

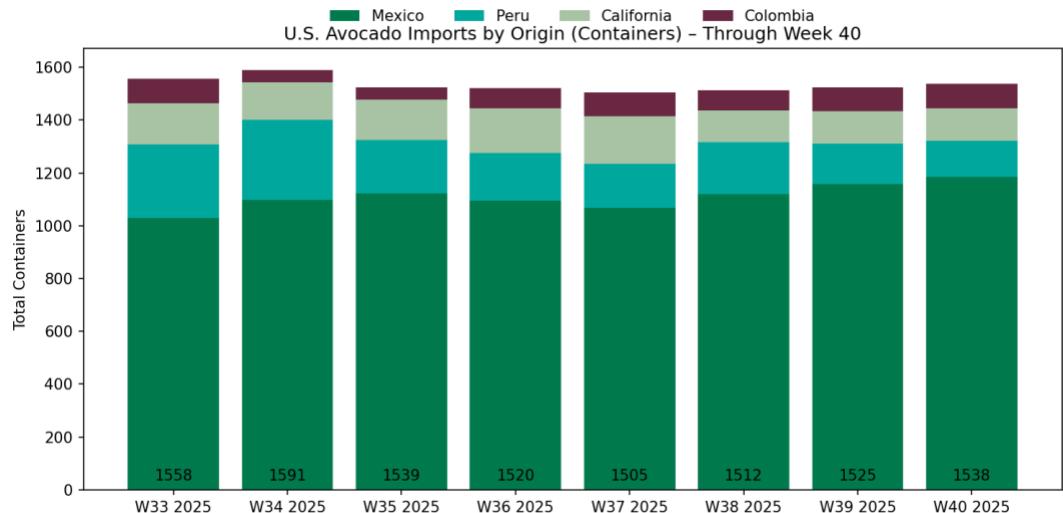
US Hass Avocado Market

Market Snapshot

Supply Origin

- Week 40 continues the theme of a **well-supplied and steady avocado market**, with pricing on mid-sizes remaining soft and promotional opportunities staying attractive for buyers across retail and foodservice. Mexico again increased its presence this week as harvest conditions remained favorable and crossings through Texas held consistent. This helped more than compensate for the near-complete exit of Peru and the final tapering of California, both of which now contribute only marginal volumes. Mid-size fruit (48s and 60s) remains the most aggressively priced category, with FOBs holding at favorable levels and still tracking noticeably below last year. Larger fruit shows a slightly firmer tone due to lighter availability on 32–40s, but price levels remain stable without major volatility. Movement across major U.S. terminals is strong, supported by steady demand and reliable ripening supply. Overall, Week 40 maintains a **steady-to-soft tone**, shaped almost entirely by Mexico's dominance and the consistency of Colombian support on the East Coast.

Supply Origin & Changes



Overall Import Tone – Stable, fully covered

- Total arrivals steady versus Week 39, keeping markets balanced.
- Mid-size pressure remains; large fruit shows mild firmness.
- Logistics and freight flowing normally.



Supply Origin

Buyer Action Plan

Mexico – Slight increase, firmly dominant

- Volume continues rising modestly as fall harvest accelerates.
- Holds **~80%+ of total supply** (directional estimate).
- Strong availability of 48s, 60s, and 70s; stable quality and pack consistency.

Peru – Essentially finished

- Only trace volumes appearing at select East Coast ports.
- Not suitable for programs or promotional ads.
- Fruit is residual and inconsistent.

California (Domestic) – Season concluded

- Near-zero impact on national supply.
- Remaining fruit tied to fixed local programs.
- No measurable influence on price.

Colombia – Consistent support, especially mids

- Continues providing **single-digit but reliable** weekly volume.
- Useful for mid-size programs, particularly on the East Coast.
- Improving quality consistency week-to-week.

Buyer Action Plan

- **Capitalize on ongoing value in mid-sizes (48s & 60s).**

Mid-sizes remain the most competitively priced category for Week 40 and continue presenting excellent promotional opportunities. Buyers with ripening programs or high-turn retail movement should lean heavily here.

- **Base all core supply programs on Mexico.**

With Mexico supplying the vast majority of the market and showing excellent size distribution, it remains the only dependable foundation for consistent weekly specs. All long-term planning should assume Mexico as the anchor origin.

- **Avoid reliance on Peru or California for any promotional coverage.**

Both origins are effectively out of the market. Use any remaining fruit only as opportunistic add-ons when the specs match.

- **Use Colombian fruit as a strategic supplement for mid-size fills.**

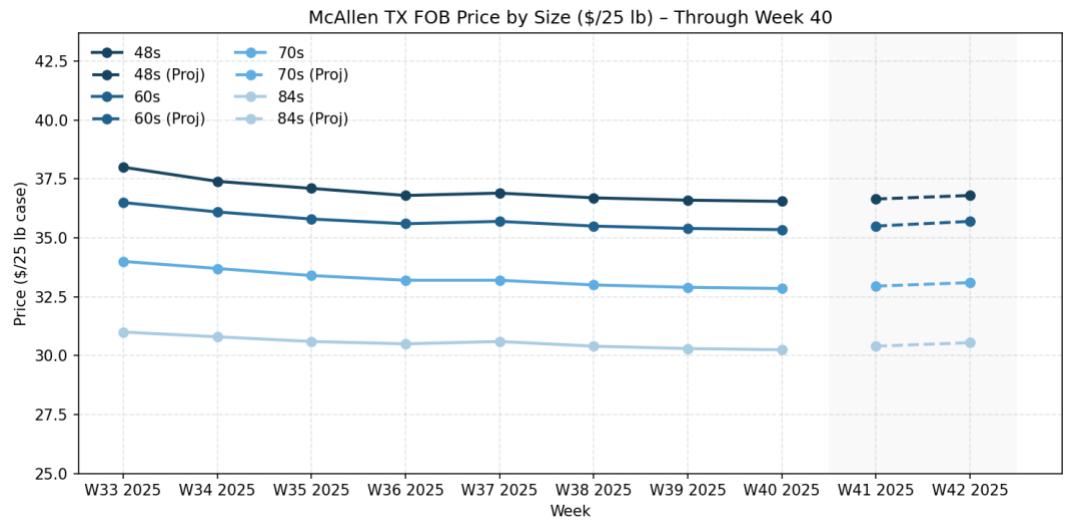
Colombian arrivals remain steady and useful for filling gaps on 48s/60s. This is especially valuable for East Coast buyers seeking flexible coverage without overextending on Mexican volume.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Conclusion

Week 40 ends with a market that continues to lean decidedly in favor of buyers, especially those focused on 48s and 60s. Mexico's increasing dominance ensures steady volume and reliable sizing, while the near-total exit of Peru and California simplifies the origin mix and makes planning more predictable. Colombia remains a helpful supplemental origin, particularly for buyers on the East Coast looking to reinforce mid-size programs. Larger fruit remains slightly tighter, reinforcing the importance of tiered pricing strategies and disciplined program structure. The key takeaways this week are the sustained value in mid-sizes, the need to anchor programs firmly in Mexico, and the advantages of shorter promotional windows as Mexico's fall harvest patterns evolve. With no significant supply disruptions on the horizon, Week 40 provides a stable and opportunity-rich environment for strategic buying.

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