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CROP & MARKET

INDUSTRY INFO

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MARKET UPDATES

ROMA TOMATOES

Roma tomato supplies remain very tight in both the East and West. In the East, most growing regions have wrapped up production, leaving limited availability as the market transitions to Florida's fall crop. New harvests are expected to begin in late October, with improved volume anticipated in November, although initial yields may be lighter than normal. Out West, supplies are also limited as Central Mexico and Baja continue to deal with weather events. Central Mexico could see some volume increases in another 2-3 weeks, weather willing, while Baja's future production will be better assessed after the weekend's storm passes. California production is also nearing the end of its season, with limited but steady supplies and slightly smaller sizing expected over the next two weeks.

ROUND TOMATOES

Round tomato supplies remain extremely limited across all major production regions. California is nearing the end of its season, with additional growers finishing this week and incoming rain potentially accelerating the transition. In the East, Quincy remains the primary transitional supply region, but available volumes are extremely short. Florida production is beginning in a limited way, with meaningful volume still several weeks away. Baja and Central Mexico continue to experience weather-related production delays, while some growers have postponed harvest starts until November. Supply is expected to remain extremely tight, with continued upward market pressure and limited flexibility on sizing and quality.

GRAPE TOMATOES

Grape tomato supplies remain extremely tight nationwide, with demand continuing to exceed available production. Eastern supply remains minimal as regional programs finish and Florida's Ruskin/Palmetto production begins in very light volumes. Some improvement is possible next week, but meaningful recovery remains uncertain. Western availability is equally challenging, with Baja and Central Mexico experiencing significant weather-related production and quality issues. Some Baja fruit is showing 30–40% splits and shriveling, significantly reducing usable pack-outs and limiting suitability for extended transportation. Additional growing regions have delayed production starts until November. We anticipate continued severe supply constraints and elevated market pressure until new production becomes established.

CUCUMBERS

Eastern cucumber volumes have lightened up this week as North Carolina winds down, with fields expected to finish by week's end and Georgia becoming the primary source. Georgia is on the backside of its season with lighter harvests, but will get some support from early Florida acreage starting this week. In the West, supply is primarily coming from Baja and Sonora. Baja's volumes are light, and quality is fair to good following multiple weather events. Sonora is ramping up with more moderate volumes, though initial quality has been variable, with some light color and softness tied to prior wind and rain. With improved weather in the forecast, we expect both volume and overall quality to strengthen over the next 7 days.

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MARKET UPDATES

CALABACITA

Calabacita supplies are light but improving as Sonora ramps up with new-season volume. Quality out of Sonora has been fair to good overall, though there are some reports of discoloration tied to prior rain events. Fruit quality has been good, but sizing is running on the shorter side. Eastern availability remains characteristically light, with limited pockets of product coming out of North Carolina and Georgia. For now, expect a snug but workable market, with Sonora serving as the primary shipping region and the East providing only supplemental volume.

GREEN BEANS

Green bean supplies are extremely limited nationwide this week. In the East, with northern regions such as Virginia now finished, availability is very light and centered in Georgia, where prior weather has negatively impacted both quality and yields, keeping the market very snug. Some Florida acreage is expected to start in about two weeks, but volumes may remain on the lighter side as those fields were also affected by a recent tropical system. In the West, supply is equally short. A few remaining California fields have effectively finished after last week's rain, and while Baja still has some product, quality is poor following three separate hurricane rain events, making that fruit a challenge for retail programs. Expect continued tightness and plan conservatively until new, weather-clean acreage ramps up.

MINI CUCUMBERS

Mini cucumber supplies are still somewhat snug this week although Canada and Mexico both have some availability. Western Canada's harvests have become more consistent and should remain steady for the next few weeks. Mexico's supply is limited at this time, but we should begin seeing more crossings as we move into November.

COLORED BELL PEPPERS

Eastern Canada has moved past its last big flush of the season and is now entering a lighter production phase for the balance of harvest. In contrast, Western Canada continues to produce steady volumes with good quality and no sizing concerns, and is expected to run a bit longer—likely through November, weather permitting. At the same time, Central Mexico is providing consistent, reliable volume, helping to support overall supply as Eastern Canadian production tapers off.

CHILI PEPPERS

Chili pepper availability has improved somewhat in the East, with Georgia now underway and offering most varieties. Poblanos remain a bit snug, but volumes on other items are mostly adequate to cover current demand. Florida is expected to start in 2–3 weeks as the seasonal transition moves south. In the West, supplies are still centered in Baja and Central Mexico, where overall volume is light and poblanos, serranos, and husked tomatillos are especially limited. Western availability should begin to improve as Sonora comes online over the next two weeks and adds much-needed volume to the market.

MINI SWEET PEPPERS

Mini sweet pepper supplies are seasonally snug and expected to remain that way in the near term. Currently, product is coming from Central Mexico and Baja, both of which are working with light production with quality and sizing concerns. Looking ahead, supplies are likely to stay at these lighter levels until West Mexico ramps up and provides new-crop fruit.



HOW BEHAVIORAL SCIENCE CAN GET SHOPPERS TO BUY (AND EAT) MORE FRESH PRODUCE

THEPACKER.COM October 19, 2026

ORLANDO, Fla. - Despite decades of relentless “eat your veggies” campaigns, only 10% of Americans consume enough fruits and vegetables. It’s a gap that produce leaders say will only close when the industry trades health lectures for irresistible flavor, cultural rituals and frictionless convenience.

At the International Fresh Produce Association’s 2026 Global Produce and Floral Show, industry leaders and health advocates gathered for a breakout session titled, “From Appetites to Aisles: Proven Strategies for Making Produce the Star.”

they tackled one of the agriculture and retail sector’s most persistent paradoxes: why produce consumption remains flat despite widespread awareness of its health benefits.

The Reality of the Intention-Action Gap

While eating fruits and vegetables is widely recognized as the single most effective dietary change for personal and planetary health, only 1 in 10 Americans meets recommended daily intake targets. Globally, half the population lacks sufficient access, and consumption figures have stalled for decades despite continuous public health campaigns. To address this, the Foundation for Fresh Produce developed the “Power of Pull” framework — a model outlining 18 distinct drivers across individual, social and physical environments. The consensus among the panel was clear: Telling consumers that produce is “good for them” is no longer enough. Increasing consumption requires removing cognitive, cultural and physical friction at every point of decision-making.

Harnessing Food Culture and Reducing Cognitive Friction

The discussion emphasizes the role of cultural norms in shaping food choices, describing food culture as the “software” that can make produce an effortless preference. Cognitive friction — the mental effort required to plan, prep and cook — serves as a primary barrier to eating fresh food.



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WHAT SHOPPERS WILL PURCHASE NEXT IN PRODUCE AND FLORAL

THEPACKER.COM October 14, 2026

ORLANDO — Fresh produce and floral executives gathered at the International Fresh Produce Association's (IFPA) Global Fresh Produce & Floral Show expo in Orlando, Fla., Oct. 14, to examine how rising living costs, changing retail channels and shifting consumer preferences are redefining shopper buying habits across the supermarket landscape.

Key findings from consumer tracking data and register panel insights, outlining the market headwinds, shifting trust and generational spending habits defining the aisle.

Navigating Headwinds and Value Optimization

Elevated costs of living continue to pressure consumer wallets across retail. "Driven primarily by consumer packaged goods, since 2020, the average American household is paying 37% more for a food item than they did a few years ago,"However, that value isn't simply a matter of the lowest price per pound. In an "experiential economy," consumers are actively seeking quality, flavor and convenience, making value optimization personal.

Key market drivers shaping consumer choices include:

- **Speed at Dinner:** The average dinner prep time in the U.S. continues to shrink, with households needing meals on the table in under 15 minutes. Produce that offers minimal prep fits directly into this need.
- **Health and Wellness Shifts:** With approximately one-third of U.S. households having someone on or considering a GLP-1 medication, eating patterns are shifting toward smaller, snackable occasions rather than traditional diet plans.
- **Channel Diversification:** Traditional supermarket channels have seen a five-point market share loss in fresh produce since 2022. Retailers, alongside club stores, are capturing a larger share — particularly among younger shoppers.
- **E-Commerce Growth:** E-commerce now accounts for 10% of all U.S. produce sales, driven by pickup and delivery services.



READ MORE HERE

UPCOMING EVENTS:

DECEMBER 2 - 4
NEW YORK PRODUCE SHOW
JACOB JAVITS CENTER
NEW YORK CITY
COME VISIT US AT BOOTH 307!
https://nyproduceshow2026.smallworldlabs.com/home

JANUARY 28 - 30
EAST COAST PRODUCE EXPO
FONTAINEBLEAU MIAMI BEACH
MIAMI BEACH, FLORIDA
https://www.eastcoastproduceexpo.com/



TOMATO SNAPSHOT

THAT'S A WRAP ON THE 2026 @INTLFRESHPRODUCEASSN GLOBAL PRODUCE & FLORAL SHOW! 🍅

THIS YEAR, WE BROUGHT SOMETHING NEW TO THE TABLE: LIPMAN'S FRESH-COOKED SALSA, MAKING ITS DEBUT AT IFPA. IT WAS EXCITING TO INTRODUCE THIS NEW OFFERING TO THE INDUSTRY AND SHARE A TASTE OF WHAT'S NEXT FOR LIPMAN.

THE SHOW WAS ALSO A MILESTONE FOR OUR TEAM AS ELYSE LIPMAN STEPPED INTO HER ROLE AS IFPA CHAIR FOR 2027. WE'RE PROUD TO SEE HER TAKE ON THIS LEADERSHIP ROLE AND REPRESENT THE GROWERS AND FAMILIES WHO MAKE THIS INDUSTRY WHAT IT IS.

THANKS TO EVERYONE WHO STOPPED BY TO CONNECT WITH US IN ORLANDO. WE'RE HEADING HOME PROUD OF WHAT WE SHARED AND EXCITED FOR WHAT'S AHEAD.

