

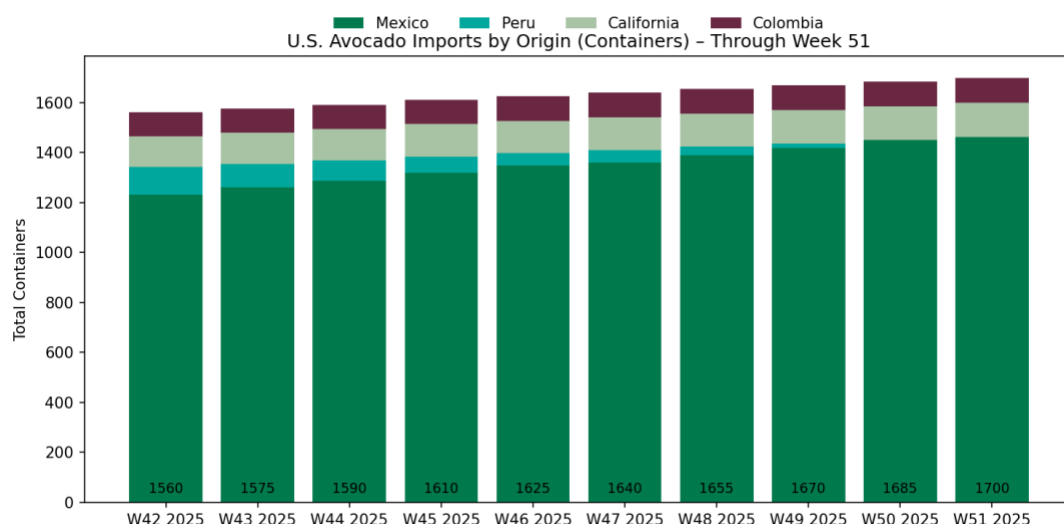
US Hass Avocado Market

Market Snapshot

Supply Origin

- Week 51 finds the U.S. Hass avocado market in a **stable, holiday-season holding pattern**, with supply largely dictated by **Mexico** and pricing behavior continuing to favor mid-size fruit. Mexican harvest volume remains consistent, and crossings through Texas and West Coast ports are providing reliable availability on 48s, 60s, and 70s nationwide. Mid-size pricing is **soft but disciplined**, allowing buyers to stay covered through year-end without sharp price swings. Larger sizes (32–40s) remain comparatively tighter and continue to command a premium as certain retail and foodservice programs maintain a preference for larger fruit counts. **Peru** and **California** remain fully absent from the commercial supply picture, while **Colombia** continues to provide modest but steady mid-size support, particularly into East Coast markets. Movement through major terminals is steady, reflecting lighter holiday staffing but balanced demand. Overall, Week 51 carries a **predictable, balanced-to-buyer-friendly tone** as the market transitions toward year-end positioning.

Supply Origin & Changes



Overall import tone – Stable and controlled

- Arrivals largely in line with Weeks 49–50.
- No major port, weather, or freight disruptions noted.
- Pricing structure unchanged: mids softer, large fruit firm.



Supply Origin

Buyer Action Plan

Mexico – Dominant and steady

- Estimated ~90% of total U.S. supply (directional).
- Consistent harvest and border crossings supporting reliable weekly coverage.
- Strong availability on mid-sizes; large fruit remains relatively tighter.

Colombia – Modest but reliable

- Single-digit share of total supply.
- Most useful for mid-size fills, especially on the East Coast.
- Supportive, not market-setting.

Peru – Fully exited

- No commercial arrivals.
- Not a factor in any planning or pricing decisions.

California – Season complete

- Domestic production finished.
- No impact on national availability or pricing.

Buyer Action Plan

- **Shift focus from promotion to coverage efficiency.**

With the holidays winding down, Week 51 is more about ensuring clean coverage than pushing aggressive ads. Mid-sizes still offer value, but over-buying ahead of year-end demand dips should be avoided.

- **Use mid-sizes to normalize inventory going into year-end counts.**

48s and 60s remain the easiest sizes to manage from both a cost and movement standpoint. These sizes are ideal for keeping inventory lean and balanced before year-end resets.

- **Be selective with large fruit commitments.**

Larger sizes remain tighter and premium-priced. Buyers should avoid defaulting to large fruit unless specs truly require it, especially with demand expected to soften briefly after the holidays.

- **Use Colombian fruit as a balancing tool, not a volume driver.**

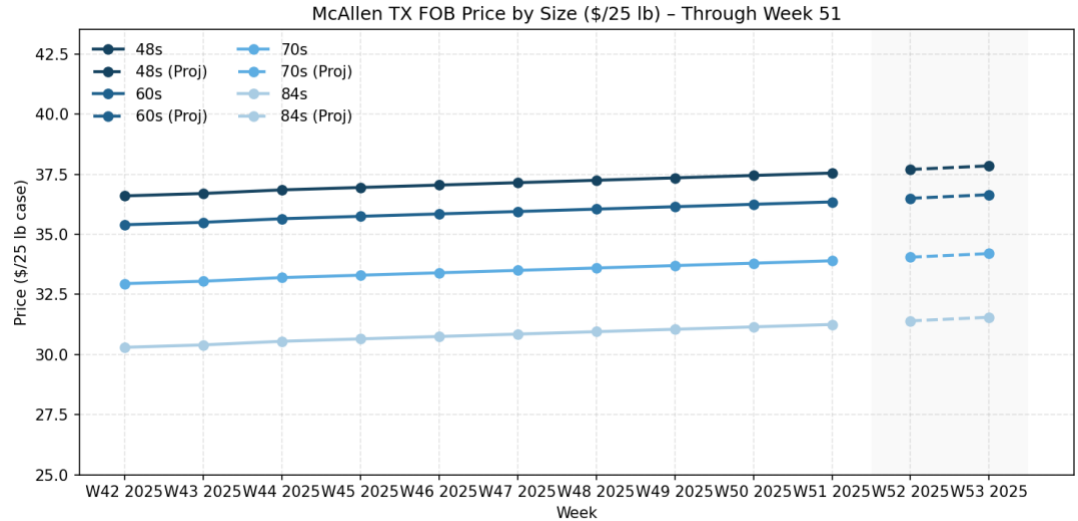
Colombian arrivals can help fine-tune mid-size availability where needed, but programs should remain Mexico-centric to avoid inconsistency during a slower movement week.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 51 closes with a **calm, controlled market environment** that emphasizes stability over opportunity-driven volatility. Mexican supply continues to provide a reliable backbone, while the absence of Peru and California simplifies planning and keeps the origin mix straightforward. The most important takeaways this week are the continued usefulness of mid-sizes for efficient coverage, the need to manage inventory conservatively through the holiday slowdown, and the advantage of beginning early-January planning while supply conditions remain predictable. Larger fruit remains comparatively tight and should be purchased deliberately, not reflexively. With logistics steady and no immediate market inflection points visible, Week 51 serves as a transitional period—bridging year-end execution with early Q1 positioning.



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