

ArrowStream January 13, 2025

## Produce

The tail end of 2024 went as expected for most of the major produce items save for avocados. 24-count iceberg lettuce has settled into the \$10 to \$15/carton range following a volatile Q4. We shouldn't see too much movement here until March at the earliest. After that, there tends to be at least one supply gap in the spring that sends prices shooting higher. 25 lb. large roma tomatoes fell 14% w/w between the end of 2024 and beginning of 2025. We can probably look forward to similar levels of weakness stretching at least through the end of the month if not the end of Q1. 50 lb. yellow onions are still holding firm at \$12/sack, but we should see some strength starting soon. 48-count hass avocados managed to climb 10% w/w to start off the new year, running contrary to our hopes of some weakness in January. There's still a chance prices could come down this month, but it's looking increasingly likely that we won't see any kind of notable weakness until after April. Price bases noted below.

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Red Peppers (g 15 lb case)SteadyAvailableLowerceberg Lettuce (24 ct)SteadySteady-AvailableLowerceberg Lettuce (24 ct) TermIncreasingSteady-AvailableHighercend Lettuce (24 ct)IncreasingSteady-AvailableHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherResculin Mix (3 lb) TermIncreasingAvailableHigherSteadyAvailableHigherSteadyAvailableHigherSteady I/2 bushel)SteadyAvailableLowerSteadySteadyAvailableLowerSteadySteadyAvailableLowerSteadySteadyShortLowerSpinach (flat 24)SteadyShortHigherCucumbers (bushel)DecreasingAvailableHigherSpinach (flat 24)SteadyShortHigherCucumbers (bushel)DecreasingAvailableHigherSteadyShortHigherSteadySteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShort<	Roma Tomatoes (xlg case)	Decreasing	Steady-Available	Lower
Red Peppers (g 15 lb case)SteadyAvailableLowerceberg Lettuce (24 ct)SteadySteady-AvailableLowerceberg Lettuce (24 ct) TermIncreasingSteady-AvailableHighercend Lettuce (24 ct)IncreasingSteady-AvailableHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherResculin Mix (3 lb) TermIncreasingAvailableHigherSteadyAvailableHigherSteadyAvailableHigherSteady I/2 bushel)SteadyAvailableLowerSteadySteadyAvailableLowerSteadySteadyAvailableLowerSteadySteadyShortLowerSpinach (flat 24)SteadyShortHigherCucumbers (bushel)DecreasingAvailableHigherSpinach (flat 24)SteadyShortHigherCucumbers (bushel)DecreasingAvailableHigherSteadyShortHigherSteadySteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShortHigherSteadyShort<	Green Peppers (lg case)	Decreasing	Available	Lower
ceberg Lettuce (24 ct)IncreasingSteady-AvailableHigherLeaf Lettuce (24 ct)IncreasingSteady-AvailableHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherMesculin Mix (3 lb) TermIncreasingAvailableHigherSoccoli (14 ct)DecreasingAvailableHigherSquash (1/2 bushel)SteadyAvailableLowerZucchini (1/2 bushel)IncreasingSteady-AvailableLowerSteadySteadyShortLowerZucchini (1/2 bushel)SteadyShortHigherSteadyShortLowerLowerZucchini (1/2 bushel)SteadyShortHigherSteadyShortLowerLowerZucchini (1/2 bushel)SteadyShortHigherSteadyShortHigherSteadyShortKushrooms (10 lb Ig) TermSteadyAvailableLowerVickles (200-300 ct) TermSteadyShortHigherSteadyShortHigherHigherVickles (200-300 ct) TermSteadyShortHigherSteadyShortHigherHigherSteadySteadyShortHigher	Red Peppers (lg 15 lb case)	Steady	Available	Lower
Leaf Lettuce (24 ct)IncreasingSteadyHigherRomaine Lettuce (24 ct)IncreasingSteady-AvailableHigherMesculin Mix (3 lb) TermIncreasingAvailableHigherBroccoli (14 ct)DecreasingAvailableHigherSquash (1/2 bushel)SteadyAvailableLowerCarcchin (1/2 bushel)IncreasingSteady-AvailableLowerCarcchin (1/2 bushel)IncreasingSteady-AvailableLowerSteadySteadyShortLowerSpinach (flat 24)SteadyShortHigherCucumbers (bushel)SteadyAvailableHigherSteadyAvailableLowerSteadyShortHigherSteadyShortHigherSteadyShortHigherYushroons (10 lb 1g) TermSteadyShortHigherYickles (200-300 ct) TermSteadyShortHigherSteadyShortHigherHigherYickles (200-300 ct) TermSteadyShortHigher	Iceberg Lettuce (24 ct)	Steady	Steady-Available	Lower
Romaine Lettuce (24 ct)IncreasingSteady-AvailableHigherMesculin Mix (3 lb) TermIncreasingAvailableHigherBrocoli (14 ct)DecreasingAvailableHigherSquash (1/2 bushel)SteadyAvailableLowerZuechini (1/2 bushel)IncreasingSteady-AvailableLowerGreen Beans (bushel)SteadyShortLowerSpinach (flat 24)SteadyShortHigherVushrooms (10 lb [) TermSteadyAvailableHigherCucumbers (bushel)DecreasingAvailableLowerSteady 0.00 ct) TermSteadyShortHigherAsparagus (sm)SteadyShortHigher	Iceberg Lettuce (24 ct) Term	Increasing	Steady-Available	Higher
Mesculin Mix (3 lb) Term Increasing Available Higher   Sroccoli (14 ct) Decreasing Available Higher   Squash (1/2 bushel) Steady Available Lower   Zucchini (1/2 bushel) Increasing Steady-Available Lower   Zucchini (1/2 bushel) Increasing Steady-Available Lower   Zucchini (1/2 bushel) Steady Short Lower   Spinach (flat 24) Steady Short Higher   Queshinous (10 lb [g) Term Steady Available Higher   Cucumbers (bushel) Decreasing Available Lower   Vickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Leaf Lettuce (24 ct)	Increasing	Steady	Higher
Brocoli (14 ct)DecreasingAvailableHigherSquash (1/2 bushel)SteadyAvailableLowerZucchini (1/2 bushel)IncreasingSteady-AvailableLowerZucchini (1/2 bushel)IncreasingSteady-AvailableLowerSpinach (flat 24)SteadyShortLowerWushrooms (10 lb lg) TermSteadyAvailableHigherZuccumbers (bushel)DecreasingAvailableLowerPickles (200-300 ct) TermSteadyShortHigherAsparagus (sm)SteadyShortHigher	Romaine Lettuce (24 ct)	Increasing	Steady-Available	Higher
Squash (1/2 bushel) Steady Available Lower   Zacchini (1/2 bushel) Increasing Steady-Available Lower   Zarcen Beans (bushel) Steady Short Lower   Spinach (flat 24) Steady Short Higher   Jusher (flat 24) Steady Available Higher   Zuccumbers (bushel) Steady Available Higher   Zuccumbers (bushel) Decreasing Available Lower   Pickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Mesculin Mix (3 lb) Term	Increasing	Available	Higher
Jucchini (1/2 bushel) Increasing Steady-Available Lower   Green Beans (bushel) Steady Short Lower   spinach (flat 24) Steady Short Higher   ushrooms (10 blg) Term Steady Available Higher   cucumbers (bushel) Decreasing Available Lower   Pickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Broccoli (14 ct)	Decreasing	Available	Higher
Green Beans (bushel) Steady Short Lower   Spinach (flat 24) Steady Short Higher   Mushrooms (10 lb lg) Term Steady Available Higher   Cucumbers (bushel) Decreasing Available Lower   Vickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Squash (1/2 bushel)	Steady	Available	Lower
Spinach (flat 24)SteadyShortHigherMushrooms (10 lb lg) TermSteadyAvailableHigherCucumbers (bushel)DecreasingAvailableLowerPickles (200-300 ct) TermSteadyShortHigherAsparagus (sm)SteadyShortHigher	Zucchini (1/2 bushel)	Increasing	Steady-Available	Lower
Mushrooms (10 lb lg) Term Steady Available Higher   Cucumbers (bushel) Decreasing Available Lower   Pickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Green Beans (bushel)	Steady	Short	Lower
Curumbers (bushel) Decreasing Available Lower   Pickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Spinach (flat 24)	Steady	Short	Higher
Pickles (200-300 ct) Term Steady Short Higher   Asparagus (sm) Steady Short Higher	Mushrooms (10 lb lg) Term	Steady	Available	Higher
Asparagus (sm) Steady Short Higher	Cucumbers (bushel)	Decreasing	Available	Lower
	Pickles (200-300 ct) Term	Steady	Short	Higher
Freight (truck CA-Cty Av) Steady Short Higher	Asparagus (sm)	Steady	Short	Higher
	Freight (truck CA-Cty Av)	Steady	Short	Higher

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