

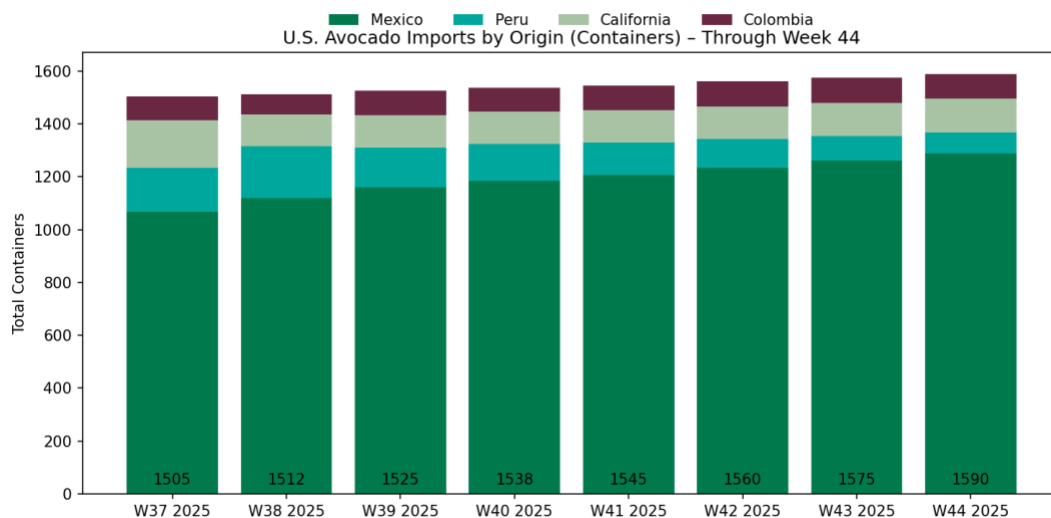
US Hass Avocado Market

Market Snapshot

Supply Origin

- In Week 44, the U.S. Hass avocado market remains **stable, well supplied, and clearly Mexico-driven**. Mexican harvest volume is strong and consistent, with steady crossings through Texas and key coastal ports providing ample coverage on 48s, 60s, and 70s. Mid-size fruit continues to trade at **soft but orderly levels**, giving buyers continued room to promote without putting upward pressure on the market. Larger fruit (32s–40s) is still comparatively tighter, holding a firmer tone and maintaining a premium as demand from certain retail and foodservice specs concentrates on those bigger counts. Peru and California are fully out of the commercial mix at this point, and Colombia's contribution remains modest but steady, mainly reinforcing mid-size availability on the East Coast. Movement at major terminals is solid with no notable freight or port disruptions. Overall, Week 44 presents a **calm, buyer-friendly environment**, defined by predictable Mexican volume, comfortable availability, and stable pricing on mid-sizes.

Supply Origin & Changes



Overall import tone – Stable and fully covered

- Total arrivals broadly in line with recent weeks.
- Mids remain soft/stable, large fruit firm.
- No major logistics or port issues reported.



Supply Origin

Buyer Action Plan

Mexico – High volume, firmly in control

- Likely **85–90%+ of total U.S. supply** (directional).
- Fall harvest in full swing, steady flow through Texas and West Coast ports.
- Deep availability on 48s, 60s, 70s; comparatively lighter but consistent 32–40s.
- Quality and pack consistency generally strong.

Colombia – Stable supplemental origin

- Single-digit share of total supply.
- Helpful mid-size support into East Coast and some Gulf ports.
- Treated as supportive, not primary, volume.

Peru – Fully exited

- No commercial arrivals for Week 44.
- Not available for promos, programs, or reliable spot coverage.

California – Season finished

- Domestic crop essentially done.
- Any remaining fruit is local/residual and not market-moving.

Buyer Action Plan

- **Keep pushing 48s & 60s as your value and promo workhorses.**

Pricing on mid-sizes is still very favorable and has settled into a predictable range. This is a strong week for price-forward ads, foodservice menu features, or building a bit of extra coverage where you have reliable pull-through.

- **Build all core and promotional programs on Mexico.**

Mexico is the only origin with the volume, consistency, and full size spread to support real programs. All multi-week plans for November should assume Mexico as the backbone origin.

- **Treat Peru and California as non-factors.**

Both are fully off the table now. Don't base any planning, even short-term, on their availability. Any stray lots should be treated as one-off opportunities, not structural supply.

- **Use Colombian fruit as a flexible East Coast mid-size supplement.**

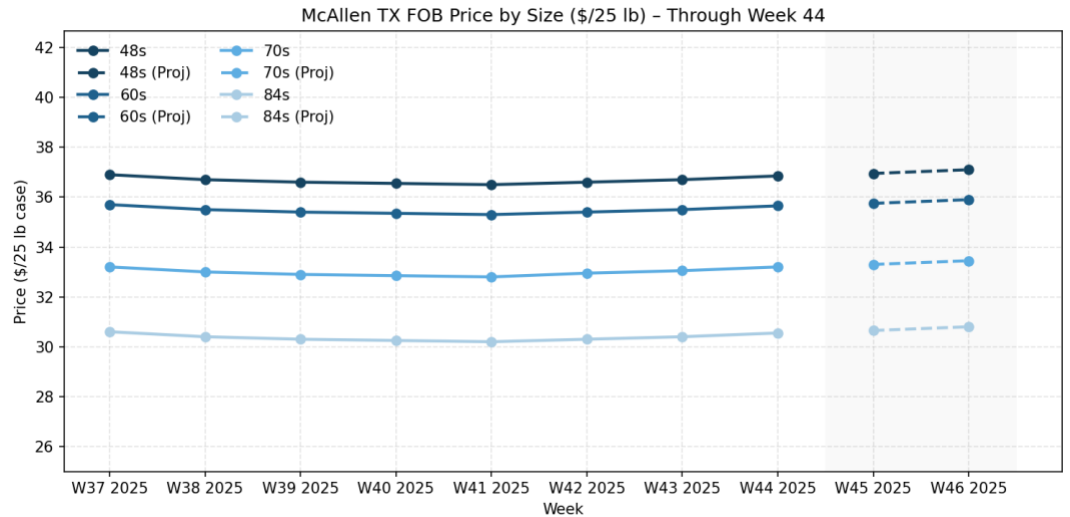
Colombian arrivals can help fine-tune coverage, especially on 48s and 60s into Eastern ports. This is useful for smoothing minor gaps or diversifying slightly without over-extending on additional Mexican volume.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 44 closes with a **calm, Mexico-anchored market** that continues to favor buyers focused on mid-size fruit. Strong and consistent Mexican harvest volume underpins the entire supply picture, while Peru and California are fully out of the mix and Colombia plays a reliable but clearly secondary role, especially on the East Coast. The main takeaways this week are: there is still meaningful value in 48s and 60s, all serious programs should be built around Mexican supply, and short, tactical promo windows remain the best way to stay aligned with Mexico's evolving size curve. Larger fruit stays comparatively tight and should be protected with a clear premium and tiered pricing. With logistics running smoothly and no major shocks on the horizon, Week 44 remains a predictable, buyer-friendly environment for strategic avocado purchasing.



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