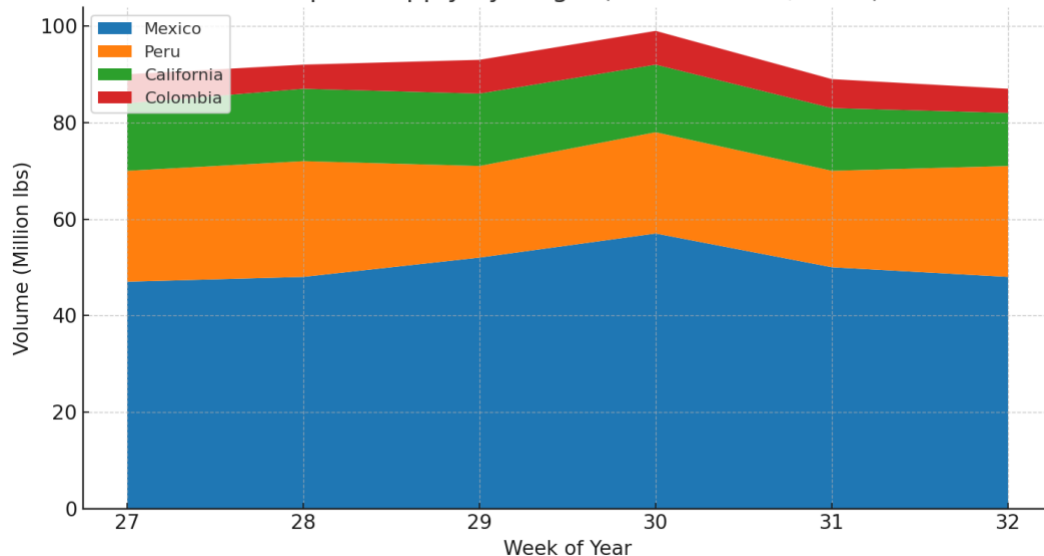# US Hass Avocado Market

Market Snapshot

- Avocado imports into the U.S. slowed in Week 31, with total arrivals **down about 15% from the previous week**, easing back after Week 30's peak inflows. **Mexico still led supply**, though its volume slipped, while **Peru and California remained steady contributors** and **Colombia softened slightly**. This dip reflects a normal seasonal adjustment, and while inbound flows are still healthy, the pace of arrivals has moderated compared to July's highs, signaling the market is moving into a steadier late-summer rhythm.

- On the retail side, **bagged avocados and medium-to-large Hass sizes** continue to outperform, helping retailers keep strong velocity on shelves despite the lighter overall supply. Smaller or irregular fruit continues to need deeper promotional activity to move, and with volumes easing, this category may become even more challenging for retailers without strong promotional strategies. Retailers are also reporting that promotional activity around standard sizing is delivering better-than-expected sales lift, suggesting that strategic timing and placement can offset some of the demand pressure from tightening supply.

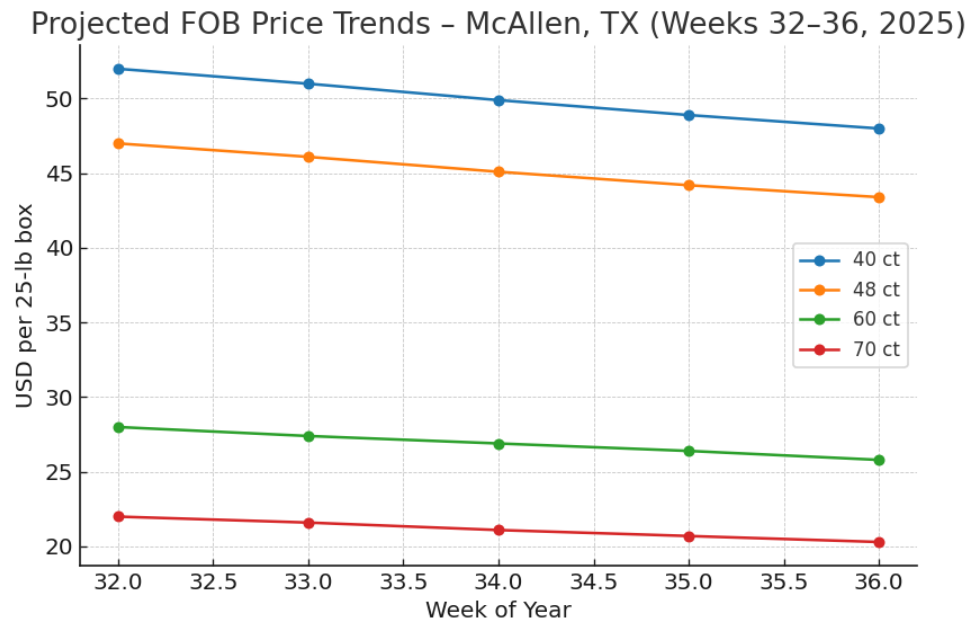U.S. Avocado Import Supply by Origin (Weeks 27–32, 2025)

![Andean Connection logo]

Plans & Estimates

Buyer Action Plan

- **Match buying to lighter inflows**: Imports are down 8%, so avoid overbuying and tighten projections accordingly.
- **Lean on Peruvian supply**: With Peru up 9%, consider supplementing Mexico orders with Peruvian fruit to balance volume.
- **Double down on bagged formats**: These remain the most resilient performers, ensuring consistent sell-through.
- **Support underperforming sizes with promotions**: Larger fruit needs promotional lift to avoid dragging inventory.
- **Keep tracking origin mix weekly**: Volatility among Mexico, Peru, and California means quick adjustments are key for late-summer planning.

Future Estimated Curve McAllen TX

Projected FOB Price Trends – McAllen, TX (Weeks 32–36, 2025)

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