

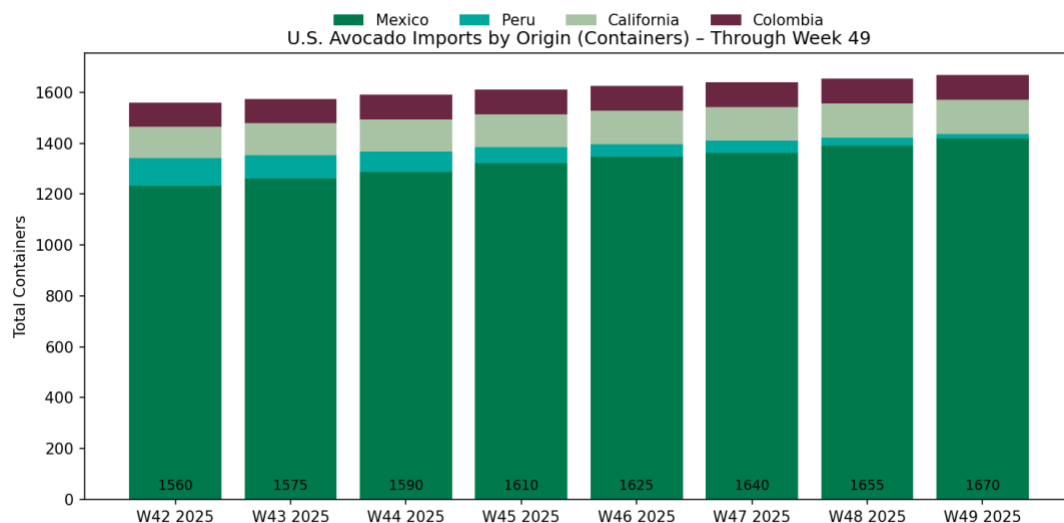
US Hass Avocado Market

Market Snapshot

Supply Origin

- In Week 49, the U.S. Hass avocado market continues to operate in a **stable, well-supplied, and Mexico-centered environment** as the industry moves deeper into December. Mexican harvest volume remains strong and consistent, with reliable crossings through Texas and coastal ports keeping 48s, 60s, and 70s readily available nationwide. Mid-size fruit pricing remains **soft but orderly**, allowing buyers to maintain promotional activity and solid coverage without creating upward pressure on the market. Larger sizes (32–40s) continue to trade at a firmer level, holding a premium due to comparatively tighter availability and steady demand from retail programs that favor larger fruit presentations. Peru and California remain fully absent from commercial supply, while Colombia continues to contribute modest but consistent volumes, primarily reinforcing mid-size availability on the East Coast. Terminal movement is steady and aligned with seasonal demand patterns, and logistics remain fluid with no major disruptions reported. Overall, Week 49 reflects a **predictable, slightly buyer-leaning market**, driven by dependable Mexican supply and continued value in mid-size fruit.

Supply Origin & Changes



Overall import tone – Stable and fully covered

- Total arrivals broadly consistent with Weeks 47–48.
- Mid-sizes remain soft/stable; large fruit firm and premium.
- No notable port, weather, or freight disruptions reported (directional).



Supply Origin

Buyer Action Plan

Mexico – Strong volume, overwhelmingly dominant

- Likely **around 90% of total U.S. supply** (directional).
- Harvest and crossings remain steady through Texas and West Coast ports.
- Deep availability on 48s, 60s, and 70s; 32–40s available but relatively tighter.
- Quality and pack consistency remain reliable across major exporters.

Colombia – Steady, secondary contributor

- Stable single-digit share of total imports.
- Useful mid-size support into East Coast and select Gulf ports.
- Treated as supplemental rather than primary supply.

Peru – Fully exited

- No commercial arrivals at this point in the season.
- Not available for programs, spots, or promotional planning.

California – Domestic season finished

- No meaningful contribution to national supply.
- Any remaining fruit is local or residual and not market-moving.

Buyer Action Plan

- **Continue to use 48s & 60s as the core volume and promotional drivers.**

Mid-size pricing remains attractive and predictable, making Week 49 well suited for sustained retail ads, foodservice features, and maintaining strong ripening coverage ahead of year-end demand.

- **Anchor all core programs and December planning on Mexico.**

Mexico remains the only origin with the volume, quality, and size range required to support consistent weekly specs. All meaningful short- and mid-term planning should assume Mexican supply as the backbone.

- **Use Colombian fruit tactically for East Coast mid-size reinforcement.**

Colombian arrivals can help fine-tune 48/60 availability into Eastern and some Gulf ports, offering limited diversification and flexibility without overcommitting on additional Mexican loads.

- **Protect margin on larger sizes (32–40s) with clear tiered pricing.**

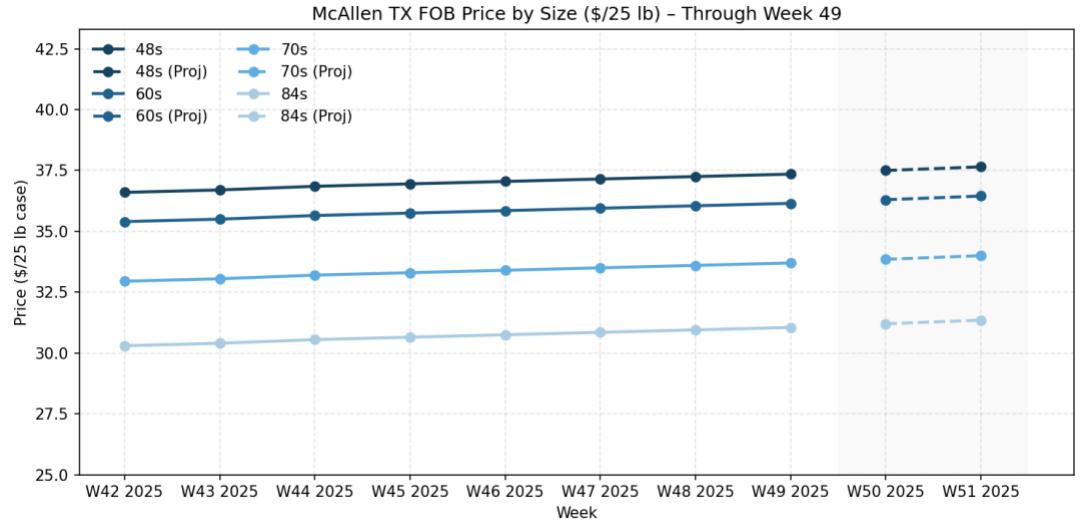
Larger fruit continues to run tighter and should maintain a defined premium over mid-sizes. Structured tiered pricing helps preserve margin while allowing mids to carry volume.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 49 closes with a **stable, Mexico-dominated market** that continues to favor buyers focused on mid-size fruit while maintaining firm premiums on larger sizes. Mexican harvest volume and quality remain dependable as year-end demand approaches, providing a consistent foundation for both program and promotional activity. Peru and California remain fully absent from the supply mix, and Colombia continues to play a modest but reliable role as a mid-size supplement, particularly on the East Coast. The key takeaways this week are the sustained value and stability in 48s and 60s, the necessity of anchoring all meaningful programs in Mexican supply, and the importance of keeping promotions short and tactical as size curves evolve. Larger fruit remains comparatively tight and should be protected with tiered pricing and clear premiums. With logistics functioning normally and no major disruptions in sight, Week 49 offers another predictable, buyer-friendly environment for strategic avocado purchasing.



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