

The 2025 Season Was a Matter of Timing

When to pick your crop and sell it has always been one of the most important decisions a California avocado grower can make, but the grower price fluctuations in the 2025 season illustrated that point as clearly as any year in recent memory.

The season started early with good markets, good movement and strong grower pricing. The second half of the marketing year – from early summer to the mid-October end of the California season – was not so advantageous for growers. As is typically the case, the culprit was the uneven supply and demand equation.

“There was a lot of fruit in the marketplace throughout the summer and into the fall,” said Peter Shore, vice president of product management for Calavo Growers Inc., speaking to *From the Grove* in late September. “There were four countries of origin – California, Peru, Colombia and Mexico – which each had good-sized crops. The market was at a low level and it is still there as California finishes up.”

He revealed that Calavo was still harvesting and packing California fruit and would continue through week 42 (Oct. 13-19). While imports from Peru were all but done, he noted that reports from Mexico about its 2025/26 crop indicated growers have a good volume

crop, very similar to 2024/25. Shore expects that Mexico will export significant volumes in the coming months that will tend to keep the FOB market at the low end of the spectrum. “It’s difficult to predict past February but I believe through February, Mexico will supply the (U.S.) market with a lot of fruit. They are estimating 2.5 billion pounds (to the U.S. market) for the year.”

Keith Barnard, who is senior vice president, global sourcing for Mission Produce, also weighed in on the current season via email: “The 2025 California season brought varying outcomes for growers across the state, due to differences in growing practices, geographic location, weather, and the alternate bearing nature of the crop,” he said. “Unfortunately, many growers were impacted by this year’s heat and wind events, which impacted this season’s overall production potential. That said, although the crop is projected to finish lighter than last year, per acre yields are in line with historical averages.”

Gary Clevenger, managing member of Freska Produce International, also agreed that for California growers the 2025 season was a tale of two different scenarios. “The front end of the season was good,” he said. “Quality was excellent and volume was up. And the best part was that returns to growers

were very good for most of the people who picked early.”

However, Clevenger noted that the entry into the U.S. market of big volumes from Peru in early summer drove the FOB prices down very quickly, which resulted in much lower field prices as well. He pointed out that although California fruit is marketed almost exclusively west of the Rockies while the avocados from Peru stay largely in the other half of the country, the entire market suffers the consequences of the oversupply. “The result was cheap fruit and the market is still very low.”

As October began, Clevenger said 40s from Mexico were selling for \$27 per carton at the U.S. border while anything smaller was in the low \$20s at best. “Usually, we see a bump in the market once Mexico’s shipments decline in the summer, but that did not happen this year. It was not a typical year,” he said, but bemoaned that the summer of 2026 could be similar if large volumes of fruit from Peru and Colombia again come into the U.S. market.

The Freska executive said the extended period of low FOB prices has not been accompanied with corresponding low prices at retail. “The market price has been ridiculously low, but retail prices have been fairly high so we haven’t gotten the (retail) movement we



would have expected.”

He added that retail prices usually do lag behind a falling FOB price, but indicated prices have been low enough for long enough to warrant lower in-store pricing.

What’s on Deck for California in 2026

While this report was being written, the California Avocado Commission was amassing data from growers and handlers to put out its preseason estimate for California’s 2026 crop.

Clevenger expects a 10-15 percent increase in volume, which would mean a crop in the neighborhood of 350 million pounds. He reasoned that over the last few years California growers have continued to plant new groves and increase the total avocado acreage and this spring saw a good bloom, good fruit set and good weather. “We always have wind events in December to February that reduce the volume, but I would expect a crop larger than this year, which also lost some fruit to wind.”

Despite this past year’s challenges, Clevenger remains bullish on the California avocado industry. He said worldwide consumption continues to increase and while avocado supply

in any given period might not align with demand, thus causing the immediate price to drop, overall, the trend is good. “We see big swings that I can’t start to understand – there are economic reasons that are beyond me – but growing avocados is still a good business.”

Shore of Calavo also expressed optimism about the 2026 California crop. He pointed out the Calavo crop estimators were still in the groves estimating next season’s volume, but a crop between 350 and 400 million pounds for 2026 seemed reasonable. Because of Mexico’s expected export volume of 2.5 billion pounds, Shore was not anticipating a lot of California fruit would be marketed before March. “I think we will see some fruit in March, but April, May and June will probably be our peak months...but it does depend on supplies out of Mexico in the spring.”

Another factor that will play a significant role is the strength of the European market during the spring of 2026. Both Peru and Colombia have been developing that market and would like to divert a significant portion of their fruit to Europe. But if that market is weak, those producers tend to turn to the United States, which remains

the number one avocado market in the world.

Shore said there is no doubt there was “too much fruit” in the U.S. market during the summer and he hoped that scenario is not repeated in 2026. However, he expressed confidence that the U.S. market can consume more than 3 billion pounds, which is definitely on the near horizon, according to the Calavo executive. “We have always seen good consumption in the West and Texas and now the Northeast continues to grow and the Southeast is also a growth market for avocados. In fact, the per capita consumption in Florida exceeds California.”

Shore said Avocados From Mexico, the promotional group charged with increasing consumption of avocados from that country, have done a very good job and continue to push programs to grow the category. Florida and the rest of the Southeast have received a great deal of attention from AFM especially during the fall football season.

Of course, expanding the consumption of avocados in all parts of the country bode well for California growers, just as a rising tide elevates all boats. 🥑