

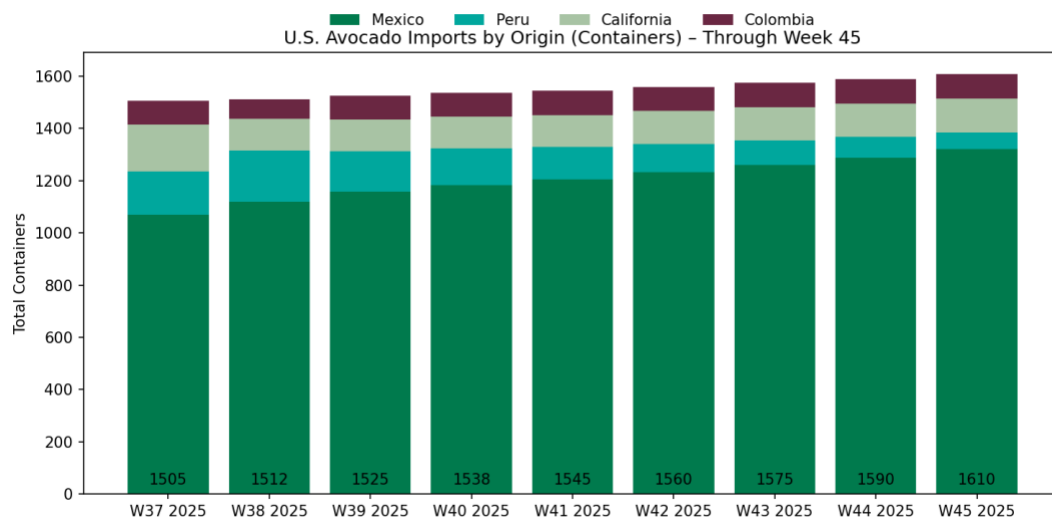
US Hass Avocado Market

Market Snapshot

Supply Origin

- In Week 45, the U.S. Hass avocado market remains **well supplied and firmly anchored by Mexico**, with a clear split between softer mid-size pricing and firmer large-fruit premiums. Mexican harvest volume continues at strong levels, with consistent crossings through Texas and West Coast ports keeping 48s, 60s, and smaller sizes broadly available. Mid-size fruit remains attractively priced and generally stable, giving buyers room to promote without triggering sharp rebounds. Larger sizes (32–40s) continue to run comparatively tighter, holding a firmer tone as demand from certain retail and foodservice programs stays focused on big fruit. Peru and California remain fully out of the equation, and Colombia's role is steady but secondary, adding helpful mid-size support on the East Coast without changing the national price structure. Movement through major terminals is solid, supported by normal seasonal demand and reliable ripening supply. Overall, Week 45 carries a **steady, slightly buyer-leaning tone**, defined by strong Mexican availability and continued value in mid-sizes.

Supply Origin & Changes



Overall import tone – Stable, fully covered

- Total arrivals broadly consistent with recent weeks.
- Mid-sizes soft/stable; large fruit firm and premium.
- No major port, weather, or freight disruptions reported (generalized).



Supply Origin

Mexico – Strong, overwhelmingly dominant

- Likely **≈90% of total U.S. imports** (directional).
- Fall harvest in full swing; stable crossings via Texas and key coastal ports.
- Deep availability on 48s, 60s, 70s; comparatively lighter but steady 32–40s.
- Quality and pack consistency remain dependable.

Buyer Action Plan

Colombia – Steady supplemental contributor

- Stable single-digit share of total supply.
- Useful mid-size support into East Coast/Gulf ports.
- Treated as supportive rather than primary supply.

Peru – Fully exited

- No commercial arrivals.
- Not available for any planned programs, promos, or spots.

California – Domestic season finished

- No meaningful influence on national supply.
- Any leftover fruit is local/residual and not market-moving.

Buyer Action Plan

- **Keep mid-sizes (48s & 60s) as your primary volume and promo drivers.**

Pricing on mid-sizes remains favorable and relatively stable, making Week 45 a strong window for price-forward ads, menu features, and solid coverage for ripening programs.

- **Build all meaningful programs around Mexican supply.**

Mexico is the only origin with the size range, quality, and volume needed to support reliable weekly specs. All multi-week or holiday-front planning should assume Mexico as the backbone origin.

- **Treat Peru and California as fully out of the picture.**

Neither origin should be included in forward supply assumptions. Any isolated lots are one-off opportunities only and should not backstop ads or long-term commitments.

- **Use Colombian fruit strategically for East Coast mid-size reinforcement.**

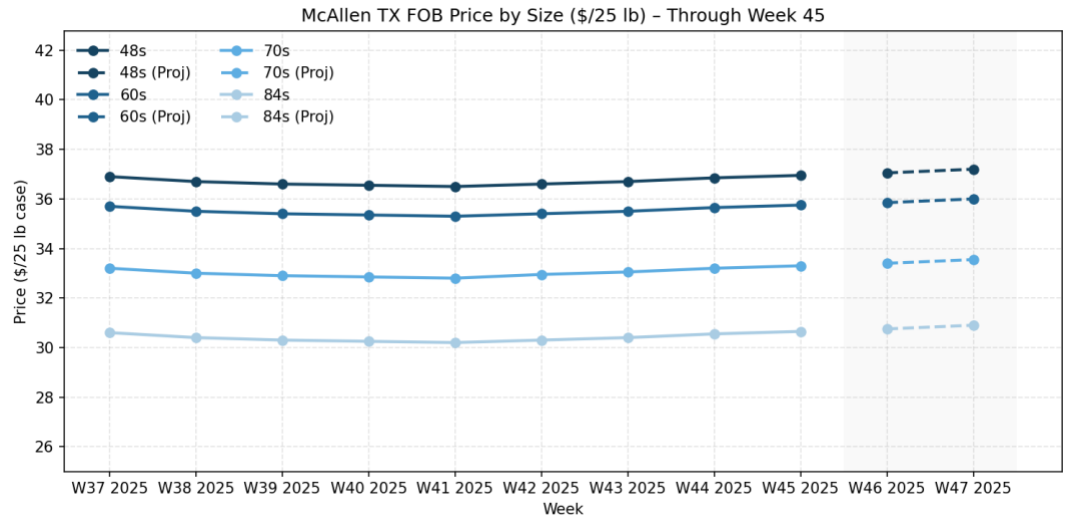
Colombian shipments can help fine-tune 48/60 coverage into Eastern and some Gulf ports, supporting flexibility without overextending on additional Mexican loads.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 45 closes with a **stable, Mexico-dominated market** that continues to present solid buying opportunities, especially on 48s and 60s. Mexican harvest volume and quality remain reliable, providing the consistency buyers need as holiday planning ramps up. Peru and California are fully absent from the commercial landscape, and Colombia maintains a steady but clearly secondary role as a mid-size supplement on the East Coast. The key takeaways this week are the continued value and stability in mid-size pricing, the need to base all meaningful programs on Mexican supply, and the advantage of keeping promotions short and tactical as Mexico's size curve shifts through the fall. Larger fruit remains comparatively tight and should be protected with premium, tiered pricing. With logistics operating normally and no major supply shocks on the radar, Week 45 offers another predictable, buyer-friendly environment for strategic avocado purchasing.



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