



Volume 1 | Issue
42
10/17/25

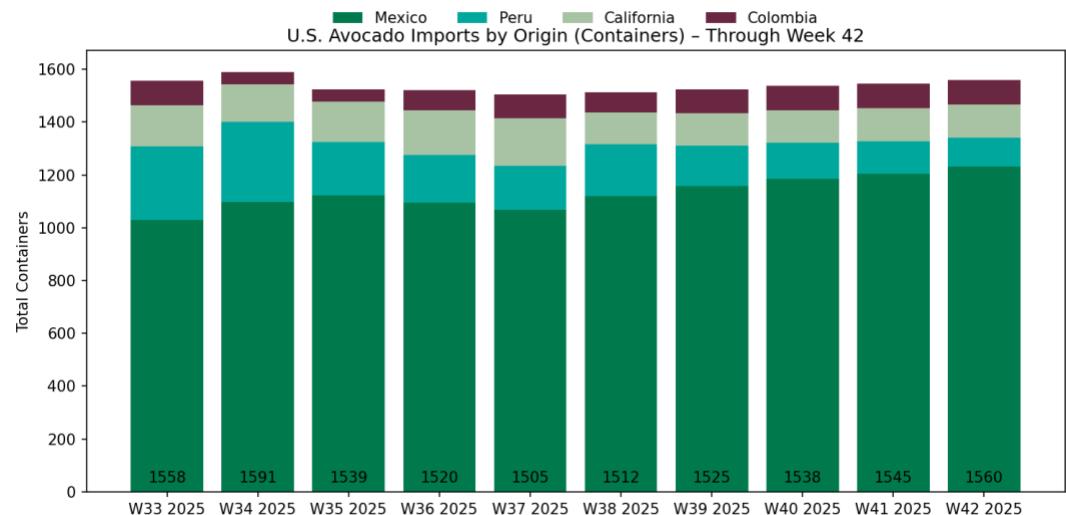
US Hass Avocado Market

Market Snapshot

Supply Origin

- Week 42 maintains a **steady, fully supplied market** with a price structure that continues to favor mid-size fruit. Mexico increased crossings again this week as fall harvesting conditions improved, providing consistent volume and solid size distribution across 48s, 60s, and 70s. Larger fruit (32–40s) remains tighter, holding a firmer tone due to lighter availability and stronger demand from both retail and foodservice buyers. Mid-size fruit continues to offer some of the best value of the quarter, with pricing comfortably below last year and movement holding strong across major U.S. hubs. Peru and California are now entirely out of the picture, leaving Mexico and Colombia as the only active contributors. Colombia continues to supply stable mid-size fruit to East Coast ports, adding useful support without significantly altering national pricing. Demand remains steady, and logistics continue to flow smoothly with no major delays at Texas or East Coast ports. Week 42 carries a **stable-to-soft tone**, shaped almost entirely by Mexico's expanding fall volume.

Supply Origin & Changes



Overall Import Tone – Steady, well balanced

- Total arrivals slightly above Week 41 but still manageable.
- Mid-sizes remain soft; large fruit holds firm.
- No meaningful freight or port disruptions.



Supply Origin

Buyer Action Plan

Mexico – Increasing volume, fully dominant

- Likely **85%+ of national supply** (directional).
- Steady improvement in fall harvest yields.
- Strongest availability on 48s, 60s, and 70s; lighter on 32s–40s.
- Quality and consistency remain reliable.

Peru – Season concluded

- Zero commercial arrivals.
- Not available for any programs or promotional planning.
- Any remaining fruit is isolated and residual.

California – Finished

- Domestic season closed out.
- No influence on national price or size mix.

Colombia – Consistent mid-size support

- Continued single-digit market share.
- Useful for 48/60 count support, especially on Eastern ports.
- Quality consistency holding steady week-to-week.

Buyer Action Plan

- **Maximize mid-size buying (48s & 60s)** while pricing remains soft.

Mid-sizes continue offering some of the best cost-per-pound opportunities of the fall. This is an excellent week for short retail promotions or strengthening foodservice commitments.

- **Keep Mexico as the foundation of all core programs.**

Mexico is now the **sole reliable full-volume origin**, and all multi-week planning must be structured around Mexican supply, especially for 48s and 60s.

- **Avoid integrating Peru or California into forward planning.**

Both origins are fully out, and any isolated lots should not be included in promotional commitments or long-term programs.

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

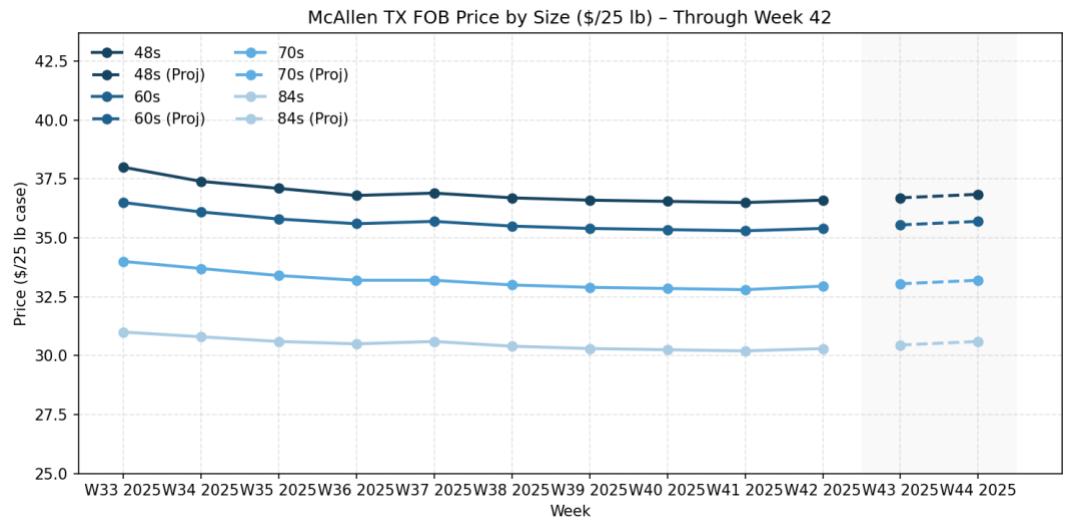
Colombia remains a strong supplemental origin for mid-size programs, especially for buyers needing flexible coverage or diversifying supply risk slightly.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Conclusion

Week 42 closes with a market that continues to favor buyers—particularly those targeting 48s and 60s—while larger fruit remains comparatively firm. Mexico's increasing fall volume is driving stability, consistency, and strong availability across most sizes, while Peru and California have fully exited and Colombia maintains steady supplemental support. The most important takeaways this week are the ongoing value in mid-sizes, the necessity of relying almost exclusively on Mexico for core programs, and the importance of keeping promotions short as Mexico's size curve evolves through the fall. Larger fruit will likely continue to command a premium, making tiered pricing an effective way to balance cost and margin. With smooth logistics and no major disruptions in sight, Week 42 remains a predictable and buyer-friendly environment.



Contact Us

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