

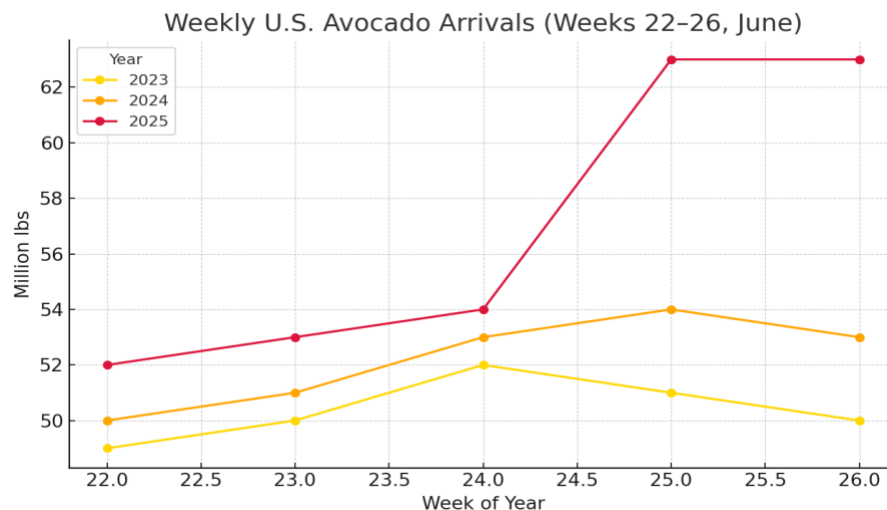


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US Hass Avocado Market

Market Snapshot

During June, U.S. avocado supply held relatively stable, with weekly arrivals averaging about **63 million lbs** early in the month and showing a lift toward the end of June. Mexico remained the dominant supplier, with Peru's seasonal rise becoming more visible mid-month as new fruit flowed into California ports. The overall supply balance kept the market from experiencing sharp volatility, though selective tightness in premium sizes introduced some localized firmness. This stability helped retailers plan promotions confidently, even as buyers began preparing for the heavier summer volumes.



Supply Mix

- **Mexico:** Provided the bulk of June imports, ensuring consistent supply through Texas crossings.
- **Peru:** Increased shipments mid-month, helping balance the market and ease price pressure.
- **California:** Added modest local production that complemented imports and improved freshness regionally.
- **Colombia:** Contributed small but steady volumes, offering buyers an additional sourcing option.



Plans & Estimates

Price Picture

- FOB prices showed mild downward adjustments during early June, reflecting adequate supply, but certain size categories such as 84s and larger commanded premiums due to limited availability. By mid-June, increased Peruvian arrivals softened the market slightly, creating better balance in pricing and easing pressure on buyers who were struggling with high premiums earlier. Retail prices largely held steady, as consistent import volumes supported promotions, and consumer demand remained reliable. This balance between moderate price adjustments and firm retail momentum created a stable market dynamic that carried through the month.

Demand & Downstream Dynamics

- **Consumer demand:** Remained resilient, with Hass avocados continuing strong ad presence and healthy promotional momentum.
- **Size shifts:** Larger fruit segments (e.g., extras and 84s) traded slower and edged at higher price points; smaller sizes moved faster, especially in multipack formats.
- **Retail behavior:** Stores maintained visibility through bagged and convenience packs, helping balance volume across size categories amid supply steadiness.

Final Take-Away

Take-away: June 2025 was defined by steady supply conditions, stable pricing, and firm retail demand, underpinned by Mexico's consistency and Peru's seasonal growth. While selective tightness in larger fruit supported higher premiums, the broader market benefited from well-balanced arrivals that avoided sharp disruptions. This month set a strong base heading into the heavier supply of July and August, giving buyers confidence to plan forward with less risk of volatility.



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