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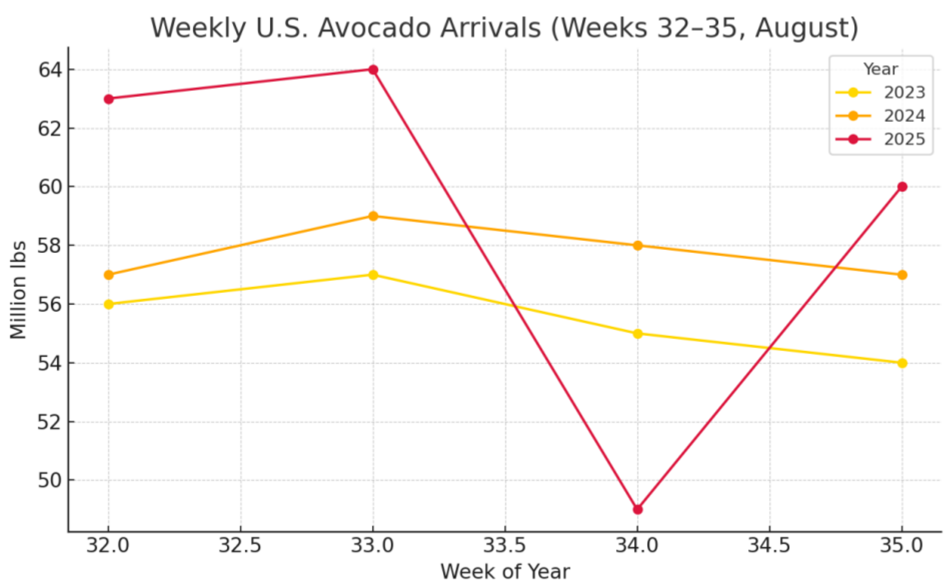
US Hass Avocado Market

Market Snapshot

- Avocado imports saw a mid-month slowdown with Week 34 at 1,591 containers/trucks, a 2% increase from the prior week and 9% higher year-over-year, while Week 35 logged 60.6 million lbs in arrivals. Mexico remained the largest supplier, and Peruvian and Colombian supplies continued to supplement market needs. Despite slightly lower volumes late in the month, the market retained strong supply foundations, supporting seamless retailer promotions and steady shelf flow. This balance gave buyers confidence that even with brief dips, the overall structure of supply remained reliable.



Supply Mix

- **Mexico**: Continued leading origins with strong, consistent inflows.
- **Peru**: Maintained a meaningful role, especially mid-month, helping relieve pressure on Mexican shipments.
- **California**: Provided modest regional volume that supported freshness in localized markets.
- **Colombia**: Played a limited but helpful part in helping diversify sourcing.

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Plans & Estimates

Price Picture

- FOB prices softened slightly by late August, dropping to around $30 per carton for conventional 48s, while organic fruit carried a typical 20–25% premium. Retail advertised avocado prices held firm, even rising relative to the prior year—average consumer prices climbed about 19% year-over-year during late-August ad cycles. Although FOB eased, retail demand and effective promotions helped preserve margin integrity for suppliers and retailers alike. The ability to keep consumer-facing prices elevated despite easing FOBs underlined the strength of retail positioning during this period.

Demand & Downstream Dynamics

- **Bagged and mid-size Hass** remained top performers as convenience continued to resonate with shoppers.
- **Larger fruit** required promotional support to maintain velocity, though supply helped prevent major logjams.
- **Retailers** kept visibility high with messaging and value packs, reinforcing steady movement despite softening FOBs.

Final Take-Away

Take-away: August 2025 ended on a stable note: imports remained healthy, FOB pricing softened modestly, and retail continued strong under effective promotional strategy. Mexico's consistent supply, combined with Peru's mid-month peak, balanced the market through the late-summer surge. Retail turnover stayed strong, especially in value formats, helping preserve revenue as the market moved toward quieter fall months. Overall, the month reinforced confidence in the avocado category's resilience and adaptability heading into the next seasonal phase.

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Contact Us

312 112th St S Suite A | Tacoma WA, 98444
253-353-5529 | ethan@theandeanconnection.com
Ethan Mayer – Executive Manager