

SECTOR REPORT

Q2 | 2024



AVOCADOS
FROM
COLOMBIA

Sustainability from the heart

corpohass



Sustainability from the heart

corpohass

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 June).

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

AGRICULTURE'S CONTRIBUTION to Colombia's GDP



corpohass



Figures in billions of pesos

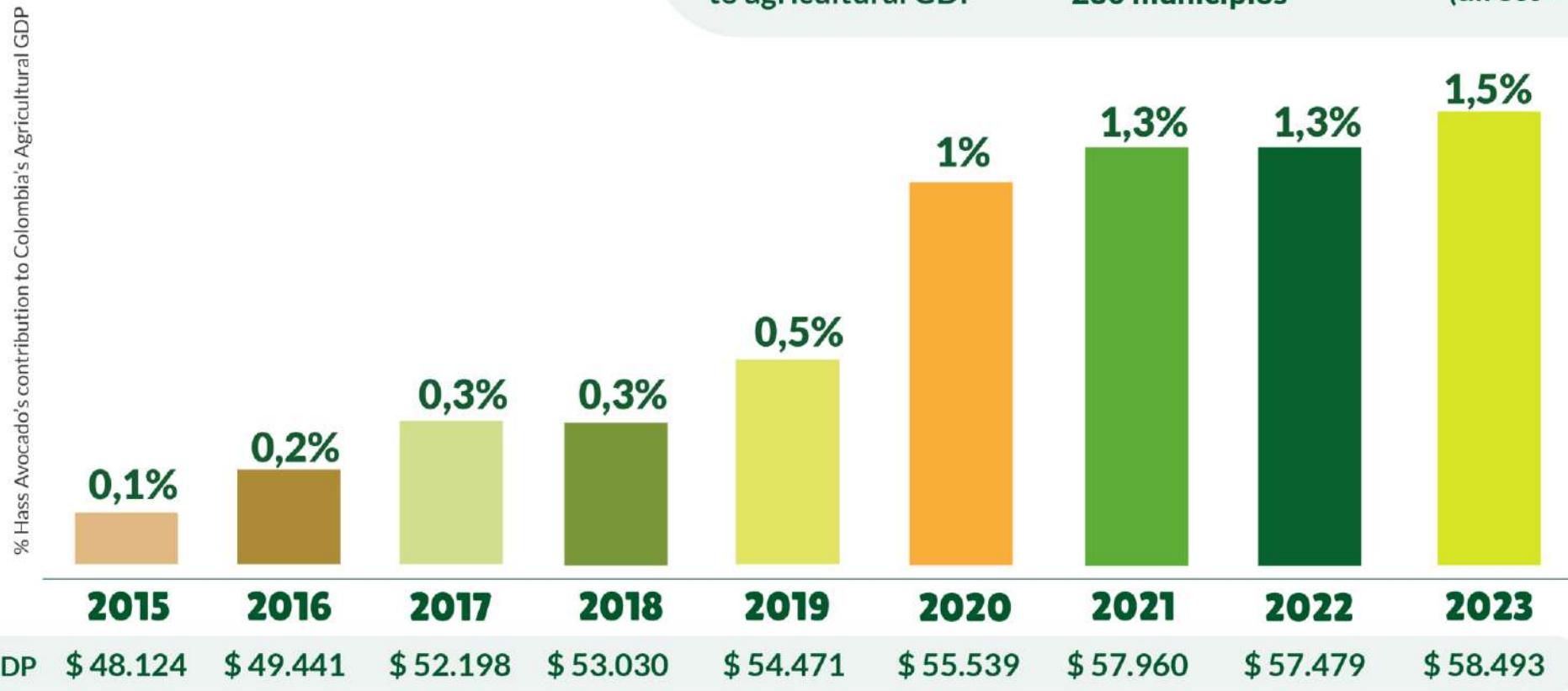
Source: Dane

HASS AVOCADO'S CONTRIBUTION to Colombia's Agricultural GDP



corpohass

+150% Hass contributions to agricultural GDP
16 departments Hass Avocado Producers
230 municipios
61.063 jobs created by the agroindustry (direct + indirect)



Figures in billions of pesos

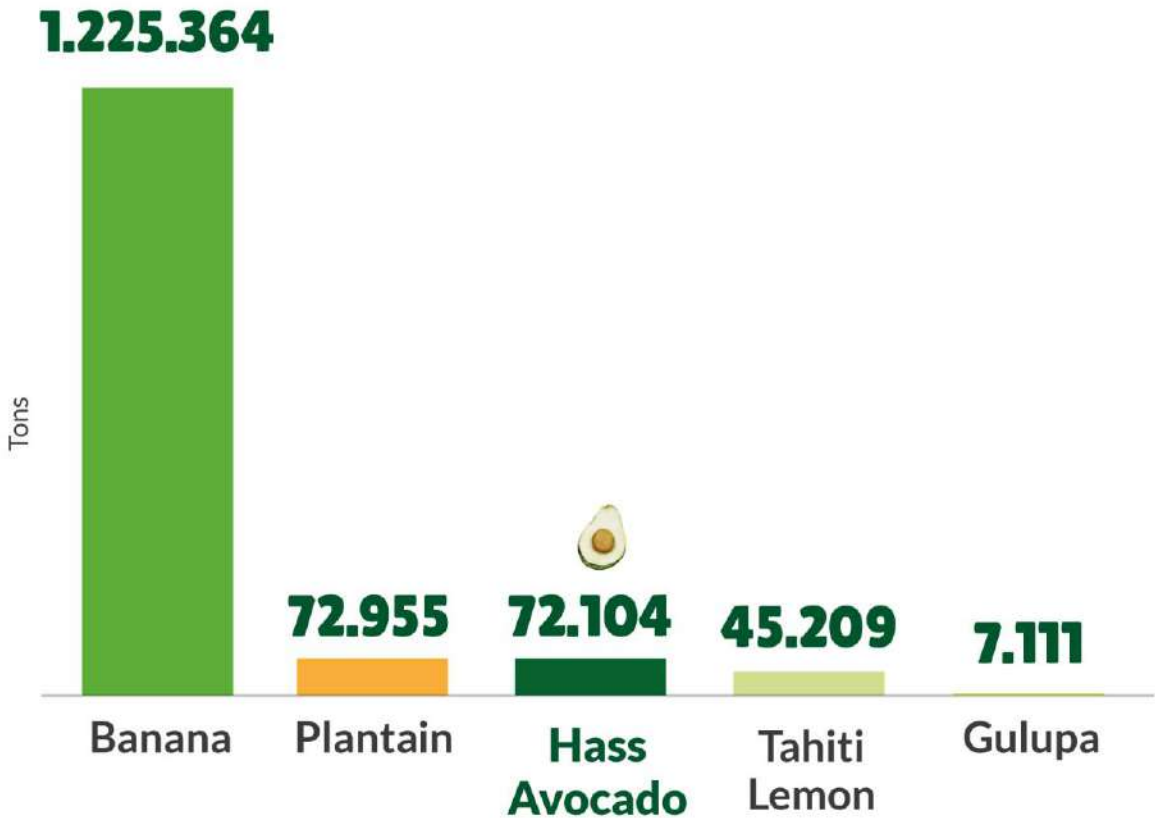
OPEN MARKETS

Avocados from Colombia



COLOMBIAN FRUIT EXPORTS

January - June 2024



Source: Dian

USD \$151.083.193
Income generated
by Hass Avocado
January - June 2024



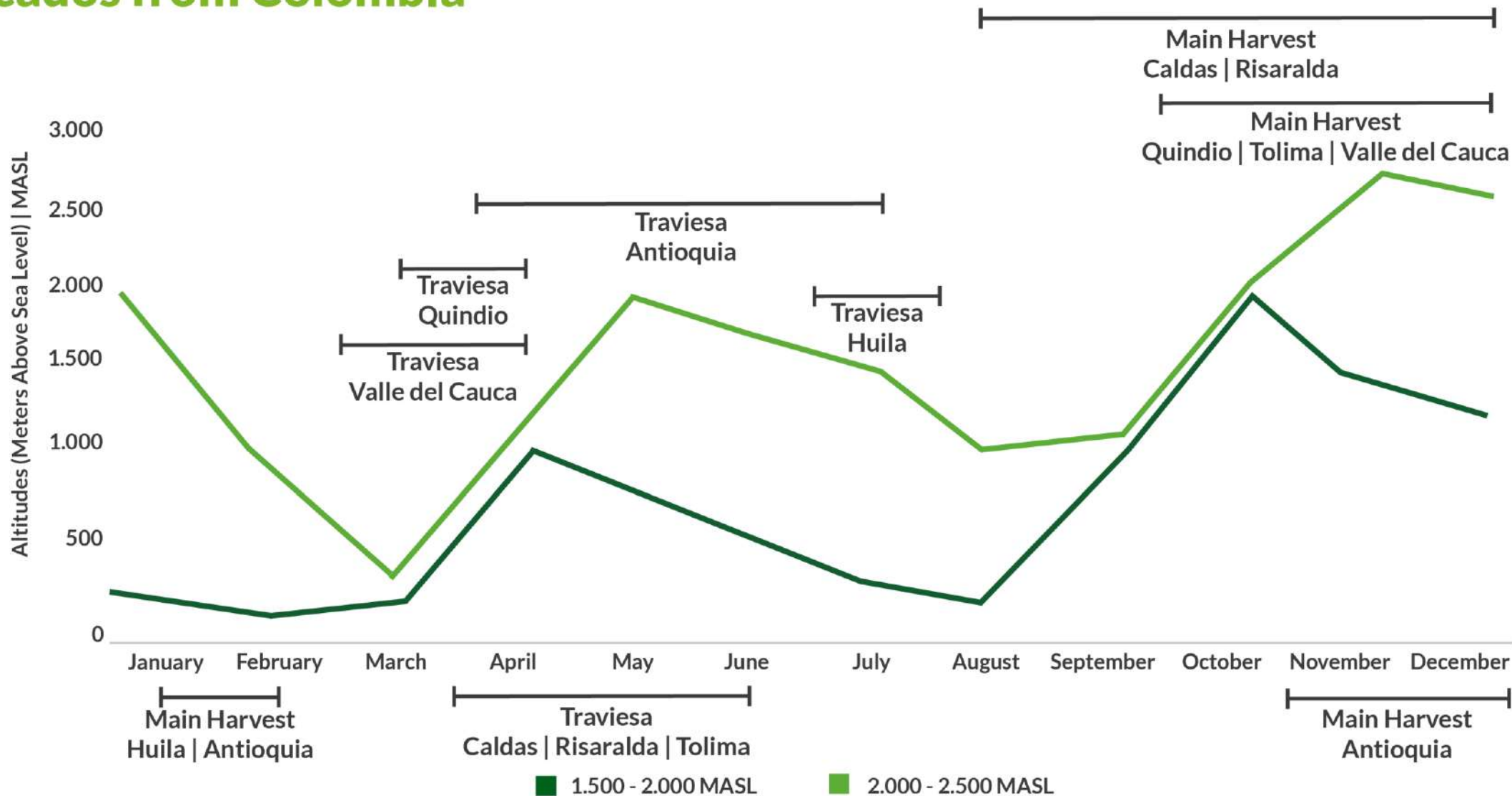
corpohass

HARVEST SEASONS

Avocados from Colombia



corpohass

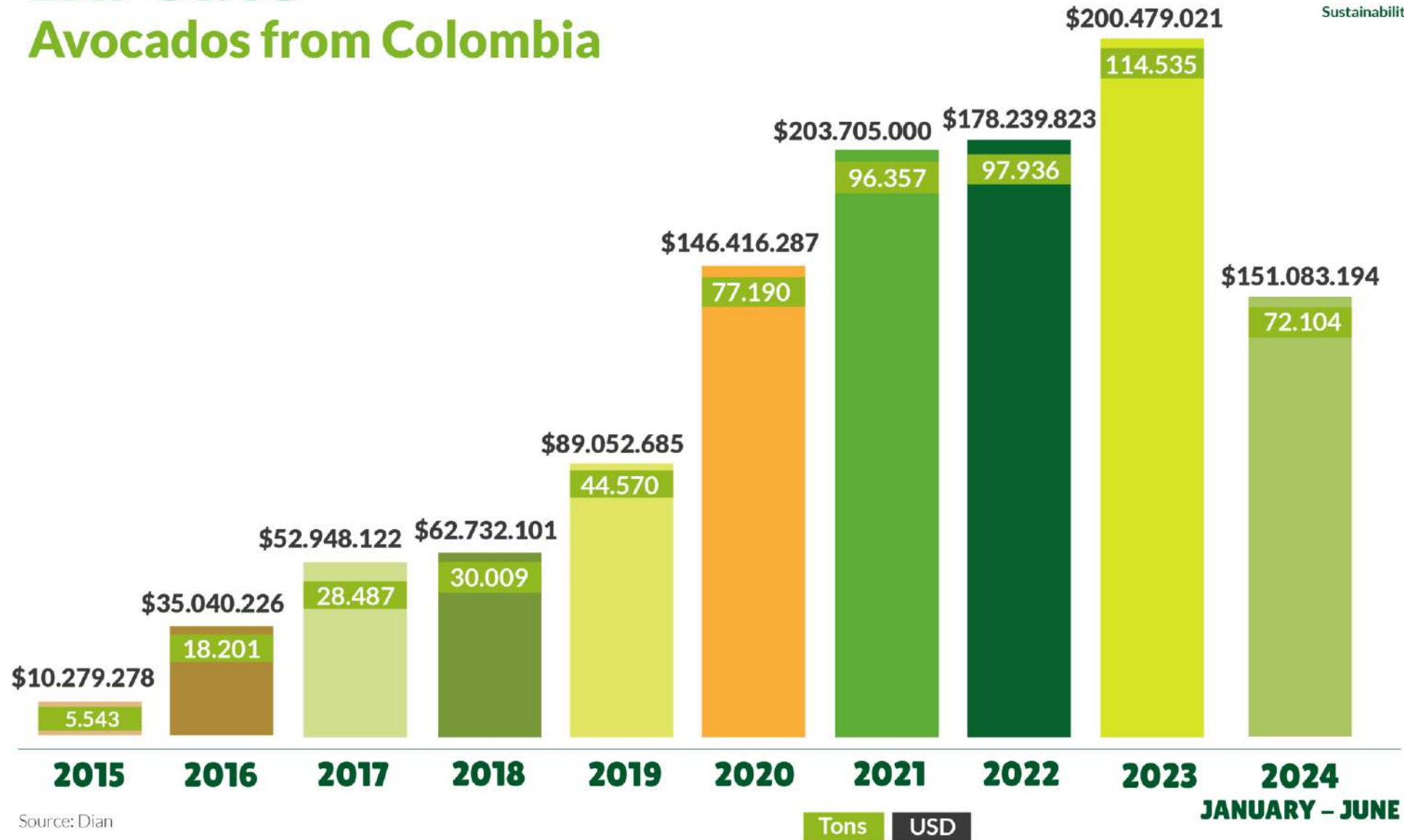


EXPORTS

Avocados from Colombia



corpohass



Source: Dian

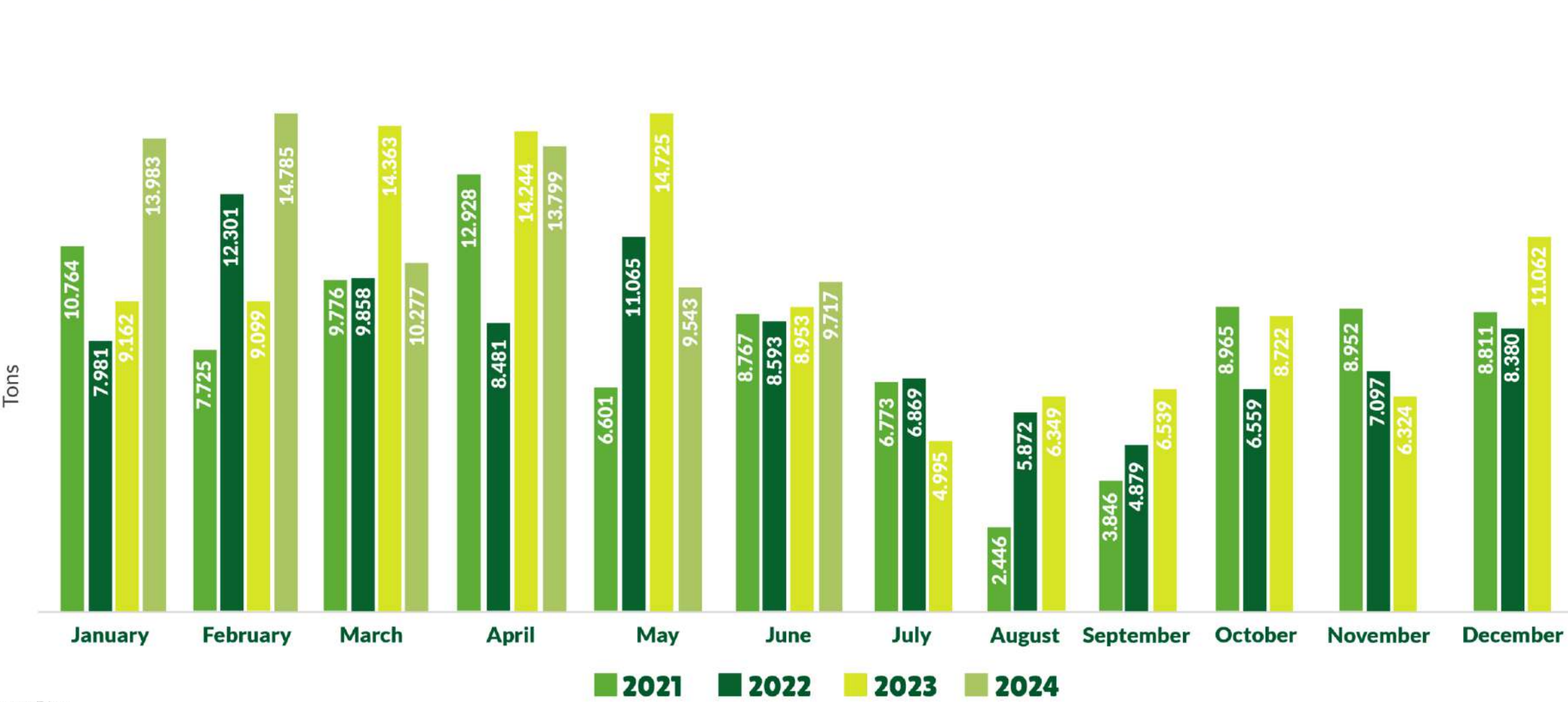
EXPORTS PER MONTH

Avocados from Colombia



Sustainability from the heart

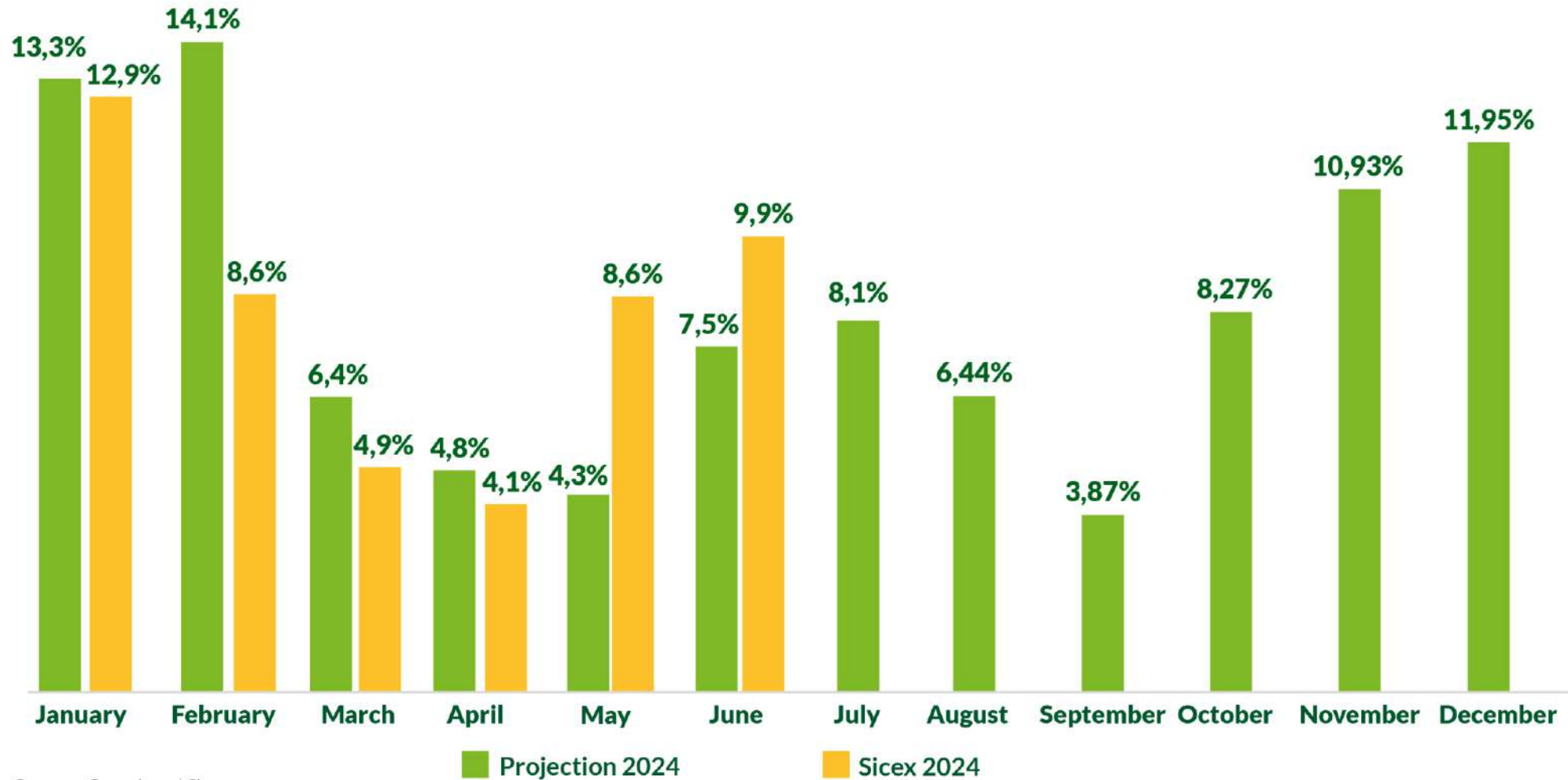
corpohass



Source: Dian

EXPORTS VS. PROJECTIONS

Avocados from Colombia



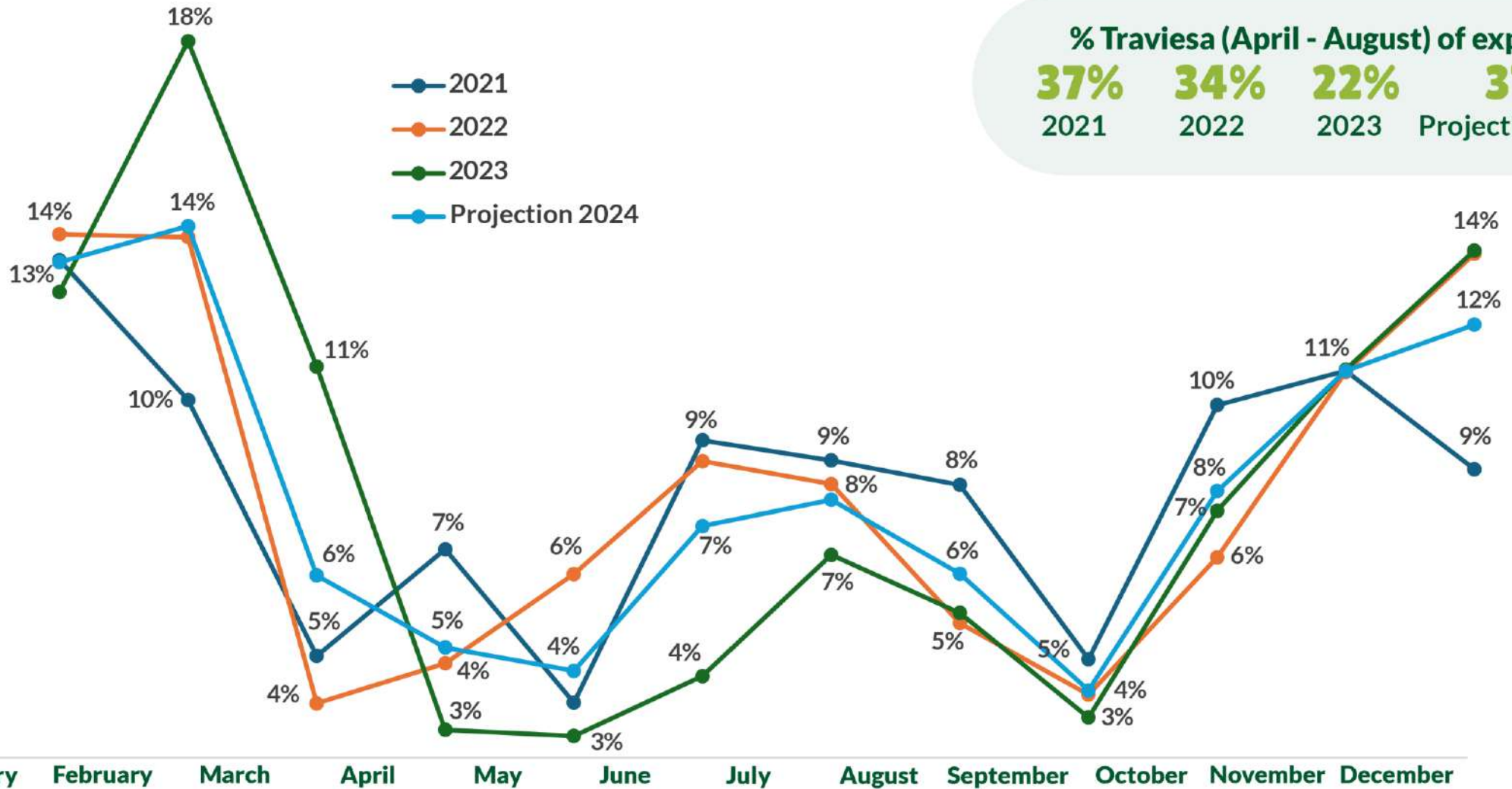
Sources: Corpohass | Sicex

EXPORTS

Avocados from Colombia



corpohass



PRODUCTION AREAS



corpohass

¿WHERE IS OUR Avocado Grown?



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

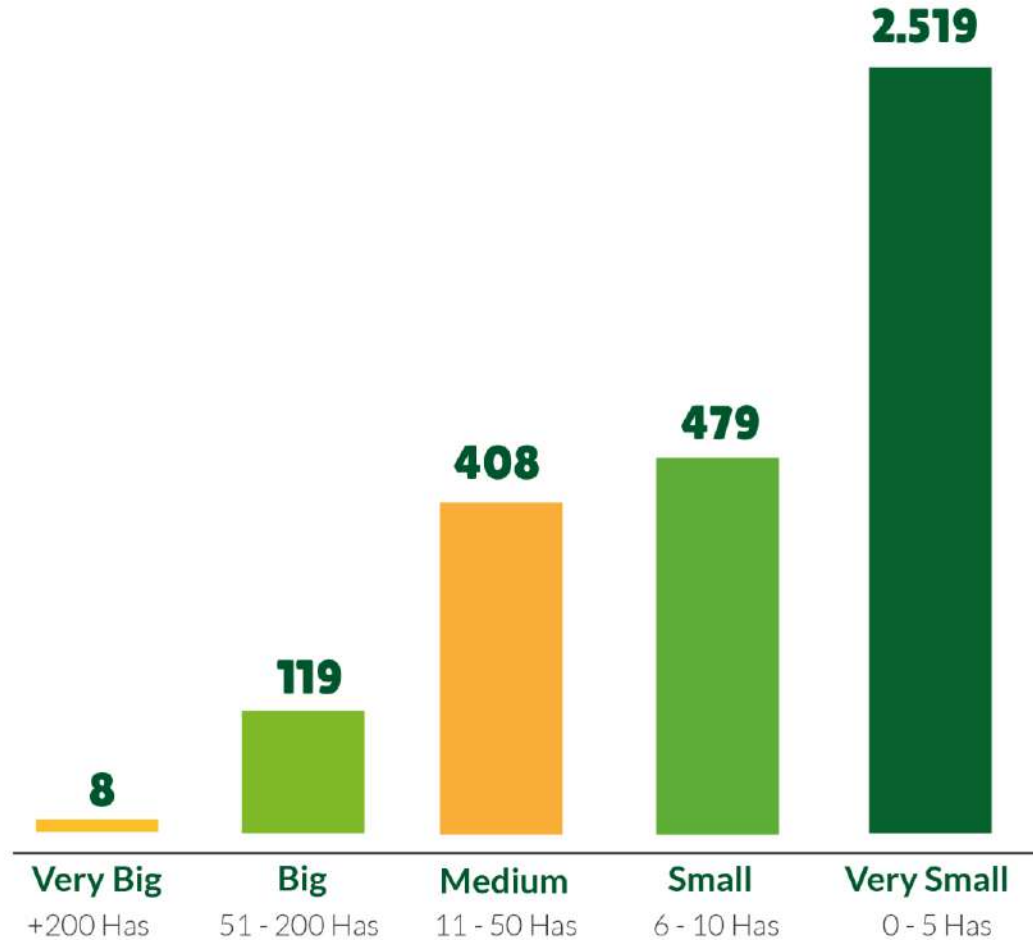
*Zomac:
Zones affected by
armed conflict.

	 Registered Farms	 Registered Hectares
■ Antioquia	1.872	12.208
■ Caldas	297	6.956,15
■ Valle del Cauca	173	4.966,21
■ Quindio	70	2.411,09
■ Risaralda	211	2.037,08
■ Tolima	313	1.669,7
■ Huila	232	926,14
■ Cauca	142	340,2
■ Cundinamarca	69	309,28
■ Narino	107	146,54
■ Putumayo	15	51,42
■ Santander	11	37,05
■ Boyaca	15	35,92
■ Caqueta	1	33
■ North of Santander	4	5,65
■ Choco	1	5
	3.533	32.132,21



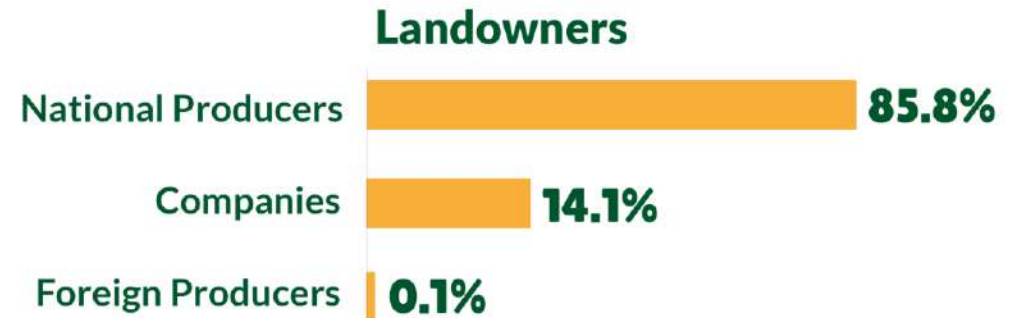
Source: ICA
*December 2023

PRODUCERS Classification



By Land Size

	Has	%
Very Small	4.848	15,09%
Small	3.668	11,42%
Medium	9.615	29,92%
Big	11.625	36,18%
Very Big	2.377	7,40%



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.

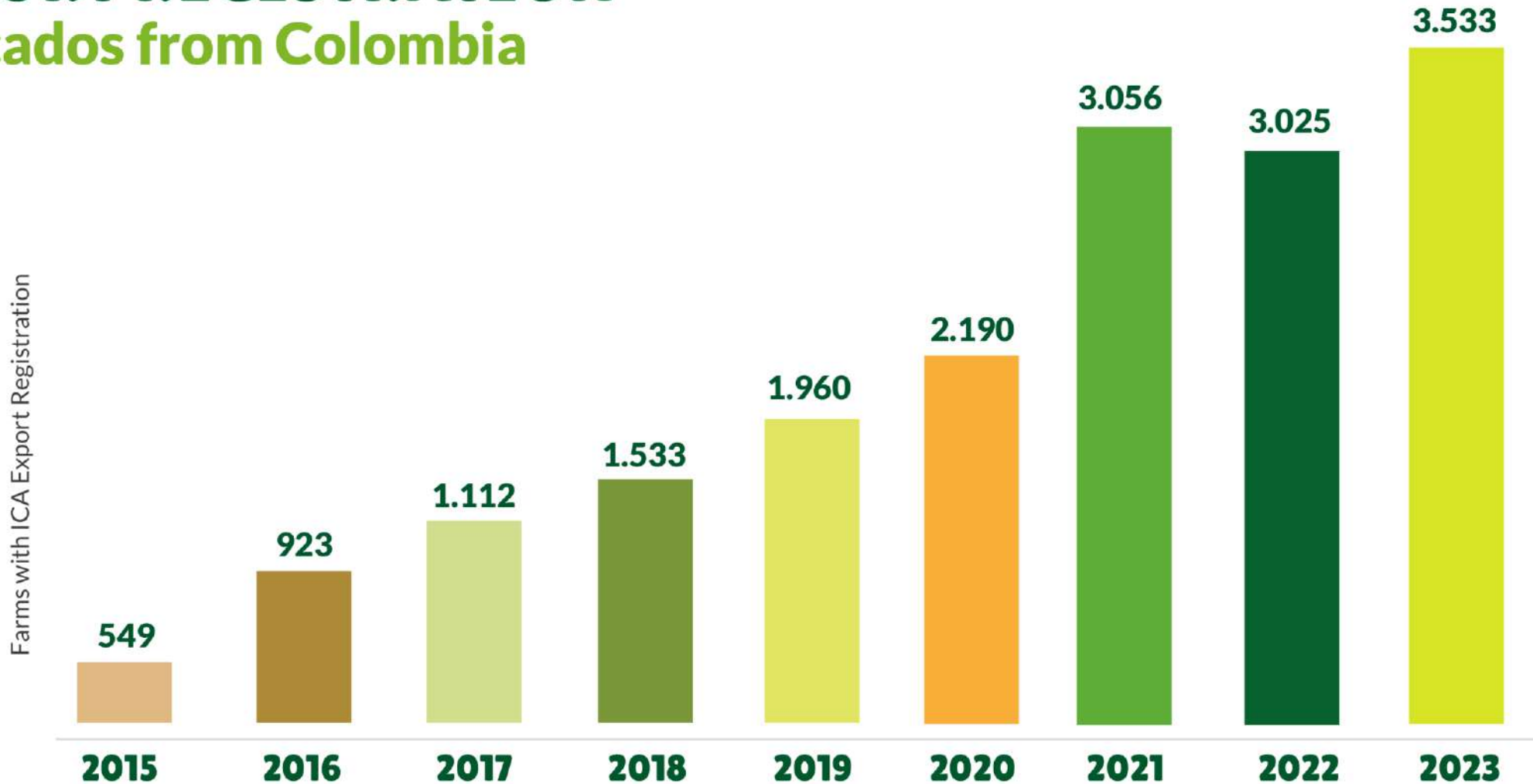
*More info: corpohass.com

FARMS WITH ICA EXPORT REGISTRATION

Avocados from Colombia



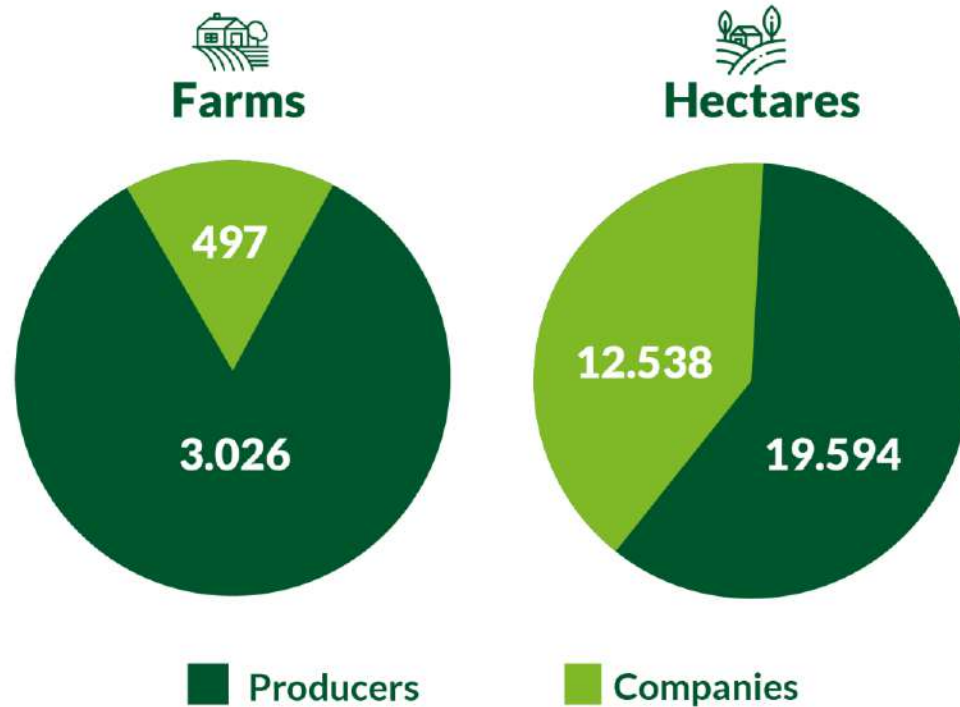
corpohass



Source: ICA

AREA WITH EXPORT FARM REGISTRATION

By Producer



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

Source: ICA

MARKETS



corpohass

PWP OPERATIONAL WORK PLAN

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

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

AREA APPROVED FOR SPECIAL MARKETS

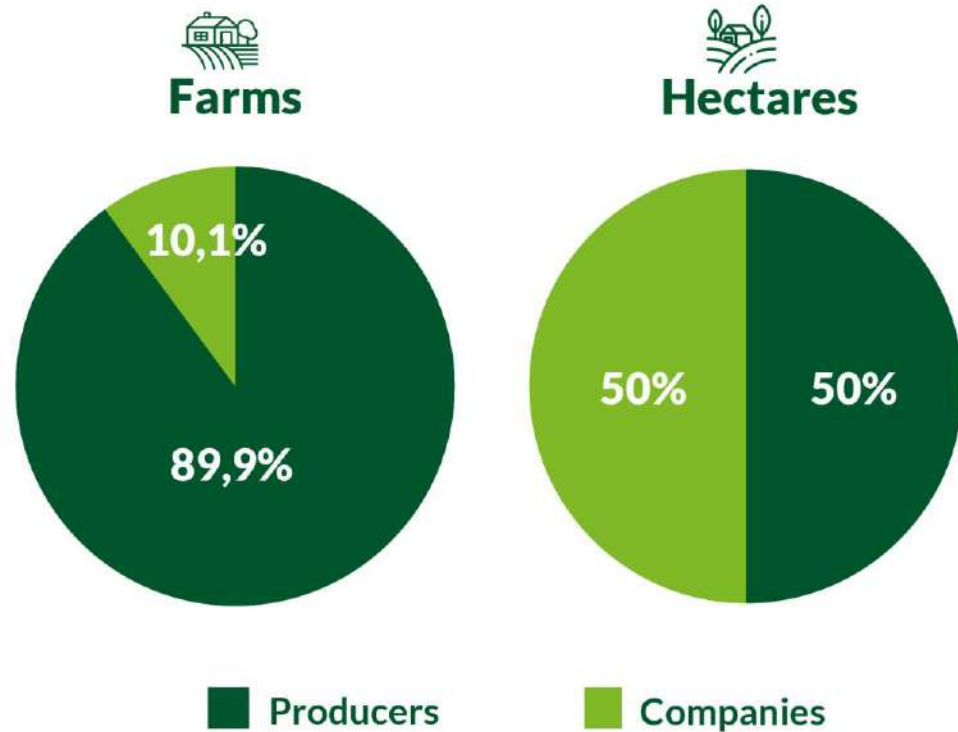
With PWP

	 Farms	 Hectares
 USA	401	9.752,64
 Argentina	247	6.757,39
 Japan	114	4.356,79
 Peru	118	5.530,33
 South Korea	38	1.111,21
 China	24	588,55
 Chile	16	1.024,16

Source: ICA
* June 2024

POTENTIAL AREA FOR PWP

By Producer



Source: ICA

AVERAGE AREA

3,61 hectares	32,24 hectares
Producers	Companies



USA PWP

Corpohass was crucial in establishing the Operational Work Plan (PWP) 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 PWP.

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



corpohass

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 PWP

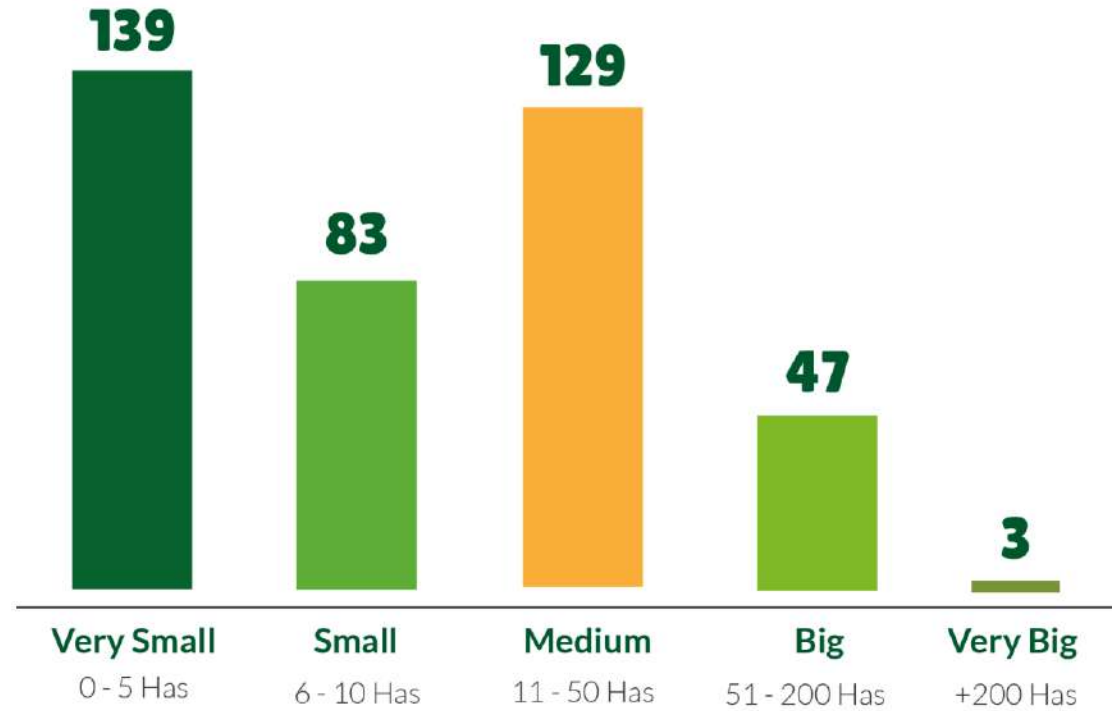
	 Farms	 Hectares
Antioquia	303	5.005,13
Caldas	50	3.067,63
Quindio	11	712,88
Valle del Cauca	7	405,4
Risaralda	10	297,85
Huila	9	104,97
Tolima	7	84,88
Cundinamarca	1	48,9
Cauca	3	25
	401	9.752,64

Source: ICA
*June 2024



PRODUCERS WITH USA PWP Classification

401
Producers



Source: Corpohass

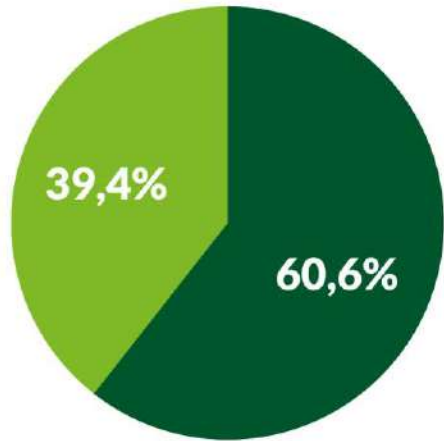


AREA WITH USA PWP

By Producers



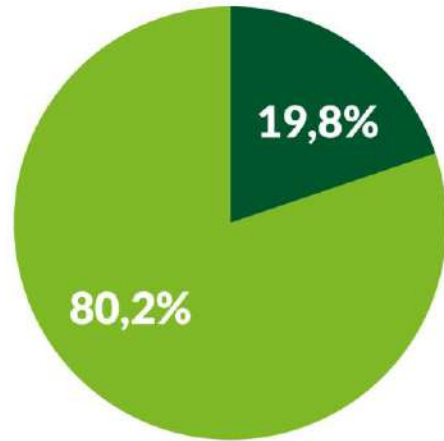
Farms



■ Producers



Hectares



■ Companies

Source: ICA

AVERAGE AREA

7,96 hectares
Producers

49,48 hectares
Companies

9.752,64
Hectares

401
Farms

22.379,57
Potential Area for
USA PWP



corpohass



CHILE PWP

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 PWP](#)



FARMS WITH CHILE PWP

	 Farms	 Hectares
Caldas	13	809,96
Risaralda	1	161
Antioquia	2	53,2
	16	1.024,16

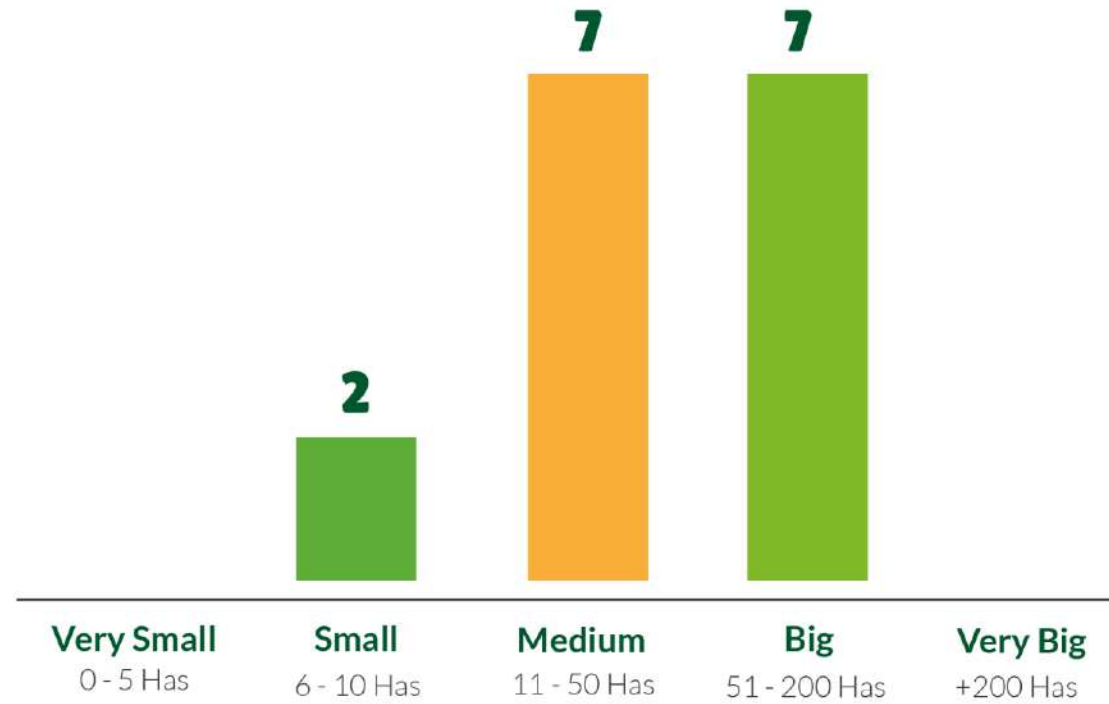
Source: ICA
*June 2024



PRODUCERS WITH CHILE PWP

Classification

16
Producers



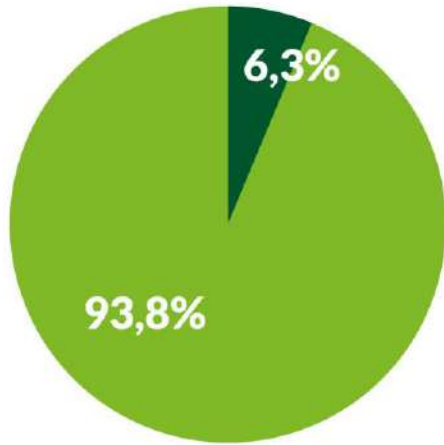
Source: Corpohass



AREA WITH CHILE PWP

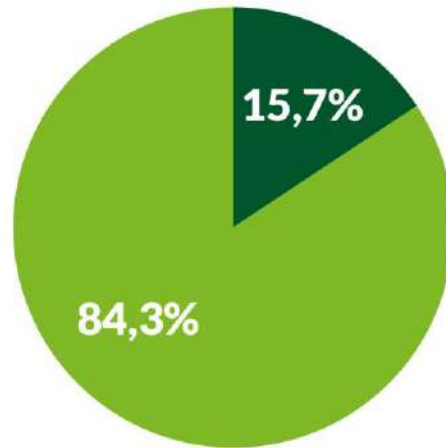
By Producers


Farms



 Producers


Hectares



 Companies

Source: ICA

AVERAGE AREA

161 hectares
Producers

57,58 hectares
Companies

16
Farms

1.024,16
Hectares

31.108,05
Potencial Area for Chile PWP



corpohass



corpohass

ARGENTINA PWP

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 PWP](#)



FARMS WITH ARGENTINA PWP

	 Farms	 Hectares
Antioquia	202	3.800,1
Caldas	22	1.673,7
Quindio	9	712,5
Risaralda	6	427,8
Tolima	4	87,07
Huila	3	31,22
Valle del Cauca	1	25
	247	6.757,39

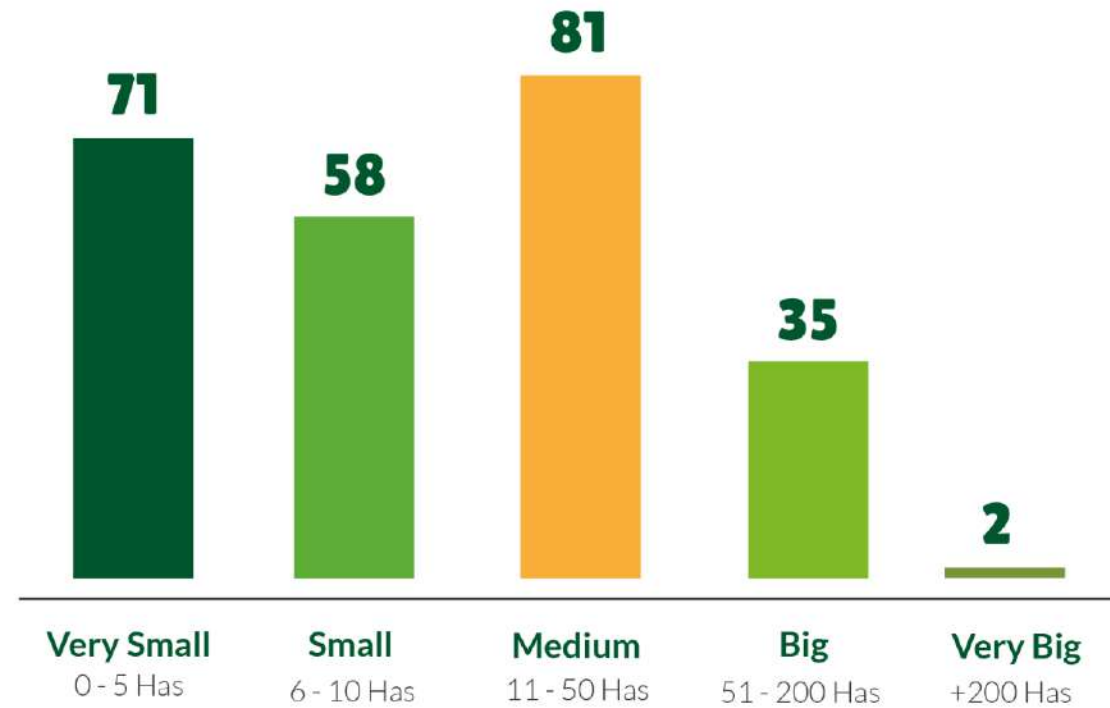
Source: ICA
*June 2024



PRODUCERS WITH ARGENTINA PWP

Classification

247
Producers

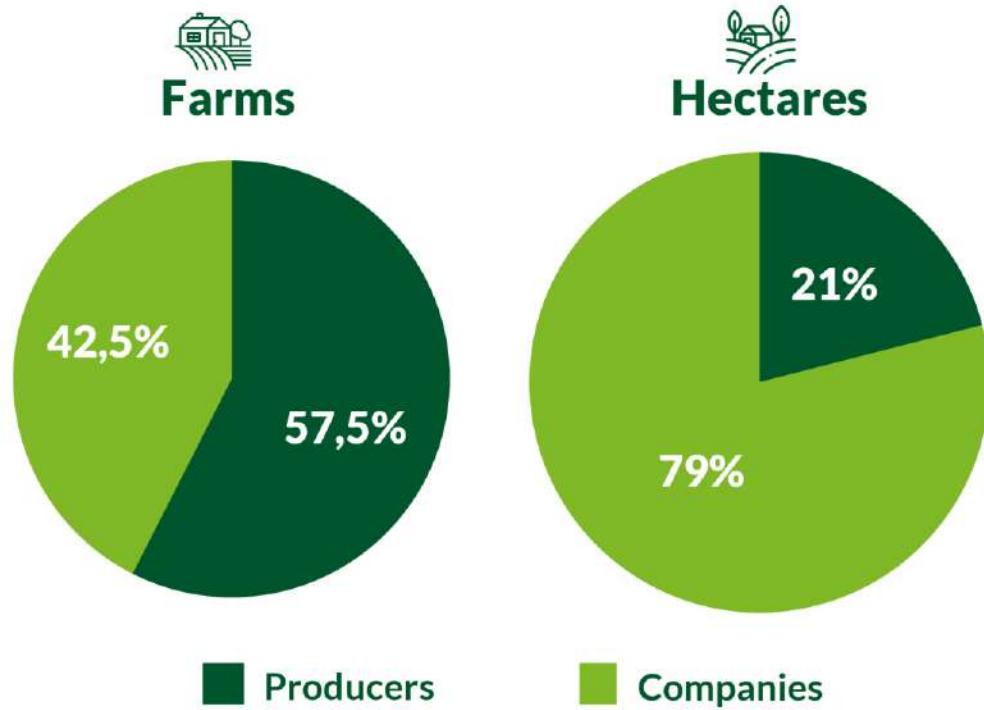


Source: Corpohass



AREA WITH ARGENTINA PWP

By Producers



Source: ICA

AVERAGE AREA
9,99 hectares Producers
50,84 hectares Companies

247 Farms
6.757,39 Hectares

25.374,82
Potencial Area for Argentina PWP



PERU PWP

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 PWP](#)



FARMS WITH PERU PWP

	 Farms	 Hectares
Antioquia	95	2.888,27
Caldas	14	1.203,78
Quindio	3	601,04
Valle del Cauca	3	600,99
Risaralda	1	130
Tolima	1	73
Huila	1	33,25
	118	5.530,33

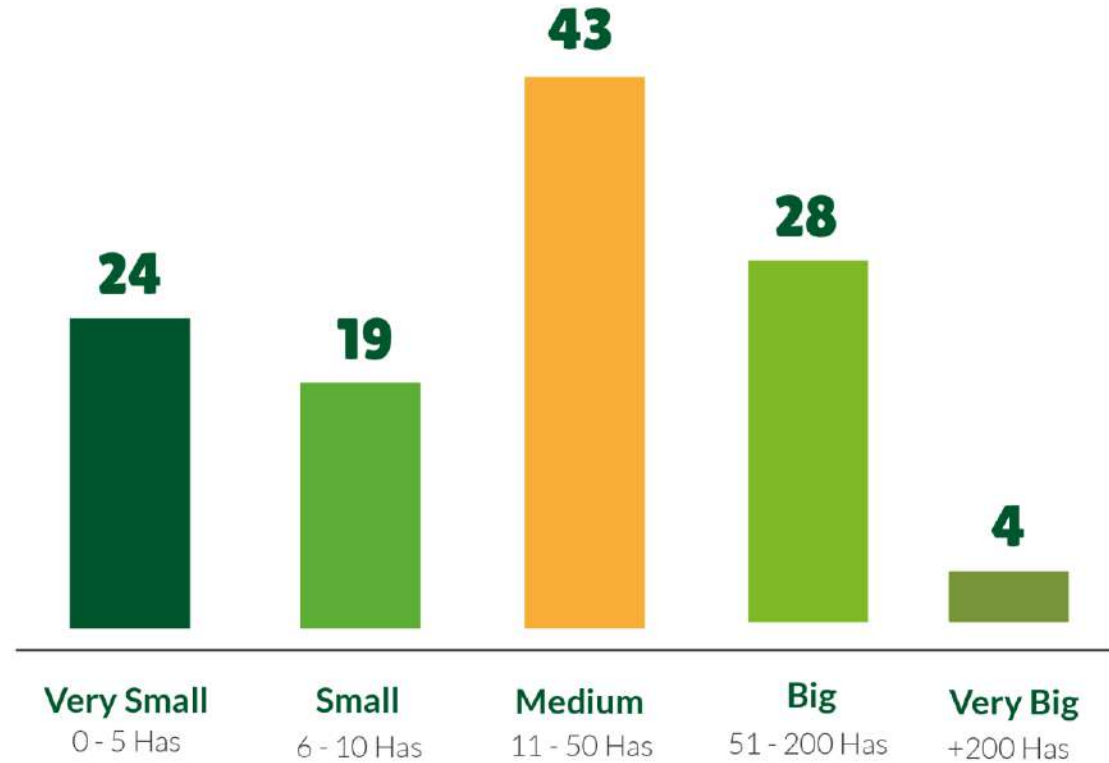
Source: ICA
*June 2024



PRODUCERS WITH PERU PWP

Classification

118
Producers

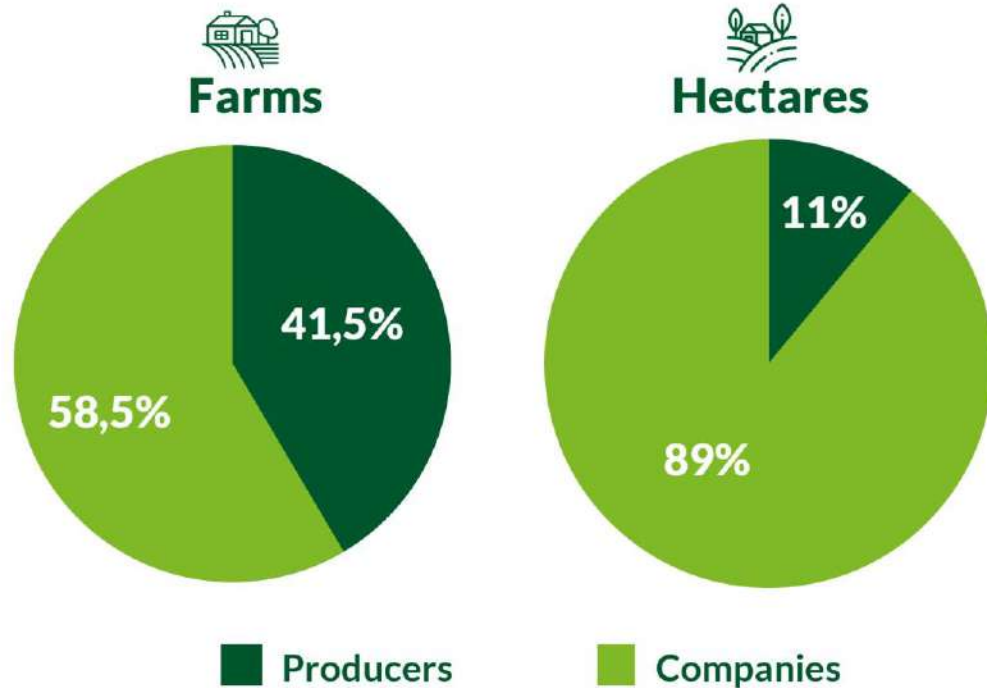


Source: Corpohass



AREA WITH PERU PWP

By Producer



Source: ICA

AVERAGE AREA

12,39 hectares
Producers

71,35 hectares
Companies

118
Farms

5.530,33
Hectares

26.601,88
Potencial Area for Peru PWP



corpohass



CHINA PWP

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 PWP](#)



FARMS WITH CHINA PWP

	 Farms	 Hectares
Antioquia	22	511,3
Valle del Cauca	1	44
Huila	1	33,25
	24	588,55

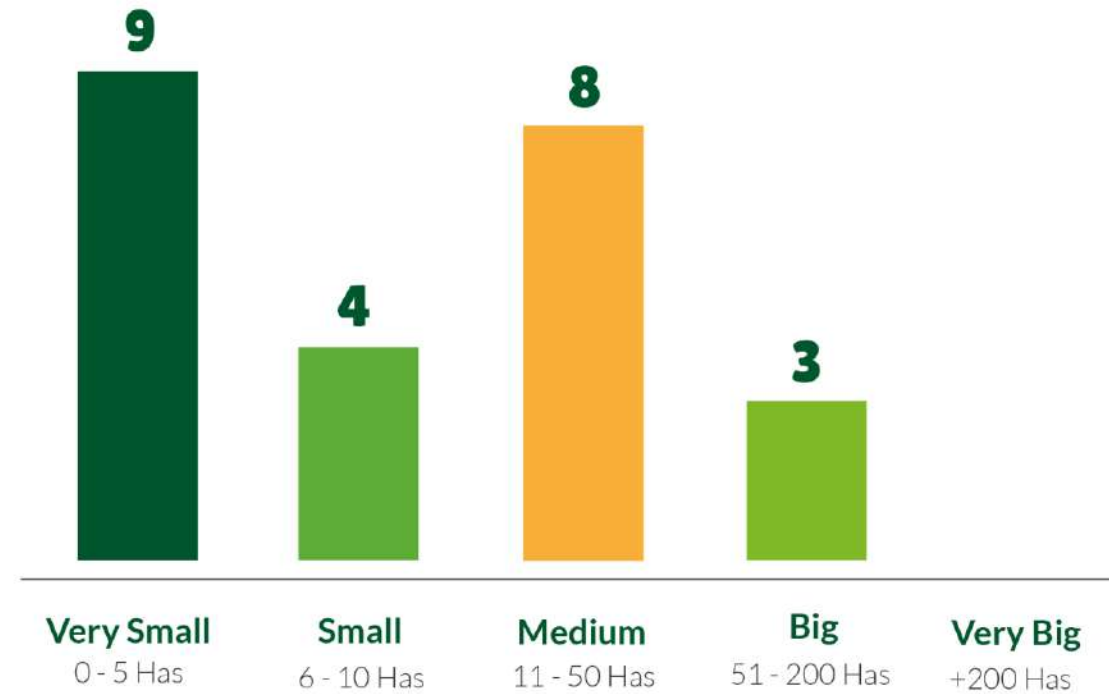
Source: ICA
*June 2024



PRODUCERS WITH CHINA PWP

Classification

24
Producers

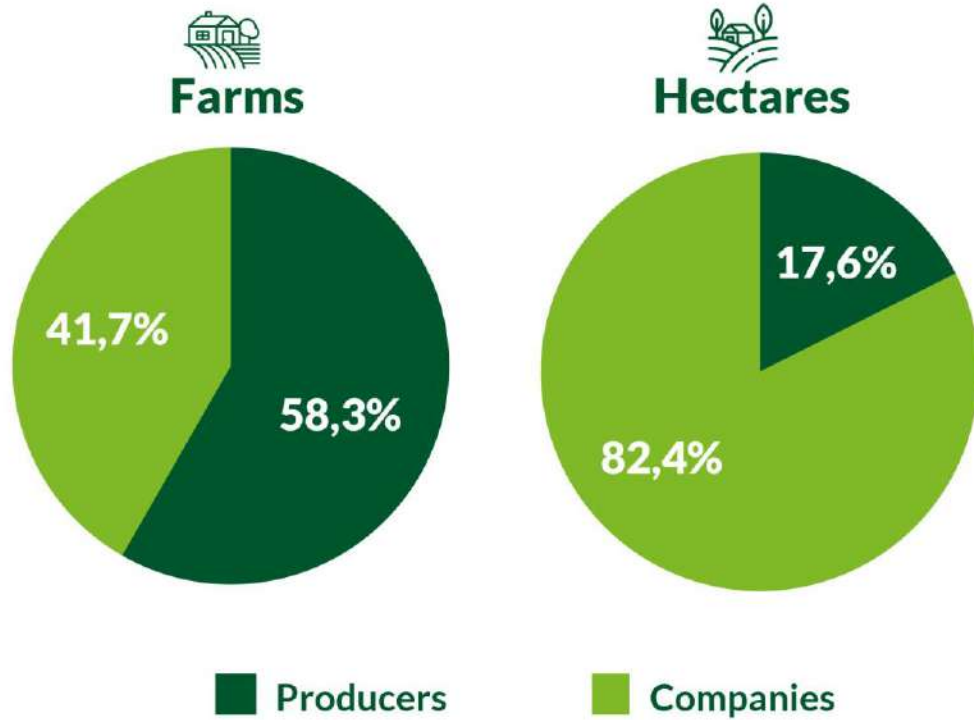


Source: Corpohass



AREA WITH CHINA PWP

By Producer



Source: ICA

AVERAGE AREA
7,41 hectares Producers
48,48 hectares Companies

24 Farms
588,55 Hectares

31.543,66
Potencial Area for China PWP



corpohass



JAPAN PWP

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 PWP](#)



FARMS WITH JAPAN PWP

	 Farms	 Hectares
Antioquia	981	1.787,79
Caldas	13	812,29
Quindio	6	674,6
Valle del Cauca	6	673,24
Risaralda	4	344,4
Huila	4	64,47
	114	4.356,79

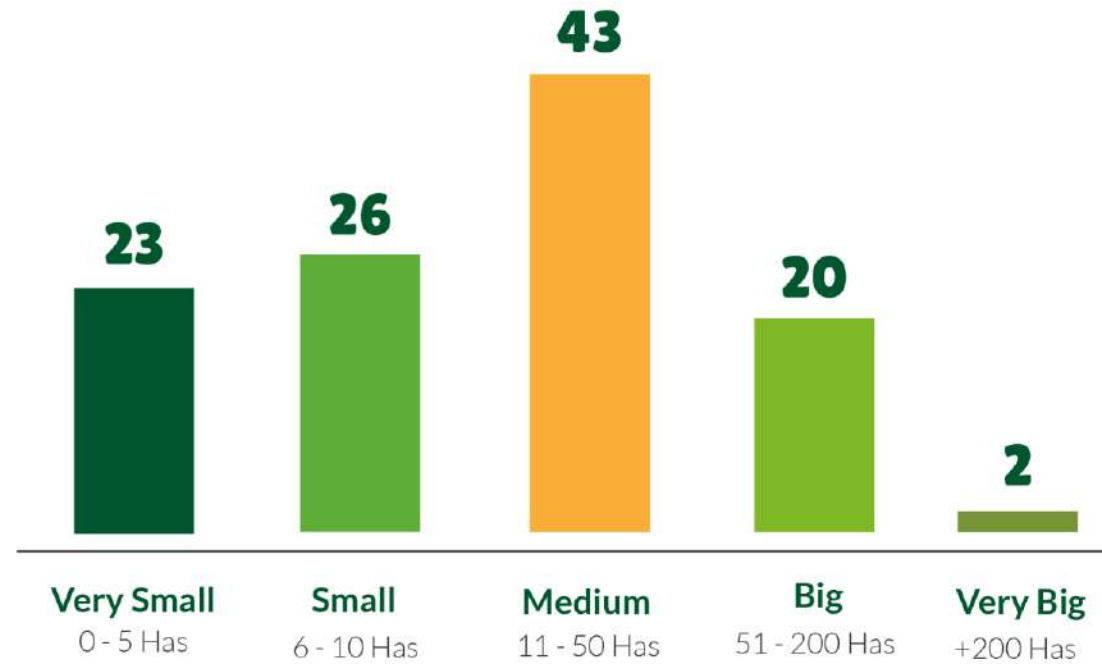
Source: ICA
*June 2024



PRODUCERS WITH JAPAN PWP

Classification

114
Producers

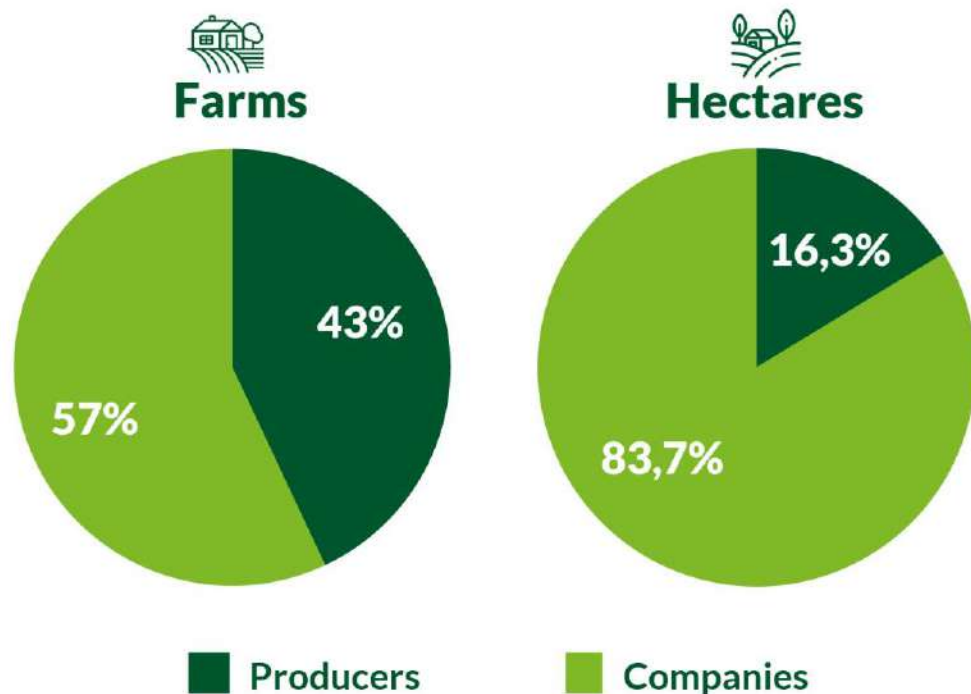


Source: Corpohass



AREA WITH JAPAN PWP

By Producer



Source: ICA

AVERAGE AREA
14,53 hectares Producers
56,08 hectares Companies

114 Farms
4.356,79 Hectares

27.775,42
Potencial Area for Japan PWP



corpohass



SOUTH KOREA PWP

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 PWP](#)



FARMS WITH SOUTH KOREA PWP

	 Farms	 Hectares
Antioquia	35	780,71
Risaralda	2	291
Valle del Cauca	1	39,5
	38	1.111,21

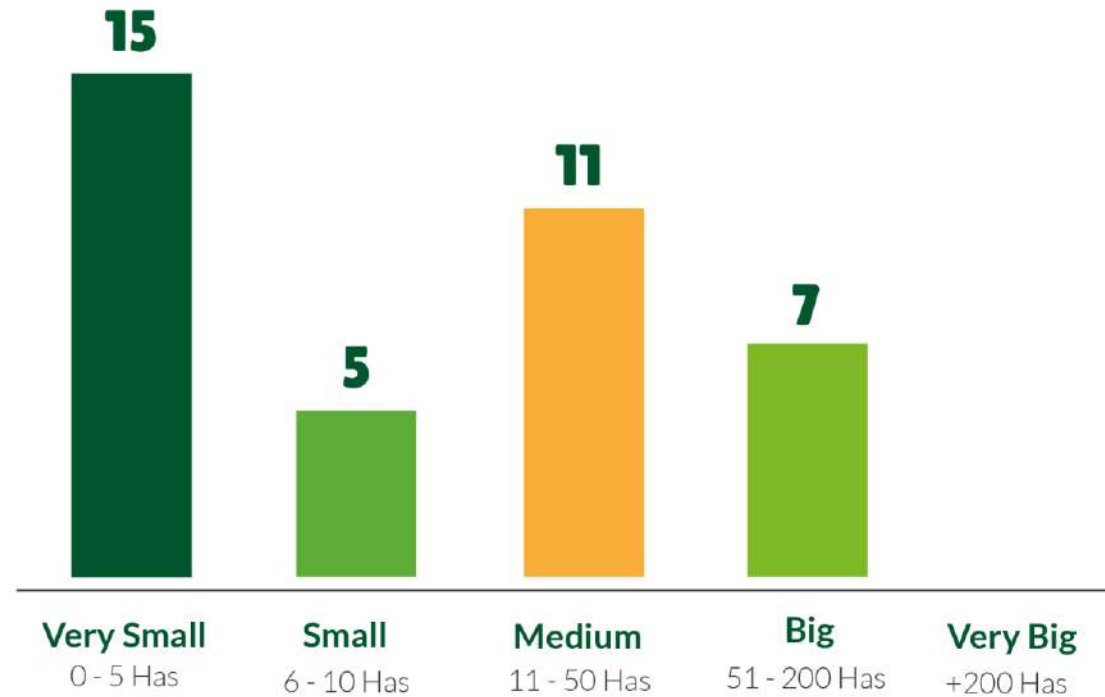
Source: ICA
*June 2024



PRODUCERS WITH SOUTH KOREA PWP

Classification

38
Producers

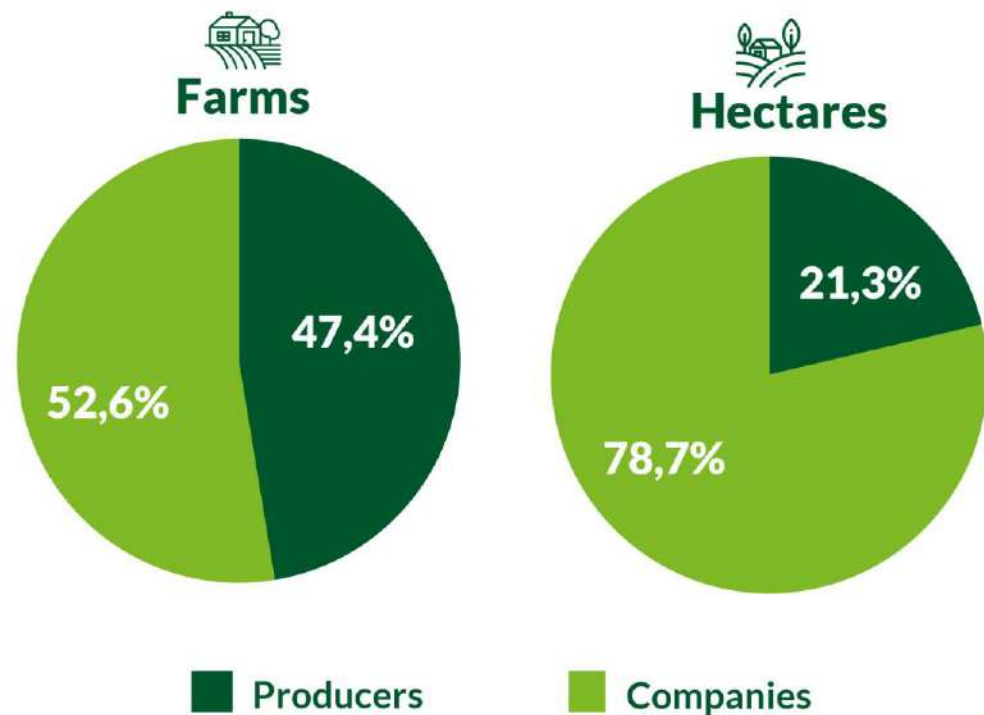


Source: Corpohass



AREA WITH SOUTH KOREA PWP

By Producer



Source: ICA

AVERAGE AREA

11,83 hectares Producers	48,59 hectares Companies
------------------------------------	------------------------------------

38
Farms

1.111,21
Hectares

31.021
Potencial Area for South Korea PWP

EXPORTS



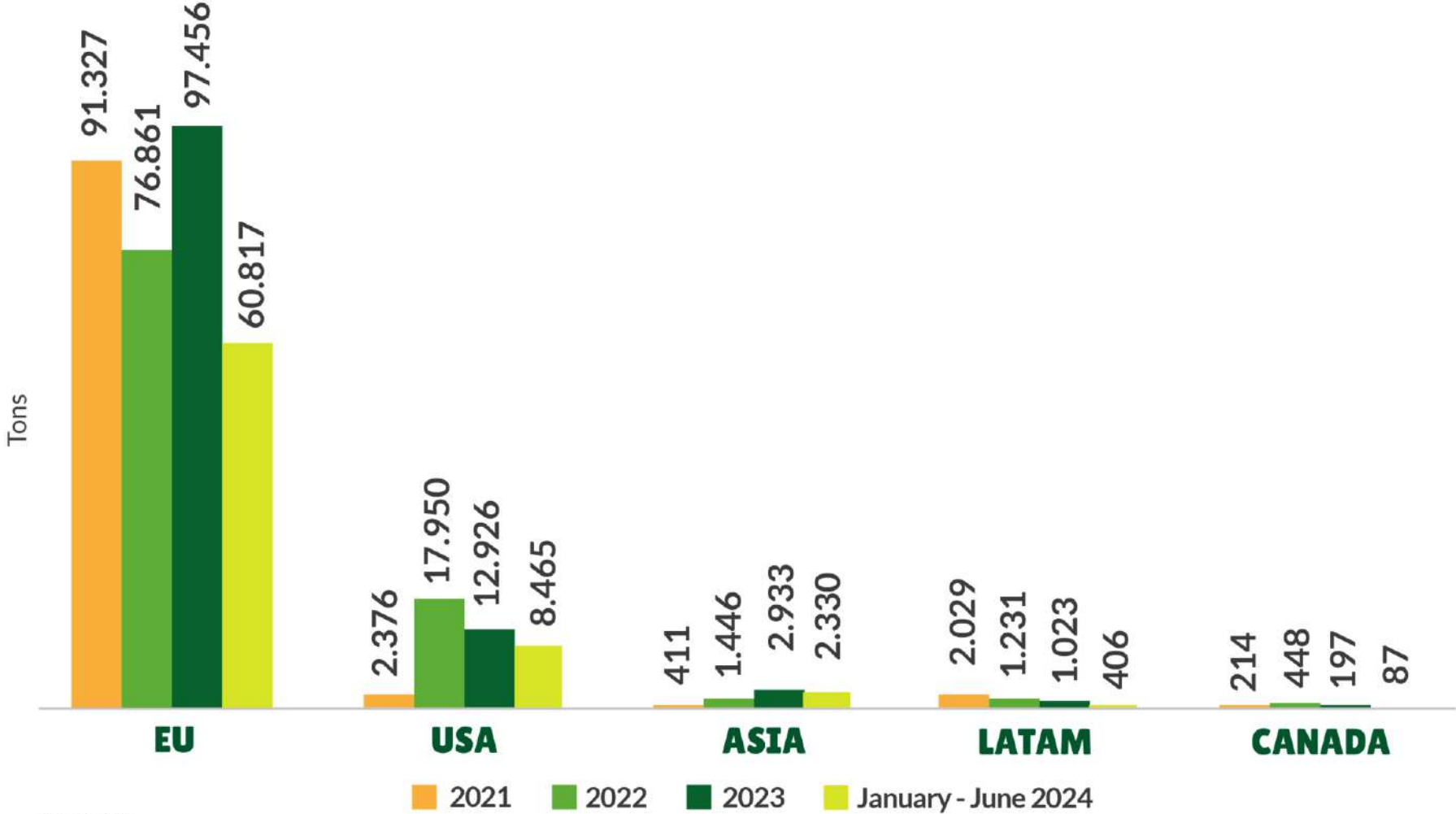
corpohass

EXPORT DESTINATIONS

Avocados from Colombia



corpohass



Source: Dian

Main Markets

EU | EUROPEAN UNION



Sustainability from the heart

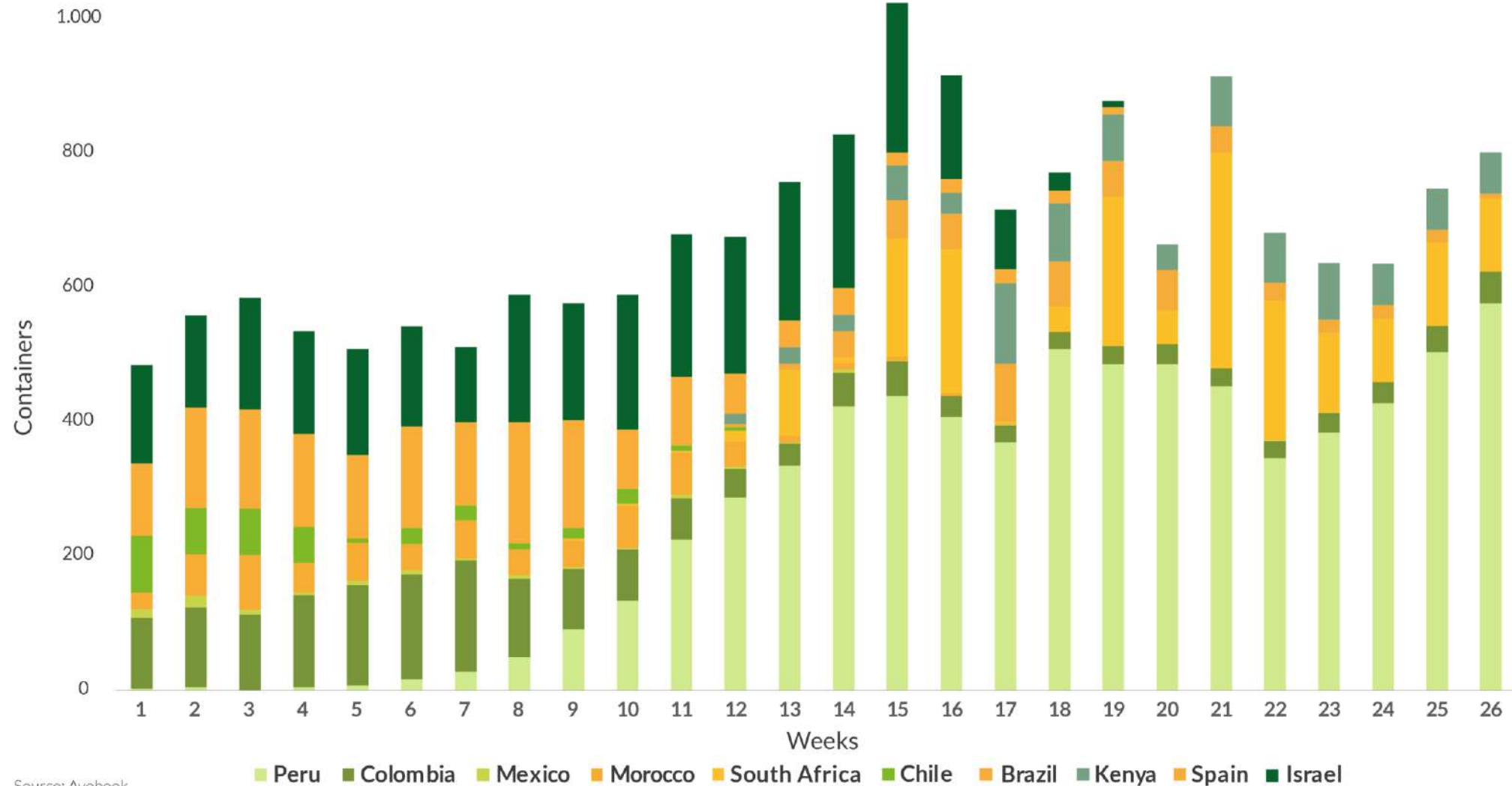
corpohass

EU SUPPLIERS

January - June 2024



corpohass



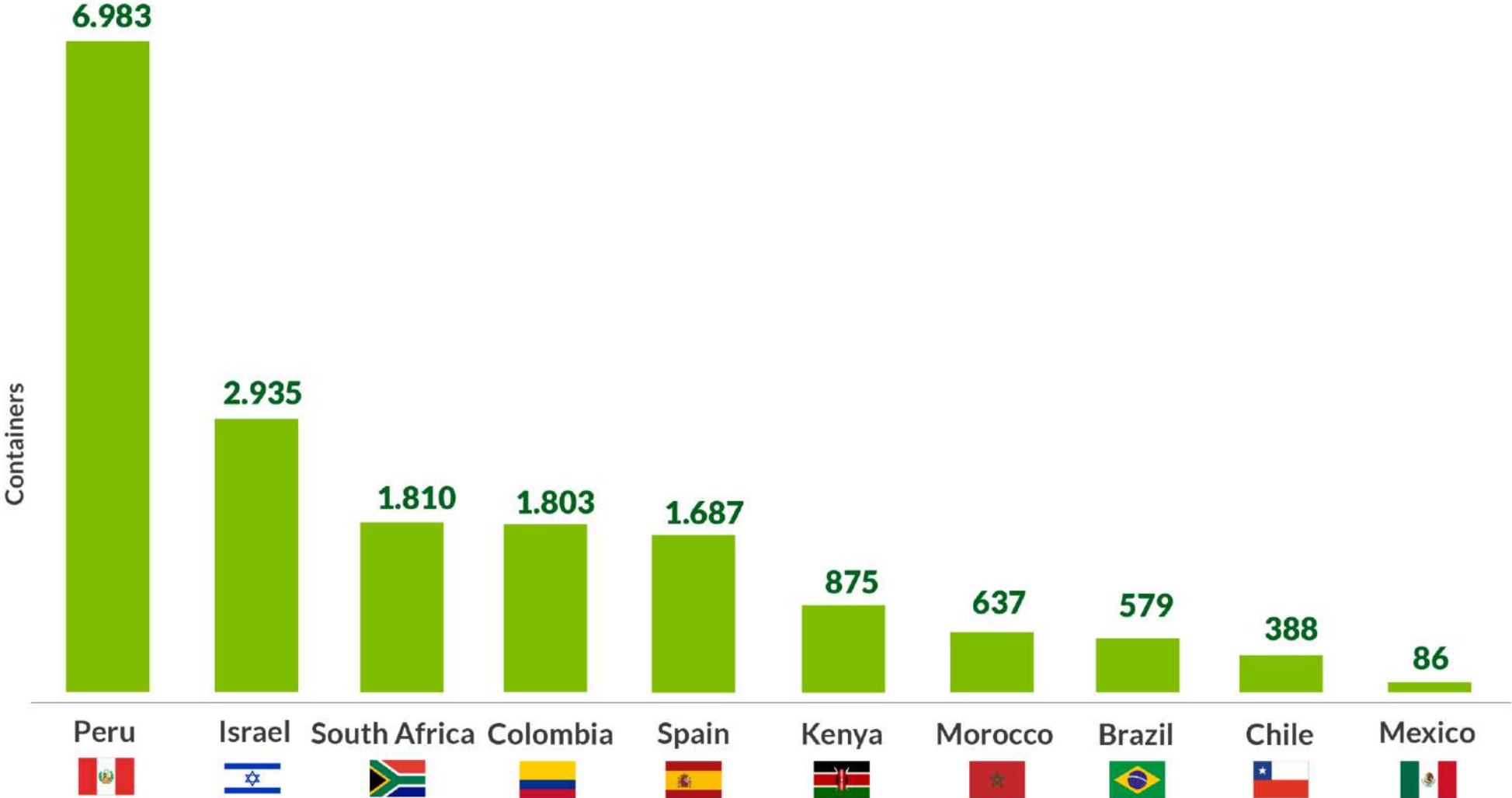
Source: Avobook

EU SUPPLIERS

2024






corpohass



Source: Avobook

EXPORTS TO EUROPEAN COUNTRIES

Tons

	2021	2022	Tons 2023	JANUARY – JUNE 2024
 Netherlands	50.086	46.764	53.472	35.610
 Spain	11.807	9.236	13.996	5.665
 UK	11.521	10.727	12.459	6.971
 Belgium	5.893	3.264	5.579	7.338
 Germany	3.646	2.724	5.407	2.369
 France	5.462	2.239	5.257	1.973
Otros	2.914	1.907	1.286	891
	91.329	76.861	97.456	60.817

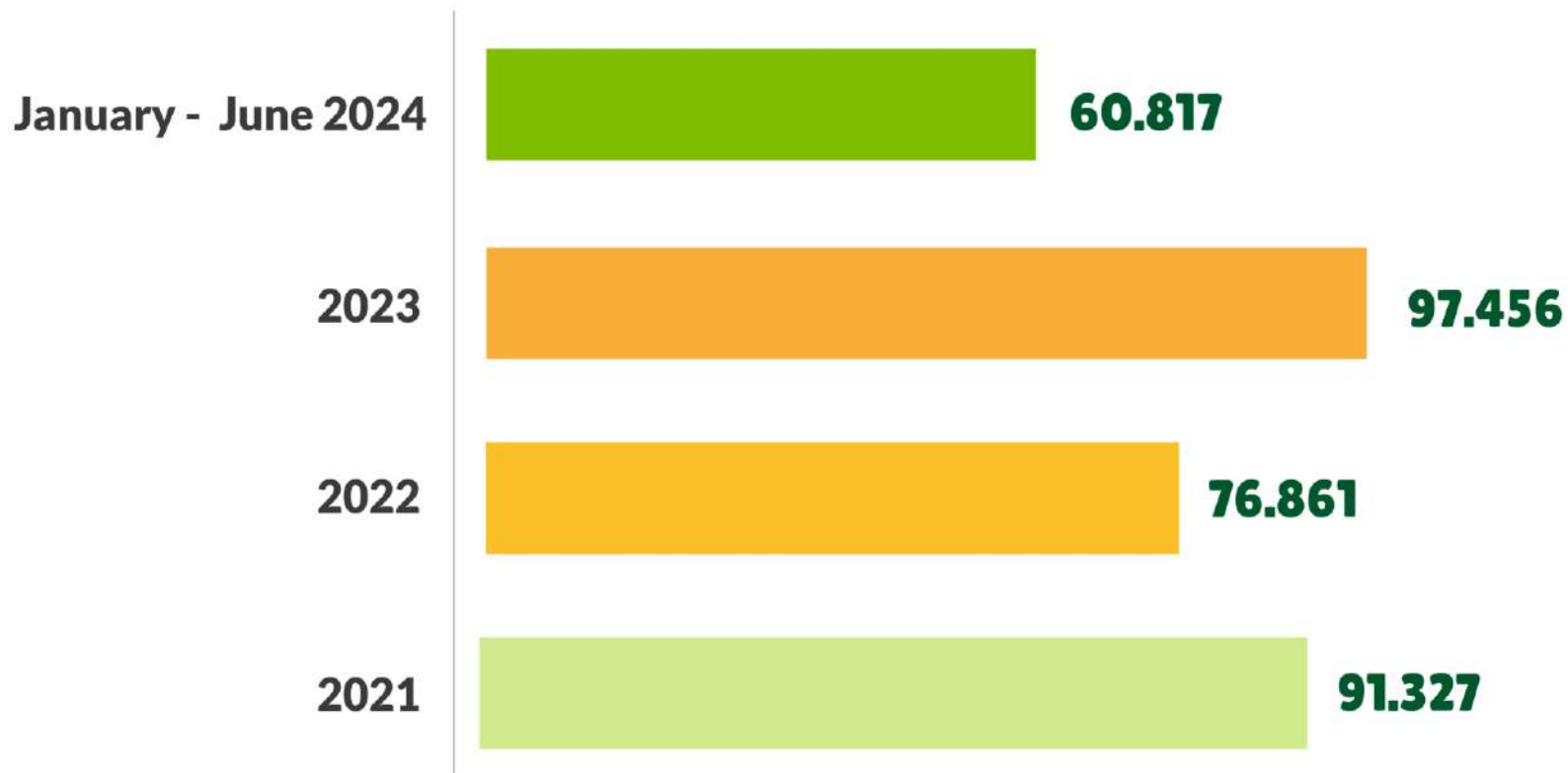
Source: Dían

EXPORTS TO EU

Tons



corpohass

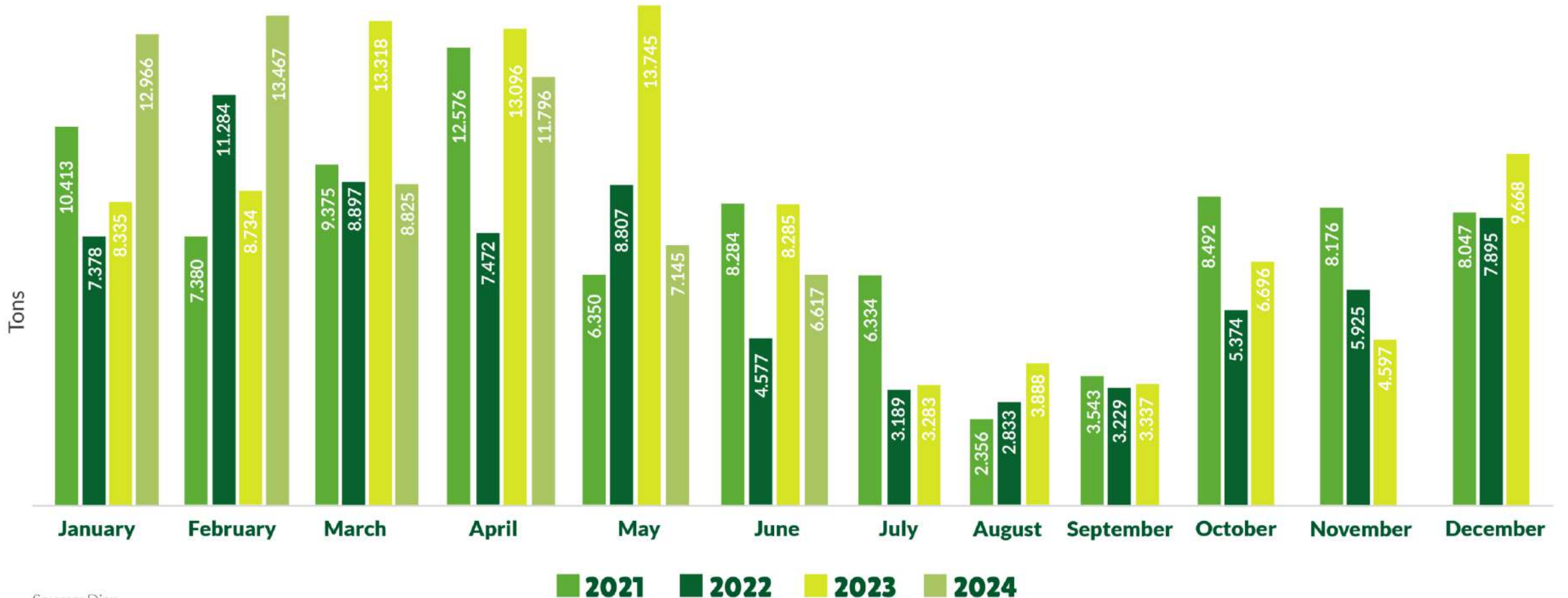


Source: Dian

Tons

EXPORTS TO EU

Tons | Month



Source: Dian

Main Markets

USA



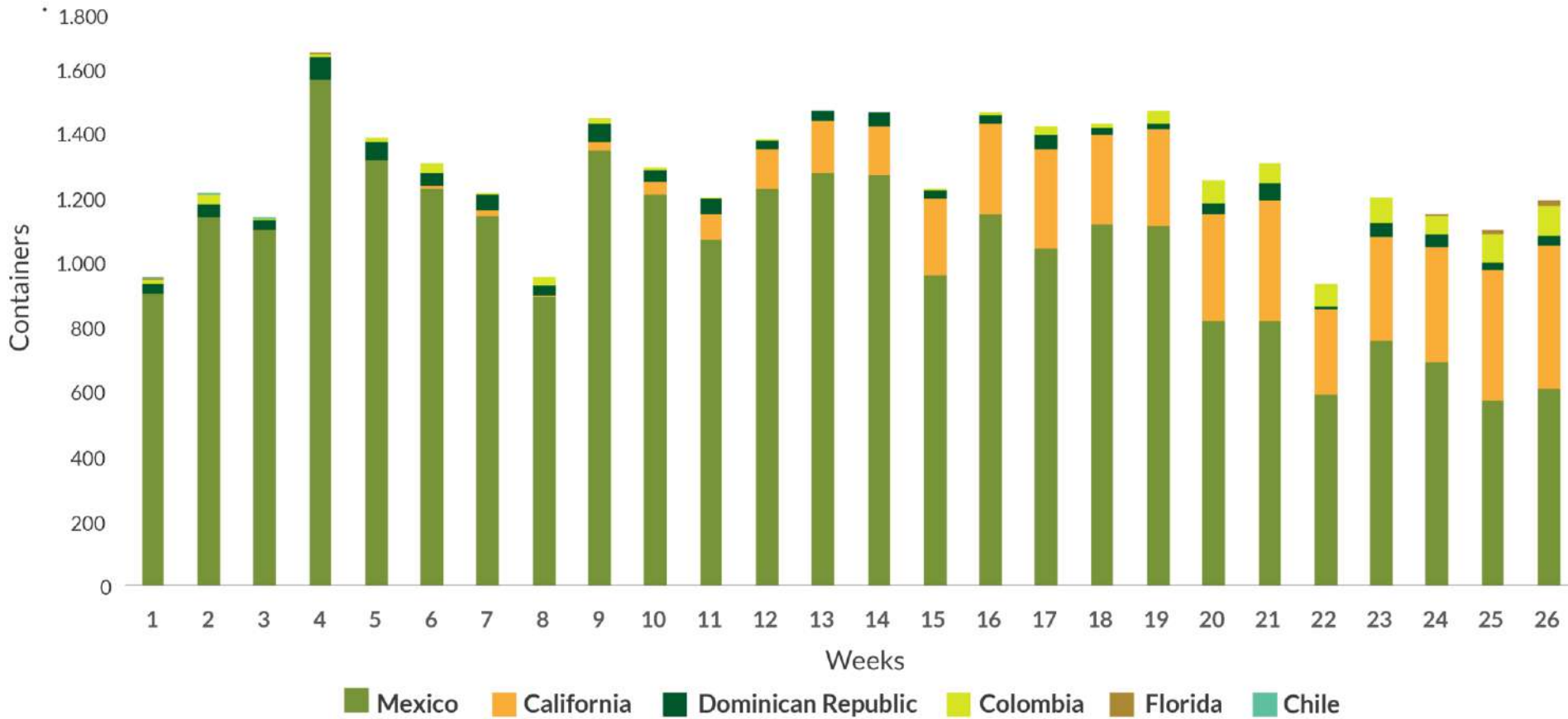
corpohass

USA SUPPLIERS

January - June 2024



corpohass



Source: USDA

USA SUPPLIERS

2024



Source: USDA

EXPORTS TO USA

Tons

January - June 2024

8.465

2023

12.926

2022

17.950

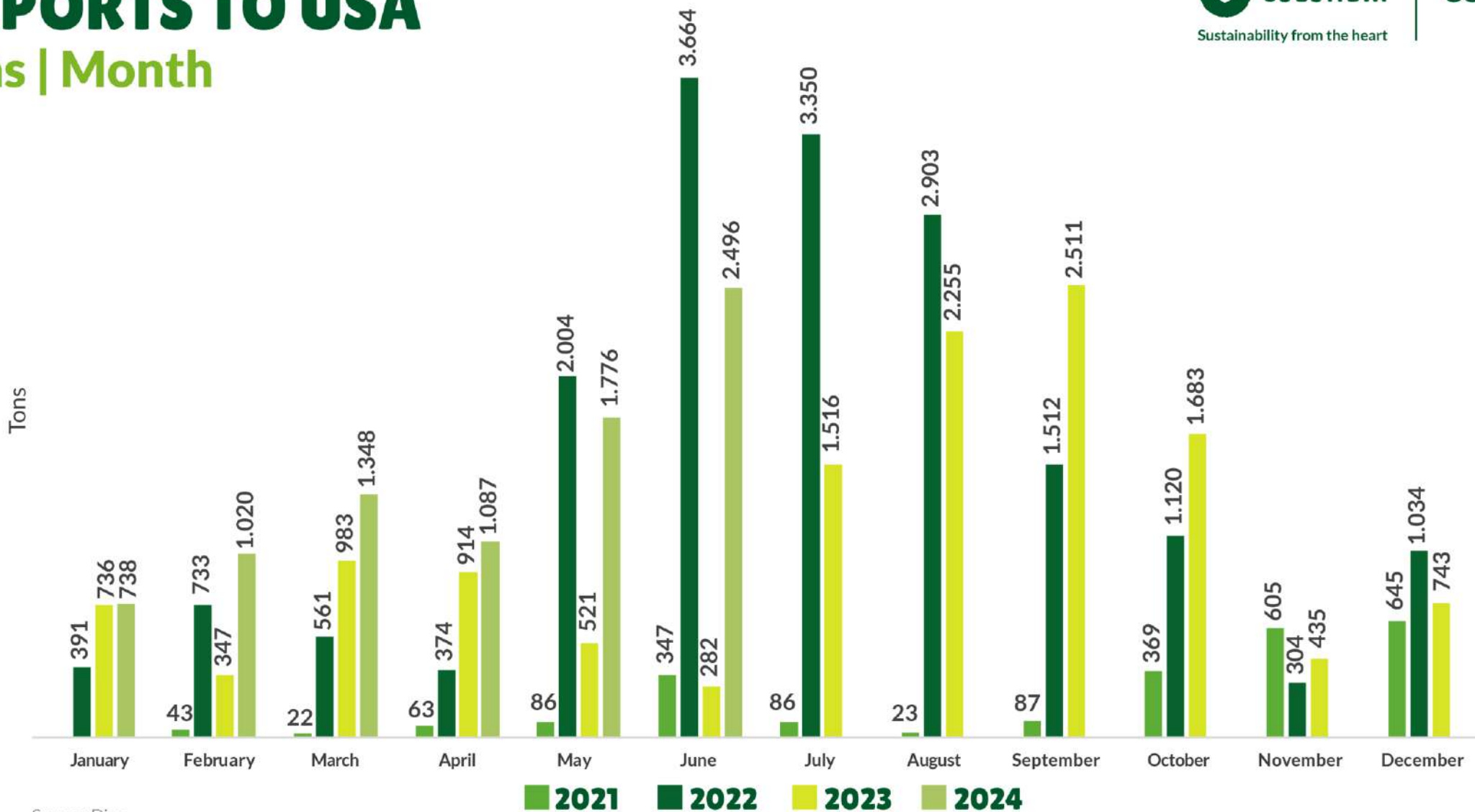
2021

2.376

Tons

EXPORTS TO USA

Tons | Month



Source: Dian

USA PORTS

Avocados from Colombia



corpohass

	% Reception
Philadelphia	66,5%
Port Everglades	17,1%
Miami	13,7%
Los Angeles	1,6%
Others	1,1%

Sources: USDA | Sicex
*January - June 2024

Main Markets

ASIA




corpohass

EXPORTS TO ASIAN COUNTRIES

Tons



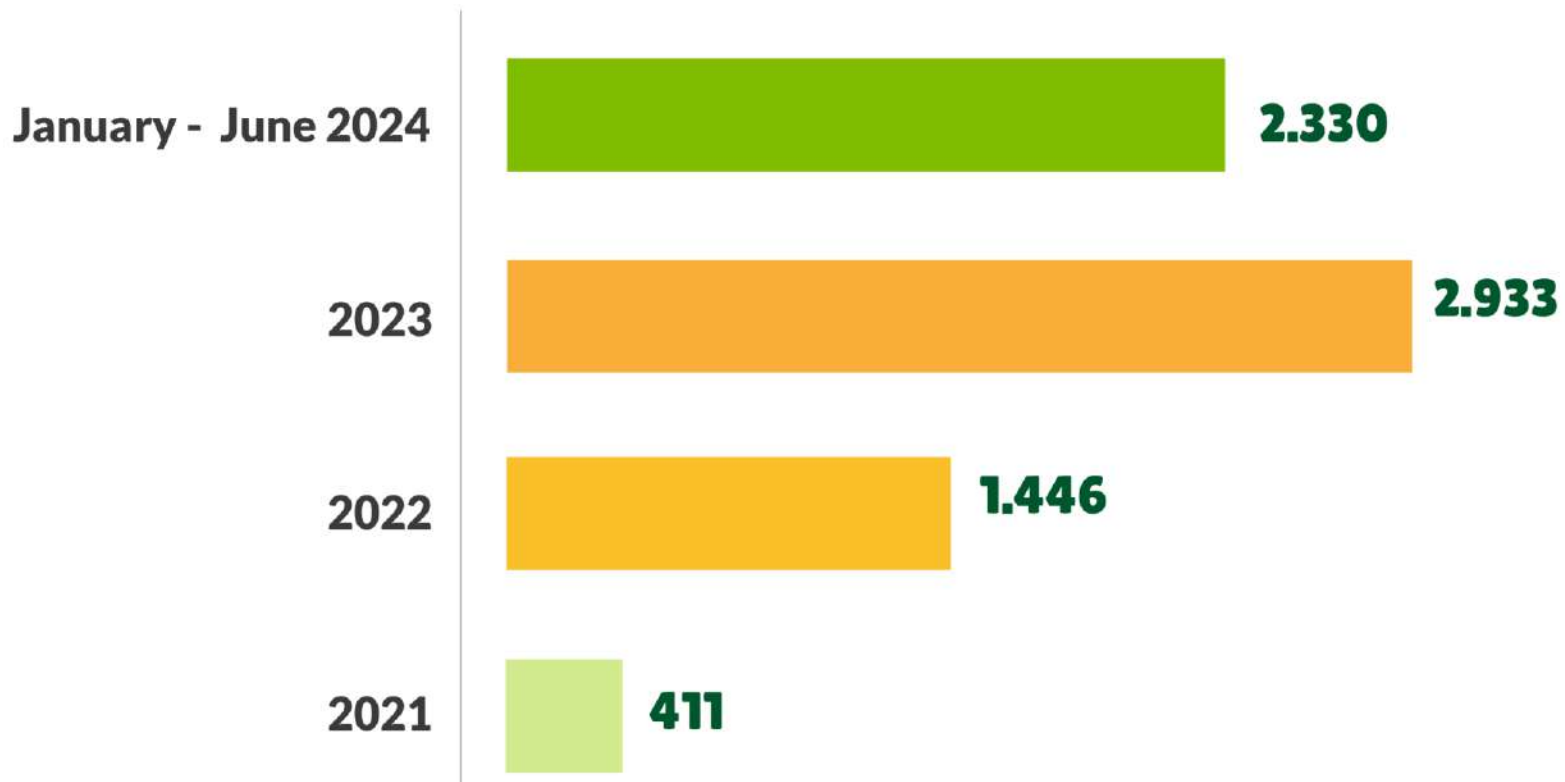
corpohass

	2021	2022	Tons 2023	JANUARY – JUNE 2024
 Hong Kong		654	52.442	96
 United Arab Emirates	148	272	188	163
 China	36	206		
 Saudi Arabia	55	88	117	1.896
 South Korea	138	84	76	104
 Others	2	74	92	0
	31	67	18	71
	411	1.446	2.933	2.330

Source: Dian

EXPORTS TO ASIA

Tons

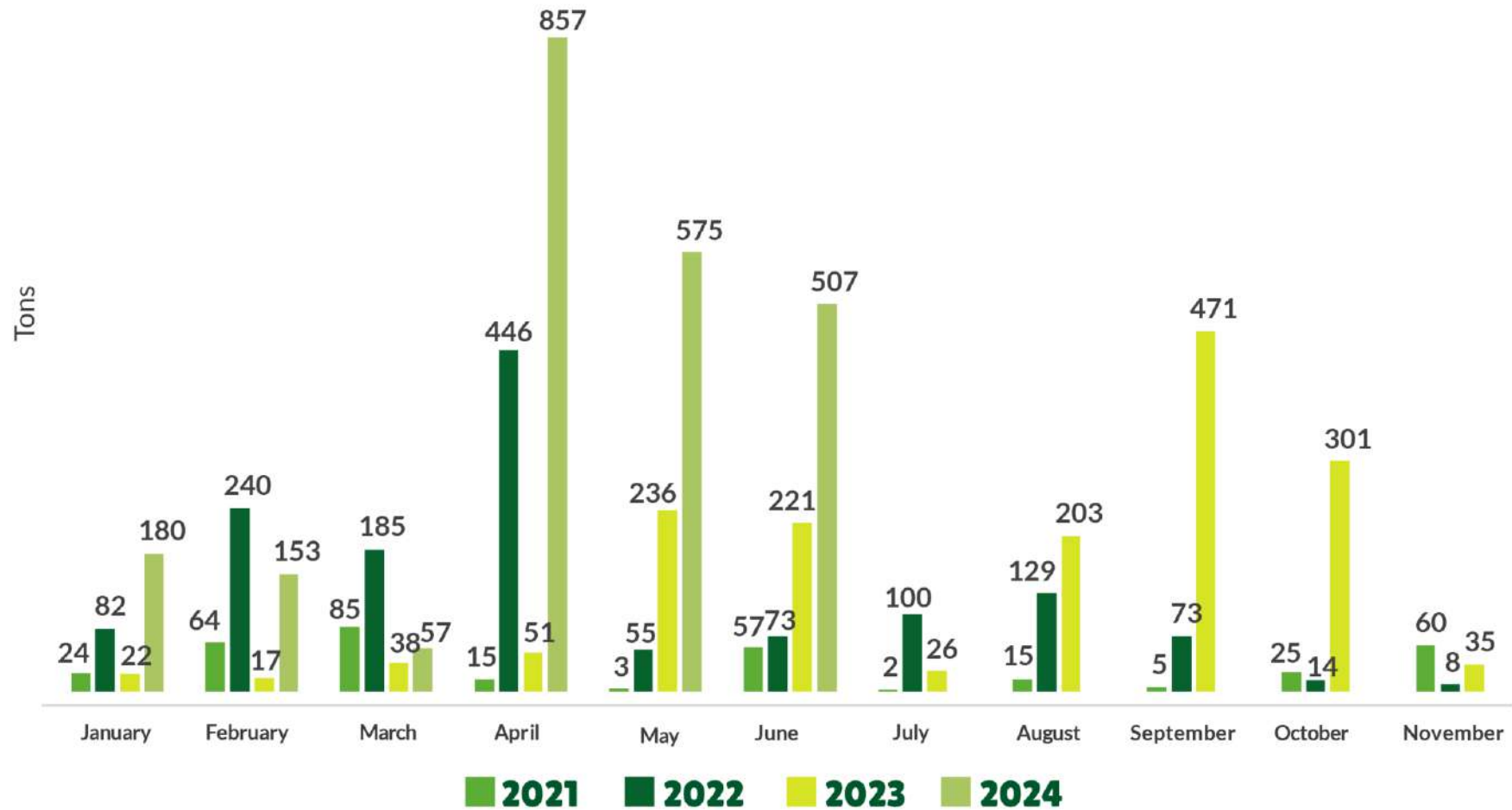


Tons

Source: Dian

EXPORTS TO ASIA

Tons | Month



Source: Dian

Main Markets

LATAM



corpohass

EXPORTS TO LATAM COUNTRIES

Tons

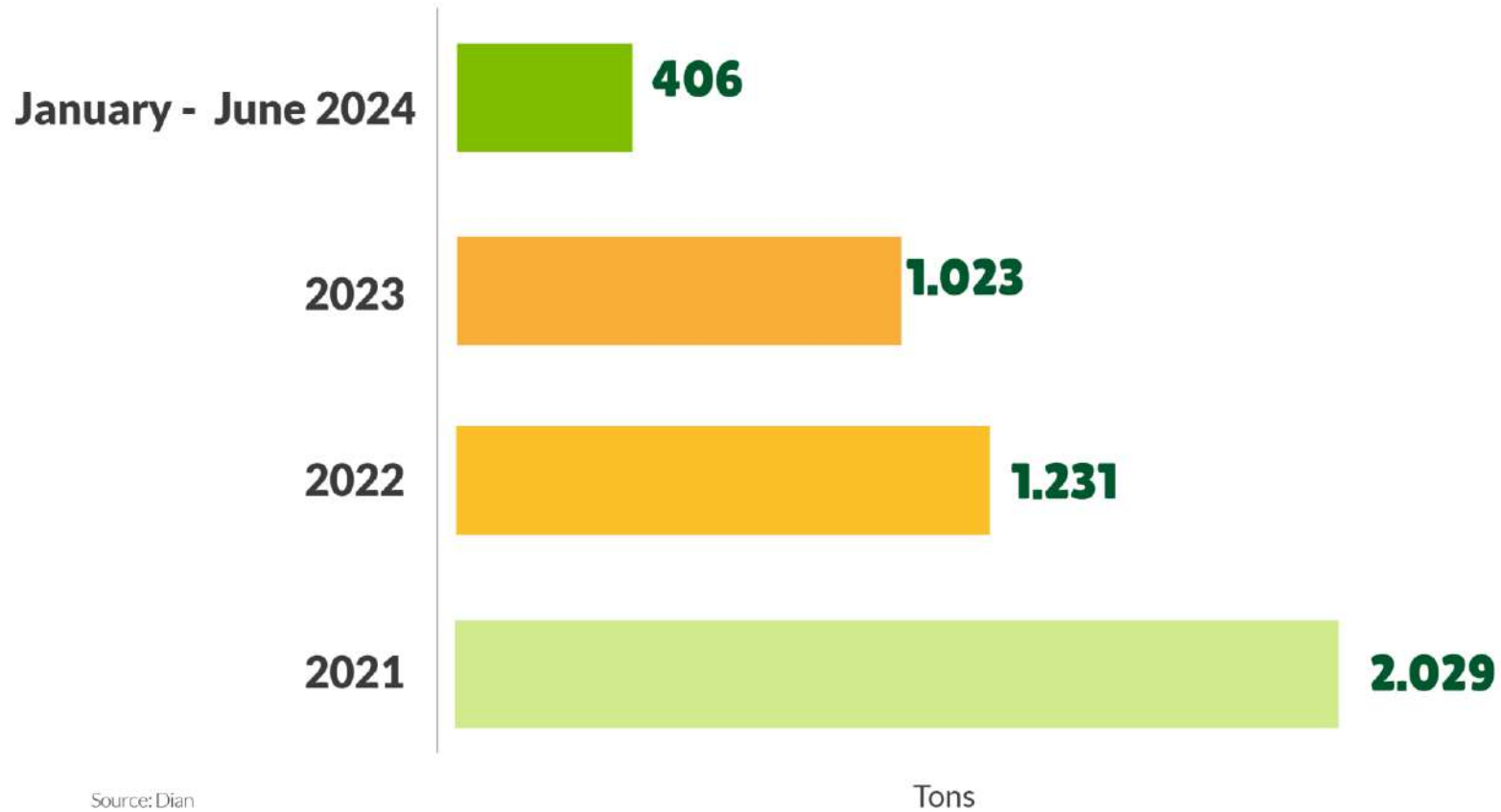
	Tons			
	2021	2022	2023	JANUARY – JUNE 2024
 Argentina	1.031	455	563	2
 Chile	66	24	351	120
 Costa Rica	889	657	46	190
 Guatemala		24		24
 Mexico		24		
 Panama	42	47	63	30
 Peru	0,5			
	2.029	1.231	1.023	406

EXPORTS TO LATAM

Tons

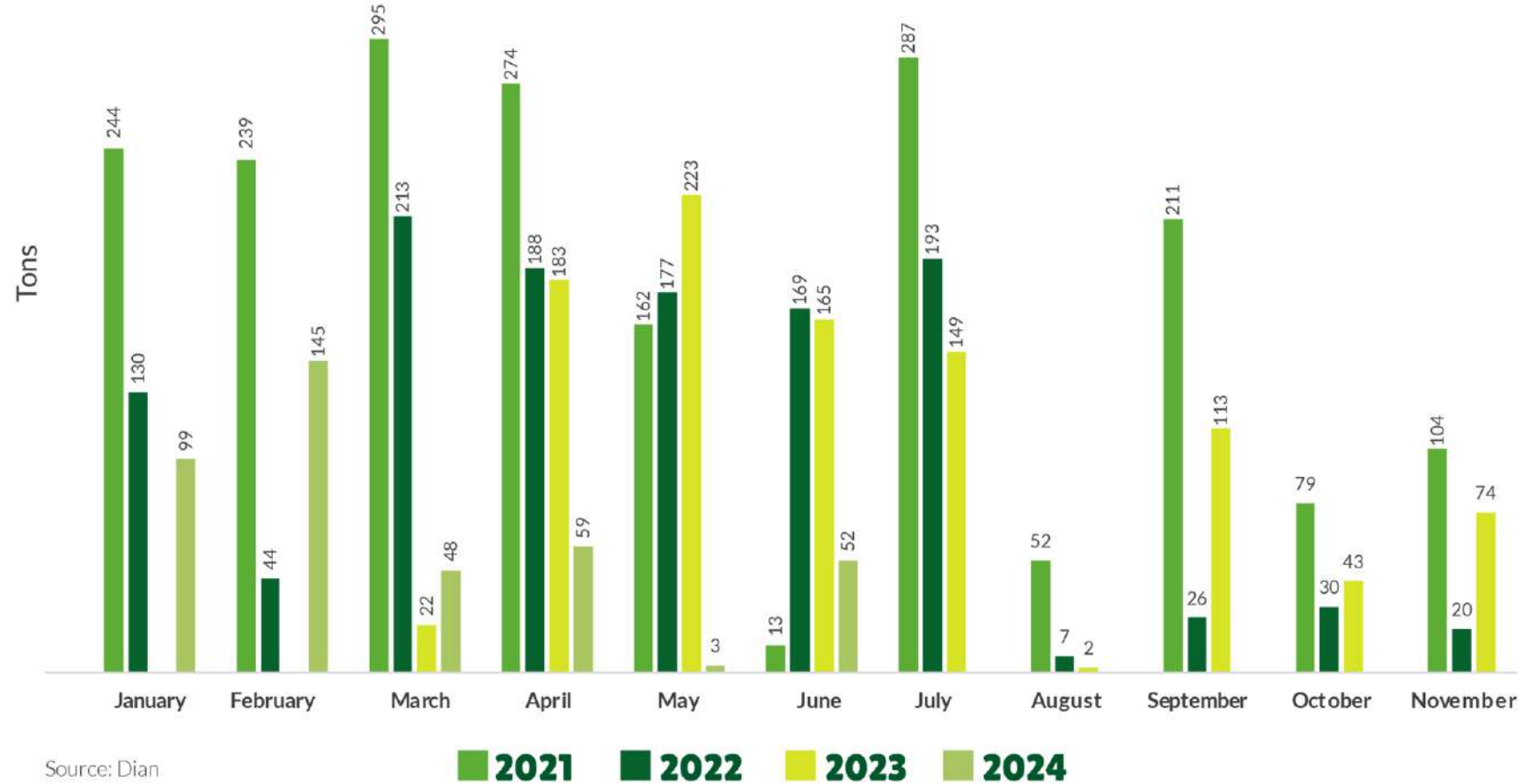


corpohass



EXPORTS TO LATAM

Tons | Month



Source: Dian

Main Markets

CANADA



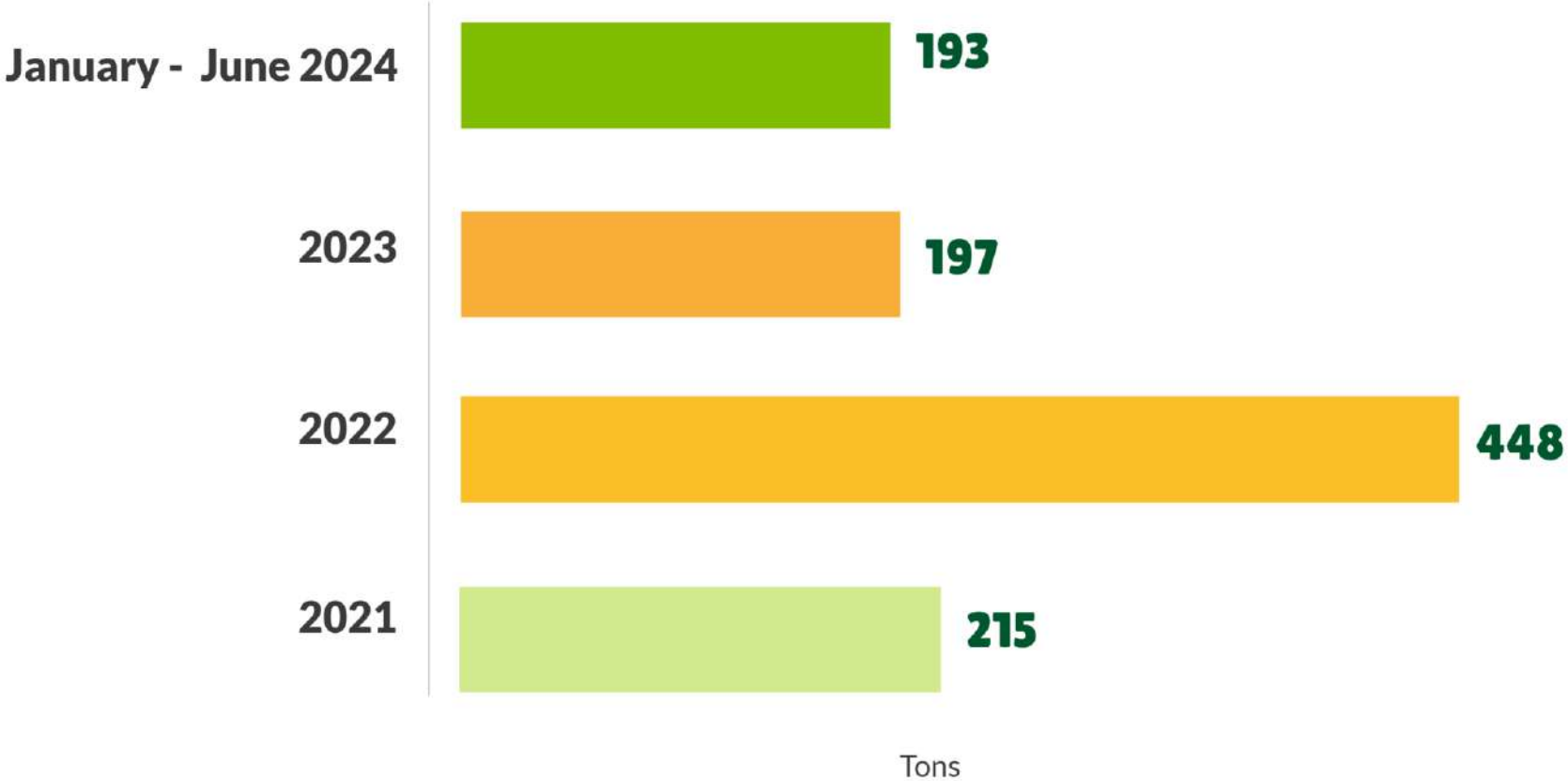
corpohass

EXPORTS TO CANADA

Tons



corpohass



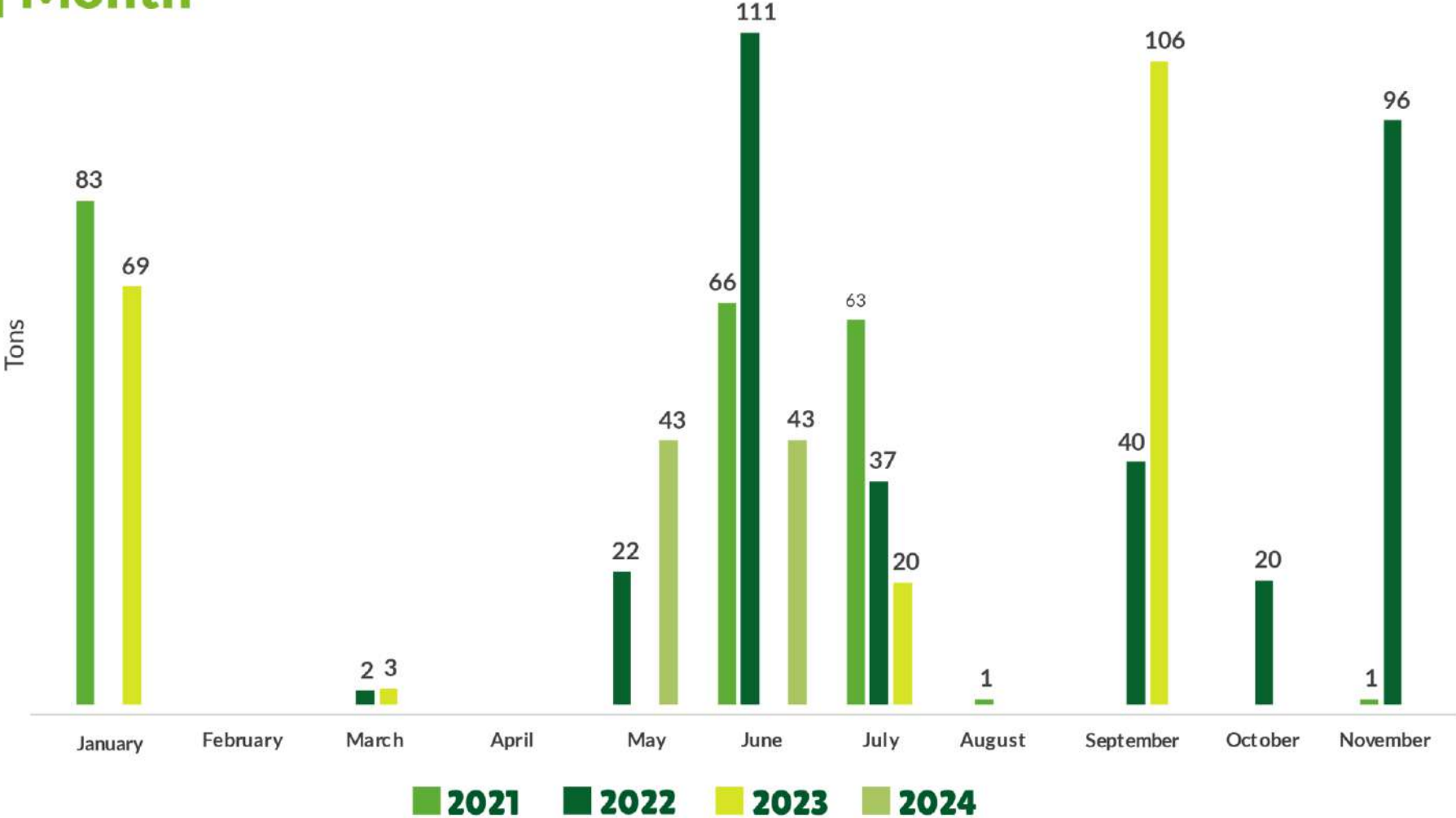
Source: Dian

EXPORTS TO CANADA

Tons | Month



corpohass



Source: Dian