








# 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 continue running well below seasonal averages, with elevated markets and prorates expected to persist through mid-July. 
- California summer production continues expanding across tomatoes, cucumbers, peppers, squash, eggplant, melons, and sweet corn, improving overall vegetable availability. 
- Mexico maintains consistent crossings of cucumbers, tomatoes, grapes, limes, mangoes, and tropical fruit, helping stabilize supplies across multiple categories. 
- Freight remains inconsistent as truck availability varies by region while fuel and transportation costs continue influencing delivered pricing. 
- Seasonal transitions continue impacting avocados, lemons, Brussels sprouts, chili peppers, pineapples, and portions of the melon category, keeping several markets elevated. 

### Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples 	Strong supply; stable pricing	Excellent quality across all major varieties
Avocados 	Tight supply; elevated markets continue	Flor Loca harvest expanding slowly; ripening remains aggressive
Bananas 	Stable imports	Consistent quality and color
Grapefruit 	Moderate supply	Large sizes remain somewhat limited
Limes 	Good supply; steady pricing	Small and medium sizes remain most plentiful

Item	Current Supply & Pricing	Quality & Notes
Oranges (Valencias) ●	Strong seasonal volume	Excellent juice content and eating quality
Lemons ●	Tight supply; firm markets	District transition continues; small fruit remains limited
Cantaloupe ●	Supplies remain limited	White Fly pressure continues affecting yields and sizing
Honeydew ●	Improving supply	Quality improving as additional growing regions increase harvests
Watermelon ●	Strong domestic supply	Excellent quality with plentiful availability
Pineapple ●	Tight supply persists	Flexibility on sizes remains recommended
Grapes ●	Strong domestic and imported supply	Excellent sizing and overall quality
Mangoes ●	Improving supply	New growing regions increasing availability; good flavor
Papaya ●	Steady supply	Occasional softness still 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 ●	Good supply	California production continues expanding
Chili Peppers ●	Very tight supply	Elevated pricing continues; mixed sizing
Broccoli ●	Moderate supply	Good quality with occasional field variability
Cauliflower ●	Stable supply	Smaller heads remain common
Brussels Sprouts ●	Tight supply	Limited harvests continue during transition
Celery ●	Moderate supply	Minor fringe burn occasionally reported

Item	Supply / Market Direction	Quality & Issues
Carrots ●	Strong supply	Excellent quality and availability
Spinach / Tender Leaf / Herbs ●	Tight supply	Disease pressure, yellowing, and light weights persist
Lettuce (All Types) ●	Demand continues exceeding supply	INSV, tip burn, reduced acreage, and light weights continue driving markets
Tomatoes ●	Strong improving supply	California and regional production providing excellent availability
Green Beans ●	Limited supply	Elevated pricing; quality remains variable
Cucumbers ●	Good supply	Strong domestic and Mexican production
Green Onions ●	Slightly tight	Minor tip burn continues
Mushrooms ●	Steady supply	Consistent sizing and quality
Tomatillos ●	Good supply	Excellent availability
Onions ●	Crops shifting – supply gaps	Freight continues affecting delivered pricing
Potatoes ●	Prices slightly elevated and moving up	End-of-crop / storage crop bruising creating some issues
Squash ●	Improving supply	Better volume; minor cosmetic scarring remains
Eggplant ●	Good supply	California quality continues improving
Corn ●	Improving supply	Better availability with improved ear fill

### Berries

#### Strawberries ●

- California production remains strong
- Excellent sizing, firmness, and flavor
- Markets expected to remain stable through the week

#### Raspberries ●

- Limited supply continues
- Delicate condition with shorter shelf life

- Markets remain firm

### **Blueberries** ●

- Pacific Northwest harvests continue expanding
- Good quality and improving availability
- Markets gradually easing

### **Blackberries** ●

- Moderate to limited supply
- Occasional softness and red-cell issues continue
- Quality improving with newer production

### **Looking Ahead**

- Lettuce markets are expected to remain the most challenging produce category as Salinas disease pressure continues limiting production into mid-July. ●
- Avocado supplies should gradually improve as Flor Loca harvest volume increases, although elevated pricing is expected to continue in the near term. ●
- Tomato supplies should remain strong as California, Eastern U.S., and Mexican production continue providing ample volume. ●
- Chili peppers remain one of the most volatile vegetable categories with elevated pricing likely continuing through the coming week. ●
- Pineapple supplies remain constrained with limited near-term market relief expected. ●
- Cucumbers, carrots, potatoes, grapes, bell peppers, squash, sweet corn, and tomatillos should remain stable to improving. ●
- Cantaloupe production continues facing White Fly pressure, keeping supplies below normal seasonal levels. ●
- Blueberry availability should continue improving as Pacific Northwest harvests reach peak production. ●
- California strawberry production is expected to remain favorable with continued mild coastal growing conditions. ●
- Freight conditions are expected to remain inconsistent, with regional truck availability and fuel costs continuing to influence delivered produce pricing. ●