



Avocados From Mexico

Production and International
Marketing Outlook

October 31, 2024

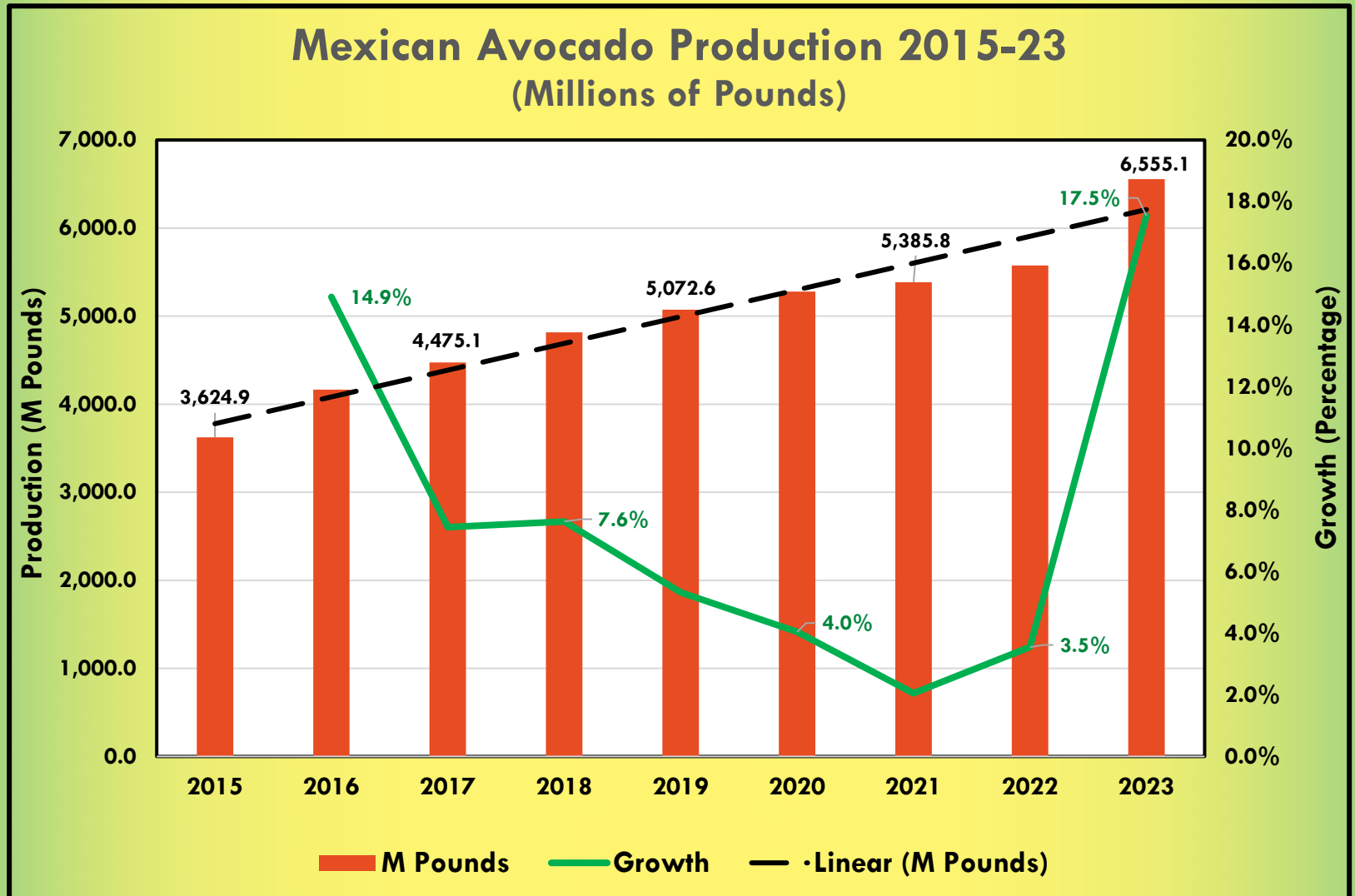
Agenda

- 👁️ The Mexican Production: Evolution and Outlook
- 👁️ International Trade of Mexican Avocados: Status and Potential
- 👁️ Conclusion and Perspectives



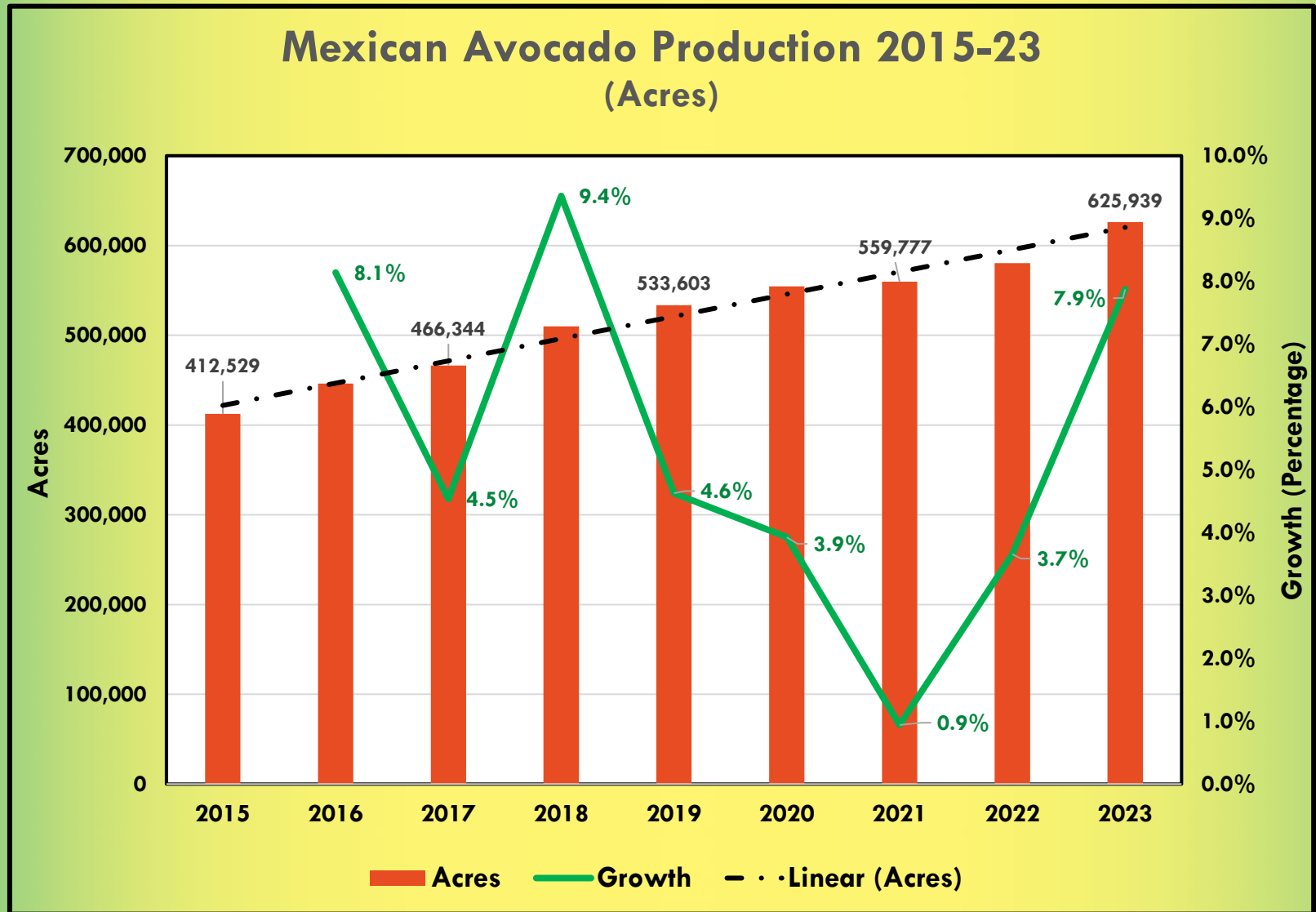
EVOLUTION OF THE MEXICAN AVOCADO PRODUCTION (2015-2023)

EVOLUTION OF THE MEXICAN AVOCADO PRODUCTION



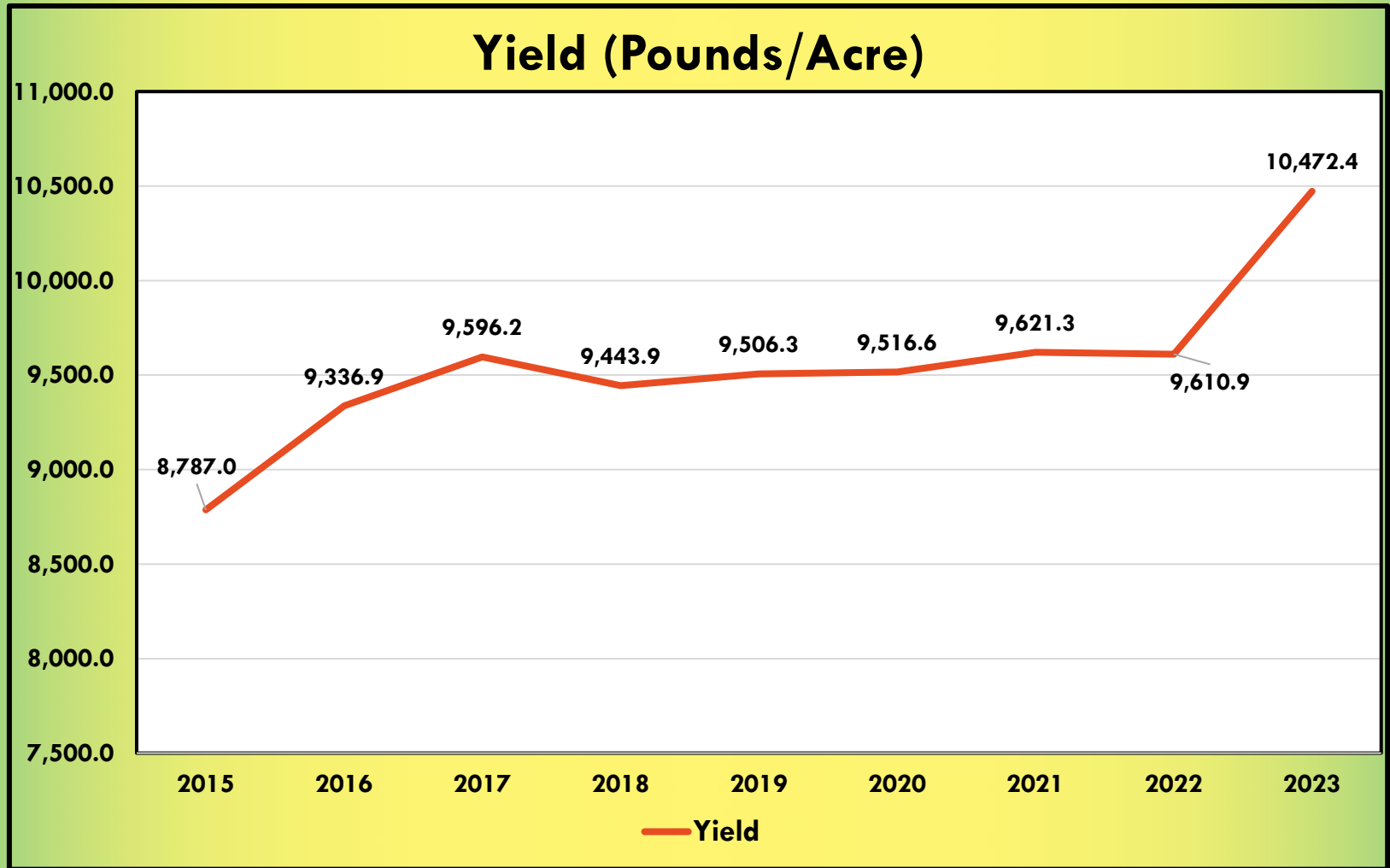
Source: SADER-SIAP

EVOLUTION OF THE MEXICAN AVOCADO PRODUCTION



Source: SADER-SIAP

EVOLUTION OF THE MEXICAN AVOCADO PRODUCTION

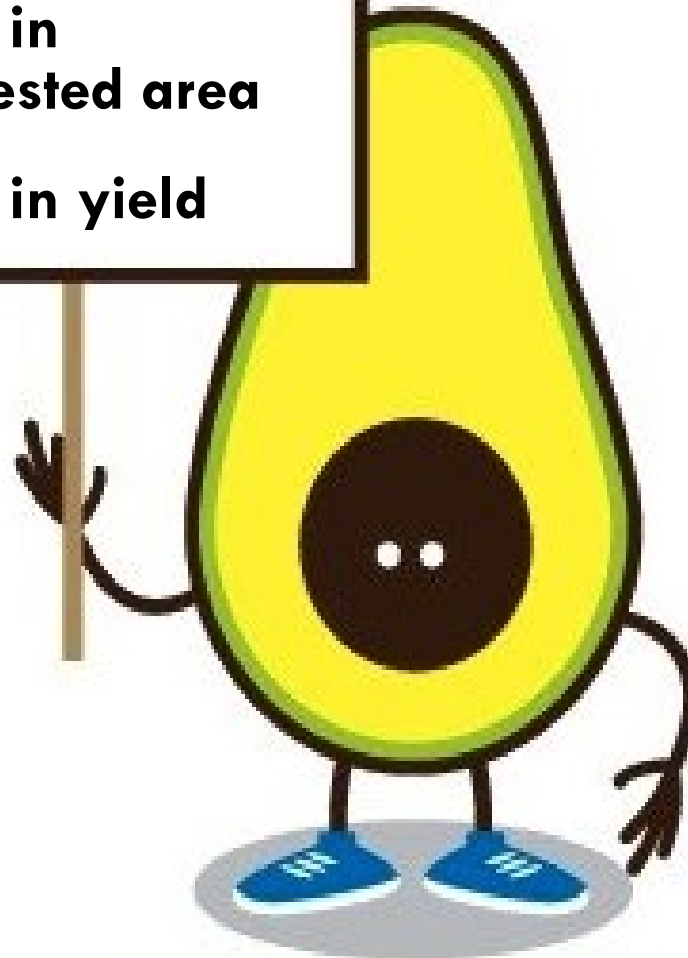


Source: SADER-SIAP

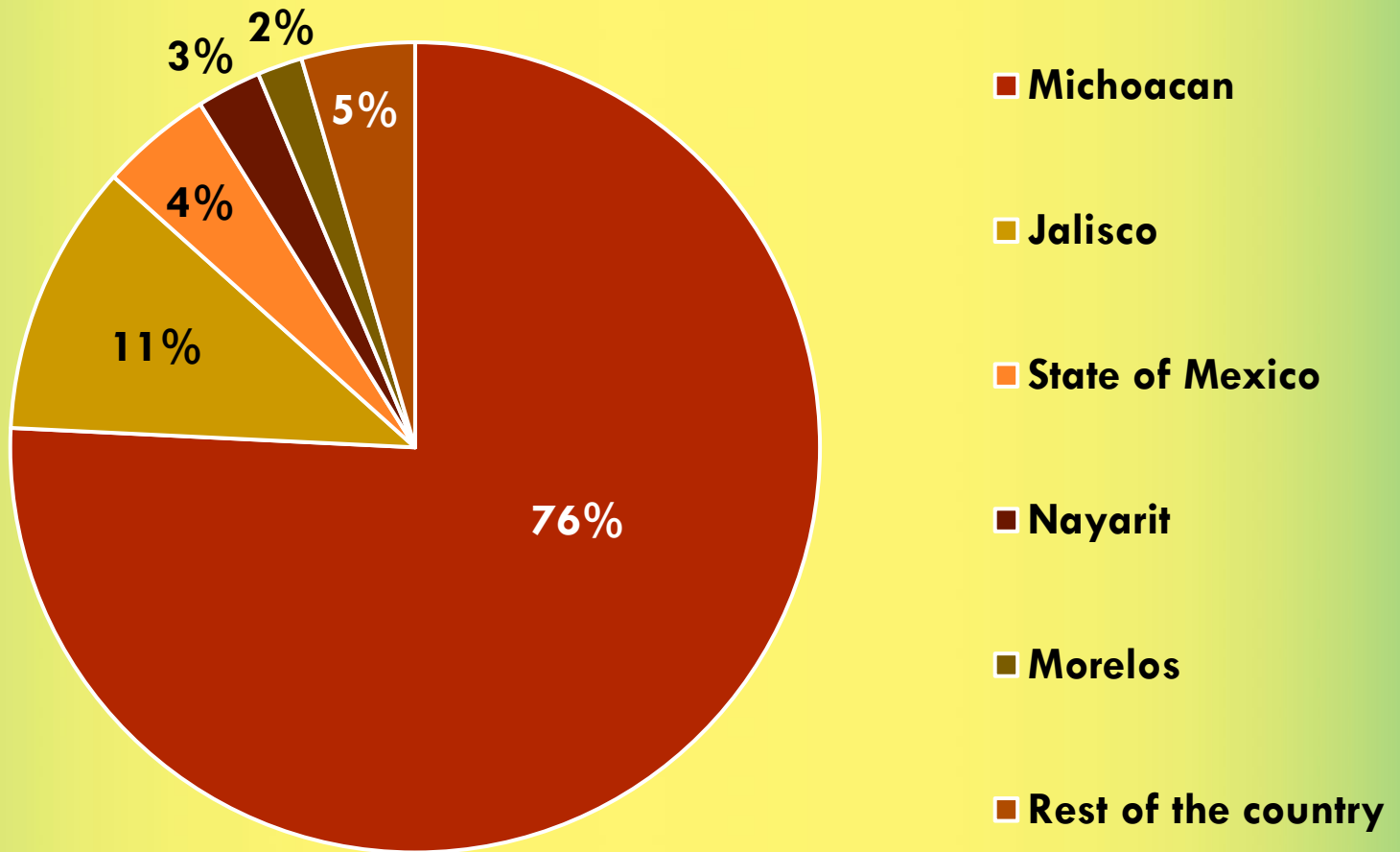
EVOLUTION OF THE MEXICAN AVOCADO PRODUCTION

Between 2015 and 2023, the Mexican avocado industry grew:

- 🌿 **81% in volume**
- 🌿 **52% in harvested area**
- 🌿 **19% in yield**



AVOCADO PRODUCING STATES IN MEXICO (2023)



Source: SADER-SIAP

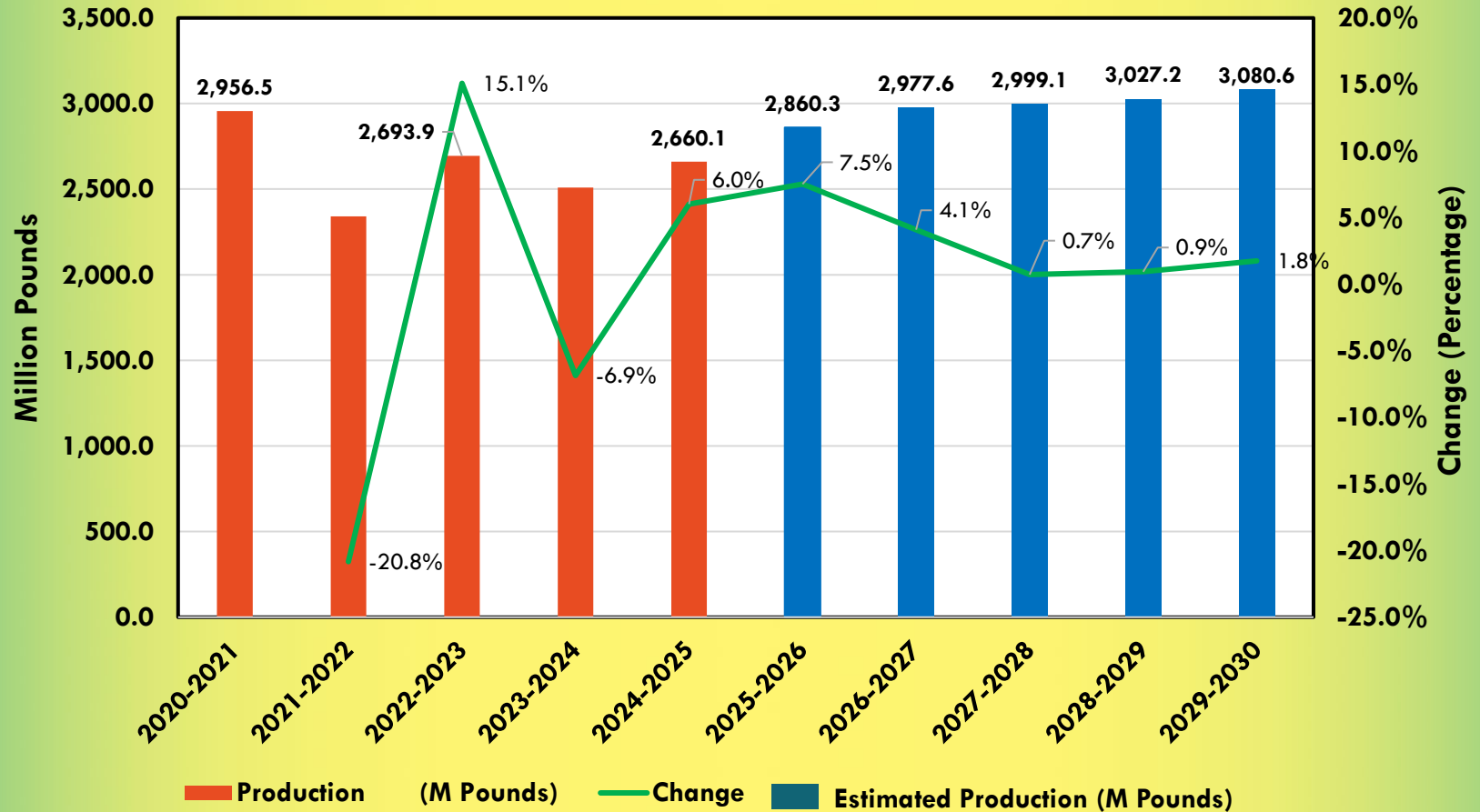


PRODUCTION IN AREAS AUTHORIZED FOR EXPORT TO USA: SITUATION AND OUTLOOK

Rafael Herrera (APEAM), and Dolora Sillman and Joseph Arimany (MHAIA) substantially contributed to this section

PRODUCTION FOR EXPORT TO USA

Production in USA-Authorized Orchards in Michoacan (Millions of Pounds)

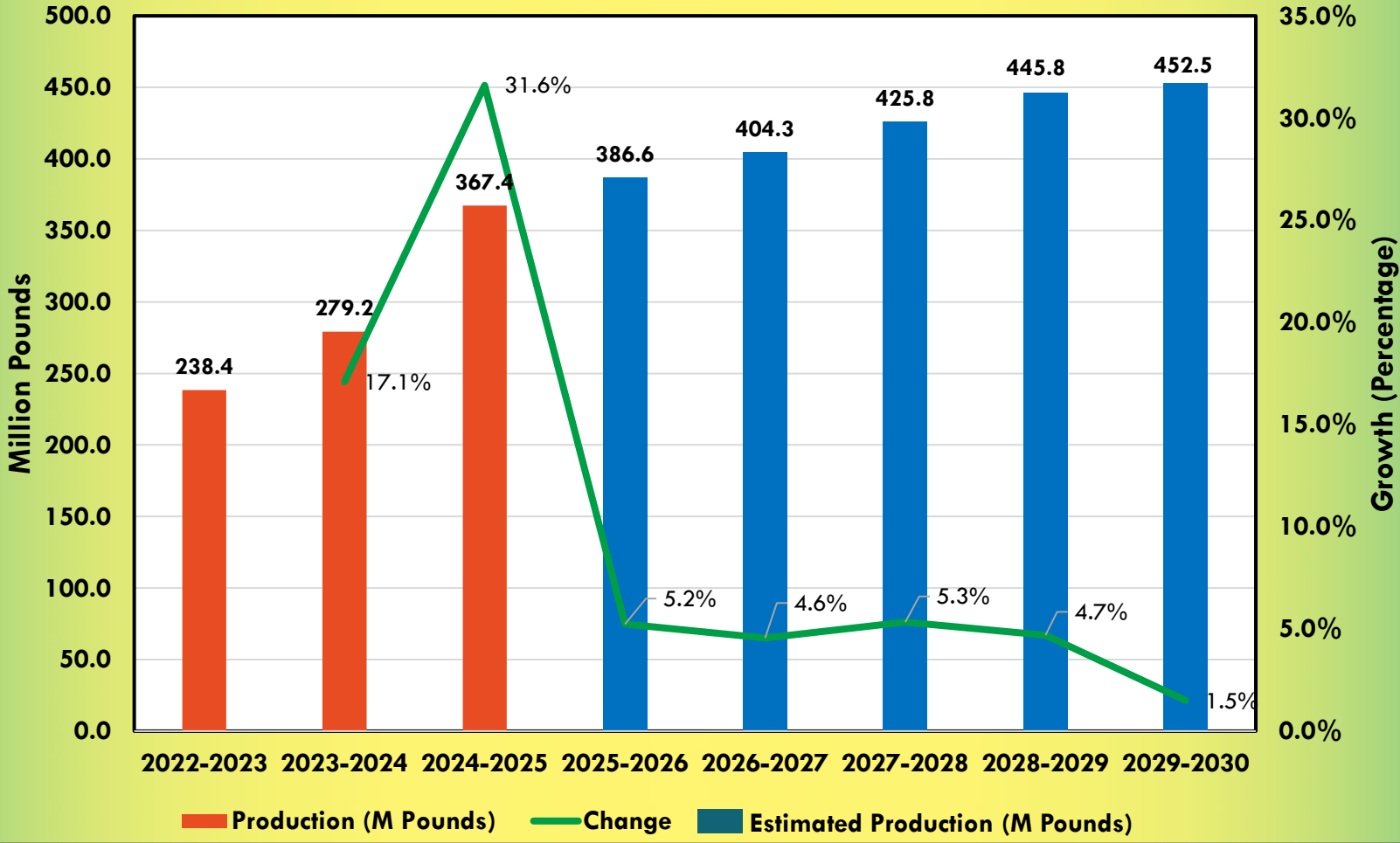


Source: APEAM

- 🕒 USA-Authorized orchards ~ 90% of the state area
- 🕒 Exports to USA: 86% of this production

PRODUCTION FOR EXPORT TO USA

Production in USA-Authorized Orchards in Jalisco (Millions of Pounds)

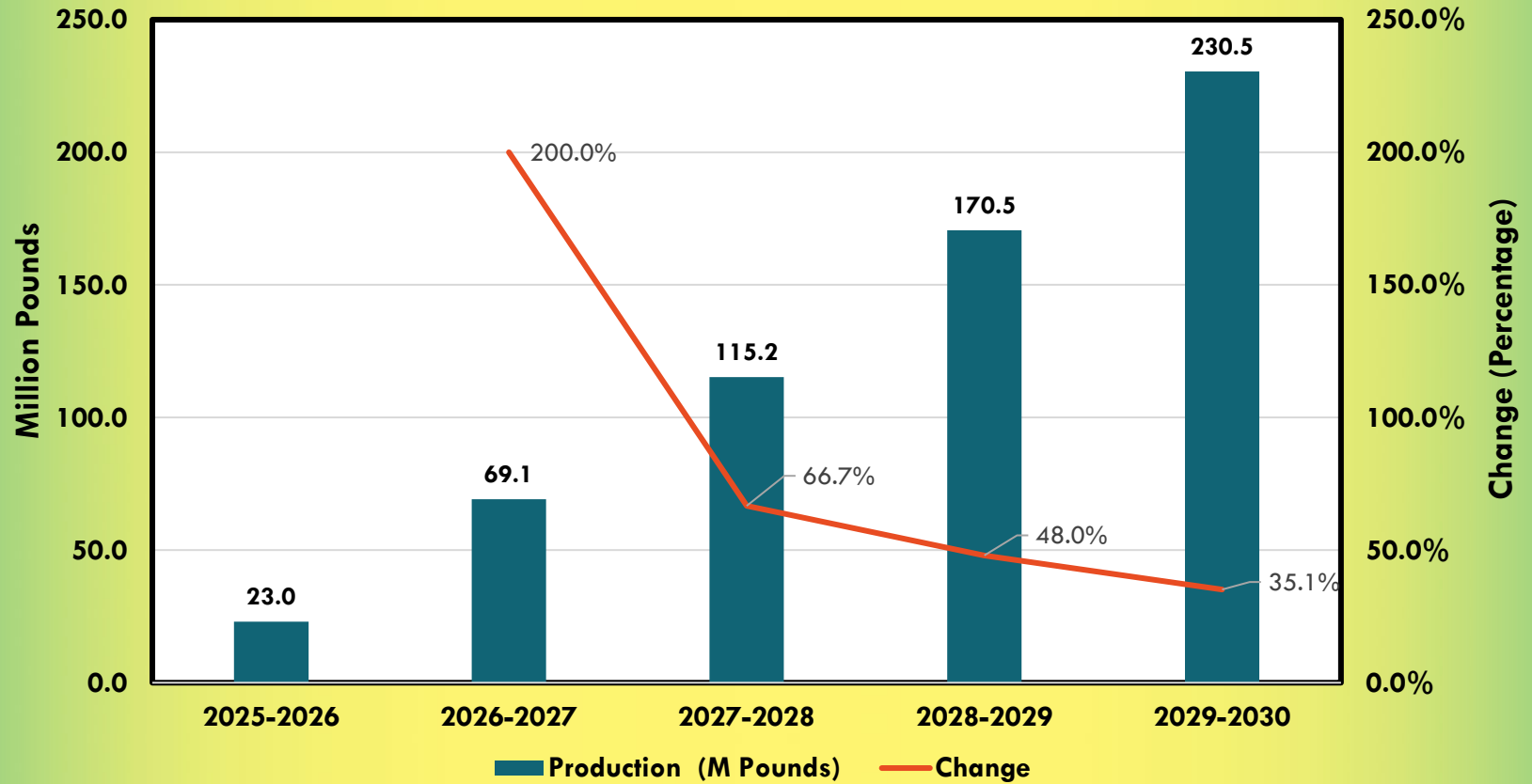


- 📍 USA-Authorized orchards ~ 80% of the state area
- 📍 Exports to USA: 76% of this production

Source: APEAM

PRODUCTION FOR EXPORT TO USA

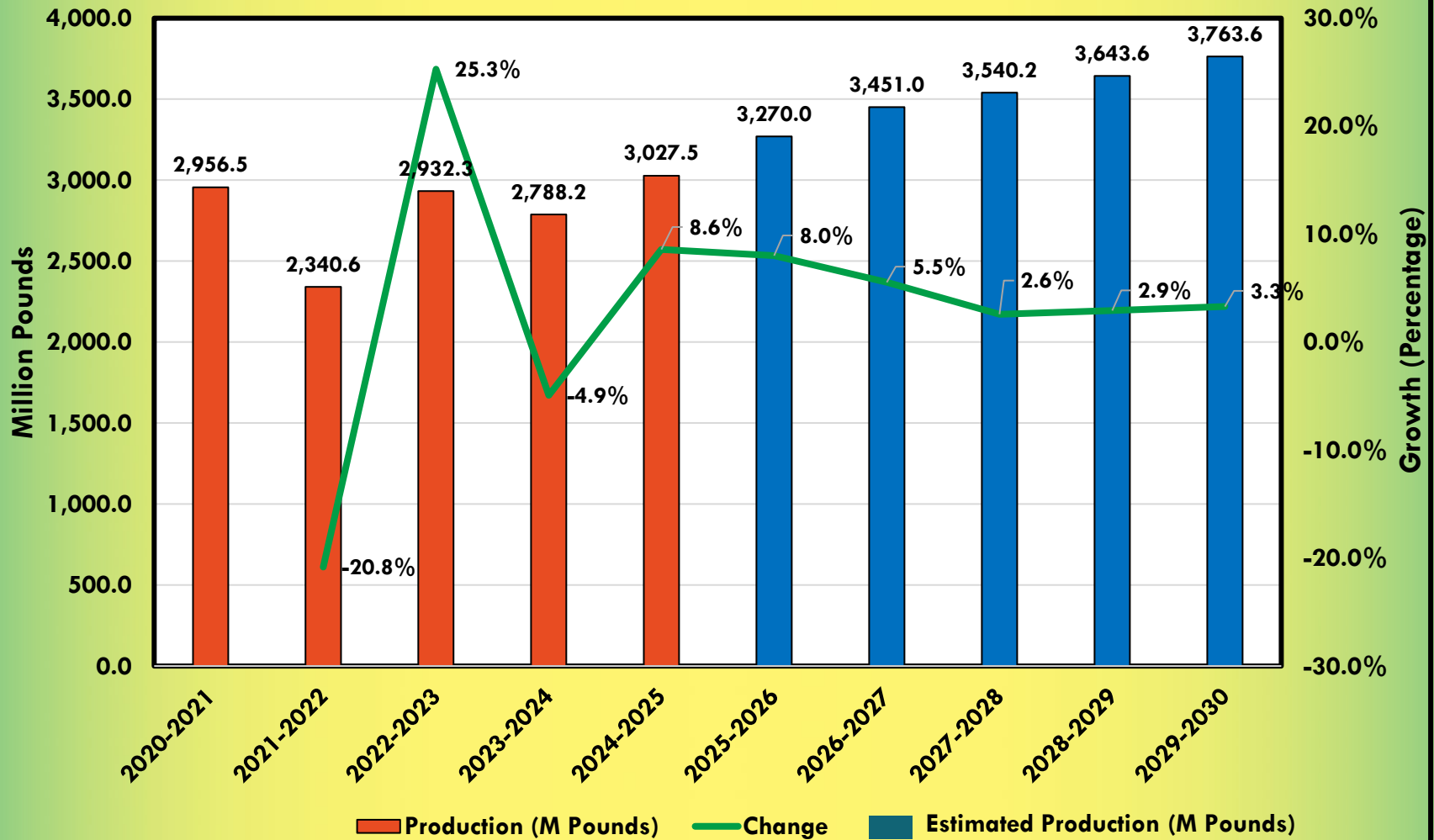
Production in USA-Authorized Orchards in Edo. de Mexico and Nayarit (Millions of Pounds)



- 🕒 USA-Authorized orchards will reach 50% of the states area in 5 years
- 🕒 Exports to USA: 75% of the production

PRODUCTION FOR EXPORT TO USA

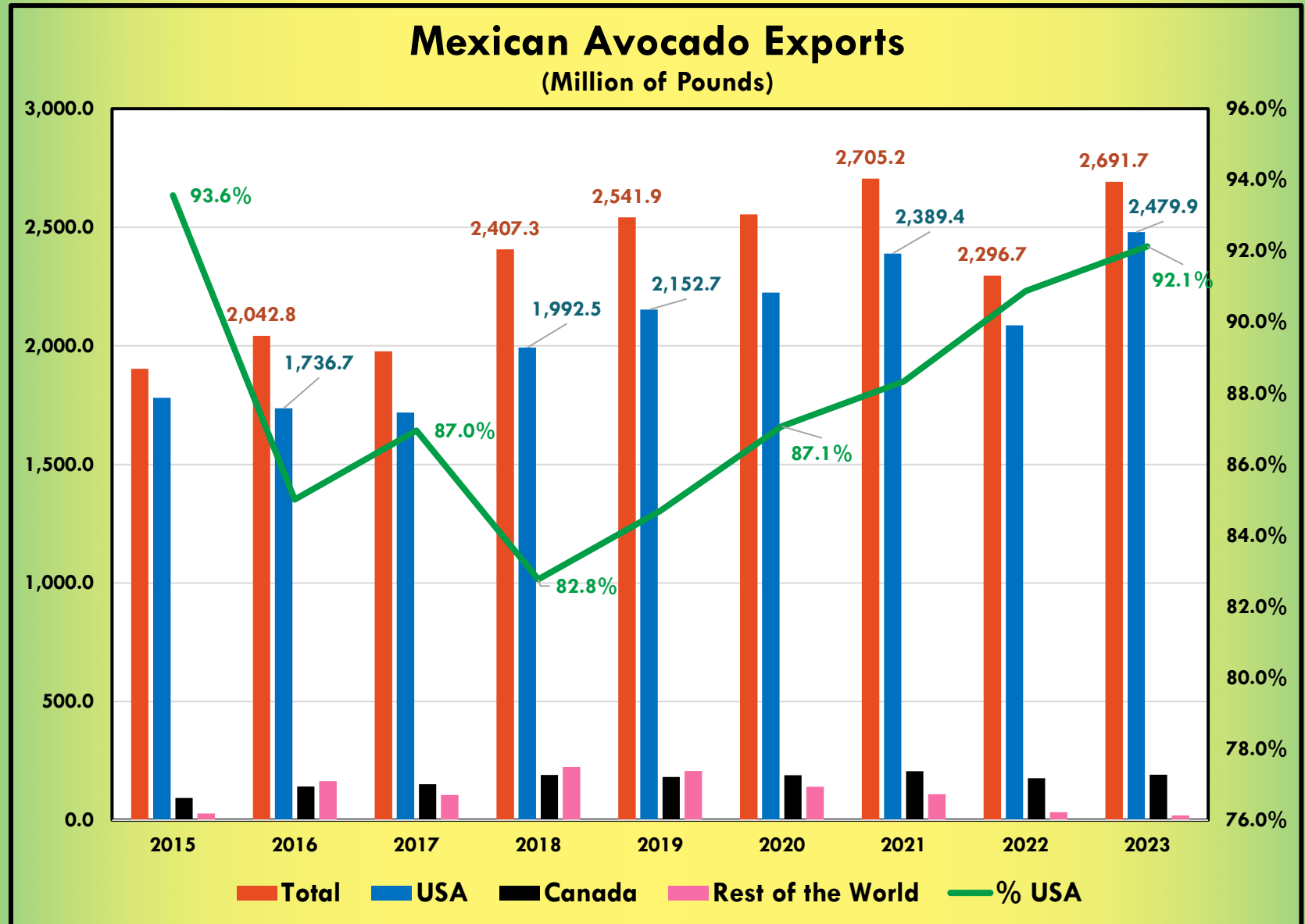
Production in USA-Authorized Orchards in Mexico (Millions of Pounds)





INTERNATIONAL TRADE OF AVOCADOS FROM MEXICO

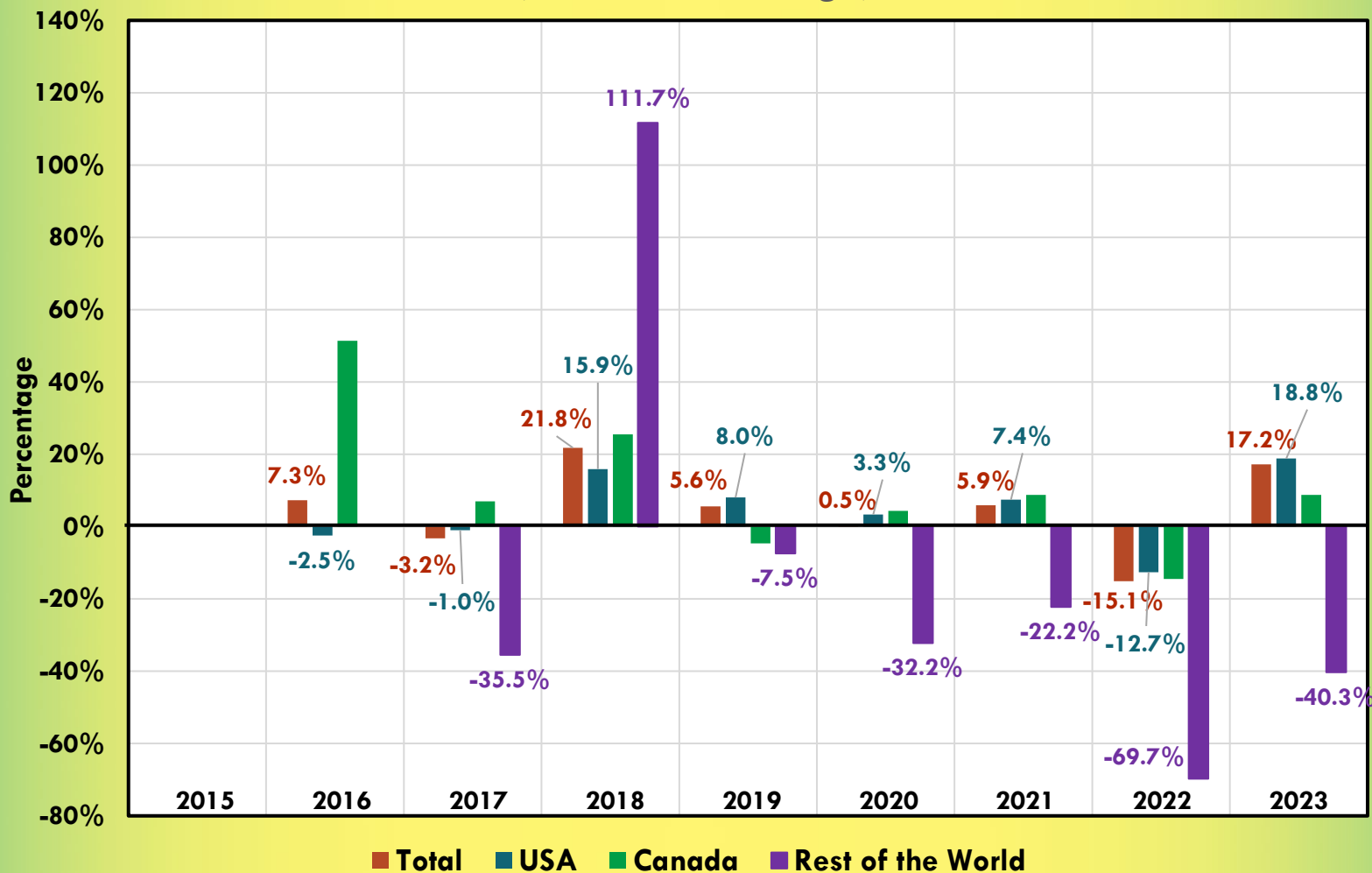
EXPORTS OF AVOCADOS FROM MEXICO (2015-23)



Sources: APEAM, ITC, FAOSTAT

EXPORTS OF AVOCADOS FROM MEXICO (2015-23)

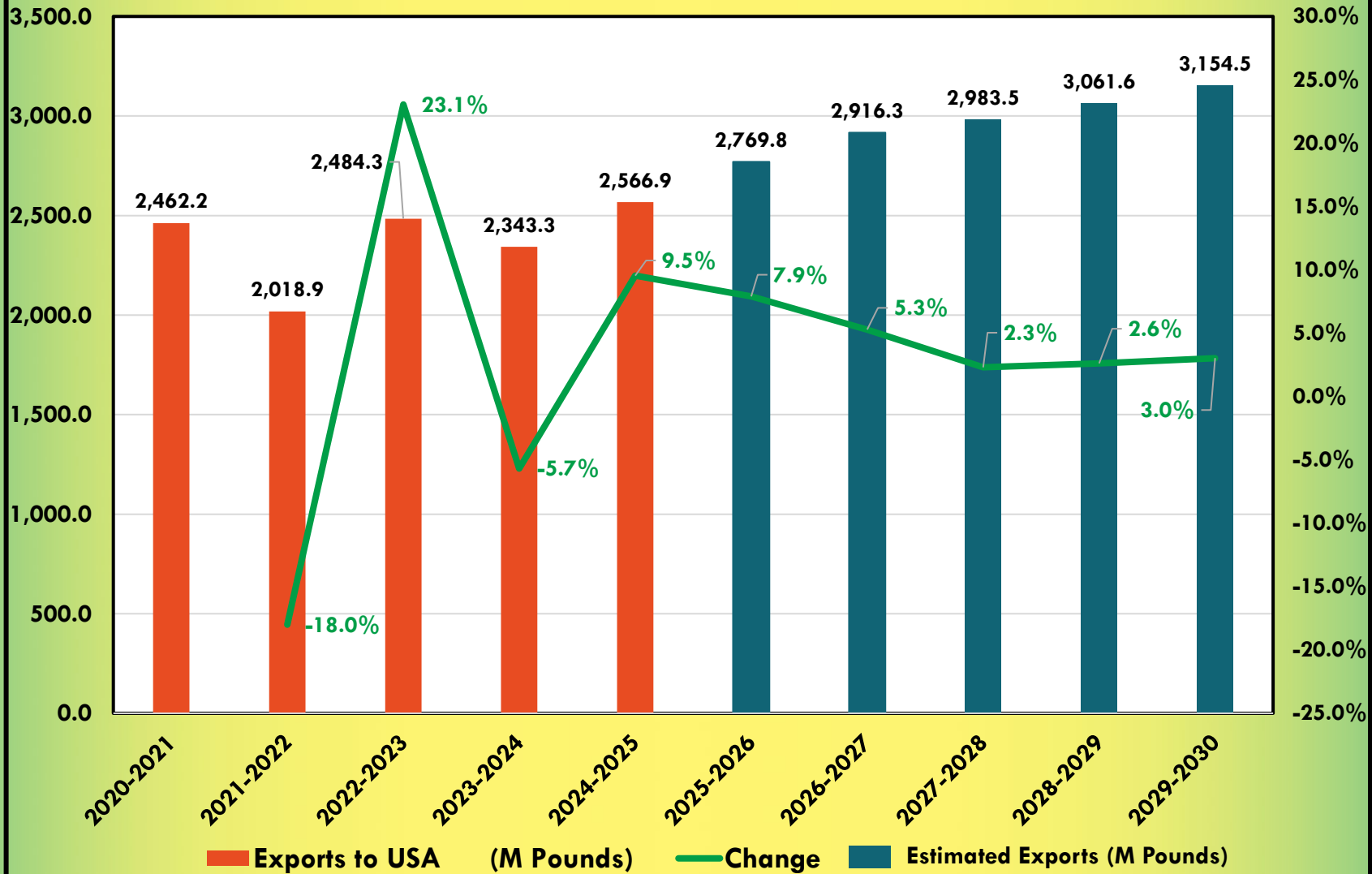
Growth of Mexican Avocado Exports (Annual Percentage)



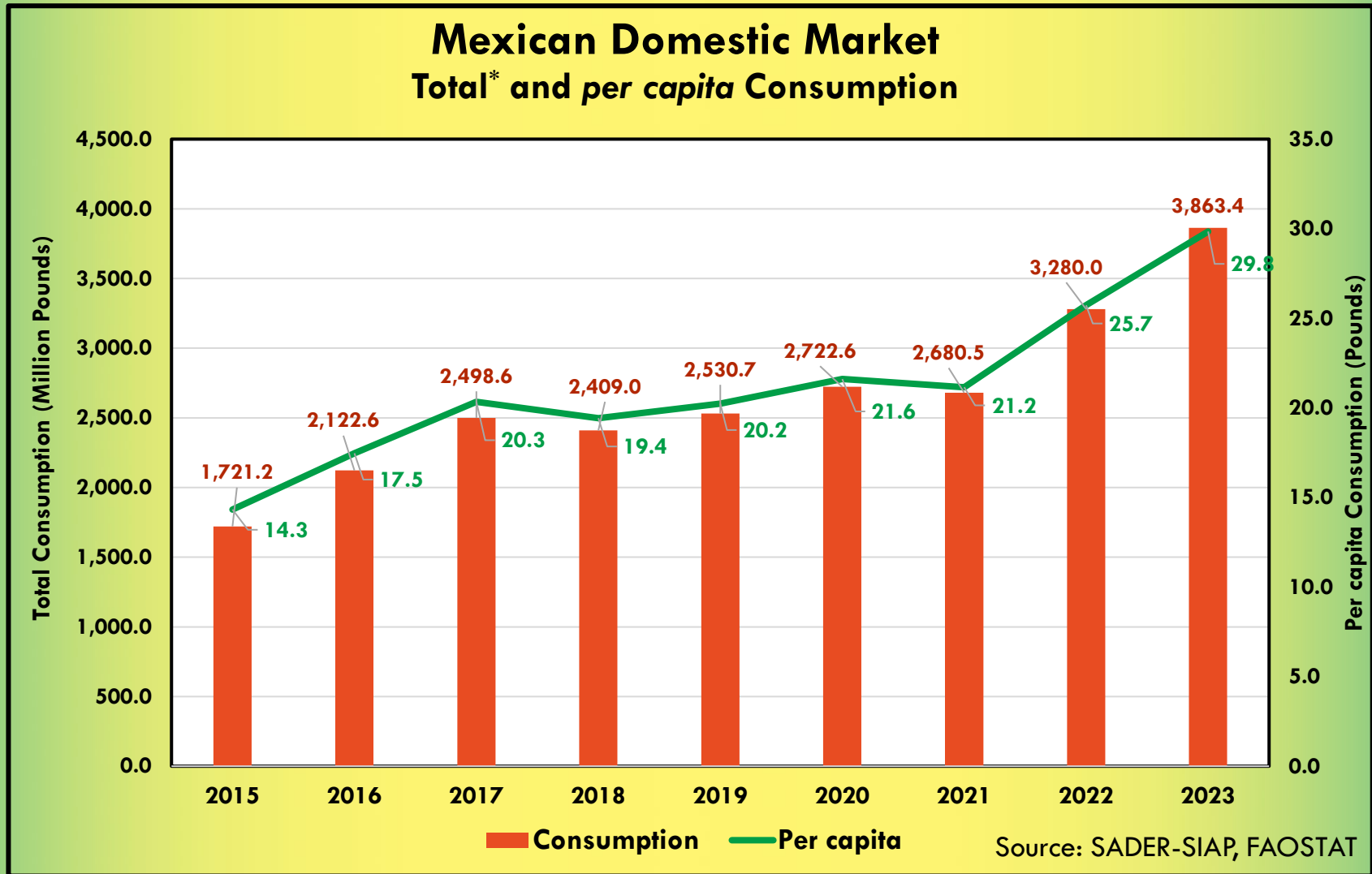
Sources: APEAM, ITC, FAOSTAT

EXPORTS TO USA

Exports of Avocados From Mexico to USA (Millions of Pounds)



THE MEXICAN DOMESTIC MARKET IS GROWING



(*) Total Consumption calculated as Apparent Consumption = Production + Imports – Exports. It includes volumes used in Mexico by the processing industry, ~660 million pounds in 2023. Corrected *per capita* consumption should be ~25 pounds.



CONCLUSIONS AND PERSPECTIVES

Conclusions and Perspectives

- 🕒 Between 2015 and 2023, the Mexican avocado production grew 81%: 52% in harvested area + 19% in yield.
 - 🕒 Reached 6.6 billion pounds in 626,000 acres
 - 🕒 Average annual growth rate exceeds 7%
- 🕒 Michoacan (76%) and Jalisco (11%) concentrate most of the Mexican avocado production
 - 🕒 90% of the Michoacan area, 80% of the Jalisco area, and 50% of the area of the states of Mexico and Nayarit (a total of around 500,000 acres) will be certified for exporting to USA by 2030
 - 🕒 Total production in USA-authorized areas will exceed 3.5 billion pounds by 2030
- 🕒 Mexican avocado exports reached 2.7 billion pounds in 2023
 - 🕒 Exports to USA reached 2.48 billion pounds in 2023 and represent between 85% and 90% of the Mexican exports
 - 🕒 Mexican exports continue growing in USA and Canada at an annual rate of 2.5 to 3.0%; they have significantly declined in all other export markets
 - 🕒 Mexican exports to USA will exceed 3.0 billion pounds by 2030

Conclusions and Perspectives

- 🕒 Mexico will continue focusing on the North American market, and particularly on the USA market
 - 🕒 Mexican efforts, strategies, and investments will concentrate in further increasing consumption in the USA market and continue building the Avocados From Mexico® brand
 - 🕒 Participation in other international markets will likely be limited and opportunistic
- 🕒 The Mexican domestic market has recovered its strength
 - 🕒 Mexican consumption exceeded 3.8 billion pounds in 2023 (including ~660 million pounds used by processors), growing ~10%/year
 - 🕒 *Per capita* consumption was ~25 pounds in 2023
 - 🕒 The dynamism of the Mexican domestic market (including the use of fruit for processing) will increasingly influence Mexican fresh fruit exports
- 🕒 A North American (USA-Canada-Mexico) market is emerging and will likely converge in prices and commercial practices in a decade

Thank you!
¡Gracias!

