

SECTOR REPORT

Q3 | 2024



AVOCADOS
FROM
COLOMBIA

Sustainability from the heart

corpohass



Sustainability from the heart

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INTRODUCTION

Corpohass, the Corporation of Hass Avocado Producers and Exporters of Colombia, has prepared this sector report using data from the first half of 2024 (January to September).

This report is shared exclusively with its affiliates to support their analysis, forward-looking exercises, and decision-making processes.

The information presented in this report is based on data from official sources, including the ICA (Colombian Agricultural Institute), Dian (National Directorate of Taxes and Customs), Dane (National Statistics Department), and private sources such as Sicex, along with primary data collected from the Exporters' Committee.

If any data from this report is shared publicly, the original source must be cited. Corpohass assumes no responsibility for the accuracy or reliability of the provided data.





AGRICULTURE'S CONTRIBUTION to Colombia's GDP

GDP Gross Domestic Product

The GDP is a key economic indicator representing the market value of all final goods and services produced within a country over a specific period, typically a quarter or a year.

It reflects the nation's economy's size, health, and performance.

Over the past two decades,
agriculture has contributed between

5% – 7%

of Colombia's total GDP



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AGRICULTURE'S CONTRIBUTION to Colombia's GDP



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Figures in billions of pesos

Source: Dane

HASS AVOCADO'S CONTRIBUTION to Colombia's Agricultural GDP



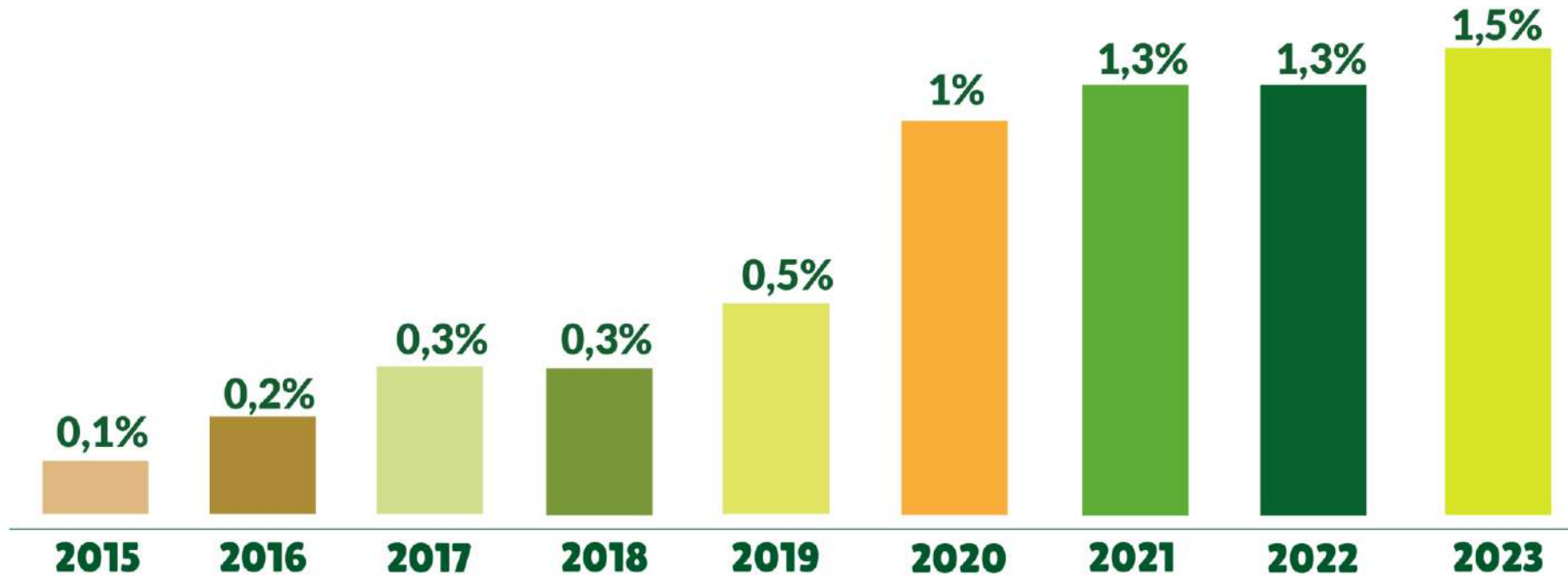
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+150%
Hass contributions
to agricultural GDP

16 departments
Hass Avocado Producers
230 municipios

61.063 jobs
created by the agroindustry
(direct + indirect)

% Hass Avocado's contribution to Colombia's Agricultural GDP



Agricultural GDP	2015	2016	2017	2018	2019	2020	2021	2022	2023
	\$ 48.124	\$ 49.441	\$ 52.198	\$ 53.030	\$ 54.471	\$ 55.539	\$ 57.960	\$ 57.479	\$ 58.493

Figures in billions of pesos

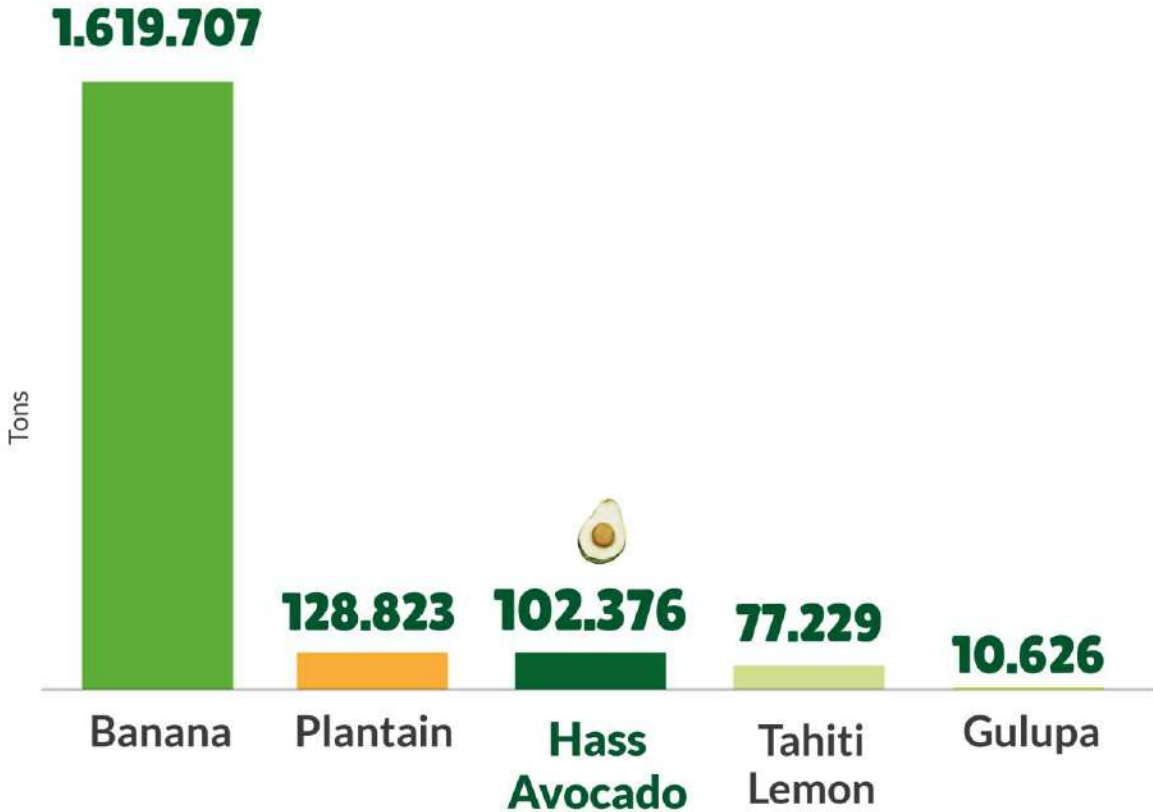
OPEN MARKETS

Avocados from Colombia



COLOMBIAN FRUIT EXPORTS

January - September 2024



Source: Dian

USD \$218.648.957

Income generated
by Hass Avocado

January - September 2024



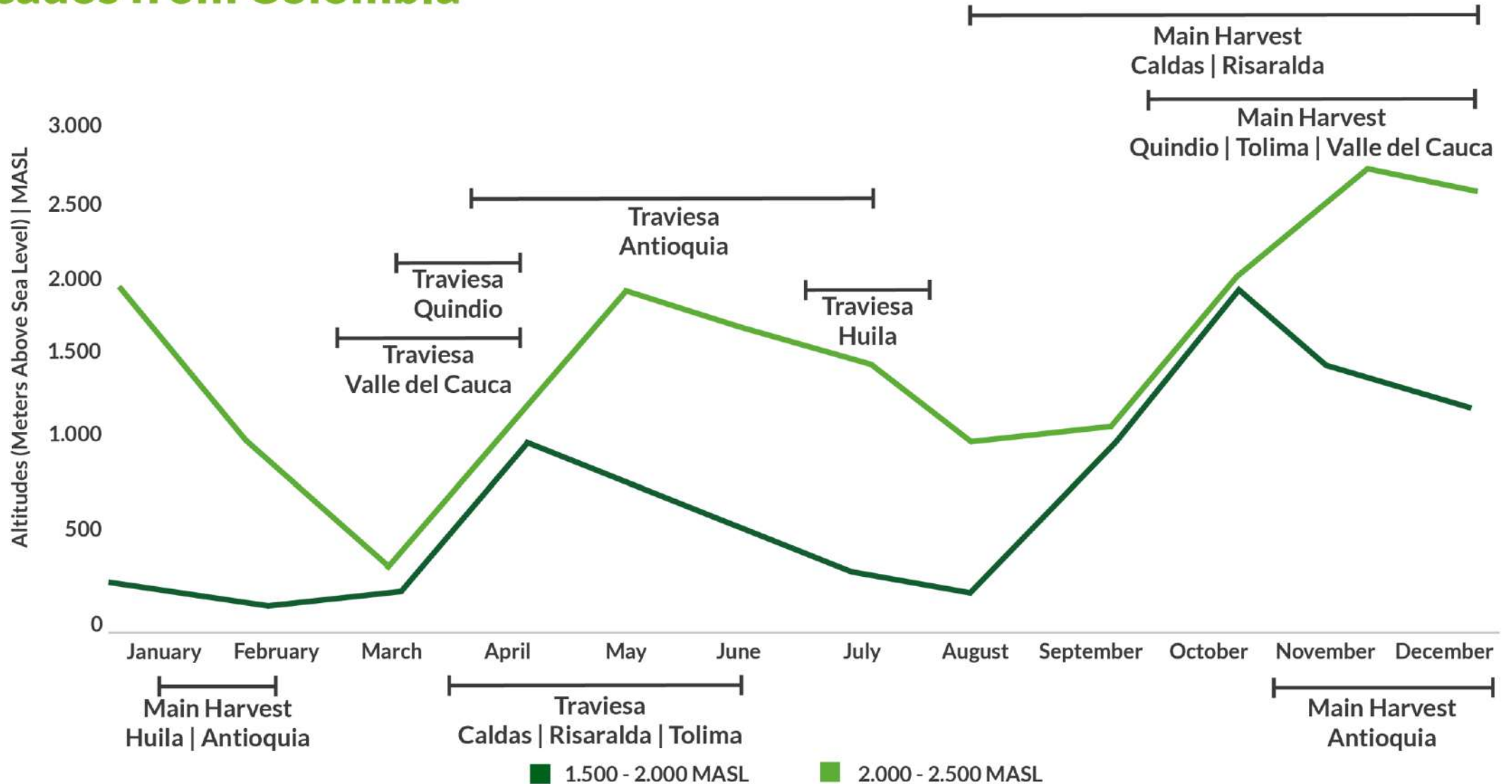
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HARVEST SEASONS

Avocados from Colombia



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EXPORTS

Avocados from Colombia



EXPORTS PER MONTH

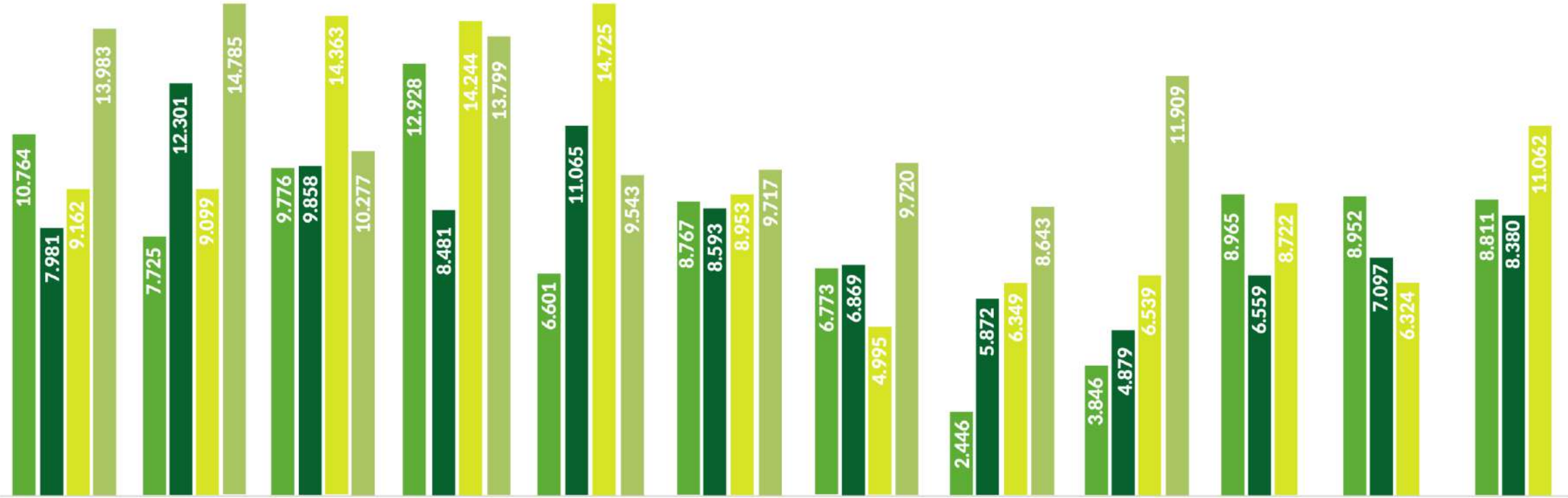
Avocados from Colombia



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Tons

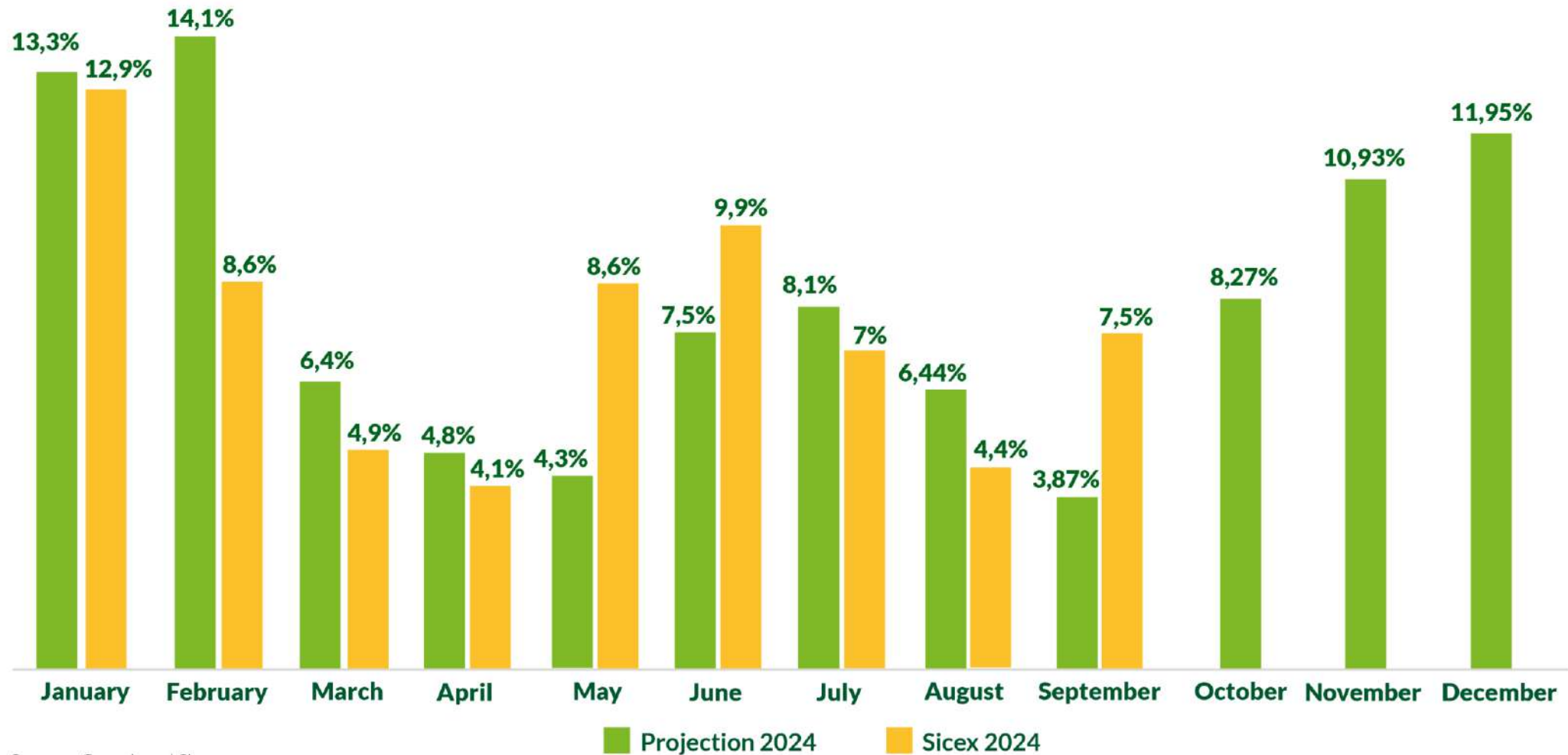


■ 2021 ■ 2022 ■ 2023 ■ 2024

Source: Dian

EXPORTS VS. PROJECTIONS

Avocados from Colombia



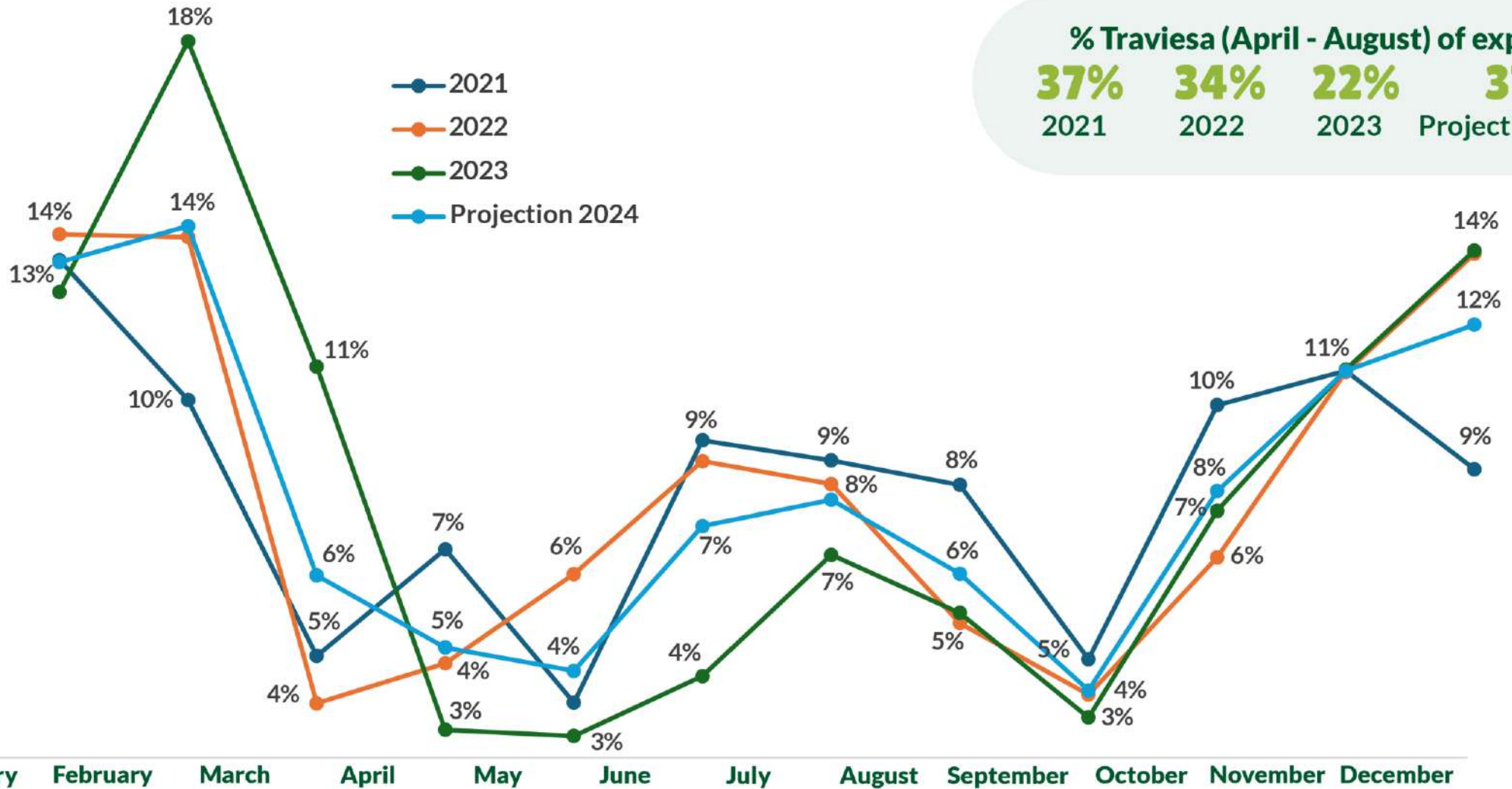
Sources: Corpohass | Sicex

EXPORTS

Avocados from Colombia



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PRODUCTION AREAS



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¿WHERE IS OUR Avocado Grown?



12.230 hectares
in **Zomac** territories
38% of total

*Zomac:
Zones affected by
armed conflict.

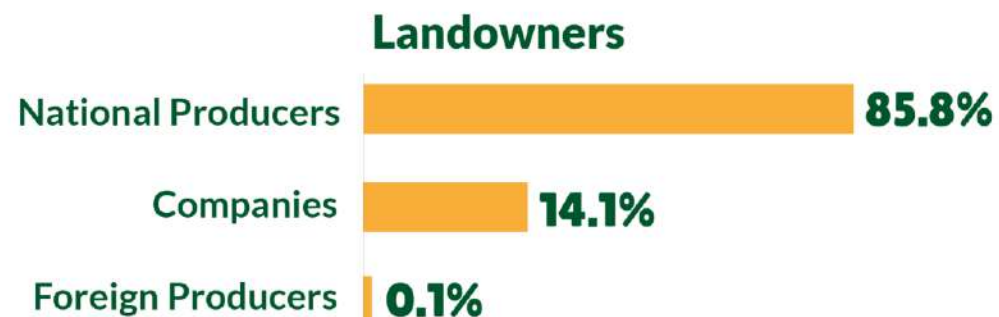
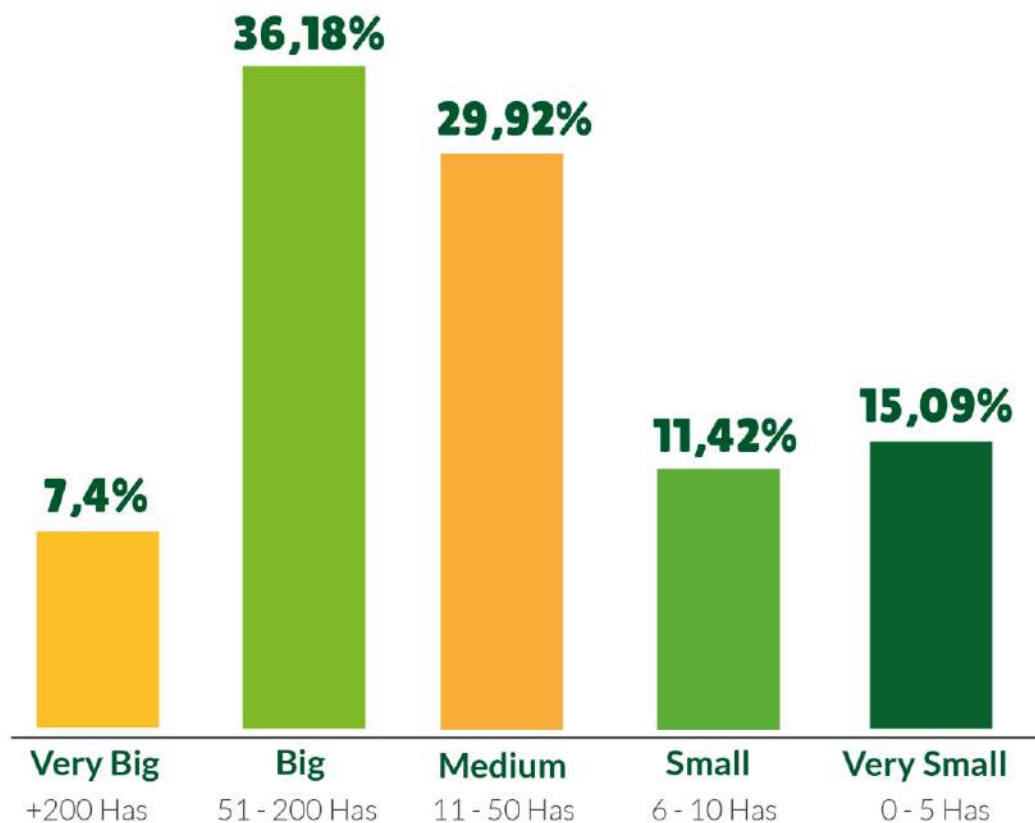
	 Registered Farms	 Registered Hectares
Antioquia	2.039	18.046,6
Tolima	363	1.730,1
Caldas	353	5.121,8
Risaralda	271	5.110,7
Huila	250	1.126,5
Valle del Cauca	173	2.984,5
Cauca	159	416
Narino	115	155,3
Cundinamarca	85	588,9
Quindio	81	2.837,3
Putumayo	21	74,9
Boyaca	15	36,7
Santander	12	91,9
Magdalena	6	542,2
Norte de Santander	5	12,7
Caqueta	1	33
Choco	1	5
Total	3.950	38.914,1



Source: ICA
*November 2024

FARMS

By Land Size



Source: ICA
*November 2024

EXPORTER FARM REGISTRATION

This registration is essential for exporting harvested avocados. It clarifies the farm ownership (natural person or legal entity) and defines their productive activities.

It is also an essential requirement for Hass Avocado exports, as it guarantees the certification of Colombian origin to international markets and ensures compliance with phytosanitary regulations and agreements between countries.

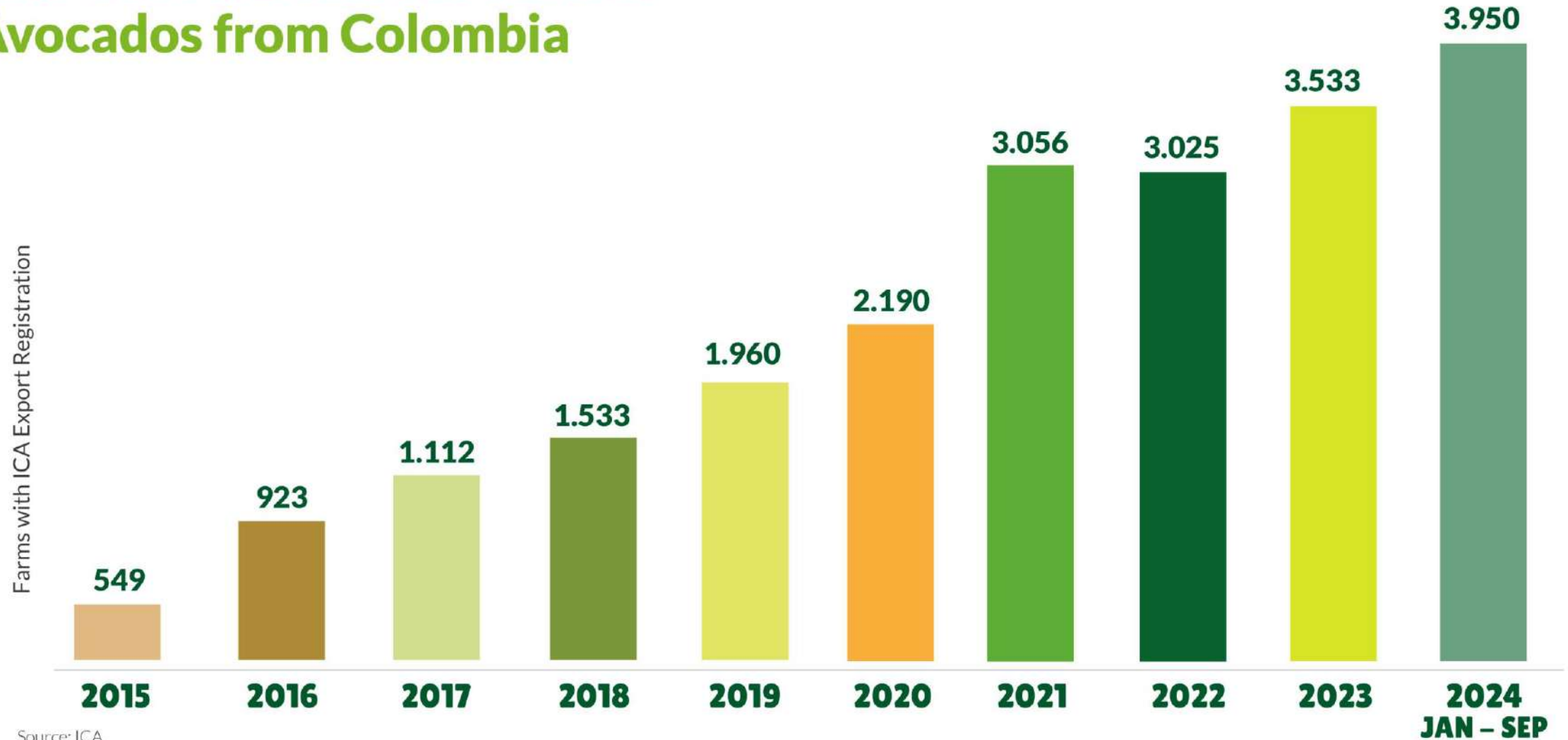
*More info: corpohass.com

FARMS WITH ICA EXPORT REGISTRATION

Avocados from Colombia



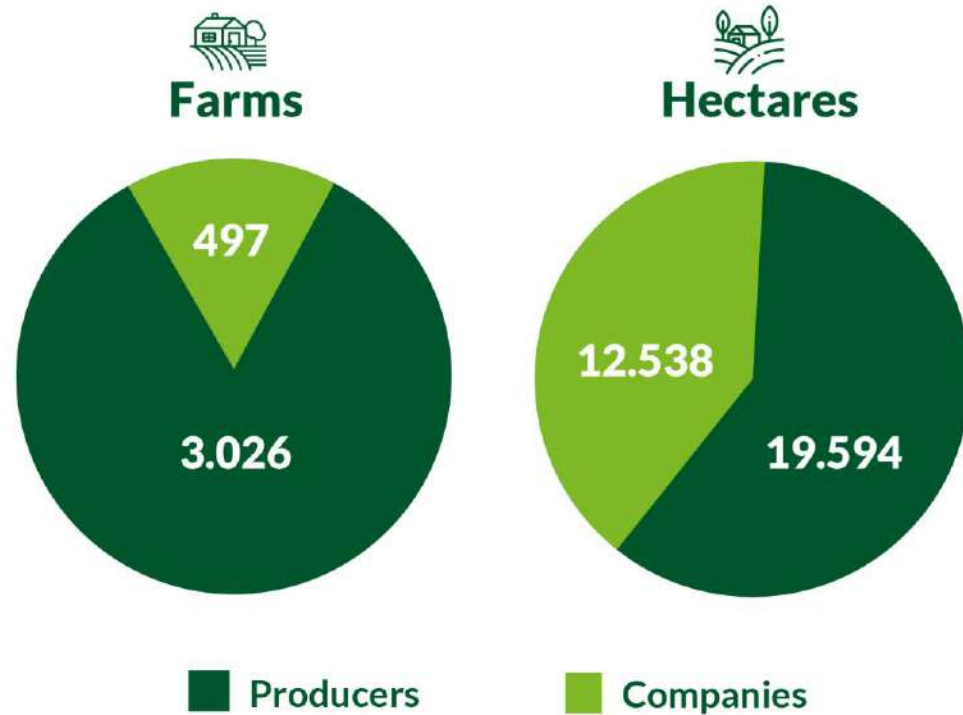
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Source: ICA

AREA WITH EXPORT FARM REGISTRATION

January - September 2024



Source: ICA

AVERAGE AREA PER FARM
4,13 hectares Producers
39,2 hectares Companies

MARKETS



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OWP OPERATIONAL WORK PLAN

Defines the obligations and responsibilities of producers exporting Hass avocados to particular markets:

- **USA**
- **Argentina**
- **Japan**
- **Peru**
- **South Korea**
- **China**
- **Chile**

REQUIREMENTS

Operational Work Plan -OWP-

	 USA	 China	 Korea	 Peru	 Argentina	 Japan	 Chile *
Application Submission	X	X	X	X	X	X	X
Boundary Survey	X	X	X	X	X	X	X
SH Data Upload	X	X	X	X	X	X	X
Development of Property Boundary Map	X	X					X
Farm Characterization	X	X					X
Initial Diagnosis	X	X	X	X	X	X	X
Monthly Pest Monitoring	X	X	X	X	X	X	X
Fruit sampling	X	X	X	X	X	X	X
Fallen Fruit Collection	X	X	X	X	X	X	X
Monitoring with lure <i>S. catenifer</i>		X	X				X
Monitoring Other Pests		X	X	X			X
Months for Approval	2	18	2	2	2	2	1

*Additional requirements Chile OWP

- **Absence of Pests**
This time without pests at any stage:
Farms: 6 months
Buffer area: 3 months
- **Traps**
Farms: 1/ 10 ha. | 20% 10 Ha
Buffer area: 1/ 50ha | 20% 10 Ha

AREA APPROVED FOR SPECIAL MARKETS

With OWP

	 Farms	 Hectares
 USA	359	10.871,23
 Argentina	263	8.732,01
 Peru	149	5.282,24
 Japan	105	4.481,73
 South Korea	30	1.088,65
 Chile	11	746,17
 China	-	-

Source: ICA
*September 2024



USA OWP

Corpohass was crucial in establishing the Operational Work Plan (OWP) with the U.S., serving as the official representative of Colombia's agroindustry and facilitating Hass avocado exports to the world's largest market.

The Corporation continues representing the industry to U.S. authorities, managing requests for new farm certifications through ICA under the country's OWP.

Corpohass also supports this through its Sustainable Productive Chains program, involving its affiliates.



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Requirements

*Average approval time: 2 months

Average cost: USD 4,000

- Application Submission
- Boundary Survey
- SH Data Upload
- Development of Property Boundary Map
- Farm characterization
- Initial Diagnosis
- Monthly Pest Monitoring
- Fruit Sampling
- Fallen Fruit Collection



FARMS WITH USA OWP

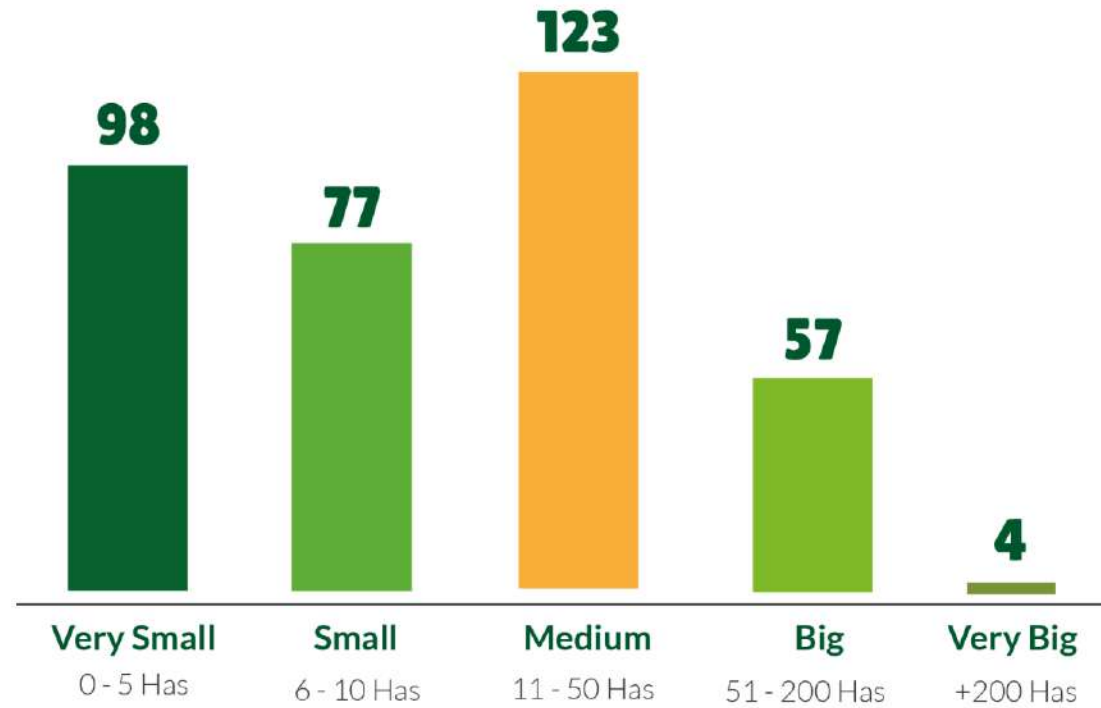
	 Farms	 Hectares
Antioquia	234	4.865,31
Caldas	48	3.187,04
Risaralda	28	893,49
Quindio	20	1.295,54
Valle del Cauca	14	404,91
Huila	8	83,45
Tolima	5	89,59
Cundinamarca	1	48,9
Cauca	1	3
	359	10.871,23

Source: ICA
*September 2024



FARMS WITH USA OWP

By Land Size

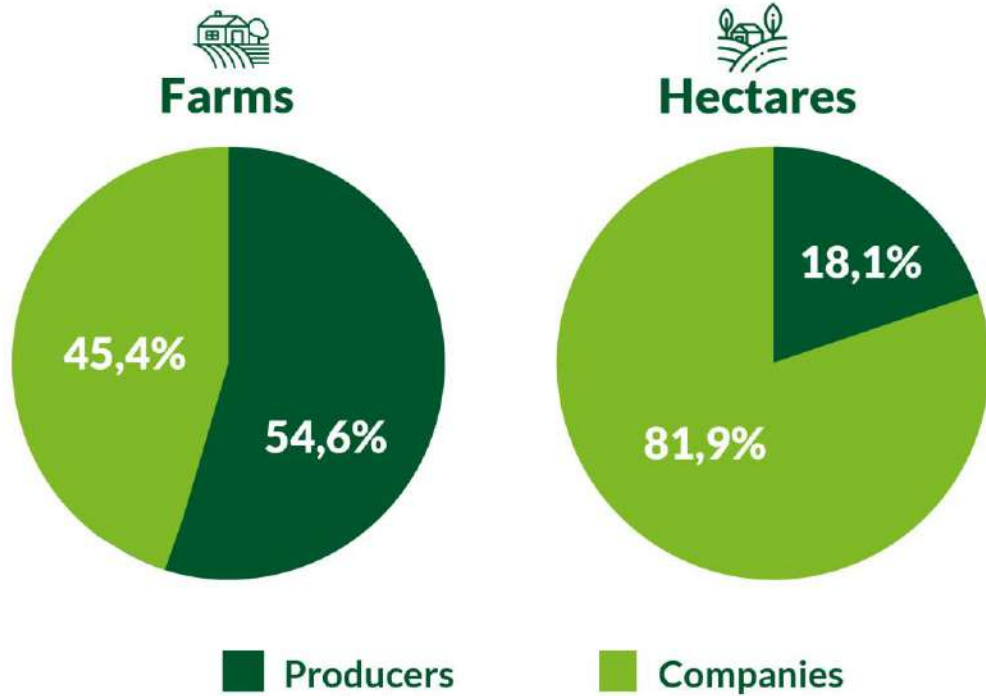


Source: ICA
*September 2024



AREA WITH USA OWP

By Producers



Source: ICA
*September 2024

AVERAGE AREA

10,6 hectares Producers

54,6 hectares Companies

21.260,98
Potential Area for
USA OWP



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CHILE OWP

The agreement between the Ministry of Agriculture of Chile, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).



The objective is to comply with Colombia's phytosanitary regulations established by Chile, following a risk mitigation systems approach, to import this fresh fruit and prevent the introduction of quarantine pests into Chile.



[Download here the official document of this OWP](#)



FARMS WITH CHILE OWP

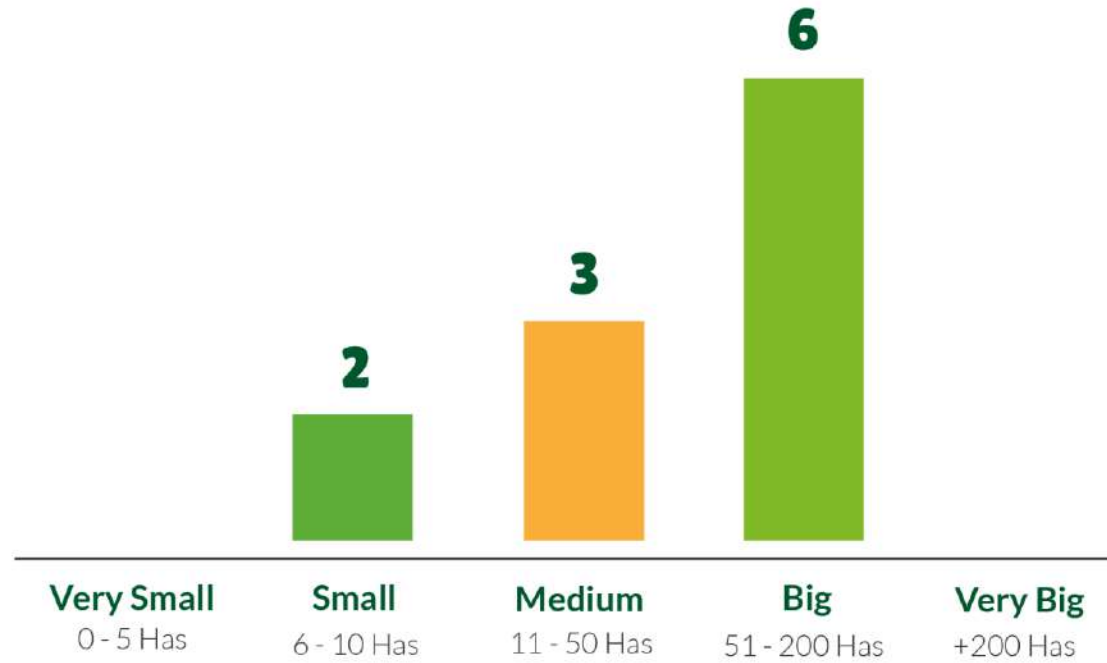
	 Farms	 Hectares
Caldas	8	531,97
Antioquia	2	53,2
Risaralda	1	161
	11	746,17

Source: ICA
*September 2024



FARMS WITH CHILE OWP

By Land Size



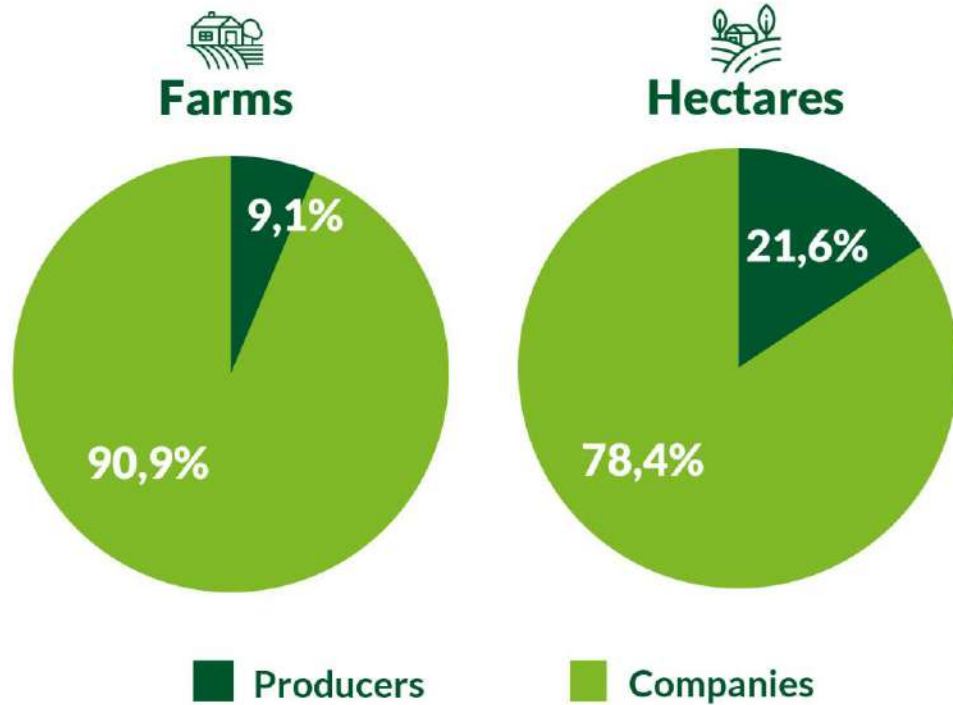
Fuente: ICA

*Corte info: septiembre 2024.



AREA WITH CHILE OWP

By Producers



Source: ICA
*September 2024

AVERAGE AREA

161 hectares Producers **58,52** hectares Companies

31.386,04
Potencial Area for Chile OWP



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ARGENTINA OWP

The agreement between the National Service for Agri-Food Health and Quality, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).

The objective is to comply with Colombia's phytosanitary regulations established by Argentina, following a risk mitigation systems approach, to import this fresh fruit and prevent the introduction of quarantine pests into Argentina.



[Download here the official document of this OWP](#)



FARMS WITH ARGENTINA OWP

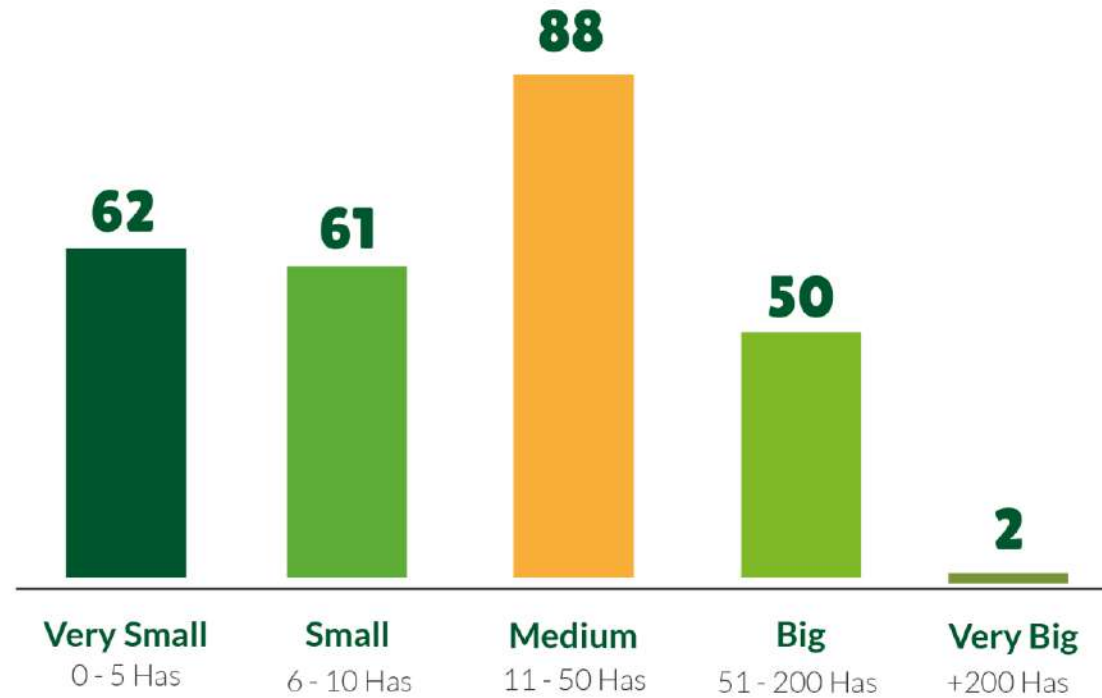
	 Farms	 Hectares
Antioquia	203	4.571,92
Caldas	29	2.414,42
Quindio	12	848,50
Risaralda	11	631,30
Tolima	3	84,07
Huila	2	18,30
Valle del Cauca	1	153
Cauca	2	10,5
	263	8.732,01

Source: ICA
*September 2024



FARMS WITH ARGENTINA OWP

By Land Size

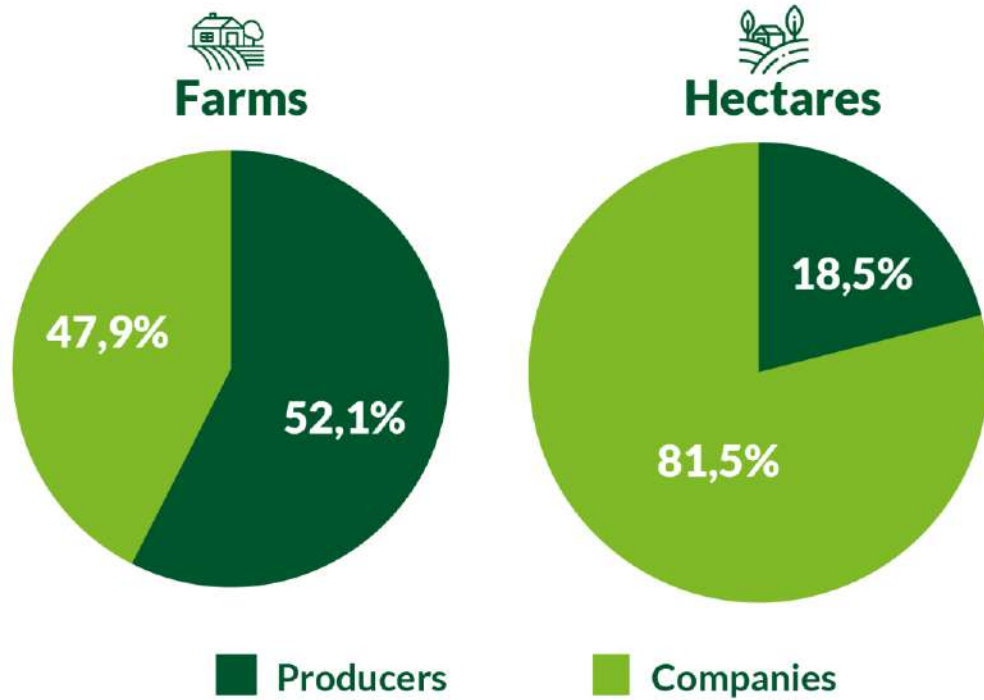


Source: ICA
*September 2024



AREA WITH ARGENTINA OWP

By Producers



Source: ICA
*September 2024

AVERAGE AREA
11,8 hectares Producers
56,47 hectares Companies

23.400,2
Potencial Area for Argentina OWP



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PERU OWP

The agreement between the National Agricultural Health Service, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).



The objective is to comply with Colombia's phytosanitary regulations established by Peru, following a risk mitigation systems approach, to import this fresh fruit and prevent the introduction of quarantine pests into Peru.



[Download here the official document of this OWP](#)



FARMS WITH PERU OWP

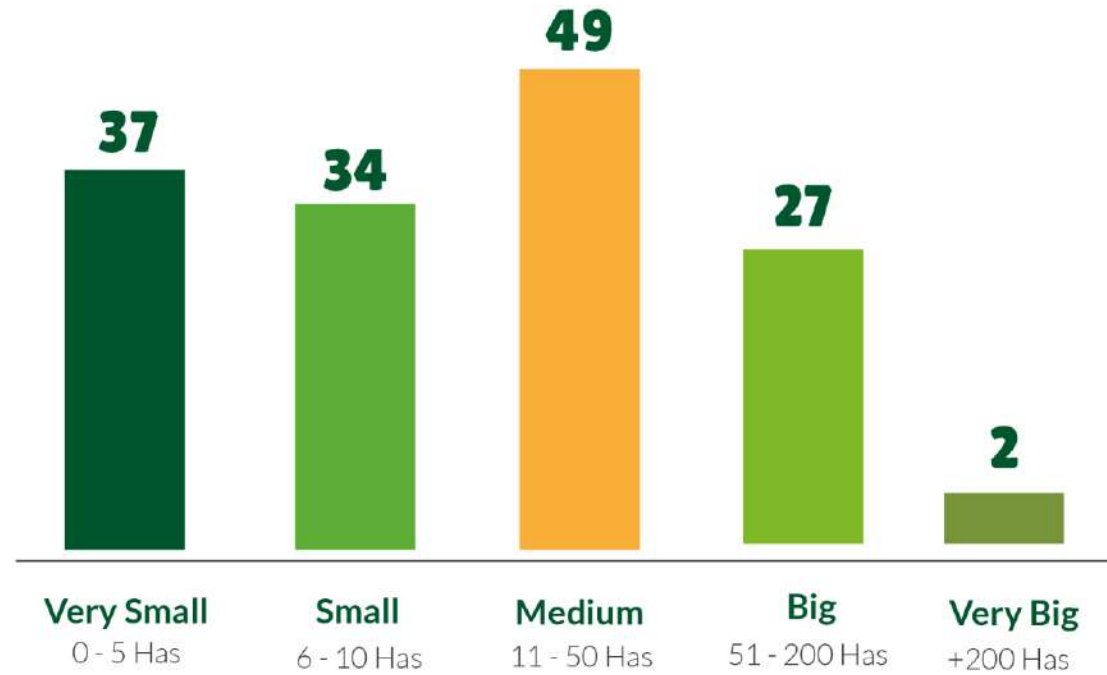
	 Farms	 Hectares
Antioquia	127	3.233,78
Caldas	18	1.379,46
Quindio	2	443
Valle del Cauca	1	153
Tolima	1	73
	149	5.282,24

Source: ICA
*September 2024



FARMS WITH PERU OWP

By Land Size

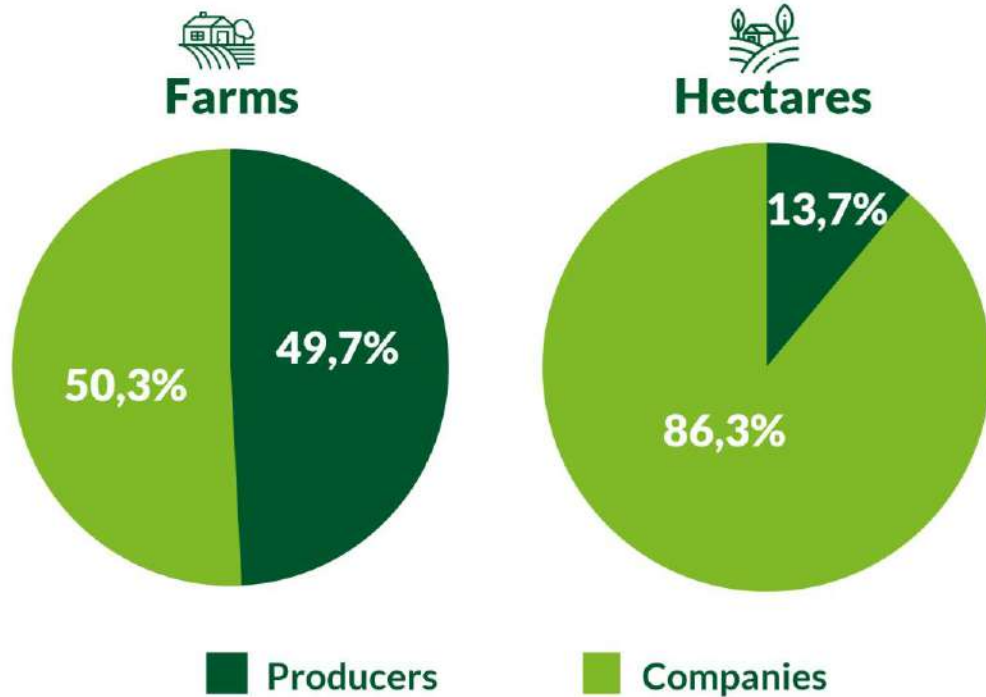


Source: ICA
*September 2024



AREA WITH PERU OWP

By Producers



Source: ICA
*September 2024

AVERAGE AREA

9,77 hectares Producers	60,79 hectares Companies
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26.849,97
Potencial Area for Peru PWP



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CHINA OWP

The agreement between the General Customs Administration of the People's Republic of China, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).

The objective is to comply with Colombia's phytosanitary regulations established by China, following a risk mitigation systems approach, to import this fresh fruit and prevent the introduction of quarantine pests into China.



[Download here the official document of this OWP](#)



FARMS WITH CHINA OWP



ICA awaits a response from MAFF, China's phytosanitary authority, about the farms and packing plants authorized to export to this country (2024 - 2025)



JAPAN OWP

The agreement between the Ministry of Agriculture, Forestry and Fisheries -MAFF-, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).



The objective is to comply with Colombia's phytosanitary regulations established by Japan, following a risk mitigation systems approach, to import this fresh fruit and prevent the introduction of quarantine pests into Japan.



[Download here the official document of this OWP](#)



FARMS WITH JAPAN OWP

	 Farms	 Hectares
Antioquia	74	2.063,1
Caldas	9	708,19
Quindio	7	688,3
Valle del Cauca	5	797,99
Risaralda	5	149,6
Huila	4	71,55
Cauca	1	3
	105	4.481,73

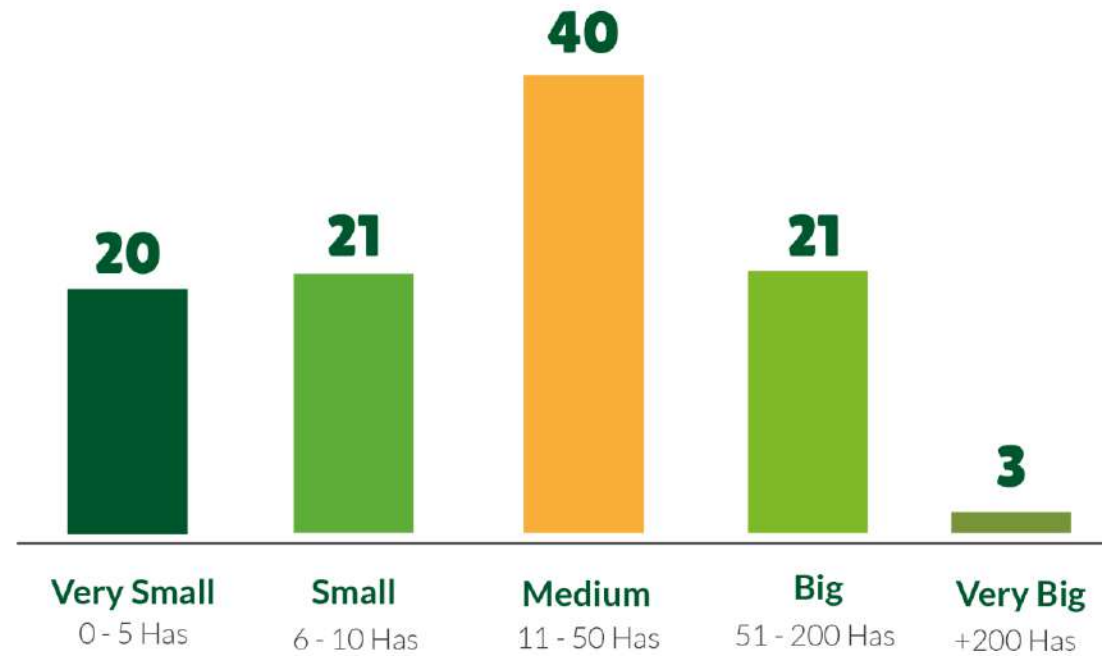
Source: ICA

*September 2024



FARMS WITH JAPAN OWP

By Land Size

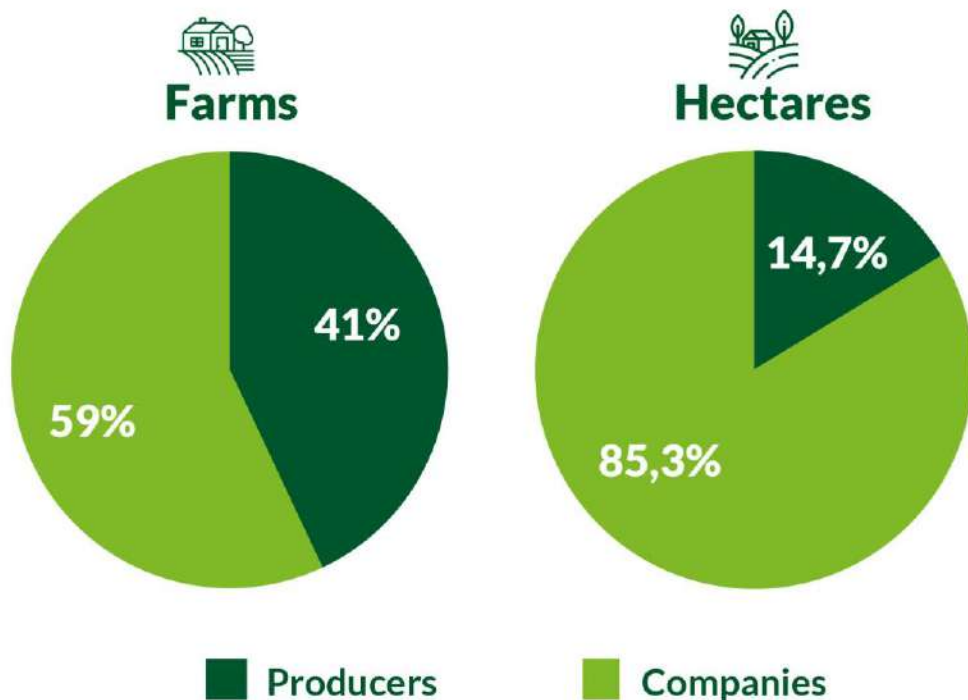


Source: ICA
*September 2024



AREA WITH JAPAN OWP

By Producers



Source: ICA
*September 2024

AVERAGE AREA
15,36 hectares Producers
60,64 hectares Companies

27.650,48
Potencial Area for Japan OWP



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SOUTH KOREA OWP

The agreement between the phytosanitary authorities, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).

The objective is to comply with Colombia's phytosanitary regulations established by South Korea, following a risk mitigation systems approach, to import this fresh fruit and prevent the introduction of quarantine pests into South Korea.



[Download here the official document of this OWP](#)



FARMS WITH SOUTH KOREA OWP

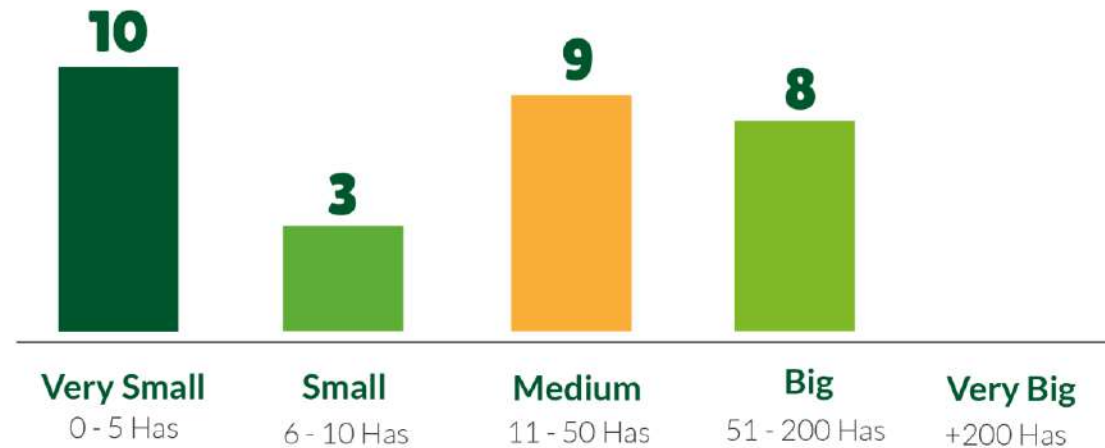
	 Farms	 Hectares
Antioquia	26	719,45
Risaralda	4	369,2
	30	1.088,65

Source: ICA
*September 2024



FARMS WITH SOUTH KOREA OWP

By Land Size

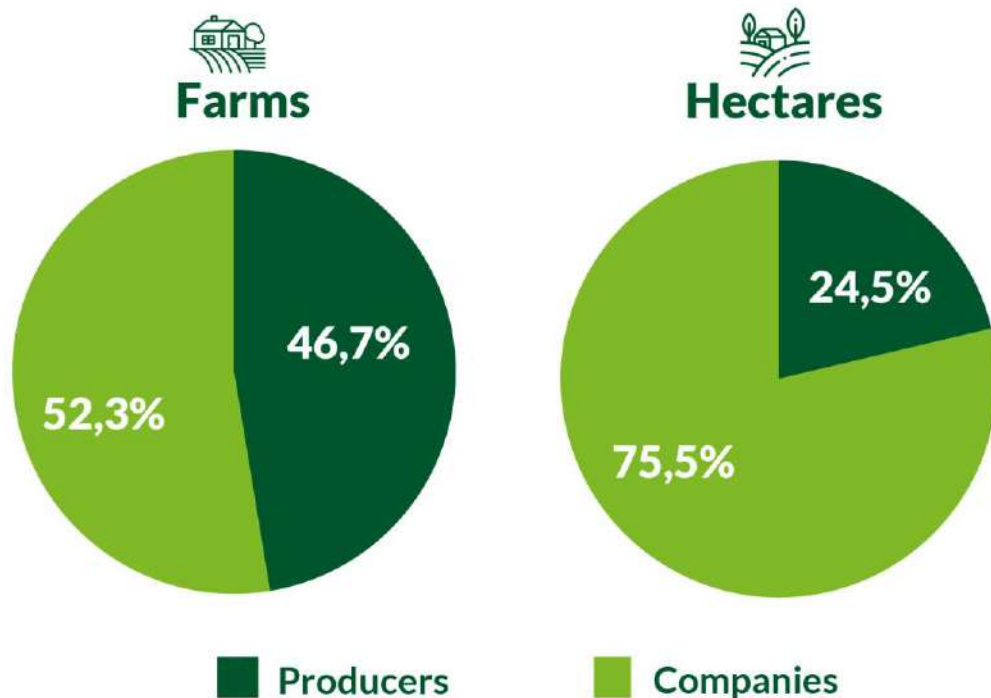


Source: ICA
*September 2024



AREA WITH SOUTH KOREA OWP

By Producers



Source: ICA
*September 2024

AVERAGE AREA
19,06 hectares Producers
51,36 hectares Companies

31.043,56
Potencial Area for South Korea OWP



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EXPORTS



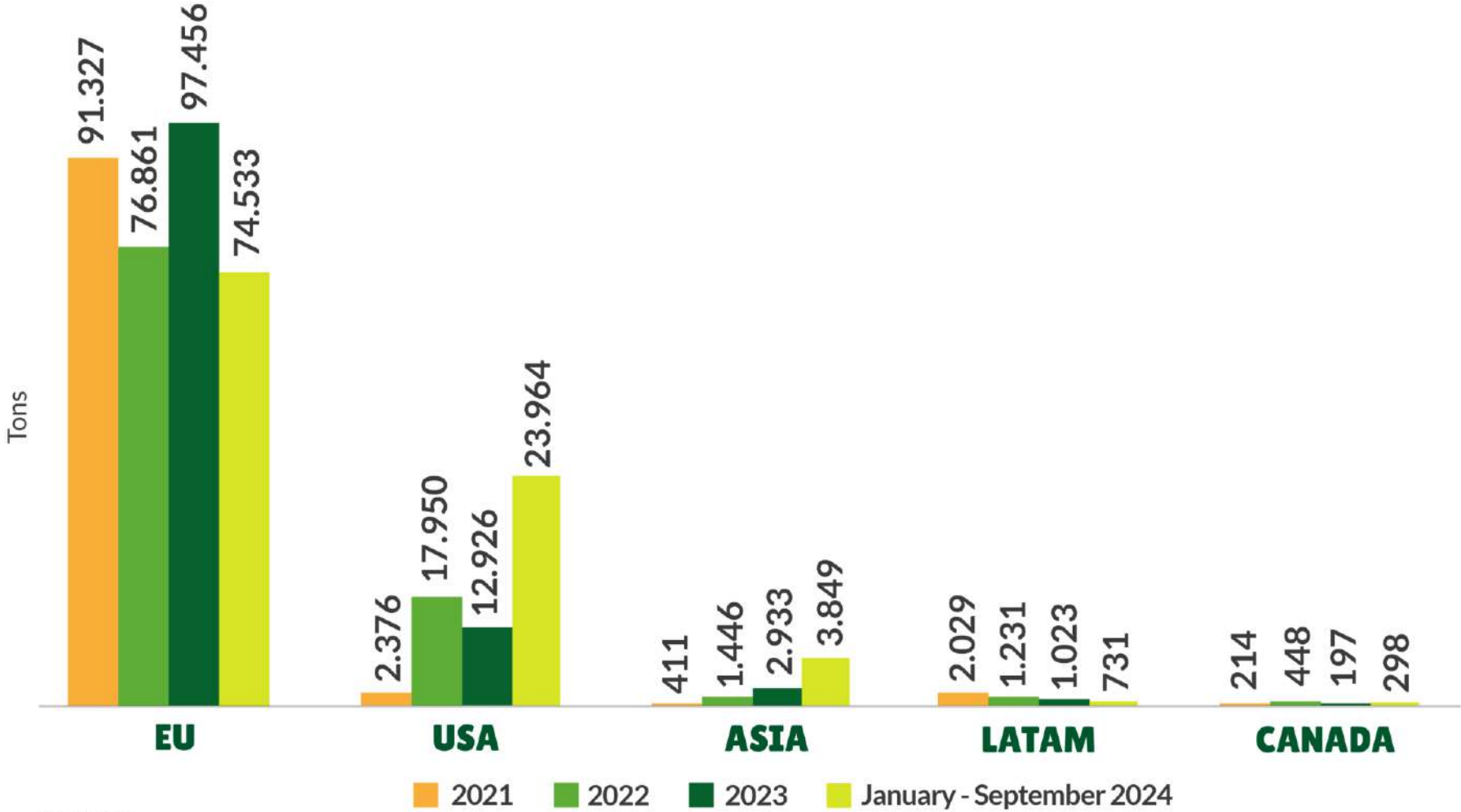
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EXPORT DESTINATIONS

Avocados from Colombia



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Source: Dian

Main Markets

EU | EUROPEAN UNION



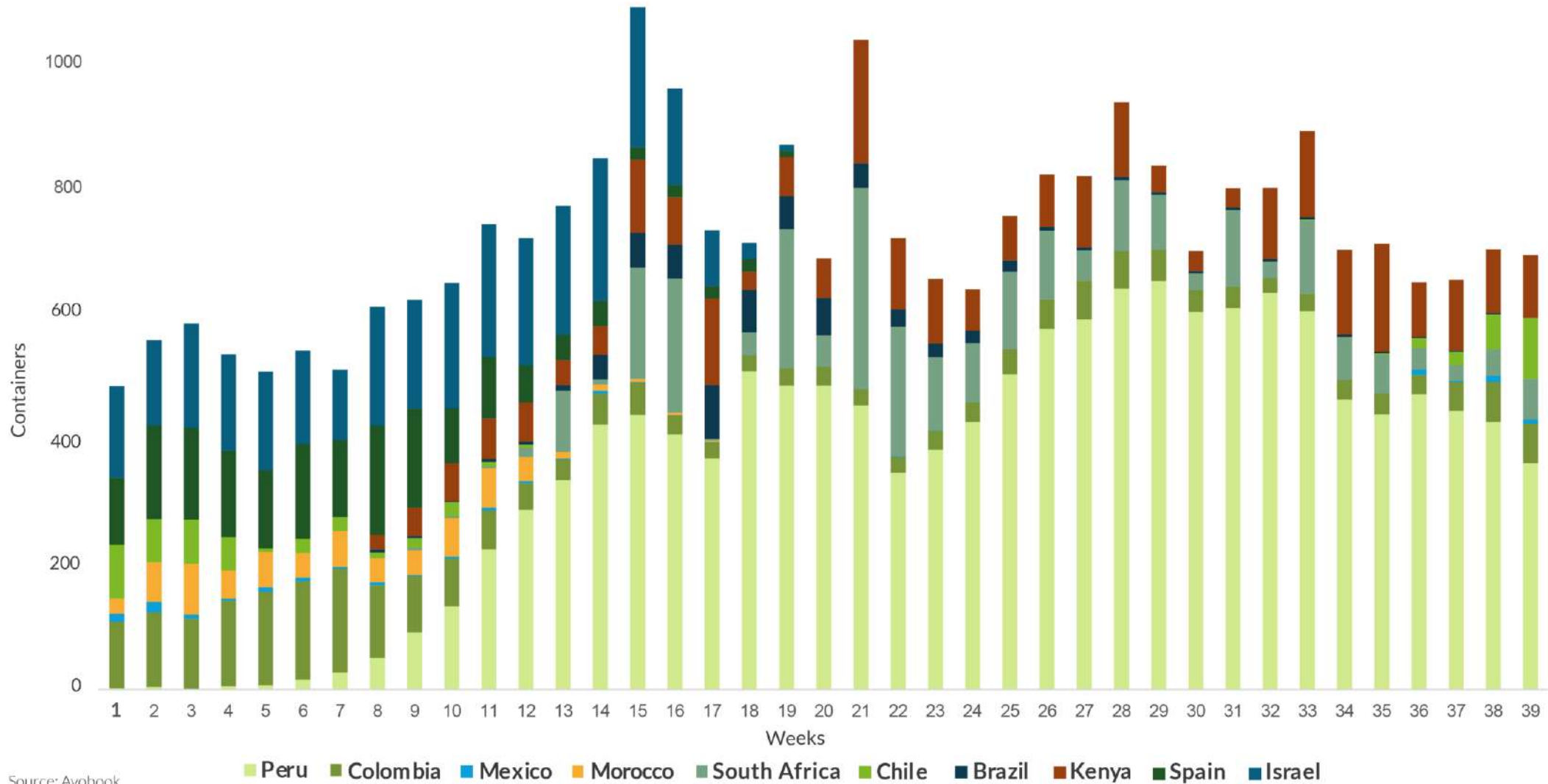
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EU SUPPLIERS

January - September 2024



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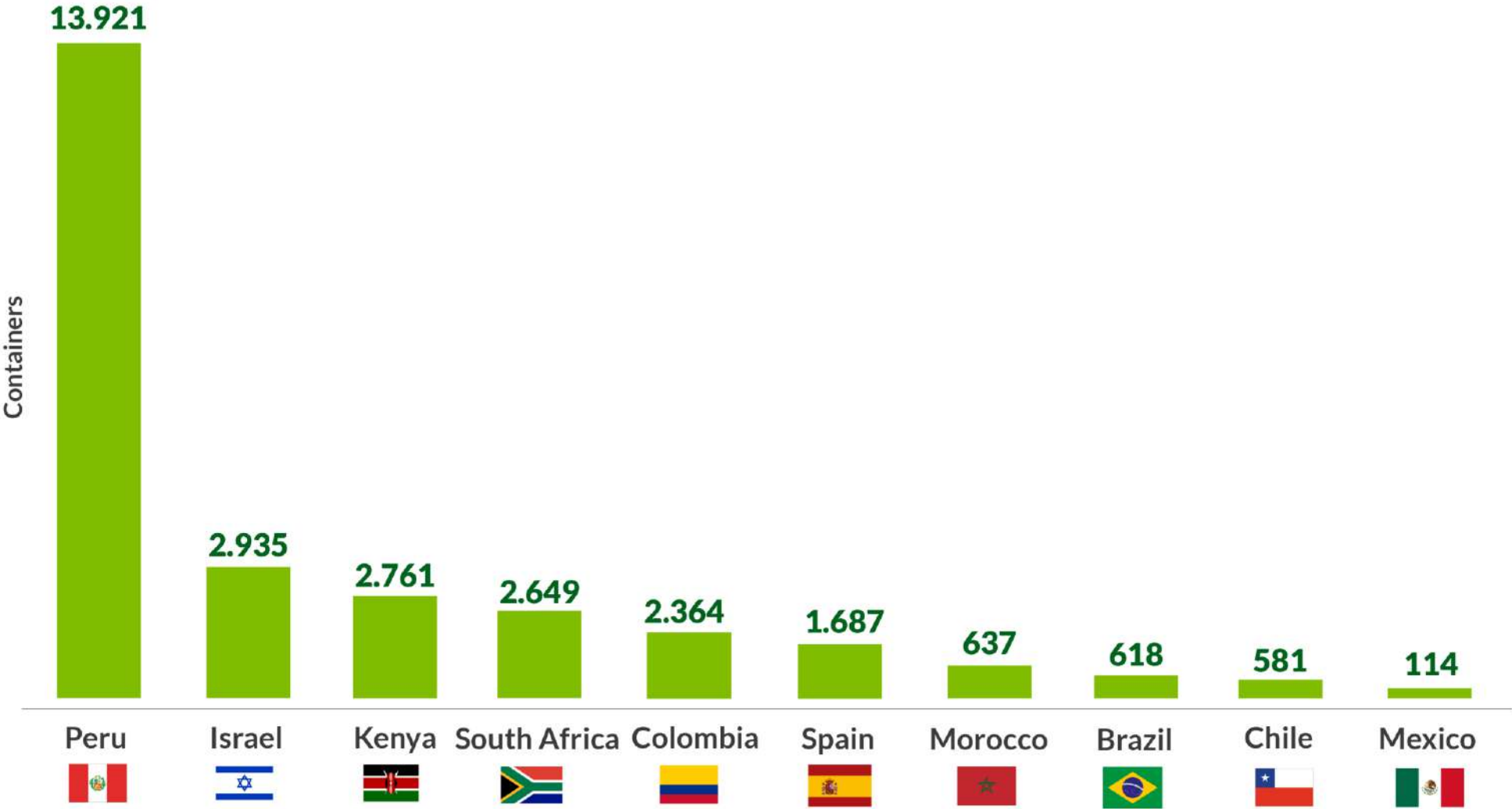
Source: Avobook

EU SUPPLIERS

January - September 2024



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Source: Avobook

EXPORTS TO EUROPEAN COUNTRIES

Tons

		Tons			
		2021	2022	2023	JAN – SEP 2024
	Netherlands	50.086	46.764	53.472	44.288
	Spain	11.807	9.236	13.996	7.125
	UK	11.521	10.727	12.459	8.319
	Belgium	5.893	3.264	5.579	8.181
	Germany	3.646	2.724	5.407	3.140
	France	5.462	2.239	5.257	2.432
	Others	2.914	1.907	1.286	1.048
		91.329	76.861	97.456	74.533

Source: Dian

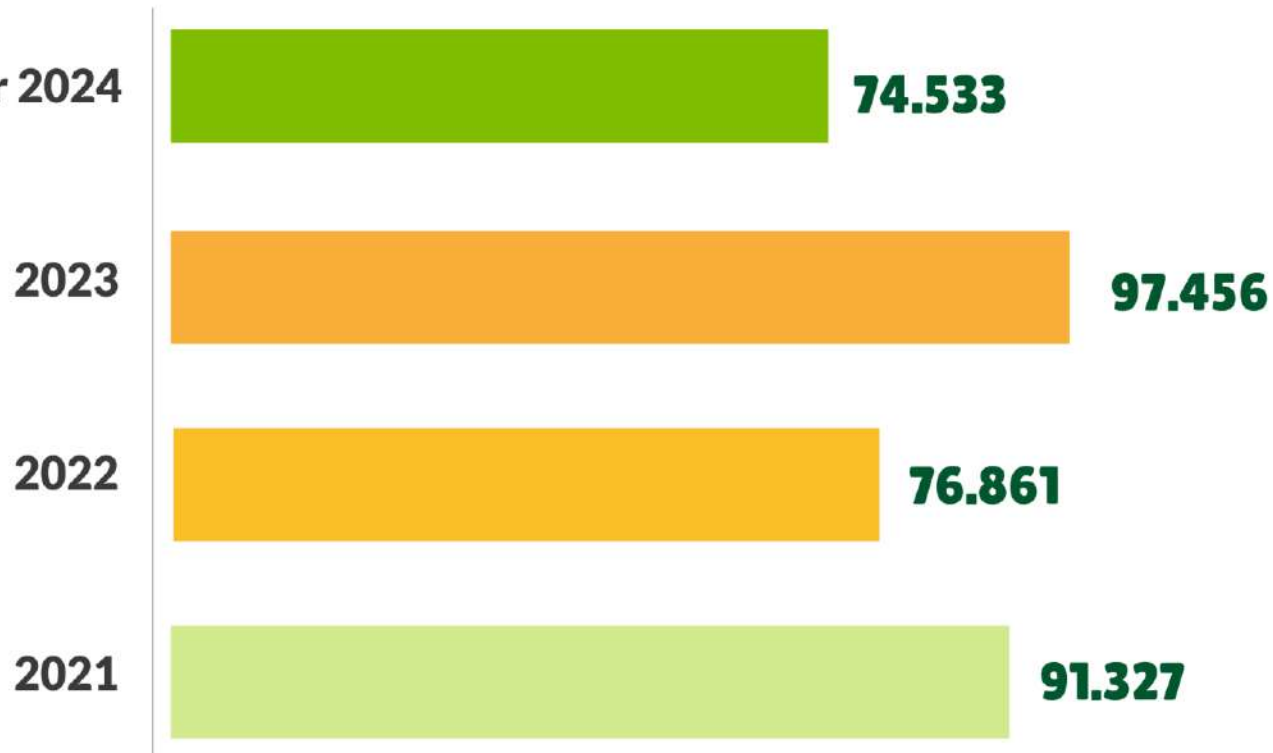
EXPORTS TO EU

Tons



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January - September 2024



Source: Dian

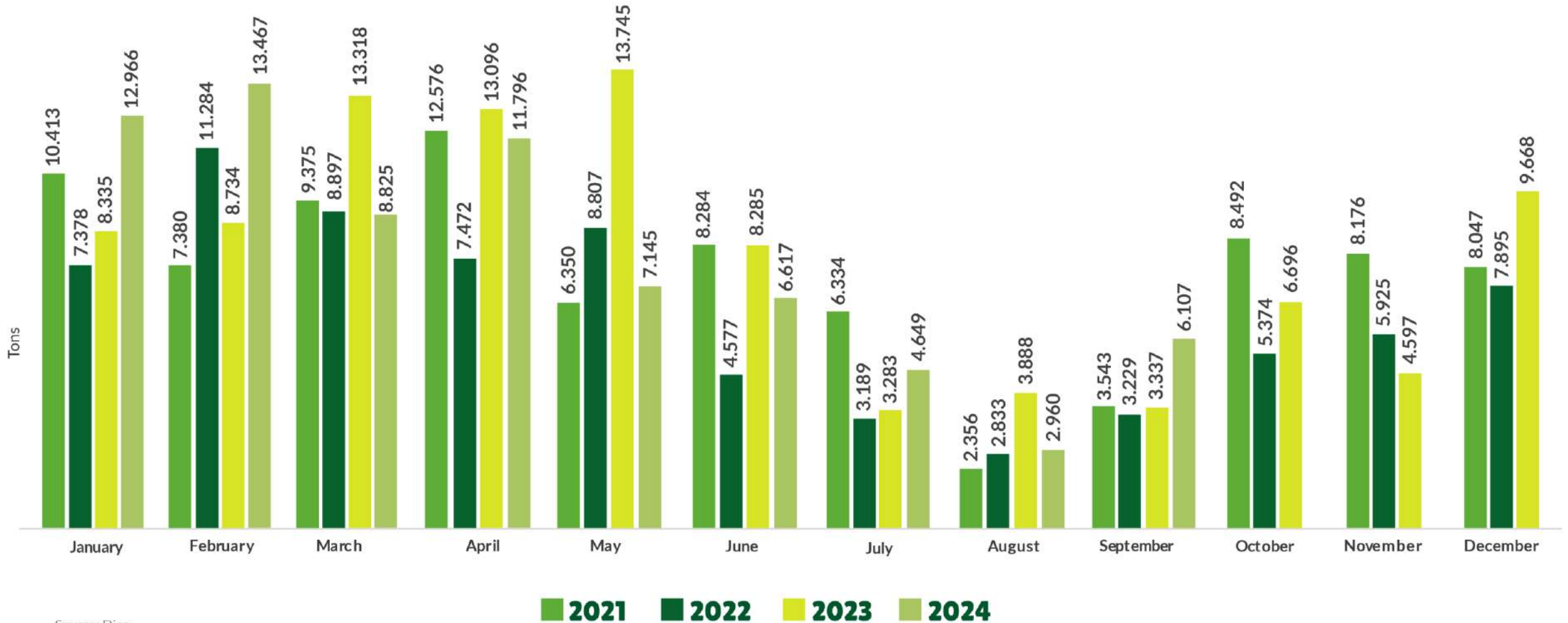
Tons

EXPORTS TO EU

Tons | Month



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Source: Dian

Main Markets

USA



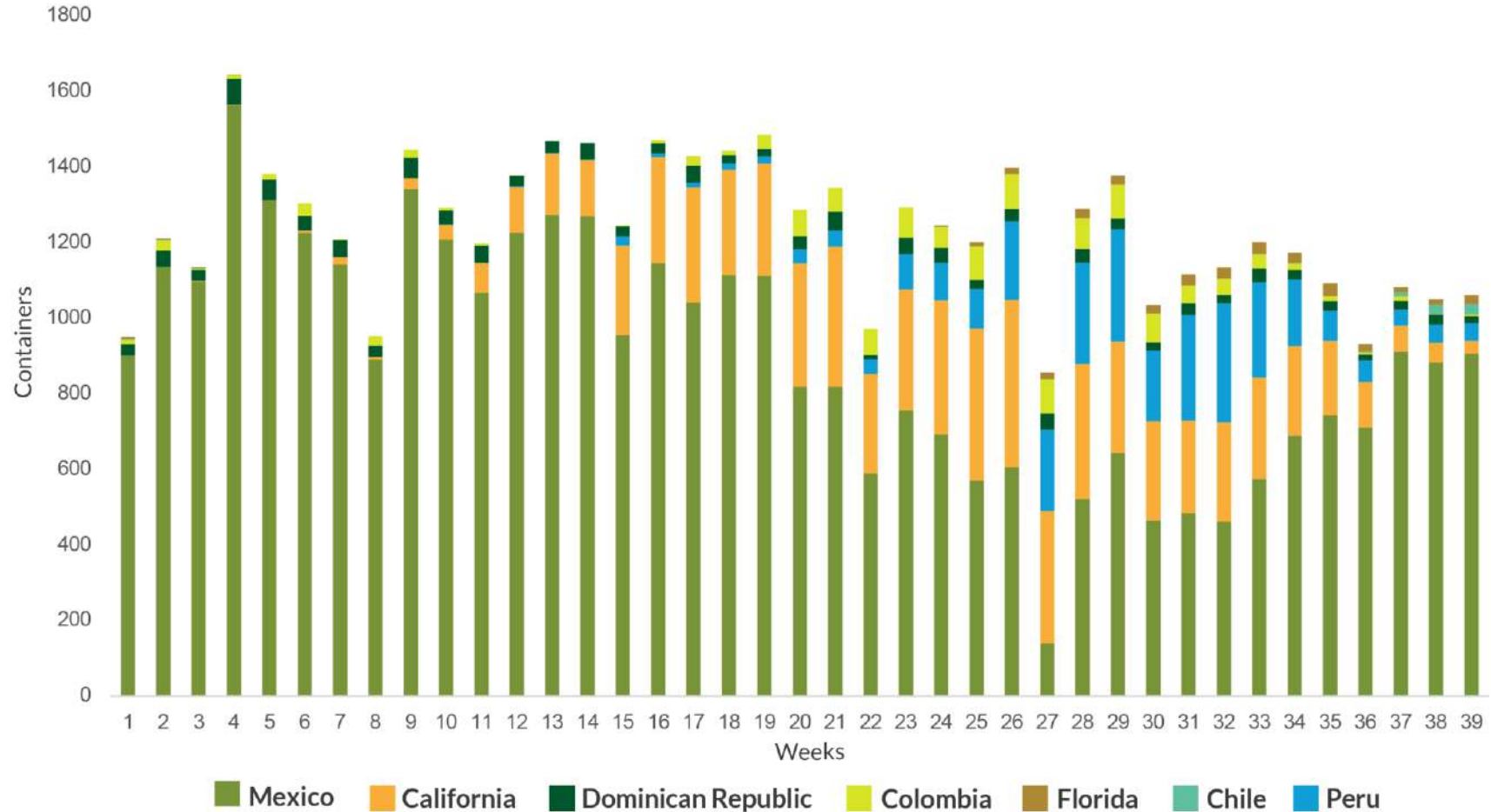
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USA SUPPLIERS

January - September 2024



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Source: USDA

USA SUPPLIERS

January - September 2024



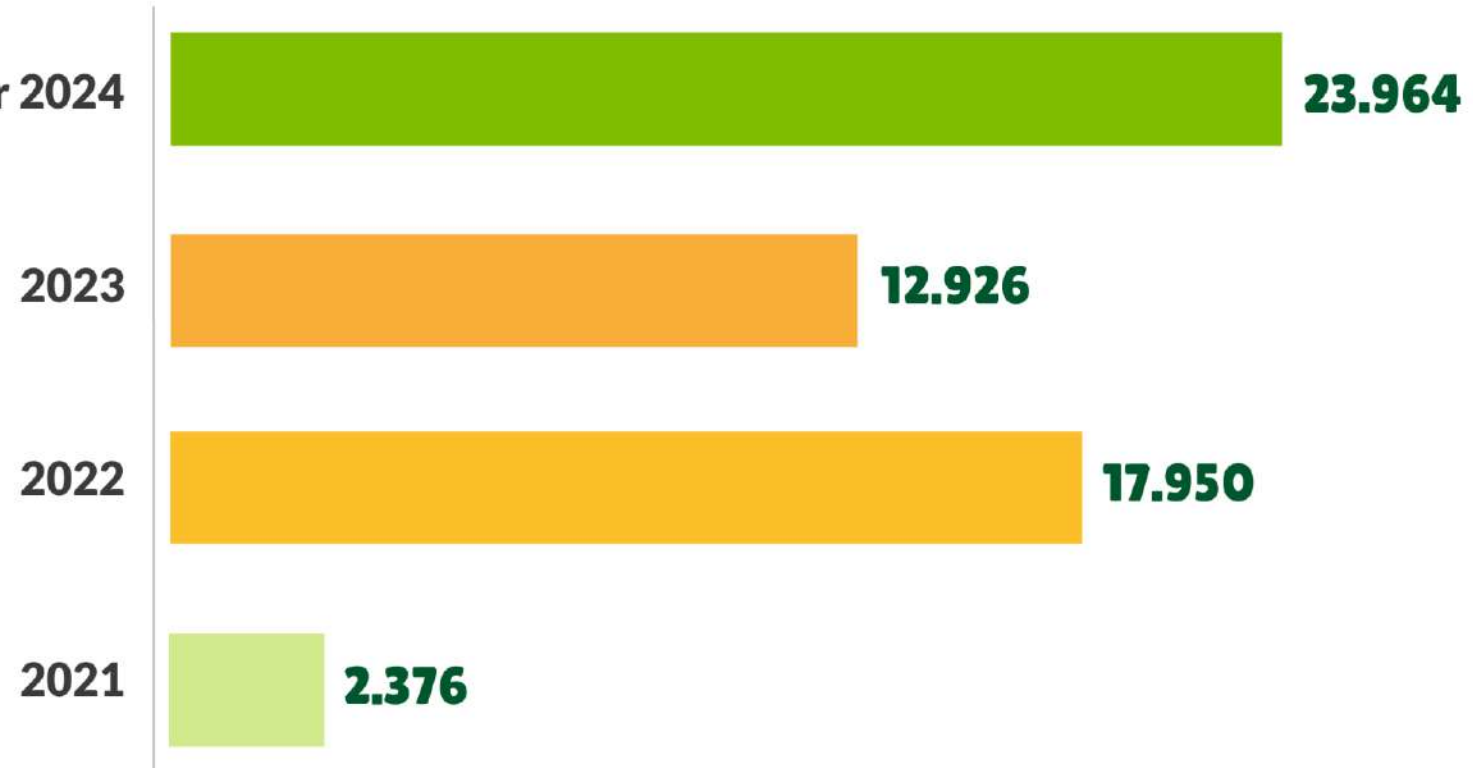
Source: USDA

*Guatemala will be in this market in 2025. Corpohass will analyze its exports.

EXPORTS TO USA

Tons

January - September 2024

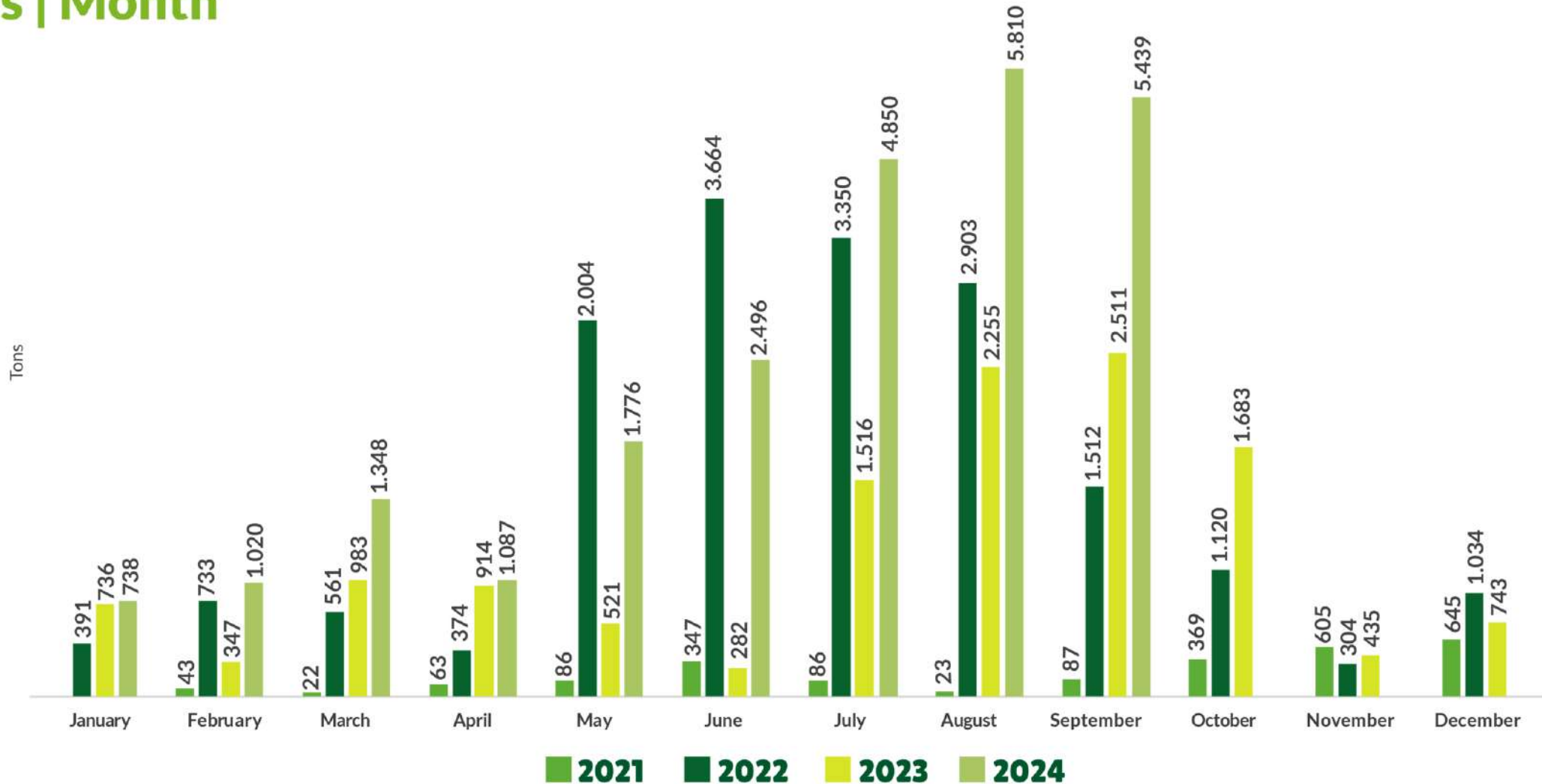


Tons

Source: Dian

EXPORTS TO USA

Tons | Month



Source: Dian

USA PORTS

Avocados from Colombia



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	% Reception
Philadelphia	66,3%
Port Everglades	17%
Miami	14,3%
Los Angeles	1,4%
Others	1%

Sources: USDA | Sicex
*January - September 2024

Main Markets

ASIA








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EXPORTS TO ASIAN COUNTRIES

Tons



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	Tons			
	2021	2022	2023	JAN – SEP 2024
 Hong Kong		654	2.442	96
 United Arab Emirates	148	272	188	178
 Japan	36	206		
 China	55	88	117	2.376
 Saudi Arabia	138	84	76	124
 South Korea	2	74	92	0
Others	31	67	18	75
	411	1.446	2.933	2.849

Source: Dian

EXPORTS TO ASIA

Tons



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January - September 2024



2.849

2023



2.933

2022



1.446

2021



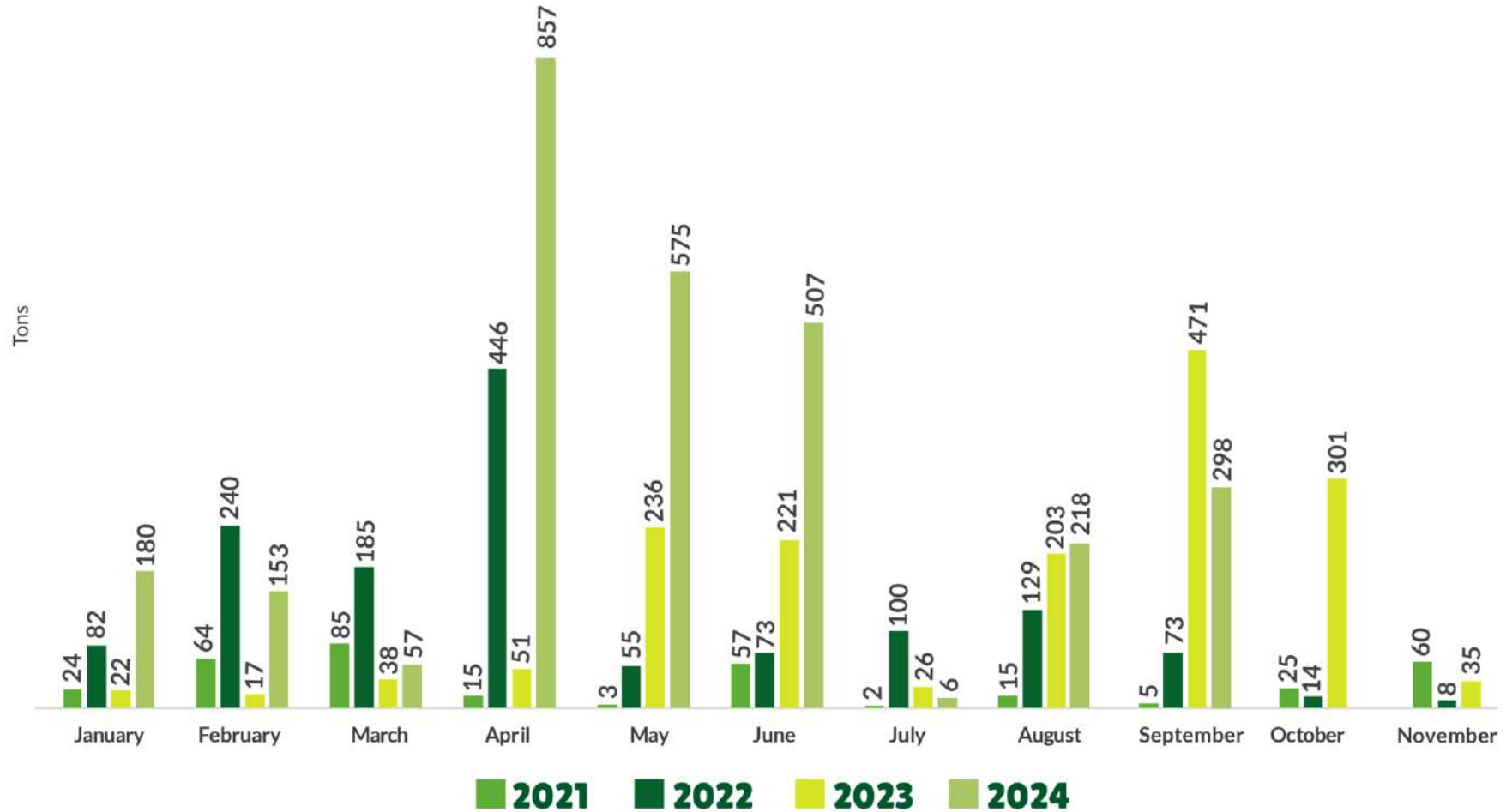
411

Tons

Source: Dian

EXPORTS TO ASIA

Tons | Month



Source: Dian

Main Markets

LATAM



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EXPORTACIONES A PAÍSES LATAM

Toneladas

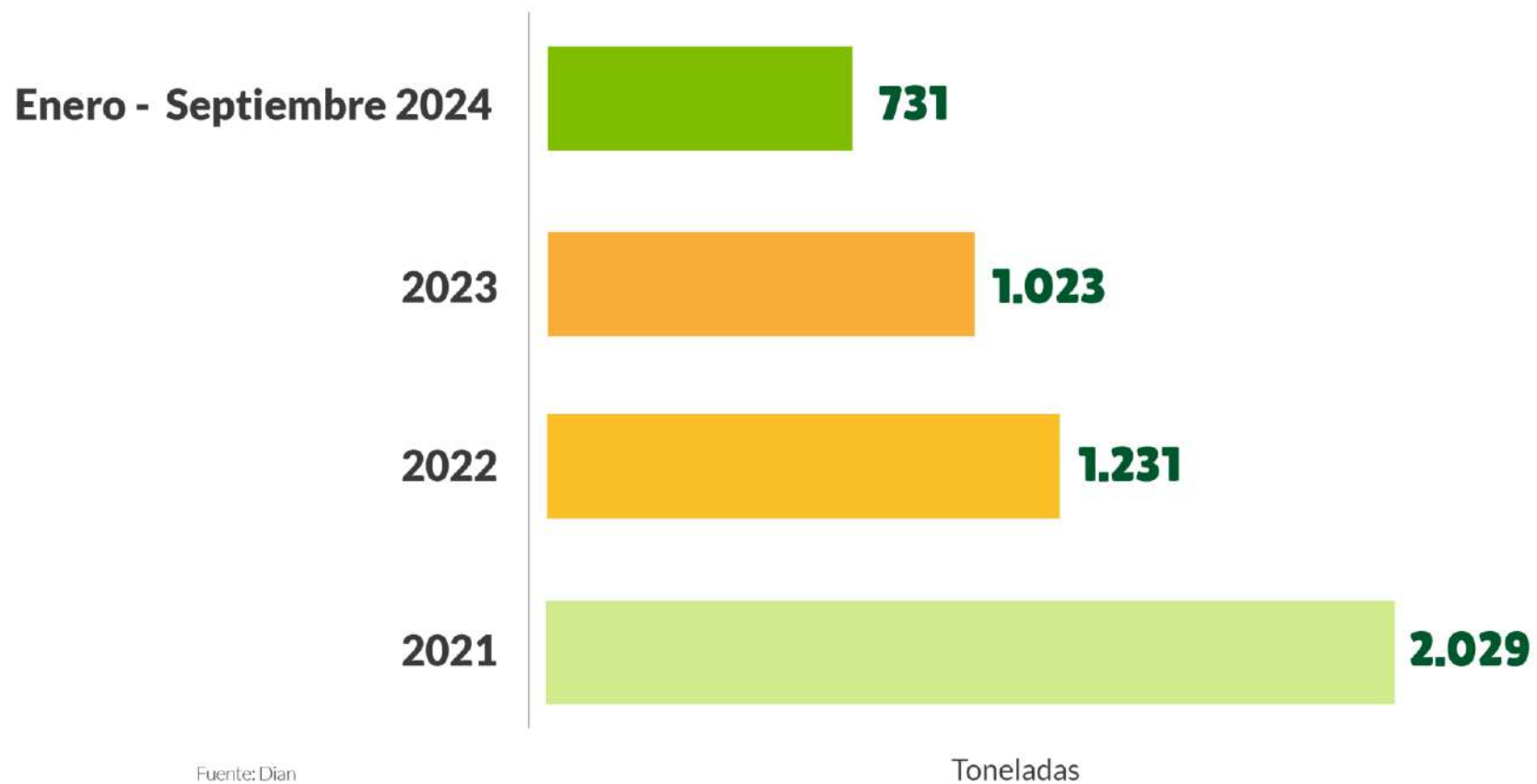
	Toneladas			
	2021	2022	2023	ENE – SEP 2024
 Argentina	1.031	455	563	84
 Chile	66	24	351	120
 Costa Rica	889	657	46	214
 Guatemala		24		72
 México		24		
 Panamá	42	47	63	73
 Perú	0,5			168
	2.029	1.231	1.023	731

EXPORTACIONES A LATAM

Toneladas

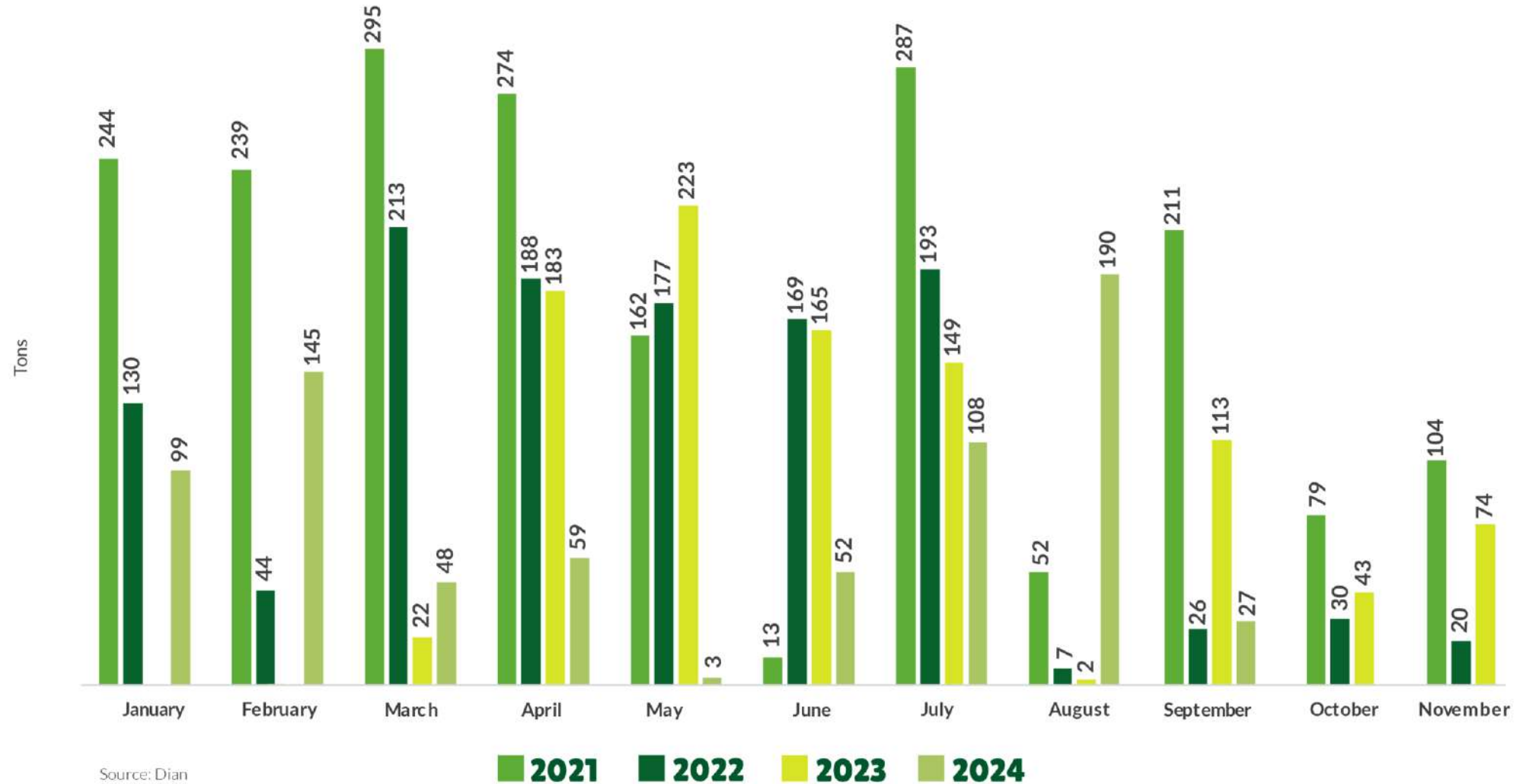


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EXPORTS TO LATAM

Tons | Month



Main Markets

CANADA



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EXPORTS TO CANADA

Tons



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January - September 2024

297

2023

197

2022

448

2021

215

Tons

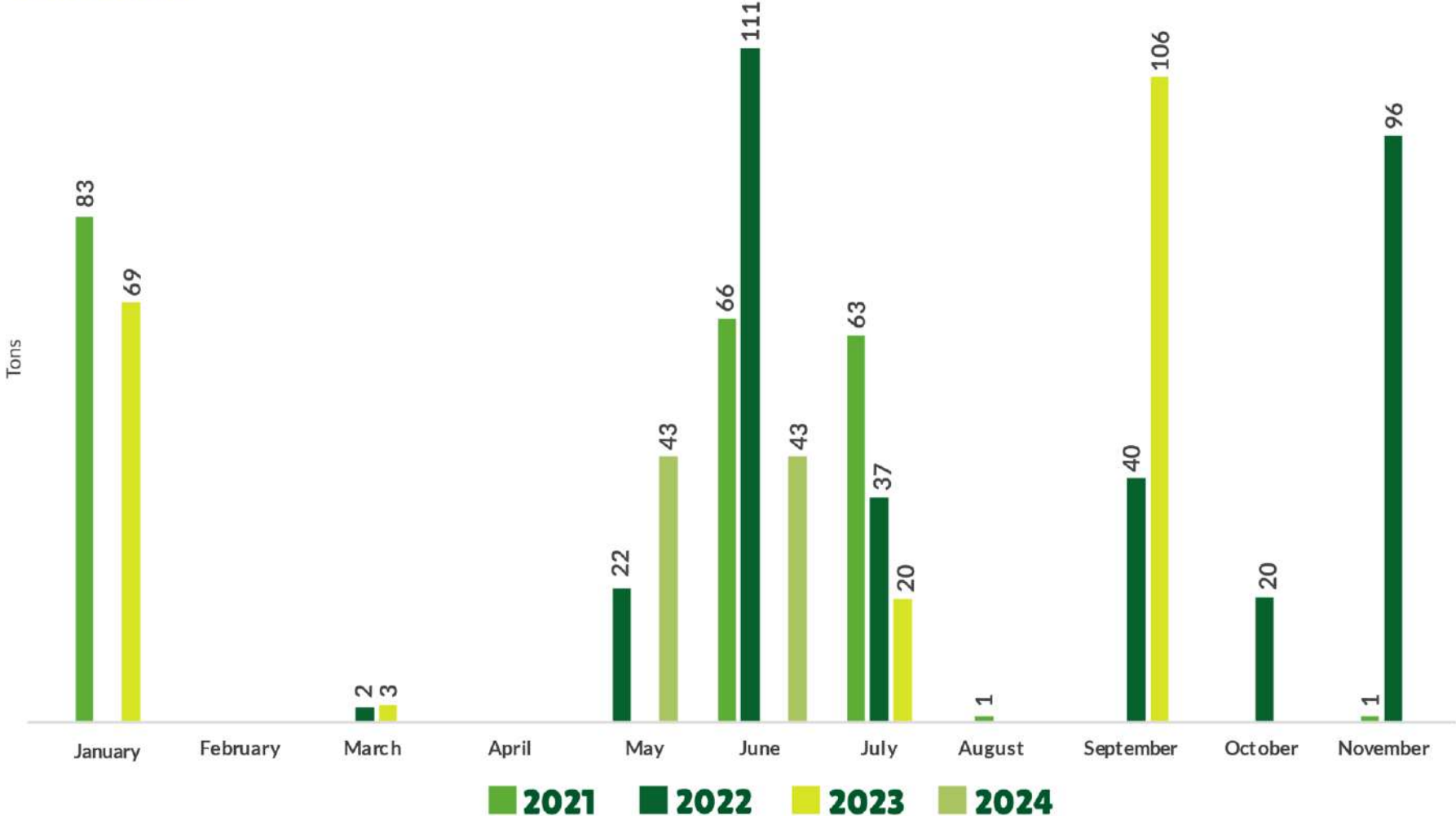
Source: Dian

EXPORTS TO CANADA

Tons | Month



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Source: Dian

¡Muchas gracias!

     @corpohass

 corpohass.com



AVOCADOS
FROM
COLOMBIA

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