



VINYARD

The Weekly Vine – Produce Market Update

February 20 - 27, 2026

Market Snapshot

- **Desert growing regions in California and Arizona** are experiencing more stable daytime temperatures; however, prior **cold mornings continue to slow growth on leafy greens and tenderleaf items. Expect lighter case weights and minor cosmetic issues to persist short term.**
- **Mexico** winter production continues to ramp up across key vegetable, berry, and tropical categories. **Cooler overnight temperatures are impacting sizing and exterior color on select commodities,** but overall crossings into the US are increasing.
- **Imports from Chile and Peru** remain active, supporting fruit, grape, and asparagus programs.
- **Inbound transportation remains inconsistent due to winter weather systems and congestion at major border crossings.** Mexican vegetables, berries, and tropicals continue to experience the most freight volatility and occasional delays.

Fruit & Citrus

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Apples	Good availability; markets steady	Larger sizes dominant; strong crunch and balanced sugars
Avocados	Mexico supply strong; pricing mostly stable	Good oil development; minor external scarring common
Bananas	Steady Central America arrivals	Uniform ripening; light speckling from transit
Grapefruit	Solid domestic supply	Good internal color; consistent sizing
Limes	Supplies remain tight; elevated markets	Smaller fruit; thin skins; dehydration showing on some lots
Oranges (Navels)	California volume building	Sweet flavor profile; heaviest on 88ct and 72ct
Cantaloupe	Moderate supply	Good sugar content; light surface scarring
Honeydew	Mexico production increasing	Quality mostly good; occasional cosmetic defects

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Watermelon	Markets elevated due to cooler Mexico weather	Sweet eating quality; wide size range
Pineapple	Limited supply; firm pricing	High sugar content; occasional translucency and crown wilt

Vegetables, Herbs, Greens & Others

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality & Issues</u>
Asparagus	Peru and Mexico steady	Thinner sizing; variable tip quality
Bell Peppers	Mexico increasing; CA stable	Vibrant color; sizing inconsistent
Jalapeño & Poblano	Tight supplies; elevated pricing	Lighter color; size variability
Broccoli	Tight supply; elevated pricing	Occasional hollow core and pin rot
Cauliflower	Extremely tight; elevated pricing	Small heads; excess wrapper leaves
Brussels Sprouts	Remain very limited; elevated pricing	Small sizing; gradual quality improvement
Celery	Supply improving gradually	Fringe burn and slight pithiness reported
Carrots	Stable supply and pricing	Overall good quality
Spinach / Tender Leaf / Herbs	Very limited; elevated pricing	Smaller leaves; cold-related yellowing
Lettuce (All Types)	Slow desert recovery	Lighter weights; tip burn present
Tomatoes (All Types)	Mexico volume increasing; Florida volume improving	Good color; occasional softness; larger sizing
Green Onions	Gradual improvement; markets easing slightly	Mild tip burn; better bunch weights
Mushrooms	Balanced supply	Consistent sizing and quality
Tomatillos	Very limited availability	Sticky husks; shorter shelf life
Onions	Good overall availability	Mostly sound; minor external staining
Potatoes	Ample supply; steady demand	Good quality across most sizes

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality & Issues</u>
Squash (Yellow & Zucchini)	Mexico steady	Firm texture; minor wind scarring

Berries

Strawberries

- Mexico volume continues increasing; Florida slowly improving.
- Markets remain elevated with sizing variability.
- Quality concerns include white shoulders, bruising, and occasional softness.

Raspberries

- Markets firm but generally steady.
- Some softness and reduced shelf life reported.

Blueberries

- Strong imports from Peru and Chile, supplemented by Mexico.
- Markets easing; size varies by origin; flavor profile strong overall.

Blackberries

- Mexico production remains strong.
- Good firmness; occasional red cell due to transit temperature swings.

Looking Ahead

- Leafy greens and tenderleaf items should gradually improve as desert temperatures stabilize.
- Cauliflower and Brussels sprouts are expected to remain tight with elevated pricing in the near term.
- Citrus volume will continue building; limes and pineapples remain the most constrained.
- Strawberry markets likely remain the most volatile berry category.
- Freight disruptions and border congestion may continue creating temporary supply gaps and short-term market swings across select commodities.