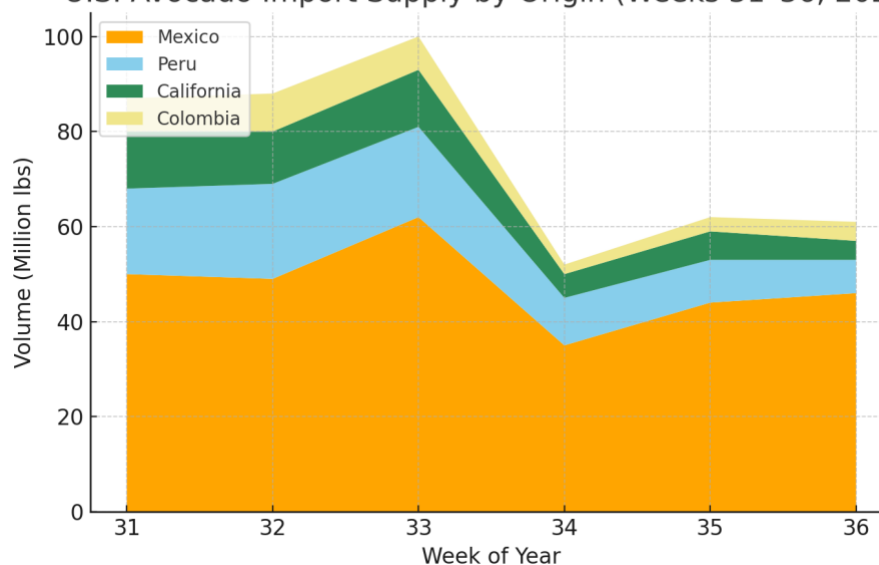


US Hass Avocado Market

Market Snapshot

- During Week 36, the U.S. Hass avocado market experienced a relatively balanced tone, with pricing stability holding across most sizes despite shifting dynamics in global supply. Mexico continued to anchor the market, providing steady volumes that kept the pipeline flowing, though some buyers noted tightening freight availability out of Texas which added modest cost pressure on delivered loads. Peru's participation was still visible on the East Coast, but volumes are tapering sharply as their season winds down, gradually reducing alternative sourcing options. California's crop is nearly complete, which has further reinforced Mexico's role as the primary driver of supply, especially in central and western U.S. markets. Colombian fruit added some supplemental coverage in the East, though volumes remained modest and more of a secondary factor than a market mover. On the demand side, retail activity remained consistent, with bag programs sustaining strong pull-on smaller fruit, while foodservice buyers continued to focus on 48s and 60s for menu stability. The overall market sentiment was steady to slightly firm, with forward buyers preparing for stronger reliance on Mexico heading into Q4.

U.S. Avocado Import Supply by Origin (Weeks 31-36, 2025)



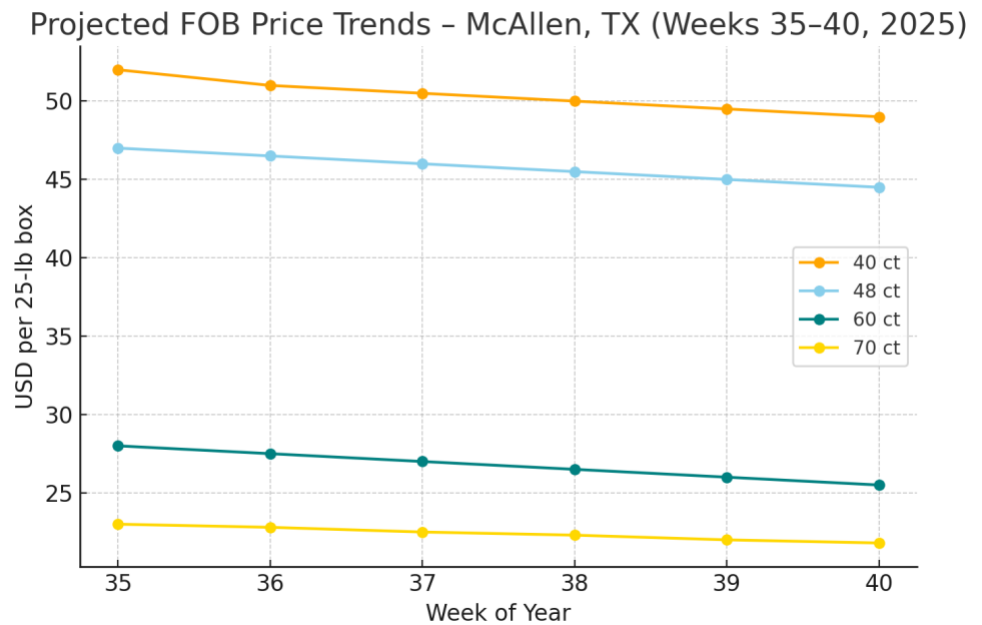


Plans & Estimates

Buyer Action Plan

- **Lock in forward contracts** for Mexican 48s and 60s as supply remains reliable and competitively priced.
- **Monitor East Coast arrivals** of late-season Peruvian fruit for value opportunities on mid-sized cartons.
- **Prepare for heavier Mexican dominance** in Q4 as California and Peru exit the market.

Future Estimated Curve McAllen TX



Contact Us

312 112th St S Suite A | Tacoma WA, 98444
 253-353-5529 | ethan@theandeanconnection.com
 Ethan Mayer – Executive Manager