 13**

**SEPC SOUTHERN INNOVATIONS**

**CHARLOTTE CONVENTION CENTER**

**CHARLOTTE, NC**

**<https://seproduceouncil.com/events-networking/southern-innovations/>**

## TOMATO SNAPSHOT



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TOMATOES!

