

November 2021

# 2021 Industry Report: Colombian Avocado



# Executive Summary

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- In 2020, Colombian avocado exports value increased by 64% from the previous fiscal year, along with a 40% increase in volume.
  - Over the first five-month period in 2021, Colombian avocado exports rose by 88% reaching USD 114.3M due to a rise in global demand.
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## Production

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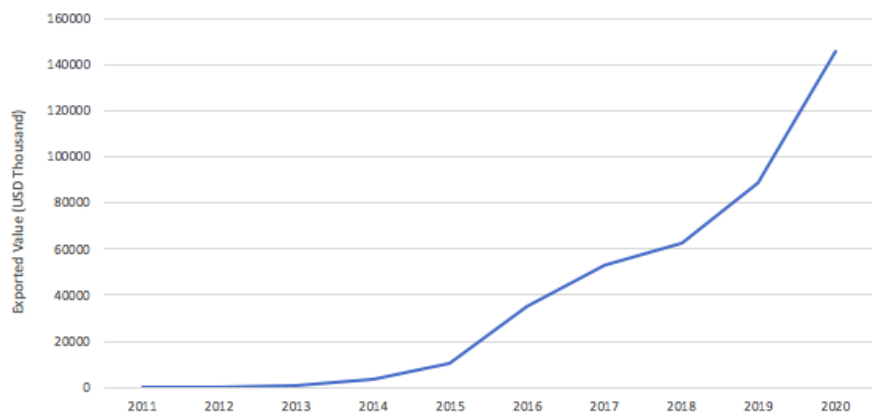
- Avocado Production in Colombia increased by 19% from the previous year in 2020, reaching 638,6000 MT.
  - Production in Colombia has continuously grown year by year since 2016, with an 81.74% growth over the last three years.
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## Exports

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- In 2020, Colombian avocado shipments to the United States increased by 46% compared to 2019. The US market represents the largest potential for Colombian avocados but phytosanitary and stringent customs requirements remained as the main entry barriers.

**Colombia Total Exports of HS Code 080440: Fresh or dried avocados**



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## Part I

# Colombian Avocado Product Information

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1.1 Varieties

1.2 Seasonality

1.3 Supply Chain

# Colombian Avocado Product Information

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Avocados are divided into three different origins:

1. Mexican (Persea Yankee fables variety drymifolia)
2. Guatemalan (P. Yankee folklore assortment Guatemala)
3. West Indian (P. History of the U.S. grouping Yankee folklore) races, with more than 1,000 cultivars
4. between them.

In Colombia, avocados are produced from sea level up to 2,200 meter high. Production is primarily focused to meet domestic demand. However, in recent years, strong export potential has made producers aware of the international market. Because of its agro climatic conditions, Colombia has positioned itself as a large producer, not only of fresh and dried avocado, but processed products as well.

Colombia is a tropical country that lends itself to growing different types of avocado, in various regions such as Tolima, Antioquia, and Eje Cafetero; It should be noted that each type requires specialized care that guarantees success in the production process.

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## Varieties

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Main varieties of avocados that are grown in the country are:

### Hass

The Hass avocado is currently one of the most important varieties and Colombia is emerging as one of the main exporters of this fruit.

The flavor is strong and the substance is velvety which makes it ideal for guacamole. Hass avocado trees have high yields, and a mature tree can produce over a million blooms. Unlike other avocados, which are characteristic for their smooth and green skin, the Hass avocado fruit has dark green, bumpy skin that darkens when ripe, eventually reaching a darkish black shade.


Hass avocados are richer in fat than other varieties, which gives them a stronger taste and smooth, creamy texture. The Hass variety makes up 80% of global consumption, and 95% of US consumption.

	<p><b>Specifications:</b></p> <p>Shape: Oval Skin Color: black when ripe Skin Thickness: medium Fruit Surface: pebbly Flesh Recovery: 70% Fruit Weight: 180-350g Maturity: mid-season to late</p>
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**Lorena**

The Lorena avocado, also known as “papelillo”, is one of the most distinguished varieties, since it has a great presence in marketplaces and stores. Its shape is elongated, medium-large size, dark green color, and smooth skin with shine.


One of the advantages of this variety is that it gives two harvests in the year (in the first quarter and in the last half of the year). The behavior of the crop has great performance in areas with low altitudes, however, it can also be cultivated in warm areas such as the Eje Cafetero and Tolima.

	<p><b>Specifications:</b></p> <p>Shape: Elongated Skin Color: Dark Green Color Skin Thickness: Smooth Skin with Shine Fruit Surface: pebbly Flesh Recovery: 70% Fruit Weight: 200-350g Maturity: mid-season to late</p>
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Reed

The reed avocado is recognized for its quality and high resistance to damage during its various stages of transport, storage, and handling. Reeds are characteristic for their round shape, thick skin, and dark green color scheme at maturity.

This variety grows well in cold climates as long as air currents are weak, since the tree is sensitive to strong wind. Reed avocados are renowned for productive growth, and thus must be periodically pruned so the tree does not reach a height that makes harvesting difficult.



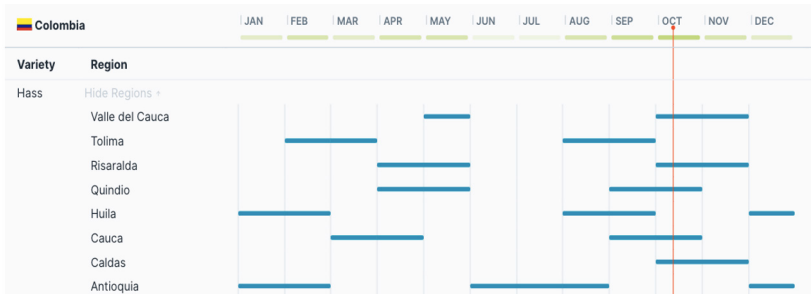
Specifications:

Shape: Round  
Skin Color: Dark Green  
Skin Thickness: Thick Skin  
Fruit Surface: pebbly  
Flesh Recovery: 70%  
Fruit Weight: 165-320g  
Maturity: mid-season to late

Seasonality

Colombian avocados are produced almost all year round, if not at least 10 out of the 12 months.  
Colombian growers harvest avocados through two harvesting seasons:

- October to March** is the main seasonal window that represents 65% of the total harvest.
- The second season starts in **May** and ends in **August**, representing 35% of the total harvest.



## Supply Chain

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### Farm → Packing House → Agents → Exporter → Buyer

Managing a stable supply chain of avocados is relatively complicated compared to other fruits:

- Avocados mature on the tree – but they will not ripen. The amount of time it takes to ripen can vary from days to weeks. This depends on the degree of maturity before they are plucked from the tree, storage temperature, and the variety of avocados.
- During transport, it is important to ensure the cold chain of avocados is not broken and the container maintains its temperature of at 1 degree Celsius climates (by either land, air, or sea). At the same time, the transporting temperature should not be too low, because it will result in the fruit shrinking in size.
- On the other hand, excessive exposure to sunlight can also lead to the fruit overripening and rotting very quickly. This means that avocados supply requires extra careful attention at all stages of the supply chain in order to provide customers optimal quality fruit.

### Packaging House

- Big packing houses typically own both farms and multiple smaller packing houses.
- Medium-sized packing houses own packing houses and a share of the farm.
- Avocados come in 3 standard packaging types: 4kg carton, 6kg carton, and 11.3 kg carton.
- Usually, the carton boxes show how many avocados are in the box. The 6kg carton goes to China and Japan, and the 11.3kg carton is delivered to the US market.
- In general, the bigger the container is, the cheaper the cost is. The 4kg carton box is currently in shortage because factories have shut down as a result of COVID-19. For the EU countries, 10kg plastic boxes are used.

### Shelf life

Due to their short shelf lives (of about 30-40 days), avocados are typically harvested 1 week prior to loading. Since avocados are shipped out in mixed distribution, with medium sizes being most abundant, suppliers have to tap into other suppliers' stocks if customers require specific size. There seems to be no strong bond between suppliers.



## Part II

# Global Market Dynamics

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2.1 Production

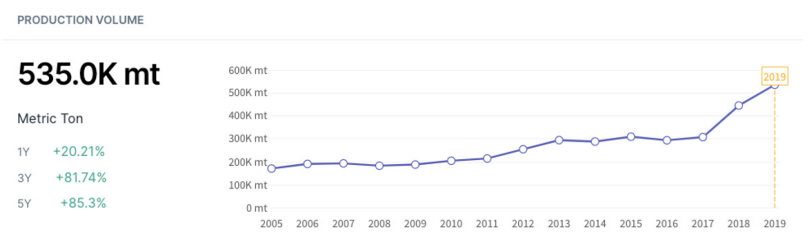
2.2 Consumption

2.3 Exports

# Global Market Dynamics and Outlook

## Production

- In 2019, Colombia was the fourth-largest producer of avocado in the world with 535,000 MT produced with 63,534 hectares of harvested area.
- By 2020, production of avocado in Colombia amounted to nearly 638,600 MT, an increase of 19% from the previous year.
- Production in Colombia has continuously grown year by year since 2016, with an 81.74% growth over the last three years.



	2015	2016	2017	2018	2019	2020
Planted Area (Ha)	57.826	64.1	69.837 7	76.897	84.587	93.045
Planted Area (Ha)	38.359	40.981	52.013	55.777	59.681	63.859
Planted Area (Ha)	310.708	294.044	308,000	445,075	535,021	638,591
Planted Area (Ha)	8	8	7	10	10	10

Chart 1. Source: Faostat

- Approximately 25% of the production area in Colombia is dedicated to growing the Hass Variety.
- It is expected that by 2025, the total production of avocados in Colombia will reach 1 million tonnes.

## Consumption

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According to Corpohass (Colombian Cooperation of Producers and Exporters of Hass Avocado), Colombia has an approximate consumption of 6.3 kg a year per person.

While for the Hass Avocado variety, the consumption would be 500 grams per person each year.

The demand for Hass avocado in Colombia is very low when compared to other Latin American countries such as Mexico where the approximate consumption of Hass Avocado is around 11.6 kg per capita each year.

Although Hass variety enjoys an increasing international demand, its local consumption is low as most Colombians prefer the “criollo” type or the more traditional, green varieties. This allows Colombia to allocate most of its Hass variety to the exports market.

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## Exports

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Exported Value in 2020: USD 146M

Exported Volume in 2020: 77K MT

Export Value Growth from 2019: 64%

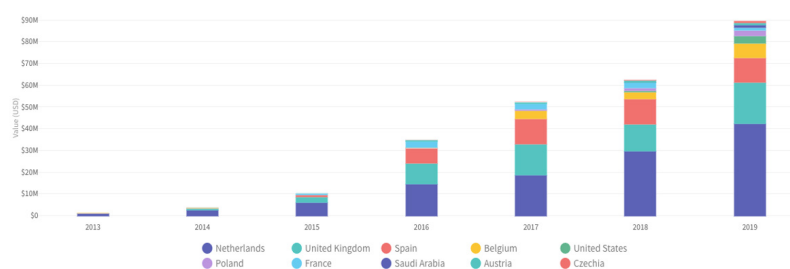
Colombia is the sixth largest exporter of avocados in the world.

- According to ProColombia, the Promotional Agency of Colombia, exports to all destinations over the first five-month period in 2021 rose by 88% to USD 114.3M.
- Colombian avocados' main market is the EU with the Netherlands, the UK, Spain and France as its main destinations. The EU (including the UK) alone accounts for 90% of all Colombian avocado exports.
- They have not yet reached the largest in the international market, the US mainly because of phytosanitary and customs requirements imposed by that country.

## Main Destinations for Colombian Avocado

World	Value exported in 2020 (USD thousand)	Share in Colombia's exports (%)	Quantity exported in 2020 (Tons)	Growth in exported value between 2019-2020 (% , p.a.)	Ranking of partner countries in world imports	Share of partner countries in world imports (%)
World	146029	100	77075	64		100
Netherlands	83513	57.2	43745	97	2	14.1
United Kingdom	18595	12.7	8897	-2	6	4.8
Spain	18118	12.4	10023	59	4	5.3
United States of America	5159	3.5	3129	46	1	34.8
France	4563	3.1	2316	224	3	7.1
Belgium	3191	2.2	1792	-50	10	1.6
Germany	2756	1.9	1484	844	5	5.3
Russian Federation	1750	1.2	704	766	9	1.7

Trends of Top 10 Importers of HS Code 080440 From Colombia



## Colombian avocado exports Trends

- The US market represents the largest potential for Colombian avocados. In 2020, exports to the US grew by 46% from the previous year.
- Exports to France and Germany also increased by 224% and 844% respectively from last year.
- The Asian market remains as one of the main new export

destinations for avocado exports where Colombia still doesn't have any meaningful participation.

## Netherlands

- The Netherlands is the main market for Colombian avocados with 57.2% of its export market share with a value of USD 83.5M in 2020.
- Since 2020, Colombia has become the second-largest source of avocados with 13.7% of the import share, after Peru who dominates the market with 30.7%.

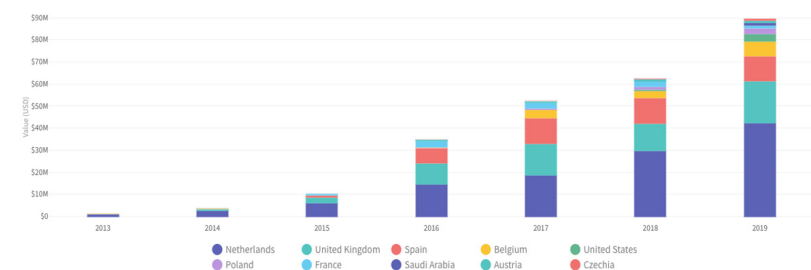
### Main Destinations for Colombian Avocado

Exporters	Value imported in 2020 (USD thousand)	Share in Netherlands's imports (%)	Quantity imported in 2020 (Tons)	Growth in imported value between 2019-2020 (% p.a.)	Ranking of partner countries in world exports	Share of partner countries in world exports (%)
World	1028335	100	351158	26		100
Peru	316270	30.8	111215	55	3	11.7
Colombia	141346	13.7	47224	86	7	2.2
Chile	131294	12.8	40880	-14	5	3.4
South Africa	88530	8.6	32202	35	13	1.2
Spain	72482	7	20770	72	4	6.8
Mexico	66522	6.5	23368	-32	1	42.3
Kenya	55582	5.4	23030	37	8	1.8
Israel	26009	2.5	7844	-27	15	1
Belgium	25953	2.5	6976	16	12	1.2
Germany	21902	2.1	8102	44	16	0.8
Dominican Republic	17882	1.7	6868	33	14	1
Morocco	15527	1.5	4516	286	10	1.7

### Netherland Import Trends:

- The Netherlands increased its imports of Colombian avocado by 86% in 2020 from the previous year.
- As the main European re-exporter, the Netherlands has increased its overall avocado imports by 26% in 2020 from the previous year.
- Chile and Mexico have both decreased their exports to the Netherlands by 14% and 32% respectively, which was replaced and offset by supply from Peru and Colombia.

Trends of Top 10 Importers of HS Code 080440 From Colombia



### United Kingdom

- Colombia is the eighth largest source of avocados for the UK with a 6.7% import share. The exporters preceding Colombia in terms of UK market share are Peru (24.4%), Chile (13%), Israel (10.2%), Spain (9.5%), South Africa (8.2%), Germany (7.8%), and Mexico (6.8%).
- The UK is an important market, as it is Colombia's second-largest export destination for avocados with a 12.7% share, valued at USD 18.5M in 2020.

### Main Exporters to the UK

Exporters	Value imported in 2020 (USD thousand)	Share in United Kingdom's imports (%)	Quantity imported in 2020 (Tons)	Growth in imported value between 2019-2020 (% p.a.)	Ranking of partner countries in world exports	Share of partner countries in world exports (%)
World	348388	100	122298	2		100
Peru	84752	24.3	33321	19	3	11.7
Chile	45225	13	14592	-36	5	3.4
Israel	35488	10.2	10505	12	15	1

Exporters	Value imported in 2020 (USD thousand)	Share in United Kingdom's imports (%)	Quantity imported in 2020 (Tons)	Growth in imported value between 2019-2020 (% p.a.)	Ranking of partner countries in world exports	Share of partner countries in world exports (%)
Spain	33236	9.5	9747	5	4	6.8
South Africa	28372	8.1	12933	10	13	1.2
Germany	27202	7.8	6928	25	16	0.8
Netherlands	24044	6.9	8134	-12	2	16.3
Mexico	23453	6.7	7878	21	1	42.3
Colombia	23149	6.6	9081	27	7	2.2
Dominican Republic	6660	1.9	2756	-19	14	1

## Spain

- Spain is the third-largest market for Colombian avocados accounting for 12.4% of the export share and a value of USD 18.2M in 2020.
- For Spain, Colombia is the fourth-largest supplier of fresh avocados with 6.2% of the import share. The three main suppliers are Peru (42.5%), Mexico (17.1%), and Morocco (12.9%).

## Main Destinations for Colombian Avocado

Exporters	Value imported in 2020 (USD thousand)	Share in Spain's imports (%)	Quantity imported in 2020 (Tons)	Growth in imported value between 2019-2020 (% p.a.)	Ranking of partner countries in world exports	Share of partner countries in world exports (%)
World	389303	100	0	14		100
Peru	165333	42.5	77057	25	3	11.7
Mexico	66570	17.1	0	-11	1	42.3
Morocco	50266	12.9	17404	143	10	1.7
Colombia	24280	6.2	11278	46	7	2.2
Netherlands	17948	4.6	10320	40	2	16.3

Exporters	Value imported in 2020 (USD thousand)	Share in Spain's imports (%)	Quantity imported in 2020 (Tons)	Growth in imported value between 2019-2020 (%, p.a.)	Ranking of partner countries in world exports	Share of partner countries in world exports (%)
Kenya	17664	4.5	8159	42	8	1.8
Chile	16898	4.3	5846	-52	5	3.4
Portugal	8104	2.1	2802	-11	22	0.2
France	4635	1.2	2030	16	11	1.4

- Spain's import value growth in 2020 was 14% from the previous year.
- Spain increased its import of Colombian avocados specifically by 46%, only topped by Moroccan avocados at a 143% increase.



## Sources

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ITC, [Trade Map](#)

FAOSTAT, [Crops and livestock products information.](#)

Tridge, [Colombian Avocado Trade Data](#)

Corpohass, [Product Information](#)

Fresh Fruit Portal. [“Colombian avocado exports nearly double through May.”](#)

Produce Blue Book. [“Colombian avocado exports nearly double in early 2021.”](#)