

APRIL 18, 2025

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ON THE H O R I Z O N

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industry updates

**CROP &
MARKET**
INDUSTRY INFO





MARKET UPDATES

ROMA TOMATOES

Florida's roma tomato production has continued at a fairly steady rate despite production transitions for most growers. Lipman is harvesting in Estero where quality has been very nice on both crown and 2nd picks. Sizing had been heavily skewed toward the larger end of the spectrum but is starting to come down now with more jumbo and XL fruit than XX sizing. Expect to see light volumes of romas out of the Ruskin/Palmetto area in the next week with gradual increases until all growers are going in the area in early May. Crops are also in transition across Mexico. Production from the Culiacán area is beginning to decline in both volume and sizing due to seasonal fade. New acreage in Hermosillo and Obregón has started, but volumes have been slow to ramp up so far. Central Mexico is currently producing at light levels, though new fields are expected to come online over the next few weeks, with volume gradually building into May. Baja also has some light availability, with increased production anticipated as additional areas begin harvesting later this month or in early May.

GRAPE TOMATOES

After a recent flush, some Florida growers are experiencing slightly lighter grape tomato volumes this week, but overall production is expected to be steady and consistent moving forward. While Lipman continues to harvest in Estero, we—along with other growers—have begun harvesting in the Ruskin/Palmetto area. Fruit from the new plantings is running a bit larger, but sizing is expected to settle into more preferred specs over the next week or so. In the West, grape tomato volumes out of the Culiacán area have remained consistent with no major concerns. Culiacán is expected to wind down by mid-to-late May. Looking ahead, both Baja and Central Mexico anticipate new crops coming online over the next few weeks to help support continued supply.

ROUND TOMATOES

Florida has experienced strong round tomato production over the past week. Sizing has been mostly on the larger side, though it began to trend slightly smaller toward the end of the week. Most growers are now getting underway in the Palmetto/Ruskin area with light volumes, while Lipman continues steady harvests at the Estero farm for a few more weeks. We will move into our acreage in the R/P area around May 1st. Overall, quality has been solid and consistent across the state. Looking to the West, round tomato volume out of Mexico is slightly lower this week. Culiacán is expected to remain mostly consistent through the end of April, with volume and sizing expected to decline into May as the season wraps up. Central Mexico will begin harvesting new acreage later this month, and Baja is set to start in the first full week of May.

TOMATO ON THE VINE (TOV's)

Mexico's TOV volumes and quality are on the decline as their season winds down. Fortunately, Canada has come online with new crops, offering adequate supply to meet current demand. Quality and sizing on the Canadian fruit have been very nice, providing a solid option for retail and program needs.

ORGANIC ROMA TOMATOES

The Sinaloa region continues to ship organic roma tomatoes in light to moderate volumes, but quality has been a challenge. Common issues include softness, abnormal color, and reduced shelf life. Fortunately, a new crop out of Sonora has now started and should help supplement supply with stronger quality fruit in the weeks ahead.

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ENGLISH CUCUMBERS

While there is still some light production coming out of Mexico, Eastern and Western Canada are now firmly in the driver's seat for English cucumbers. Production from both regions has been relatively strong and steady, with good overall quality and sizing. Barring any unforeseen weather disruptions, we expect this trend to continue in the immediate future.

MINI SWEET PEPPERS

Mini sweet pepper volumes are beginning to decline in West Mexico as the season winds down. Sizing is trending smaller, and some fruit is showing a green cast as growers work to keep up with demand. The transition to Baja is expected in late June or early July, leaving a potential supply gap in the meantime. Until then, volume will remain light out of West Mexico, with limited support expected from Canada and possibly some early California fruit.

GREEN BELL PEPPERS

Florida's bell pepper volumes are on the lighter side this week, with XL sizing particularly limited. As the crops mature, we're seeing a decline in quality, with a higher percentage of off-grade fruit coming out of harvests. We don't anticipate much improvement until fresh-crop fruit from Plant City begins hitting the market next week. With Georgia still 4-5 weeks away from starting, Florida will need to carry the bulk of supply in the East for as long as possible. Similar to South Florida, Mainland Mexico's bell pepper production is entering its seasonal decline. Sizing is trending smaller, though overall quality remains acceptable. While Mexico will continue to have fruit for the next few weeks, the California desert is expected to begin harvests in the next 5-7 days. This transition should bring improved sizing and stronger quality, helping support Western supply needs moving forward.

CUCUMBERS

Cucumber supplies have tightened in South Florida as weather-related quality issues—primarily scarring—begin to affect the remaining crops. Production is expected to wrap up in the next two weeks. With Georgia projected to start in about three weeks, there may be a short period of limited availability in the East. In Mexico, supplies remain mostly steady from multiple growing regions. Quality continues to be good overall, with the nicest fruit currently coming out of Baja.

GREEN BEANS

Green bean supply is extremely tight in both the East and West this week. In Florida, growers are facing lighter harvests, and some have had to walk away from fields due to disease pressure and quality issues. Eastern supply should improve when North Florida and Georgia begin harvesting in early to mid-May. In Mexico, volume remains very light due to adverse weather and ongoing water concerns. Production is expected to remain limited for the remainder of the season, which is just a few weeks from wrapping up. Once that happens, we anticipate domestic production in California to begin and help stabilize availability.

CHILI PEPPERS

As South Florida's chili pepper crops begin to wind down, decent volumes of jalapeños remain available, though supplies of poblanos, cubanelles, and serranos are more limited. Quality continues to be solid on jalapeños but can be hit or miss on the other varieties. Plant City is expected to start in the next 7-10 days, which should help improve both quality and volume in the near term. In Mexico, multiple regions remain in production, though overall supply is a bit lighter than usual this week. As in the East, jalapeños are the most readily available, while other chili varieties are present in smaller volumes. Tomatillos continue to present quality challenges.

EYELLOW & ZUCCHINI SQUASH

Plant City kicked off the squash season with strong early production, though supply has lightened a bit this week. We expect volumes to rebound shortly as farms move into new fields over the next few days. Georgia is also expected to begin harvesting in the next 7-10 days. Overall quality has been good, with only occasional reports of light scarring. In the West, Sonora is providing adequate supply, and this region should remain active through late May. After that, attention will shift to California and other domestic programs for availability.

WATERMELON

Melon production in the Immokalee area of Florida is running consistently, with both quality and yields tracking above average. Barring any major weather disruptions, production is expected to continue through the remainder of April. Harvests will then begin transitioning north to Central Florida in May, ensuring continued availability as the season progresses.



HOW COMPANIES ARE CONNECTING WITH THE ORGANIC CONSUMER

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

April 17, 2025

With younger shoppers driving sales growth for the category, produce businesses have multiple ways to stand out at retail.

THE ORGANIC CONSUMER

While all generations buy organic produce, sales are especially strong among younger, health-conscious and well-educated shoppers, with millennials and Gen Z leading the trend. Hispanic shoppers also represent a growing segment, and families with young children often prioritize organic for health reasons. People are mostly interested in buying organics because they consider it healthier but there is also a connection to sustainability. There is an emphasis on freshness, flavor, and nutrition. Consumers consider organics to be premium. It's important to understand organic shoppers and their motivations and anchor everything around that. Retailers can provide more in-depth product information or offer recipes to engage with them.

AT THE STORE LEVEL

Activity in the produce item is a good thing that draws consumers in. Customers want to see visually diverse displays, interesting pairings, and an occasional sample. Getting customers to try new things can create significant incremental sales. A dynamic and colorful display really highlights these products.

PRICING CONSIDERATIONS

The cost of organic produce tends to determine whether people will buy it, especially when comparing the price to conventional counterparts. However, those die-hard organic buyers tend to not necessarily look at the price.

Occasional organic buyers only buy when organic is appealing due to better quality and comparable price. The cost of organics has significantly decreased as more growers enter the market, with the gap between organic and conventional continuing to narrow every year.



[READ MORE HERE](#)

MARCH 2025 E-GROCERY SALES JUMP 21% TO \$9.7B

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

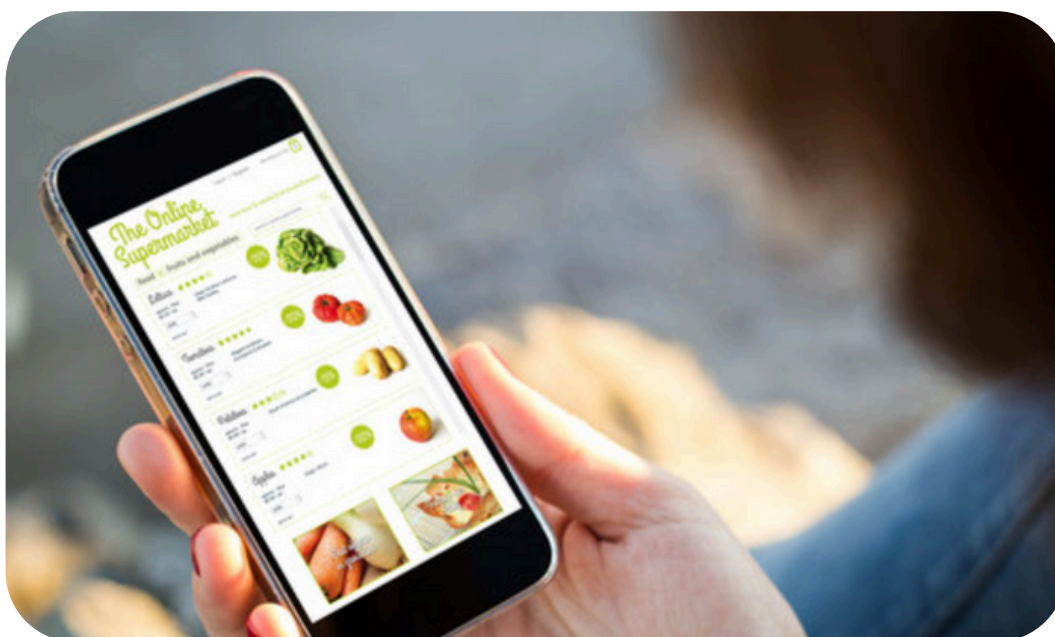
APRIL 15, 2025

The U.S. online grocery segment sustained its turbo-charged growth in March, ending up 21% versus a year ago with \$9.7 billion in monthly sales. Delivery continued to be the main driver of the topline increase, as it surged more than 30% year over year, due to expansion of its monthly-active-user base.

The latest monthly performance gains for e-grocery sales reflect the ongoing impact of aggressive promotions and deep discounts on annual memberships and/or subscriptions that began around May 2024. These promotions have been offered by a broad range of grocery retailers, across mass, supermarkets and third-party providers, and predominantly benefit delivery although pickup gets a boost that's largely confined to supermarket services.

March also marked five years since the COVID-19 pandemic was declared, which produced a rapid and profound impact on how U.S. households purchased their groceries. In August 2019, e-grocery rang up \$2 billion in monthly sales in the U.S. Then, seven months later in March 2020, e-grocery sales skyrocketed to \$6.5 billion, a more than 200% increase, the release said. This initial surge accounted for about 60% of the total gains for e-grocery since the pandemic. After peaking in early 2021, total e-grocery sales rebalanced through mid-2024, contributing another 20% of overall gains. More recently, there has been another 20% in gains driven by the uptick in subscriptions and memberships promotions, with March representing the eighth consecutive month of sales of over \$9.5 billion.

Customer expectations around online grocery have only increased since COVID-19 pushed many to give it a try. Retailers that elevate the experience with relevant offers and meaningful rewards won't just meet shoppers' evolving needs — they'll build stronger connections that fuel long-term growth.



[READ MORE HERE](#)

UPCOMING EVENTS:

MAY 28-30

WEST COAST PRODUCE EXPO

JW MARRIOTT DESERT SPRINGS RESORT
PALM SPRINGS, CALIFORNIA

<https://events.farmjournal.com/west-coast-produce-expo-2025/6970017>

JULY 9-10

ORGANIC PRODUCE SUMMIT

MONTEREY CONFERENCE CENTER
MONTEREY, CALIFORNIA

<https://www.organicproducesummit.com/en/home.html>

TOMATO SNAPSHOT

Greenhouse 101 🌱

So, what is a greenhouse anyway?

It's a climate-controlled growing environment that allows us to grow fresh produce with precision, no matter the weather outside. Inside, we manage temperature, humidity, and airflow to create the ideal conditions for healthy plants and consistent flavor.

The sun's energy powers it all, helping us grow vibrant, nutritious produce that ends up right on your table.

