



VINYARD

The Weekly Vine – Produce Market Update October 10-17, 2025

Overview & Key Themes

- Numerous crops are in transition between old and new seasons, causing shifts in size curves, pricing, and packout consistency.
- Recent weather events across Central America, Mexico, and the U.S. West Coast continue to influence harvest timing, quality, and shelf-life, particularly for tropicals and leafy greens.
- School lunch programs and institutional foodservice demand are keeping pressure on select commodities, while others are seeing slight price relief as new volume enters..

Fruit & Citrus

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Apples	New crop in full swing; strong volume across varieties.	Honeycrisp remains dominant with large sizing; Galas and Fujis showing excellent consistency.
Avocados	California nearly done; Mexican imports increasing. Market steady.	48ct/60ct sizes leading. Excellent internal quality; #2s still limited.
Bananas	Stable on both pricing and availability.	Consistent color and ripening.
Grapefruit	Marsh Ruby harvest strong in California.	Good internal color, high juice content, peaking on mid-sizes.
Limes	New crop from Mexico; sizing remains mixed. Market firm.	Smaller fruit (230s/250s) prevalent. Oil spotting and thin skin affecting shelf-life.
Oranges	Late Valencias wrapping up; Navels beginning harvest soon.	Large sizes tight due to school demand. Some regreening, but high sugars.
Cantaloupe	Domestic season at peak; larger sizes dominate.	High brix levels; shell quality strong. Market firming with rising demand.
Honeydew	Sizing improving; imports from Mexico ramping up.	Still seeing some smalls, but 6s and 8s becoming more common. Quality good overall.

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Watermelon	Local melons finished. Final week of U.S. crops; transitioning to Mexico.	Watch for transitional inconsistencies, but quality remains fair to good.
Pineapple	Supply limited due to weather in Costa Rica. Prices high.	Quality variable; crownless product in high demand, especially for processors.

Vegetables, Herbs, Greens & Others

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality & Issues</u>
Asparagus	Stable from Peru & Mexico. Market flat.	Tip quality improving; good sizing on recent arrivals.
Bell Peppers	Strong supplies across all colors.	Some heat stress and color variability. Mostly solid quality.
Jalapeño & Poblano Peppers	Tighter supply; market firmer.	Irregular sizing and color; some softness reported.
Broccoli	Market elevated.	Quality mixed due to earlier pest issues.
Cauliflower	Market remains elevated.	Insect pressure and weather variability affecting uniformity.
Brussels Sprouts	Light volume; firm / high pricing persists.	Ongoing insect pressure; sizing remains a challenge.
Carrots	Strong supply across major growing areas.	Ideal sizing and good shelf-life; stable demand.
Celery	Market steady to firm	Heat-related cosmetic issues and occasional insect damage.
Spinach/Tender Leaf/Cilantro	Slightly tighter on baby spinach; others steady.	Tip burn and leaf fringe possible
Lettuce (Boston, Romaine, Iceberg)	Availability delays possible, pricing elevated. Quality marginal. Next few weeks could be VERY challenging.	All types showing some outer leaf issues due to late heat; quality variable.
Tomatoes (All Types)	Volume strong both East and West.	Grape and Roma performing well; occasional issues in rounds.

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Green Onions	Slight week-over-week improvement in supply.	Some bruising in larger sizes; otherwise solid quality.
Mushrooms	Market steady; retail/foodservice demand balanced.	No significant supply gaps; quality consistent.
Tomatillos	Short supply; prices remain elevated.	Spotty quality; more off-color and soft fruit being reported.
Onions	Strong volume available	Idaho harvest may see delays due to recent rain.
Potatoes	New crop Russets solid; sweets entering slowly.	Some early stress in sweet potatoes; otherwise good quality on bulk Russets.
Squash (Yellow & Zucchini)	East Coast winding down; Mexico filling in.	Weather blemishes on some lots; overall good supply and quality.

Berries

- Strawberries – California volumes up & down. Some quality issues due to heat. Shelf-life may be shorter. Mexican fruit gaining momentum, especially for holiday programs.
- Raspberries – Stable availability; high demand from retail and school programs keeping market firm.
- Blueberries – Transitioning to imports; Peru dominating shipments. Consistent quality, though size is variable. Prices elevated.
- Blackberries – Ample availability with strong quality reports. Few issues noted across growing regions.

Outlook (Next Few Weeks)

- Salinas Valley is nearing seasonal end — disease pressure and labor issues could hamper late harvest quality, especially in leafy greens and broccoli.
- Citrus sizing remains a challenge; large Navels and small limes both in tight supply. Expect better balance by late October.
- Storm activity in Costa Rica and the Pacific Northwest may reduce pineapple and onion supply further into late October.
- Cooler temperatures are likely to boost demand for Brussels sprouts, potatoes, and hard squash.
- Holiday buying is starting to influence wholesale movement — watch for upticks in cranberries, sweet potatoes, celery, and greens.