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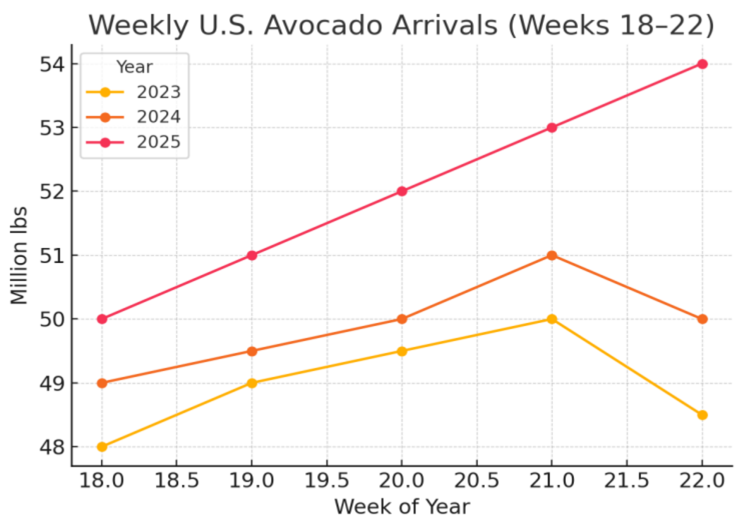
US Hass Avocado Market

Market Snapshot

- May 2025 (shipping weeks 18-22) moved an estimated about 265 million lbs into the U.S. market—about +6 % vs. May 2024 and +8 % vs. May 2023. Weekly arrivals climbed steadily from the low-50 million-lb range in early May to almost 55 million lbs by week 22, setting the stage for the larger June volumes now hitting the pipeline. HAB highlights show the trend continuing, with week 23 actuals at 60.9 million lbs and week 24 projections at 57.7 million lbs.



Supply Mix

- **Mexico:** Still the backbone at roughly 77 % of May inflows, yet Mexican shipments have been fractionally lower year-on-year (e.g., week 20 exports fell to 33.4 M lbs vs. ~45 M lbs in 2023) .
- **California:** Posted its strongest May in three seasons—about 55 M lbs for the month—off the back of a larger 2024/25 crop that's 58 % bigger than 2023's harvest .
- **Peru & Colombia:** Together supplied ~6 % of May volume in 2024 but nearly 9 % in 2025, with Peru's early fruit alone adding ~4 M lbs per week by month-end; Colombia's "traviesa" crop contributed a steady 1-2 M lbs.

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Plans & Estimates

Price Picture

- Average McAllen FOBs for conventional Hass during May 2025 held in the **$61-64/box (40 ct)** and **$57-60/box (48 ct)** range, about **$4-5/box higher** than the same time last year when plentiful Mexican fruit pushed large-size quotes into the high $50s. Medium and small sizes (60s/70s) averaged $38 and $30, respectively, versus $34 and $27 last May. Current USDA point-of-sale ranges confirm the firmer tone: 48 ct $61-63 and 60 ct $42-44 in early June

Demand & Downstream Dynamics

- **Cinco de Mayo lift:** Retail unit sales for the May 5 holiday hit 59.8 M (up 2 % YOY) and dollar sales jumped 22 % thanks to higher ASPs, keeping post-holiday inventories lean.
- **Food service rebound:** QSRs and fast-casual chains reported low-double-digit YOY growth in avocado usage, tightening large-fruit supply just as California's crop skews smaller.
- **Freight & costs:** Diesel hovered around $3.65-3.75/gal in May; most brokers baked a $0.50-$0.55/mi fuel surcharge into reefer line-haul, translating to $150-$200 extra on south-to-northeast loads.

Final Take-Away

Take-away: May 2025 closed with record-high early-summer volume despite a slight Mexican dip, because California and Peru filled the gap. Strong Cinco-de-Mayo movement and a resurgent food-service channel kept large-fruit prices buoyant, while plentiful 60s/70s moderated the overall price inflation. Looking forward, analysts expect total arrivals to stay 5-10 % above last year through July, with 60/70 ct cartons easing another $1-2 as Peruvian shipments peak.

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