

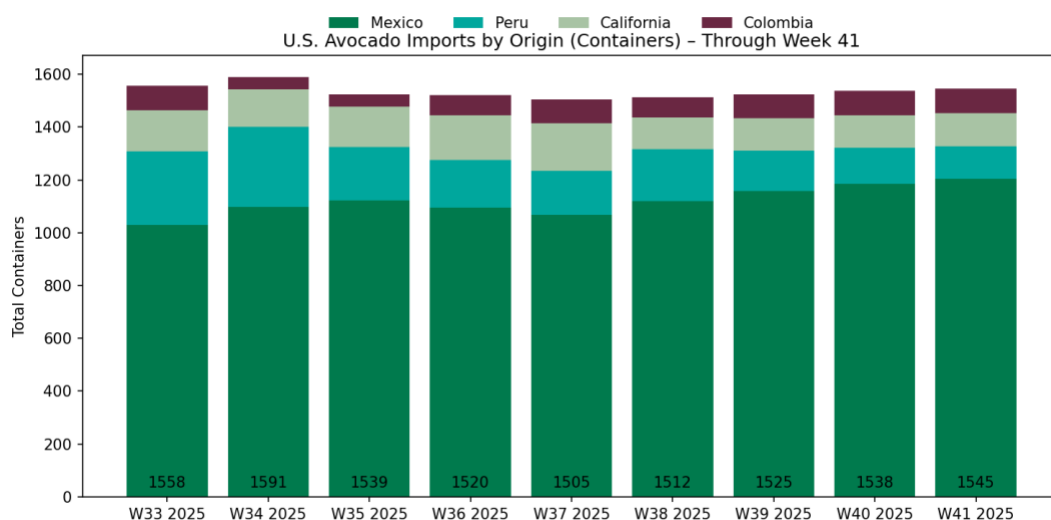
US Hass Avocado Market

Market Snapshot

Supply Origin

- Week 41 continues the pattern of a **steady, well-supplied, and largely Mexico-driven market**, with pricing on mid-sizes remaining soft and movement holding strong across major distribution hubs. Mexico increased volume again this week as fall harvest patterns accelerate, further cementing its position as the overwhelmingly dominant origin heading into late October. Mid-size fruit (48s and 60s) continues to offer some of the best value seen this quarter, maintaining attractive price levels and providing buyers with promotional flexibility. Larger sizes remain tighter, with 32s and 36s showing a firmer tone and maintaining a meaningful price spread over mids. Peru and California are now effectively out of play, leaving Colombia as the only meaningful secondary contributor, mainly supporting East Coast mid-size programs. Demand across retail and foodservice remains consistent, and terminal markets are reporting stable movement with no disruptions. Overall, Week 41 maintains a **buyer-favorable, stable-to-soft tone**, supported by strong Mexican supply and predictable logistics.

Supply Origin & Changes



Overall Import Tone – Balanced and steady

- Total arrivals are stable versus Week 40.
- Mid-sizes continue to show price pressure, large fruit firmer.
- No meaningful logistics or port delays reported.



Supply Origin

Buyer Action Plan

Mexico – Growing volume, fully dominant

- Now providing **80–85%+ of total supply** (directional estimate).
- Strong flow through Texas and West Coast ports.
- Excellent availability on mid-sizes; slightly lighter on large fruit.

Peru – Season completely finished

- No meaningful arrivals remaining.
- Not suitable for any program or promotional planning.
- Any residual fruit should be considered opportunistic only.

California (Domestic) – Finished

- Domestic season concluded.
- Remaining fruit tied to local/regional partners only.
- Zero impact on pricing or sizing availability.

Colombia – Steady supplemental support

- Continues to contribute small but reliable mid-size volume.
- Mainly useful for East Coast programs.
- Quality consistency remains stable.

Buyer Action Plan

- **Continue exploiting the strong value in 48s and 60s.**

Mid-size pricing remains highly favorable and is still tracking far below last year. This makes Week 41 an excellent period for short-term ads, foodservice coverage, or strategic inventory builds for programs with ripening flexibility.

- **Build all core coverage around Mexico.**

Mexico is the only origin with volume, consistency, and full size range needed for stable weekly programs. All longer-range plans should assume Mexico as the primary supply source.

- **Avoid dependence on any remaining Peru or California fruit.**

Both origins are now fully off the table for promotions or structured planning. Any remaining fruit is limited, inconsistent, and should not be incorporated into ads or multi-week commitments.

- **Use Colombian fruit to strengthen mid-size programs on the East Coast.**

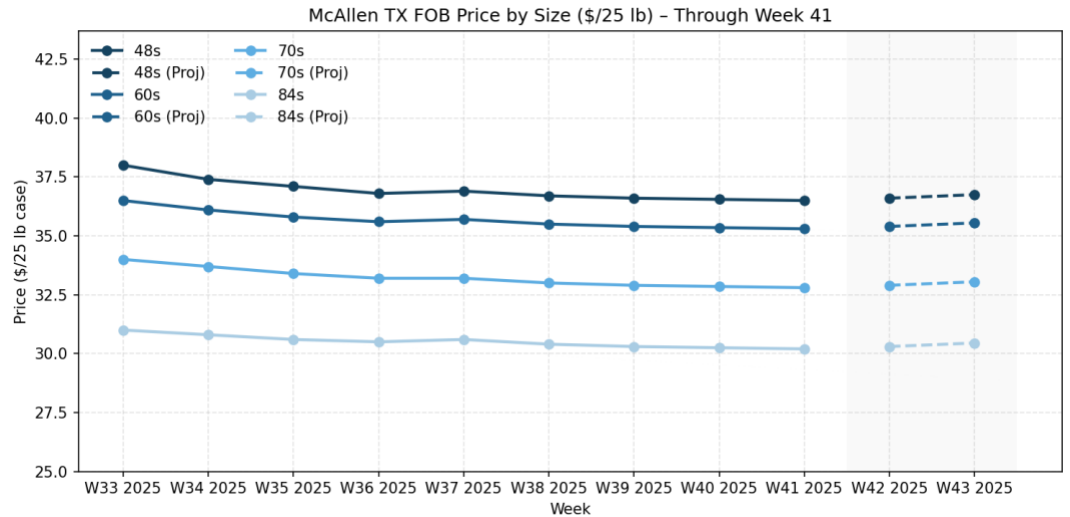
Colombian supply remains steady and can help fill gaps where ports or forward DCs experience tighter availability. Useful for smoothing week-to-week fluctuations without overcommitting to Mexican volume.



Future Estimated Curve McAllen TX

Estimated Curve

Conclusion



Conclusion

Week 41 concludes with a highly stable, Mexico-dominant market where buyers continue to benefit from exceptional value on mid-sizes. Mexico's accelerating fall harvest ensures consistent volume and dependable sizing, while Peru and California have fully exited and Colombia remains a secondary but helpful source for East Coast mid-size support. The most important takeaways this week are the enduring value in 48s and 60s, the need to anchor all major programs in Mexico for reliability, and the importance of keeping promotions short as sizing mixes adjust with increasing Mexican volume. Larger fruit remains comparatively tight, so buyers should use tiered pricing and protect premiums on 32–40s. With no supply disruptions or logistical concerns on the horizon, Week 41 continues to offer a buyer-friendly landscape with strong opportunity in the mid-size segment.



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