

SECTOR REPORT

Q4 | 2024



AVOCADOS
FROM
COLOMBIA

Sustainability from the heart

corpohass



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INTRODUCTION

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

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



Figures in billions of pesos

Source: Dane

CONTRIBUTIONS TO AGRICULTURAL GDP

Avocados from Colombia



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Source: Dane | MADR

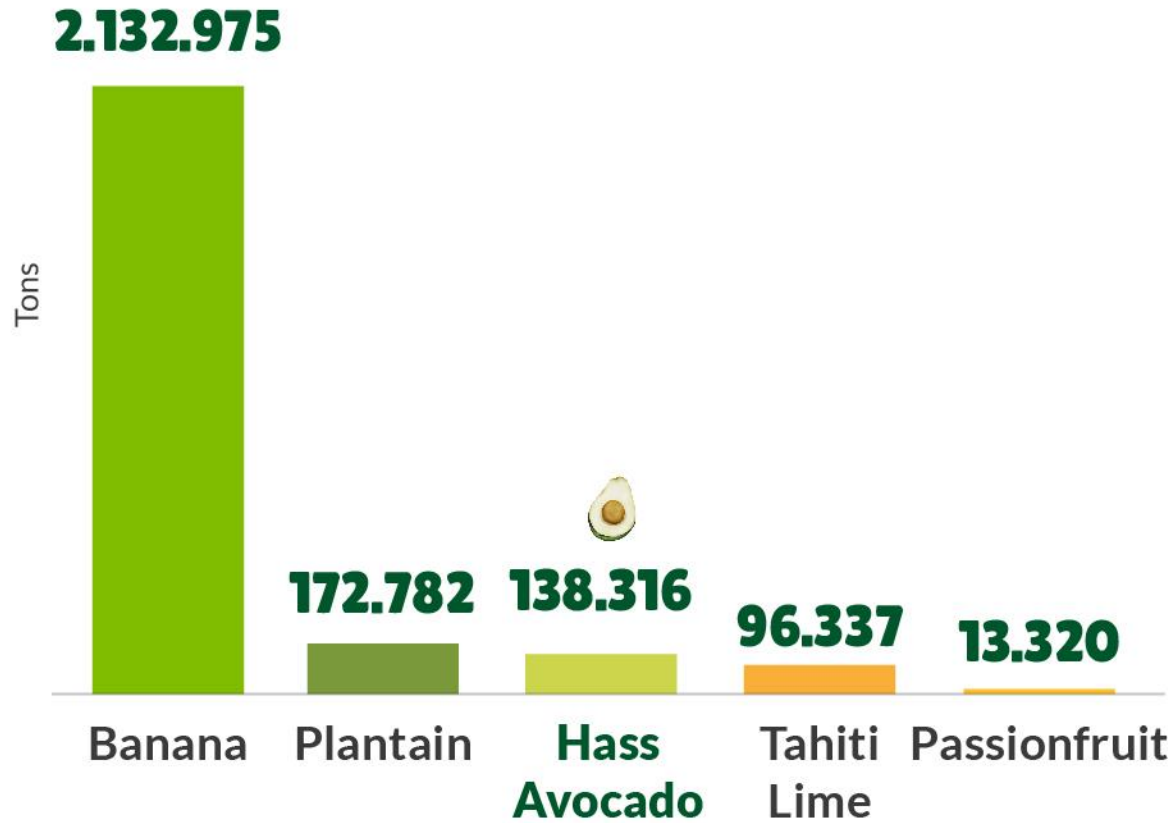
OPEN MARKETS

Avocados from Colombia



FRUIT EXPORTS

January - December 2024



Source: DIAN

\$309.439.320 USD

Income generated by
Avocado

January - December 2024



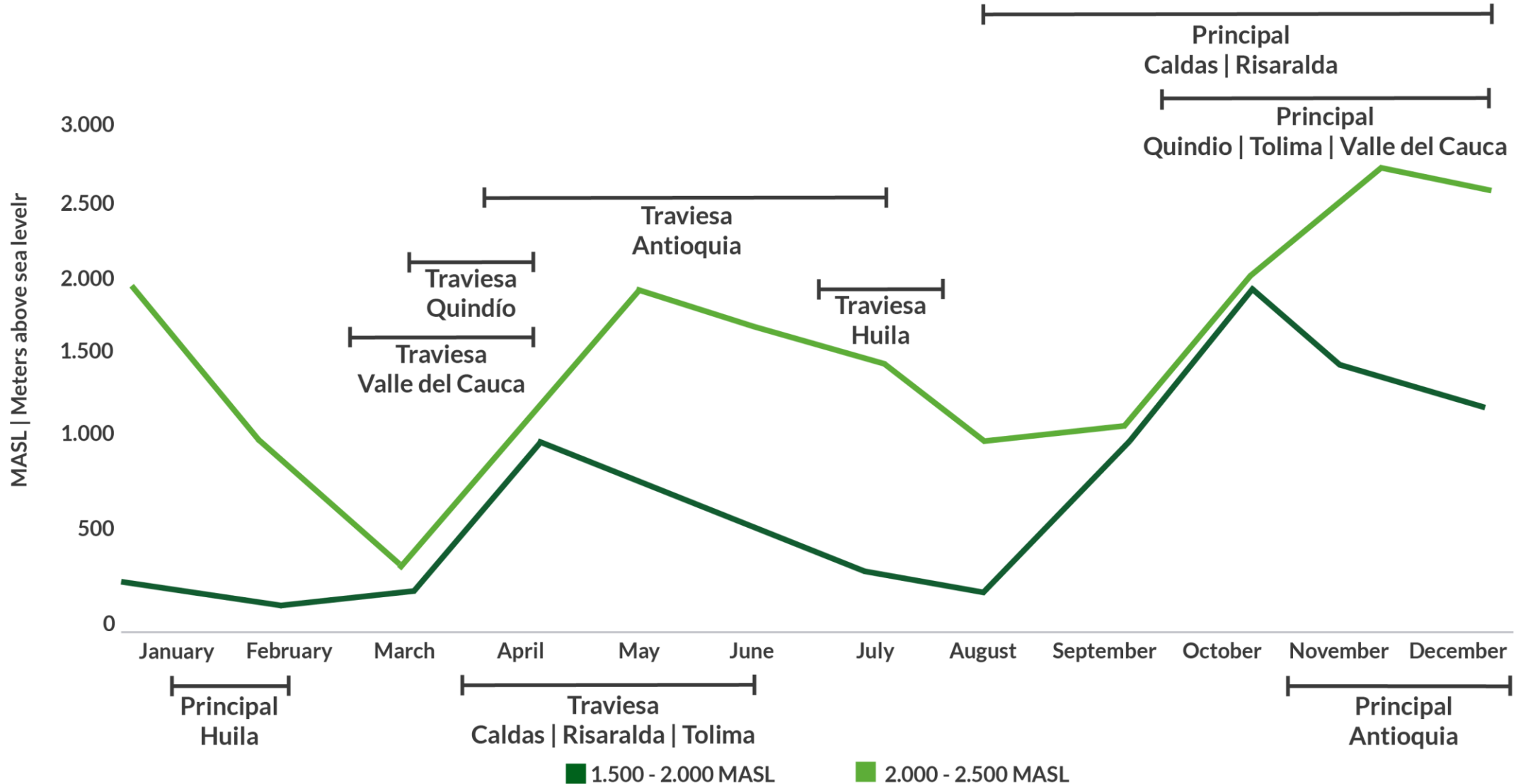
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HARVEST PERIODS

Avocados from Colombia



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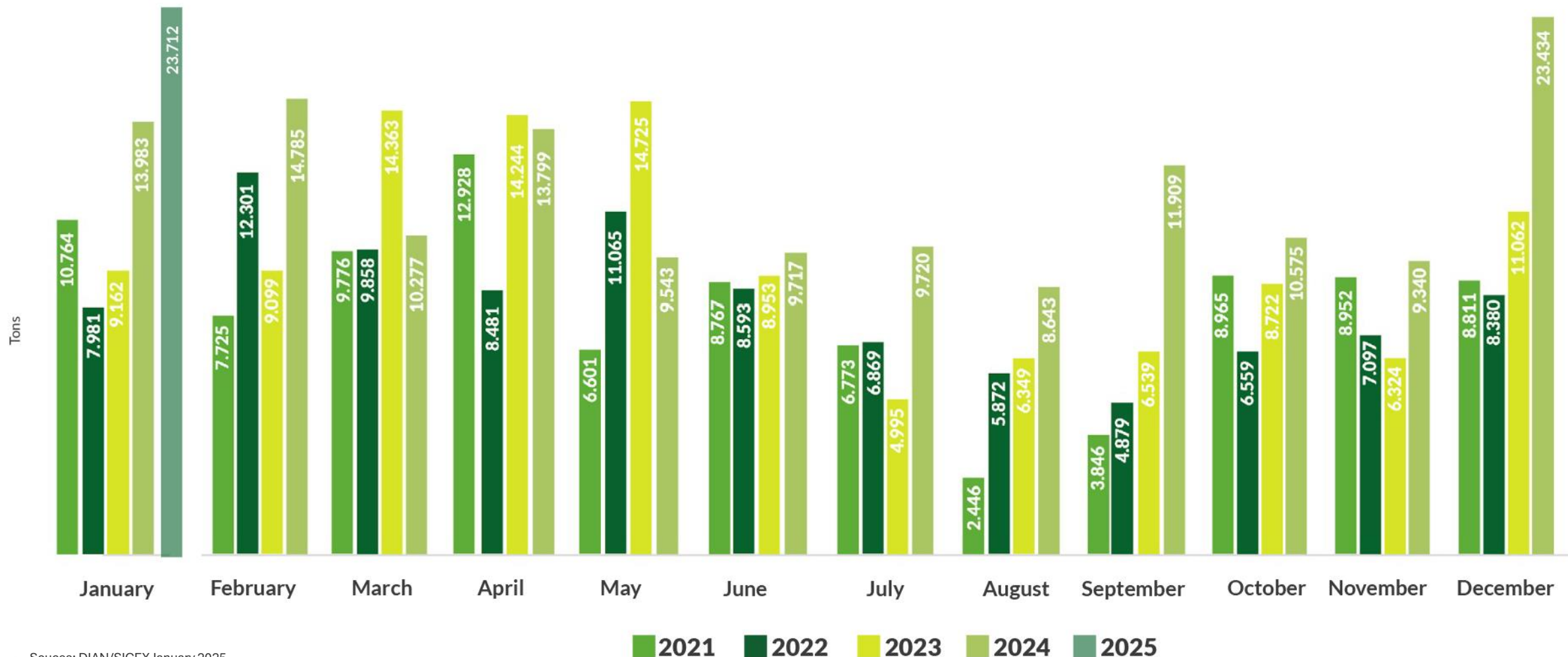
EXPORTS

Avocados from Colombia



Sustainability from the heart

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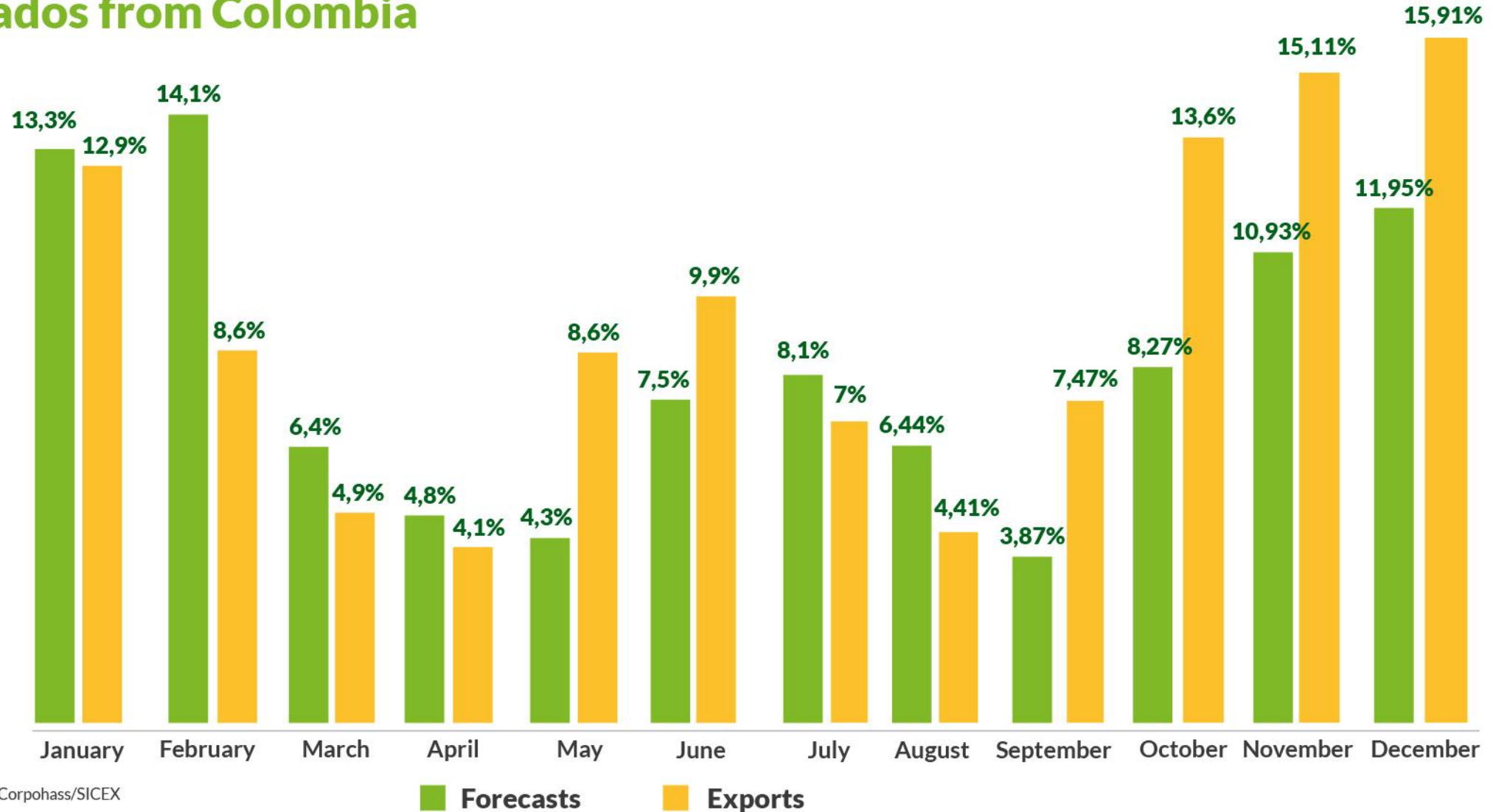
Sources: DIAN/SICEX January 2025

EXPORTS VS FORECASTS

Avocados from Colombia



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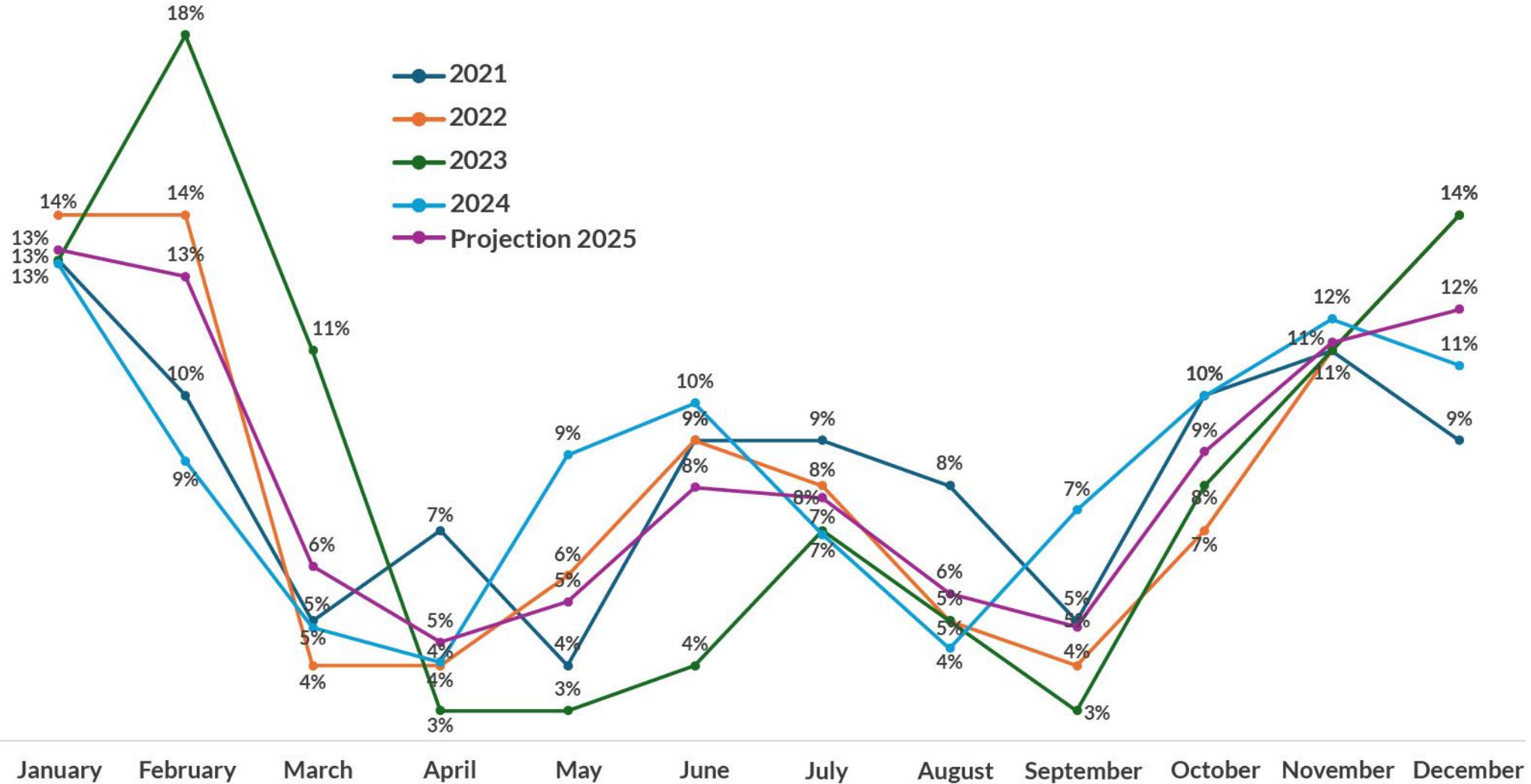
Sources: Corpohass/SICEX

EXPORTS

Avocados from Colombia



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Source: Corpohass

PRODUCTION AREAS



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WHERE IS OUR AVOCADO GROWN?

Avocados from Colombia

*ICA - Corpohass confidentiality and information agreement



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

***Zomac:**
Historical areas affected by
the conflict in Colombia.

	Registered Farms	Registered Hectares
Antioquia	1.952	14.574,7
Caldas	397	9.801,2
Tolima	289	2.211,1
Huila	244	1.028,1
Risaralda	223	2.280,4
Valle del Cauca	166	5.537,3
Nariño	145	203,2
Cauca	128	406
Cundinamarca	91	466,5
Quindío	81	2.976,3
Putumayo	31	86,9
Boyacá	14	35,9
Santander	10	35,7
Norte de Santander	6	35,7
Chocó	2	9,5
Caquetá	1	33
Magdalena	1	28
	3.781	39.749,5

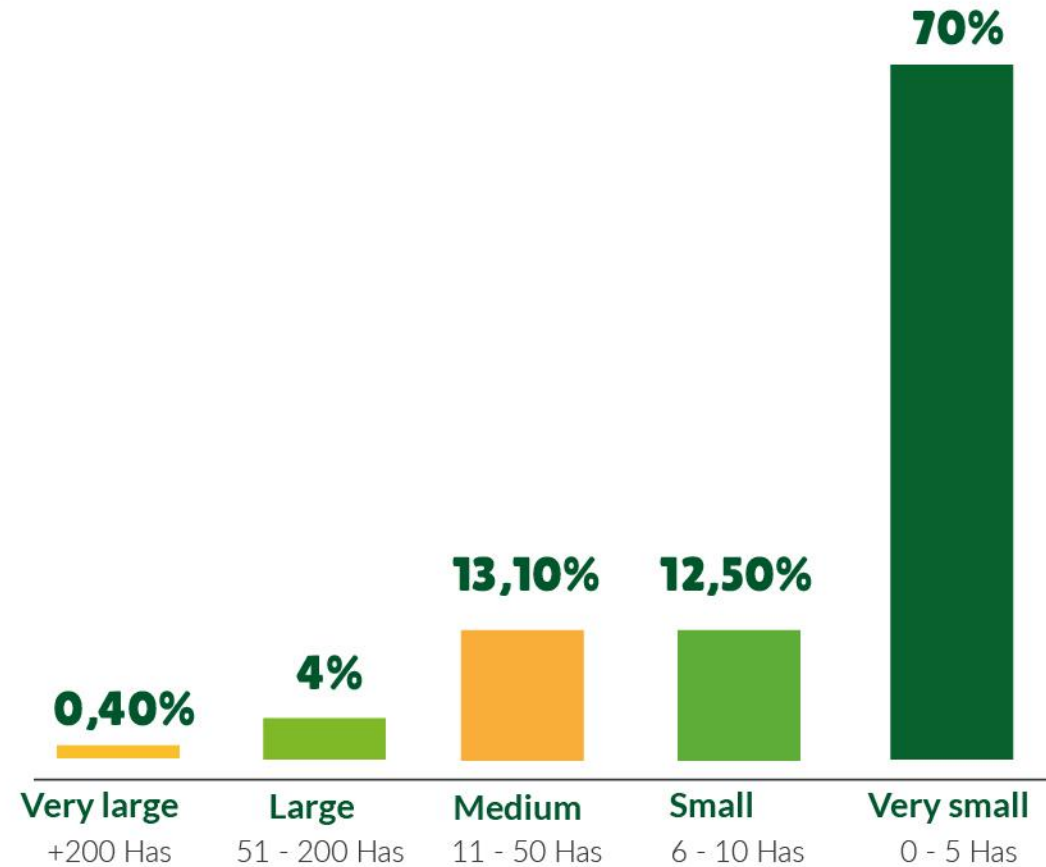
Source: ICA 2024



PRODUCERS

Classification

*ICA - Corpohass confidentiality and information agreement



Source: ICA 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

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

RELATED AREAS

With Operational Work Plan (OWP)

*ICA - Corpohass confidentiality and information agreement

	 Farms	 Hectares
 USA	723	19.580,50
 Argentina	393	11.879,10
 Peru	220	9.001,60
 Japan	110	6,082,10
 South Korea	71	4.454,70
 Chile	16	918,10
 China	-	-

ENABLED AREAS

With Operational Work Plan (OWP)

*ICA - Corpohass confidentiality and information agreement

	 Farms	 Hectares
 USA	423	12.669,78
 Argentina	244	8.384,31
 Peru	125	5.741,35
 Japan	91	5.285,05
 South Korea	56	3.827,77
 Chile	11	793,06
 China	-	-

Source: ICA 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.

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

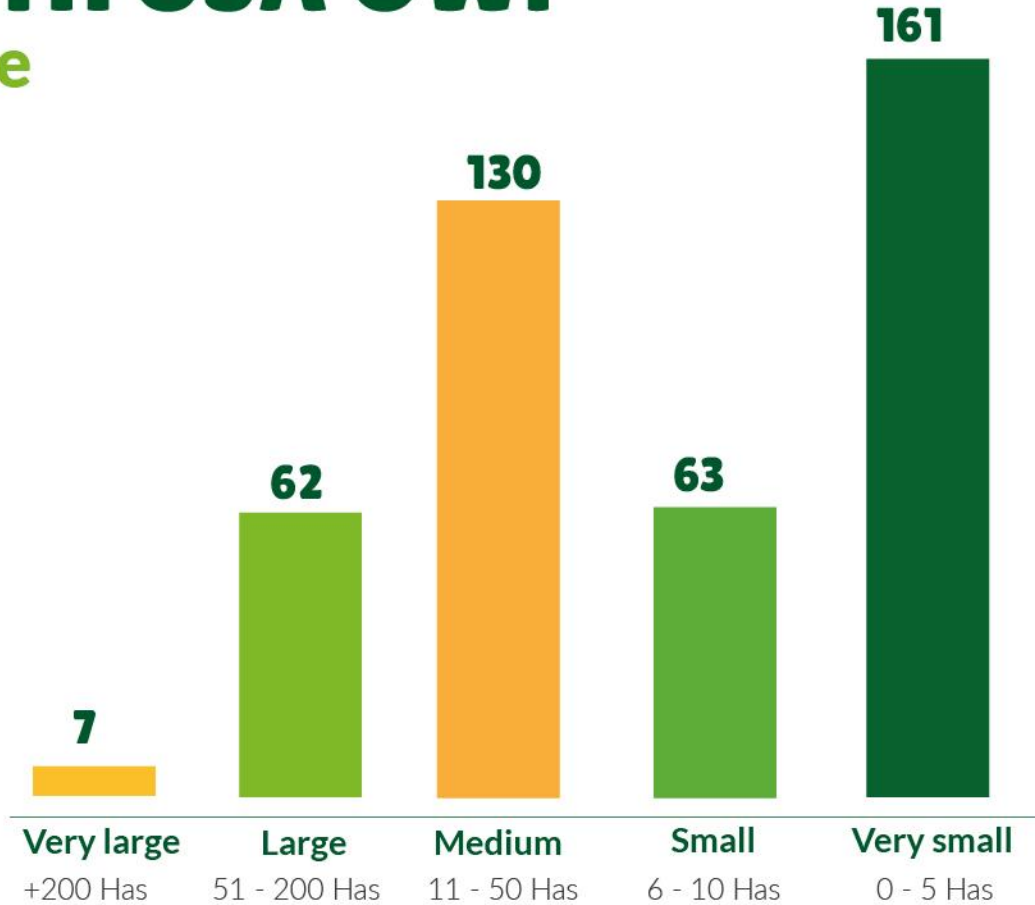
	 Farms	 Hectares
Antioquia	286	4.749,35
Caldas	61	4.028,98
Huila	17	169,82
Quindío	26	1.521,52
Risaralda	7	217,30
Tolima	8	104,44
Valle Del Cauca	18	1.878,37
	423	12.669,78

Source: ICA
Up to day: February 2025



FARMS WITH USA OWP

According to size



Source: ICA
Up to day: February 2025



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



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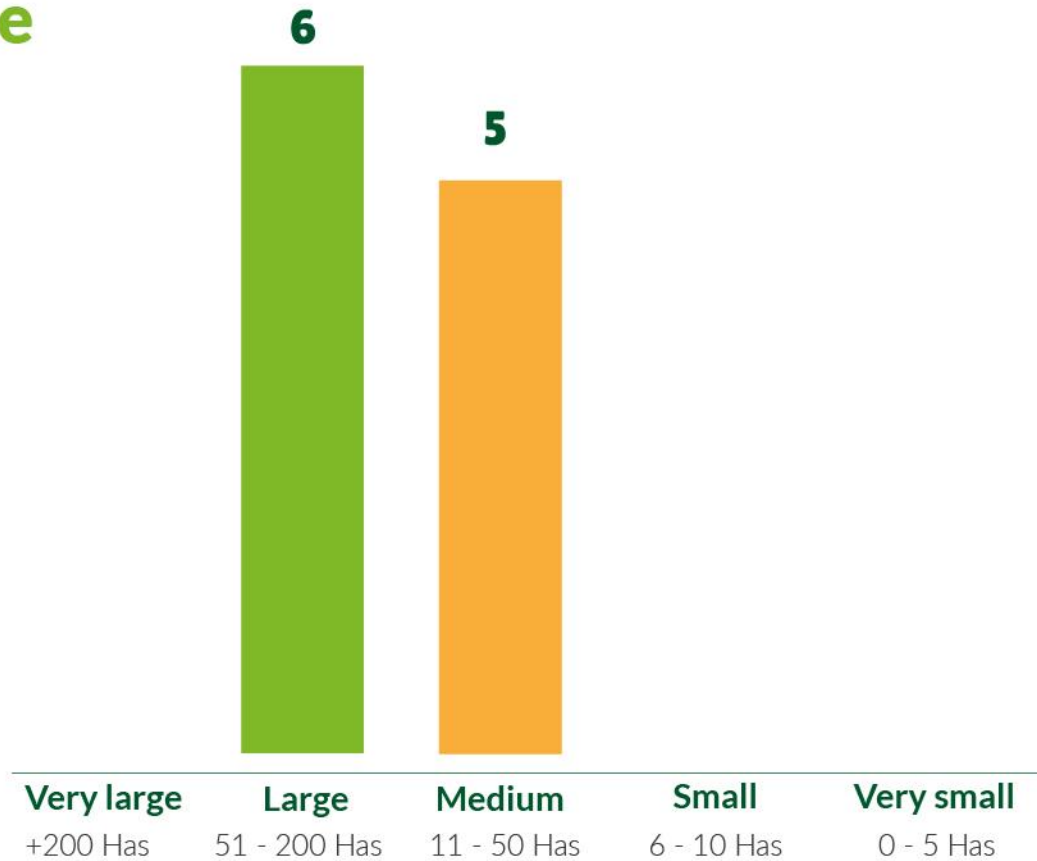
	 Farms	 Hectares
Caldas	11	793,06

Source: ICA
Up to day: February 2025



FARMS WITH CHILE OWP

According to size



Source: ICA
Up to day: February 2025



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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](#)



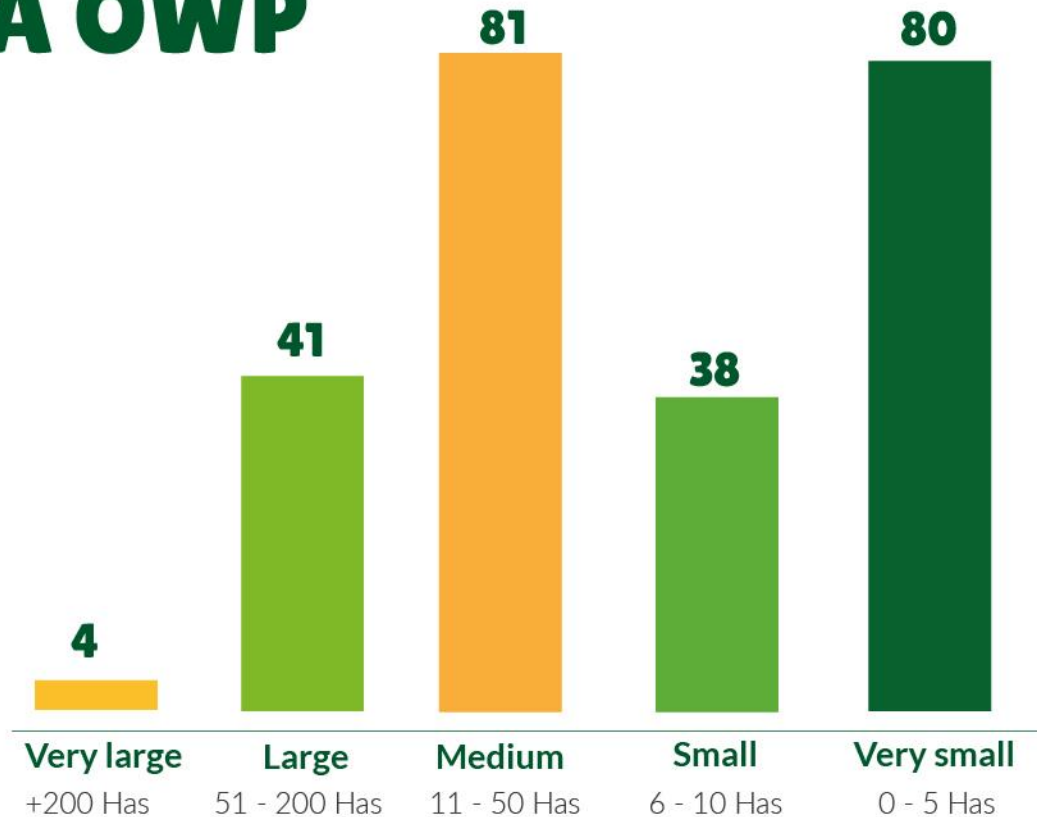
FARMS WITH ARGENTINA OWP

	 Farms	 Hectares
Antioquia	162	3.230,95
Caldas	42	3.098,25
Quindío	15	1.054,3
Risaralda	4	165,5
Tolima	14	48,64
Valle Del Cauca	7	786,67
	244	8.384,31

Source: ICA
Up to day: February 2025



PRODUCERS WITH ARGENTINA OWP Classification



Source: ICA
Up to day: February 2025



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

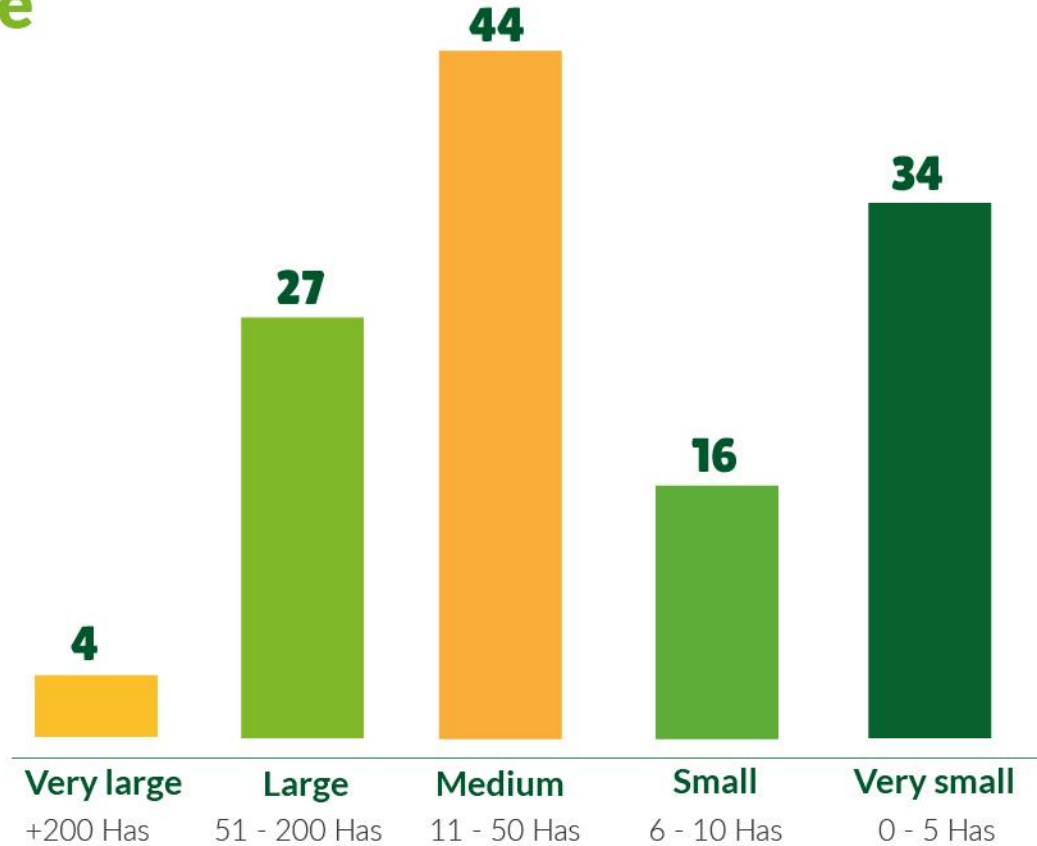
	 Farms	 Hectares
Antioquia	82	2.227,5
Caldas	34	2.349,38
Quindío	3	453
Risaralda	1	19,7
Tolima	1	2,5
Valle Del Cauca	4	689,27
	125	5.741,35

Source: ICA
Up to day: February 2025



FARMS WITH PERU OWP

According to size



Source: ICA
Up to day: February 2025



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



The ICA is awaiting a response from MAFF, China's phytosanitary authority, regarding the production sites and packing plants authorized for export to this Asian country (2024-2025 season).



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 OWP JAPAN

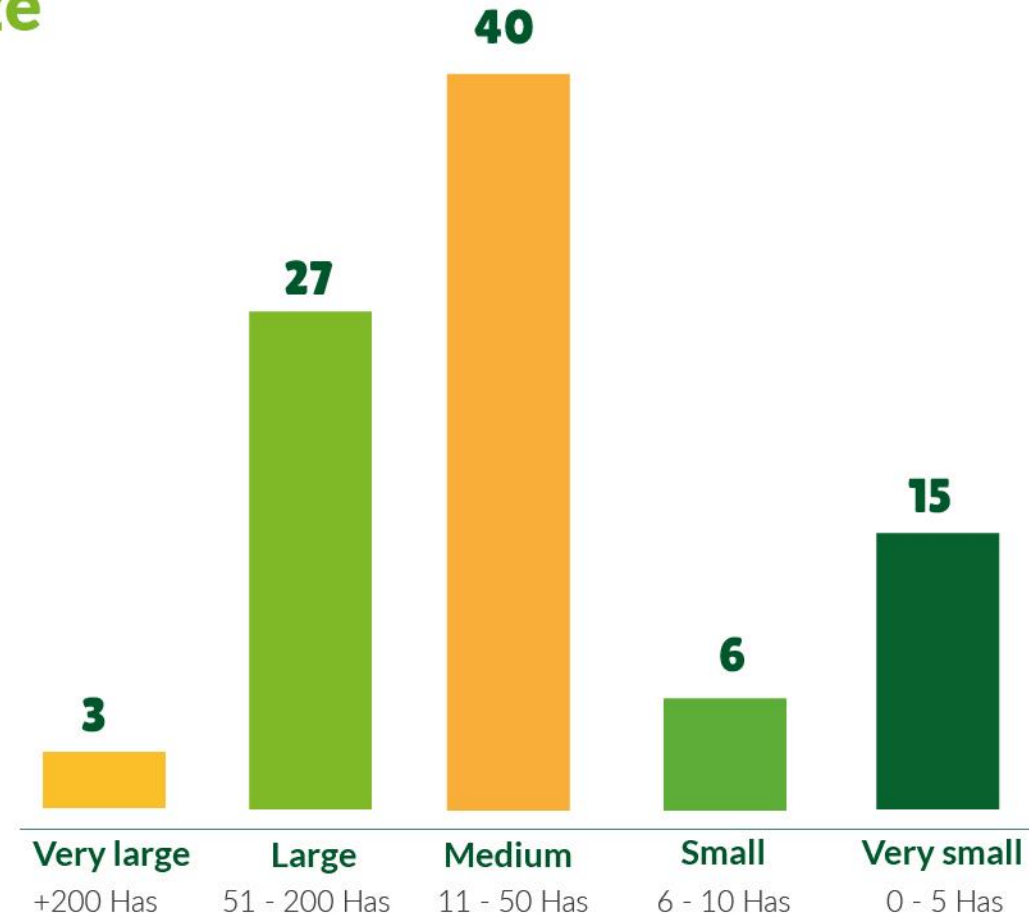
	 Farms	 Hectares
Antioquia	35	853,11
Caldas	31	2.107,9
Quindío	2	475
Risaralda	7	370,9
Valle Del Cauca	16	1.478,14
	91	5.285,05

Source: ICA
Up to day: February 2025



FARMS WITH OWP JAPAN

According to size



Source: ICA
Up to day: February 2025



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 OWP SOUTH KOREA

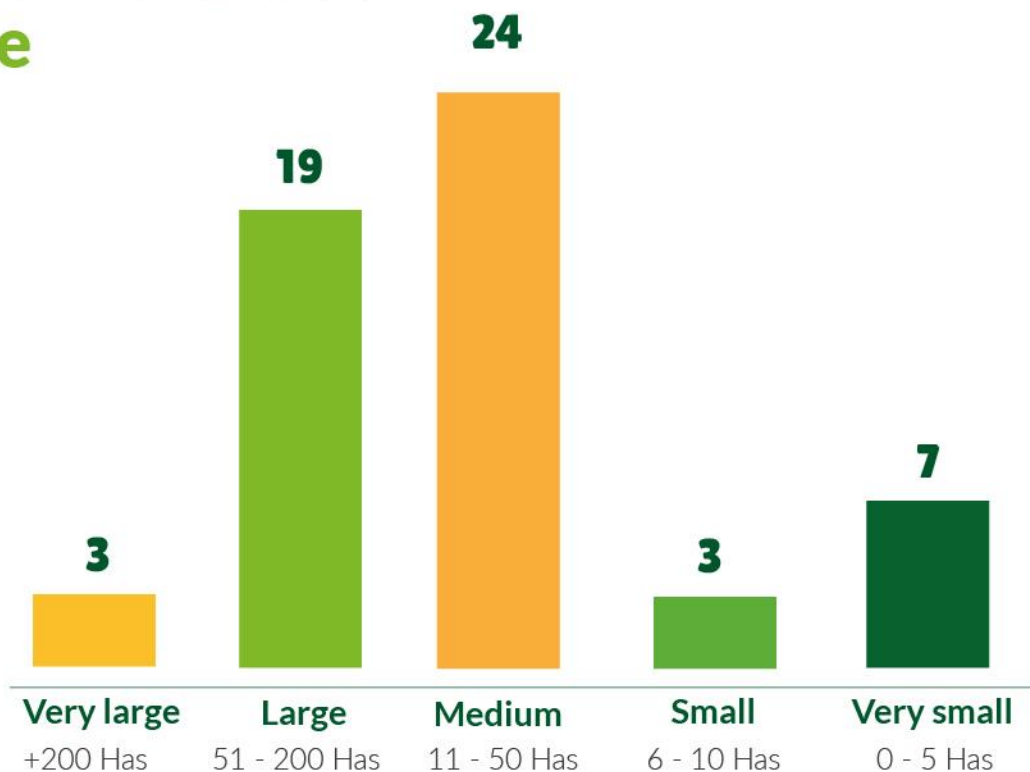
	 Farms	 Hectares
Antioquia	22	683,01
Caldas	19	1.325,47
Quindío	1	420
Risaralda	7	409,9
Valle Del Cauca	7	989,39
	56	3.827,77

Source: ICA
Up to day: February 2025



FARMS WITH SOUTH KOREA OWP

According to size



Source: ICA
Up to day: February 2025

EXPORTS



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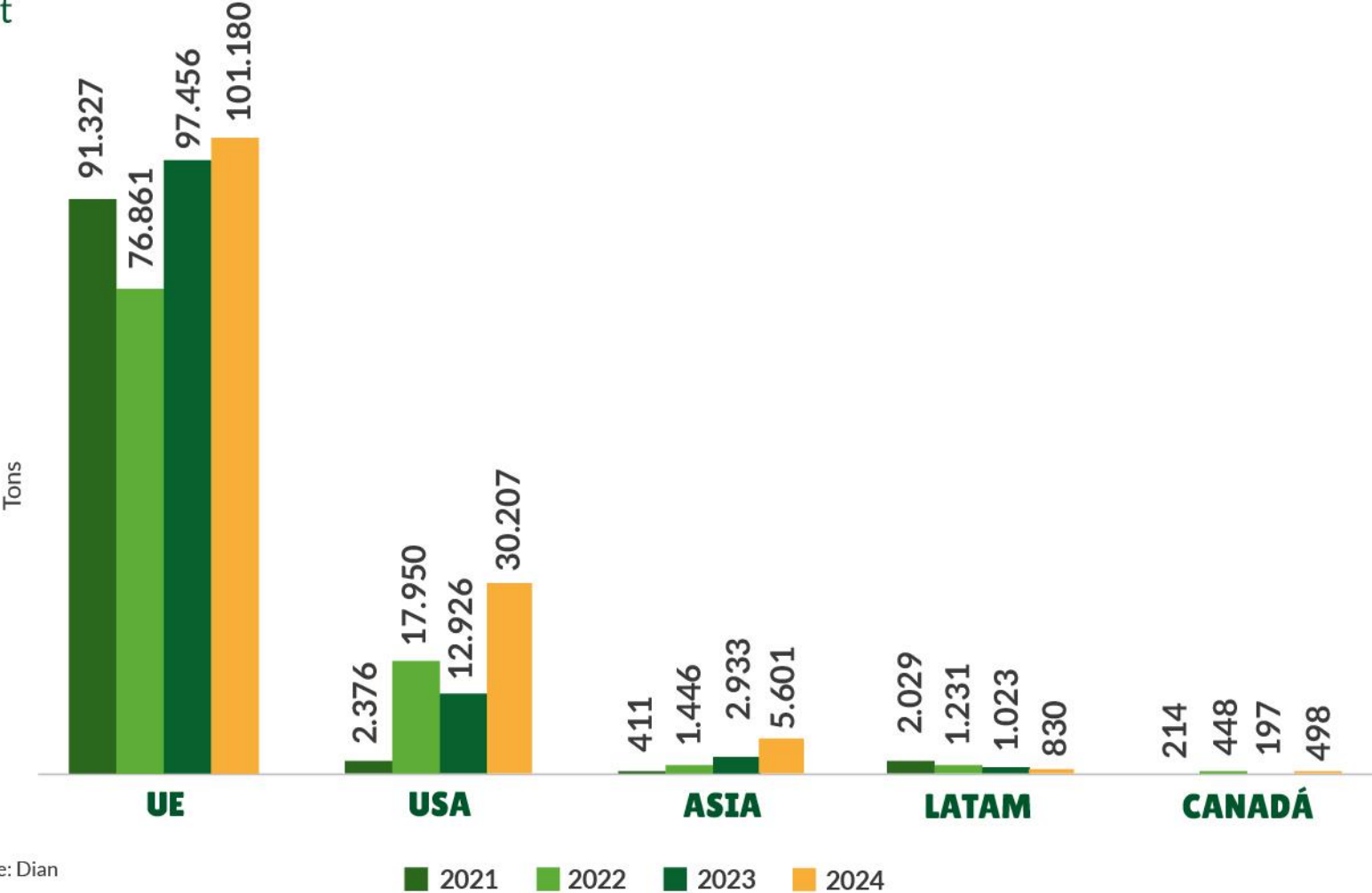
EXPORT DESTINATIONS

Avocados from Colombia

*ICA - Corpohass confidentiality and information agreement



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Source: Dian

Main markets

EUROPE

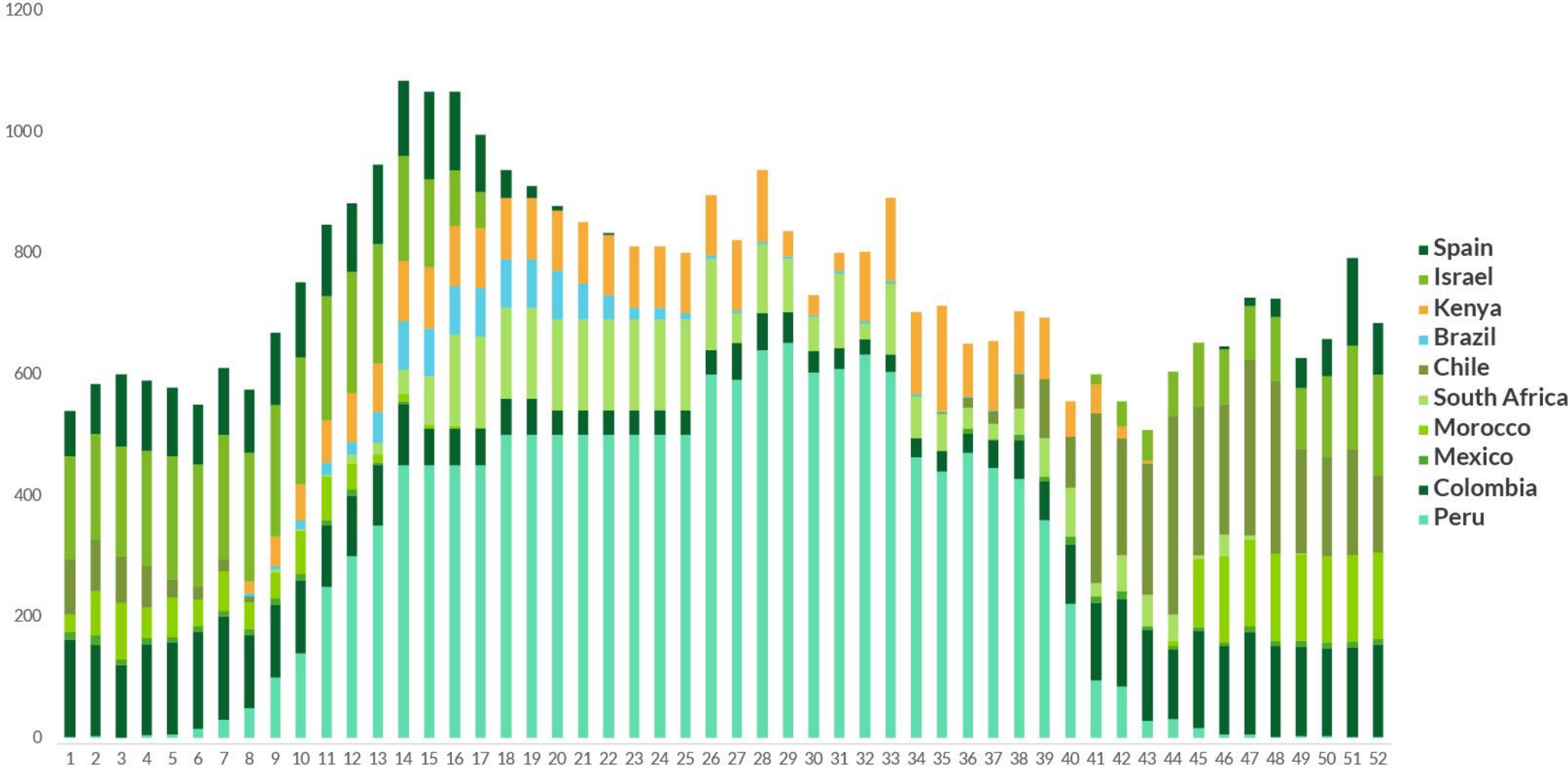


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EUROPE SUPPLIERS



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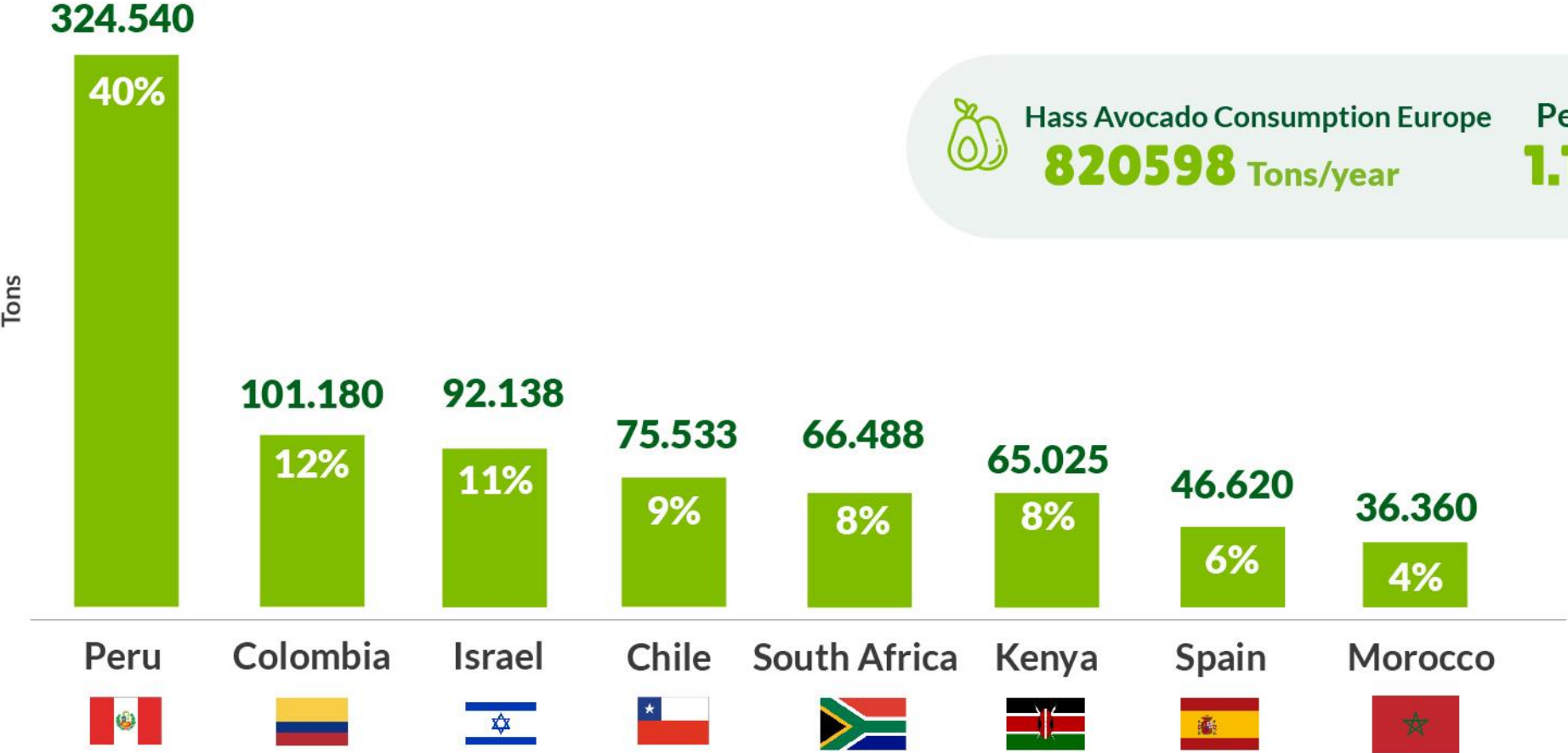
*2024 Kenyan volumes are combined with Tanzania
Source: Avobook

EUROPEAN SUPPLIERS

2024



corpohass



 Hass Avocado Consumption Europe **820598** Tons/year

Per capita consumption **1.1 kg Per capita**

Source: Avobook

EXPORTS TO EUROPEAN COUNTRIES

Tons

	2021	2022	2023	2024
 Netherlands	50.086	46.764	53.472	60.154
 Spain	11.807	9.236	13.996	11.546
 United Kingdom	11.521	10.727	12.459	11.507
 Belgium	5.893	3.264	5.579	9.868
 Germany	3.646	2.724	5.407	3.826
 France	5.462	2.239	5.257	2.905
Others	2.914	1.907	1.286	1.374
	91.329	76.861	97.456	101.180

Sources: DIAN

EXPORTS TO EUROPE

Tons



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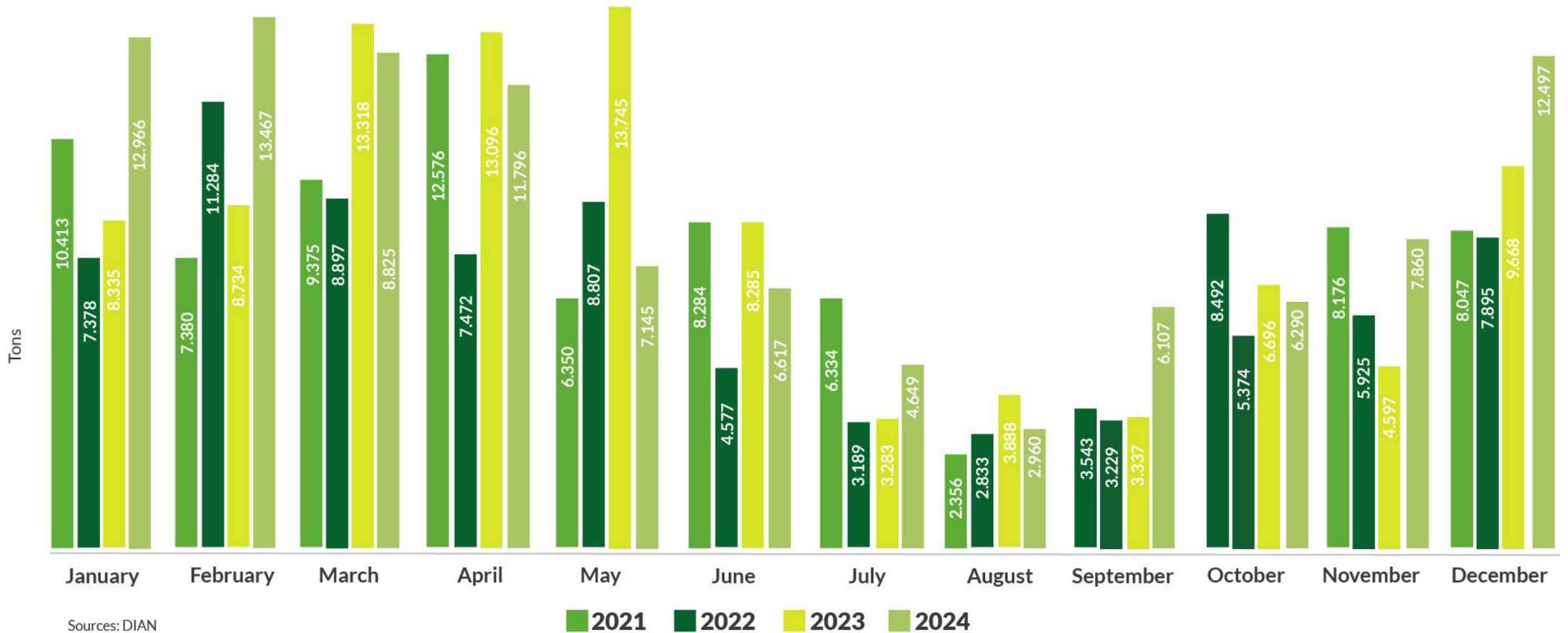
Sources: DIAN

EXPORTS TO EUROPE

Tons | Month



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Sources: DIAN

Main markets

USA

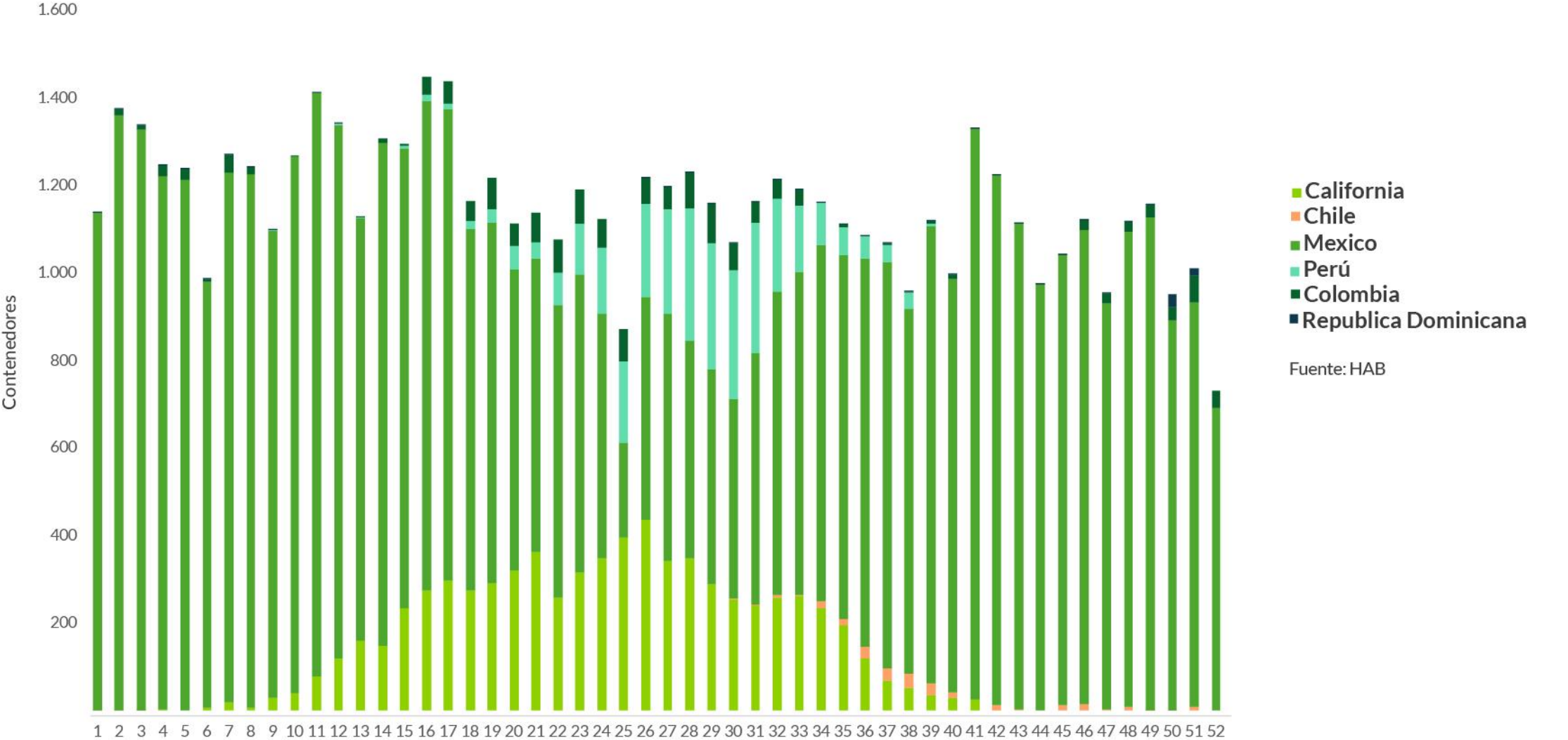


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USA SUPPLIERS



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USA SUPPLIERS

2024



Hass Avocado Consumption USA
1'329.847 Tons/year

Per capita consumption
4 kg per capita

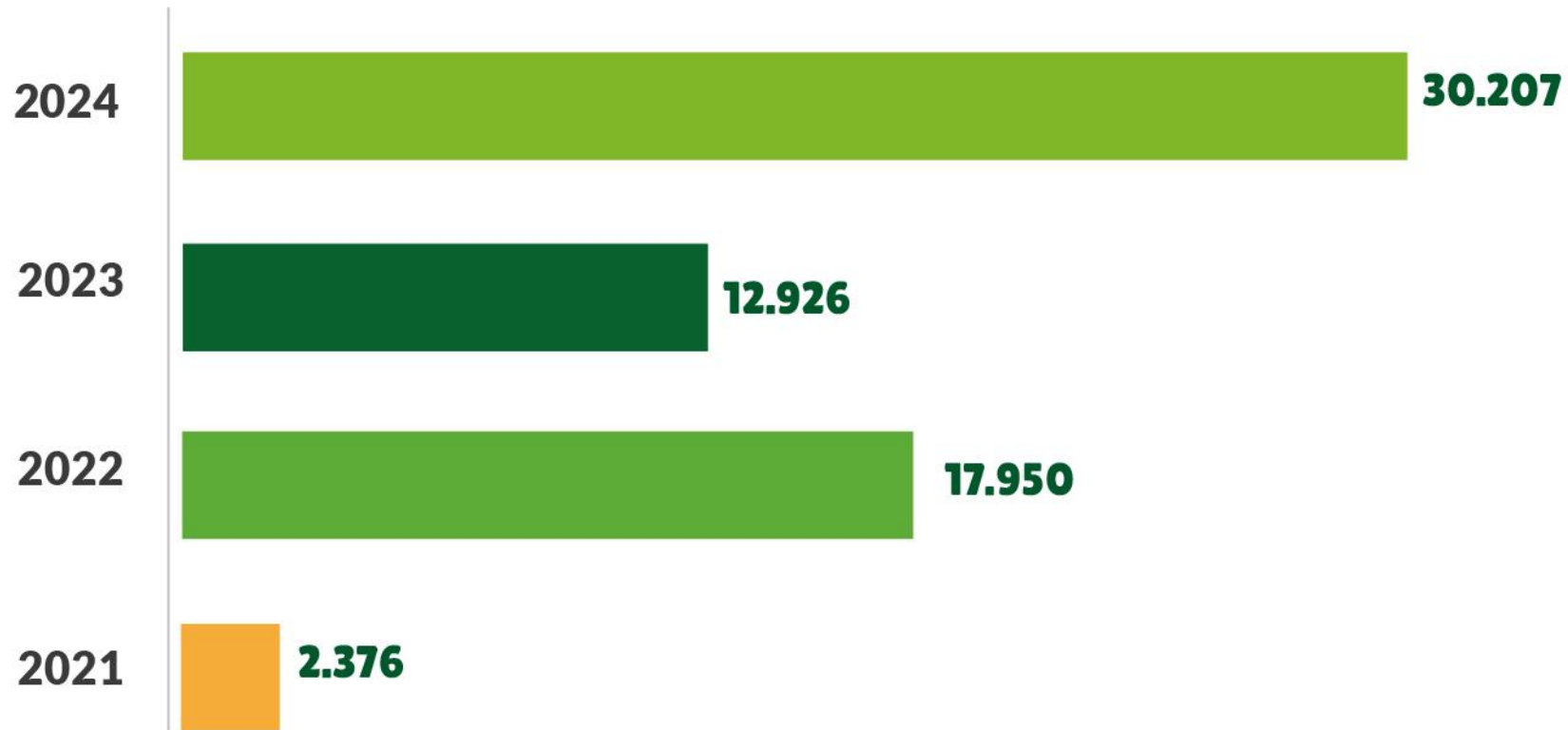
Source: HAB

EXPORTS TO USA

Tons



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Sources: DIAN

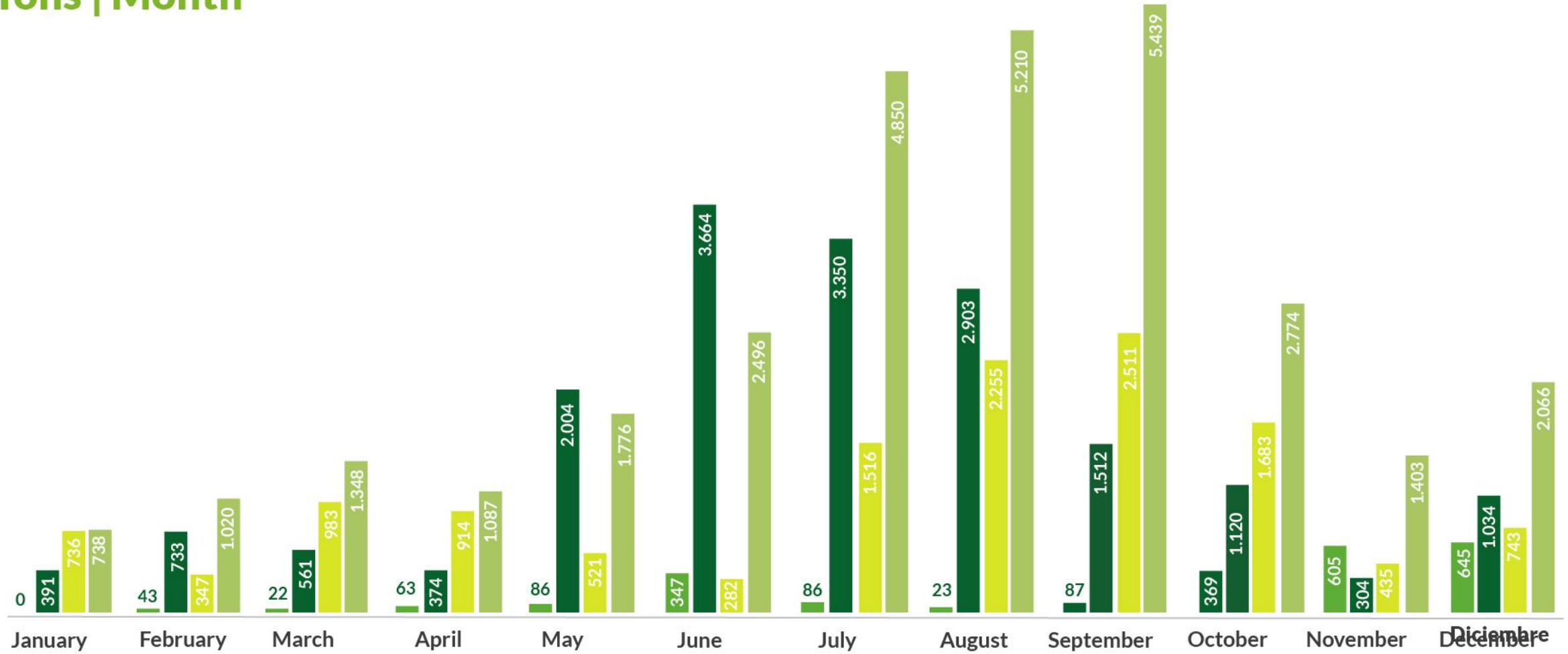
EXPORTS TO USA

Tons | Month



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Tons



Sources: DIAN

2021 2022 2023 2024

USA PORTS

Entry Avocados from Colombia



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Foreign Port	% reception
Philadelphia	66,7%
Port Everglades	14,5%
Miami	16,7%
Los Angeles	1,0%
Others	1,1%

Sources: USDA and SICEX

Main markets







ASIA



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EXPORTS TO ASIAN COUNTRIES

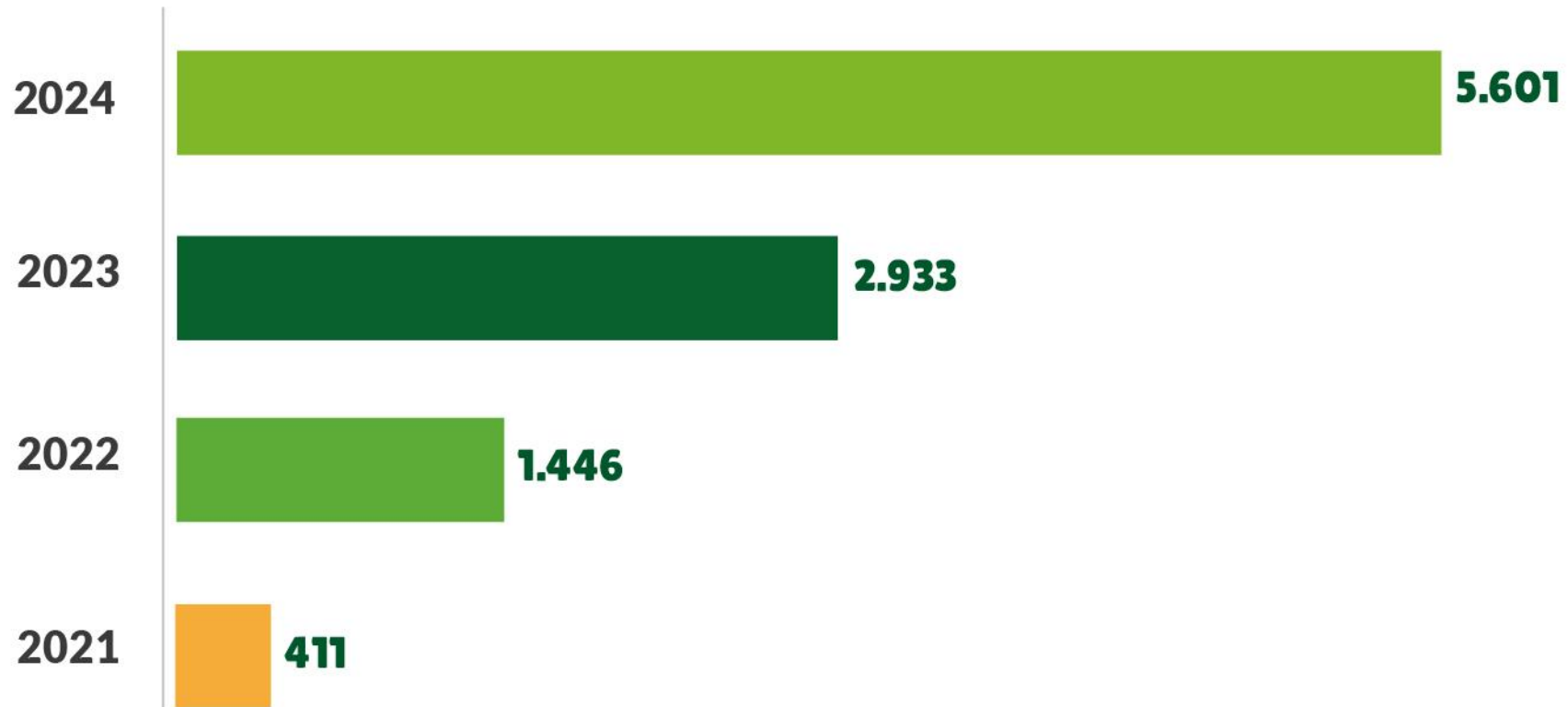
Tons

	2021	2022	2023	2024
 Hong Kong	0	654	2.442	96
 United Arab Emirates	148	272	188	180
 Japan	36	206	0	0
 China	55	88	117	5.126
 Saudi Arabia	138	84	76	124
 South Korea	2	74	92	0
Other	31	67	18	75
	411	1.446	2.933	5.601

Sources: DIAN

EXPORTS TO ASIA

Tons



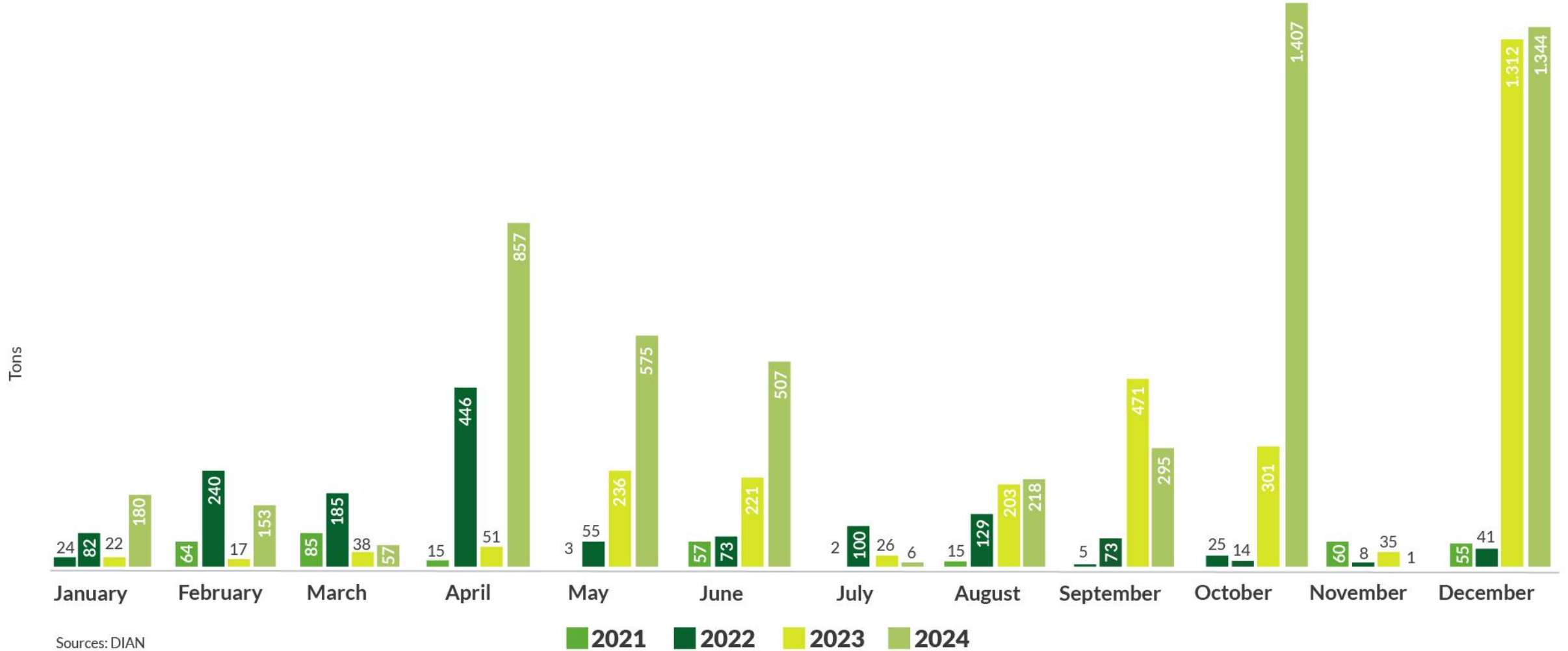
Source: DIAN

EXPORTS TO ASIA

Tons | Month



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Sources: DIAN

Main markets

LATAM



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EXPORTS TO LATIN AMERICAN COUNTRIES

Tons

	2021	2022	2023	2024
 Argentina	1031	455	563	128
 Chile	66	24	351	120
 Costa Rica	889	657	46	214
 Guatemala	0	24	0	72
 Mexico	0	24	0	0
 Panama	42	47	63	128
 Peru	0,5	0	0	168
Others	2.029	1.231	1.023	830

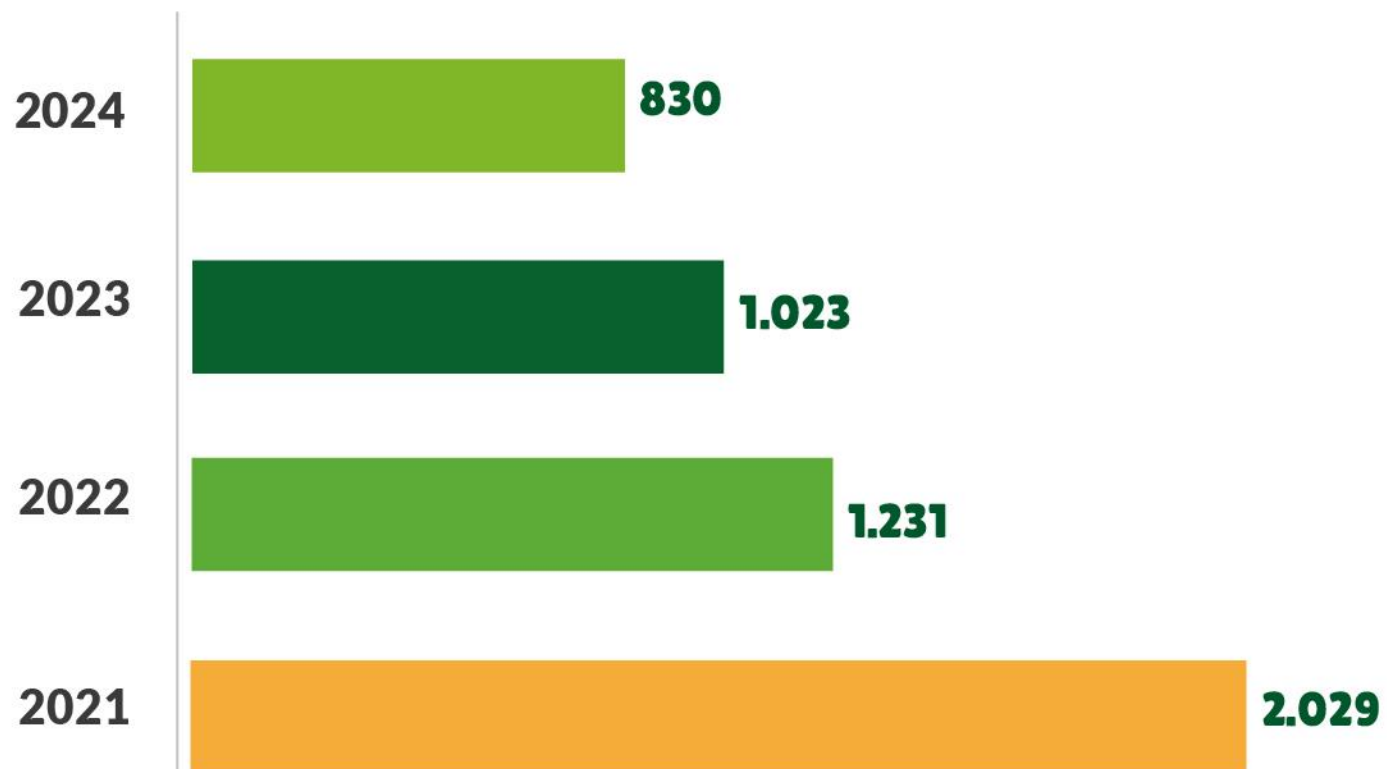
Sources: DIAN

EXPORTS TO LATAM

Tons



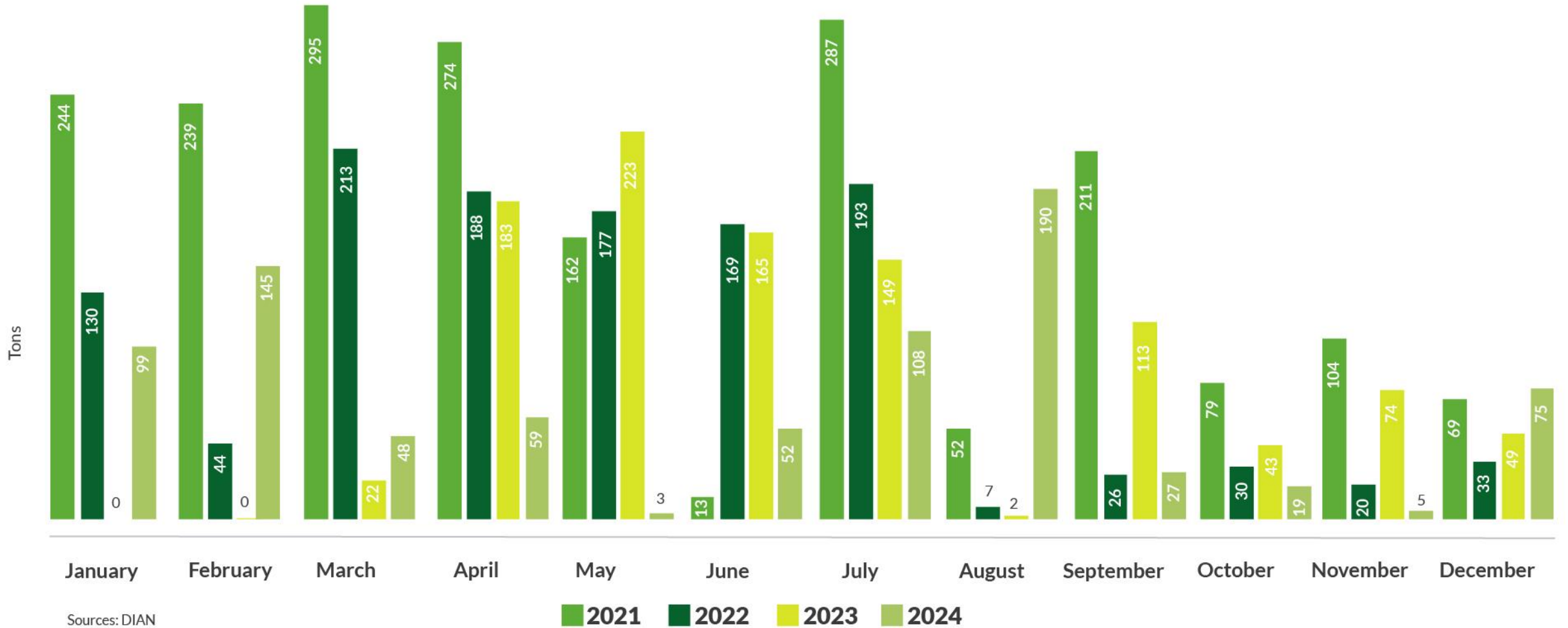
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Source: DIAN

EXPORTS TO LATAM

Tons | Month



Sources: DIAN

Main markets

CANADA



**AVOCADOS
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COLOMBIA**

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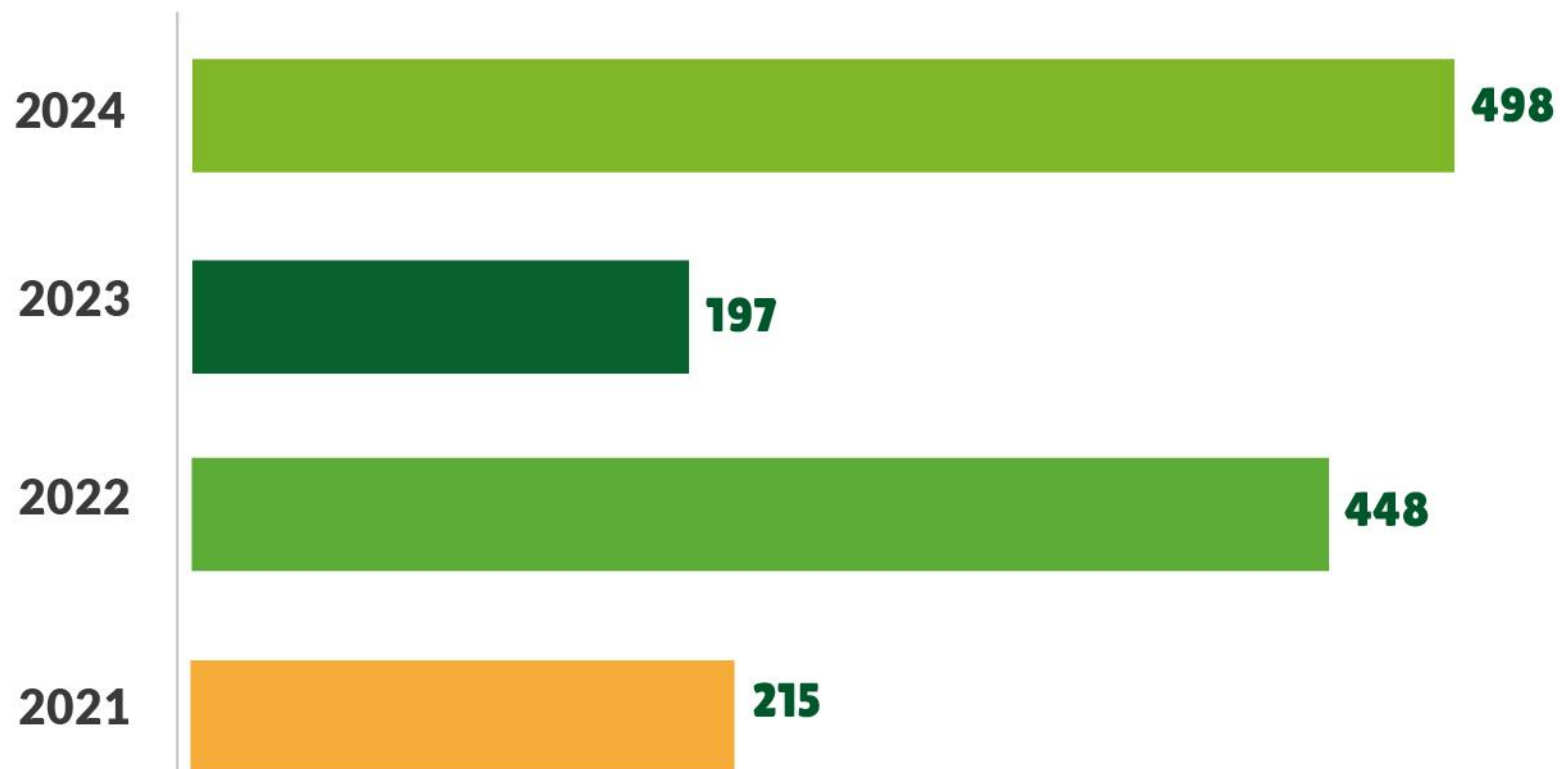
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EXPORTS TO CANADA

Tons



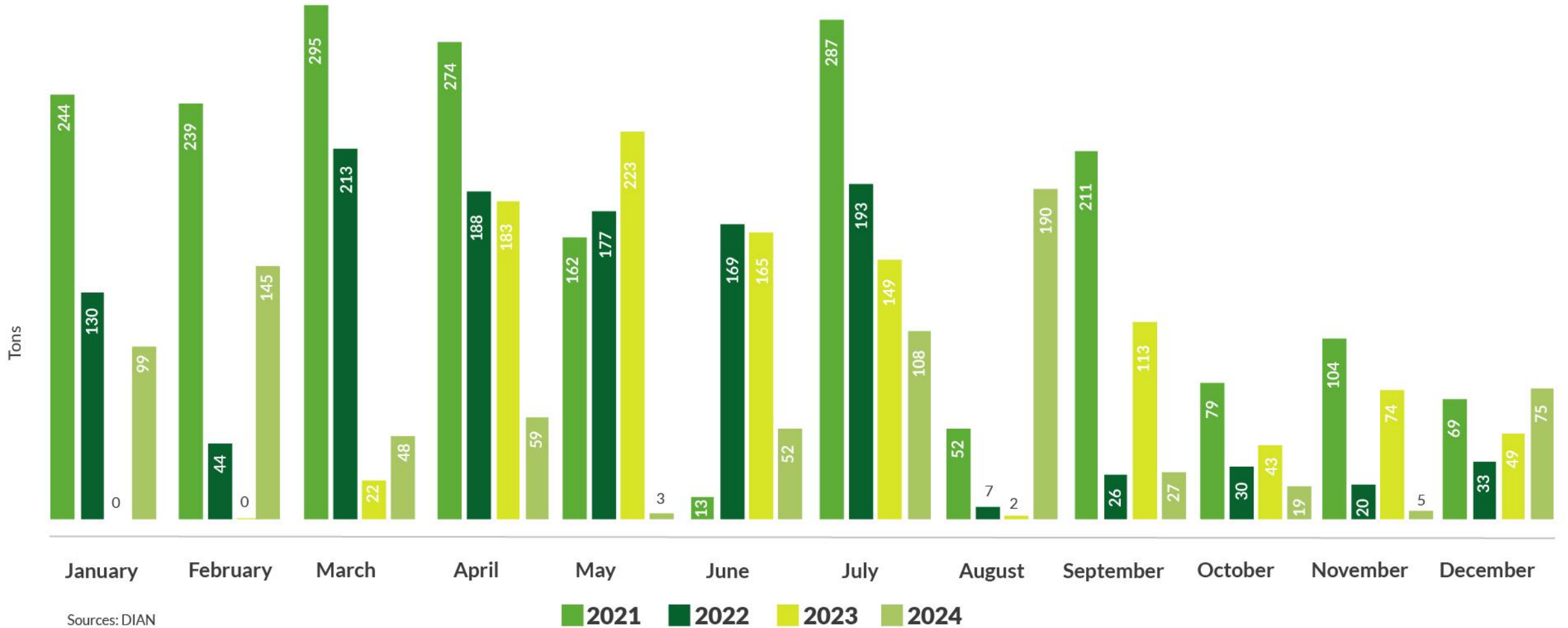
corpohass



Source: DIAN

EXPORTS TO LATAM

Tons | Month



Sources: DIAN



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