

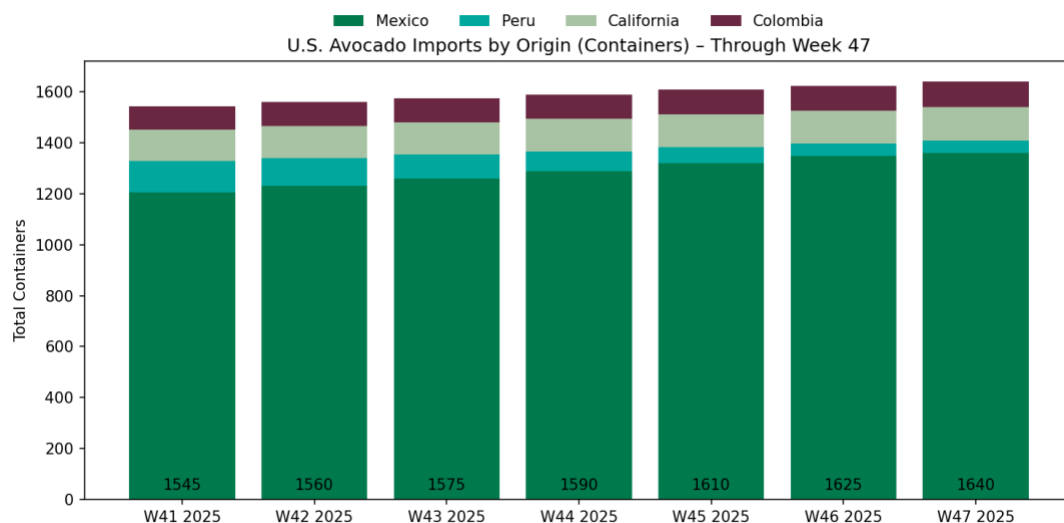
US Hass Avocado Market

Market Snapshot

Supply Origin

- In Week 47, the U.S. Hass avocado market remains **steady, well supplied, and firmly centered on Mexico**, with a familiar split between softer mid-size pricing and firmer large-fruit premiums. Mexican harvest volume continues at solid levels as the season moves toward the winter holidays, with consistent crossings through Texas and key coastal ports providing ample coverage on 48s, 60s, and 70s. Mid-size fruit pricing remains attractive and relatively stable versus recent weeks, giving retailers and foodservice buyers room to maintain or launch promotions without sparking major volatility. Larger sizes (32–40s) continue to run comparatively tighter and hold a premium as demand from certain retail specs and higher-end foodservice programs remains focused on bigger fruit. Peru and California are still absent from the commercial landscape, while Colombia maintains a modest but steady presence, primarily supporting mid-size supply into East Coast ports. Movement at major terminals is solid and in line with normal seasonal demand. Overall, Week 47 carries a **steady, slightly buyer-leaning tone**, driven by strong Mexican supply and persistent value in mid-sizes.

Supply Origin & Changes



Overall import tone – Stable and fully covered

- Total arrivals broadly in line with Weeks 45–46.
- Mid-sizes remain soft/stable, large fruit firm and premium.
- No major port, weather, or freight disruptions reported (directional).



Supply Origin

Buyer Action Plan

Mexico – Strong volume, overwhelmingly dominant

- Likely **around 90% of national supply** (directional).
- Harvest remains active with consistent crossings via Texas and West Coast gateways.
- Deep availability on 48s, 60s, 70s; 32–40s remain comparatively tighter but available.
- Quality and pack consistency remain reliable across major shippers.

Colombia – Steady, secondary contributor

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

Peru – Fully exited

- No commercial arrivals at this stage.
- Not available for programs, spots, or promos.

California – Domestic season finished

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

Buyer Action Plan

- **Continue to use 48s & 60s as your primary volume and promo engine.**

Mid-size pricing remains favorable and stable, making Week 47 a strong window for price-forward retail ads, menu features, and reinforcing coverage as holiday demand builds.

- **Base all significant programs and holiday-front planning on Mexico.**

Mexico is effectively the **only origin** with the size distribution, volume, and consistency required for reliable weekly specs. All meaningful multi-week or holiday-oriented planning should assume Mexican supply as the backbone.

- **Exclude Peru and California from forward planning assumptions.**

Both origins are fully out for this timeframe. Any isolated fruit should be treated as opportunistic only and never used to underpin ads or ongoing programs.

- **Use Colombian fruit tactically to support East Coast mid-size programs.**

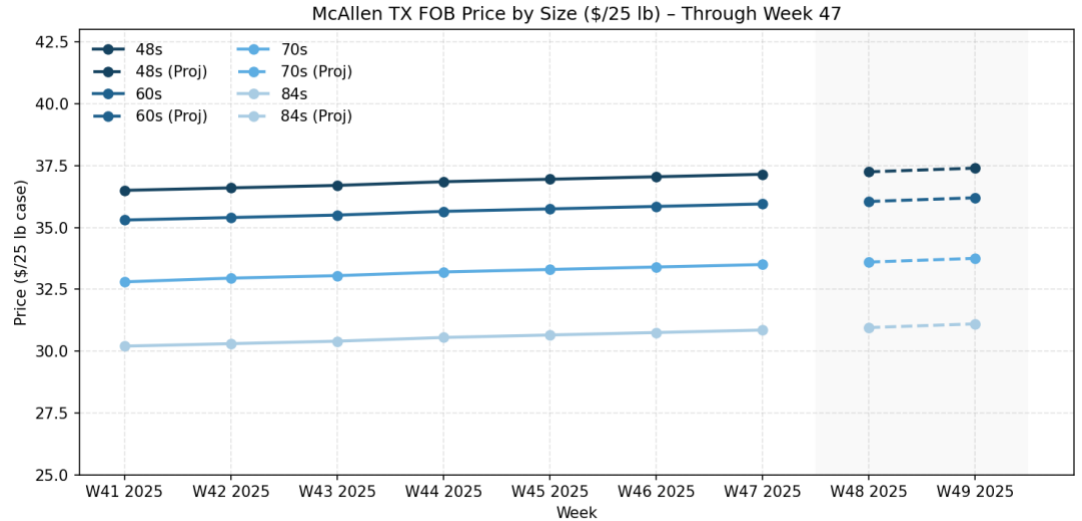
Colombian arrivals can help fine-tune 48/60 coverage into Eastern and some Gulf ports, adding flexibility or small diversification without overextending on additional Mexican loads.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 47 closes with a **stable, Mexico-driven market** that continues to favor buyers on mid-size fruit while preserving firm premiums on larger sizes. Mexican harvest volume and quality remain dependable as the industry approaches the heart of the holiday period, providing the consistency needed for both program and promotional planning. Peru and California remain fully absent, and Colombia continues to play a steady but clearly secondary role as a mid-size supplement into East Coast ports. The main takeaways this week are the ongoing value and stability in 48s and 60s, the necessity of building all meaningful programs around Mexico, and the benefit of short, tactical promo windows that track Mexico's evolving size curve. Larger fruit remains relatively tight and should be protected with tiered pricing and defined premiums. With logistics functioning normally and no major supply shocks on the radar, Week 47 offers another predictable, buyer-friendly environment for strategic avocado purchasing.



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