

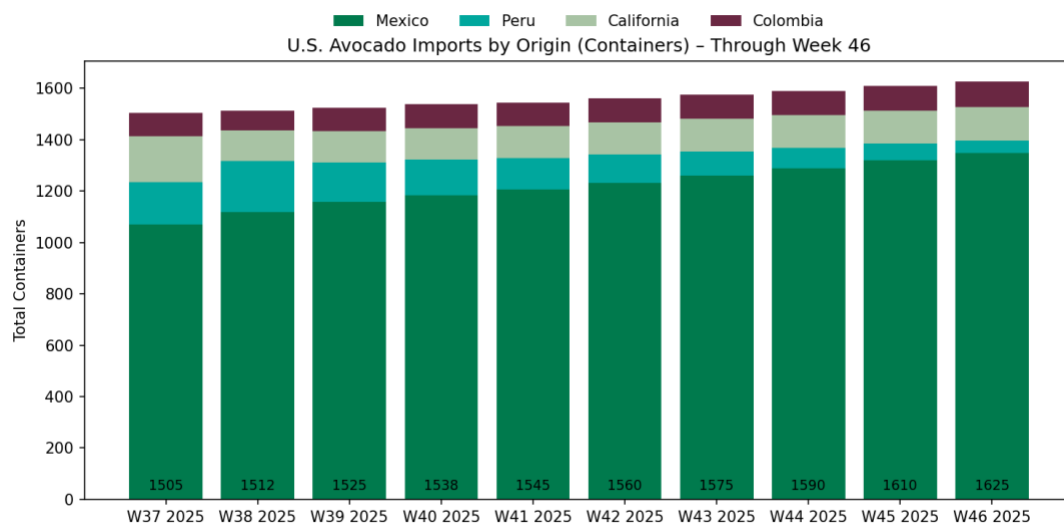
US Hass Avocado Market

Market Snapshot

Supply Origin

- In Week 46, the U.S. Hass avocado market remains **well supplied, stable, and firmly anchored by Mexico**, with a familiar split between softer mid-size pricing and firmer large-fruit premiums. Mexican harvest volume continues at strong levels, and crossings through Texas and key coastal ports are reliable, keeping 48s, 60s, and smaller sizes readily available. Mid-size fruit pricing remains attractive and relatively steady versus recent weeks, allowing retailers and foodservice buyers to sustain promotional activity without triggering significant market volatility. Large sizes (32–40s) remain comparatively tighter and continue to command a premium, as demand from certain retail specs and higher-end foodservice applications focuses on bigger fruit. Peru and California are still fully out of the commercial mix, and Colombia's presence remains modest but consistent, providing helpful mid-size support into East Coast ports. Movement through major U.S. terminals is solid, supported by normal seasonal demand and stable ripening supply. Overall, Week 46 carries a **steady, slightly buyer-leaning tone**, shaped by strong Mexican supply and continued value in mid-sizes.

Supply Origin & Changes



Overall import tone – Stable, fully covered

- Total arrivals broadly in line with Weeks 44–45.
- Mid-sizes remain soft/stable, large fruit firm and premium.
- No major port, weather, or freight disruptions reported (directional).



Supply Origin

Buyer Action Plan

Mexico – Strong volume, overwhelmingly dominant

- Likely ~90% of total U.S. imports (directional).
- Fall harvest remains in full swing, with steady crossings via Texas and West Coast gateways.
- Deep availability on 48s, 60s, and 70s; 32–40s available but comparatively tighter.
- Quality and pack consistency remain dependable across major shippers.

Colombia – Steady, secondary contributor

- Stable single-digit share of national imports.
- Useful mid-size support into East Coast and some Gulf ports.
- Treated as supplemental supply rather than a primary origin.

Peru – Fully exited

- No commercial arrivals for Week 46.
- Not available for programs, spots, or promos.

California – Domestic season finished

- No meaningful contribution to national supply.
- Any remaining fruit is purely local or residual and not market moving.

Buyer Action Plan

- **Keep 48s & 60s as your main volume and promotional workhorses.**

Mid-size pricing is still favorable and stable, making Week 46 a strong window for price-forward retail ads, menu features, and reinforcing coverage for high-volume ripening programs.

- **Base all serious programs on Mexico.**

Mexico remains the only origin with the size distribution, quality, and volume to support consistent weekly specs. All multi-week or holiday-front planning should be built on Mexican supply assumptions.

- **Exclude Peru and California from forward planning.**

Both origins are fully out for this period. Any isolated fruit should be treated as opportunistic, not as a backbone for programs or promotions.

- **Use Colombian fruit tactically to support East Coast mid-size programs.**

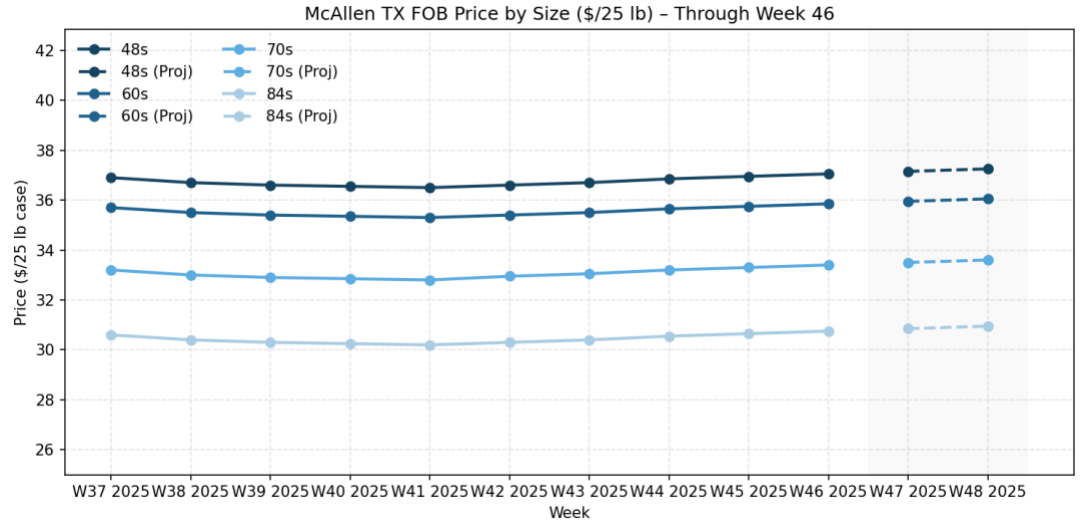
Colombian arrivals are a useful tool for fine-tuning 48/60 coverage into Eastern and some Gulf ports, helping smooth gaps or add flexibility without overcommitting to additional Mexican loads.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Final Thoughts

Week 46 ends with a **stable, Mexico-dominated market** that continues to offer compelling opportunities on mid-size fruit while maintaining firm premiums on larger sizes. Mexican harvest volume and quality remain reliable, providing the consistency buyers need as late-fall and early holiday demand builds. Peru and California are fully out of play, and Colombia continues to act as a steady but clearly secondary source of mid-size support on the East Coast. The key takeaways this week are the ongoing value and stability in 48s and 60s, the necessity of building all meaningful programs around Mexican supply, and the advantage of short, tactical promotional windows that track Mexico's evolving size mix. Larger fruit remains comparatively tight and should be protected with clear, tiered pricing. With logistics functioning normally and no major supply shocks on the radar, Week 46 presents another predictable, buyer-friendly environment for strategic avocado purchasing.



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