

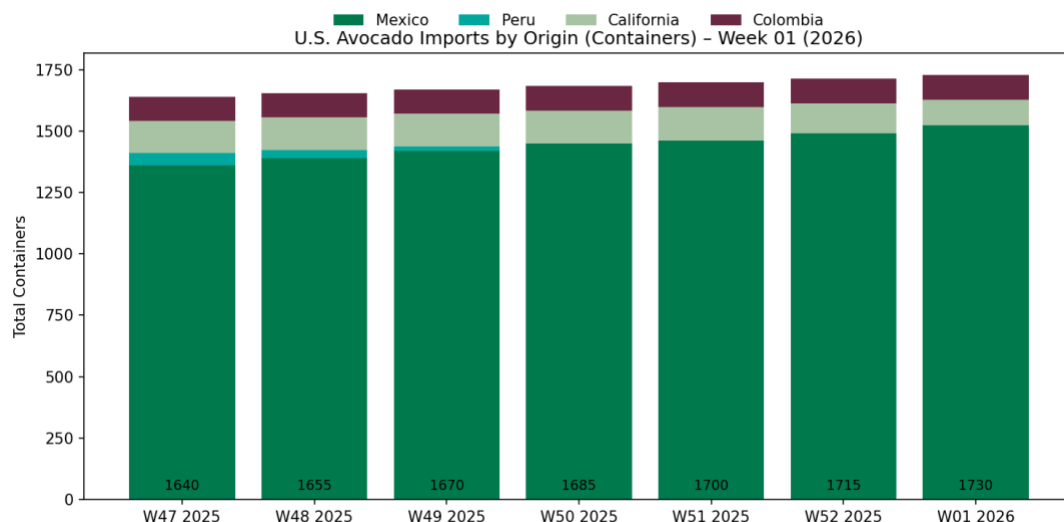
US Hass Avocado Market

Market Snapshot

Supply Origin

- Week 1 opens the new year with the U.S. Hass avocado market in a **measured reset phase**, transitioning out of holiday conditions and back into normalized buying patterns. Supply remains heavily anchored by **Mexico**, which continues to deliver consistent volume across most size categories through Texas and coastal ports. Mid-size fruit (48s and 60s) remains the most readily available and competitively priced segment, while larger sizes (32–40s) continue to trade at a firmer level due to relatively tighter availability and steady baseline demand. **Peru** and **California** remain fully absent from the commercial supply picture, simplifying sourcing decisions early in the year. **Colombia** continues to provide modest but reliable mid-size support, particularly into East Coast markets. Movement is gradually improving as retail and foodservice operations return to normal staffing and ordering rhythms. Overall, Week 1 reflects a **stable, orderly market** focused less on promotion and more on reestablishing baseline coverage for Q1.

Supply Origin & Changes



Overall import tone – Reset and stable

- Arrivals consistent with late December levels.
- No meaningful port congestion or freight disruptions.
- Market tone driven by demand normalization rather than supply shifts.



Supply Origin

Buyer Action Plan

Mexico – Primary and dominant

- Estimated ~90%+ of total U.S. supply (directional).
- Consistent harvest and border crossings post-holidays.
- Strong availability on 48s and 60s; larger sizes remain relatively tighter.

Colombia – Steady secondary origin

- Single-digit share of total imports.
- Most relevant for mid-size support on the East Coast.
- Supportive volume, not market-defining.

Peru – Out of season

- No commercial arrivals.
- Not expected to factor into Q1 supply planning.

California – Off-season

- Domestic production finished.
- No contribution to national supply.

Buyer Action Plan

- **Reestablish baseline coverage before chasing promotions.**

Week 1 is about getting inventories back to normal levels after the holidays. Buyers should prioritize stable weekly coverage rather than jumping immediately into aggressive ad activity.

- **Use mid-sizes to rebuild flow and consistency.**

48s and 60s remain the most flexible sizes for restarting movement, managing cost exposure, and resetting ripening programs after the holiday slowdown.

- **Evaluate large fruit needs carefully.**

Larger sizes remain premium-priced and may not see immediate post-holiday demand acceleration. Commit only to volumes tied to firm specs or contracted programs.

- **Use Colombian fruit selectively to balance East Coast supply.**

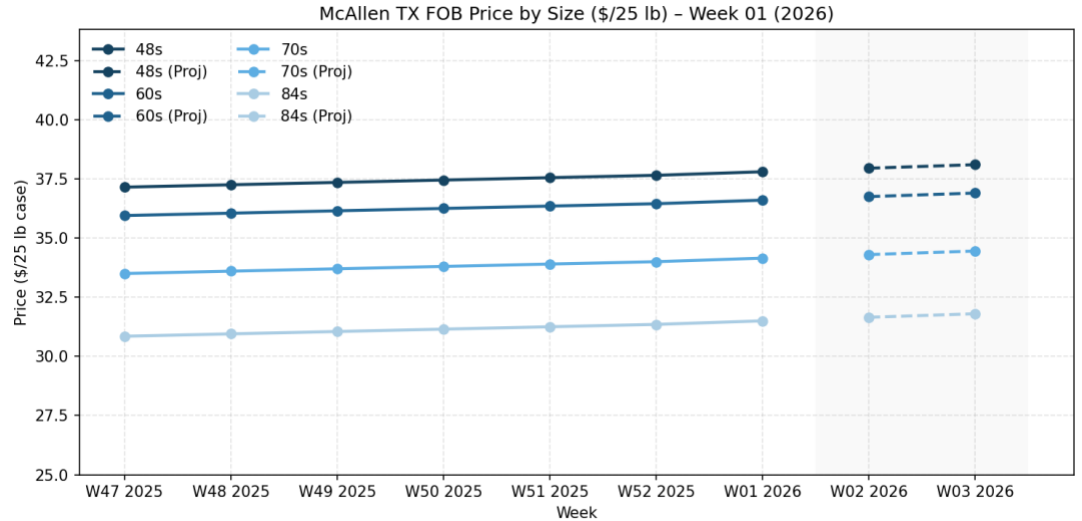
Colombian arrivals can help smooth mid-size availability and add flexibility, but Mexico should remain the core origin for consistency and scale.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 1 of 2026 begins with a **controlled, stable market environment** that emphasizes normalization rather than urgency. Mexican supply continues to provide a dependable foundation, while the absence of Peru and California keeps the origin mix straightforward and predictable. The key takeaways this week are the importance of rebuilding baseline coverage thoughtfully, leaning on mid-sizes for flexibility, and avoiding premature overcommitment as post-holiday demand patterns reestablish themselves. Larger fruit remains comparatively tight and should be purchased deliberately, while Colombian fruit offers useful but secondary support where needed. With logistics functioning smoothly and no immediate supply disruptions on the horizon, Week 1 serves as a calm starting point for disciplined, data-driven Q1 avocado purchasing.



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