



VINYARD

The Weekly Vine – Produce Market Update

November 7 thru 14, 2025

Overview & Key Themes

- Seasonal transitions are in full swing as many commodities shift from **California coastal regions to desert and Mexican growing areas**, and from **domestic to import programs** in Central and South America.
- **Inconsistent weather patterns**—including unseasonably warm temperatures in the desert Southwest and intermittent tropical rains in Mexico and Central America—are impacting field conditions and **causing variable sizing and shorter shelf-life** in tender items.
- **Thanksgiving pull** is well underway, with heavy retail and foodservice demand focused on **celery, green beans, potatoes, onions, and holiday herbs**, while **citrus and root vegetables** see steady momentum.
- Cross-border delays continue to influence short-term availability on Mexican vegetables and tropical fruit.

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples	Excellent; new-crop fruit from WA and MI in full swing. Demand strongest on Honeycrisp, Fuji, and Gala.	Large sizes dominate; smaller fruit commands premiums. Outstanding crunch and flavor.
Avocados	Mexico remains primary source; market trending slightly higher due to strong holiday demand.	Good internal oil content; 48ct–60ct most available. Rain may cause occasional harvest interruptions.
Bananas	Supply consistent from Ecuador and Costa Rica. Pricing steady.	Ripening uniform; minor cosmetic issues from humid ports but overall quality good.
Grapefruit	Texas and California Marsh Ruby supplies strong.	Excellent color and internal sugars; mostly 40s–48s.
Limes	Supply tight; smaller fruit dominates due to excess rainfall.	Predominantly 230s–250s with occasional rind oil spotting. Market firm.
Oranges	Early California Navels increasing; Valencia season finished.	Navels trending small (88s–113s), high sugars and excellent taste; sizing expected to improve later in November.
Cantaloupe	Transition complete to Mexico crops; market firm.	High sugar levels; very clean interiors. Volume remains moderate.
Honeydew	Mexican production steady; slight price uptick.	Good sugars and flesh quality; minor wind scarring. Sizes 6s–8s.

Item	Current Supply & Pricing	Quality & Notes
Watermelon	Mexican regions producing well; market steady to higher.	Flavor strong; variable external appearance, occasional hollow heart.
Pineapple	Tight supplies from Costa Rica after extended rainfall.	Excellent flavor but increased external scarring and crown rot risk; prices remain strong.

Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus	Peru crops steady; Mexico crops improving slowly. Market elevated.	Good spear strength and sizing; occasional seeding.
Bell Peppers	West steady; Eastern supply tapering.	Excellent color; light wind scarring.
Jalapeño & Poblano	Short supply; firm to higher markets.	Mixed sizing and softness; fair color.
Broccoli	Supplies very limited; market elevated.	Yellowing and hollow stem common.
Cauliflower	Market extremely tight and prices high.	Heat stress and inconsistent sizing continue.
Brussels Sprouts	Demand strong; supply moderate, prices remain elevated.	Sizing variation; Insect damage and black spots present.
Carrots	Abundant supplies from CA and TX.	Excellent internal color and firmness.
Celery	Demand very strong; supply tightening.	Fringe burn and leaf curl from heat; prices rising ahead of holidays.
Spinach/Tender Leaf/Cilantro	Baby spinach tight; cilantro adequate.	Wind damage and heat stress causing leaf burn and discoloration.
Lettuce (All types)	Desert crop transition still ramping up; limited availability.	Tip burn, mildew, and fringe common; prices remain very high.
Tomatoes (All types)	Steady volume from both coasts and Mexico.	Excellent color and flavor; some soft fruit in older rounds.
Green Onions	Supplies improving slightly.	Tip burn persists; sizing variable.
Mushrooms	Market steady.	Consistent quality across varieties.
Tomatillos	Remain extremely tight; limited availability.	Variable color and softness; handle carefully.
Onions	Good storage crop; weather slowing late harvest in NW.	Clean internal quality; some external staining.
Potatoes	Russets steady; sweet potatoes in peak demand.	Excellent internal quality; minor scurf on sweets.
Squash (Yellow/Zucchini)	Mexico producing steadily.	Strong color, occasional scarring from wind.



Berries

- **Strawberries** – California nearly finished; desert and Mexican volumes increasing slowly. Quality fair with smaller fruit and occasional softness due to warm nights.
- **Raspberries** – Short supply; market firm to very high. Mexican fruit improving but limited.
- **Blueberries** – Imports from Peru, Argentina, and Chile increasing. Market easing slightly. Flavor good; sizing mixed.
- **Blackberries** – Excellent quality from Mexico; consistent supply and color.



Outlook (Next Few Weeks)

- **Lettuce and leafy greens** will remain tight until desert volumes reach full stride around mid- to late-November.
- **Celery, herbs, and green beans** expected to see continued upward pressure as Thanksgiving approaches.
- **Citrus** sizing should gradually improve by late November; sugars remain strong.
- **Pineapple and limes** may face intermittent shortages if Central American rainfall continues.
- **Root vegetables and potatoes** in peak condition for storage and seasonal promotions.
- Expect **freight costs** to edge up slightly through the holiday period as demand for trucks increases.