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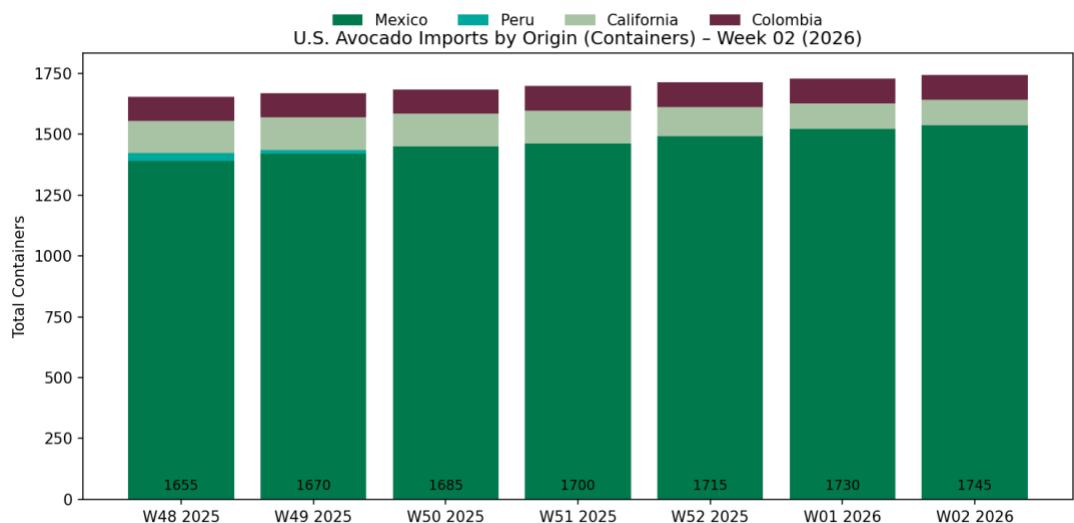
US Hass Avocado Market

Market Snapshot

Supply Origin

- Week 2 marks the first full operating week of the new year, with the U.S. Hass avocado market beginning to **transition from post-holiday reset into more normalized demand patterns**. Supply remains firmly anchored by **Mexico**, which continues to provide consistent volume across all major ports and size categories. Mid-size fruit (48s and 60s) remains the most available and competitively priced, supporting improved movement as retail and foodservice buyers return to regular ordering cycles. Larger sizes (32–40s) continue to trade at a firmer level, reflecting relatively tighter availability and selective demand tied to specific retail programs. **Peru** and **California** remain fully out of the supply picture, while **Colombia** continues to offer modest but reliable mid-size support, particularly into East Coast markets. Terminal movement is improving week over week, and logistics remain smooth with no notable disruptions. Overall, Week 2 reflects a **stable, early-Q1 market** where supply is predictable and demand is gradually rebuilding.

Supply Origin & Changes



Overall import tone – Stable with improving flow

- Arrivals consistent with Week 1, 2026.
- No material freight, port, or weather issues.
- Market tone driven by demand recovery rather than supply shifts.



Mexico – Clear backbone of supply

- Estimated **~90%+ of total U.S. availability** (directional).
- Consistent harvest and border crossings following the holiday period.
- Strong supply of 48s and 60s; large fruit remains comparatively tighter.

Supply Origin

Buyer Action Plan

Colombia – Stable secondary origin

- Single-digit share of imports.
- Most useful for mid-size reinforcement on the East Coast.
- Supportive rather than market-setting.

Peru – Out of season

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

California – Off-season

- Domestic production remains finished.
- No impact on national supply dynamics.

Buyer Action Plan

- **Use mid-sizes to reestablish predictable movement.**

48s and 60s remain the most efficient sizes for restarting flow, minimizing cost risk, and supporting ripening programs as throughput increases.

- **Avoid front-loading inventory early in Q1.**

While movement is improving, it is still early January. Maintaining flexibility allows buyers to adjust quickly if demand accelerates or stalls.

- **Tie large-fruit purchases to confirmed needs.**

Larger sizes remain premium-priced and tighter. Buyers should commit to 32s–40s only where there is clear retail or foodservice demand.

- **Use Colombian fruit as a smoothing mechanism, not a base.**

Colombian arrivals can help fine-tune mid-size availability, especially on the East Coast, but core programs should remain Mexico-centric.

- **Begin testing light promotions rather than full ads.**

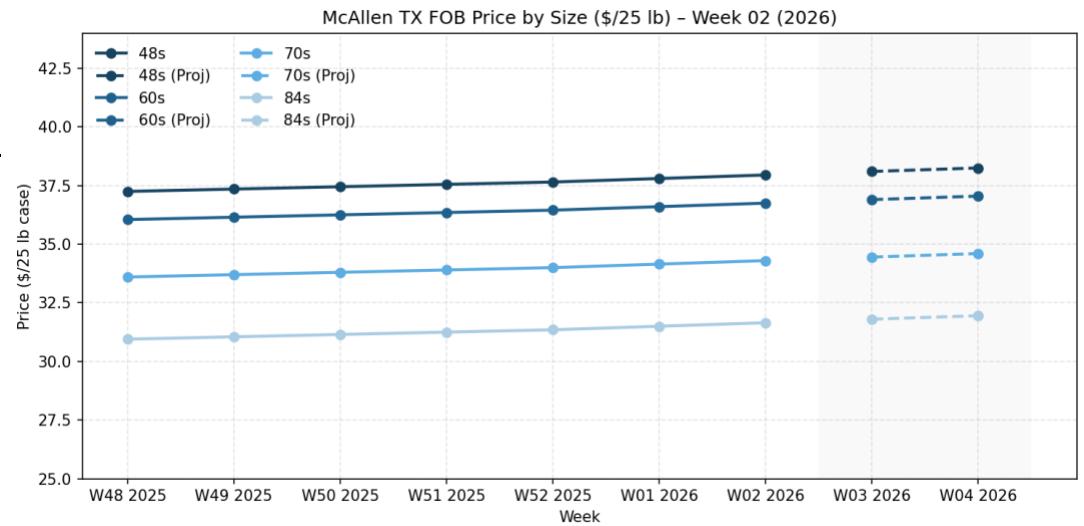
Small-scale features or regional tests can help gauge post-holiday demand without overexposing margin.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 2 of 2026 reflects a market that is **settling into early-Q1 rhythm**, supported by reliable Mexican supply and gradually improving demand. The absence of Peru and California keeps the origin mix simple, while Colombia continues to provide useful but secondary mid-size support. The most important takeaways this week are the opportunity to rebuild volume methodically, the continued value and flexibility offered by mid-sizes, and the importance of pacing inventory growth as demand normalizes. Larger fruit remains relatively tight and should be purchased with discipline, while ripening and replenishment programs should scale up incrementally rather than all at once. With logistics steady and no immediate supply disruptions visible, Week 2 offers a stable foundation for measured, data-driven buying decisions as Q1 gets underway.

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