

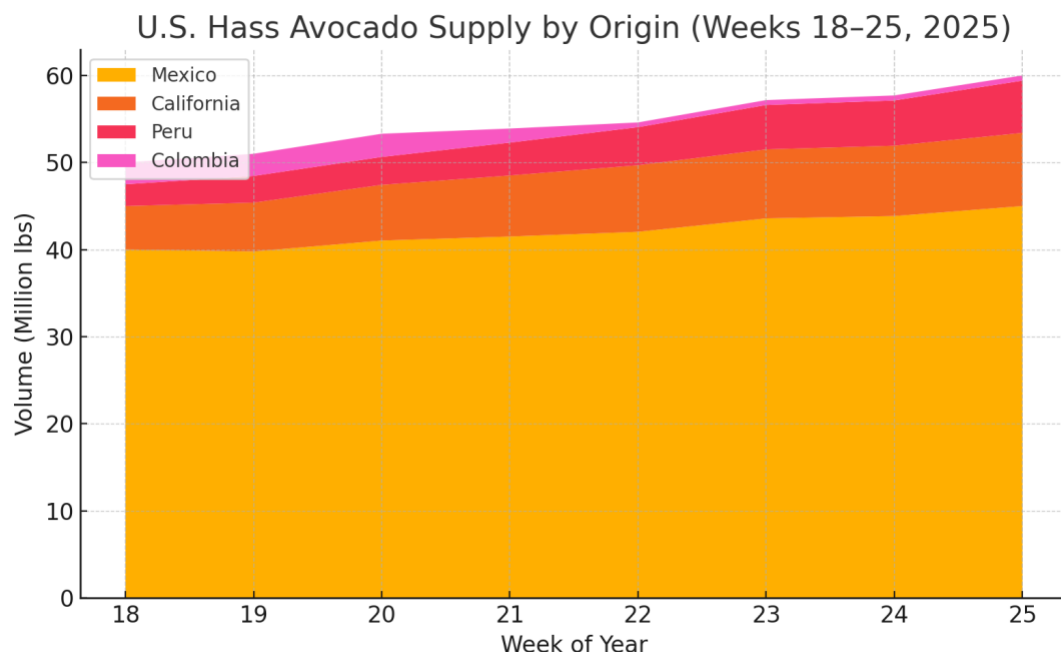


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US Hass Avocado Market

Market Snapshot

- U.S. avocado arrivals surged approximately 6 % week-over-week—reaching around 60 million lbs—with year-over-year volume up 18 %. Mexico remained the dominant supply source, while Peru, California, and Colombia also contributed. Steady pricing continues, though rising inventories and slowing Father’s Day demand are starting to exert downward pressure on the large-fruit market.



- **Origin Mix:** Still Mexico-led, but shares from **Peru, California, and Colombia** are increasing as peak seasons shift.
- **Volume:** Up ~6 % vs. Week 24, driven by carry-over loads and early Peru pace; YTD volumes exceed 2024 by ~18 %.
- **Market Sentinel:** Despite steady FOB prices, easing demand post-Father’s Day coupled with rising stocks is softening large-size bids.

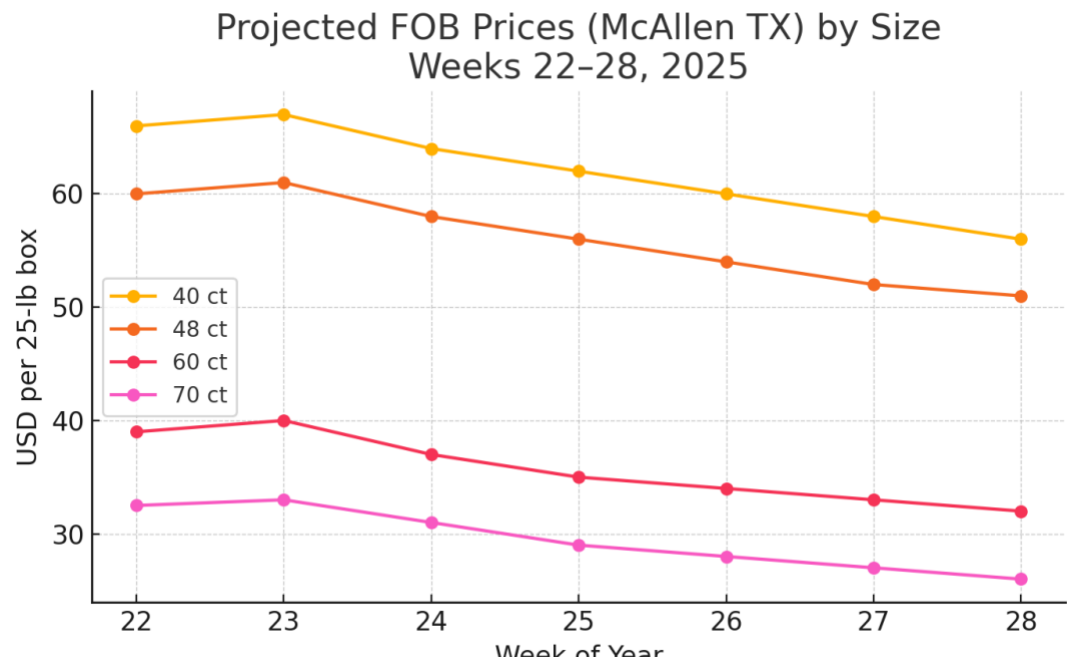


Plans & Estimates

Buyer Action Plan

- **Watch aging inventory levels:** Request packer age reports—avocados held more than 7–9 days in ambient storage are at elevated risk for quality claims.
- **Lean into 60s/70s promotions:** With mid-size fruit becoming oversupplied and Peru skewing small, negotiate ad support or bundling deals while pricing leverage is high.
- **Tighten price targets on large fruit (40s/48s):** With Father’s Day over and inventory building, push for \$1–\$2 discounts on 48 ct FOB pricing if volumes hold near 60M lbs.
- **Check Peru and Colombia labels:** Confirm incoming fruit is from APHIS-approved orchards/packinghouses and that phyto declarations match systems-approach standards.

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