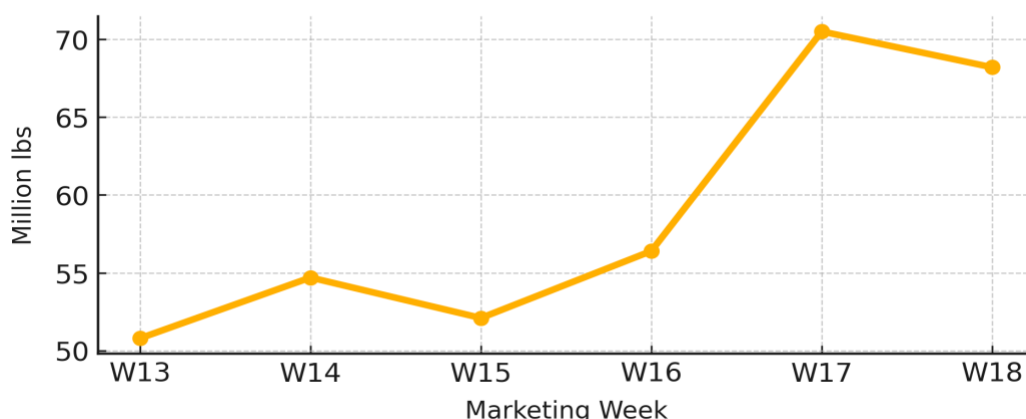


US Hass Avocado Market

Market Snapshot

- Inbound volume totaled 68.2 M lbs. in Week 18, easing from the record Cinco-de-Mayo surge but still 23 % above the 5-year average. Retail demand remains strong, with bags absorbing plentiful 60/70-count fruit.

Inbound Hass Avocado Volume • Weeks 13-18 2025



- FOB South Texas moved lower across the board: 48-count averaged \$62, 60-count \$55, and 70-count \$42 per 25-lb carton, widening the value gap for bag promotions.
- Hass avocados remain duty-free under USMCA. No tariff action materialized in April; the primary risk continues to be short-term phytosanitary suspensions tied to inspector-safety incidents.

Demand & Consumption

- Per-capita avocado intake hit ~9 lbs in 2024 (ERS). Consumption pace for 2025 is tracking marginally higher.
- Bags now account for 37 % of retail unit sales YTD (HAB Nielsen).
- Bag momentum: Bags now outsell bulk units in 21 of the top 50 DMAs; buyers who don't stock 60/70-count bag programs risk ceding share.
- Health halo untouched by Ozempic trend: Nielsen panel shows avocado buyers are *less* likely to reduce produce spend when adopting GLP-1 weight-loss drugs—healthy-fat positioning resonates with guidance given by dietitians.



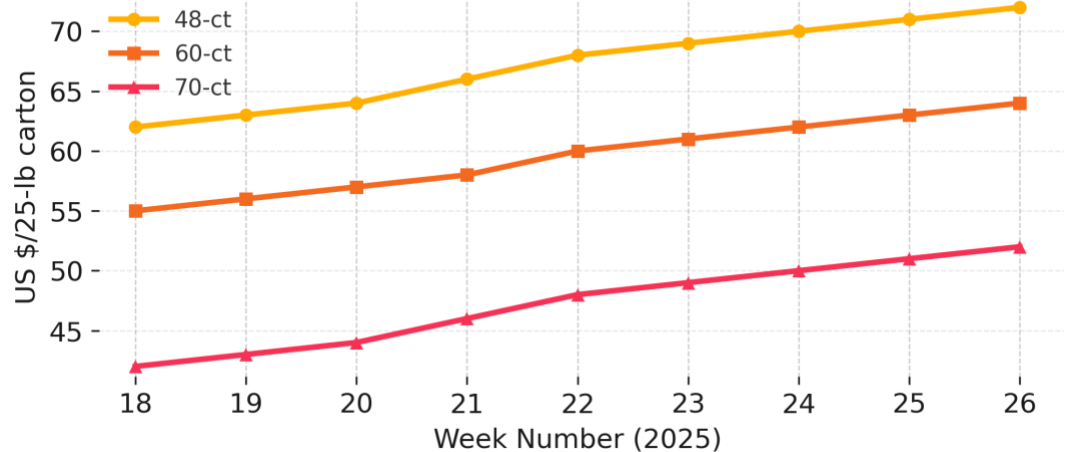
Plans & Estimates

Buyer Action Plan

- Book bag-spec 60/70-count fruit for Memorial Day and 4th of July ads before June supply tightens.
- Use surplus small fruit for food-service guacamole programs—input cost down 20 % vs. April.
- Run cross-merch promotions in late May
 - o Pair avocados with chips, salsa, and fresh pico to lift basket value +18 %.
- Monitor border & APHIS alerts continuously
 - o Set alerts for inspector-safety suspensions; a one-week shutdown can add \$5 FOB overnight.

Future Estimated Curve McAllen TX

Indicative FOB McAllen Forward Curve (Weeks 18-26 2025)



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