



VINYARD

The Weekly Vine – Produce Market Update

November 21 - 27, 2025

Overview & Key Themes

- **Desert regions (Yuma/Imperial) continue ramping up**, but persistent early-season gaps and uneven temperatures are still holding back full leafy green recovery.
- **Mexico's fall vegetable and tropical programs are expanding**, though fluctuations between cool nights and humid daytime conditions are causing **mixed sizing and variable external quality** in tender items.
- **Import programs from Peru, Chile, Ecuador, and Central America are all increasing** to support late-fall retail ads—especially for berries, grapes, and off-shore melons.
- **Thanksgiving pull at peak intensity**: strong demand on celery, green beans, Brussels sprouts, herbs, cranberries, and sweet potatoes continues.
- **Transportation delays remain a factor**: intermittent slowdowns at Texas border crossings and periodic congestion at West Coast ports are **disrupting Mexican veg and tropical fruit flows**.

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples	Excellent volume from WA/MI; pricing steady	Large fruit trend persists; exceptional crunch and acid-sugar balance on Honeycrisp and SweeTango types.
Avocados	Mexico steady but firming due to holiday demand	Good dry matter; 48–60ct remain most promotable, with light skin rub from recent showers.
Bananas	Strong, uninterrupted flow from Costa Rica & Ecuador.	Even ripening; occasional superficial peel freckles from humid transit lanes.
Grapefruit	California and Texas supplies well-balanced; markets stable.	Excellent blush and internal sugars; sizing centered on 40–48s.
Limes	Markets tight & prices elevated as rainfall limits sizing.	Mostly 230–250s; thin rinds and oil spotting require gentle handling.
Oranges	CA Navels gaining volume but fruit still small; pricing steady.	High sugars; 88–113s prevalent, with larger 72s improving late month.
Cantaloupe	Mexico producing steadily; demand outpacing supply slightly.	Very high Brix; clean interiors with moderate rind scarring.
Honeydew	Steady Mexican production; firm but stable markets.	Dense flesh, good flavor; minor cosmetic marking.

Item	Current Supply & Pricing	Quality & Notes
Watermelon	Moderate Mexican supply; strong holiday-adjacent demand.	Sweet flavor; sporadic hollow heart and external blemishes on larger fruit.
Pineapple	Very tight supplies from Costa Rica due to lingering storm effects.	High sugars and aromatics; increased crown rot and surface scarring.

Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus	Peru steady; Mexico recovering gradually; markets remain high.	Strong spears; occasional seeding and light knuckling.
Bell Peppers	West steady; Eastern regions mostly wrapped up.	Bright color; isolated sun-kissed shoulders.
Jalapeño & Poblano	Continued short supply; markets firm to higher.	Mixed sizes; pale shoulders and soft tips from variable temps.
Broccoli	Very limited; pricing remains elevated.	Quality issues remain - Hollow stem, brown bead, inconsistent crown formation.
Cauliflower	Extremely tight; high markets persist.	Undersizing and leaf intrusion due to transition stress.
Brussels Sprouts	Strong holiday pull; supplies limited.	Insect pressure & some black spotting and size variation.
Carrots	Ample supply; stable, promotable markets.	Excellent color and firmness.
Celery	Heavy Thanksgiving demand tightening markets further.	Moderate fringe burn; good overall pack-out.
Spinach/Tender Leaf/Cilantro	Baby spinach remains very tight; cilantro improving.	Wind abrasion, leaf burn, and occasional yellowing.
Lettuce (All types)	Desert transition ongoing; romaine & icebergs still short.	Tip burn, mildew, rib discoloration; markets remain high.
Tomatoes (All types)	Supplies from Florida limited; Higher markets, especially on Romas.	Good color; occasional softness
Green Onions	Slowly improving, though volume still light.	Continued tip burn; sizing trending better week over week.
Mushrooms	Stable production and balanced market.	Clean, consistent quality.
Tomatillos	Still very tight; high prices.	Softness, pale color, and pressure sensitivity.
Onions	Solid storage crop; damp NW weather slowing finishing.	Clean internals; some external staining from late rains.

Item	Supply / Market Direction	Quality & Issues
Potatoes	Plentiful Russets; sweet potatoes in strong holiday pull.	Very good internals; light surface scurf on sweets.
Squash (Yellow/Zucchini)	Steady Mexican supply; moderate pricing.	Good color; occasional wind scarring.

Berries

- **Strawberries** – CA nearly finished; Availability is tight, with poor quality. Mexico and desert volumes inching up but remain **light and variable**. Some softness and inconsistent sizing continue.
- **Raspberries** – Still tight overall, though Mexican yields are improving. Markets remain high.
- **Blueberries** – Imports from Peru and Chile continue to build; Argentina contributing modestly. Market softening slightly with mixed sizing but solid flavor.
- **Blackberries** – Mexico remains the bright spot: **excellent firmness, color, and consistent supply**.

Outlook (Next Few Weeks)

- **Leafy greens:** Shortages expected until desert yields normalize—likely **late November into early December**.
- **Holiday veg:** Celery, beans, herbs, Brussels sprouts, and cranberries remain high through the Thanksgiving peak.
- **Citrus:** Navel sizing expected to improve as harvest progresses; internal quality remains excellent.
- **Limes & pineapples:** Weather-related tightness possible if Central American moisture continues.
- **Berries:** Blueberry imports will improve availability; **strawberries stay volatile until Mexican production stabilizes**.
- **Freight:** Rates trending higher due to tight capacity and holiday demand.