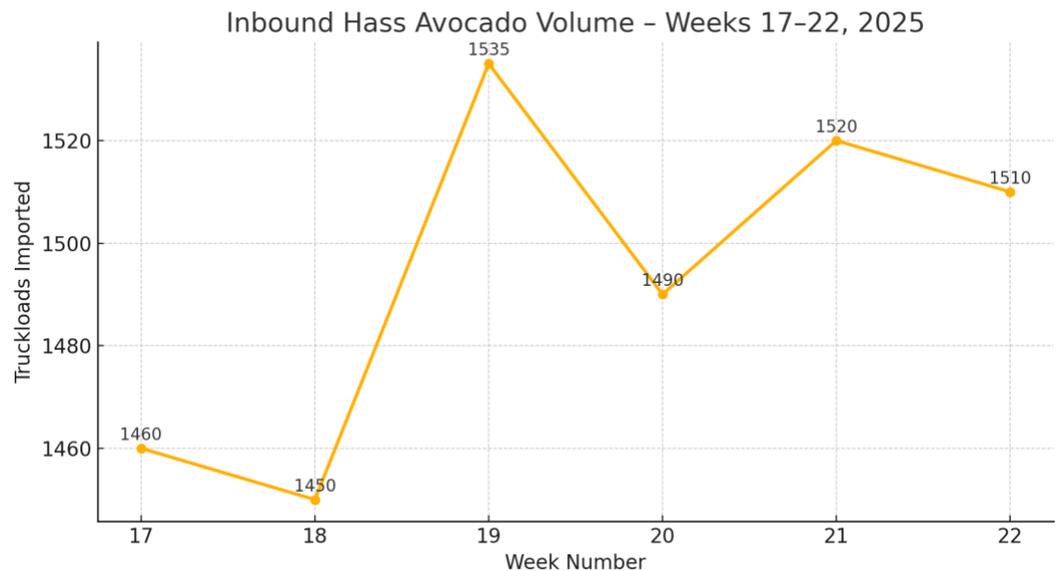


US Hass Avocado Market

Market Snapshot

- Inbound volumes leveled off at roughly 1,510 truckloads (~60 M lb), matching the prior two weeks even as Mexico’s late-season slide continued. California, Peru, and Colombia again filled the gap, trimming Mexico’s share to just over half of U.S. receipts—the smallest slice so far this spring. Mid-sizes (48/60 ct) held steady around the low-\$60s FOB McAllen, while smaller 84 ct fruit gained another 2–3 % amid talk that supply could “become saturated from week 22 onward” if growers don’t pace harvests.



- **Volume & trend:** ~1,510 truckloads kept the market well supplied, essentially flat week-on-week and still 2 % above the five-year norm for the date.
- **Origin mix shift:** Mexico ≈ 53 %, California 29 %, Peru 11 %, Colombia 7 %; non-Mexican origins have added seven share points since Week 20, cushioning any further Mexican declines.
- **Pricing pulse:** 48/60 ct FOBs steady at \$59–63; 84 ct cartons firmed to \$25–26 on continued retail pull, highlighting upside risk for small sizes if picking slows in June.

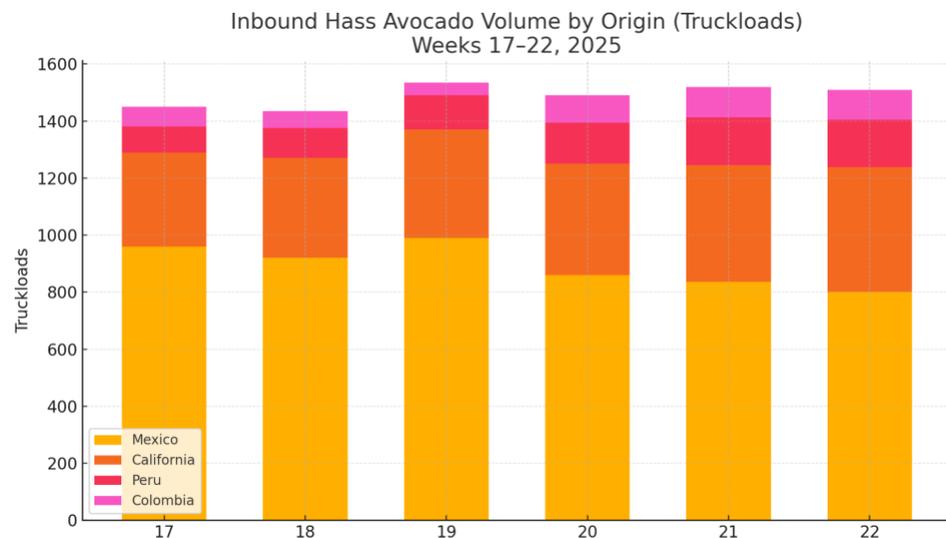


Plans & Estimates

Buyer Action Plan

- **Stock small counts early:** Size-84 prices have drifted up 2-3 % WoW— secure programs for bagged and food-service SKUs before retail ads absorb remaining inventory.
- **Rebalance mixed loads:** Negotiate split-48/60 cartons to capture soft mid-size pricing while guarding against sudden tightening if Mexican harvests slow faster than expected.
- **Prepare hurricane-season contingency:** Draft alternate supplier list and freight lanes now; early preparation speeds response to any Gulf-coast disruptions from late-June storms.
- **Audit ripening room throughput:** As temperatures rise, adjust ethylene cycles and airflow to prevent uneven ripening, especially on late-season Mexican lots prone to delayed color break.
- **Leverage “Locally Grown” marketing:** Promote California origin on store signage and digital ads to justify modest premiums and differentiate from price-focused competitors.

Previous Inbound Hass Volume by Origin



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