



VINYARD

The Weekly Vine – Produce Market Update

July 10 - 16, 2026

Market Snapshot

- **Salinas Valley lettuce production remains under heavy pressure** from INSV, mildew, soil-borne diseases, tip burn, and light weights. Supplies continue well below seasonal norms, with elevated markets and prorates expected to continue through mid-to-late July. ●
- **California summer vegetable production continues building** across tomatoes, cucumbers, peppers, squash, eggplant, melons, and sweet corn, supporting improved overall availability and more stable pricing. ●
- **Mexico continues providing steady crossings** of cucumbers, tomatoes, grapes, limes, mangoes, avocados, and tropical fruit, helping offset regional supply gaps. ●
- **Freight remains mixed** as truck availability varies by shipping region while fuel and transportation costs continue influencing delivered pricing. ●
- **Seasonal transitions continue affecting** avocados, lemons, Brussels sprouts, chili peppers, pineapples, and cantaloupe, keeping several markets elevated despite improving summer production elsewhere. ●

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 increasing gradually; 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
Oranges (Valencias) ●	Strong seasonal volume	Excellent juice content and eating quality
Lemons ●	Tight supply; firm markets	District transition continues; small fruit remains limited
Cantaloupe ●	Limited supply	White Fly pressure continues impacting yields and sizing

Item		Current Supply & Pricing	Quality & Notes
Honeydew	●	Improving supply	Quality and sizing continue improving
Watermelon	●	Strong domestic supply	Excellent quality with abundant availability
Pineapple	●	Tight supply persists	Flexibility on sizes remains recommended
Grapes	●	Strong domestic and imported supply	Excellent sizing and quality
Mangoes	●	Good supply	Excellent flavor with increasing seasonal availability
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	●	Tight supplies	Can see marginal quality
Bell Peppers	●	Good supply	California production continues expanding
Chili Peppers	●	Very tight supply	Elevated pricing continues; mixed sizing
Broccoli	●	Tight supplies, elevated prices	Occasional quality variability from field-to-field
Cauliflower	●	Stable supply	Smaller heads remain common
Brussels Sprouts	●	Tight supply	Limited harvests continue during seasonal transition
Celery	●	Moderate supply	Minor fringe burn occasionally reported
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, mildew, tip burn, reduced acreage, and light weights continue driving markets
Tomatoes	●	Strong supply	California, Eastern U.S., and Mexico 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

Item	Supply / Market Direction	Quality & Issues
Mushrooms ●	Steady supply	Consistent sizing and quality
Tomatillos ●	Good supply	Excellent availability
Onions ●	Crops shifting; localized supply gaps	Freight continues affecting delivered pricing
Potatoes ●	Prices slightly elevated	Storage crop bruising creating occasional quality issues
Squash ●	Improving supply	Better volume; minor cosmetic scarring remains
Eggplant ●	Good supply	California quality continues improving
Corn ●	Good supply	Excellent ear fill and improved availability

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 plentiful availability
- Markets continue easing

Blackberries ●

- Moderate 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 late July. ●
- **Avocado** supplies should continue gradual improvement as Flor Loca harvest volume increases, although elevated pricing is expected to persist 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 next week. ●
- **Pineapple** supplies remain constrained with limited near-term market relief expected. ●
- **Cucumbers, carrots, grapes, bell peppers, squash, sweet corn, mushrooms, and tomatillos** should remain stable to improving. ●
- **Cantaloupe** production continues facing White Fly pressure, keeping supplies below normal seasonal levels. ●
- **Blueberry** availability should remain excellent as Pacific Northwest harvests approach 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. ●