



VINYARD

The Weekly Vine – Produce Market Forecast

October 24 - 30, 2026

Market Snapshot

- **Salinas Valley lettuce remains the industry's primary concern.** INSV, mildew, soil-borne diseases, tip burn, reduced acreage, and lighter harvest weights continue restricting supplies of Iceberg, Romaine, and Leaf lettuce. Availability remains well below seasonal norms, and elevated markets are expected to continue through the end of October.
- **California fall vegetable production continues to improve.** Broccoli, cauliflower, celery, and other cool-season vegetables are seeing better yields as temperatures moderate, although insect pressure continues to impact Brussels sprouts and some brassica crops.
- **Seasonal production transitions remain active across several commodities.** Tomatoes, strawberries, colored peppers, melons, citrus, and avocados continue shifting production regions, resulting in mixed availability, firm markets, and variable quality.

Commodity Availability Quality Forecast

		Excellent. New crop supplies remain plentiful with outstanding eating quality.
Apples	● Good	Larger sizes remain readily available while smaller foodservice sizes are beginning to tighten slightly.
Asparagus	● Fair	Good. Mexican supplies remain adequate, but pricing stays firm. Large sizes continue to be limited while standard sizes remain readily available.
Avocados	● Fair	Good. Mexican harvest continues transitioning into newer crop volume. Medium sizes remain most plentiful while large fruit continues to command premiums.
Bananas	● Excellent	Excellent. Stable imports continue with excellent quality and dependable availability.
Bell Peppers	● Fair	Good. Green pepper supplies remain adequate while colored peppers continue experiencing seasonal tightening during production transitions.
Blackberries	● Fair	Good. Mexican production continues expanding with improving availability and quality.
Blueberries	● Good	Very Good. Peru continues increasing shipments with consistent quality and dependable supplies, but prices are high.
Broccoli	● Fair	Good. Supplies continue improving with cooler weather, although insect pressure continues limiting overall production. Markets remain firm.
Brussels Sprouts	● Limited	Good. Supplies remain tight due to insect pressure and lighter yields. Elevated pricing is expected to continue.

Commodity	Availability	Quality Forecast
Cauliflower	● Fair-Good	Good. Additional acreage continues improving supplies with generally favorable quality.
Carrots	● Excellent	Excellent. California production remains strong with outstanding quality and consistent sizing.
Celery	● Good	Very Good. Supplies remain steady with favorable quality across all pack sizes.
Cilantro	● Good	Good. Stable production continues with dependable quality.
Grapefruit	● Good	Good. Florida production remains steady with improving internal quality.
Jalapeño Peppers	● Fair	Good. Mexican supplies remain adequate despite ongoing seasonal transitions.
Lemons	● Fair	Good. District transitions continue keeping supplies snug. Markets remain firm while quality is improving.
Limes	● Fair	Fair-Good. Small and medium sizes dominate production. Large fruit remains limited with occasional external appearance concerns.
Mushrooms	● Excellent	Excellent. Stable production with excellent quality and dependable supplies.
Onions	● Good	Very Good. Northwest storage onions continue shipping with excellent quality and stable markets.
Oranges	● Good	Good. Valencia supplies continue winding down while imports help maintain overall availability.
Pineapple	● Fair	Good. Overall supplies remain adequate, although larger sizes continue to be limited.
Potatoes	● Good	Excellent. Northwest harvest remains strong with outstanding quality. Larger carton counts remain somewhat tighter than smaller sizes.
Raspberries	● Good	Good. Mexican production continues improving with steady supplies.
Romaine Lettuce	● Limited	Fair-Good. Disease pressure continues reducing yields and carton weights. Elevated markets are expected to continue.
Iceberg Lettuce	● Limited	Fair-Good. Supplies remain well below seasonal averages with strong markets expected through late October.
Leaf Lettuce	● Limited	Fair-Good. Harvest volume remains restricted due to disease pressure and lighter weights.
Spinach	● Fair	Good. Supplies remain adequate with occasional quality variability.
Strawberries	● Fair	Good. California production continues transitioning while Mexican volume gradually increases. Markets remain firm.
Tomatoes	● Fair	Good. Seasonal transitions continue supporting stronger markets. Prices are high, but quality remains generally good despite tighter availability.

Commodity	Availability	Quality Forecast
Tomatillos	● Good	Good. Mexican supplies remain stable with dependable quality.
Watermelon	● Fair	Good. Domestic production continues winding down as imported supplies gradually increase.
Yellow Squash	● Good	Good. Supplies remain adequate with favorable quality from multiple growing regions.
Zucchini Squash	● Good	Good. Stable production continues with consistent quality and improving market conditions.

Overall Market Outlook

- **Highest Risk:** Iceberg Lettuce, Romaine Lettuce, Leaf Lettuce
- **Elevated Concern:** Brussels Sprouts
- **Watching Closely:** Tomatoes, Strawberries, Colored Bell Peppers, Lemons, Limes, Asparagus, Avocados
- **Most Stable Categories:** Apples, Bananas, Carrots, Celery, Potatoes, Mushrooms, Onions, Blueberries

Market Summary

Lettuce continues to be the primary challenge, with Salinas Valley disease pressure and reduced harvest volumes keeping Iceberg, Romaine, and Leaf markets elevated. Most hard vegetables, root crops, potatoes, onions, apples, mushrooms, and tropical fruit remain well supplied with excellent quality. Seasonal production transitions continue to create tighter availability and firmer pricing for tomatoes, strawberries, colored bell peppers, citrus, avocados, and melons.