

Crop Update

March 25, 2026

Florida Freeze Fallout Meets Mexican Heat

The market remains under pressure as Florida continues to recover from freeze damage and Mexico struggles with extreme heat. The combination is limiting supply, impacting quality, and keeping both pepper and tomato markets elevated as March winds down.

Bell peppers remain one of the most challenged categories.

Mexico, the primary supplier, is dealing with excessive heat that is slowing production and limiting harvestable yields. Shortened harvest windows are reducing overall output, while quality is mixed with increased insect pressure and fewer premium packs available. Larger sizes and No. 1 grade product are especially tight, pushing more volume into choice-grade supplies.

Florida is contributing very little volume following winter freeze damage. Many March fields were lost or set back, and what remains requires heavy grading. Supplies are inconsistent, with growers focused on managing through reduced yields until new fields begin in April.

Red bell peppers are even tighter, and recent harvesting decisions are compounding the issue. Over the past several weeks, growers have been pulling red fields early while fruit is still green to help cover green bell demand. That shift is now catching up to the market. True red volume is limited, and quality is being impacted, with increased reports of “chocolating” and inconsistent color development. Florida offers little relief, with extremely light, day-to-day volume and variable quality.



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Relief is coming, but slowly. Sonora is expected to start in late March with fewer acres planted, while the California desert may begin slightly earlier than normal due to warm weather. Georgia remains several weeks out, expected in late May. Until then, expect elevated pricing and continued tightness across the pepper category. Tomatoes are following a similar pattern, with supply disruptions stacking across regions.

Mexican production slowed following the mid-March national holiday and is now further constrained by extreme heat in Sonora and Sinaloa. Harvest crews are starting earlier in the day, but shortened picking windows are limiting overall output. Quality remains mixed, with some growers pulling from older or previously abandoned fields.

Florida continues to feel the impact of recent freezes, winds, and frost damage. Volume is extremely limited across rounds, romas, and grape and cherry tomatoes, and additional grading is required to meet specifications.

Rounds are seeing the most pressure on larger sizes, particularly 4x4 and 4x5. Romas have slightly better availability on medium sizes but remain tight overall. Grape and cherry tomatoes are also tightening as both domestic and Mexican supplies are constrained at the same time.

Expect tomato markets to remain firm with upward pricing pressure and continued volatility through mid- to late April, as new regions gradually come online.

Overall, the market is working through a difficult transition window. Florida is slow to recover, Mexico is weather-constrained, and supply gaps are showing up across multiple commodities. We're expecting continued tight availability, elevated pricing, and variability in quality and packouts.

