



2016

Country Profile: Brazil

Producer country profile produced by *CIRAD, The Centre De Cooperation International En Recherche Agronomique Pour Le Développement*.

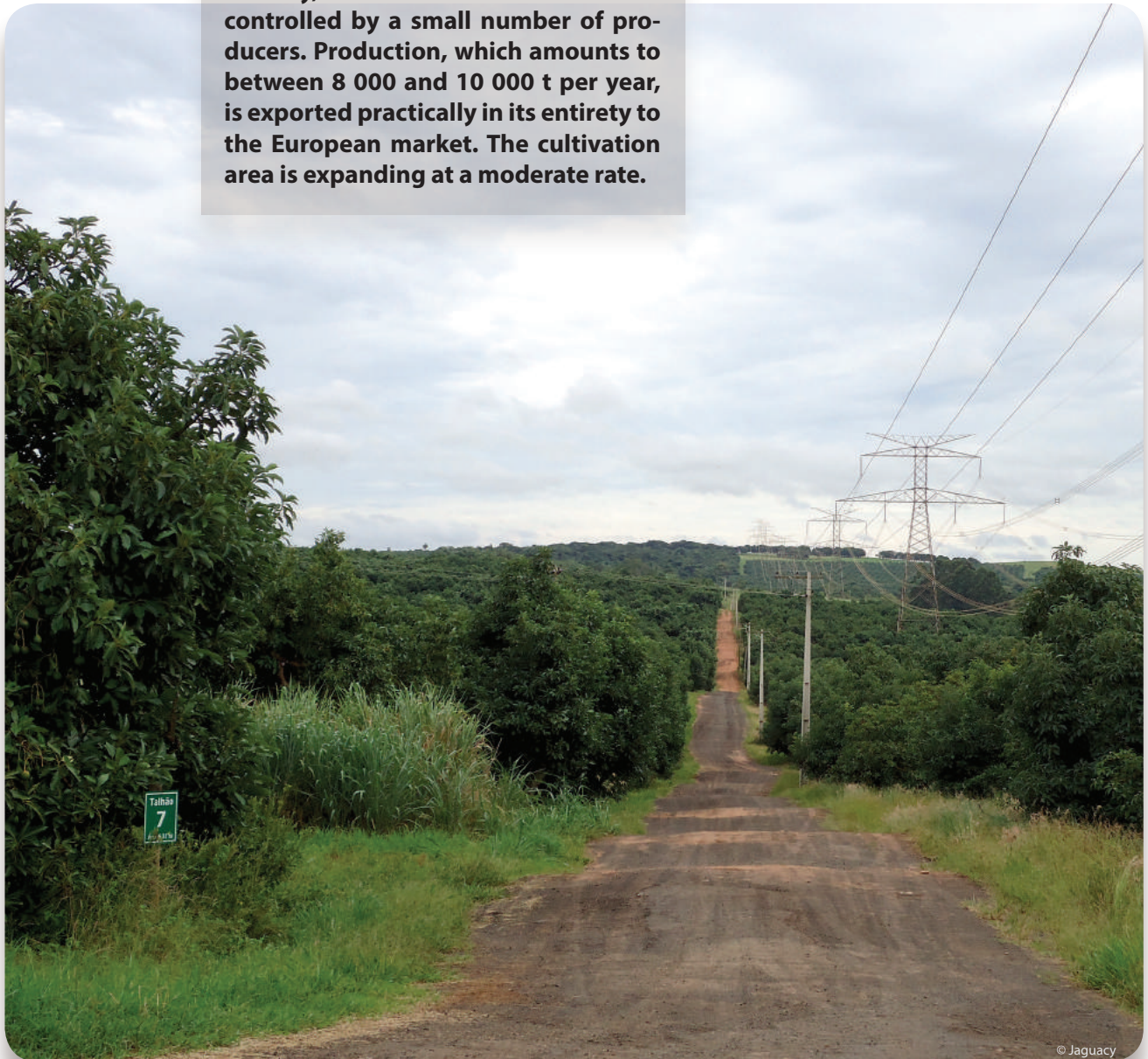


Producer country file

Brazilian avocado

by Eric Imbert and Tatiana Canturias-Aviles

The Brazilian Hass industry, which is packed into the south-east of the country, remains limited in scale and controlled by a small number of producers. Production, which amounts to between 8 000 and 10 000 t per year, is exported practically in its entirety to the European market. The cultivation area is expanding at a moderate rate.

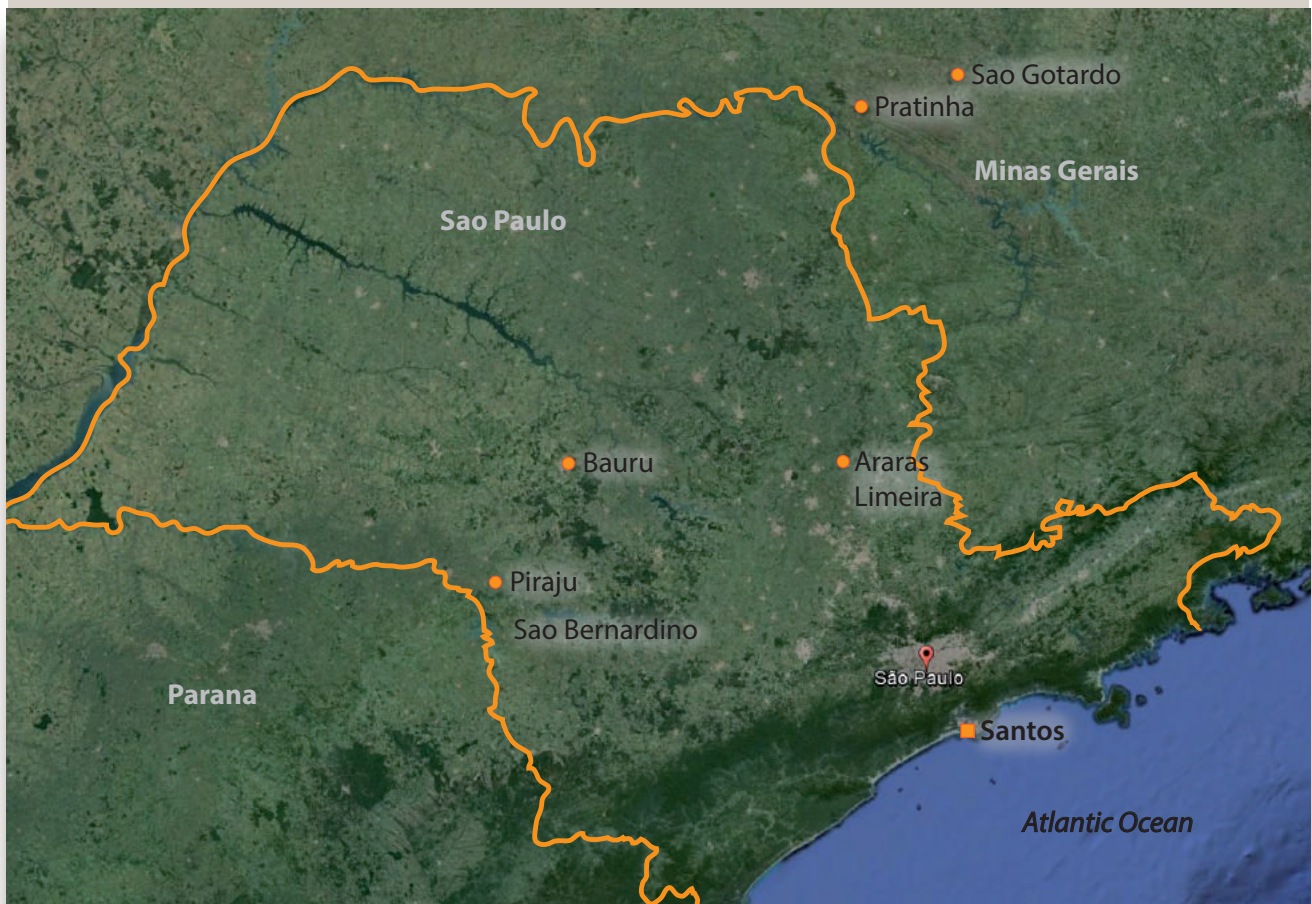


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Avocado — Brazil

Location

The Brazilian cultivation area comprises 9 600 ha situated mainly in the south-east of the country, primarily comprising hybrids of the West Indian and Guatemalan races. Hass cultivation, which covers approximately 1 500 ha, is also concentrated in this region, on the southern plateau where temperatures are cooler than on the plains. More than three-quarters of surface areas of this variety can be found in Sao Paulo State, within three main zones at an altitude ranging between 500 and 900 m. The leader in terms of surface area is Bauru (in the central part of the State), home to the plantations of the pioneer of Hass cultivation in Brazil, Jaguacy (which owns 400 to 500 ha of orchards). The other main Hass orchards in this State are situated further south (Piraju/San Bernardino, on the border with Paraná) and further east (Limeira/Araras close to the border with Minas Gerais). The rest of the Brazilian Hass cultivation area is situated mainly in the south-west of the neighbouring State, Minas Gerais, home to the plantations of Tsugue, the country's other main player (close to the River Paranaíba in the localities of Sao Gotardo and Pratinha, at an altitude of more than 900 m).



Avocado — Brazil

Production

Unlike the West Indian varieties which have been in place since the very beginning of the 19th Century, Hass was introduced late. The first plantations were set up in the early 1980s by Mr. Paulo Roberto Leite de Carvalho (Jaguacy), near the town of Bauru, in order to feed the international market. From the late 1990s-early 2000s, Hass plantations started to spread to other zones of the country, with the technical support of Jaguacy in most cases. The production of this variety amounted to between 8 000 and 10 000 tonnes in 2015. It is registering moderate growth, with surface areas expanding steadily by around one hundred hectares per year. Irrigation, a feature limited mainly to the sector leaders, is a really major challenge in this hot country. Labour availability and costs, which have risen considerably in recent years, are also limiting factors. Phytophthora, the main sanitary problem, is generally well controlled. Avocado producers across all varieties are united under the newly-established Brazilian Avocado Producers Association (ABPA).



Varieties

Brazilian production is based primarily on West Indian race varieties, or varieties derived from crosses between the West Indian and Guatemalan races. The fruits weigh in at approximately 600 g to more than 1 kg. The harvest runs year round, thanks to a range comprising five main varieties. The Hass production calendar extends from March to October. The production calendar in Minas Gerais, where the plantations have been set up in generally higher altitude zones, is a bit later than in the Sao Paulo region.

Avocado — Brazil — Harvest calendar by variety and production zone													
Varieties	Zones	J	F	M	A	M	J	J	A	S	O	N	D
West Indian	Geada												
	Fortuna												
	Quintal												
	Margarida												
	Breda												
Hass	Sao Paulo												
	Minas Gerais												

Avocado — Brazil

Exports

The first exports (Fuerte variety) were made in 1980, in order to take advantage of a break in the Israeli supply to the European market. Volumes remained very limited (less than 1 000 tonnes per season) until the mid-2000s. They have increased moderately yet steadily, reaching 4 000 to 5 000 t in recent years. Practically all volumes are still aimed at the European market, with the Netherlands acting as a hub for Northern Europe. The historic developer of the sector, Jaguacy, remains by far its main player. It owns its own packing station (Bauru), which handles both its own produce and those of associated producers (approximately 25, which have a total cultivation area of 500 ha). The two other packing stations specialised in the avocado present in the country handle more limited volumes (Tsugue in Minas Gerais State, and Ferreti in Sao Antonio da Posse, Sao Paulo State).



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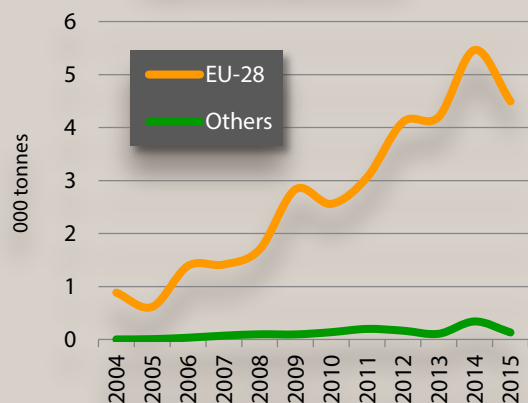


Outlets

There are two different markets: West Indian type varieties are almost entirely consumed fresh on the local market, often prepared with sugar (mousse, milkshakes). The fruits are delivered to retailers or the supermarkets in 23- or 27-kg boxes. The consumption per capita is rather limited, and waned considerably during the 2000s because of a rather unfavourable dietary image of the avocado in the country. Conversely, Hass is practically all exported. It has been available on the local market since 1997 (a difficult year for exports), but the breakthrough for the “avocado” or “abacate baby” (as Hass is nicknamed locally) has remained very limited. The sector leaders, and in particular Jaguacy, are making big promotion efforts, in particular by proposing alternative modes of consumption. Nonetheless, Hass, sold via the Sao Paulo wholesale market (CEAGESP) or directly by certain national supermarkets, remains expensive (three times the retail price for West Indian varieties according to 2012 statistics). A small proportion of volumes (sorting rejects) is processed into frozen pulp (unit owned by Jaguacy) or oil (partnership with the oil manufacturer Americana Oleas).

Avocado — Brazil

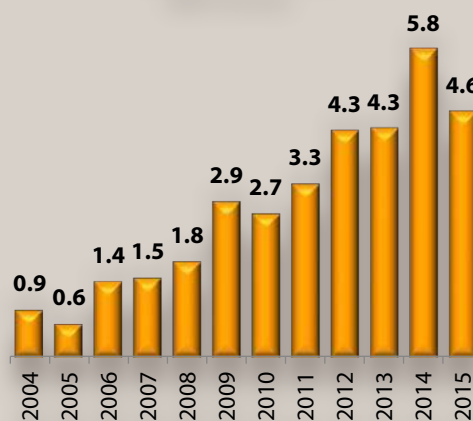
**Avocado - Brazil
Exports by destination**



Source: Trademap



**Avocado - Brazil - Exports
(000 tonnes)**



Source: Trademap



Logistics

The fruits are loaded into refrigerated containers, and then transported by road to the port of Santos. There are several shipping lines providing a link with Europe. The transport time is approximately 11 to 15 days for Southern Europe (Algeciras, Barcelona, Genoa) and 13 to 16 days for Northern Europe (Rotterdam, Thamesport, Hamburg).

Avocado — Brazil — Sea-freight logistics

Departure port	Arrival port	Voyage time
Santos	Rotterdam, Thamesport, Hamburg	13-16 days
	Algeciras, Barcelona, Genoa	11-15 days