








VINYARD







The Weekly Vine – Produce Market Update

June 26 – July 2, 2026

Market Snapshot

- **Salinas Valley lettuce production remains under significant pressure** from INSV, soil-borne diseases, tip burn, and light weights. Supplies remain well below normal, with prorates and elevated markets expected to continue into early July. 
- **California summer harvests continue expanding** with increased production of tomatoes, cucumbers, peppers, eggplant, and melons, helping improve overall vegetable availability. 
- **Mexico continues providing steady crossings** of cucumbers, grapes, limes, tomatoes, and tropical fruit, helping offset regional supply gaps. 
- **Freight remains inconsistent** with higher transportation costs, fuel surcharges, and intermittent truck availability continuing to influence delivered pricing nationwide. 
- **Transition pressure persists** on avocados, lemons, lettuce, chili peppers, Brussels sprouts, and pineapples as several growing regions continue seasonal changeovers. 

Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples 	Strong supply; stable pricing	Excellent quality across most varieties
Avocados 	Tight supply; elevated markets remain	Flor Loca harvest slowly increasing but relief remains limited; rapid ripening continues
Bananas 	Stable imports	Consistent quality and color
Grapefruit 	Moderate supply	Larger fruit remains limited
Limes 	Good supply; pricing easing	Small sizes remain most available
Oranges (Valencias) 	Strong new crop volume	Excellent juice content and eating quality

Item	Current Supply & Pricing	Quality & Notes
Lemons ●	Tight supply; firm markets	District transition continues; smaller fruit remains scarce
Cantaloupe ●	Supplies remain VERY limited	White Fly pressure continues reducing yields; sizing remains inconsistent
Honeydew ●	Supplies remain VERY limited	Quality continues improving as production ramps up in new areas
Watermelon ●	Strong domestic supply	Excellent quality with improving availability
Pineapple ●	Tight supply persists	Flexibility on size recommended; elevated pricing continues
Grapes ●	Strong domestic and import supply	Excellent quality and sizing
Mangoes ●	Transitioning between Mexico and other growing regions	Good flavor; some variety and sizing variability
Papaya ●	Steady supply	Occasional softness reported
Kiwi ●	Strong supply	Excellent firmness and eating quality

🗨 Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus ●	Good supply	Excellent sizing and quality
Bell Peppers ●	Improving supply	California production increasing; quality improving
Chili Peppers ●	Very tight supply	Elevated pricing continues; smaller fruit common
Broccoli ●	Moderate supply	Better overall quality; occasional field variability
Cauliflower ●	Stabilizing	Smaller heads still common
Brussels Sprouts ●	Tight supply	Limited harvests continue into July
Celery ●	Moderate supply	Minor fringe burn still reported

Item	Supply / Market Direction	Quality & Issues
Carrots ●	Strong supply	Excellent quality and availability
Spinach / Tender Leaf / Herbs ●	Tight supply	Yellowing, disease pressure, and light weights continue
Lettuce (All Types) ●	Demand exceeds supply	INSV, tip burn, reduced acreage, and light weights continue driving elevated markets
Tomatoes ●	Supply continues improving	California, Eastern U.S., and Mexico providing stronger volume
Green Beans ●	Limited supply	Elevated markets; quality remains mixed
Cucumbers ●	Good supply	Strong Mexican and domestic production
Green Onions ●	Slightly tight	Minor tip burn persists
Mushrooms ●	Steady supply	Consistent sizing and quality
Tomatillos ●	Good supply	Excellent availability
Onions ●	Moderate supply	Freight continues influencing delivered cost
Potatoes ●	Ample supply	Excellent quality
Squash ●	Active market	Cosmetic scarring remains common
Eggplant ●	Good supply	California production improving quality
Corn ●	Moderate supply	Better availability; occasional uneven fill remains

Berries

Strawberries ●

- California production continues improving
- Better sizing and firmness reported
- Markets expected to remain mostly stable through the holiday week

Raspberries ●

- Limited supply
- Delicate condition continues with shorter shelf life

Blueberries ●

- Pacific Northwest production beginning to increase
- Availability gradually improving

- Markets beginning to stabilize

Blackberries ●

- Limited supply
- Softness and occasional red-cell issues continue

Looking Ahead

- **Lettuce markets are expected to remain the most difficult produce category** as Salinas disease pressure continues limiting yields through early July. ●
- **Avocado supplies should slowly improve** as Flor Loca harvests expand, although pricing is expected to remain elevated in the near term. ●
- **Tomato supplies should continue strengthening** with California, Eastern U.S., and Mexican production all contributing increased volume. ●
- **Chili peppers remain one of the most volatile vegetable categories** with elevated pricing likely continuing. ●
- **Pineapple supplies remain constrained** with little significant market relief expected during the first week of July. ●
- **Cucumbers, carrots, potatoes, grapes, bell peppers, and tomatillos** should remain stable to improving. ●
- **Cantaloupe production remains challenged** by ongoing White Fly pressure, with supplies expected to stay below seasonal norms. ●
- **Blueberry availability should continue improving** as Pacific Northwest harvests gain momentum. ●
- **California strawberry production is expected to remain favorable** if mild coastal weather continues. ●
- **Freight conditions will likely remain inconsistent**, with fuel surcharges and regional truck availability continuing to impact delivered produce costs. ●