



# VINYARD

## The Weekly Vine – Produce Market Update

July 24 - 30, 2026

### Market Snapshot

- **Salinas Valley lettuce production remains under severe pressure** from INSV, mildew, soil-borne diseases, tip burn, reduced acreage, and persistent light weights. Demand continues to exceed supply, keeping markets elevated with prorates expected through the end of July.
- **California summer vegetable production is at seasonal peak** across tomatoes, cucumbers, peppers, squash, eggplant, melons, sweet corn, and green beans. Favorable weather continues supporting strong yields and stable markets for most commodities.
- **Mexico continues providing reliable volume** of tomatoes, cucumbers, avocados, limes, grapes, mangoes, peppers, and tropical fruit, helping offset localized production challenges and stabilize overall supply.
- **Transportation conditions continue improving**, although fuel costs, labor availability, and regional truck imbalances continue adding variability to delivered produce costs.
- **Seasonal transitions continue supporting elevated pricing** on avocados, lemons, Brussels sprouts, broccoli, chili peppers, asparagus, onions, and pineapples despite plentiful summer production across many other categories.

### 🍎 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 slowly improving; sizing becoming more consistent but supplies remain below demand |
| Bananas ●             | Stable imports                               | Excellent color, quality, and availability                                                           |
| Grapefruit ●          | Moderate supply                              | Larger sizes remain somewhat limited                                                                 |
| Limes ●               | Good supply; steady pricing                  | Excellent quality; 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; pricing continues easing | New fields showing improved quality with reduced insect pressure                                     |
| Honeydew ●            | Good supply                                  | Excellent sizing and sugar levels continue improving                                                 |
| Watermelon ●          | Strong domestic supply                       | Outstanding quality and plentiful availability                                                       |

| Item      |   | Current Supply & Pricing | Quality & Notes                                  |
|-----------|---|--------------------------|--------------------------------------------------|
| Pineapple | ● | Tight supply persists    | Flexibility on sizes continues to be recommended |
| Grapes    | ● | Strong domestic supply   | Excellent sizing, color, and eating quality      |
| Mangoes   | ● | Good supply              | Peak summer availability with excellent flavor   |
| Papaya    | ● | Steady supply            | Occasional softness still reported               |
| Kiwi      | ● | Strong supply            | Excellent firmness and overall quality           |

#### Vegetables, Herbs, Greens & Others

| Item                          |   | Supply / Market Direction         | Quality & Issues                                                                             |
|-------------------------------|---|-----------------------------------|----------------------------------------------------------------------------------------------|
| Asparagus                     | ● | Tight supplies continue           | Thin sizing and occasional quality concerns persist                                          |
| Bell Peppers                  | ● | Good supply                       | California production remains strong with excellent quality                                  |
| Chili Peppers                 | ● | Very tight supply                 | Elevated pricing continues with mixed sizing and limited availability                        |
| Broccoli                      | ● | Tight supplies; elevated markets  | Disease pressure and lighter field yields continue                                           |
| Cauliflower                   | ● | Stable supply                     | Smaller heads remain common but quality improving                                            |
| Brussels Sprouts              | ● | Tight supply                      | Seasonal transition continues limiting harvest volume                                        |
| Celery                        | ● | Moderate supply                   | Minor fringe burn occasionally reported                                                      |
| Carrots                       | ● | Strong supply                     | Excellent quality and consistent 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 continue providing abundant availability                |
| Green Beans                   | ● | Improving supply                  | Markets beginning to soften as domestic production expands                                   |
| Cucumbers                     | ● | Good supply                       | Strong domestic and Mexican production supports stable markets                               |
| Green Onions                  | ● | Slightly tight                    | Minor tip burn continues but supplies improving                                              |
| Mushrooms                     | ● | Steady supply                     | Consistent sizing and excellent quality                                                      |
| Tomatillos                    | ● | Good supply                       | Excellent availability and quality                                                           |
| Onions                        | ● | Seasonal transition continues     | New crop increasing gradually, but small sizes remain limited                                |

| Item       | Supply / Market Direction | Quality & Issues                                                   |
|------------|---------------------------|--------------------------------------------------------------------|
| Potatoes ● | Prices slightly elevated  | Storage crop bruising continues creating isolated quality concerns |
| Squash ●   | Good supply               | Strong production with only minor cosmetic scarring                |
| Eggplant ● | Good supply               | Excellent California quality                                       |
| Corn ●     | Good supply               | Excellent quality and consistent availability                      |

### Berries

#### Strawberries ●

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

#### Raspberries ●

- Supplies remain limited
- Delicate condition continues shortening shelf life
- Markets remain firm

#### Blueberries ●

- Pacific Northwest production reaches seasonal peak
- Excellent quality and plentiful availability
- Favorable markets expected to continue

#### Blackberries ●

- Moderate supply
- Occasional softness and red-cell issues persist
- Quality continues gradual improvement with newer harvests

### Looking Ahead

- ● **Lettuce markets are expected to remain the most volatile produce category** as Salinas disease pressure continues restricting production into early August.
- ● **Avocado supplies should gradually improve**, but elevated pricing is expected to continue until harvest volumes increase more substantially.
- ● **Tomatoes should remain one of the strongest value categories**, supported by abundant production from California, the Eastern U.S., and Mexico.
- ● **Chili peppers remain among the most volatile vegetable markets**, with elevated pricing and tight supplies expected to continue.
- ● **Broccoli and Brussels sprouts are expected to remain firm** as seasonal production transitions continue limiting supplies.
- ● **Pineapple supplies are expected to remain constrained**, with little meaningful short-term market relief anticipated.
- ● **Cucumbers, carrots, grapes, bell peppers, squash, sweet corn, mushrooms, eggplant, tomatillos, and watermelons** should continue offering stable pricing and excellent availability.

-  **Green bean markets should continue improving** as domestic summer production expands and pricing gradually eases.
-  **Blueberries should remain abundant** as Pacific Northwest harvests continue at seasonal peak.
-  **California strawberries are expected to maintain excellent quality and stable supplies** under favorable coastal growing conditions.