

AUGUST 29, 2025

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CROP & MARKET

INDUSTRY INFO





MARKET UPDATES

ROMA TOMATOES

Lipman's Tennessee roma tomato crops continue to deliver steady volumes and good quality to the Eastern market. Harvesting this week has included some excellent crown picks, showing good sizing and consistent color. In addition to Tennessee, smaller volumes of romas are also coming from Canada, Michigan, Alabama, and North Carolina, helping to supplement supply across the region. Barring any significant weather events, production from the more southern areas is expected to continue through early to mid-October, at which point North and Central Florida will begin their fall harvests. Out West, Lipman's California roma fields are also producing steadily, with very good quality reported. While sizing has dipped slightly due to recent heat, most fruit remains in the XL to L range. Additionally, both Baja and Central Mexico continue to provide solid roma supplies, which are anticipated to hold steady into September. Overall, market supply is strong, and quality remains high across key growing regions.

ROUND TOMATOES

Round tomato volume is picking up in the East this week as fall crops come online in both Tennessee and Virginia. Tennessee's production has strengthened slightly compared to recent weeks, with fruit showing good quality and somewhat smaller sizing. Virginia's new plantings are just beginning to harvest, and volume is expected to ramp up steadily over the next week. Early picks from Virginia are showing promising quality with a nicely balanced sizing profile. Additional round tomato supplies are also available in smaller volumes from regions like North Carolina. In the West, supplies remain moderate, with product coming from California, Baja, and Central Mexico. Lipman's California harvests have been consistent, producing mostly larger-sized fruit with strong quality. Both Baja and Central Mexico continue to provide moderate volume, and current forecasts suggest these regions will maintain steady availability into September. Overall, supply across growing regions is stable, with solid quality and regional transitions helping support market needs.

GRAPE TOMATOES

Grape tomato volumes have improved in the East. Lipman's Virginia farms have transitioned into their fall plantings, resulting in stronger production and more comfortable volume levels. Quality has been solid overall, with only a few splits being graded out during packing. Additional supply is coming from a range of smaller operations in Tennessee, Alabama, and Canada, among others, helping to round out Eastern availability. In Mexico, Baja growers are harvesting both existing acreage and newly planted fields, maintaining consistent production. Similarly, growers in East/Central Mexico are harvesting from a mix of new and established fields, and no major quality concerns have been reported. Overall, supply and quality are holding steady across regions as we head into September.

TOMATO ON THE VINE (TOV's)

Tomato on the Vine (TOV) supplies remain very limited in Canada as growers transition to fall plantings. However, we are seeing more Mexican supply as growers get started with new crops. Supplies out of Mexico should continue to increase over the next few weeks as new plantings come into production and fall programs ramp up.

GREEN BELL PEPPERS

Bell pepper production remains consistent across the Eastern U.S., with multiple states—including Michigan, New York, North Carolina, and New Jersey—actively harvesting. Overall quality has been good, though some light discoloration has been observed due to recent weather conditions. These regions are expected to remain in production for several more weeks before the seasonal transition to southern growing areas begins. Out West, the Fresno/Selma region of California continues to deliver steady volumes and excellent quality. Washington State is also in season, offering attractive fruit to meet regional demand. Supplies are well-positioned to support continued movement as we head into early fall.

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YELLOW & ZUCCHINI SQUASH

Yellow and zucchini squashes remain widely available across multiple growing regions in the East. While some of the more northern programs in New York and Maine have finished for the season, good supply continues from New Jersey, Pennsylvania, the Carolinas, and other mid-Atlantic areas. Lipman's Eastern North Carolina program is just beginning its fall harvest, with appreciable volumes expected in the next 7 days. As is typical, zucchini quality has been consistently strong across the board, though New Jersey has produced excellent quality yellow squash this season. Production is expected to transition gradually southward over the coming weeks, with Georgia's fall crop already underway. In the West, Santa Maria remains the primary production hub, supported by additional supply out of Fresno and Baja. Overall, quality remains solid across all regions.

CUCUMBERS

Eastern cucumber supplies are lighter this week but remain sufficient to meet current demand. Product is available from key growing regions including Michigan, New York, and Canada, with additional contributions from smaller programs across the East. Fall harvests are on the horizon in Eastern North Carolina and Georgia, with production expected to ramp up within the next 7 to 10 days. Quality has generally been good, though some cosmetic defects have been noted. In the West, Baja continues to lead with steady supply and solid quality, while Central Mexico remains active with relatively consistent volumes. Looking ahead, we anticipate stronger movement out of Mexico as we progress into September, helping to bolster overall supply.

CHILI PEPPERS

Eastern chili pepper production remains scattered, with more consistent volumes coming out of Michigan, North Carolina, and New Jersey. In addition, small pockets of local supply are contributing to overall availability. While serrano and habanero volumes are still limited, most other chili varieties are available in adequate supply. In the West, chili production continues out of California, Baja, and Central Mexico, with local supply in Washington adding to the mix. Quality has been strongest in California and Washington, while heat stress in Baja has affected plant health and resulted in some quality challenges. Tomatillo quality has been below average in a few areas, but improvements are expected over the next two weeks as new fields begin harvesting.

EGGPLANT

Eggplant availability remains strong and consistent across the Eastern U.S., with steady supply coming from Michigan, New Jersey, and assorted local areas including Kentucky and New York. Overall quality has been good, with only a few isolated trouble spots noted. In about two weeks, we anticipate the return of Lipman's Eastern North Carolina program, bringing in fresh fall fruit as production begins its seasonal transition southward. Out West, the Fresno, California region continues to lead in supply, with solid volumes expected to hold through late October, when desert production begins. Meanwhile, our grower partner in Washington State is actively harvesting and delivering excellent-quality fruit to the Pacific Northwest. With multiple growing regions in production, eggplant supply and quality remain in a strong position heading into early fall.

HARD SQUASH

As more growers in the Northeast get up and running, the East's hard squash volumes are picking up. Currently, Michigan and Kentucky are leading the way in eastern supply but growers in New York and Maine are now in the mix as well. Overall quality has been good, though there have been a few trouble lots—particularly with spaghetti squash. Out West, supply remains strong and steady, with consistent production coming out of the Stockton and Fresno areas in California, as well as from Washington State. Quality and volume are both solid in the West and expected to remain stable in the near term.

GREEN BEANS

Green bean supply continues at a steady pace in the Eastern U.S., although cooler weather has recently slowed production in the more northern areas. Quality has been consistently good, with no major concerns reported. In the West, light to moderate volumes are being harvested in Baja and the Brentwood, California area, with additional light supply coming from Central Mexico and Washington State. Quality across all Western growing regions has been solid.

COLOR BELL PEPPERS

Colored bell pepper availability has improved slightly this week as new crops out of Central Mexico begin producing more consistent volumes. Western Canada continues to harvest steadily, offering good quality and a full range of sizing options. In contrast, Eastern Canada remains challenged, with output still limited due to earlier weather events and disease pressure. Field-grown red bells have been particularly tight, creating added demand pressure on hothouse red bells. Despite this, overall supply across all three colors—red, yellow, and orange—remains generally adequate to meet current demand.

MINI SWEET PEPPERS

Mini sweet peppers are readily available this week, with steady supplies coming from Baja, Central Mexico, California, and Washington. Quality has been particularly strong out of Washington, with clean, vibrant fruit, while product from the other regions is also performing well. With multiple growing areas in production, supply conditions are expected to remain favorable over the next several weeks, supporting consistent availability and solid quality across the board.

WATERMELON

Watermelon availability remains consistent this week, with solid supply coming from Indiana, and additional volumes in Maryland, Delaware, New Jersey, and Washington. While some growers in parts of Indiana are beginning to encounter quality issues, Lipman's Indiana crops continue to perform well, delivering strong quality and clean fruit. Production in Indiana is expected to continue through mid-September, with Lipman's South Carolina season set to begin on September 20th, ensuring a smooth regional transition.

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ORGANIC ROMA

Organic roma tomato availability remains steady, with consistent supply coming from both Baja and Central Mexico. New production has recently begun in Baja, which is expected to help improve overall quality moving forward. Current quality is generally good, particularly when fruit is harvested with lighter color, which has shown better performance through the supply chain.

ORGANIC GRAPE TOMATOES

Organic grape tomato supplies remain strong out of both Baja and Central Mexico, with consistent quality being reported across growing regions. Harvests in these areas are expected to continue steadily through November, providing reliable volume to the market. As the season progresses, production will gradually transition to Sinaloa, ensuring a smooth supply shift heading into the winter months.

ORGANIC VEG

YELLOW AND ZUCCHINI- Organic yellow and zucchini squash availability remains limited this week, though supplies have improved slightly compared to recent weeks.

BELLS- Organic green bell peppers are readily available this week, with steady supplies coming from California, Oregon, and Washington. All three regions are providing a good range of sizing options, and overall quality has been strong—particularly on fresh-picked fruit.

CUCS- Organic cucumber supplies remain snug overall, though availability has improved slightly out of Baja this week. Quality has been consistent, and volume is just enough to meet current demand.



FRESH FOOD CONTINUES GROWTH TRAJECTORY

[PROGRESSIVEGROCER.COM](https://www.progressivegrocer.com)

AUGUST 13, 2025

Things are definitely looking up in the grocery store perimeter, according to “The State of Fresh Foods 2025” report from [FMI – The Food Industry Association](#), which shows continued growth in this space. The [trade organization](#)’s new report delves into the steady momentum of fresh food items in 2024 and offers an optimistic look at the part that the department will play in the coming years.

“Consumer preferences continue to evolve, and as demand shifts, fresh foods are key for the food industry to meet customer needs,” noted Rick Stein, VP of fresh foods at FMI. “Shoppers’ focus on nutrition and health positions fresh foods as a sales driver in food retail moving forward, and it is essential for the food industry to respond and remain focused on cultivating fresh food departments that spur customer engagement and shopping appeal.”

FMI’s analysis indicates that fresh food is a major factor in the industry’s goal of exceeding expectations as a shopper destination. Perimeter departments are commonly used by food retailers to create a competitive advantage and attract shoppers to physical stores, as shown by 42% of sales coming from fresh sections in 2024. Retailers cited fresh food as a top priority going into 2025, along with successful innovative fresh product differentiation strategies.

Department narratives within the fresh food sector reveal a more nuanced story about these items as a growth driver in food retail. According to the report, the meat department is proving resilient in the face of economic worries by continuing to perform well. Just below meat, produce is also leading sales while enabling deep shopper engagement.

The sales growth in both departments shows that shoppers aren’t only spending more, but also buying more, with each department garnering 11% of total store sales.

Meanwhile, foodservice reached record-breaking sales of \$56 billion last year, affirming its role as a key differentiator for retailers in 2024. With shoppers focusing on quality and convenience, 87% of retailers leveraged fresh-prepared foodservice programs, and 63% saw success. Although seafood and bakery sales dipped slightly — by 1.2% and 1.4%, respectively — both departments remain strategic priorities because of their strong shopper engagement and experiential appeal. Retailers were homing in on quality, promotion and innovation to generate growth in these high-potential categories heading into 2025.

“Fresh food is at the heart of many of our most important operational strategies, driving workforce investments, technological advancement and customer engagement,” added Stein. “In 2025, foodservice is our top workforce expansion focus within fresh foods, with nearly a third of retailers planning to increase labor in this area. We’re also seeing fresh food play a leading role in e-commerce success — averaging 39% of online sales revenue — and in our tech investments, with growing use of inventory and demand-planning solutions tailored to the fresh perimeter. As consumers continue to prioritize health and nutrition, fresh foods remain essential to delivering the quality, convenience and experience shoppers expect.”

UPCOMING EVENTS:

SEPT 10 - 13

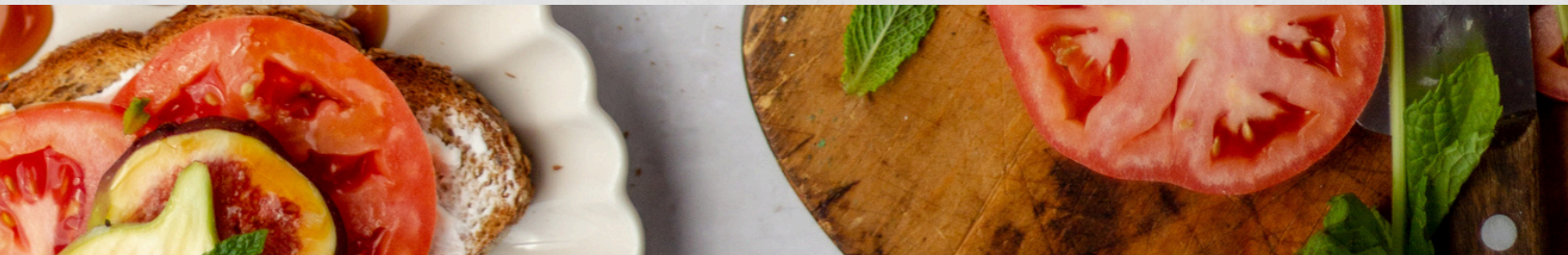
SEPC SOUTHERN INNOVATIONS

CHARLOTTE CONVENTION CENTER
CHARLOTTE, NC

OCT 16 - 18

IFPA GLOBAL PRODUCE AND FLORAL SHOW

ANAHEIM CONVENTION CENTER
ANAHEIM, CA



VEGGIE SNAPSHOT

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HIGHLIGHTS HOW SHE USES
HER LOCALLY GROWN LIPMAN
TOMATOES AND VEGETABLES IN
HER KIDS' AFTER SCHOOL
SNACKS!

