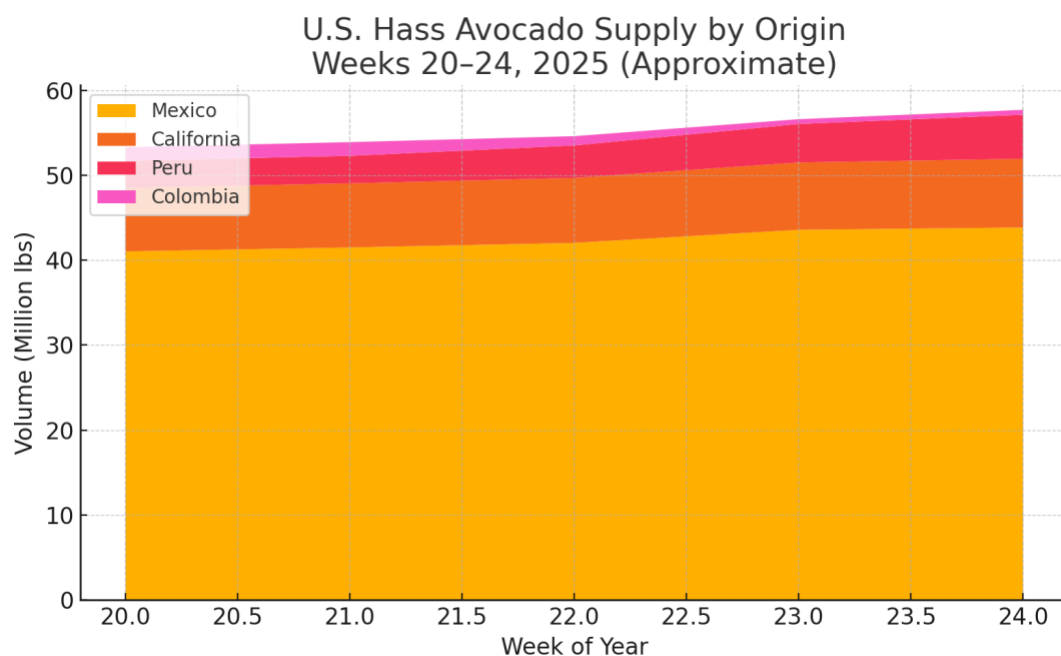


US Hass Avocado Market

Market Snapshot

Week 24 U.S. arrivals are projected at about 57.7 million lbs, up about 2 % from last week and roughly 10 % above mid-May. Mexico still supplies three-quarters of volume, but early Peru ($\approx 9\%$) and steady California ($\approx 14\%$) are edging up. Large fruit stays firm—FOB McAllen 40 ct mid-\$60s, 48 ct low-\$60s—while ample 60/70 ct sizes soften toward the mid-\$30s and high \$20s.



- **Prices (FOB McAllen, 25-lb box):** 40 ct \$64-66, 48 ct \$60-62 (steady-firm); 60 ct \$37-38 and 70 ct \$29-31 (softening).
- **Demand drivers:** Father's Day sell-through + food-service menu resets keep large-fruit tight; retail ads shift to value packs on 60/70 ct.
- **Origin mix:** Mexico 76 %, California 14 %, Peru 9 %, Colombia $\sim 1\%$; Peruvian share gaining each week.

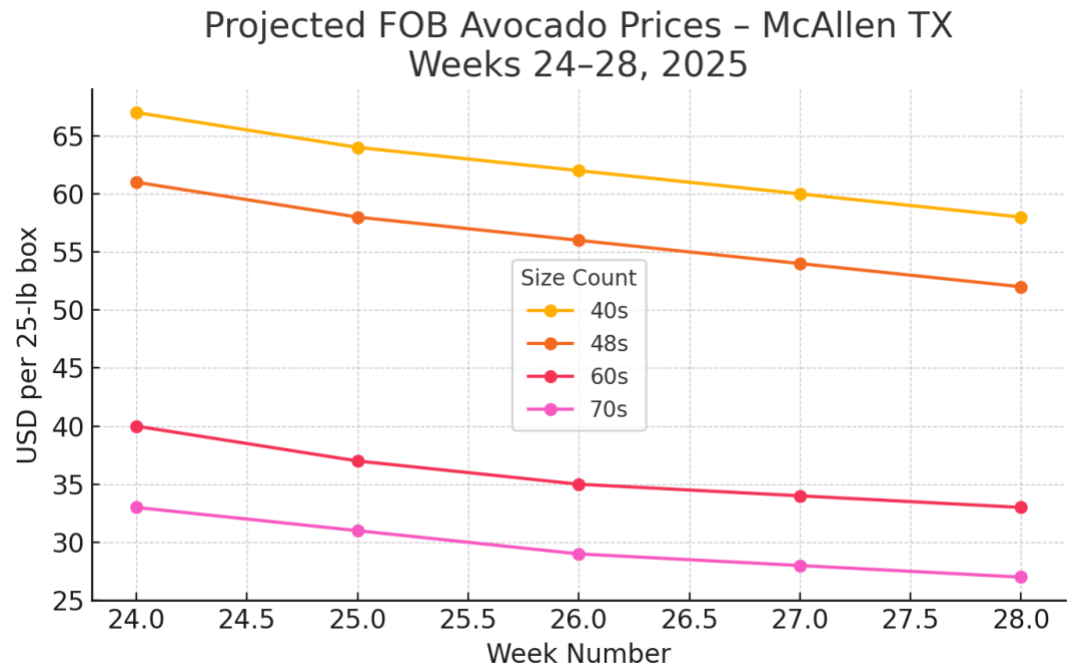


Plans & Estimates

Buyer Action Plan

- **Re-balance size mix:** Favor 60/70 ct spot buys while pricing leverage is strongest; keep big-fruit positions light until post-holiday demand cools.
- **Lock July promos:** With Peru volumes ramping, negotiate July-week ads at today's forward numbers (aim 48 ct \leq \$58, 60 ct \leq \$35).
- **Evaluate Peruvian suppliers:** Short-list at least two Peru packers for test loads; verify GLOBAL G.A.P. and SMETA certificates ahead of heavier July arrivals.
- **Prep for July 4 lull:** Historically, shipments dip 4-6 % in week 26 due to port closures—place safety-stock orders by the end of week 24 to cover the gap.

Future Estimated Curve McAllen TX



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