

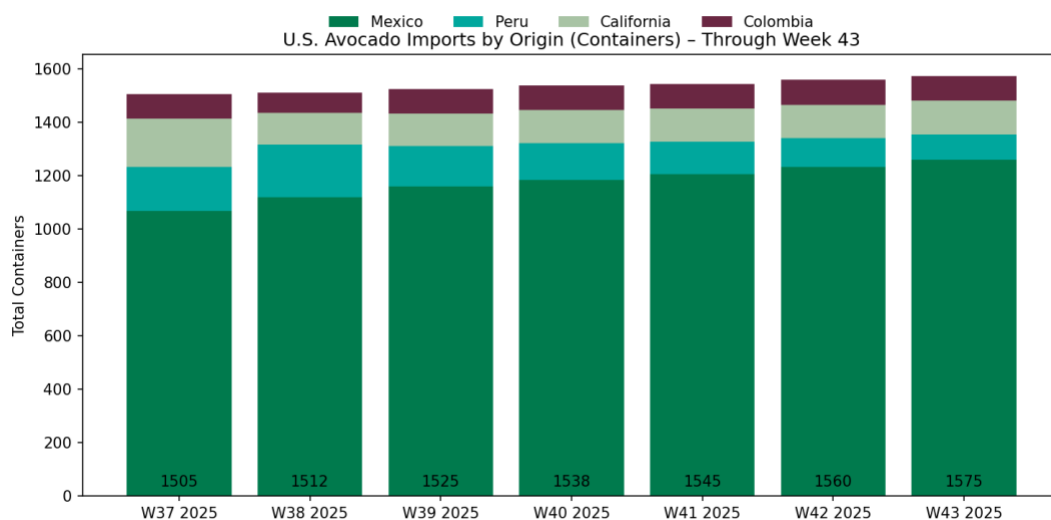
# US Hass Avocado Market

## Market Snapshot

## Supply Origin

- Week 43 continues the theme of a **Mexico-driven, well-supplied market** with ongoing value in mid-size fruit. Mexican harvest volume remains strong, and consistent crossings through Texas and key ports are keeping 48s and 60s widely available at attractive price levels. Compared to earlier in the fall, pricing on mids has begun to **stabilize at soft but more orderly levels**, while larger sizes (32–40s) still command a noticeable premium due to comparatively lighter availability. Peru and California are fully absent from the commercial landscape at this point, and Colombia's role as a supplemental East Coast origin is steady but not market-moving. Demand from both retail and foodservice is solid, with promotable opportunities continuing on mid-sizes and decent pull-through in major terminal markets. No significant logistics disruptions are reported, and freight flows are normal for this time of year. Overall, Week 43 carries a **stable, buyer-friendly tone**, anchored by Mexican supply and predictable pricing on mid-sizes.

## Supply Origin & Changes



## Overall Import Tone – Stable and well covered

- Total arrivals are steady vs Week 42.
- Mid-sizes remain soft but more stable, large fruit firm.
- No major port or freight disruptions reported.



## *Supply Origin*

### Mexico – Strong, fully dominant origin

- Likely **85–90% of national supply** (directional estimate).
- Fall harvest in full swing with consistent crossings.
- Deep availability on 48s/60s/70s; tighter but steady flow on 32–40s.
- Quality and pack consistency remain reliable.

## *Buyer Action Plan*

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### Peru – Fully exited

- No commercial arrivals.
- Not available for programs, spots, or promotions.

### California – Season over

- Domestic crop finished for the year.
- Any remaining fruit is purely local / residual and irrelevant to national pricing.

### Colombia – Stable supplemental origin

- Steady single-digit share of the market.
- Useful for mid-size support into East Coast and some Gulf ports.
- Quality generally consistent; lots treated as supportive, not primary.

## **Buyer Action Plan**

- **Continue to prioritize mid-sizes (48s & 60s) for value and promotions.**

Pricing on mid-sizes remains attractive and has begun to settle into a steady range. This is still a very good week for price-forward ads, menu features, or building moderately ahead for customers with strong pull-through.

- **Rely on Mexico for all core and promotional programs.**

Mexico is now effectively the **only origin capable of reliably meeting spec and volume needs** across the U.S. All long-term or multi-week planning should be built on Mexican supply.

- **Treat Peru and California as non-factors in planning.**

Both origins are off the table at this point in the season. Do not factor them into forward volume or promotional decisions.

- **Use Colombian fruit to fine-tune mid-size coverage in Eastern markets.**

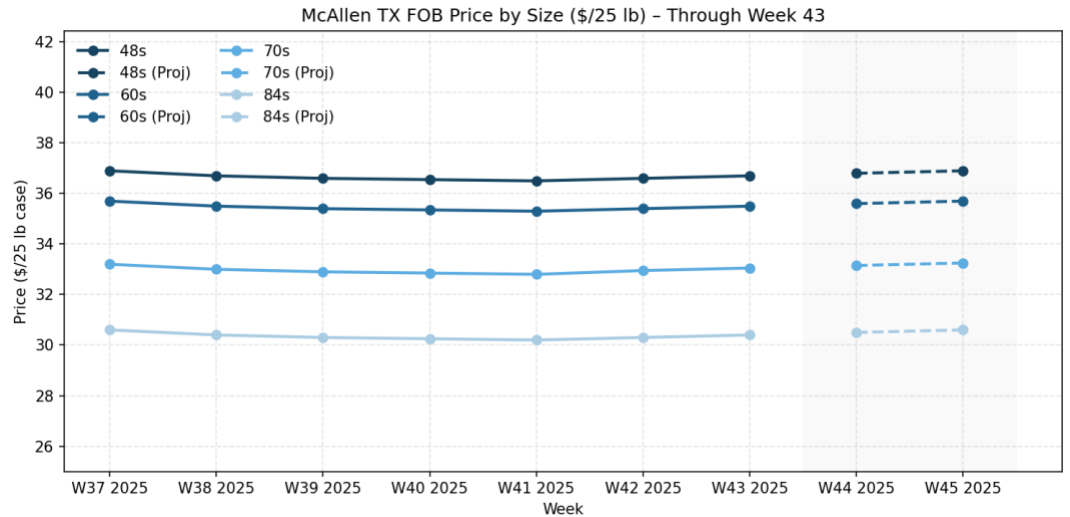
Colombian supply remains helpful for buyers on the East Coast who want a bit more flexibility or diversification. It's especially useful for mid-size fills or supporting ripening programs without overcommitting additional Mexican volume.



## Future Estimated Curve McAllen TX

*Estimated Curve*

*Conclusion*



## Final Thoughts

Week 43 wraps up with a market that remains comfortably supplied and tilted in favor of buyers, particularly those focused on 48s and 60s. Mexico's strong fall harvest continues to provide dependable volume and size distribution, while Peru and California are fully absent and Colombia plays a consistent but secondary support role. The key themes this week are the ongoing value and stability in mid-size pricing, the necessity of building all major programs around Mexico, and the importance of using short promotional windows to stay aligned with Mexico's evolving size mix. Larger fruit remains comparatively tight, reinforcing the need for tiered pricing strategies to protect margin on 32-40s. With logistics running smoothly and no significant disruptions on the horizon, Week 43 offers another stable, opportunity-rich environment for strategic avocado buying.



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