



VINYARD

The Weekly Vine – Produce Market Update

December 5 - 11, 2025

Overview & Key Themes — December 5, 2025

- New Desert-region (CA/AZ) production is **increasing but still below seasonal norms**, keeping **leafy greens and tender-leaf items tight and quality mixed**.
- Mexico's fall programs (veg + tropicals) continue expanding, but **recent humidity + cool nights** are producing **variable sizing and external scarring** in sensitive items.
- **Imports from Peru, Chile, Central Mexico, and offshore** continue building for **grapes, berries, and winter melons**, helping stabilize volume.
- **Holiday demand** remains elevated across celery, potatoes (especially sweet potatoes), winter squash, Brussels sprouts, and storage onions.
- **Freight/logistics** are volatile: increased port activity, border wait times (Laredo/San Diego), and early-winter weather disruptions are contributing to occasional delays — **tropical fruit and Mexican veg especially affected**.

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples	Ample overall; larger profiles most available	High sugar and crispness; premium Honeycrisp/Cosmic Crisp strong. Small sizes remain tighter.
Avocados	Strong supplies from Mexico, prices lower.	Good dry matter; consistent ripening. Occasional lenticel spotting from recent humidity.
Bananas	Steady volume from Central America	Ripening uniform; minor peel freckles from transit moisture but no major defects.
Grapefruit	Good CA/TX availability; markets stable	Good color and internal sweetness; normal size distribution.
Limes	Tighter availability; pricing higher	Weather impacts; thinner skins = higher dehydration risk. Handle cold-chain carefully.
Oranges (Navels)	CA harvest expanding; supply improving weekly	Excellent sugars; sizing leaning mid-to-large. Some early-season puffiness but improving.
Cantaloupe	Imports + Mexico supporting supply	Good brix overall; some surface scarring and color inconsistency from moisture.
Honeydew	Volume improving from Mexico	Flesh quality solid; occasional external blemishes and sugar spotting.

Item	Current Supply & Pricing	Quality & Notes
Watermelon	Mexico supplying most volume; markets steady	Flavor good; occasional quality issues and transit bruising on larger fruit.
Pineapple	Tight supply due to Central American rains	High sugars; some lots show crown rot, translucency, or scarring from delayed harvest windows.

Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus	Peru steady; Mexico slowly increasing	Slightly smaller sizing ; some knuckling from past moisture events.
Bell Peppers	Western supply moderate; Mexico improving	Good color; sizing still variable. Green bells tighter than colored.
Jalapeño & Poblano	Still tight ; prices elevated	Mixed sizing; pale shoulders and tender tips from cool nights.
Broccoli	Limited ; pricing elevated	Pin rot, hollow stem, and rain-related defects continue.
Cauliflower	Very tight ; markets extremely firm	Undersized heads, leaf intrusion, and weather blemishes persistent.
Brussels Sprouts	Very tight supplies, high prices continue.	Smaller sizing; some insect scarring and internal spotting.
Celery	Good holiday-driven demand; supply moderate	Mild fringe burn common
Carrots	Adequate and stable	Firm, good color; no major issues. Still promotable.
Spinach / Tender Leaf / Cilantro / Arugula	Very limited availability	Leaf burn, small leaf profiles, lower weights, and weather-related defects linger.
Lettuce (All Types)	Desert transition slow; supply limited	Light heads, rib discoloration, tip burn, uneven weights — especially on hearts/value-added.
Tomatoes (All Types)	Florida light; Mexico improving; markets slightly elevated	Good color; occasional pressure bruising and softness on Romas.
Green Onions	Gradually improving	Some tip burn; sizing improving week-over-week as desert fields strengthen.
Mushrooms	Balanced; steady markets	Uniform size/quality; no supply disruptions.
Tomatillos	Limited availability ; strong demand	Softness and sticky husk common; shorter shelf-life.
Onions	Strong storage-crop availability	Clean internals; some external staining from wet NW weather.

Item	Supply / Market Direction	Quality & Issues
Potatoes (Russet & Sweet)	Strong supplies; holiday demand steady	Very clean internals; light scurf on sweets but overall high quality.
Squash (Yellow & Zucchini)	Steady Mexico supply	Good color/firmness; wind scarring still visible in some lots but quality workable.

Berries

Strawberries

- Supply **very tight**.
- CA nearly finished; Mexico increasing but behind pace from earlier weather delays. Florida berries starting, should help availability
- Markets remain **high**; sizing inconsistent, occasional bruising and white shoulders.

Raspberries

- Mexico (Baja + C. Mexico) improving; markets firm but stable.
- Quality generally good; some lots with softer fruit from humidity.

Blueberries

- Peru and early Chile shipments stabilizing supply; Mexico gaining momentum.
- Pricing easing; flavor generally good.
- Some size variation between import regions.

Blackberries

- Mexico remains strong supplier; consistent volume.
- Quality solid with good firmness; occasional red cell from transit swings.

Outlook (Next Few Weeks)

- **Leafy Greens & Tender Leaf:**
Supply remains strained until desert yields fully normalize — likely **mid-December**, weather permitting.
- **Holiday/Winter Vegetables:**
Good supply on storage crops (potatoes, onions, squash, carrots).
Brussels sprouts and cauliflower will remain **tight** through mid-December.
- **Citrus & Tropical Fruits:**
CA navels improving; expect stable pricing.
Limes/pineapples likely remain **tight** as Central American weather impacts continue.
- **Berries:**
Blueberries improving via imports; raspberries and blackberries steady.
Strawberries remain **volatile** until Mexico + Florida volume expands.
- **Freight/Logistics:**
Expect periodic delays from port congestion, border traffic, and early-season storms impacting transit times — particularly for **Mexican veg, berries, and tropical fruit**.