



VINYARD

The Weekly Vine – Produce Market Update

July 17 - 23, 2026

Market Snapshot

- **Salinas Valley lettuce production remains under severe pressure** from INSV, mildew, soil-borne diseases, tip burn, and reduced acreage. Light weights and strong demand continue to support elevated markets, with prorates remaining common into late July. ●
- **California summer vegetable production reaches peak seasonal volume** across tomatoes, cucumbers, peppers, squash, eggplant, melons, and sweet corn, improving availability and helping stabilize most vegetable markets. ●
- **Mexico continues supplying consistent volumes** of tomatoes, cucumbers, grapes, limes, avocados, mangoes, and tropical fruit, providing important market stability for many commodities. ●
- **Freight remains regionally inconsistent**, with truck availability improving in some western growing areas while fuel, labor, and transportation costs continue impacting delivered pricing. ●
- **Seasonal transitions continue affecting** avocados, lemons, Brussels sprouts, chili peppers, pineapples, asparagus, and cantaloupe, keeping several key categories elevated despite abundant 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 improving slowly; aggressive ripening continues
Bananas ●	Stable imports	Consistent color and quality
Grapefruit ●	Moderate supply	Larger sizes remain somewhat limited
Limes ●	Good supply; steady pricing	Small and medium sizes remain plentiful
Oranges (Valencias) ●	Strong seasonal supply	Excellent juice content and eating quality
Lemons ●	Tight supply; firm pricing	District transition continues; smaller fruit remains limited
Cantaloupe ●	Supplies improving – prices falling	Crops moving to new fields without the insect pressure
Honeydew ●	Good supply	Strong quality and improving size profile
Watermelon ●	Strong domestic supply	Excellent quality and plentiful availability
Pineapple ●	Tight supply persists	Flexibility on sizes continues to be recommended

Item	Current Supply & Pricing	Quality & Notes
Grapes ●	Strong domestic supply	Excellent sizing, color, and eating quality
Mangoes ●	Good supply	Strong flavor and increasing seasonal availability
Papaya ●	Steady supply	Occasional softness still reported
Kiwi ●	Strong supply	Excellent firmness and quality

🥬 Vegetables, Herbs, Greens & Others

Item	Supply / Market Direction	Quality & Issues
Asparagus ●	Tight supplies continue	Thin sizing and occasional marginal quality
Bell Peppers ●	Good supply	California production continues expanding with excellent quality
Chili Peppers ●	Very tight supply	Elevated pricing continues; mixed sizing and limited availability
Broccoli ●	Tight supplies; elevated markets	Disease pressure and variable field yields continue
Cauliflower ●	Stable supply	Smaller heads remain common
Brussels Sprouts ●	Tight supply	Seasonal transition continues limiting harvest volume
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 continue
Lettuce (All Types) ●	Demand continues exceeding supply	INSV, mildew, reduced acreage, tip burn, and light weights continue driving elevated markets
Tomatoes ●	Strong supply	California, Eastern U.S., and Mexico providing abundant availability
Green Beans ●	Limited supply	Elevated pricing; quality remains variable
Cucumbers ●	Good supply	Strong domestic and Mexican production supports stable markets
Green Onions ●	Slightly tight	Minor tip burn persists
Mushrooms ●	Steady supply	Consistent sizing and excellent quality
Tomatillos ●	Good supply	Excellent availability
Onions ●	Seasonal transitions continue – availability is limited	Short supply – small size – poor yields – new crop coming in early August
Potatoes ●	Prices slightly elevated	Storage crop bruising continues to create isolated quality concerns

Item	Supply / Market Direction	Quality & Issues
Squash ●	Good supply	Strong production with only minor cosmetic scarring
Eggplant ●	Good supply	Excellent California quality
Corn ●	Good supply	Excellent quality - consistent availability

Berries

Strawberries ●

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

Raspberries ●

- Limited supply continues
- Delicate condition and shorter shelf life
- Markets remain firm

Blueberries ●

- Pacific Northwest harvests continue expanding toward seasonal peak
- Excellent quality and plentiful availability
- Markets remain favorable

Blackberries ●

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

Looking Ahead

- **Lettuce markets** are expected to remain the most volatile produce category as Salinas disease pressure continues limiting production through the remainder of July. ●
- **Avocado supplies** should continue gradual improvement as Flor Loca harvest volume increases, although elevated pricing is likely to persist for another several weeks. ●
- **Tomatoes** should remain one of the strongest value categories with ample production from California, the Eastern U.S., and Mexico. ●
- **Chili peppers** remain among the most volatile vegetable markets, with elevated pricing expected to continue. ●
- **Pineapple supplies** are expected to remain constrained with little short-term market relief. ●
- **Cucumbers, carrots, grapes, bell peppers, squash, sweet corn, mushrooms, eggplant, and tomatillos** should continue offering stable pricing and excellent availability. ●
- **Cantaloupe** production continues facing White Fly pressure, keeping supplies below normal seasonal levels. ●
- **Blueberries** should remain abundant as Pacific Northwest production reaches peak harvest. ●
- **California strawberries** are expected to maintain strong quality and stable supplies under favorable coastal growing conditions. ●

