

California Crop Poised for Strong Spring Movement

California avocado handlers are expecting another strong season with close to 350 million pounds of production, with marketing experts counting on solid late spring/early summer demand to move the crop.

"For budgeting purposes, the California Avocado Commission has estimated the crop at around 325 million pounds," said Peter Shore, Calavo Growers Inc.'s Vice President of Product Management. "From our perspective, we think the crop will be closer to 350-360 million pounds."

He further noted that the most likely timing of the picking and marketing of the 2026 California crop will be in the April/May/June time frame. But Shore said that, in all likelihood, there will be some fruit marketed before that and well into the fall. "They are still harvesting fruit from the 2025 season," he said on December 23.

Shore noted that every grower has their own unique situation, which results in a wide range of harvest timing. But he stood by his prediction that late spring into summer will most likely be the sweet spot in 2026.

Informing that opinion is the current marketing dynamics and the projected size of Mexico's export crop for its 2025/26 season, which officially began on July 1, 2025 and will last until

June 30, 2026. "APEAM (Mexico's avocado grower association) has estimated an export crop of 2.5 billion pounds, which would be close to an all-time record," Shore said.

He added that the production and selling of the current Mexican crop is ahead of schedule with export volumes to the United States averaging between 55-60 million pounds each week throughout the fall. That level of volume has kept FOB prices on the low end of the spectrum, but it is also helping Mexico significantly reduce its available supply going into the typically heavy winter/spring marketing period. January is often the most voluminous month for shipments from Mexico in the runup to the "Big Game" weekend (February 7-8, 2026). Cinco de Mayo (May 5) is the spring promotional period that typically garners the most sales.

Shore expects most California growers to wait until April to start picking in anticipation of stronger pricing. He did note that the release date for California growers to pick 48s and larger was set for December 28, only a few days after this conversation was held. "But I don't think we will see very much fruit until late February at the earliest," he said, observing that there are always some growers that pick early for cultural reasons.

In past seasons, such as last year, a

very strong market in January and February also led to early picking. "Because of the current pricing situation, I don't think we will see that happen this year," he added.

On this particular late December day, it was raining in Ventura County as well as in other California avocado producing regions, which Shore said was very good for the fruit. "Rain is good; we welcome it right now," he said. "It helps with sizing. We have received some good rain while the temperatures have been mild and warm...that's good for the fruit."

Shore is anticipating a typical size curve for 2026 with the crop peaking on 48s and 60s, the most popular sizes for the majority of U.S. retailers.

The Calavo executive also expressed optimism about other weather conditions that bode well for growers. "As of yet, we have had no Santa Ana wind events, nor have we had any freezes," he said, while reminding that wind events and freezing temperatures can still potentially impact the size of the crop through February.

Shore also said the world avocado marketing situation looks like it could help California growers in 2026. Europe has had a strong market, which has given Colombian avocado growers a home for their fruit this fall and winter. "The market has been better in Europe

(than the United States) so Colombia has sent very little fruit here.”

Peru has long considered Europe to be its top market as it is the leading avocado supplier for that continent. If the European market remains strong through the spring, one would expect Peru to capitalize on that situation as its fruit matures in mid-to-late spring.

Returning his attention to California, Shore said growers remain bullish on the Golden State’s ability to compete as the acreage continues to increase with new plantings. Shore revealed that the state’s total avocado acreage now tops 55,000 acres with more than 3,500 acres identified as “young trees.”

John Dmytriw, vice president of business development for Index Fresh, also is very optimistic about the future for the California avocado grower. “California avocados are the Porsche of the category,” he quipped, noting that there will be a strong market for the state’s production whenever growers are ready to pick. He added that there is a very strong demand from retailers who want to start selling California avocados as soon as they can and stick with the crop as long as they can each year, also noting that some 2025 avocados were still being sold as he talked on the second day of 2026.

“I expect that there will be some growers who begin harvesting after the Super Bowl and the volume will continue to increase through March and April,” he said.

Dmytriw noted that both marketing conditions and labor availability will enter into the equation. He recalled that in 2025, the FOB market for avocados was very strong through the first quarter of the calendar year. “As a point of comparison, at this time last year (January), 32s, 36s and 40s were selling for \$60 to \$70. Today, they are only \$23-\$28.”

The Index Fresh executive added

that the decline in the FOB price began after week 13 in 2025 and continued for the rest of the year. “I have never witnessed such a long, continuous, steady decline in my career,” he remarked, adding that the market has plateaued and he does expect the FOB price to start to climb again.

He said the retail price on avocados is reflecting the low FOB price and movement is very good with a lot of promotions. Dmytriw believes this will produce big sales numbers throughout January and into February, leading to a more favorable situation when some California fruit enters the market. “Instead of a retail of \$2.99 and \$3.99 (per avocado), which is not in the budget of many shoppers, we are seeing lower prices and good movement. That should bring more consumers back into buying avocados,” he said.

“At Index we are fairly aligned with the industry’s forecast for California fruit,” he said. “We expect about 350 million pounds of Hass with about 10-12 million pounds of GEMs and 10-12 million pounds of Lamb Hass.”

Dmytriw noted that the strong rainfall in December and continuing into January bodes well for the fruit. “It should impact the size of the fruit and give us considerable volume of large fruit to sell this year,” he said. “We believe there will be a lot more 48s and larger. The rain is also giving us a good, clean crop.”

He reiterated that California avocados have a cache that avocados from other points of origins do not have. While Dmytriw expects exporters of avocados from both Peru and Colombia to continue to increase their volumes to the U.S. market, he doesn’t believe they can deliver the quality and taste that California growers can achieve. “At Index, we are pretty enthusiastic about the future for California growers,” he said. “It is why we continue to invest in our

growers with seminars to help them increase yields and improve their cultural practices. We believe one day soon, we will again see 400-500-million-pound crops from California.”

Gahl Crane, sales manager at Eco Farms Avocados, Temecula, CA, had the advantage of weighing in on the current avocado marketing situation after the holidays. “Right now, we are seeing a bit of an upward trend,” he said on January 5. “We hope that it’s going to continue to go higher and we’ll see good pricing in the spring.”

A rising January market wasn’t totally unexpected as the holiday season reduces the number of picking days in Mexico, which naturally reduces the overall volume coming in from south of the border. Nonetheless, Crane said it is a positive sign and combined with increased promotions and all of the potential party events in the new year, it could signal more than just a temporary strengthening of the avocado market. January also brings a renewed interest in healthy eating, which also tends to give avocados a consumption boost.

Like the other handlers interviewed, Crane expects California avocados to be marketed heavily from early spring through mid-summer. But he did note that each grower has his or her unique circumstances that inform their own go-to-market timing. And in the same vein, each season also has its own factors that come into play.

As a case in point, Crane noted that the 2025 California avocado season was quite different than most. A strong early market led to a lot more fruit being picked during the first quarter of the calendar year than is usually the case. Yet, California also sent more fruit to market in the last month of the year than has occurred in many years. 🍌