

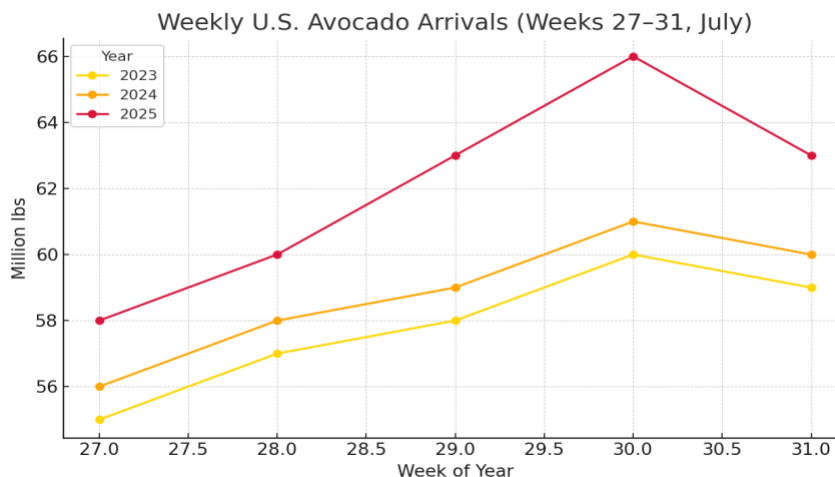


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US Hass Avocado Market

Market Snapshot

- In July, U.S. avocado imports hit a seasonal high, with Week 30 reaching 1,731 containers/trucks—the strongest weekly volume since mid-March. That represented an 8% week-over-week increase and a 6% year-over-year gain, showing both seasonal strength and underlying demand resilience. Mexico held the dominant position at 57%, with Peru (21%) and Colombia (7%) expanding their shares mid-month, reinforcing a diversified supply base. Retailers were able to lean on this abundant flow to maintain steady promotions, helping keep consumer demand engaged during the peak of summer. The consistent supply across multiple origins also provided buyers with confidence to plan promotions without fear of sudden gaps.



Supply Mix

- **Mexico:** Maintained the largest share of July imports, keeping shipments robust and dependable.
- **Peru:** Expanded its share mid-month, helping add much-needed volume and market flexibility.
- **California:** Provided limited but helpful regional volume to supplement imports when beneficial.
- **Colombia:** Remained a small contributor, adding backup diversification to sourcing.



Plans & Estimates

Price Picture

- FOB prices trended stable throughout July, supported by the heavy inflows from Mexico and Peru that prevented sharp spikes. While Peruvian fruit added downward pressure to balance pricing, stronger demand for medium-to-large fruit kept values from slipping too far. Retail advertised prices remained competitive, especially in bagged and multipack formats, which drew steady consumer interest. Promotions on larger sizes also helped move slower fruit, creating a balanced market where supply and demand stayed in alignment. Overall, the pricing environment allowed both suppliers and retailers to protect margins while keeping product accessible to shoppers.

Demand & Downstream Dynamics

- **Bagged and mid-size Hass formats** continued strong movement as consumer preferences favored convenience.
- **Larger, premium-sized fruit** required strategic promotional support to maintain velocity.
- **Retail turnover** remained steady, helped by value-driven presentation and consistent supply flows.

Final Take-Away

Take-away: July 2025 delivered a healthy peak in avocado arrivals, ensuring ample supply to cover strong mid-summer demand. The combination of Mexico's dominance and Peru's steady rise created a stable market that allowed pricing to hold firm. Bagged and mid-size fruit remained category leaders, while larger sizes benefitted from well-timed promotions that kept them moving. Overall, the month ended with strong fundamentals and positioned the market on solid footing heading into August. Looking ahead, the balance of abundant supply and stable demand suggests a smoother transition into late summer than in previous years.



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