



VINYARD

The Weekly Vine – Produce Market Update August 21 - 27, 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 modestly, supplies remain well below seasonal norms and periodic supply issues are expected to continue through the remainder of 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, favorable yields, 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 production challenges.
- Seasonal transitions continue affecting several key commodities. **Lemons, avocados, asparagus, Brussels sprouts, onions, pineapples, chili peppers, and tender leafy greens** remain the primary items experiencing tighter supplies and elevated pricing, while the majority of summer commodities remain readily available.

🍎 Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples ●	Strong supply; stable pricing	New crop harvest expanding with excellent quality and sizing across major varieties
Avocados ●	Tight supply; elevated markets continue	Mexican harvest gradually improving, but larger fruit and consistent arrivals remain limited
Bananas ●	Stable imports	Excellent color, quality, and availability
Grapefruit ●	Moderate supply	Larger sizes remain somewhat limited; quality remains very good
Limes ●	Good supply; steady pricing	Excellent quality; smaller 200–230 count fruit remains tighter than larger sizes
Oranges (Valencias) ●	Strong demand	Cosmetic appearance remains variable, but internal quality and juice content are outstanding
Lemons ●	Tight supply; elevated pricing	California crop transition continues; smaller sizes remain limited

Item		Current Supply & Pricing	Quality & Notes
Cantaloupe	●	Good supply	Peak California production continues delivering excellent sugar content and sizing
Honeydew	●	Good supply	Excellent eating quality with consistent sizing
Watermelon	●	Strong domestic supply	Outstanding quality with excellent availability; local production expanding
Pineapple	●	Tight supply persists	Variable sizing and shipping gaps continue supporting elevated markets
Grapes	●	Strong domestic supply	Excellent sizing, color, firmness, and flavor
Mangoes	●	Peak summer supply	Excellent flavor, color, and plentiful availability
Papaya	●	Steady supply	Occasional softness continues on some arrivals
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, especially imported product
Bell Peppers	●	Good supply	California production remains strong with excellent quality and color
Chili Peppers	●	Tight supply	Elevated pricing continues; mixed sizing and reduced harvest volume remain common
Broccoli	●	Moderate supplies	Disease pressure and lighter yields continue, though overall quality is improving
Cauliflower	●	Stable supply	Smaller heads remain common; 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 relatively steady
Carrots	●	Strong supply	Excellent quality and dependable availability
Spinach / Tender Leaf / Herbs	●	Tight supply	Disease pressure, yellowing, and light weights continue impacting 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

Item	Supply / Market Direction	Quality & Issues
Green Beans ●	Good supply	Domestic production continues expanding with favorable markets
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 continue recovering.
- ● 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 will likely 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.