

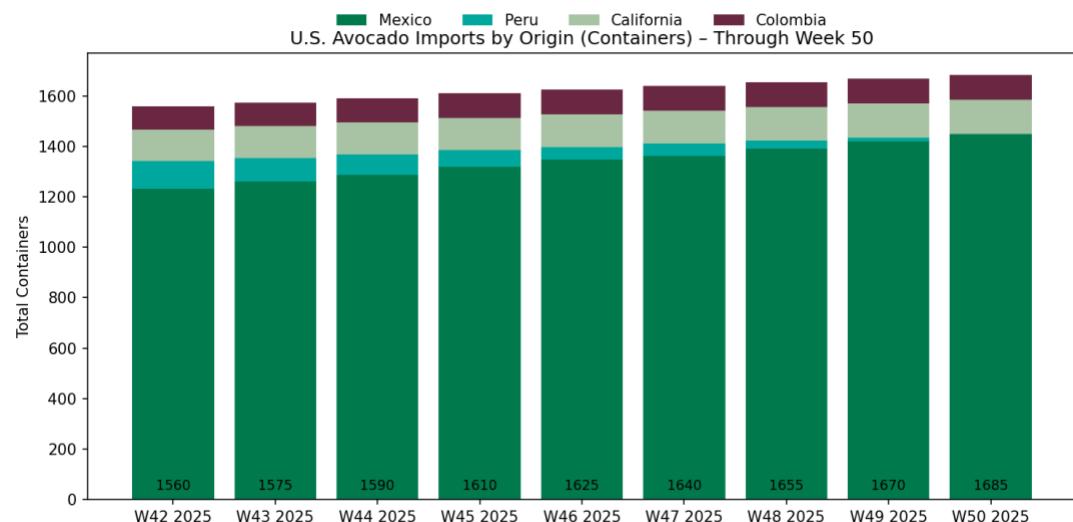
# US Hass Avocado Market

## Market Snapshot

## Supply Origin

- In Week 50, the U.S. Hass avocado market remains **stable, well supplied, and firmly anchored by Mexico** as the industry moves deeper into December and approaches the year-end holiday period. Mexican harvest volume continues at solid levels, with consistent crossings through Texas and coastal ports keeping 48s, 60s, and 70s widely available across the country. Mid-size fruit pricing remains **soft but orderly**, allowing buyers to maintain promotions and strong coverage without triggering upward pressure on the market. Larger sizes (32–40s) continue to run comparatively tighter and hold a premium, supported by steady demand from retail and foodservice programs that favor larger fruit presentations. Peru and California remain fully absent from commercial supply, while Colombia continues to contribute modest but steady volumes, primarily reinforcing mid-size availability on the East Coast. Movement through major terminals is steady and aligned with normal seasonal demand, and logistics remain fluid with no widespread disruptions reported. Overall, Week 50 reflects a **predictable, slightly buyer-leaning market**, driven by reliable Mexican supply and continued value in mid-sizes.

## Supply Origin & Changes



Overall import tone – Stable and fully covered

- Total arrivals broadly consistent with Weeks 48–49.
- Mid-sizes remain soft/stable; large fruit firm and premium.
- No notable port, weather, or freight disruptions reported (directional).



## Supply Origin

### Buyer Action Plan

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#### Mexico – Strong volume, overwhelmingly dominant

- Likely **around 90% of total U.S. supply** (directional).
- Harvest and crossings remain consistent through Texas and West Coast ports.
- Deep availability on 48s, 60s, and 70s; 32–40s available but relatively tighter.
- Quality and pack consistency remain dependable across major exporters.

#### Colombia – Steady, secondary contributor

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

#### Peru – Fully exited

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

#### California – Domestic season finished

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

## Buyer Action Plan

- **Continue to use 48s & 60s as the primary volume and promotional drivers.**

Mid-size pricing remains attractive and predictable, making Week 50 well suited for sustaining retail ads, foodservice features, and reliable ripening programs through the holiday period.

- **Anchor all core programs and year-end planning on Mexico.**

Mexico remains the only origin with the volume, quality, and size distribution needed to support consistent weekly specs. All meaningful December and year-end planning should be built around Mexican supply.
- **Use Colombian fruit tactically to reinforce East Coast mid-size coverage.**

Colombian arrivals can help fine-tune 48/60 availability into Eastern and some Gulf ports, providing flexibility without overcommitting to additional Mexican volume.
- **Protect margin on larger sizes (32–40s) with clear tiered pricing.**

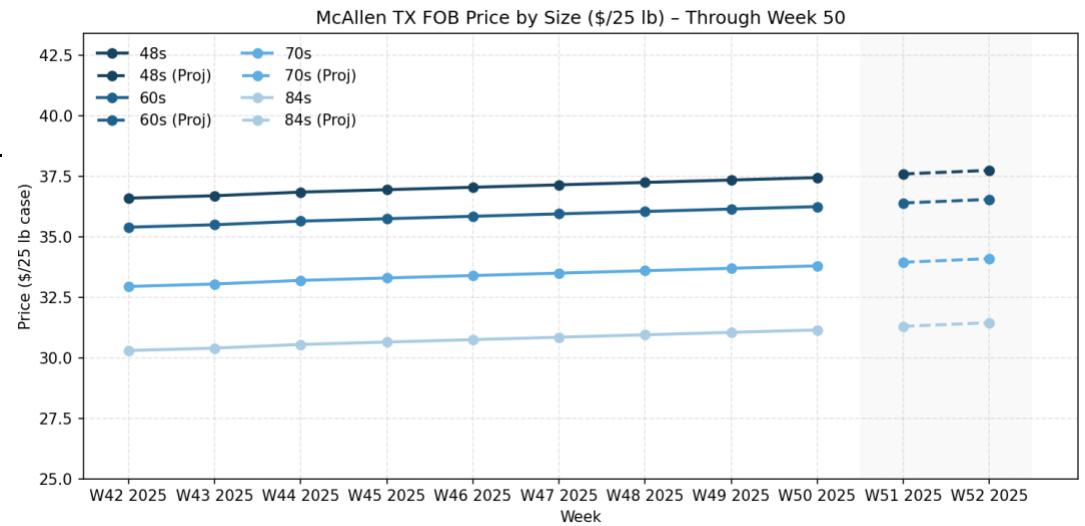
Larger fruit continues to run tighter and should maintain a defined premium over mid-sizes. Structured pricing tiers help preserve margin while allowing mids to drive volume.



## Future Estimated Curve McAllen TX

*Estimated Curve*

*Conclusion*



## Final Thoughts

Week 50 closes with a **stable, Mexico-dominated market** that continues to favor buyers focused on mid-size fruit while maintaining firm premiums on larger sizes. Mexican harvest volume and quality remain dependable as the industry moves through the holiday season, providing a consistent foundation for both program and promotional activity. Peru and California remain fully absent from the supply mix, and Colombia continues to play a modest but reliable role as a mid-size supplement, particularly on the East Coast. The key takeaways this week are the sustained value and stability in 48s and 60s, the necessity of anchoring all meaningful programs in Mexican supply, and the importance of keeping promotions short and tactical as size curves evolve. Larger fruit remains comparatively tight and should be protected with tiered pricing and clear premiums. With logistics functioning normally and no major disruptions in sight, Week 50 offers another predictable, buyer-friendly environment for strategic avocado purchasing.



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