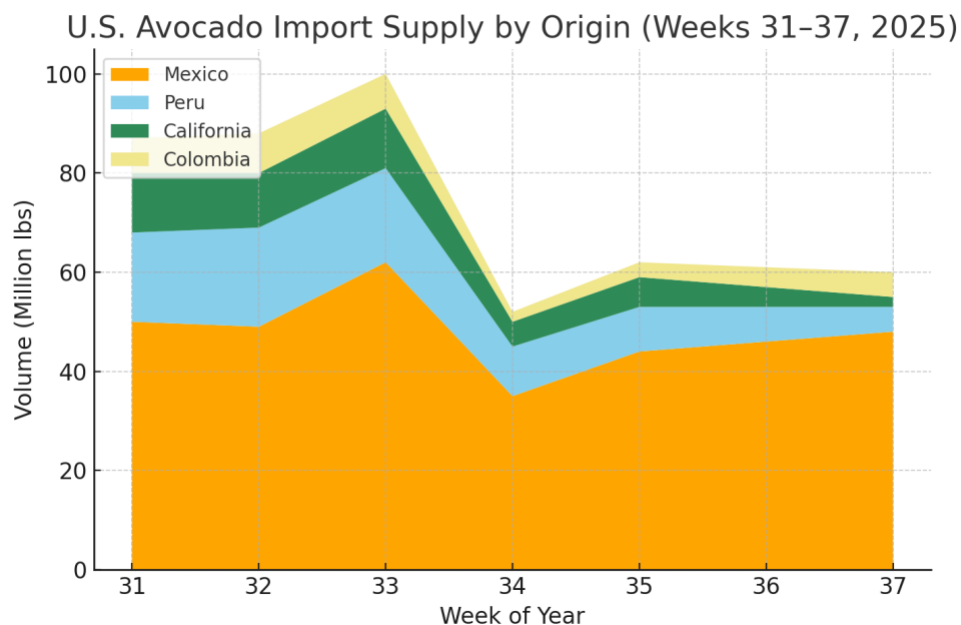


US Hass Avocado Market

Market Snapshot

- During Week 37, the U.S. Hass avocado market held a steady-to-firm tone as Mexico solidified its role as the primary source of fruit. Arrivals from Peru declined further, leaving only modest volumes on the East Coast, while California's domestic season is effectively complete. Colombian shipments gained some traction at Eastern ports, supplementing supply but not yet at a scale to move the broader market. Overall volume into the U.S. was adequate to meet demand, though some buyers noted firmer delivered pricing in northern destinations due to tight truck capacity. The market outlook remains balanced but with a cautious undertone as reliance on Mexico increases heading into the final quarter.



- Mexico:** Continued to dominate the market with more than two-thirds of total supply, showing stable flows through Texas.
- Peru:** Participation dropped sharply, with only limited arrivals left, mostly targeted to East Coast receivers.

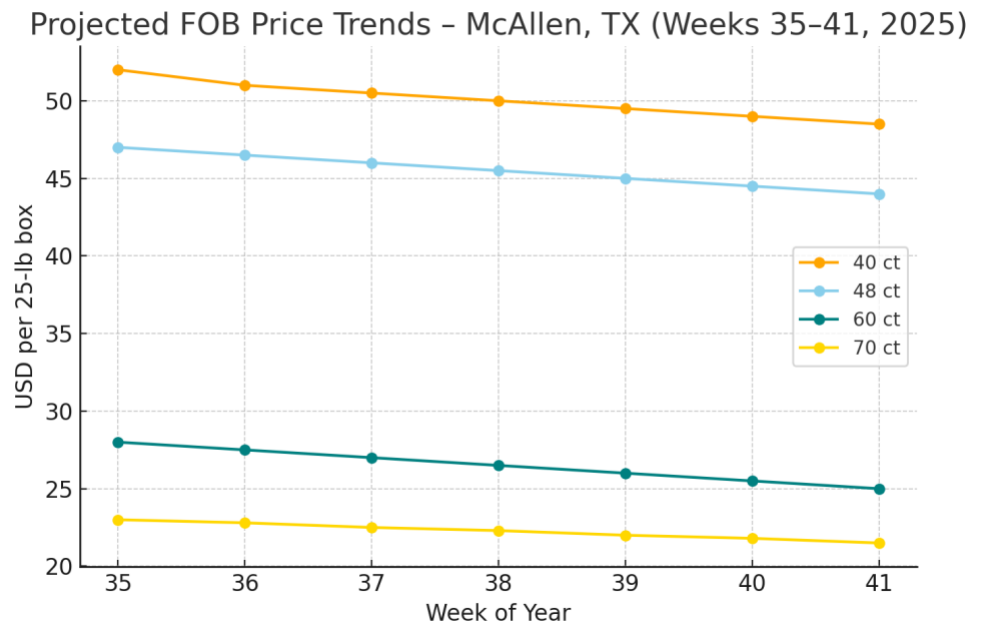


Plans & Estimates

Buyer Action Plan

- **Prioritize securing Mexican supply programs**, particularly on 48s and 60s, to ensure coverage through the fall.
- **Expect fewer opportunistic buys from Peru** as seasonal volume declines further.
- **Leverage Colombian arrivals** on the East Coast where available, especially for mid-sized fruit.

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