



VINYARD

The Weekly Vine – Produce Market Update

October 31 – November 6, 2025

Overview & Key Themes

- Multiple crops are transitioning between regions — particularly from California to desert districts and from domestic to import programs — creating **short-term supply gaps and fluctuating sizes**.
- **Unseasonably warm temperatures and intermittent tropical moisture** across Mexico, Central America, and the western U.S. continue to **impact field yields and shorten shelf-life**, especially in tender greens, berries, and tropical fruit.
- **Pre-holiday demand** is building rapidly, with increased retail movement for core commodities, citrus, and cooking vegetables.

Fruit & Citrus

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Apples	Excellent overall; new crop volumes strong. Demand steady to strong on Honeycrisp, Fuji, and Gala.	Larger fruit dominates; smaller sizes remain limited and command premiums. Exceptional flavor and firmness.
Avocados	Mexico firmly in control; prices inching up with strong demand.	Good internal quality; 48ct–60ct plentiful. Smaller fruit is tight. Scattered delays from wet weather.
Bananas	Market stable; imports consistent from Ecuador and Costa Rica.	Ripening even; shelf-life solid despite humidity in ports.
Grapefruit	California Marsh Ruby steady; early Texas fruit expanding.	Excellent internal color and sweetness; primarily 40s and 48s.
Limes	Pricing stable; sizing continues small due to rain impact.	Predominantly 230s–250s; occasional rind softness and oil spotting.
Oranges	Valencia season nearly finished; Navel crop starting.	Navels trending small but high in sugars; Valencias show minor regreening.
Cantaloupe	Domestic crop is virtually finished; Mexico's crop increasing in volume. Market firm to higher.	High sugar levels, clean internal quality; light volume during transition.
Honeydew	Mexico increasing output; prices slightly elevated.	Interior quality solid; some external scarring. Sizes 6s–8s most common.

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Watermelon	Mexico fully transitioned; market higher.	Flavor strong, though exterior quality variable. Some hollow heart noted.
Pineapple	Supplies tight from Costa Rica due to heavy rainfall.	Good internal sugars but more external blemishes and crown rot . Market remains strong.

Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus	Peru steady; Mexico light. Prices remain higher.	Strong tips and sizing; color good.
Bell Peppers	West - steady production; East production is slowing.	Good color overall; some heat-related scarring .
Jalapeño & Poblano	Short supply; elevated prices.	Mixed color and softness; careful grading needed.
Broccoli	Market firm; Prices elevated.	Minor yellowing and pest scarring persist.
Cauliflower	Supply very limited; prices high.	Heat stress causing irregular sizing and heads.
Brussels Sprouts	Light harvest; strong demand. Prices high.	Insect pressure and sizing variation continues
Carrots	Ample volume; stable market.	Excellent quality and firmness; good for storage.
Celery	Active market; moderate availability.	Some fringe burn and heat marks.
Spinach/Tender Leaf/Cilantro	Baby spinach very tight; cilantro steady.	Wind and sun stress causing leaf burn and discoloration.
Lettuce (All types)	Supplies extremely tight; prices elevated.	Ongoing issues with mildew, tip burn, and fringe.
Tomatoes (All types)	Strong volume both coasts; prices steady.	Excellent color and flavor; occasional softness in older rounds.
Green Onions	Slight improvement in supply.	Tip burn still noted on larger sizes.
Mushrooms	Market balanced; steady.	Excellent quality across varieties.
Tomatillos	Market extremely tight.	Color variability and softness; careful handling essential.
Onions	Good storage crop; NW weather slowing late harvest.	Internally sound; some external staining.
Potatoes	Russets steady; sweet potatoes building.	Good overall quality; slight scurf in sweets.

Item	Supply / Market Direction	Quality & Issues
Squash (Yellow/Zucchini)	Mexico steady.	Strong color and sizing; occasional scarring from wind.

Berries

- **Strawberries** – Central California crop nearly finished; intermittent rain has created small harvest gaps, delaying trucks. Fruit softer with occasional bruising. Mexico's early fruit improving in firmness and color.
- **Raspberries** – Supply remains light; prices high. Quality fair with some pressure bruising.
- **Blueberries** – Imports (Peru, Argentina) dominate. Market elevated with smaller fruit in some lots. Flavor good.
- **Blackberries** – Excellent quality and steady supplies from Mexico and U.S. regions; consistent sizing and flavor.

Outlook (Next Few Weeks)

- Salinas-area greens will continue to decline in yield and quality until desert transition completes mid-November.
- Yuma and Imperial Valley crops will bring gradual relief, but expect short-term supply gaps.
- Early Navel oranges will remain small until mid-November; large sizes limited.
- Pineapple and onion supplies may tighten if wet weather persists in Central America and the Pacific Northwest.
- Thanksgiving demand building — expect strong movement and upward pricing pressure on celery, green beans, herbs, sweet potatoes, and cranberries.
- Hard squash, potatoes, and root crops will remain in strong seasonal demand as cooler weather sets in.