



VINYARD

The Weekly Vine – Produce Market Update

January 2 – 6, 2026

Overview & Key Themes

- Desert-region (CA/AZ) production continues slow, incremental improvement; yields remain below seasonal norms, keeping leafy greens and tender leaf items tight with ongoing weather-related defects, light weights, and inconsistent sizing.
- Mexico's winter vegetable and tropical programs are expanding further, though cool nights and intermittent humidity continue to drive variable sizing, color inconsistency, and surface scarring—most notable in squash, peppers, cucumbers, tomatoes, and melons.
- Import programs (Chile, Peru, Offshore, Central MX) remain strong across grapes, berries, melons, and citrus, helping offset domestic gaps and bring modest post-holiday market stabilization.
- Holiday demand has largely eased following Christmas and New Year's, with retail pull normalizing across celery, sweet potatoes, winter squash, citrus, berries, and Brussels sprouts.
- Logistics remain uneven: residual holiday congestion, winter weather disruptions in the West and Midwest, and ongoing border delays at Laredo/Pharr continue to cause sporadic delays—especially for Mexican vegetables, berries, and tropicals.

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples	Ample across most varieties; markets steady	Excellent firmness and sugars; larger sizes dominate.
Avocados	Strong Mexican volume; pricing stable	Good dry matter; minor skin spotting persists.
Bananas	Steady Central American supply	Uniform ripening; occasional peel freckles from transit humidity.
Grapefruit	Good CA/TX availability	Solid internal color and sugars; normal size range.
Limes	Tight supply; elevated markets	Thin skins; dehydration risk and cold sensitivity remain.
Oranges (Navels)	CA volume building	Excellent sweetness; firmness improving; puffiness declining.
Cantaloupe	Imports and Mexico providing moderate supply	Good sugars; surface scarring and rind inconsistency common.
Honeydew	Mexico volumes improving	Good internal quality; sporadic rind scarring.
Watermelon	Mexico steady	Good flavor; occasional transit bruising.

Item	Current Supply & Pricing	Quality & Notes
Pineapple	Light Central American supply	High sugars and aroma; translucency and crown issues in some lots.

Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus	Peru steady; Mexico gradually increasing	Thin sizing; occasional knuckling.
Bell Peppers	Mexico improving; West steady	Good color; size variability persists.
Jalapeño & Poblano	Tight availability; firm markets	Pale shoulders, soft tips, mixed sizing.
Broccoli	Limited supplies; high markets	Pin rot, hollow stem, discoloration ongoing.
Cauliflower	Extremely tight; peak seasonal pricing	Undersized heads; leaf intrusion and blemishes persist.
Brussels Sprouts	Very tight; markets remain high	Small diameter; insect scarring and internal spotting.
Celery	Demand easing post-holiday	Fringe burn common; quality fair overall.
Carrots	Adequate and stable	Strong color and firmness; promotable.
Spinach / Tender Leaf / Cilantro / Arugula	Very limited; elevated markets	Small leaves, light weights, weather-related defects.
Lettuce (All Types)	Desert yields improving slowly	Light heads, rib discoloration, tip burn; romaine hearts tightest.
Tomatoes (All Types)	Florida light but improving; Mexico building	Good color; occasional softness and pressure bruising on Romas.
Green Onions	Gradual improvement	Mild tip burn persists; weights improving.
Mushrooms	Balanced supply	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 conditions.
Potatoes (Russets & Sweet)	Strong supplies; steady demand	Russets clean; 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

- Mexico volume slowly increasing; Florida contributing light supply.
- CA essentially finished.
- Markets remain elevated with mixed sizing, white shoulders, bruising, and softness common.

Raspberries

- Mexico (Baja + Central) continuing gradual increases; markets firm but stable.
- Generally good quality; isolated softness tied to humidity.

Blueberries

- Peru and Chile imports stabilizing supply; Mexico also contributing.
- Post-holiday pricing easing.
- Some size variation by origin; 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; slow improvement anticipated through early January if weather cooperates.
- Quality challenges (light weights, burn, discoloration) persist near term.

Holiday / Winter Vegetables

- Solid availability on onions, potatoes, carrots, winter squash, and storage crops.
- Cauliflower and Brussels sprouts remain the tightest and highest-priced items into mid-January.

Citrus & Tropical Fruits

- CA navels continue strengthening with stable January markets.
- Limes and pineapples remain constrained due to production gaps.

Berries

- Blueberries continue improving via imports.
- Raspberries and blackberries steady.
- Strawberries remain volatile until Mexico and Florida volumes increase more meaningfully through early-to-mid January.

Freight & Logistics

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