



VINYARD

The Weekly Vine – Produce Market Update

December 19 - 25, 2025

Overview & Key Themes

- Desert-region (CA/AZ) crops continue gradual improvement, but yields remain below seasonal norms; leafy greens and tender leaf items stay tight with lingering weather-related defects and light weights.
- Mexico's winter vegetable and tropical programs continue expanding, though cool nights and intermittent humidity are still driving variable sizing, color inconsistency, and surface scarring—most notable in squash, peppers, cucumbers, and melons.
- Import programs (Chile, Peru, Offshore, Central MX) are strengthening across grapes, berries, melons, and citrus, helping offset domestic gaps and stabilizing select markets post-holiday.
- Holiday pull remains elevated but begins easing after Christmas on celery, sweet potatoes, winter squash, oranges, berries, and Brussels sprouts; retail demand expected to normalize heading into year-end.
- Logistics/freight remain uneven: residual holiday congestion, border delays at Laredo/Pharr, winter weather in the West, and heavier port volumes continue causing sporadic delays—especially for berries, tropicals, and Mexican vegetables.

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples	Ample across most varieties; larger fruit dominant	High sugars and firmness; excellent eating quality.
Avocados	Strong Mexican volume; markets steady	Good dry matter; minor spotting persists from humidity swings.
Bananas	Steady Central American volume	Uniform ripening; light peel freckles from transit humidity.
Grapefruit	Good CA/TX availability; stable markets	Good internal color and sugars; normal size spread.
Limes	Availability somewhat tight; elevated pricing	Thin skins increasing dehydration risk; sensitive to cold-chain variance.
Oranges (Navels)	CA volume building steadily	Excellent sweetness; firmness improving. Puffiness continuing to decline.
Cantaloupe	Imports + Mexico supporting moderate supply	Strong sugars; surface scarring and rind inconsistency common.

Item	Current Supply & Pricing	Quality & Notes
Honeydew	Mexico improving volume	Internal quality good; sporadic sugar spotting and rind scarring.
Watermelon	Mexico steady; markets stable	Good flavor; occasional transit bruising.
Pineapple	Light supply continues from Central America	High sugar and aroma; translucency, scarring, and crown issues in select lots.

Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus	Peru steady; Mexico slowly increasing	Thinner sizing; sporadic knuckling tied to recent moisture.
Bell Peppers	Mexico improving; West steady	Good color; sizing inconsistencies continue.
Jalapeño & Poblano	Availability tight; firm markets	Pale shoulders, soft tips, and mixed sizing from cool nights.
Broccoli	Still limited availability; high markets	Pin rot, hollow stem, and discoloration remain concerns.
Cauliflower	Extremely tight; peak seasonal pricing	Undersized heads, leaf intrusion, and weather blemishes persistent.
Brussels Sprouts	Very tight; high prices continue	Smaller diameter; insect scarring and internal spotting.
Celery	Strong holiday pull easing slightly	Fringe burn common; overall quality workable.
Carrots	Adequate and stable	Strong color and firmness; promotable.
Spinach / Tender Leaf / Cilantro / Arugula	Very limited; elevated markets	Small leaves, light weights, and weather defects persistent.
Lettuce (All Types)	Desert yields improving but still light	Light heads, rib discoloration, tip burn, uneven weights—romaine hearts most impacted.
Tomatoes (All Types)	Florida light but improving; Mexico building	Good color; occasional softness and pressure bruising on Romas.
Green Onions	Gradual weekly improvement	Mild tip burn persists; sizing and weights trending better.
Mushrooms	Balanced market	Consistent quality and availability.
Tomatillos	Very limited	Sticky husks, shorter shelf life
Onions	Strong storage-crop position	Clean internals; some external staining from wet NW weather.

Item	Supply / Market Direction	Quality & Issues
Potatoes (Russets & Sweet)	Strong supplies; steady demand	Russets clean internally; sweets show light scurf but overall very good quality.
Squash (Yellow & Zucchini)	Mexico steady; moderate supply	Good color and firmness; wind scarring improving but still present.

Berries

Strawberries

- Mexican volume slowly increasing.
- CA essentially finished; Florida contributing limited volume.
- Some markets remain high; mixed sizing with white shoulders, bruising, and softness common.

Raspberries

- Mexico (Baja + Central) increasing gradually; markets firm but stable.
- Quality generally good; isolated softness tied to humidity.

Blueberries

- Peru and Chile imports stabilizing supply; Mexico also increasing.
- Pricing easing post-holiday.
- Some size variation across origins; flavor strong overall.

Blackberries

- Mexico continues strong production.
- Good firmness and flavor; occasional red cell from transit temperature swings.

Outlook (Next Few Weeks)

Leafy Greens & Tender Leaf

- Desert yields remain below expectations; gradual improvement expected into early January if weather stabilizes.

- Quality challenges (light weights, burn, discoloration) likely to persist short term.

Holiday / Winter Vegetables

- Solid availability on onions, potatoes, winter squash, carrots, and storage crops.
- Cauliflower and Brussels sprouts remain the tightest items through year-end.

Citrus & Tropical Fruits

- CA navels strengthening; markets stabilizing into January.
- Limes and pineapples remain tight due to ongoing Central American production gaps.

Berries

- Blueberries continue improving via imports.
- Raspberries and blackberries steady.
- Strawberries remain volatile and elevated until Mexico and Florida volumes build more meaningfully—expected late December into early January.

Freight & Logistics

- Intermittent delays continue from holiday congestion, border wait times, and winter weather.
- Mexican vegetables, berries, and tropicals remain the most impacted categories.