








VINYARD

The Weekly Vine – Produce Market Update

June 12 - 18, 2026

Market Snapshot

- Salinas Valley lettuce production remains under severe pressure from INSV, soil-borne diseases, and weather-related yield losses. Supplies remain highly constrained with no significant relief expected this week. 
- Mexico border crossings continue providing steady volume on cucumbers, grapes, mangoes, and melons, helping stabilize several categories. 
- California, Arizona, Georgia, and the Carolinas continue ramping seasonal production, improving availability on melons, tomatoes, and several summer vegetables. 
- Freight markets remain inconsistent with elevated fuel surcharges, tight truck availability in some regions, and periodic transit delays. 
- Transition pressure remains active on avocados, lettuce, lemons, chili peppers, and pineapples. 

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples 	Strong supply; stable pricing	Excellent quality and sizing
Avocados 	Tight supply; elevated and volatile markets	High dry matter; accelerated ripening; sizing substitutions possible
Bananas 	Stable imports	Consistent color and condition
Grapefruit 	Moderate supply	Good internal quality; large sizes remain limited
Limes 	Supply improving; pricing easing gradually	Small sizes dominate; larger fruit remains short
Oranges (Valencias) 	New crop volume increasing	Excellent juice content and flavor
Lemons 	Tight supply; firm markets continue	District transition limiting availability; smaller fruit very limited

Item	Current Supply & Pricing	Quality & Notes
Cantaloupe ●	White Fly devastating vines – significant supply issues	Quality could be an issues
Honeydew ●	Improved availability	Quality continues improving
Watermelon ●	Supply gaps	Should improve next week
Pineapple ●	Tight supply persists	Size flexibility recommended; shelf-life concerns remain
Grapes ●	Strong import and domestic supply	Good quality and sizing
Mangoes ●	Increasing availability	Excellent color and flavor
Papaya ●	Steady supply	Occasional softness reported
Kiwi ●	Strong supply	Excellent firmness and flavor

🍃 Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus ●	Supply improving; markets easing	Better sizing and quality reported
Bell Peppers ●	Gradual improvement	Size and color variability continue
Chili Peppers ●	Very tight supply	Elevated pricing; smaller fruit common
Broccoli ●	Slowly improving supply	Better color; occasional field variability
Cauliflower ●	Stabilizing	Smaller heads and trim loss still reported
Brussels Sprouts ●	Tight supply continues	Limited volume expected into July
Celery ●	Improving availability	Some fringe burn remains
Carrots ●	Strong supply	Excellent quality and availability
Spinach / Tender Leaf / Herbs ●	Tight supply	Quality concerns persist; yellowing reported
Lettuce (All Types) ●	Demand far exceeds supply	Disease pressure, light weights, tip burn, and prorates continue

Item	Supply / Market Direction	Quality & Issues
Tomatoes ●	Supply improving steadily	Mexico and eastern production increasing; quality becoming more consistent
Green Beans ●	Limited availability	Elevated markets and mixed quality
Cucumbers ●	Good supply	Improved sizing and consistency
Green Onions ●	Slight tightening	Minor tip burn reported
Mushrooms ●	Steady supply	Consistent quality and sizing
Tomatillos ●	Improved supply	Better overall quality
Onions ●	Gradually tightening	Good quality overall
Potatoes ●	Ample supply	Excellent quality and availability
Squash ●	Active market	Cosmetic scarring remains common
Eggplant ●	Moderate to good supply	Improved quality
Corn ●	Light to moderate supply	Uneven fill and smaller ears reported

Berries

Strawberries ●

- California production continues improving gradually
- Quality better than recent weeks, though occasional softness and bruising remain possible

Raspberries ●

- Moderate but limited supply
- Delicate condition; shorter shelf life expected

Blueberries ●

- Supply tightening compared with early June
- California helping offset regional production gaps, but availability remains below ideal levels

Blackberries ●

- Tight but stable supply
- Softness and red-cell issues continue in some growing regions

Looking Ahead

- Lettuce markets are expected to remain the most challenging category through at least late June as disease pressure and reduced yields persist in Salinas. ●
- Avocado supplies are expected to remain tight until Mexico's Flor Loca crop gains momentum in July. ●
- Tomato availability should continue improving as eastern and Mexican production expands. ●
- Chili peppers remain one of the most volatile vegetable categories. ●
- Pineapple markets are expected to remain elevated through the balance of June. ●
- Cucumbers, carrots, potatoes, and tomatillos should remain stable to improving. ●
- Domestic melon production will continue ramping up, improving cantaloupe, honeydew, and watermelon availability. ●
- Blueberry supplies may tighten temporarily before stronger Pacific Northwest production begins later in June. ●
- Strawberry production should continue improving if favorable California weather persists. ●
- Freight conditions are expected to remain challenging due to fuel surcharges and inconsistent truck availability. ●