



VINYARD

The Weekly Vine – Produce Market Update

March 13-19, 2026

Market Snapshot

- Desert growing regions in California and Arizona are seeing **HOT daytime temperatures** with cooler overnight lows, slowing growth on leafy greens and tenderleaf items. **Case weights remain below normal with occasional cosmetic defects.** The hot temps could cause some issues over the coming weeks.
- Mexico production continues to strengthen, especially for vegetables, berries, and tropical fruit. **Cooler nights are still affecting color and sizing on some crops, but border crossings are increasing week over week.**
- Imports from Chile and Peru remain active, supporting supply of grapes, blueberries, asparagus, and late-season stone fruit.
- Freight conditions remain inconsistent, driven by lingering winter weather and **congestion at Texas and Arizona border crossings.** Mexican vegetables, berries, and tropicals continue to show the most variability in transit times.

Fruit & Citrus

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Apples	Strong availability; markets steady	Large sizes dominate; crisp texture; strong sugar development
Avocados	Mexico volume elevated; markets steady to slightly higher	Good oil content; some cosmetic scarring on larger fruit
Bananas	Steady arrivals from Central America	Even ripening; minor transit scarring
Grapefruit	Ample domestic supply	Excellent internal color; consistent sizing
Limes	Tight supply; elevated markets continue	Smaller fruit; lighter green color; occasional dehydration

<u>Item</u>	<u>Current Supply & Pricing</u>	<u>Quality & Notes</u>
Oranges (Navels)	California production peaking	Sweet flavor; strongest on 72ct and 88ct
Lemons	Steady supply; markets elevating slightly	Good juice content; minor rind blemishes
Cantaloupe	Moderate supply from Central America	Strong sugar levels; occasional surface webbing
Honeydew	Mexico imports increasing	Generally good quality; some cosmetic scarring
Watermelon	Supply improving; markets easing slightly with quality variability	Wide size range; strong internal color
Pineapple	Limited supply; Elevated pricing persists	High sugars; occasional crown wilt and translucency

Vegetables, Herbs, Greens & Others

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality & Issues</u>
Asparagus	Peru and Mexico steady	Predominantly thinner sizing; tip quality varies
Bell Peppers	Mexico increasing; markets easing	Bright color; inconsistent sizing
Chili Peppers (Jalapeño & Poblano)	Limited availability; Higher prices	Smaller sizing; lighter color
Broccoli	Improving supply	Quality better; occasional hollow core and pin rot reported
Cauliflower	Markets improving slightly	Small heads; excess wrapper leaves
Brussels Sprouts	Supplies improving; pricing easing	Small sizing; gradual quality improvement
Celery	Gradual supply improvement	Fringe burn and minor pith
Carrots	Stable supply and pricing	Overall good quality
Spinach / Tender Leaf / Herbs	Very limited; markets high	Smaller leaves; yellowing from cold weather

<u>Item</u>	<u>Supply / Market Direction</u>	<u>Quality & Issues</u>
Lettuce (All Types)	Slow improvement out of desert	Lighter weights; tip burn remains present
Tomatoes (All Types)	Mexico volume rising; Florida improving; prices elevated	Good color; occasional softness; larger sizes dominant
Green Onions	Supply improving; markets easing	Mild tip burn; improved bunch weights
Mushrooms	Balanced supply	Consistent quality and sizing
Tomatillos	Very limited availability	Sticky husks; short shelf life
Onions	Good availability	Minor external staining; overall sound quality
Potatoes	Ample supply; steady demand	Strong quality across sizes
Squash (Yellow & Zucchini)	Markets elevated	Firm texture; light wind scarring

Berries

Strawberries

- Mexico crossings decreasing slightly while Florida production continues gradual recovery.
- California volumes beginning to increase.
- Markets remain slightly elevated with variable sizing.
- Quality concerns include white shoulders, bruising, and occasional softness.

Raspberries

- Markets firm but stable.
- Some softness and reduced shelf life being reported.

Blueberries

- Strong imports from Peru and Chile, supplemented by Mexico.
- Markets higher but steady with good flavor overall.
- Sizing varies depending on origin.

Blackberries

- Mexico production steady and strong.
- Good firmness overall.
- Occasional red cell development from temperature swings during transit.

 Looking Ahead

- Leaf lettuce, romaine, spinach, and tenderleaf items should **gradually improve in weight and quality** as desert growing conditions stabilize.
- **Lime and pineapple markets will likely remain elevated** due to tight supply.
- **Strawberry pricing will stay volatile**, depending on weather in Mexico and freight movement.
- Ongoing **border congestion and freight variability** may continue to cause temporary supply gaps and short-term market fluctuations across several Mexican commodities.