



# VINYARD

## The Weekly Vine – Produce Market Update

January 9 - 15, 2026

### Overview & Key Themes

- **Desert-region (CA/AZ) production** is gradually improving, but yields for leafy greens and tenderleaf items remain below seasonal norms. **Growers report ongoing inconsistent sizing, light weights, and quality defects linked to recent temperature swings.**
- **Mexico's winter vegetable and tropical programs** are expanding, **though cool nights and sporadic humidity events continue to contribute to variable sizing, surface scarring, and color issues — especially in squash, peppers, cucumbers, tomatoes, and melons.**
- **Import programs** (Chile, Peru, Offshore, Central MX) are strong across grapes, berries, melons, and citrus, helping to offset domestic tightness and support post-holiday market stabilization.
- **Logistics & freight** remain uneven — winter weather disruptions in the West/Midwest, lingering port congestion, and border delays at Laredo/Pharr continue to affect multiple categories, especially Mexican vegetables, berries, and tropicals.

### Fruit & Citrus

<u>Item</u>	<u>Current Supply &amp; Pricing</u>	<u>Quality &amp; Notes</u>
Apples	Ample to steady markets	Excellent firmness; larger sizes more available
Avocados	Strong Mexican volume; stable	Good dry matter; occasional surface markings
Bananas	Stable Central American supply	Uniform ripening; <b>some transit freckles</b>
Grapefruit	Good domestic availability	Crisp texture; solid internal color
Limes	<b>Tight supply; firm markets</b>	<b>Thin skins; dehydration risk remains</b>
Oranges (Navels)	California production strengthening	Sweet flavor; <b>higher percentage of larger sizes</b>
Cantaloupe	Imports/Mexico moderate	Good sugars; <b>surface scarring and rind inconsistency</b>
Honeydew	Mexico increasing	Generally good quality; <b>rind scarring sporadic</b>
Watermelon	Mexico steady	Sweet flavor; <b>transit bruising occasional</b>
Pineapple	Light supply	High sugars; <b>some translucency and crown issues</b>

### Vegetables, Herbs, Greens & Others

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality &amp; Issues</u>
Asparagus	Peru & Mexico	<b>Thin sizing</b> ; tight tips

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality &amp; Issues</u>
Bell Peppers	Mexico increasing; West steady	Good color; size variation
Jalapeño & Poblano	Limited availability; markets elevated	Mixed sizing; pale shoulders
Broccoli	Limited; elevated markets	Pin rot, hollow stem issues
Cauliflower	Extremely tight; higher pricing	Undersized heads; leaf intrusion
Brussels Sprouts	Very tight; high markets	Small diameter; insect scarring appears to be trending better
Celery	Post-holiday normalizing	Fringe burn common; fair quality
Carrots	Stable and promotable	Strong color; good firmness
Spinach / Tender Leaf / Herbs	Very limited; elevated markets	Small leaves; weather-related defects
Lettuce (All Types)	Desert yields slowly improving	Light heads; tip burn and discoloration
Tomatoes (All Types)	FL light but improving; Mexico building	Good color; occasional softness
Green Onions	Improving; still elevated markets	Mild tip burn; weights improving
Mushrooms	Balanced supply	Consistent quality/availability
Tomatillos	Very limited	Sticky husks; shorter shelf life
Onions	Strong storage supply	Clean internals; external staining in places
Potatoes	Strong supplies; steady demand	Russets clean; sweet overall good quality
Squash (Yellow & Zucchini)	Mexico steady; moderate supply	Improving wind scarring; good firmness

## Berries

### Strawberries

- Mexico volume slowly increasing; Florida light but building.
- California nearly finished.
- Markets elevated; common issues include mixed sizing, white shoulders, bruising, and softness.

### Raspberries

- Markets firm but generally stable; isolated softness reported.

### Blueberries

- Imports from Peru/Chile strong; Mexico contributing.
- Prices easing post-holidays; size variation by origin noted; flavor overall solid.

## Blackberries

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



## Outlook (Next Few Weeks)

### Leafy Greens & Tender Leaf

- Desert yields remain below expectations; slow improvement anticipated if weather cooperates.
- Quality challenges (light weights, burn, discoloration) persist near term.

### Winter Vegetables

- Solid availability on onions, potatoes, carrots; winter squash & storage crops stable.
- Cauliflower and Brussels sprouts remain the tightest, highest-priced items.

### Citrus & Tropical Fruits

- Navels continue strengthening with stable markets.
- Limes and pineapples remain tight.

### Berries

- Blueberries continue improving through imports.
- Raspberries/blackberries steady.
- Strawberries volatile until Mexico/Florida volumes build more fully.

### Freight & Logistics

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