



2016

Country Profile: Mexico Jalisco

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

Producer country file

The avocado in Jalisco (Mexico)

by Eric Imbert

Packed mainly into the south-east of the State, the Jalisco avocado sector has established the world's fifth biggest Hass cultivation area in barely more than ten years. The region enjoys multiple assets, chief among which is the marketing calendar of its flagship variety, Hass Mendez, with which it can take advantage of a very open and lucrative summer market window. The authorisation to export to the United States obtained in May 2016 and the extensive land reserves well suited to the crop should further reinforce the already very strong planting dynamic.

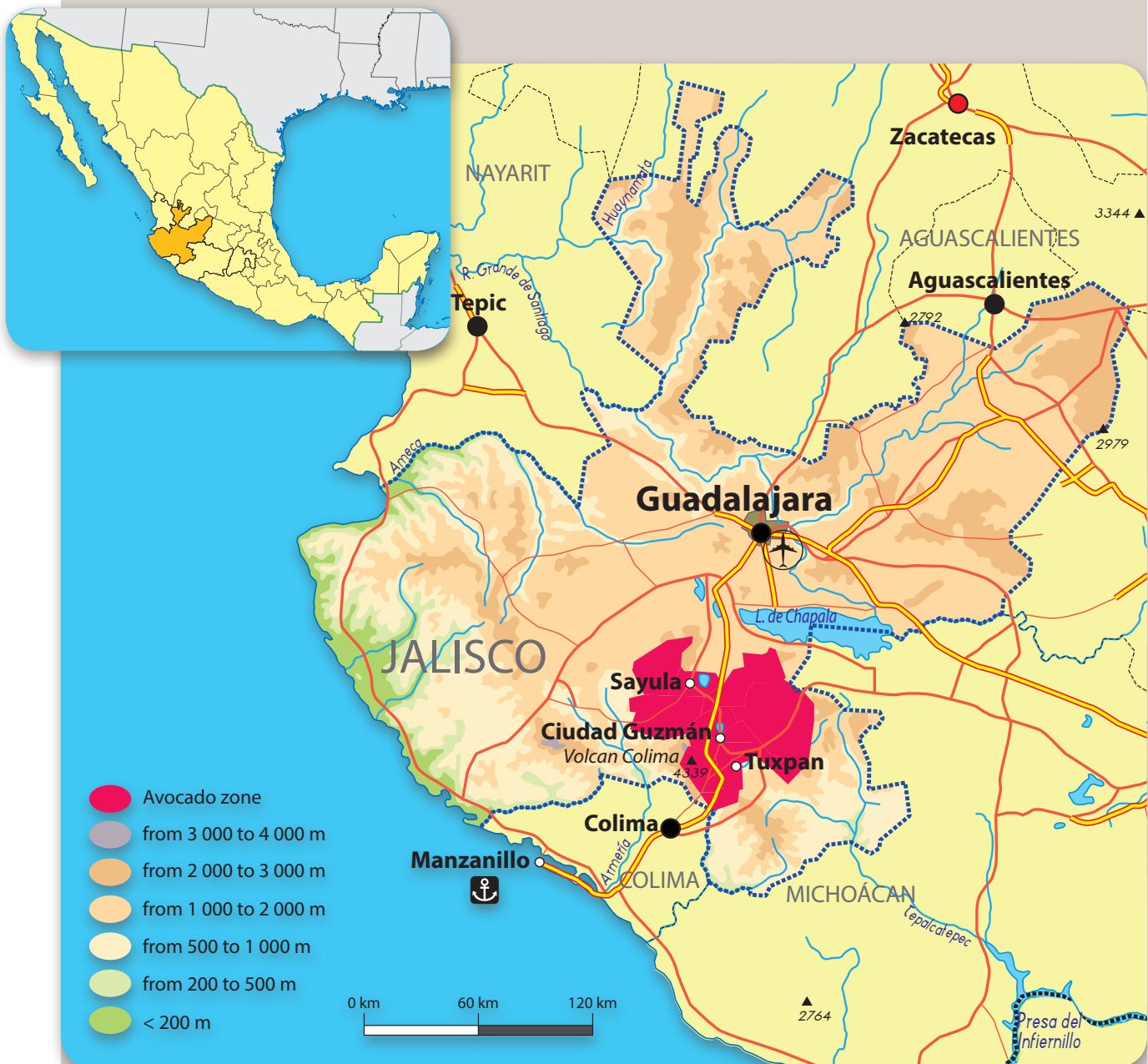


Avocado — Jalisco

Location

The 17 000 ha of young orchards are packed mainly into the south-east of the State. Approximately 85 % of the plantations are situated around Ciudad Guzmán, within a radius of approximately 50 km. The main cultivation centres are situated to the west (Zapotitlán, San Gabriel, Tapalpa, etc.), to the north (Sayula, Gómez Farías, etc.) and to the east (Concepción, Mazamitla, etc.). The plantation altitudes range between 1 200 and 2 500 m, with Mendez generally planted on the lowest levels (1 200 to 1 800 m). In most zones, the soils are vol-

canic in origin and are very good for avocado cultivation (sandy texture and rich in organic matter). They can be more clayey and less favourable in certain parts of the State (Sayula). The scale of the production facilities is larger than in Michoacán (around 8 to 10 ha), and they have a higher technical level. Hence nearly three-quarters of orchards are irrigated, enabling yields of between 15 and 25 t/ha to be achieved (average of around 18 t/ha). The Association of Jalisco Avocado Export Producers (APEAJAL) governs the bulk of the region's 1 300 producers.



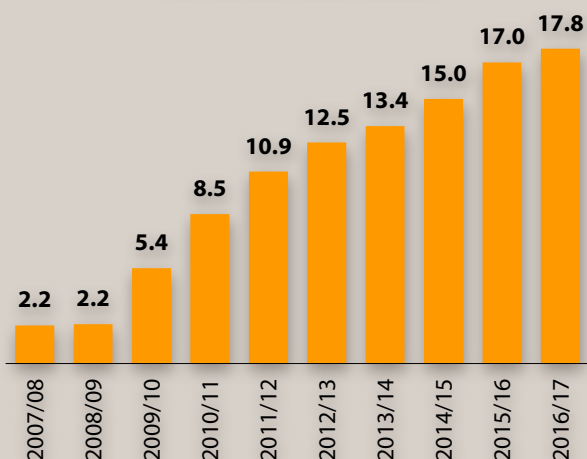
Avocado — Jalisco

Production

Unlike Michoacán, the avocado is not a traditional crop in Jalisco, whose agricultural sector is focused mainly on industrial crops (sugar cane, agave, maize) or certain horticultural specialities such as the tomato. The very first commercial avocado orchards were set up by two regional agricultural groups in the early 1980s. After a period of relative stability, the plantations saw an initial surge toward the middle of the last decade, with producers moving in from Michoacán in an effort to make up for their lack of production during the summer by planting an early clone (Mendez) in warmer zones. Surface areas went from less than 1 000 ha in 2004 to approximately 17 000 ha in 2016, with the avocado replacing sugar cane or agave plantations, or prairies and primary pine forests. Growth, already extremely high in recent years (approximately 1 000 to 2 000 ha/year), should pick up further with the strong commercial prospects due to the opening of the US market. The political climate is more favourable for investment than in neighbouring Michoacán, and land reserves are still substantial, although the best land is already occupied and the competition with other high added-value crops such as the blueberry is significant.

Avocado - Jalisco - Evolution of cultivation area

(000 hectares / source: Oeidrus)



Avocado — Jalisco



Production calendar and varieties

Mendez, an early cultivar of Hass, is Jalisco's major asset. Its harvest can begin in early June in the warmest low-altitude zones (August to October for higher-altitude zones). This variety reportedly represents approximately 40 to 50 % of production. The rest of the cultivation stock comprises Hass, with plantations primarily concentrated in the highest altitude zones.



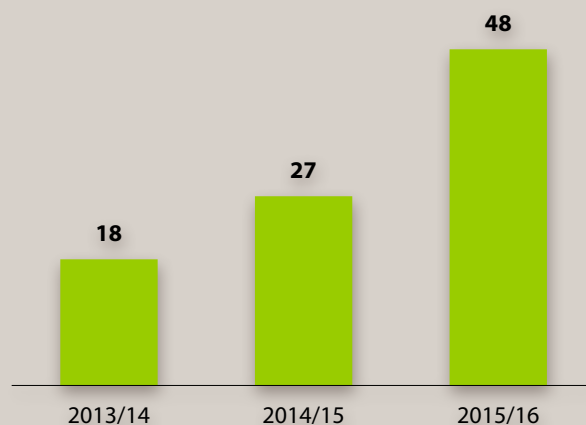
Exports

Exports have expanded rapidly in recent years, reaching a level of around 50 000 t in 2015-16. Until then, they were mainly aimed at the Japanese, Canadian and European markets. Authorisation to enter the United States, officially decreed in late May 2016, and which should take effect during the summer, should both provide a distinct increase in export volumes and a switch toward this market where doing business is easier, due to its proximity and greater flexibility than Japan or Europe in terms of fruit size or appearance. The 5 700 to 6 000 ha accredited by the USDA should enable between 45 000 and 50 000 t to be shipped to this destination from the 2016-17 campaign. Around fifteen packing stations are operational, one of which is US-owned (Calavo).



© Avoselect S.A. de C.V.

Avocado - Jalisco - Estimated exports
(000 tonnes / professional sources)



Avocado — Jalisco

Outlets

The majority of produce is sold fresh on the local market, where the Mendez variety can take advantage of the high prices charged from June to August during Michoacán's production trough (25 to 30 pesos/kg wholesale, as opposed to 15 to 20 pesos at the beginning of the year). However, exports are tending to rise steeply. An oil plant was set up in 2015 in the south of the State (Mevi avocados, which purchases approximately 600 t/week for processing, according to the local press).



Logistics

Fruit aimed at the Japanese market is transported by lorry to the port of Manzanillo, less than 200 km away on the Pacific Coast (2 hours' journey). The sea voyage takes just around twenty days. Europe is served from the Atlantic Coast via the port of Altamira, approximately 900 km away (which takes about 11 hours). The sea voyage takes approximately 20 to 25 days to the North European ports. Exports to Canada are made by road-freight (more than 4 000 km, taking approximately 5 days). The US market will also be served by road-freight (around twenty hours to the Texan border).

