

SEPTEMBER 4, 2026

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ON THE HORIZON

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Consistent*

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industry updates

CROP & MARKET

INDUSTRY INFO





MARKET UPDATES

ROUND TOMATOES

Eastern round tomato supplies remain limited but relatively stable this week. Tennessee and other local/regional deals are all running light. Virginia crops are set to begin early next week, which should provide some modest supply relief for the East. Yields on this upcoming Virginia crop are projected to be about average, with a slightly smaller size profile than their spring deal but still offering a good mix of sizes. Earlier heat could pressure yields on later-harvested blocks, so overall supplies are likely to stay on the tight side until Florida resumes production in late October to early November. In the West, Baja and Central Mexico are expected to hold fairly consistent through September, with volumes in the light-to-moderate range. In California, growers are transitioning from summer to fall acreage, but output has remained steady through the changeover. Despite recent heat, quality is holding solid and sizing is running moderate. California round tomato production is expected to continue into mid-October.

GRAPE TOMATOES

Eastern grape tomato supplies are tightening overall as many regional programs near the end of their seasons, but Lipman's Virginia farms are providing a steady anchor. Harvests there are running at moderate levels, and we expect consistent supply over the next two weeks as new fall plantings come into production and older blocks phase out. Yields have been below normal due to weather-related quality pressure, but the newer fields—having seen less adverse weather—should deliver better packouts. Virginia production is expected to continue into October before the program transitions back down to Florida for the winter. In the West, grape tomato supplies are light as both Central Mexico and Baja work through recent rain events. Quality and yields have been impacted more heavily in Central Mexico, limiting usable volume. Some new acreage is expected to break over the next 7–10 days, assuming no further weather disruptions. Baja should maintain relatively consistent production through most of September, and quality there is currently good.

ROMA TOMATOES

Roma tomato supplies remain light overall in the East. Tennessee is the primary production area, with consistent but insufficient volume to cover total Eastern demand. Improved weather has helped ease earlier quality concerns, and new fields coming online this week should further strengthen quality on incoming fruit. Small pockets of local production are supplementing Tennessee, but volumes are too limited to materially change the supply picture. With Florida's November crops as the next major volume source, we expect light supplies to persist in the intermediate term. In the West, California's harvests are running lighter as prior heat has taken a toll on yields, though sizing remains on the larger side and quality has improved over the past few weeks. In Mexico, both Baja and Central Mexico are in lighter supply as seasonal conditions curb production. Recent rains have affected both regions, with Central Mexico seeing the greater quality impact. With additional rain in the forecast for Central Mexico, we anticipate continued light availability and a constrained volume of market-ready fruit in at least the short term.

ORGANIC ROMA TOMATOES

Organic roma tomato supplies are in good shape this week, with steady production out of both Baja and Central Mexico. Quality has been solid overall, with sound fruit and good firmness. Some lots have been arriving with lighter color, but the tomatoes are ripening up well and achieving good color off the vine. Looking ahead, expect some price fluctuation in the coming weeks as the organic market responds to shifts in the conventional roma market.

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MARKET UPDATES

CHILI PEPPERS

Chili pepper supplies in the East are running at light to moderate levels this week, depending on the variety. Michigan, New Jersey, Ohio, and Pennsylvania have the heaviest volume, with additional pockets of local production in Kentucky, North Carolina, and New York. Jalapeño availability is a bit lighter than normal, and serranos remain the tightest of the Eastern offerings. Expect the seasonal transition from northern to southern growing regions to begin over the next few weeks. In the West, Central Mexico, Baja, and Washington state are the primary supply areas. Overall volumes are light on jalapeños, poblanos, and habaneros, with Central Mexico showing fair to good quality on most items and Baja generally offering good quality fruit. Washington is harvesting all key varieties and helping support the region with good-quality, fresh product.

MINI SWEET PEPPERS

Mini sweet pepper supplies remain snug this week, with lighter production continuing out of both Baja and Central Mexico. Washington state is helping to fill in regional needs with adequate volumes, which is providing some relief despite the overall tight market. After working through a recent production concern, quality has improved significantly, and current packs are looking very nice with good color and firmness. Even so, total availability is expected to remain limited in the short term.

CALABACITA

Calabacita supplies are very limited this week across both the East and West. In the West, most volume is coming from the Santa Maria area, where harvests have tapered off significantly and overall quality is fair. In the East, there are only a few scattered pockets of production, and volumes remain extremely light. With no major new regions set to come on immediately, expect calabacita availability to stay tight in the near term.

GREEN BELL PEPPERS

Green bell pepper supplies remain readily available in the East, though volumes have lightened slightly. Michigan, New Jersey, New York, and various scattered local deals are all in production. Quality has been mixed in some southern areas that have dealt with persistent rains, and New Jersey also experienced some recent quality concerns but has now moved into new fields where condition has improved. Over the next few weeks, look for northern programs to begin winding down as production migrates back to the South, with Georgia expected to start in late September to early October. In the West, availability is steady, with strong-quality fruit coming out of the Fresno, CA, and Washington state growing regions, where production has been consistent and sizing and color remain solid.

YELLOW AND ZUCCHINI SQUASH

Yellow and zucchini squash remain on the short side in the East as summer programs wind down and Michigan works through a slight production gap. Fall crops have just started in North Carolina, where zucchini volumes are stronger than yellow squash, and Georgia has begun with light volume but won't see significant production for another two weeks. Quality varies by grower and area due to recent unfavorable weather, though there is still nice-quality fruit available for those who can be selective. As additional fall plantings come online, availability should gradually improve. In the West, supplies are very limited. Santa Maria's production is expected to stay light through the remainder of the season (through September), and quality has been particularly challenging on yellow squash, with heavy scarring and scuffing. Meaningful improvement in both supply and quality is expected once Sonora starts new fall crops in mid-October.

HEALTH AND WELLNESS: THE LONG VIEW

[SUPERMARKETPERIMETER.COM](https://supermarketperimeter.com)

September 1, 2026



Health and wellness have shifted from a short-term, diet-driven mindset to a long-term, behavior-driven lifestyle. Consumers are no longer chasing quick fixes—they're building everyday habits around food that support overall wellbeing.

Developing alongside that has been a significant rise in food is medicine, where shoppers increasingly look to foods, especially fruits and vegetables, for benefits like gut health, immune support, and cognitive health. Nearly 6 in 10 consumers (57%) report being comfortable with tailoring their eating habits for maximum health, preferring dietary changes over modern medicine for chronic disease management.

The big-picture trend is a rising consumer focus on using diet as a primary tool for health and wellness. While consumer openness is high, there remains untapped potential for healthcare providers and the produce industry to further support and guide these choices. This shift is likely to continue driving demand for fresh produce and health-oriented food products in the coming years.

There's a huge opportunity for retailers, health professionals and the produce industry to come together to make a systems change approach in communities that "make the healthy choice the easy choice." The focus is very clear: Fruits and vegetables are foundational to health—not optional. Consumers don't want to choose between joy and health anymore — and frankly, they're not going to.

[READ MORE HERE](#)

GEN Z IS BOOSTING RESTAURANT TRAFFIC

[RESTAURANTDIVE.COM](https://www.restaurantdive.com)

AUGUST 28, 2026

Bars and independents are outperforming chains, and consumers are shifting from grocers to restaurants. Restaurant traffic grew 1.1% year over year in July, driven by greater spending among lower-income cohorts. Restaurant spending also rose 3.3% during the same time frame. These shifts are driven by a combination of easing menu inflation and wage growth, which has raised the spending power of younger consumers — particularly Gen Z — who are more exposed to labor market shifts than older diners. Gen Z has seen the fastest increase in restaurant spending of any generational cohort in recent months.

These positive shifts come despite considerable macroeconomic uncertainty. While some chains have seen falling traffic and other analyses of consumer health have been more pessimistic, this earnings season yielded some anecdotal evidence. Overall, 'lower earners' restaurant spending increased 4.1% YoY in July, the largest improvement over the past year compared to other income cohorts. Gen Z are the only generation to have increased spending across all restaurant types.

This generational divergence in spending is due to faster after-tax wage growth, which benefits younger consumers who are more exposed to labor market conditions. Baby boomers, who are often entering retirement, have seen the slowest spending growth in recent months. Consumers are shifting some of their grocery spending to restaurants relative to 2025. This comes despite increased emphasis by grocers on foodservice and ready-to-eat food programs. The report found that while menu prices are still rising faster than grocery prices, the rate of menu price increases has slowed in recent months.



[READ MORE HERE](#)

UPCOMING EVENTS:

SEPTEMBER 9 - 12

SEPC SOUTHERN INNOVATIONS

MUSIC CITY CENTER

NASHVILLE, TN

COME VISIT US AT BOOTH 614!

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

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/>



TOMATO SNAPSHOT

WE ARE HEADING TO NASHVILLE FOR SOUTHEAST PRODUCE COUNCIL'S SOUTHERN INNOVATIONS 2026 NEXT WEEK, AND LIPMAN FAMILY FARMS WILL BE ON THE FLOOR.

THE SHOW RUNS SEPTEMBER 9 THROUGH 12 AT THE MUSIC CITY CENTER, WHERE RETAIL TEAMS LINE UP PROGRAMS FOR THE SEASON AHEAD. IT

IS A GOOD MOMENT TO TALK TOMATOES, PEPPERS, AND WHAT STEADY SUPPLY LOOKS LIKE HEADING INTO FALL.

FIND US AT BOOTH 614 IF YOU ARE BUILDING YOUR FALL SET OR LOOKING FOR A GROWING PARTNER WITH STEADY SUPPLY THROUGH THE SEASON.



COME SEE WHAT IS
GROWING AT LIPMAN



DROP BY AND
SEE US AT

BOOTH #614