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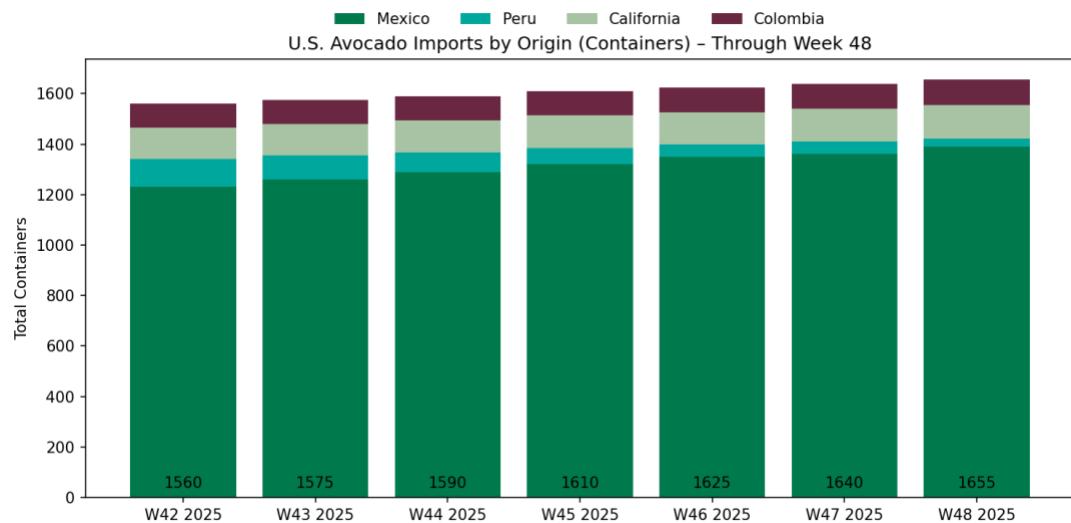
US Hass Avocado Market

Market Snapshot

Supply Origin

- In Week 48, the U.S. Hass avocado market remains **well supplied, stable, and overwhelmingly driven by Mexico**, with pricing patterns that continue to favor mid-size fruit. Mexican harvest volume is strong and consistent as the season moves toward the core holiday period, with steady crossings through Texas and key coastal ports keeping 48s, 60s, and 70s widely available. Mid-size pricing remains **soft but orderly**, giving retailers and foodservice buyers room to run or extend promotions without generating major price spikes. Larger sizes (32–40s) continue to run comparatively tighter and hold a noticeable premium as demand from specific retail specs and higher-end foodservice programs focuses on larger fruit. Peru and California remain fully absent from the commercial landscape, and Colombia maintains a modest but steady role, primarily supporting mid-size supply into East Coast ports. Movement through major terminals is solid and in line with normal seasonal demand. Overall, Week 48 carries a **steady, slightly buyer-leaning tone**, supported by strong Mexican availability and ongoing value in mid-sizes.

Supply Origin & Changes



Overall import tone – Stable and fully covered

- Total arrivals broadly in line with recent weeks.
- 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 – High 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 present.
- Quality and pack consistency remain strong across major exporters.

Colombia – Steady, secondary contributor

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

Peru – Fully exited

- No commercial arrivals at this point in the season.
- Not available for programs, spots, or promotional planning.

California – Domestic season finished

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

Buyer Action Plan

- **Keep 48s & 60s as your primary volume and promotional engine.**

Mid-size pricing remains attractive and predictable, making Week 48 a strong window for price-forward retail ads, menu features, and solid coverage as holiday demand builds and resets.

- **Base all serious programs and holiday planning on Mexico.**

Mexico is effectively the **only origin** that can provide the volume, quality, and size distribution needed for reliable weekly specs. All meaningful multi-week and holiday-front planning should be anchored on Mexican supply.

- **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, offering limited diversification and flexibility without overcommitting on additional Mexican loads.

- **Defend premium pricing and margin on larger sizes (32–40s) with clear tiers.**

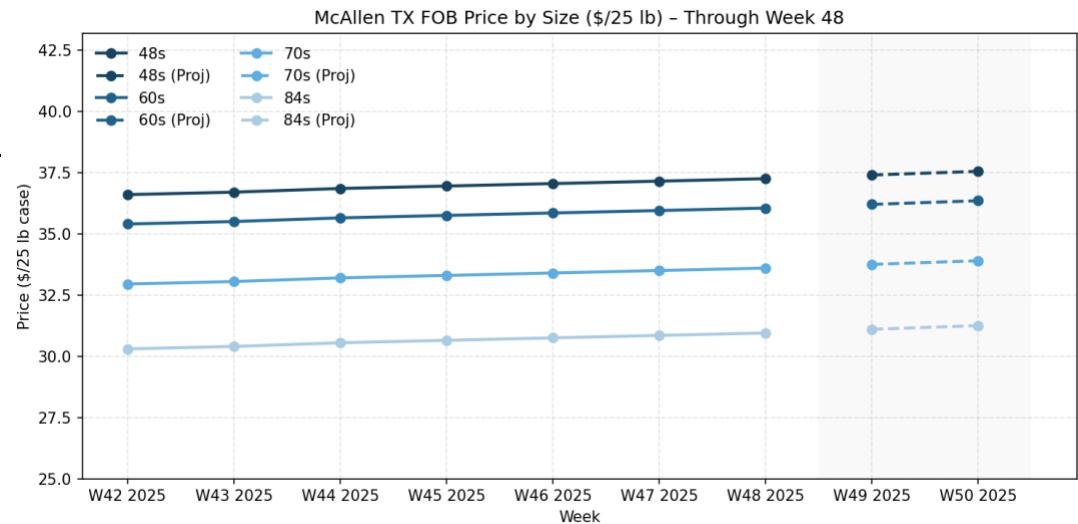
Larger fruit remains relatively tight and should maintain a noticeable price step above mid-sizes. Use structured tiered pricing so 32–40s keep their premium while 48s and 60s carry the volume story.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 48 closes with a **stable, Mexico-centric market** that continues to favor buyers on mid-size fruit while maintaining firm premiums on larger sizes. Mexican harvest volume and quality remain reliable as the industry navigates late-fall and early holiday demand, providing the consistent base needed for both program and promotional planning. Peru and California remain fully absent, and Colombia continues to play a modest but steady role as a mid-size supplement into East Coast ports. The key takeaways this week are the sustained value and stability in 48s and 60s, the necessity of building all major programs around Mexican supply, and the benefit of short, tactical promotional windows that track Mexico's evolving size mix. Larger fruit remains relatively tight and should be protected with tiered pricing and defined premiums. With logistics functioning normally and no major supply shocks in view, Week 48 offers another predictable, buyer-friendly environment for strategic avocado purchasing.



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