

SEPTEMBER 25, 2026

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CROP & MARKET

INDUSTRY INFO





MARKET UPDATES

ROUND TOMATOES

Round tomato supplies in the East are beginning to tighten again after a brief flush last week. Tennessee, North Carolina, and Michigan are all nearing the end of their seasons, and cooler weather is slowing maturity on the final plantings. Virginia is running at a steady light to moderate pace, with quality varying by lot; upcoming rain is likely to impact weekend harvests, and cooler temperatures afterward will further pressure production. Tennessee and Virginia are expected to wrap up around October 15. We anticipate some light volume out of south Georgia and north Florida to help bridge the gap until Ruskin/Palmetto begins in the first week of November. Repeated weather events have led to highly variable quality, but a good pack is still being achieved with careful sorting. In the West, California growers—including Lipman—are transitioning from Manteca and other northern districts down to more southern areas such as Los Banos. Some shippers are choosing not to migrate and are instead finishing for the season, so supplies are expected to be lighter but generally adequate through mid-October, when most programs will end. Baja's production has been moderate, skewing toward mid-sized fruit with fair to good quality; new acreage coming on in October should help boost volume. Central Mexico is running light to moderate and is expected to maintain similar levels over the next few weeks.

ORGANIC ROMA TOMATOES

Organic roma tomato supplies are short this week. Baja is in its final harvests with very limited volume remaining, which is contributing to the current tight market. Central Mexico is now the most reliable source, offering light volumes but good quality fruit with sizing skewed toward medium and large. Looking ahead, new crops are expected to start in Mainland Mexico in the next few weeks, which should help improve overall availability and provide better coverage for fall demand.

ROMA TOMATOES

Roma tomato supplies in the East are running light as Tennessee's season slows and most other regional programs have finished or are close to wrapping up. Tennessee is still offering a good mix of sizes and is expected to harvest through about mid-October; after that, Eastern availability will be very limited until Florida's Ruskin/Palmetto deal starts, currently projected around November 1. Expect the East to lean on Western romas for the last two weeks of October. In the West, California's roma production is also tapering off, with some growers already finished and others, including Lipman, planning to harvest through mid-October. Central Mexico and Baja are both in production with moderate volume and mostly good quality, though Baja fruit is generally showing a slight edge in appearance and condition.

GRAPE TOMATOES

Grape tomato supplies are on the light side in both the East and West. In the East, Virginia—our primary production region—is seeing lighter yields this week, and repeated rainfall is adding pressure on both volume and quality. Weather will be the key factor, but Virginia is still expected to finish around October 15, at which point supply will transition to the Ruskin/Palmetto region in Florida. With Virginia winding down and only small pockets of regional production remaining, Eastern supplies will be snug for the next few weeks. In the West, both Central Mexico and Baja are running light, with fair to good quality overall. Baja is projected to see a modest uptick in volume in October, weather permitting, which should offer some incremental relief but not a major surge in supply.

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MARKET UPDATES

GREEN BEANS

Green bean supplies are currently snug in the East. Harvests in both Michigan and Virginia have been interrupted by rain, reducing available volume and raising some potential quality concerns on affected lots. Relief is expected as Eastern North Carolina and Georgia are both slated to start in the next 7-10 days, which should help stabilize supply. In the West, beans are available out of Baja, Santa Maria, and Washington State. However, both Baja and Santa Maria are experiencing quality issues a few days after harvest, and the product is not traveling well as a result. Washington's green beans are showing good quality and adequate volume to cover most regional needs, while Santa Maria may see a slight uptick in volume this week, but overall supplies there will remain limited.

YELLOW AND ZUCCHINI SQUASH

Zucchini supplies in the East are mostly adequate this week, while yellow squash remains on the lighter side. Regional summer programs in Michigan, New York, and other northern areas are ending quickly as fall temps set in and crops reach the end of their cycle. To the south, Georgia is underway but still light on volume, and Eastern North Carolina along with a few other regional deals remain in production, though most are limited, especially on yellow squash. Quality is mixed, with some lots reflecting recent and prior weather pressure, but good product is available with careful selection. Volume is expected out of Georgia in the next 7-10 days, with Florida farms projected to start in October. In the West, Fresno and Santa Maria continue to offer light volume, primarily on zucchini, with very limited yellow squash available. Zucchini quality is running fair to good, while yellow squash is generally only fair and should be monitored closely on arrival. Sonora has just begun with light zucchini production; volume has been slow to start but should improve over the next 10 days as weather allows. Yellow squash out of Sonora is not expected for about two more weeks. Early Sonora zucchini quality has been fair to good so far.

CALABACITA

Calabacita squash volumes remain limited nationwide this week. In the West, Santa Maria's production continues to be very light, and Sonora is just starting with first picks at similarly low volumes. Quality in both areas is not particularly strong, which further reduces usable supply. We expect gradual volume increases out of Sonora as the season progresses. Eastern availability is confined to a few small pockets of production; quality there has been good overall, though sizing is running on the shorter side.

GREEN BELL PEPPERS

Eastern green bell pepper supplies are slightly lighter this week as regional and local programs move into the final stages of their seasons. Michigan continues to harvest but is contending with some quality concerns, while New Jersey, North Carolina, and Tennessee are also winding down with reduced volumes and variable quality. We expect the transition to southern production over the next 7-10 days as Georgia's fall crop gets underway. In the West, green bells are coming from Fresno and Washington State, with steady supply out of California and a new field just starting in Washington. These production areas should carry us until Coachella begins around October 15, followed by a more substantial boost in volume when Mexican production returns in a significant way later in November and December.

MINI SWEET PEPPERS

Mini sweet pepper supplies are in transition as Washington's season winds down, with crops expected to finish within the next 7-10 days. Supply is shifting to Central California, Baja, and Central Mexico, all currently have only light volumes available. Overall availability is expected to remain on the lighter side as these regions work to cover demand ahead of Mainland Mexico coming online in December. Plan for tighter supplies and limited promotional opportunities until new-season Mexican production ramps up.

INSIDE THE PARADIGM SHIFT: HOW SUSTAINABILITY IS RESHAPING FRESH PRODUCE ECONOMICS

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

SEPTEMBER 23, 2026

Sustainability has undergone a fundamental transformation in the fresh produce industry. Once viewed primarily as a consumer-facing marketing initiative or a premium-priced niche category, sustainable practices are now treated as essential mechanisms for operational survival for growers and retailers alike.

Each year The Packer brings you Sustainability Insights, a report that examines what's now and what's next in sustainable practices and perspectives among three distinct groups: growers, retailers and consumers. Sustainability Insights 2026 reveals a striking paradigm shift across the fresh produce landscape — neither grocers nor growers are betting on consumer price premiums to subsidize green initiatives. Instead, supply chain stakeholders from the farm to the retail aisle are pursuing sustainability to build resilience, mitigate volatile climate disruptions and protect razor-thin profit margins.

The Reliability Race: Grocers Restructure Sourcing Against Climate Volatility

Unpredictable regional weather is sending shockwaves through grocery supply networks. 69% of produce retailers report that volatile climate events have directly disrupted their primary supply regions —including 24% who cite major operational strain — making supply chain stability a top retail mandate. To safeguard inventory and reduce store shrink, grocers are actively restructuring procurement strategies. Diversifying supplier bases (66%) and entering new geographic regions (38%) have become standard protocols. Above all, local and regional sourcing has emerged as the clear breakout success story, with 85% of retailers reporting positive shopper feedback on local offerings.

Though 52% of retailers acknowledge that local sourcing increases localized operational costs, they willingly absorb these expenses because localized networks yield undeniable supply predictability and customer goodwill.

Growers Navigate Financial Strain

At the root of the fresh produce supply chain, growers are navigating an acute, multiyear financial strain.

An overwhelming 87% of growers report that their operating costs are rising faster than the prices they receive for their crops — with 45% strongly agreeing and 42% somewhat agreeing that they are trapped in a tightening margin squeeze. When evaluating operational pressures, growers point to a relentless triple threat of essential farm inputs, including labor, energy and fuel, and input costs. In response, growers are forced to rethink farm management, shifting away from speculative growth toward efficiency, input reduction and yield optimization simply to maintain baseline profitability.

Evolution of the Eco-Conscious Shopper

In the fresh produce aisle, consumer definitions of sustainability are also undergoing a profound evolution. Eco-conscious purchasing decisions have transcended basic environmental concern to become deeply tied to personal identity and lifestyle. This cultural shift has triggered a dramatic reprioritization of sustainable practices among shoppers. In 2023, packaging concerns dominated consumer mindshare, with 34.5% identifying biodegradable packaging as the single most critical sustainability practice. By 2026, priorities flipped: One-third (33%) of survey respondents now rate organic growing practices as the top sustainability attribute in produce, while packaging-related practices slipped to the bottom of rankings. Sustainability is no longer driven by ideology or marketing buzzwords but rather by pragmatic, cross-chain economics.



[READ MORE HERE](#)

IFPA PREVIEWS GLOBAL SHOW: TRUST, AI, FIRST MIDWEEK SCHEDULE

[THESHELBYREPORT.COM](https://theshelbyreport.com)

September 20, 2026



International Fresh Produce Association CEO Cathy Burns will open the 2026 Global Produce & Floral Show with her annual State of the Industry address Oct. 14 in Orlando, Florida, framing food safety, trade, labor, sustainability, AI and consumption as one interconnected global system, and kicking off the show's first run on a midweek schedule.

The preview arrives with unusual urgency. "There has rarely been a more important moment for our industry to come together than right now," Burns said in a media briefing ahead of the show, noting that this year's headwinds affect everyone and that "the world is going to look different by October."

The stakes are familiar to the produce community after a summer defined by the industry's largest foodborne illness outbreak and the consumer-confidence rebuilding now underway.

"Fresh products move at the speed of trust," Burns said. "When confidence is strong, markets function, buyers buy and consumers choose fresh. This keynote will explore what our industry must do together to build that confidence, anticipate what is coming next and turn disruption into durable opportunity."

A schedule built for business

The show runs Oct. 14-16, Wednesday through Friday, a change from its traditional weekend dates that Burns said came directly from member feedback, creating more room for business and a stronger final day. The event brings together more than 20,000 global decision-makers and more than 1,000 exhibitors, with the expo floor opening Thursday.

The State of the Industry, Wednesday from 8:45-10 a.m., anchors a general-session lineup that continues Thursday with board leadership. 2026 Chair Patrick Vizzone, founder and managing partner of AgroNovare, will reflect on the association's progress and innovation commitments, and 2027 Chair Elyse Lipman, CEO of Lipman Family Farms, will set the course for the coming year, speaking just before keynoter Justin Wren's "Fighting for What Matters" session. Friday's Women's Fresh Perspectives Breakfast features concert pianist and speaker Jade Simmons, timed to the International Year of the Woman Farmer.

Programming aimed at the headwinds

The education festival between Wednesday's general sessions tackles the same issues Burns will connect on stage: global trade and business conditions, the economics driving pricing and sourcing, food safety and traceability, packaging and sustainability, shopper trends and protecting brand reputation in an AI-driven world. A Wednesday afternoon session convenes IFPA leaders and thought leaders on advocacy, nutrition, trade and leadership during crisis.

In the press briefing, Lipman pointed to Thursday and Friday's Food Safety and Tech Exchange sessions, short, operator-led discussions on the business case for AI, practical FSMA 204 implementation, packaging compliance, digital twins and automation, along with a returning regenerative agriculture tour and a new supply-chain tour connecting operations leaders with cold chain technologies from predictive AI to robotics.

"We are navigating historic climate volatility, relentless cost and margin pressures, ever-evolving food safety challenges and complex regulatory mandates, from FSMA 204 in the U.S. to the EU's new packaging rules," said Lipman, citing an environment where social media can ignite trends or spread misinformation overnight. "None of us can solve these structural headwinds in a silo. We feed people fresh, nutritious food. We are all on the same team, and we have work to do."

[READ MORE HERE](#)

UPCOMING EVENTS:

OCTOBER 15 - 17

IFPA GLOBAL PRODUCE & FLORAL SHOW

ORANGE COUNTY CONVENTION CENTER

ORLANDO, FL

COME VISIT US AT BOOTH 1873!

<https://www.freshproduce.com/events/the-global-produce-and-floral-show/>

DECEMBER 2 - 4

NEW YORK PRODUCE SHOW

JACOB JAVITS CENTER

NEW YORK CITY

COME VISIT US AT BOOTH 307!

<https://nyproduceshow2026.smallworldlabs.com/home>



TOMATO SNAPSHOT

THE GLOBAL PRODUCE & FLORAL SHOW, PRESENTED BY INTERNATIONAL FRESH PRODUCE ASSOCIATION, IS A FEW WEEKS AWAY, AND OUR CALENDAR IN ORLANDO IS FILLING UP.

FIND US AT BOOTH 1873 FOR OUR NEW FIRE-ROASTED SALSA FOR FOODSERVICE, MADE WITH TOMATOES GROWN ON LIPMAN FARMS AND ROASTED AT OUR OWN FACILITY. IT IS THE SAME CONTROL OVER EVERY STEP WE ARE KNOWN FOR, CARRIED ONE MORE STEP INTO THE ROASTER. OUR SALES TEAM WILL BE THERE TO WALK THROUGH IT, ALONG WITH FALL PROGRAMS AND WHAT RELIABLE SUPPLY LOOKS LIKE INTO THE NEW YEAR.


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Good
FROM THE
GROUND UP.