



VINYARD

The Weekly Vine – Produce Market Update August 14 -20, 2026

Market Snapshot

- **Salinas Valley lettuce production remains the industry's primary concern.** INSV, mildew, soil-borne diseases, tip burn, reduced acreage, and persistent light weights continue limiting harvest volume. While overall demand has softened slightly compared to early summer, supplies remain well below seasonal norms and periodic prorates are still expected through late August.
- **California summer vegetable production remains at seasonal peak.** Tomatoes, cucumbers, bell peppers, squash, eggplant, sweet corn, green beans, melons, and specialty vegetables continue producing abundant supplies with excellent quality and competitive pricing.
- **Mexico continues providing dependable import volume** across tomatoes, peppers, cucumbers, avocados, limes, grapes, mangoes, and tropical fruit, helping stabilize North American supplies despite isolated regional shortages.
- **Seasonal transitions continue affecting several key commodities.** Lemons, avocados, asparagus, Brussels sprouts, onions, pineapples, chili peppers, and some leafy greens remain the primary items experiencing tighter supplies and elevated pricing, while most summer commodities remain plentiful.

🍎 Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples ●	Strong supply; stable pricing	New crop & excellent quality across all major varieties
Avocados ●	Tight supply; elevated markets continue	Mexican supplies improving slowly, but USDA inspection disruptions and harvest timing continue limiting availability
Bananas ●	Stable imports	Excellent color, quality, and availability
Grapefruit ●	Moderate supply	Larger sizes remain somewhat limited
Limes ●	Good supply; steady pricing	Excellent quality; 175–230 count fruit supplies tightened
Oranges (Valencias) ●	Strong demand	Cosmetically – not pretty, but outstanding juice content and eating quality.
Lemons ●	Tight supply; elevated pricing	Crop transition continues; smaller sizes remain limited
Cantaloupe ●	Good supply	Peak California production providing excellent sizing and high sugar content

Item		Current Supply & Pricing	Quality & Notes
Honeydew	●	Good supply	Excellent sugar levels and consistent sizing
Watermelon	●	Strong domestic supply	Outstanding quality and plentiful availability – LOCAL melons starting!
Pineapple	●	Tight supply persists	Variable sizing continues; elevated markets remain
Grapes	●	Strong domestic supply	Excellent sizing, color, and eating quality
Mangoes	●	Peak summer supply	Excellent flavor, color, and availability
Papaya	●	Steady supply	Occasional softness continues on some arrivals
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 quality concerns persist
Bell Peppers	●	Good supply	California production remains strong with excellent quality
Chili Peppers	●	Tight supply	Elevated pricing continues; mixed sizing and limited availability
Broccoli	●	Moderate supplies	Disease pressure and lighter yields continue limiting harvests despite improving quality
Cauliflower	●	Stable supply	Smaller heads remain common, though quality continues improving
Brussels Sprouts	●	Tight supply	Seasonal transition and disease pressure continue limiting harvest volume
Celery	●	Moderate supply	Minor fringe burn occasionally reported; markets remain steady
Carrots	●	Strong supply	Excellent quality and consistent availability
Spinach / Tender Leaf / Herbs	●	Tight supply	Disease pressure, yellowing, and light weights continue affecting yields
Lettuce (All Types)	●	Demand continues exceeding supply	INSV, mildew, tip burn, reduced acreage, and light weights continue driving elevated markets
Tomatoes	●	Strong supply	California, Eastern U.S., and Mexico continue providing abundant availability
Green Beans	●	Good supply	Domestic production continues expanding with favorable markets

Item	Supply / Market Direction	Quality & Issues
Cucumbers ●	Good supply	Strong domestic and Mexican production supports stable pricing
Green Onions ●	Slightly tight	Minor tip burn persists, but supplies continue improving
Mushrooms ●	Steady supply	Consistent sizing and excellent quality
Tomatillos ●	Good supply	Excellent availability and quality
Onions ●	Seasonal transition continues	New crop volume increasing; pricing stabilizing, though smaller sizes remain limited
Potatoes ●	Slightly elevated pricing	Storage crop quality improving; isolated bruising remains
Squash ●	Good supply	Strong production with excellent overall quality
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 next week

Raspberries ●

- Supplies remain somewhat limited
- Delicate condition continues reducing shelf life
- Markets remain firm

Blueberries ●

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

Blackberries ●

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

Looking Ahead

- ● **Lettuce** will remain the most volatile produce category as Salinas Valley disease pressure continues restricting production through late August. Lower foodservice demand is helping prevent sharper price increases, but supplies remain tight.
- ● **Avocado** supplies should continue improving gradually, although elevated pricing is expected to persist while Mexican harvests and inspection activity normalize.

- ● **Tomatoes** should remain one of the best values in produce, supported by abundant production from California, the Eastern U.S., and Mexico.
- ● **Chili peppers** are expected to remain one of the tightest vegetable markets, with elevated pricing likely continuing into early September.
- ● **Brussels sprouts** may remain elevated as disease pressure and seasonal transitions continue limiting supplies.
- ● **Pineapple** availability is expected to remain constrained with little short-term market relief.
- ● **Cucumbers, carrots, grapes, bell peppers, squash, sweet corn, mushrooms, eggplant, tomatillos, green beans, melons, and watermelons** should continue offering excellent availability and stable pricing.
- ● **Cantaloupe and honeydew** should remain among the strongest fruit values as California production continues at seasonal peak.
- ● **Blueberries** are expected to remain abundant as Pacific Northwest harvests continue at peak production.
- ● **California strawberries** should continue delivering excellent quality, stable supplies, and favorable markets through the upcoming week.