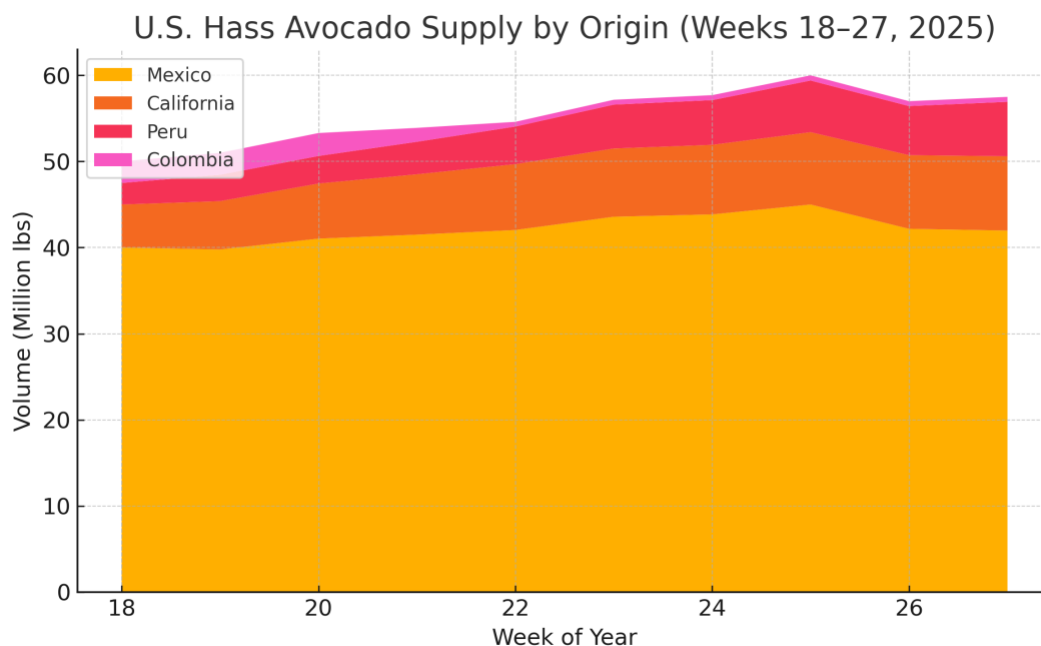


US Hass Avocado Market

Market Snapshot

- Avocado volumes are holding steady around 57–58 million lbs, with Mexico maintaining the largest share but California and Peru continuing to add meaningful supply. Post-July 4 demand has softened, leading to slightly easier pricing on larger fruit while mid-size and small counts remain abundant and competitively priced. Inventories at ripening centers are stable but elevated compared to early June, giving buyers more leverage to negotiate. Freight rates and diesel costs remain steady, keeping delivered costs predictable for now.



- Mexico remains the primary source, but California is peaking, and Peru continues gradual growth, diversifying available origins.
- Large-size pricing (40s/48s) is easing another \$1–2 per box, while mid- and small-size fruit is plentiful and highly negotiable.
- Inventories are stable but higher than June levels, increasing buyer leverage in most markets.

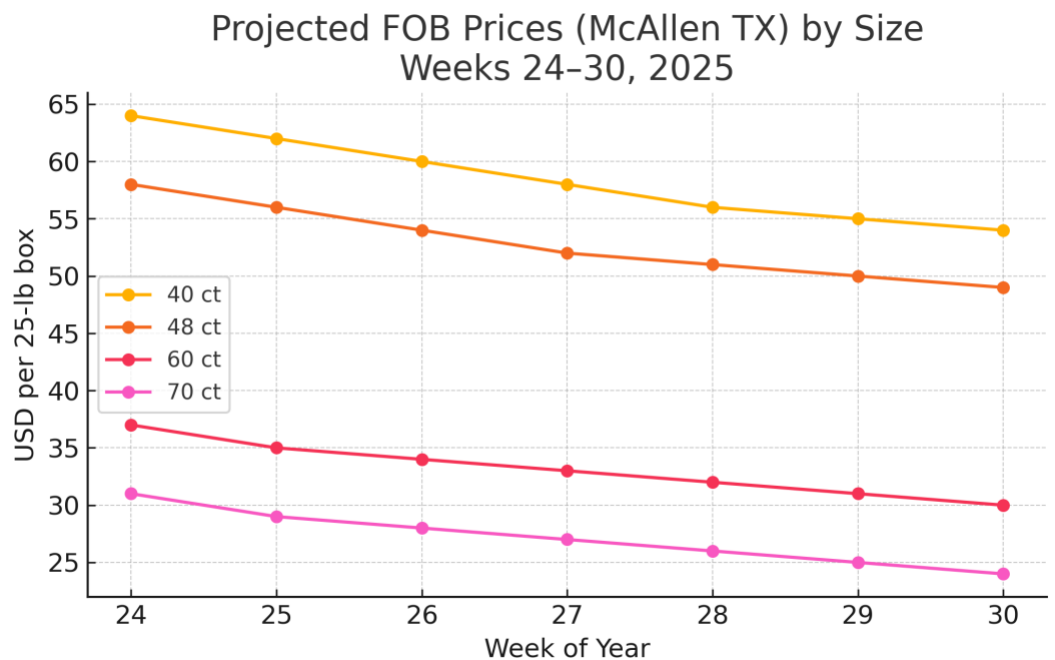


Plans & Estimates

Buyer Action Plan

- **Take advantage of abundant mid-size fruit** from California and Peru to build value-driven programs or retail promos; shippers may offer volume incentives to keep product moving.
- **Rotate and audit inventory closely**, focusing on any lots over 10 days old, as summer heat increases ripening risk and potential quality claims.
- **Plan early for late-July ads** by locking in promotional pricing while FOBs remain under pressure, coordinate ad windows with ripening room schedules.

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