

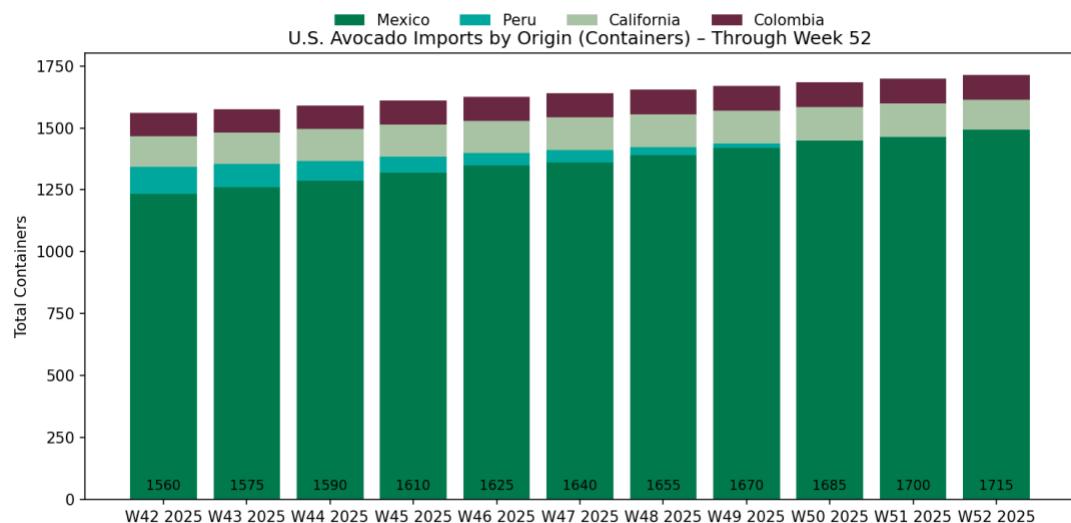
# US Hass Avocado Market

## Market Snapshot

## Supply Origin

- Week 52 marks the close of the calendar year with the U.S. Hass avocado market operating in a **quiet, transitional pattern** shaped by holiday slowdowns and consistent Mexican supply. Mexico continues to dominate total availability, providing reliable volumes across most sizes as crossings remain steady through Texas and coastal ports. Mid-size fruit (48s and 60s) remains the most available and competitively priced category, while larger sizes (32–40s) continue to hold firmer pricing due to tighter relative supply and selective demand. Peru and California remain fully absent from the commercial supply picture, simplifying the origin mix, while Colombia continues to play a modest supporting role, primarily reinforcing mid-size availability into East Coast markets. Movement through major terminals is slower than earlier in December, reflecting holiday closures, reduced labor schedules, and lighter foodservice demand. Overall, Week 52 presents a **stable but subdued market**, with predictable supply, limited volatility, and a clear shift from execution to positioning ahead of the new year.

## Supply Origin & Changes



Overall import tone – Stable and controlled

- Arrivals largely in line with Weeks 49–50.
- No major port, weather, or freight disruptions noted.
- Pricing structure unchanged: mids softer, large fruit firm.



Mexico – Sole primary driver

- Estimated ~90%+ of total U.S. supply (directional).
- Consistent harvest and border flow despite holiday staffing impacts.
- Strong availability on 48s and 60s; large fruit remains relatively tighter.

Supply Origin

Colombia – Small but steady

Buyer Action Plan

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- Single-digit share of total imports.
- Most relevant for mid-size support on the East Coast.
- Supplemental, not structural supply.

Peru – Fully exited

- No commercial arrivals.
- Not a factor in current or near-term planning.

California – Season closed

- Domestic production finished.
- No impact on national availability or pricing.

## Buyer Action Plan

- **Prioritize clean year-end execution over aggressive buying.**

Week 52 is about finishing the year clean. Buyers should focus on matching arrivals tightly to near-term movement and avoid carrying excess inventory into early January.

- **Use mid-sizes to maintain flexibility through the holiday lull.**

48s and 60s remain the most forgiving sizes from both a cost and movement perspective, making them ideal for navigating reduced holiday-week demand.

- **Be conservative with large fruit commitments.**

Larger sizes continue to carry a premium and may move slower during the holiday slowdown. Purchase only what is needed to meet committed specs.

- **Manage ripening schedules tightly.**

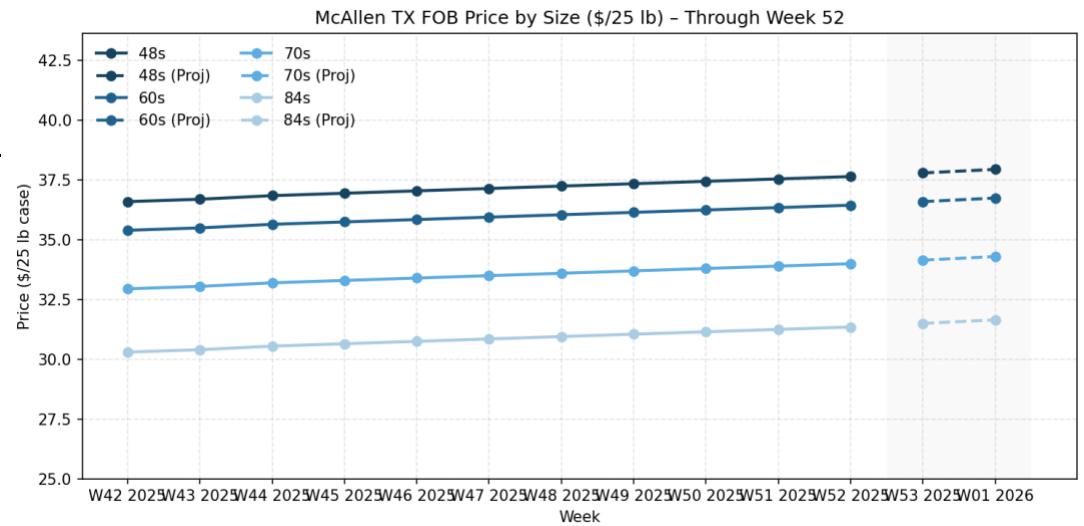
Slower turns increase shrink risk. Buyers should shorten ripening windows, reduce overlap, and coordinate closely with receivers to avoid soft fruit building up over the holiday period.



## Future Estimated Curve McAllen TX

### Estimated Curve

### Conclusion



### Final Thoughts

Week 52 closes the year with a **calm, predictable market environment** defined by steady Mexican supply and a temporary holiday-driven slowdown in demand. The absence of Peru and California simplifies sourcing decisions, while Colombia continues to provide modest but reliable mid-size support. The most important takeaways this week are the importance of disciplined inventory management, the continued usefulness of mid-sizes for flexibility, and the value of using this period to prepare for early Q1 rather than chase late-year volume. Larger fruit remains comparatively tight and should be purchased selectively, while ripening and shrink management deserve extra attention during the slower holiday window. With no immediate supply disruptions visible, Week 52 serves as a clean handoff from year-end execution to thoughtful positioning for the start of the new year.



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