

SECTOR REPORT

Q2 | 2025



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 **2025 (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.

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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

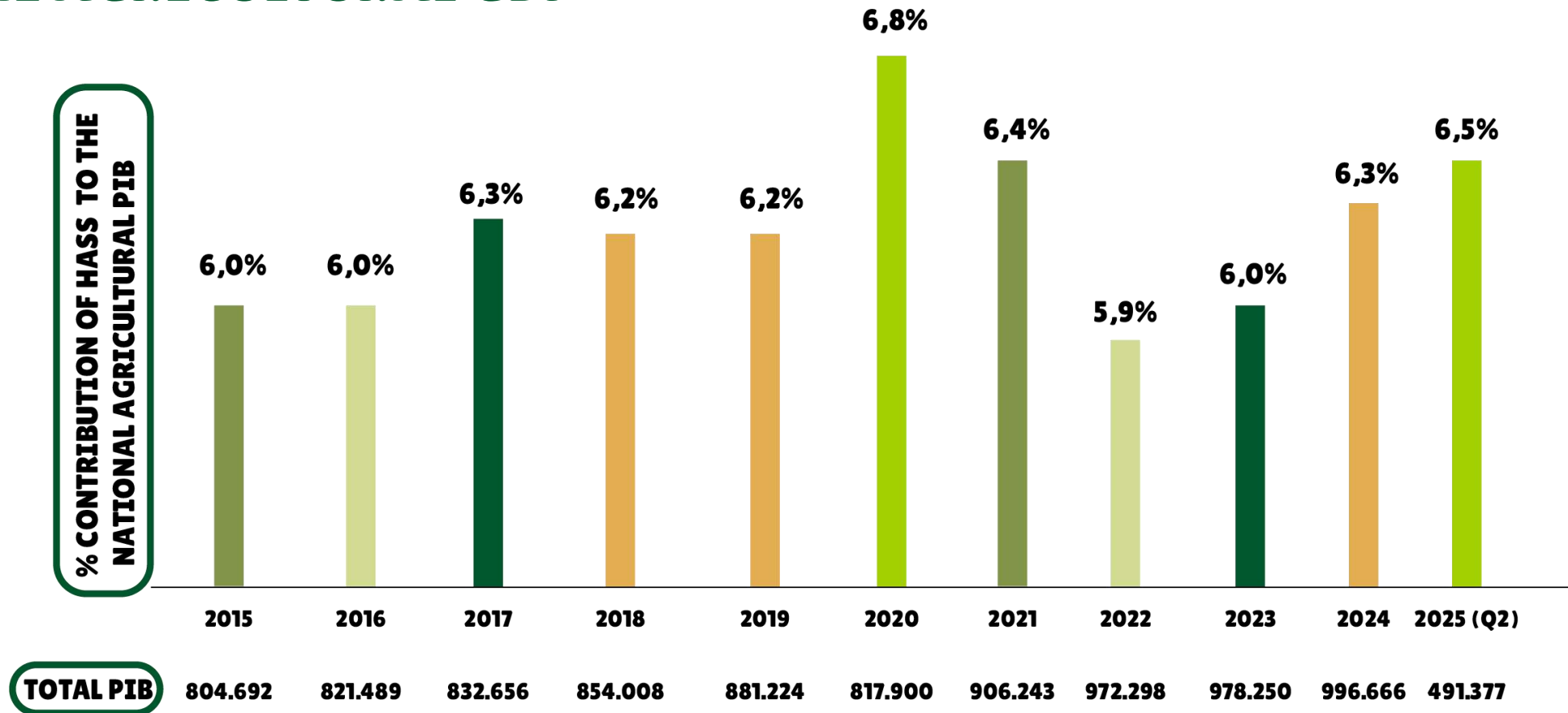


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CONTRIBUTIONS OF AGRICULTURE TO THE AGRICULTURAL GDP



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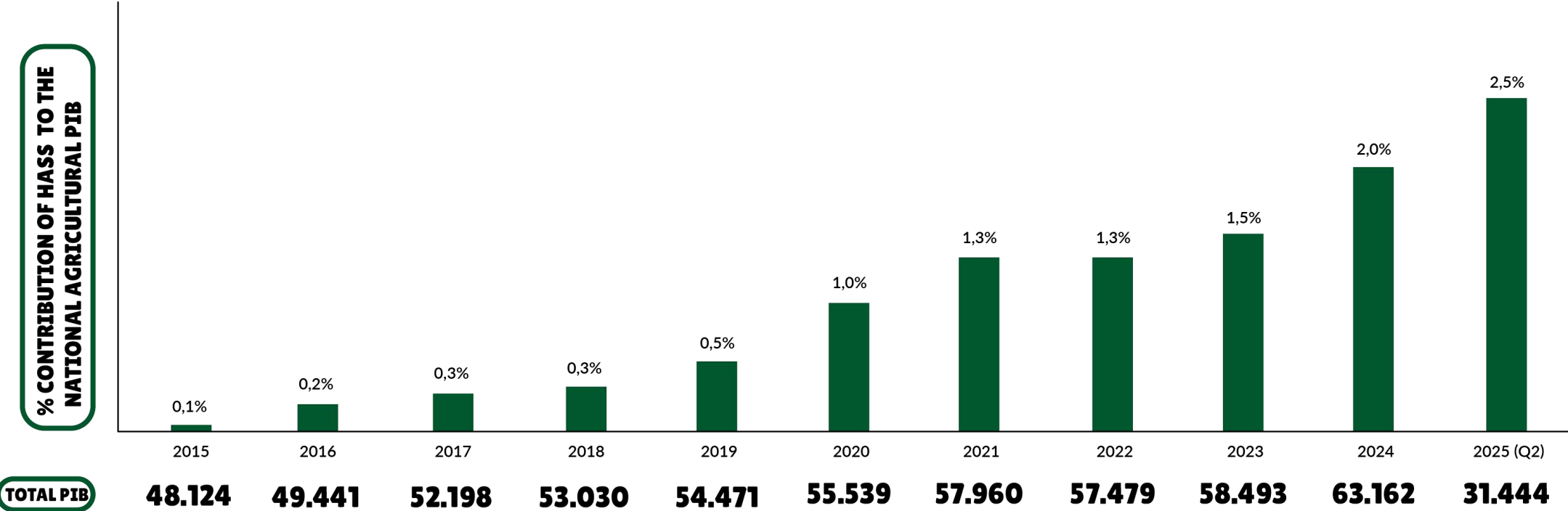
FIGURES IN BILLIONS

CONTRIBUTIONS TO THE AGRICULTURAL PIB



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Hass Avocado



FIGURES IN THOUSANDS OF BILLIONS

OPEN MARKETS

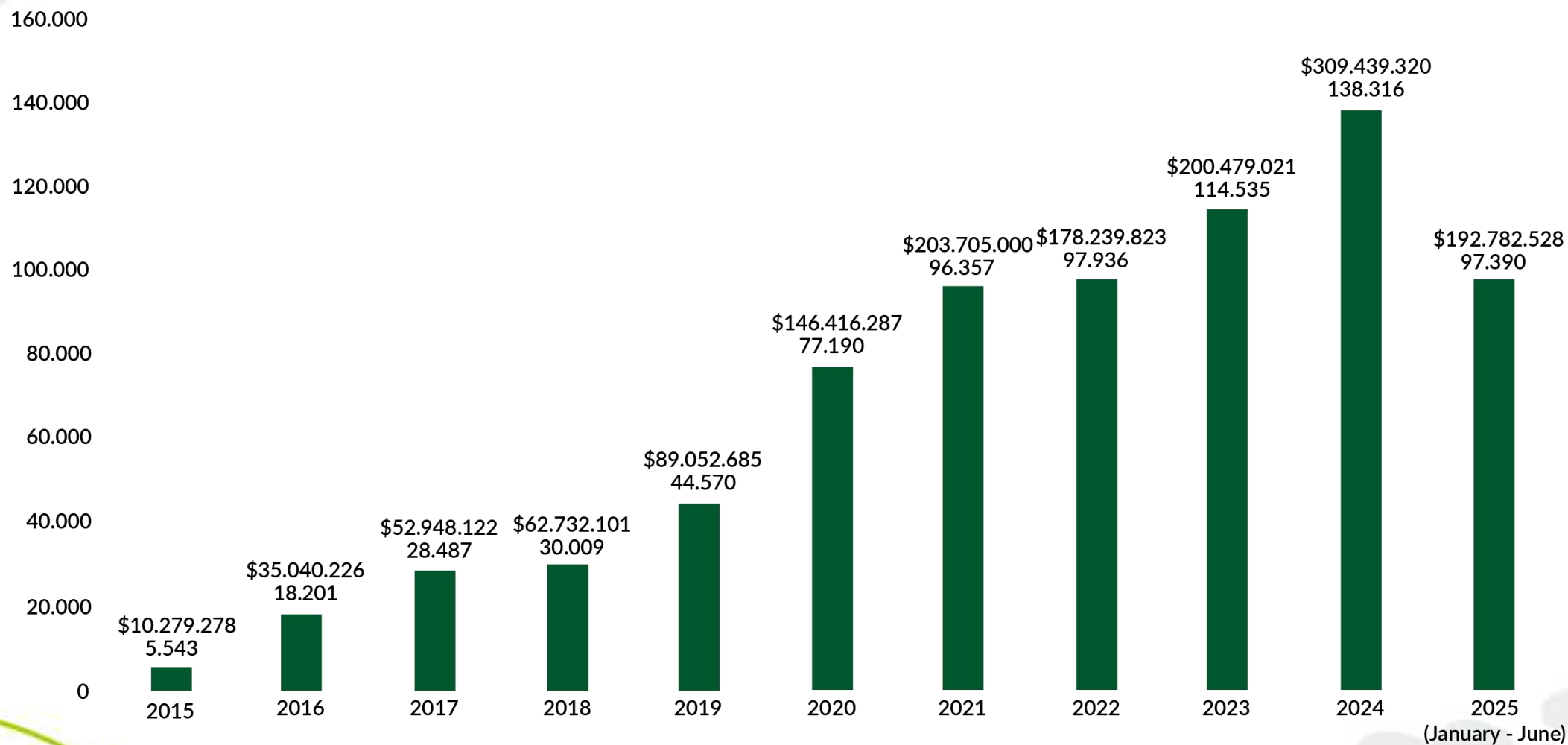
Avocados from Colombia



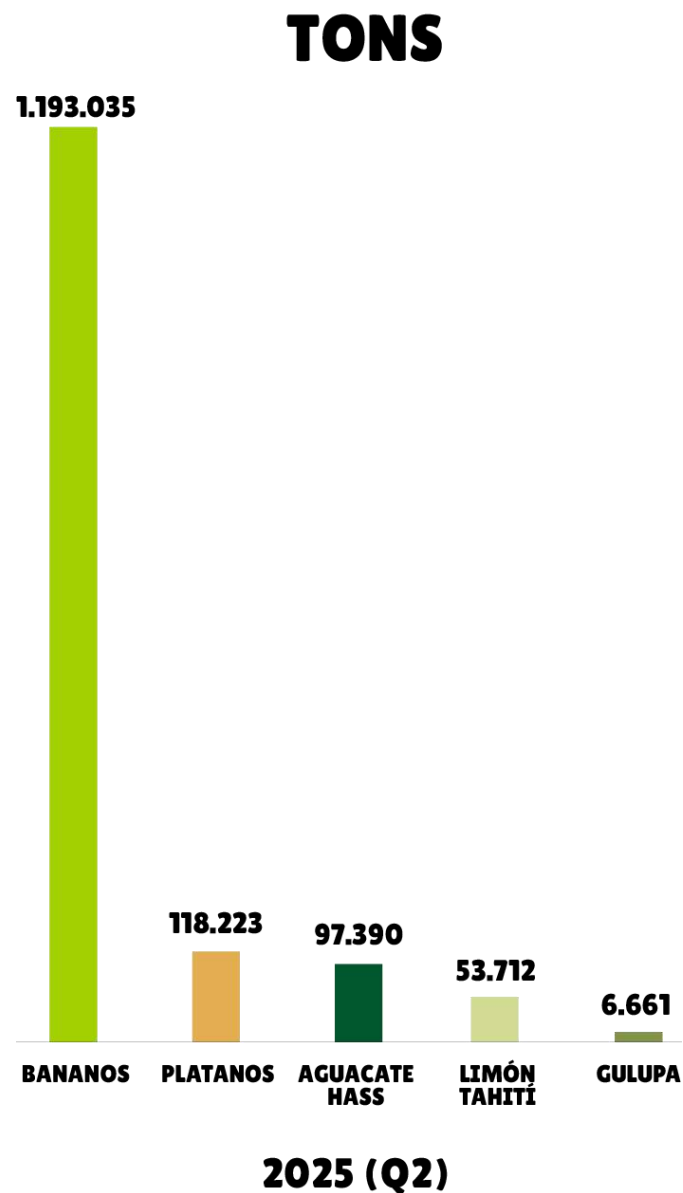
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EXPORTS IN METRIC TONS AND USD



EXPORTS OF COLOMBIAN FRUIT January - June 2025



\$192.783 USD

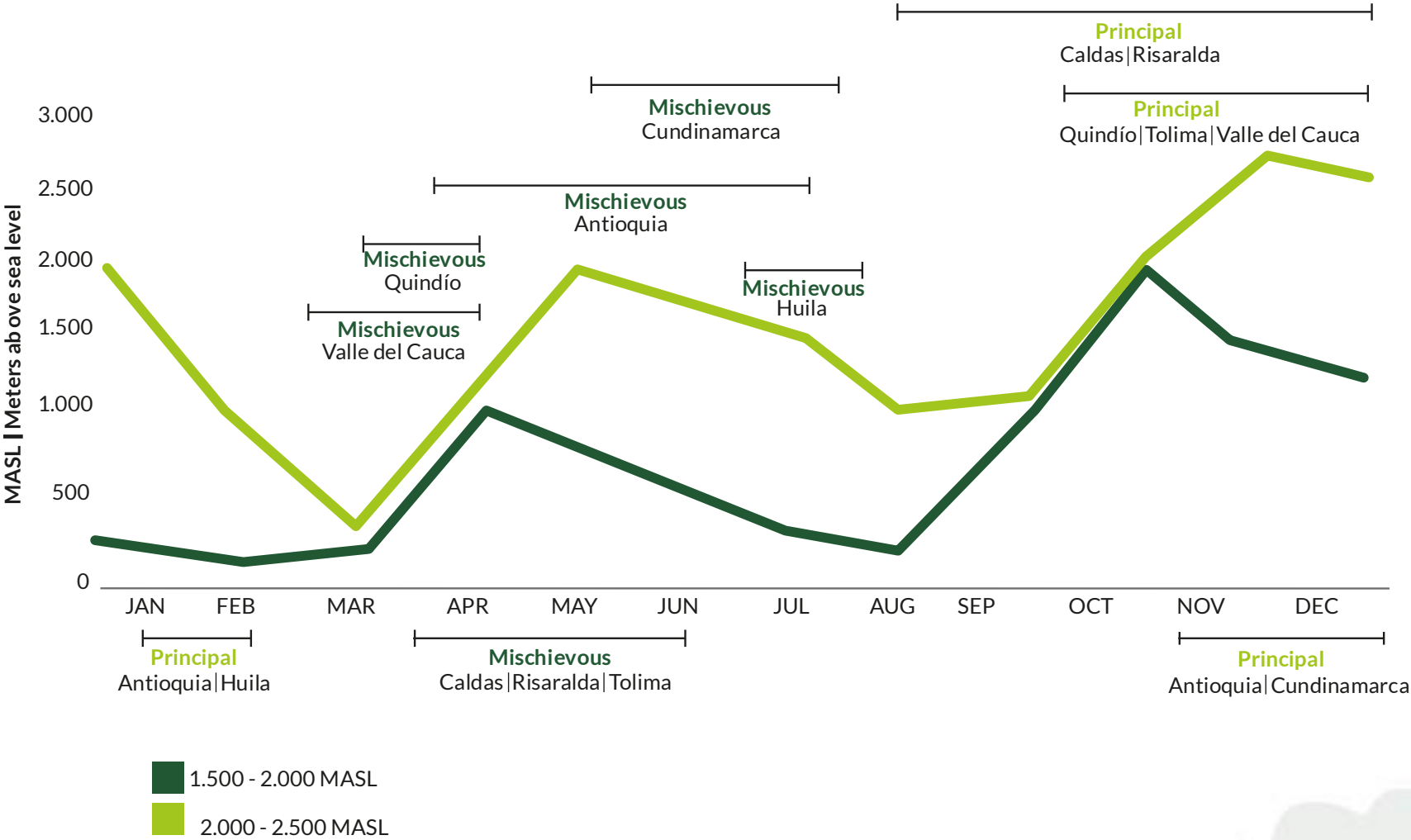
Revenue generated by
Hass Avocado
January - June 2025

HARVEST PERIODS

Avocados from Colombia



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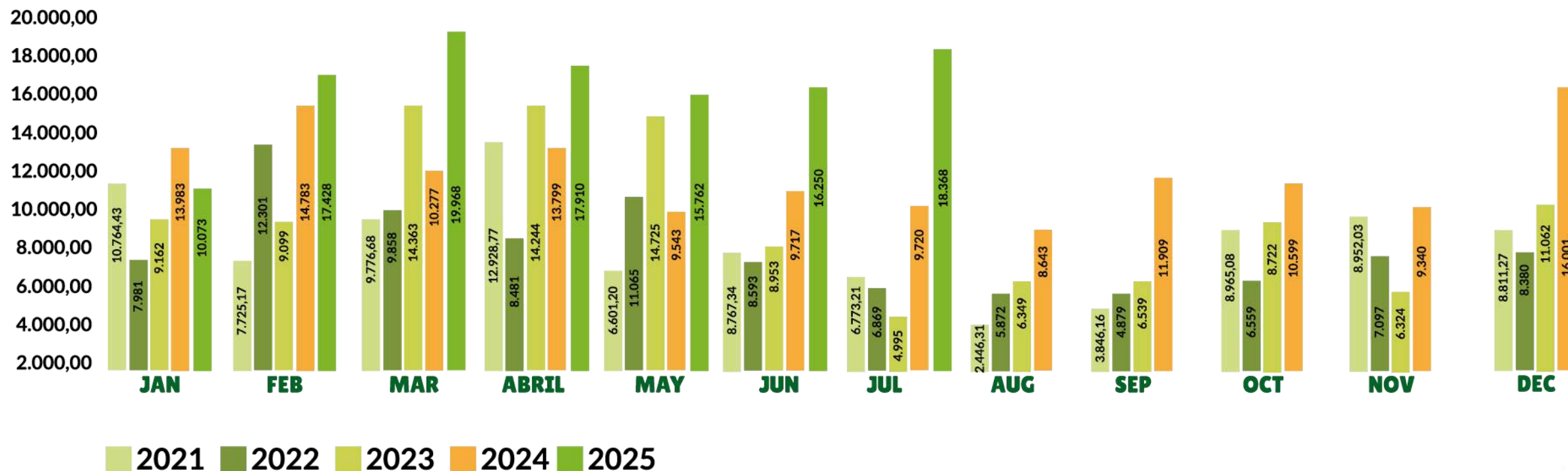


EXPORTS

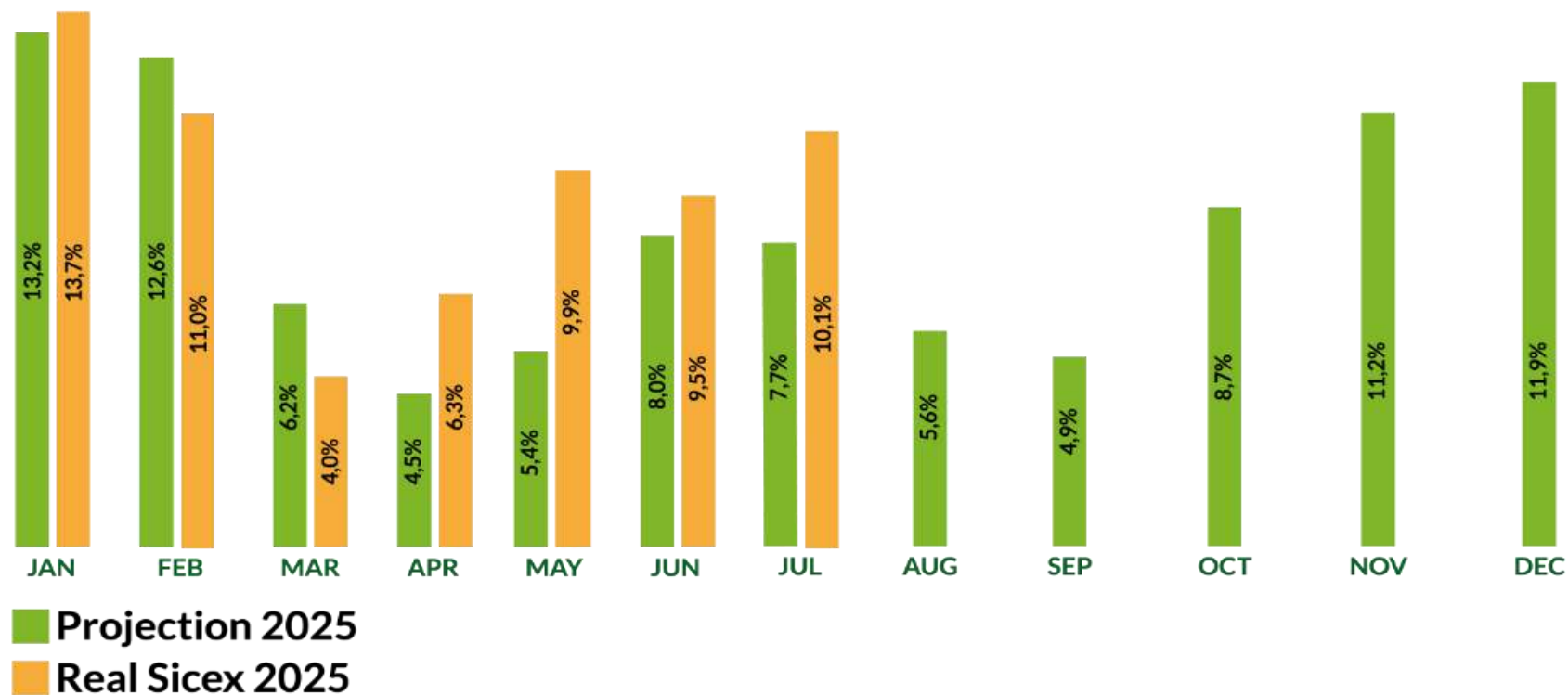
Month / Tons



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EXPORTS VS PROJECTIONS



* Compliance at 54.4% of the projection as of June

Source: SICEX

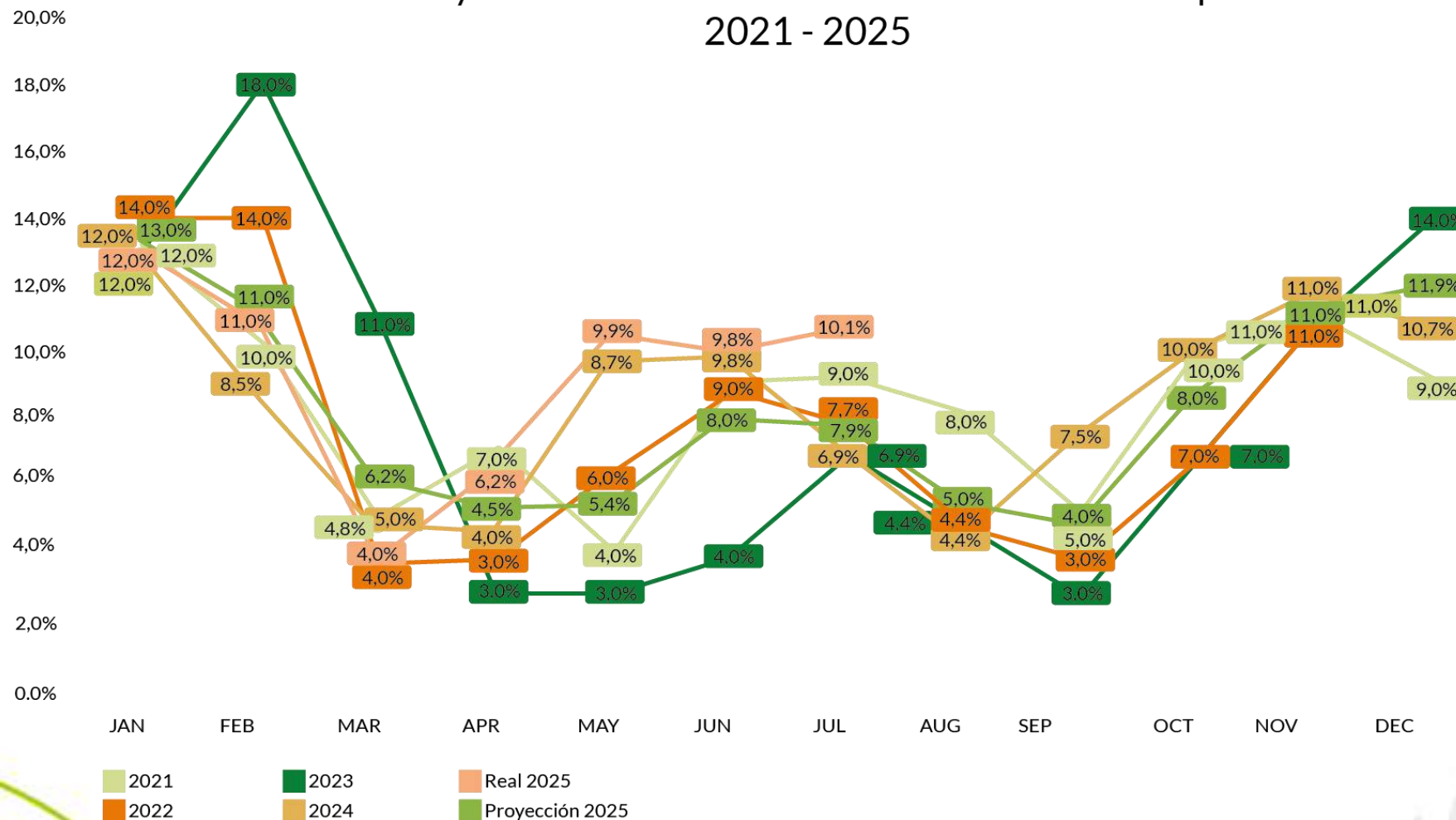
EXPORTS

Avocados from Colombia



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Monthly distribution of Colombian Hass avocado exports
2021 - 2025



Source: Corpohass

PRODUCERS



AVOCADOS
FROM
COLOMBIA

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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

WHERE IS OUR HASS AVOCADO GROW?

16.972 hectares
In **ZOMAC** territories,
41.6% of the total
hectares

Zomac: Zones
Affected by Armed
Conflict

	REGISTERED FARMS	REGISTERED AREAS
Antioquia	2.003	14.178
Caldas	454	10.489
Risaralda	269	2.497
Tolima	269	2.170
Huila	260	1.120
Valle del Cauca	203	5.729
Cauca	180	472
Nariño	146	206
Quindío	86	3.272
Cundinamarca	82	427
Putumayo	31	87
Chocó	8	19
Boyacá	6	8
Santander	5	28
Norte de Santander	5	29
Caquetá	1	33
Magdalena	1	28
Total	4.009	40.792

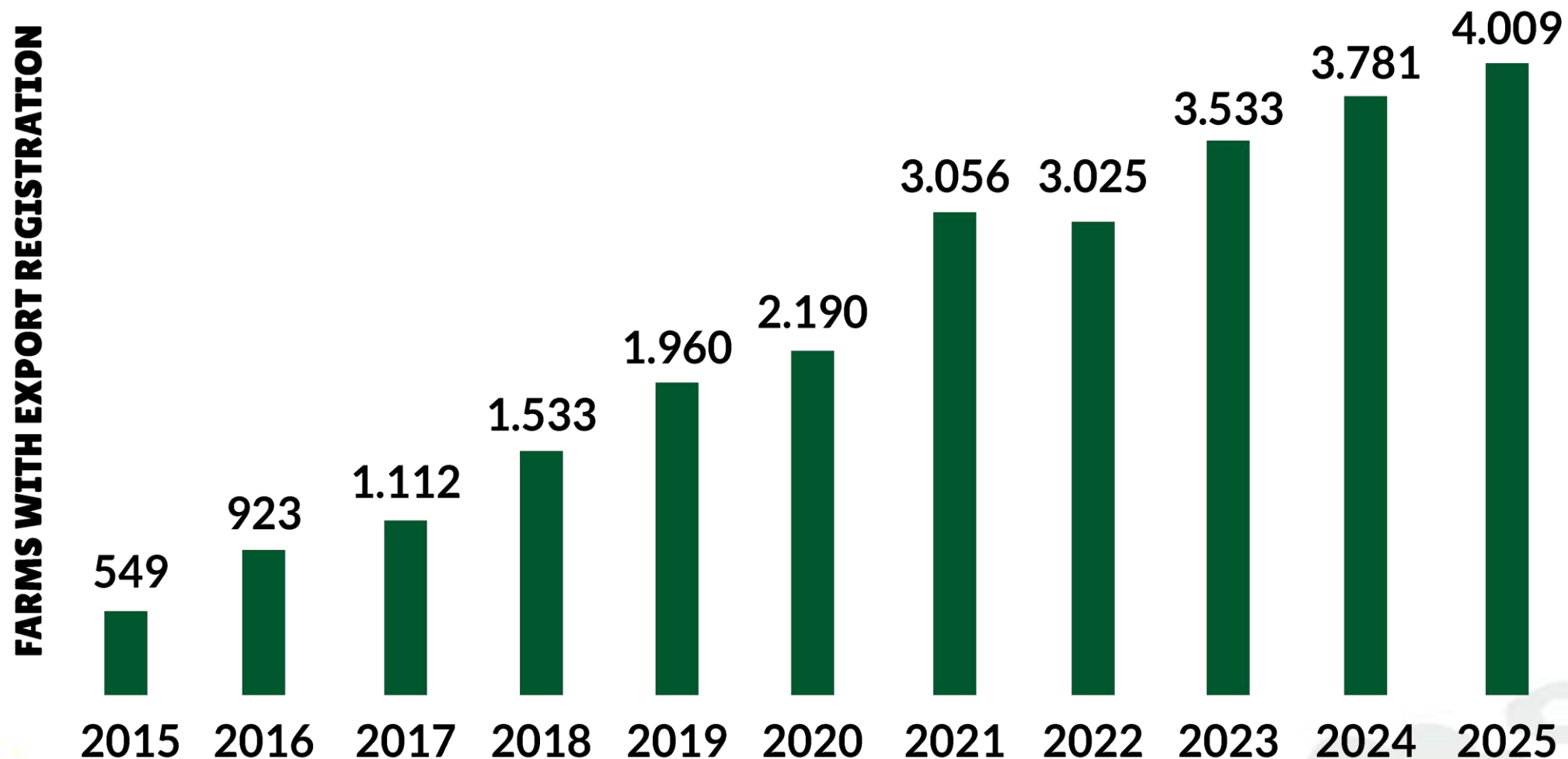


FARMS WITH EXPORT FARMS REGISTRATION

Avocados From Colombia



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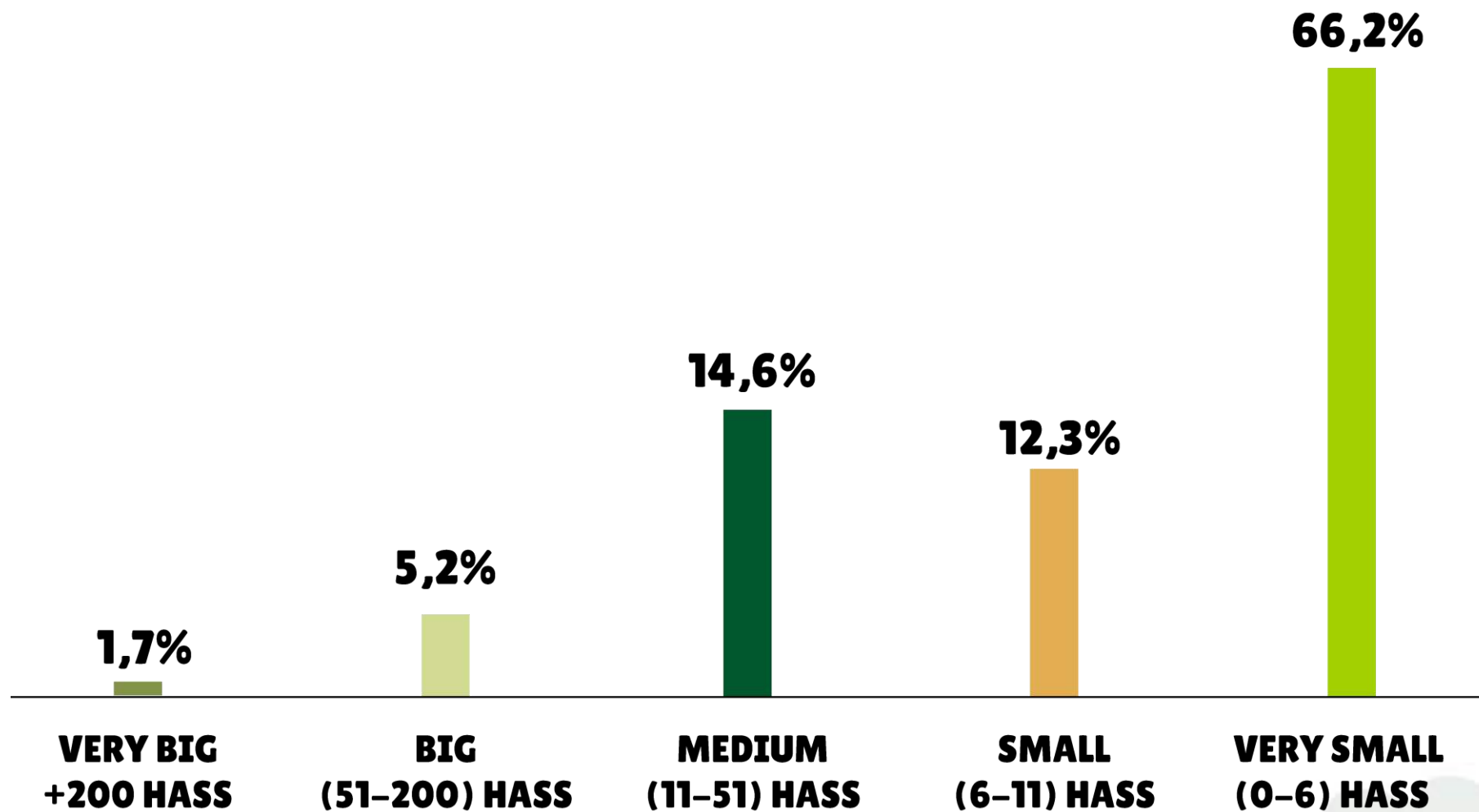


PRODUCERS

By group



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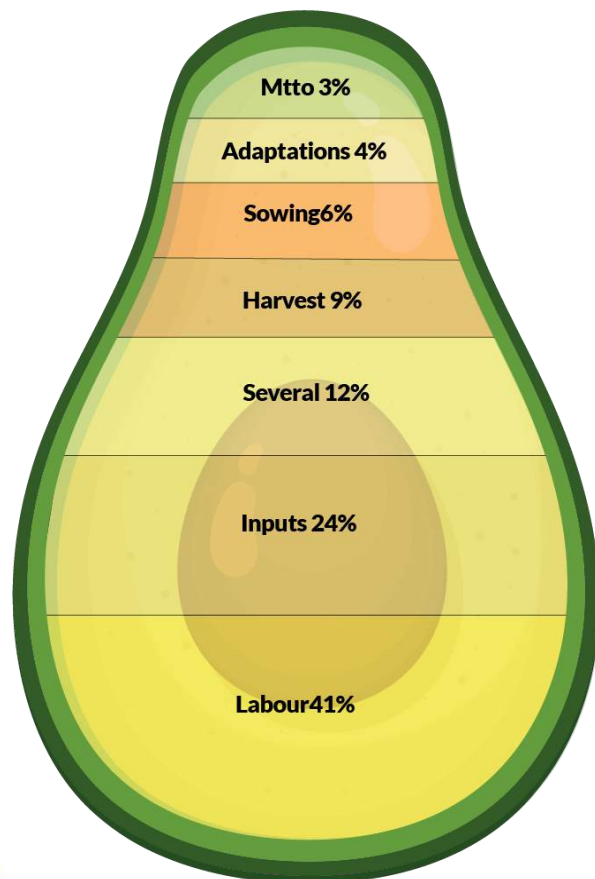
PRODUCTION COSTS

Processor: Small - Medium - Large

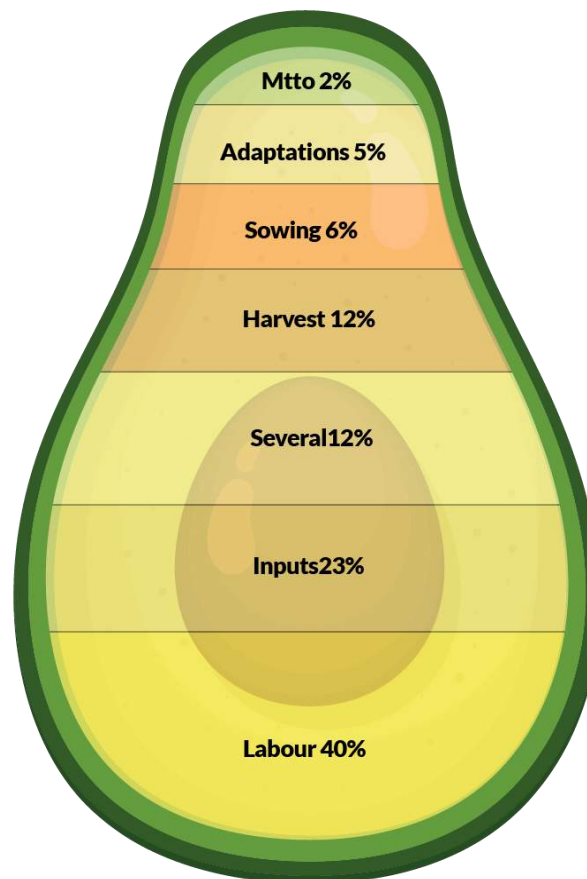


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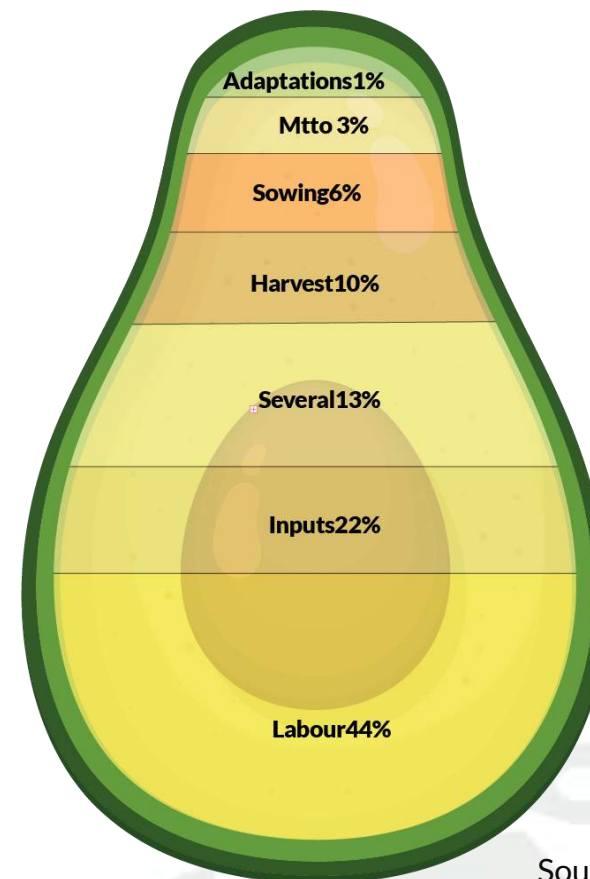
SMALL



MEDIUM



BIG

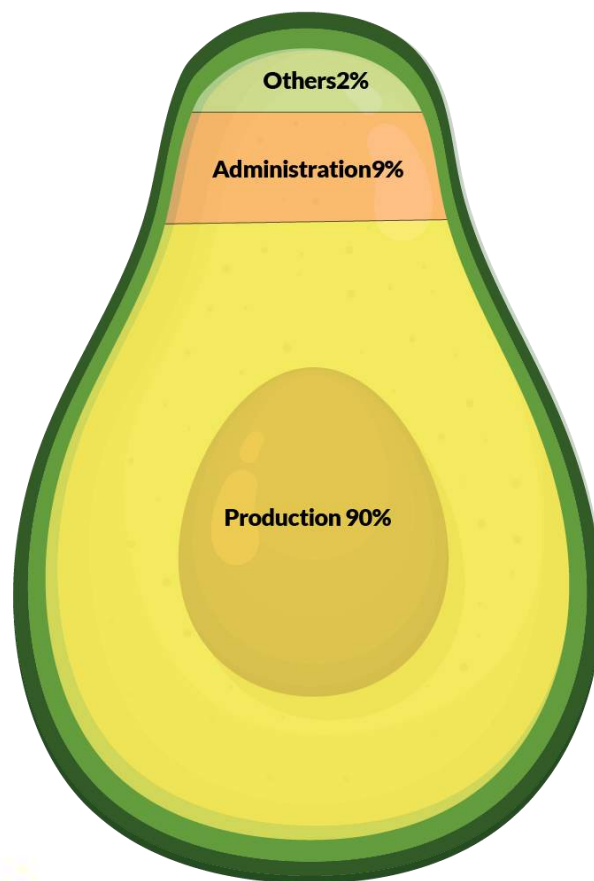


Source: Corpohass

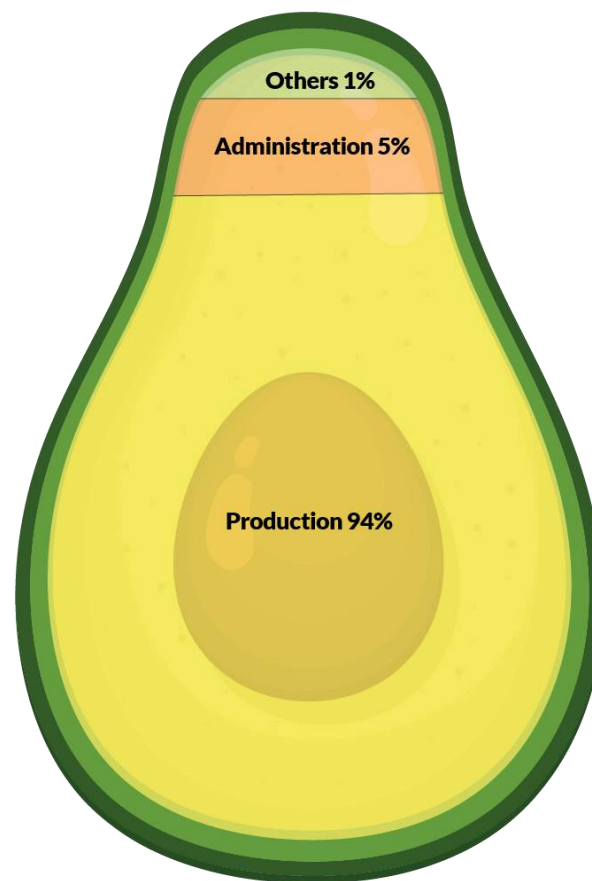
TOTAL COSTS

Processor: Small - Medium - Large

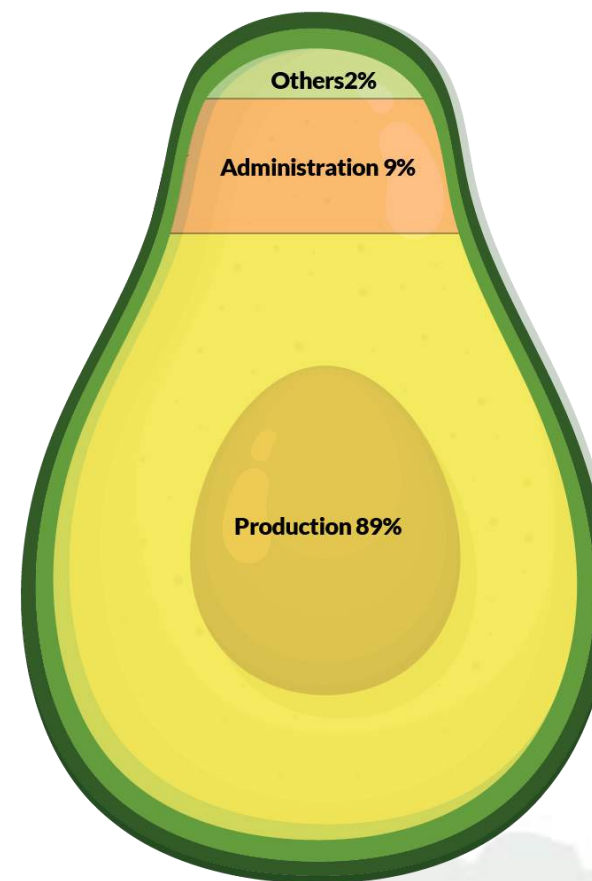
SMALL



MEDIUM



BIG



EXPORTERS



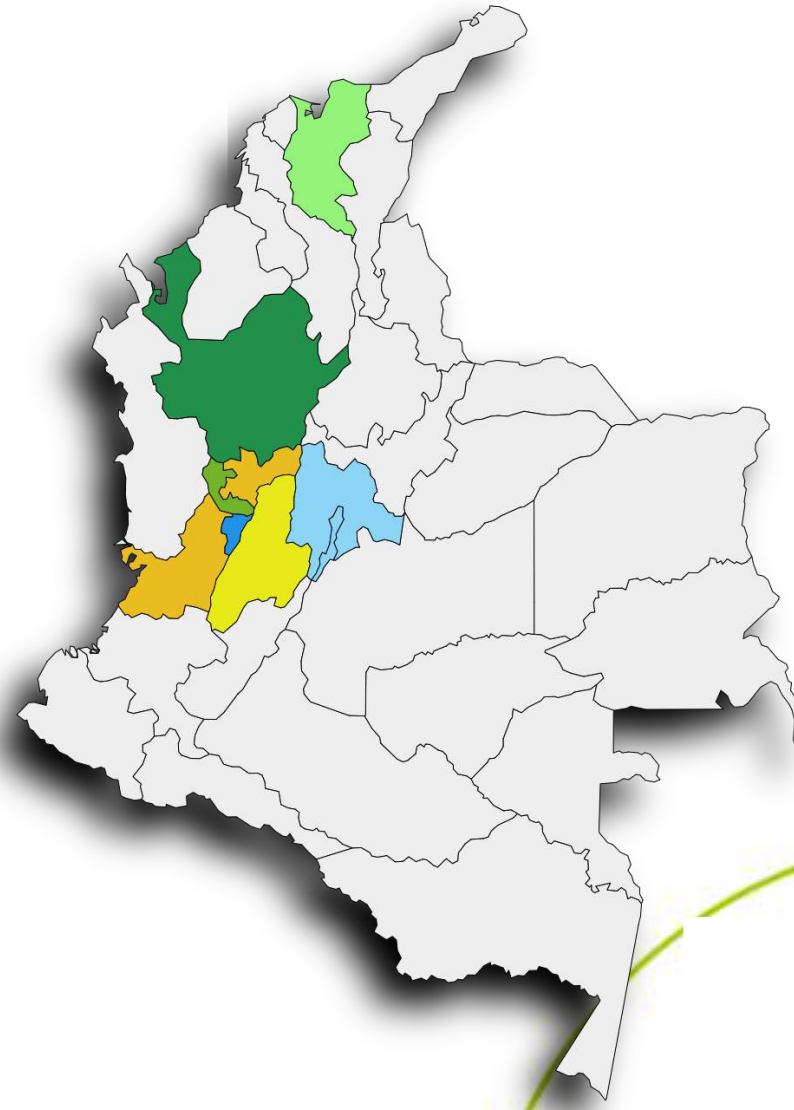
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WHERE ARE THE HASS AVOCADO PACKING PLANTS LOCATED IN COLOMBIA



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	PACKING PLANTS
Antioquia	13
Valle del Cauca	5
Risaralda	4
Caldas	2
Quindio	2
Cundinamarca	1
Magdalena	1
Tolima	1
TOTAL	29



Source: Corpohass

HASS AVOCADO PACKING CAPACITY FROM COLOMBIA

GENERAL	CONTAINERS	TONS
Monthly	1.428	32.604
Weekly	371	8.151
Annual	17.784	407.550

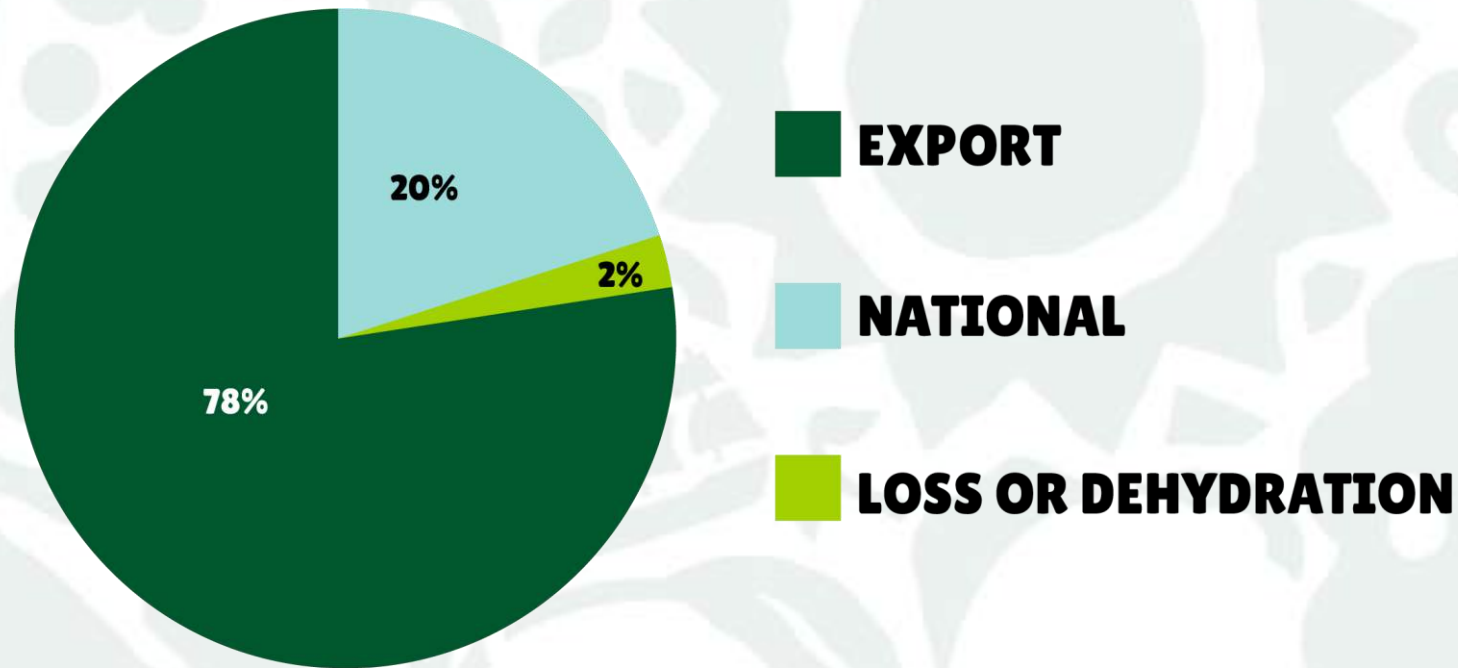
USA (Stickers PLU)	CONTAINERS	TONS
Monthly	1.142	25.124
Weekly	286	6.281
Annual	13.704	314.050



During the period from January to June 2025, 84 companies engaged in export activities.

Since 2001 to the present, 201 companies have been registered as exporters of Hass Avocado.

% DISTRIBUTION OF FRUIT PROCESSED AT THE FACILITY



Source: Corpohass

Note: It is important to clarify that these figures do not necessarily reflect the total fruit supply in Colombia, but rather the volume packed according to the demand for fruit to be exported.

Hass Avocado Export Sizes – Colombia 2025

Interim Report (Weeks 12–25 Data)

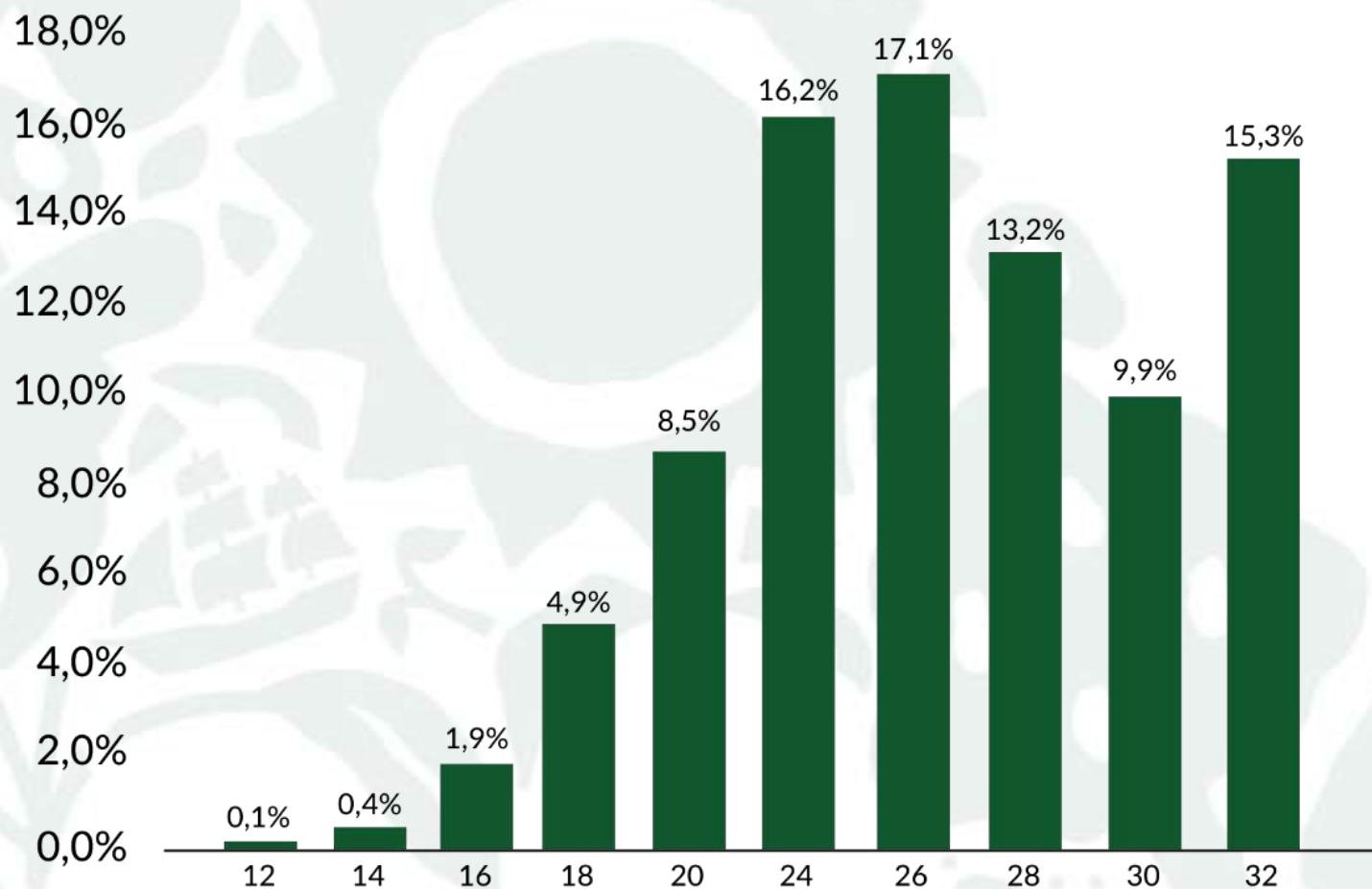


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EUROPE



corpohass



Source: Corpohass

Note: It is important to clarify that these figures do not necessarily reflect the total fruit supply in Colombia, but rather the volume packed according to the demand for fruit to be exported.

EUROPE



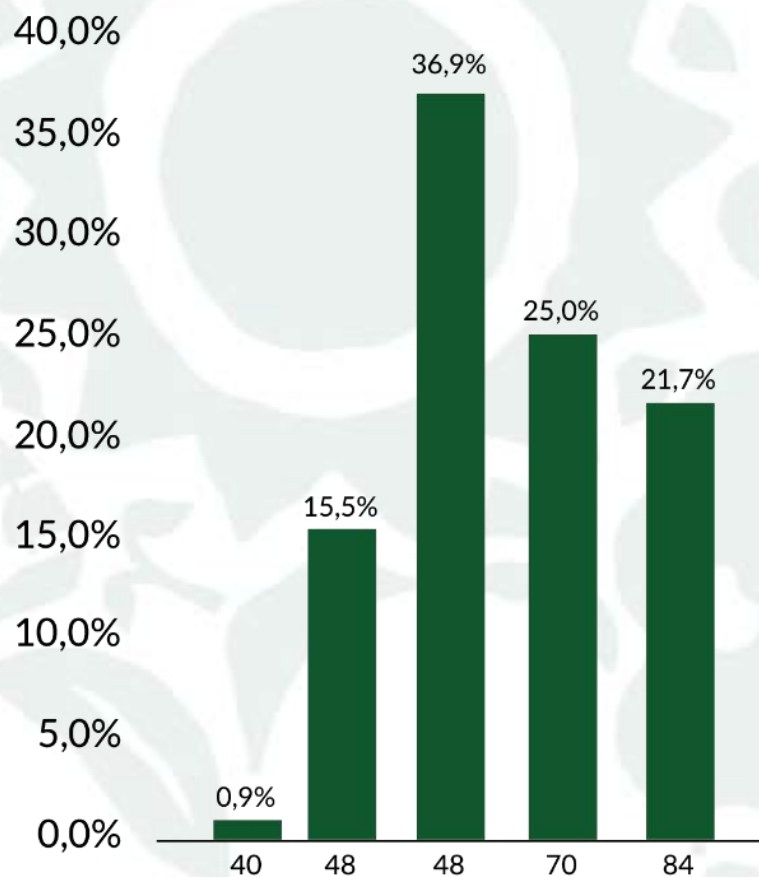
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- **Clear preference for intermediate sizes (24–30):** These account for more than **60% of the volume**, making them the most attractive for consumption in the European market.
 - **Large sizes (12–18):** Marginal share (<8%), which shows that Europe does not significantly demand large avocados from Colombia.
 - **Small sizes (32 and above):** Hold a relevant space ($\approx 15\%$), reflecting consumer interest in smaller formats.
- Consumption trend:** The distribution follows a **bell-shaped curve**, with a concentration point between sizes **24 and 30**, which represent the core of European demand for Colombian avocados. However, there is also some diversification toward smaller sizes (32), suggesting additional opportunities in specific market segments.

Source: Corpohass

Note: It is important to clarify that these figures do not necessarily reflect the total fruit supply in Colombia, but rather the volume packed according to the demand for fruit to be exported.

UNITED STATES



Source: Corpohass

Note: It is important to clarify that these figures do not necessarily reflect the total fruit supply in Colombia, but rather the volume packed according to the demand for fruit to be exported.

UNITED STATES



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- **Clear preference for intermediate sizes (48–70):** These sizes account for more than **60% of the volume** ($\approx 62\%$), making them the most demanded in this market. Size **48** stands out in particular with **36.9%**, consolidating its position as the consumption standard in the U.S
- **Small sizes (84):** Represent **21.7%** of the volume, showing that there is also a relevant space for this type of fruit, likely associated with supermarket presentations and individual consumption.
- **Large sizes (40):** Their share is **marginal (0.9%)**, confirming that this market does not favor very large sizes; instead, its preference lies in medium and small sizes.

Consumption trend: Demand in the United States is predominantly concentrated in **medium–small sizes**, reflecting a clear market preference for practical and standardized formats. Size **48** stands as the central reference for Colombian avocado consumption, consolidating its role as the commercial standard in this destination.

Source: Corpohass

Note: It is important to clarify that these figures do not necessarily reflect the total fruit supply in Colombia, but rather the volume packed according to the demand for fruit to be exported.

PROCESSOR



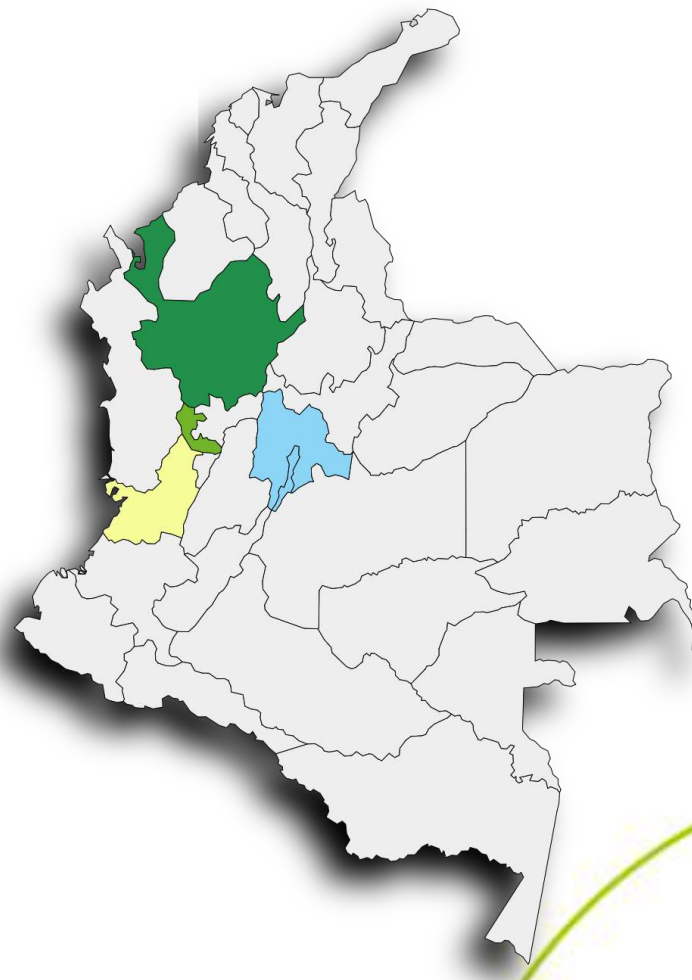
AVOCADOS
FROM
COLOMBIA

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WHERE ARE THE HASS AVOCADO PROCESSORS PLANTS LOCATED IN COLOMBIA

REGION	PROCESSOR
Risaralda	4
Antioquia	5
Valle del Cauca	2
Cundinamarca	2
TOTAL	13



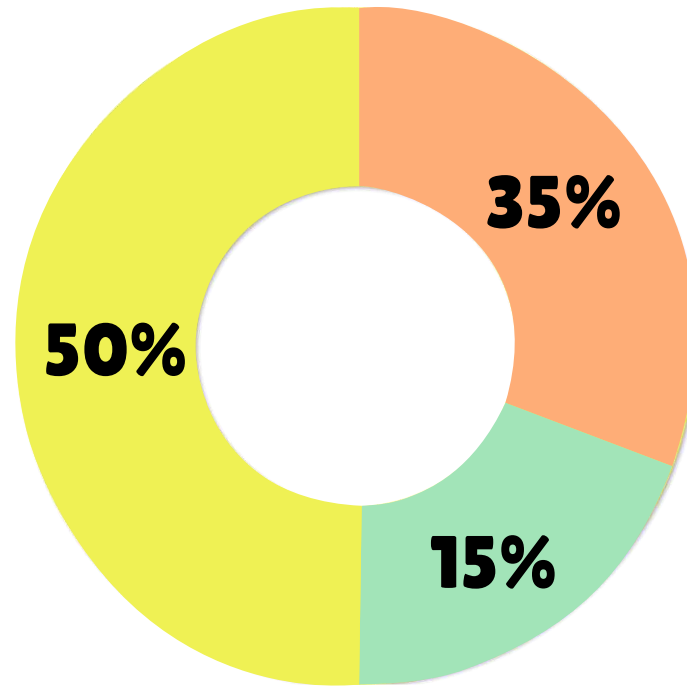
PROCESSORS

According to group



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PROCESSOR
Big 60%
Small 40%



- **35% OIL PRODUCTION**
- **50% PULPS AND GUACAMOLES**
- **15% FROZEN**

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










Important Note

It is a corequisite to have the Exporter Plot Registration in order to carry out the process.

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)

These are production sites whose buffer zone characterization (including crops and backyard áreas) was carried out by the producer or individual and approved by the plant health authority, thus forming a productive nucleus.

	 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)

POT	# Farms	Hectares
Estados Unidos	620	16.275,67
Argentina	268	9.326,12
Perú	164	7.118,78
Japón	81	4.426,66
Corea	60	3.109,48
Chile	9	1.190,20



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

[**CLICK TO SEE THE STEPS**](#)

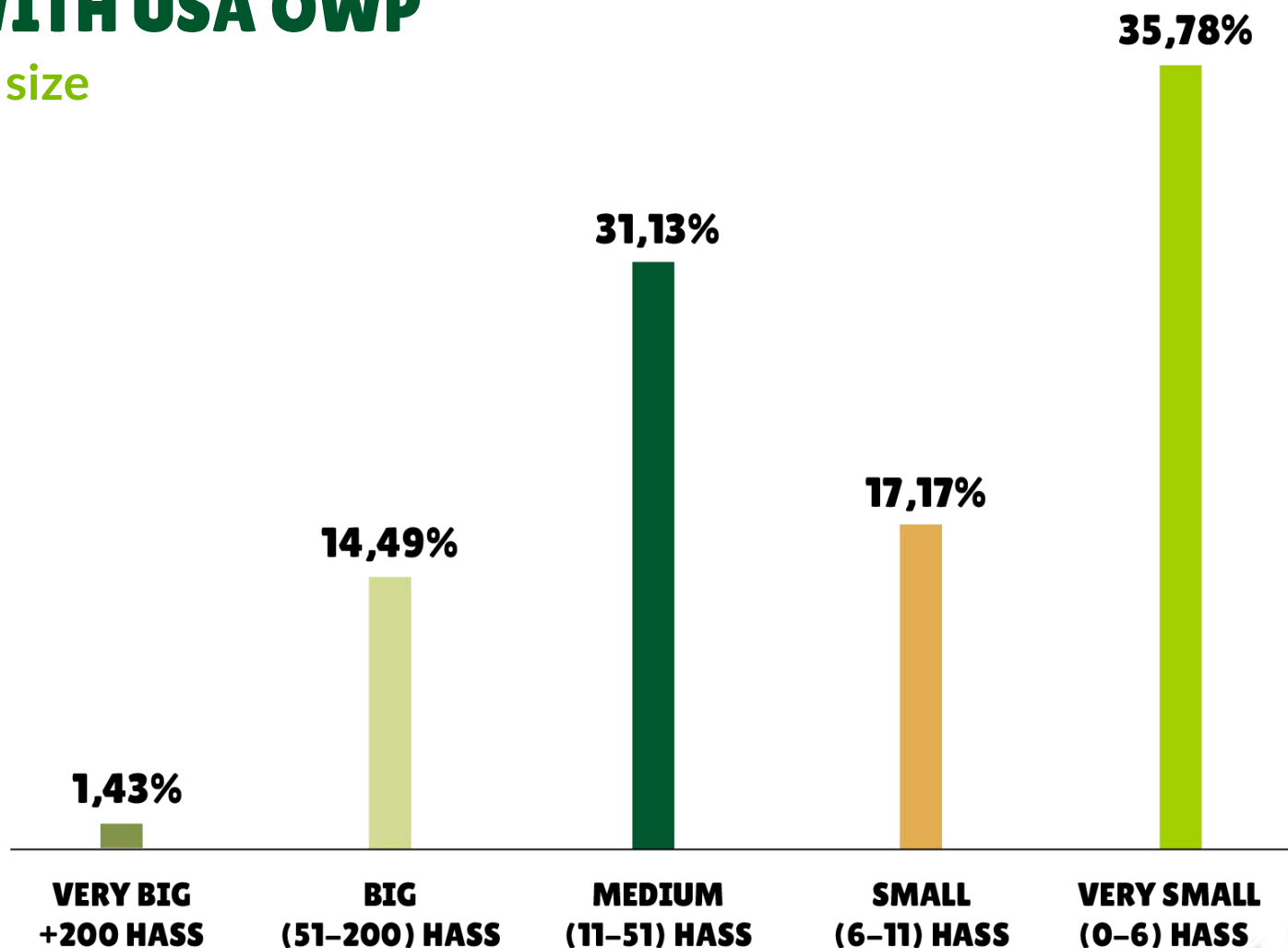
FARMS WITH USA OWI

	FARMS	HECTARES
Antioquia	420	6.124,3838
Caldas	86	5.303,765
Valle del Cauca	23	2.065,765
Quindio	19	1.282,68
Risaralda	38	959,77
Tolima	11	357,71
Huila	20	130,31
Cundinamarca	1	48,9
Cauca	2	3
Total	620	16.275,67



FARMS WITH USA OWP

According to size



FARMS WITH USA OWP –Antioquia

MUNICIPALITIES	FARMS	HECTARES
Urrao	145	2042,9732
Abejorral	69	1082,62
Jerico	19	820,18
Sonsón	85	780,67
San Vicente	26	232,736
Santa Rosa de Osos	2	177,6
El Retiro	12	155,34
El Peñol	12	122,987
Jardín	11	109,6
Támesis	2	86,856
Concordia	1	84,56
La Unión	4	82,0296
Marinilla	8	57,63
La Ceja	8	54,29
Caicedo	4	49,486
Yarumal	1	38,736
San Pedro	3	36,3
Salgar	1	31,3
Andes	1	23,46
Pueblorrico	1	17,2
Titiribí	1	12,92
Pueblorrico	1	17,2
Anzá	1	10
Entrerrios	1	9,41
Granada	1	5,5
Sopetran	1	
Total	420	6124,3838

FARMS WITH USA OWP –Caldas

MUNICIPALITIES	FARMS	HECTARES
Aguadas	30	1.411,26
Aranzazu	9	1.226,94
Salamina	14	1.066,49
Pácora	18	752,30
Villamaria	4	212,69
Neira	1	207,09
Anserma	4	187,35
Riosucio	4	149,00
Manizales	2	90,65
Total	86	5.303,77

FARMS WITH USA OWP –Cundinamarca

MUNICIPALITIES	FARMS	HECTARES
San Francisco	1	48,90
Total	1	48,90

FARMS WITH USA OWP –Huila

MUNICIPALITIES	FARMS	HECTARES
Isnos	8	60,70
San Agustin	3	27,00
La Argentina	3	21,20
Pitalito	1	10,00
Oporapa	2	7,00
La Plata	1	2,46
Pital	2	1,95
Total	20	130,31

FARMS WITH USA OWP –Quindío

MUNICIPALITIES	FARMS	HECTARES
Pijao	7	518,20
Calarca	4	333,80
Salento	5	231,68
Circasia	1	99,00
Genova	1	90,00
Buenavista	1	10,00
Total	19	1.282,68

FARMS WITH USA OWP –Risaralda

MUNICIPALITIES	FARMS	HECTARES
Guática	25	656,83
Santuario	1	129,83
Quinchia	5	89,60
Apia	5	66,02
Dosquebradas	2	18,00
Total	38	959,77

FARMS WITH USA OWP –Tolima

MUNICIPALITIES	FARMS	HECTARES
Villahermosa	1	180,00
Herveo	8	85,16
Cajamarca	1	73,00
Anzoategui	1	19,55
Total	11	357,71

FARMS WITH USA OWP – Valle del Cauca

MUNICIPALITIES	FARMS	HECTARES
Bolivar	9	834,49
Toro	1	300,00
Caicedonia	3	291,50
Trujillo	1	245,00
Versalles	3	169,51
Sevilla	2	156,65
El Dovio	3	63,00
El Cerrito	1	5,00
Total	23	2.065,15

FARMS WITH USA OWP – Cauca

MUNICIPALITIES	FARMS	HECTARES
El Tambo	1	3,00
Purace	1	3,00
Total	2	3,00

DO YOU WANT MORE INFORMATION?

CLICK TO VIEW THE FARMS

FARMS





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.

[CLICK HERE](#)

FARMS WITH CHILE OWP

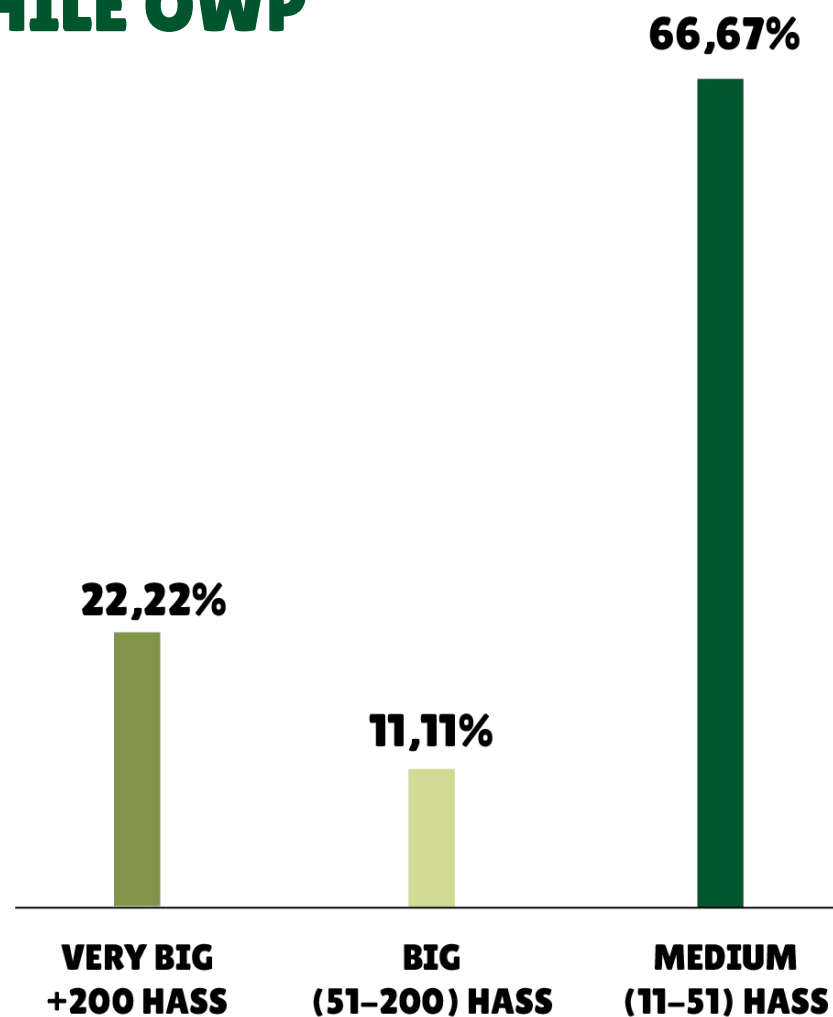
According to size

	FARMS	HECTARES
Caldas	7	750,00
Quindío	1	420,00
Risaralda	1	20,20
Total	9	1.190,20



FARMS WITH CHILE OWP

According to size



FARMS WITH POT Chile –Caldas

MUNICIPALITIES	FARMS	HECTARES
Aranzazu	1	403,00
Aguadas	5	195,52
Salamina	1	151,48
Total	7	750,00

FARMS WITH POT Chile –Risaralda

MUNICIPALITIES	FARMS	HECTARES
Guática	1	20,20
Total	1	20,20

FARMS WITH POT Chile –Quindío

MUNICIPALITIES	FARMS	HECTARES
Pijao	1	420,00
Total	1	420,00

DO YOU WANT MORE INFORMATION?

CLICK TO VIEW THE FARMS

[CLICK HERE](#)





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.

[**CLIC PARA CONSULTAR LOS PASOS**](#)

FARMS WITH CHILE OWP

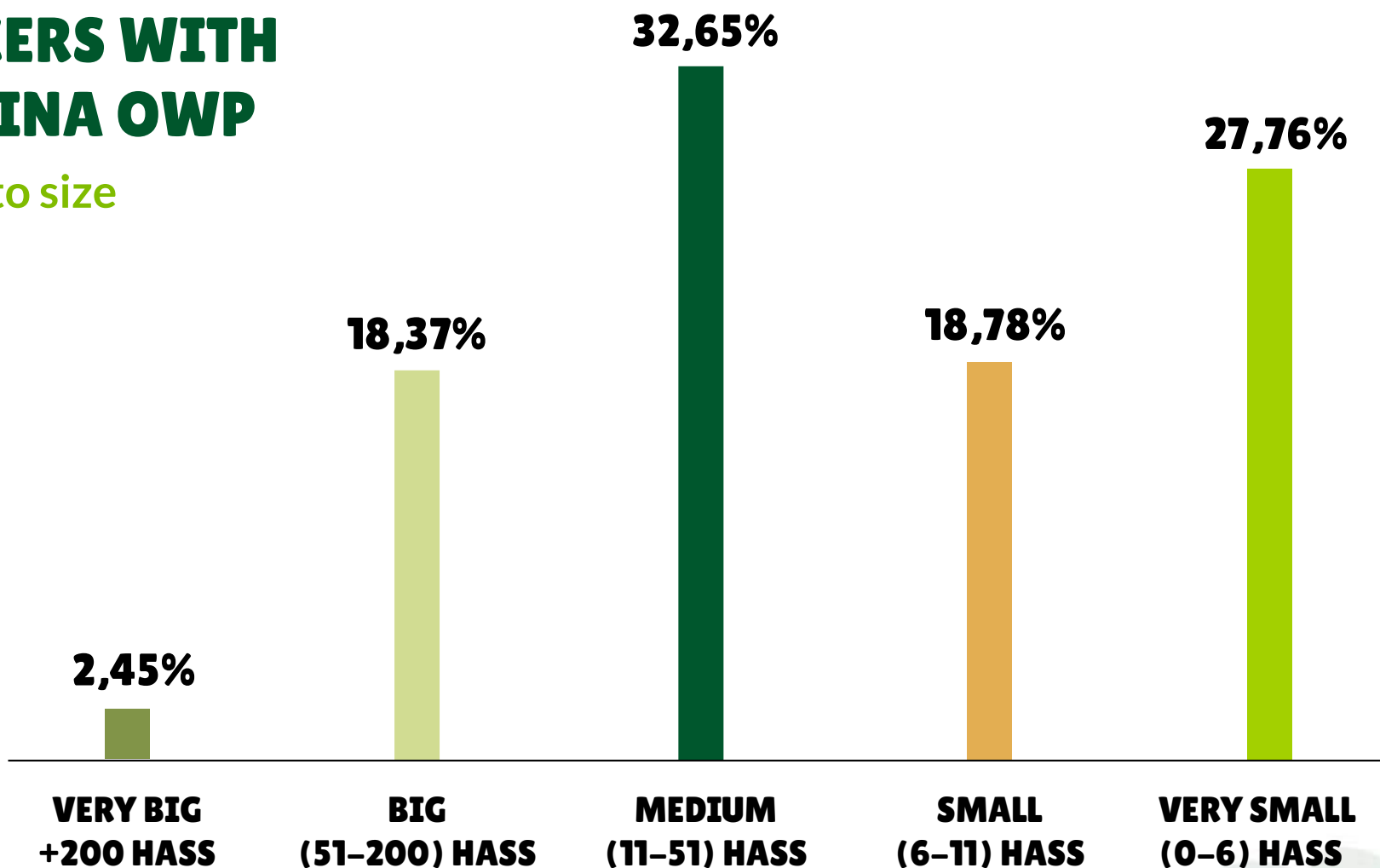


	FARMS	HECTARES
Antioquia	187	3.846,545
Caldas	50	3.846,545
Valle del Cauca	7	949,64
Quindio	9	1.131,89
Risaralda	5	194,5
Tolima	8	89,81
Cauca	2	10,5
Total	68	9.326,1177



PRODUCERS WITH ARGENTINA OWP

According to size



FARMS WITH POT Argentina –Antioquia



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MUNICIPALITIES	FARMS	HECTARES
Urrao	56	1.055,74
Abejorral	29	650,42
Jerico	5	193,25
Sonsón	26	145,61
San Vicente	17	140,47
Santa Rosa de Osos	1	75,60
El Peñol	10	117,61
Jardín	5	75,96
Támesis	4	314,66
La Unión	4	25,38
Marinilla	5	38,94
La Ceja	5	51,33
Caicedo	5	49,49
San Pedro	3	36,30
Salgar	1	31,30
Andes	1	23,46
Anzá	1	10,00
Entrerrios	1	9,41
Granada	1	5,50
Sopetran	2	
Rionegro	3	25,31
Copacabana	1	16,50
Guarne	1	10
Total	187	3.103,23

FARMS WITH POT Argentina –Caldas

MUNICIPALITIES	FARMS	HECTARES
Aguadas	18	1.174,77
Aranzazu	5	933,82
Salamina	8	596,37
Pácora	10	479,11
Villamaria	3	195,19
Neira	1	207,09
Anserma	3	169,55
Manizales	2	90,65
Total	50	3.846,55

FARMS WITH POT Argentina –Quindío

MUNICIPALITIES	FARMS	HECTARES
Pijao	4	439,60
Genova	1	276,15
Calarca	2	234,80
Salento	1	158,04
Filandia	1	23,30
Total	9	1.131,89

FARMS WITH POT Argentina –Risaralda

MUNICIPALITIES	FARMS	HECTARES
Guática	4	146,90
Quinchia	1	47,60
Total	5	194,50

FARMS WITH POT Argentina –Tolima

MUNICIPALITIES	FARMS	HECTARES
Herveo	8	89,81
Total	8	89,81

FARMS WITH POT Argentina –Valle del Cauca

MUNICIPALITIES	FARMS	HECTARES
Bolivar	4	625,99
Caicedonia	1	153,00
Sevilla	1	142,25
Roldanillo	1	28,40
Total	7	949,64

FARMS WITH POT Argentina –Cauca

MUNICIPALITIES	FARMS	HECTARES
El Tambo	2	10,50
Total	2	10,50

DO YOU WANT MORE INFORMATION?

CLICK TO VIEW THE FARMS

CLICK HERE





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.

[CLICK HERE](#)



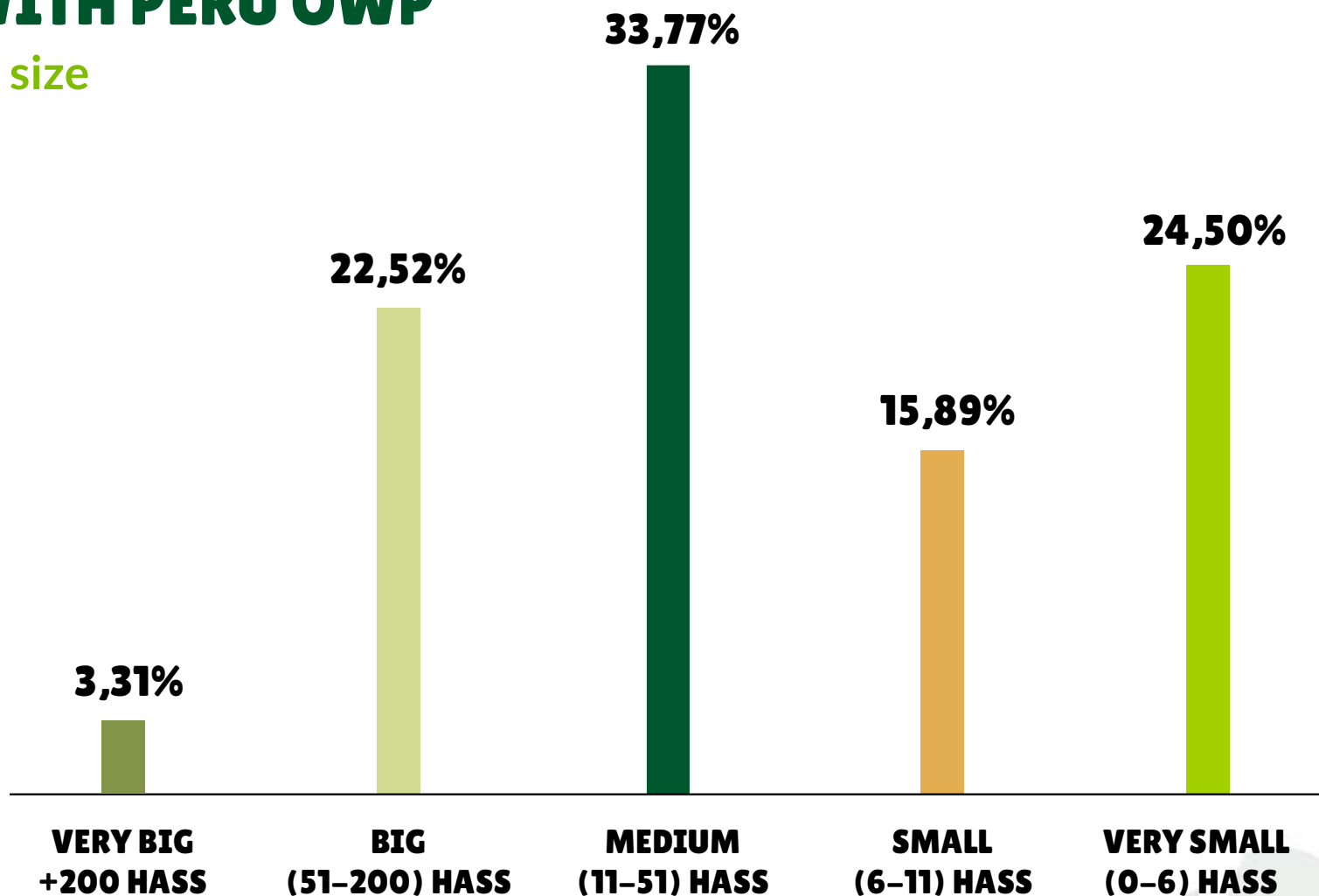
FARMS WITH PERU OWP

	FARMS	HECTARES
Antioquia	109	2.180,99
Caldas	42	3.286,31
Quindio	4	611,04
Risaralda	3	141,70
Tolima	1	2,50
Total	164	7.118,78



FARMS WITH PERU OWP

According to size



FARMS WITH POT Perú –Antioquia

MUNICIPALITIES	FARMS	HECTARES
Urrao	41	839,19
Abejorral	13	285,61
Jerico	4	187,75
Sonsón	23	265,39
San Vicente	2	9,00
Santa Rosa de Osos	1	75,60
Jardín	5	64,44
Támesis	3	230,36
La Unión	2	9,48
Marinilla	1	16,33
La Ceja	1	
Caicedo	4	49,49
Andes	1	23,46
Anzá	1	10,00
Granada	1	5,50
Rionegro	1	7,30
Copacabana	1	16,50
El Peñol	4	85,60
Total	109	2.180,99

FARMS WITH POT Perú –Caldas

MUNICIPALITIES	FARMS	HECTARES
Aguadas	16	956,77
Aranzazu	5	933,82
Salamina	7	949,68
Pácora	9	479,11
Villamaria	2	124,19
Neira	1	207,09
Manizales	2	90,65
Total	42	3.286,31

FARMS WITH POT Perú –Quindío

MUNICIPALITIES	FARMS	HECTARES
Pijao	2	430,00
Salento	2	181,04
Total	4	611,04

FARMS WITH POT Perú –Risaralda

MUNICIPALITIES	FARMS	HECTARES
Guática	3	141,70
Total	3	141,70

FARMS WITH POT Perú –Tolima

MUNICIPALITIES	FARMS	HECTARES
Herveo	1	2,50
Total	1	2,50

DO YOU WANT MORE INFORMATION?

CLICK TO VIEW THE FARMS

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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.

[CLICK HERE](#)



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

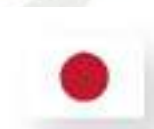
The agreement between the Ministry of Agriculture, Forestry and Fisheries -MAFF-, and the Colombian Agricultural Institute (ICA), under the Ministry of Agriculture and Rural Development of Colombia (MADR).

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.

[CLICK HERE](#)

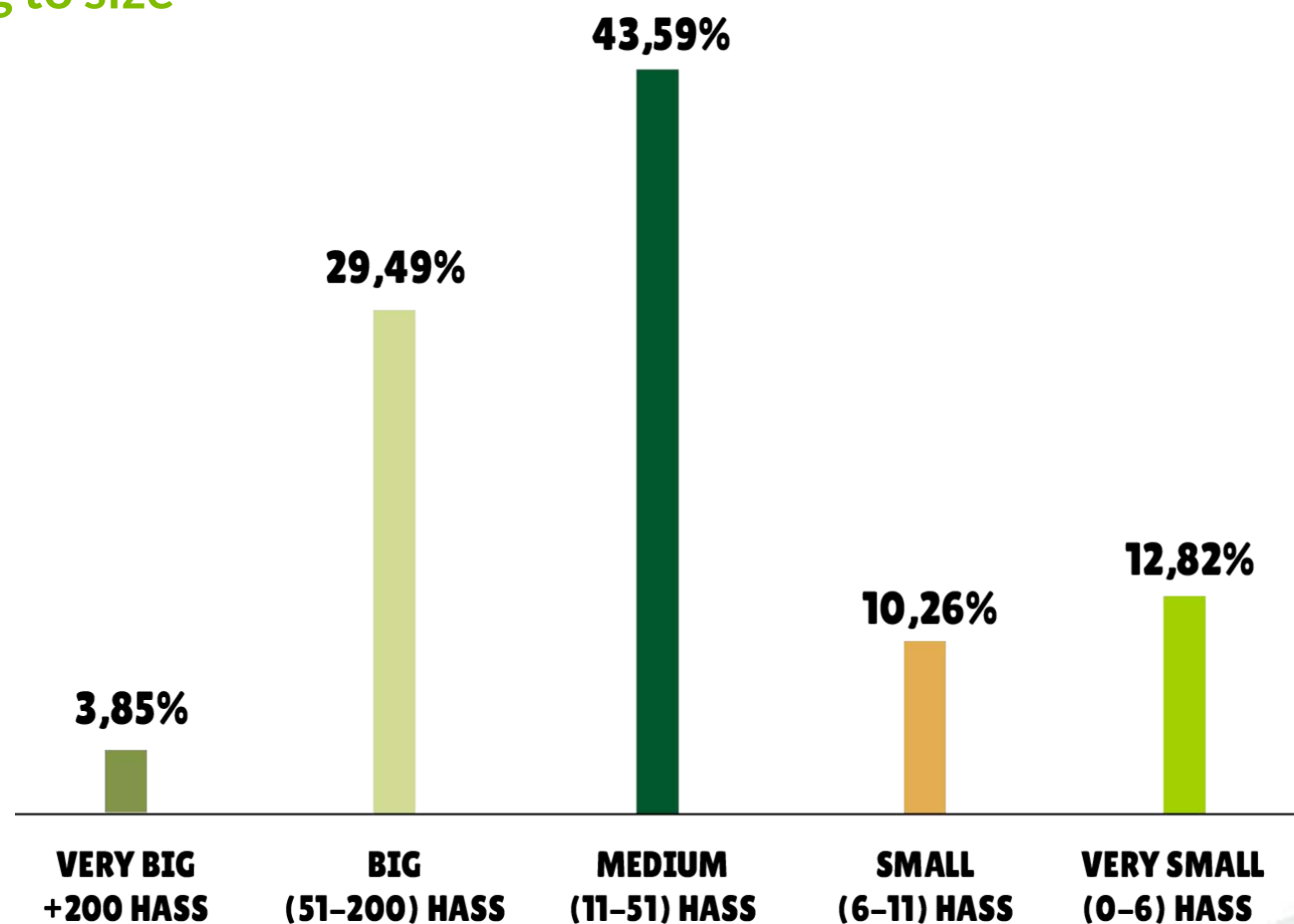
FARMS WITH JAPON OWP

DEPARTMENT	FARMS	HECTARES
Caldas	25	1.511,41
Valle del Cauca	10	1.040,74
Antioquia	36	1.015,61
Quindío	2	475,00
Risaralda	7	380,90
La Cauca	1	3,00
Total	81	4.426,66



FARMS WITH JAPON OWP

According to size



FARMS WITH POT Japón –Caldas

MUNICIPALITIES	FARMS	HECTARES
Aguadas	17	975,3
Pácora	7	495,1
Manizales	1	41,0
Total	25	1.511,4

FARMS WITH POT Japón – Valle del Cauca

MUNICIPALITIES	FARMS	HECTARES
Bolivar	5	682,5
Caicedonia	1	153,00
Sevilla	1	142,3
El Dovio	3	63,0
Total	10	1.040,7

FARMS WITH POT Japón –Antioquia

MUNICIPALITIES	FARMS	HECTARES
Urrao	17	848,8
Sonsón	16	122,7
Andes	1	23,5
San Vicente	1	11,0
Jardín	1	9,6
Total	36	1.015,6

FARMS WITH POT Japón –Quindío

MUNICIPALITIES	FARMS	HECTARES
Pijao	2	475,0
Total	2	475,0

FARMS WITH POT Japón –Risaralda

MUNICIPALITIES	FARMS	HECTARES
Guática	5	307,9
Quinchia	2	73,0
Total	7	380,9

FARMS WITH POT Japón –Cauca

MUNICIPALITIES	FARMS	HECTARES
El Tambo	1	3,0
Total	1	3,0

DO YOU WANT MORE INFORMATION?

CLICK TO VIEW THE FARMS

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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](#)



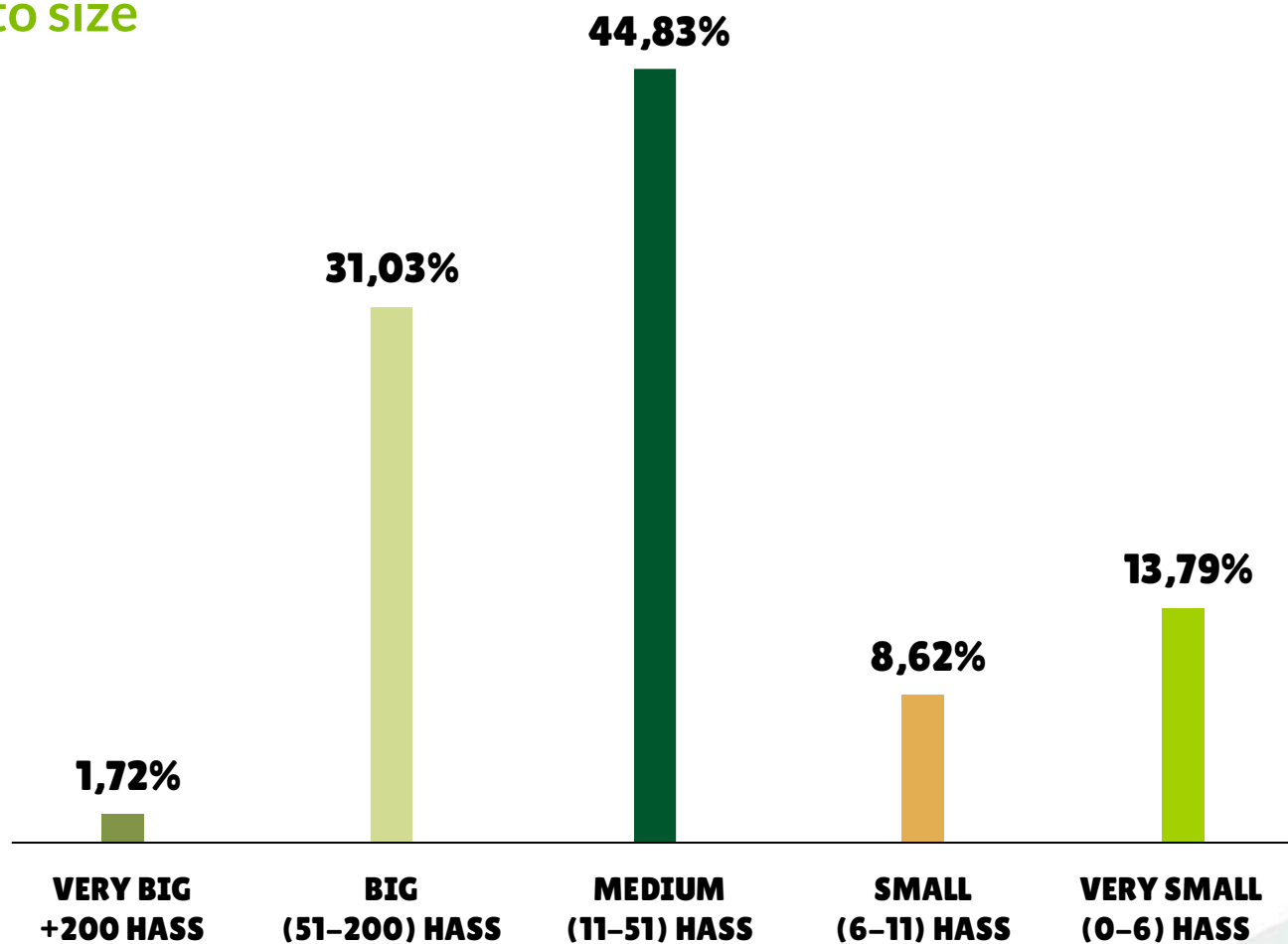
FARMS WITH OWP SOUTH KOREA

	FARMS	HECTARES
Antioquia	31	902,11
Caldas	18	1.172,47
Valle del Cauca	1	153,00
Quindio	1	420,00
Cauca	1	3,00
Total	60	3.109,48



FARMS WITH OWP SOUTH KOREA

According to size



FARMS WITH POT Corea –Caldas

MUNICIPALITIES	FARMS	HECTARES
Aguadas	9	490,42
Pácora	6	445,86
Villamaria	2	195,19
Manizales	1	41,00
Total	18	1.172,47

FARMS WITH POT Corea –Antioquia

MUNICIPALITIES	FARMS	HECTARES
Urrao	14	754,44
Sonsón	14	93,63
Andes	1	23,46
San Vicente	1	15,70
Jardin	1	14,88
Total	31	902,11

FARMS WITH POT Japón –Quindío

MUNICIPALITIES	FARMS	HECTARES
Pijao	1	420,0
Total	1	420,0

FARMS WITH POT Corea –Valle del Cauca

MUNICIPALITIES	FARMS	HECTARES
Caicedonia	1	153,00
Total	1	153,00

FARMS WITH POT Corea –Cauca

MUNICIPALITIES	FARMS	HECTARES
El Tambo	1	3,0
Total	1	3,0

DO YOU WANT MORE INFORMATION?

CLICK TO VIEW THE FARMS

[CLICK HERE](#)



EXPORTS



AVOCADOS
FROM
COLOMBIA

Sustainability from the heart

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EXPORTS AT DESTINATION

In the last five years, Colombia's Hass avocado exports have shown sustained growth and greater market diversification.

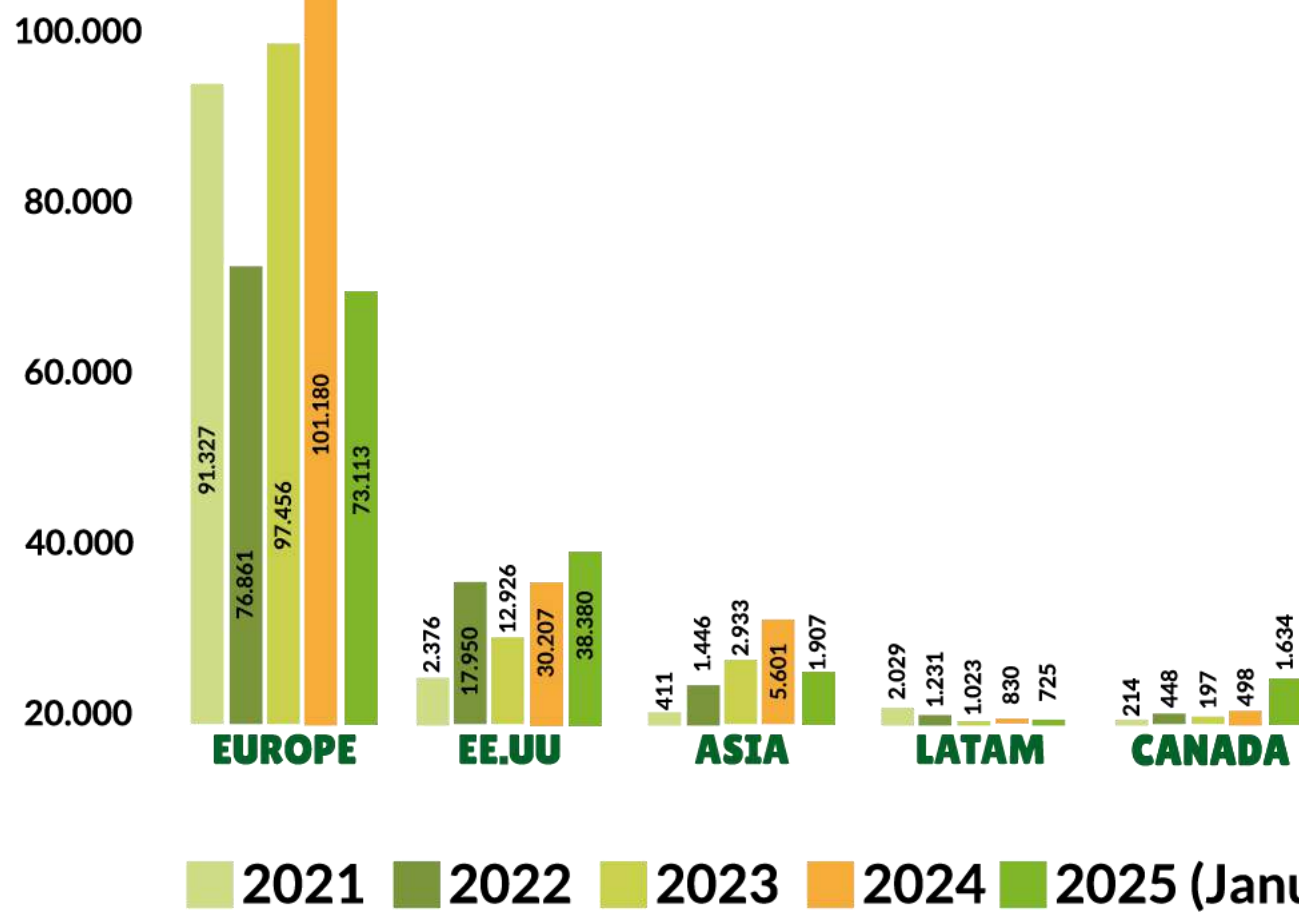
Europe remains the main destination, accounting for the majority of shipments. Despite the decline in 2022, a recovery and steady growth have been observed, reaching over 101 thousand tons in 2024. In 2025, the results of the first half show a strong start, with historically high levels, reflecting both market strength and positive dynamics.

The United States has emerged as the second most important market. The jump from 2,376 tons in 2021 to over 30 thousand in 2024 demonstrates a successful strategy of penetration and consolidation in this high-value market. For 2025, volumes remain stable, suggesting that Colombia is managing to sustain its presence amid strong competition from Mexico and Peru.

In **Asia and Canada**, although volumes are smaller, the trend shows progressive growth, indicating a strategic diversification process toward markets with high medium-term growth potential. In contrast, **Latin America** shows a declining trajectory, reflecting the prioritization of more profitable markets over closer ones.

Overall, the export trajectory shows that Colombia has successfully consolidated its presence in international markets, standing out for sustained growth and the diversification of destinations. The sustainability of this momentum will depend on the ability to maintain product quality, ensure logistical efficiency, and continue expanding coverage into new strategic markets.

EXPORT DESTINATIONS / TONS



INCOME PER KILO

Average FOB in Colombian pesos by market

*Billed by the marketer to the customer

REGION	2017	2018	2019	2020	2021	2022	2023	2024	2025 (JAN – JUN)
Asia	\$7.655	\$8.860	\$9.985	\$7.828	\$8.444	\$9.797	\$6.325	\$24.240	\$22.692
USA	\$7.159	\$5.779	\$8.161	\$6.138	\$6.544	\$9.691	\$7.654	\$9.819	\$10.892
Latam	\$5.418	\$6.337	\$6.303	\$7.088	\$7.822	\$7.547	\$6.516	\$8.126	\$9.832
Europe	\$5.482	\$6.111	\$6.415	\$7.070	\$7.880	\$7.099	\$7.761	\$8.110	\$7.034
Canada	\$2.752	\$4.720	\$6.965	\$5.676	\$6.694	\$5.252	\$8.186	\$9.578	\$6.111

Note: Does not include return to producer

MAIN MARKETS

EUROPE



AVOCADOS
FROM
COLOMBIA

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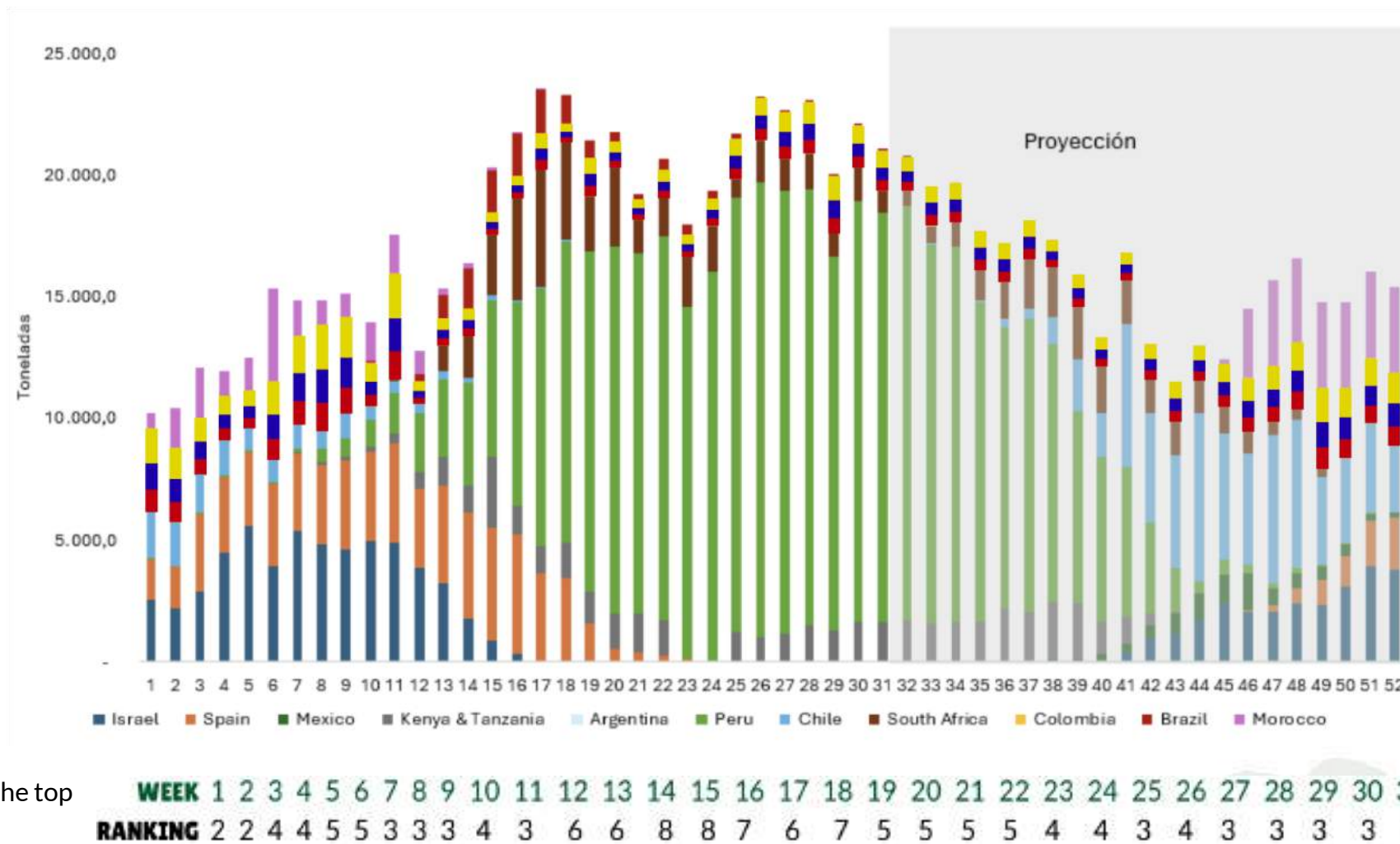
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EUROPA SUPPLIERS



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Colombia in the ranking of the Top 10 Exporting Countries 



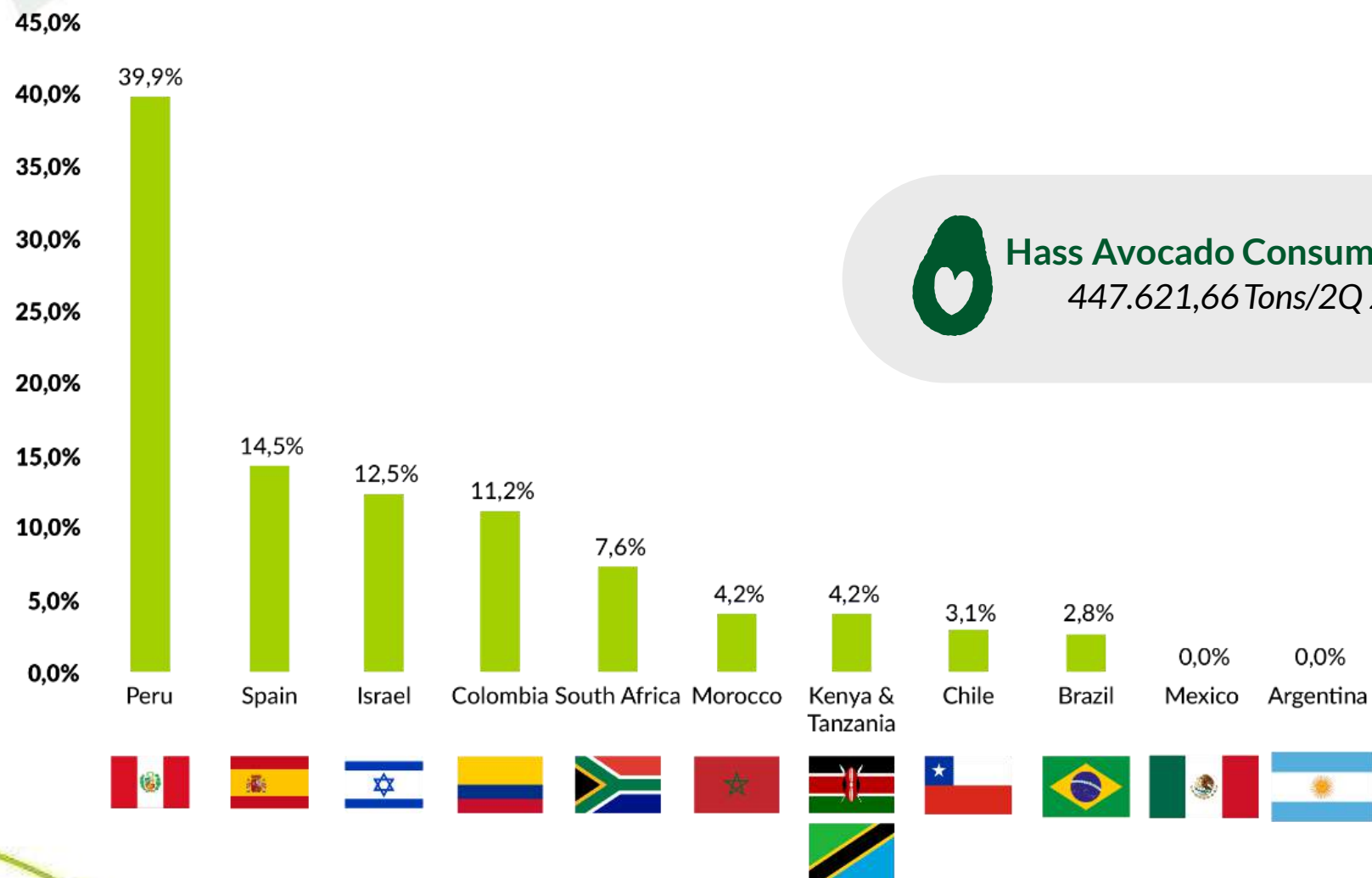
Colombia in the ranking of the top 10 exporting countries

SOURCE: Subtrop

EUROPA SUPPLIERS 2025



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Hass Avocado Consumption in Europe
447.621,66 Tons/2Q 2025

Per capita consumption
0,6 Kg per Cápita

EUROPE CONSUMPTION 2024 AND 2025

	Per Capita Consumption (2024)	Cumulative Per Capita Consumption(2024)	Per Capita Consumption by 2025	Cumulative Per Capita Consumption 2025
Q1	0,207		0,28	
Q2	0,306	0,514	0,32	0,60
Q3	0,298	0,812	0,34	0,95
Q4	0,242	1,053	0,25	1,20

The projected consumption for 2025 (Q3 and Q4) is estimated based on fruit import data into Europe. Accordingly, an increase in consumption is projected by the end of the year.

EXPORTS TO EUROPEAN COUNTRIES

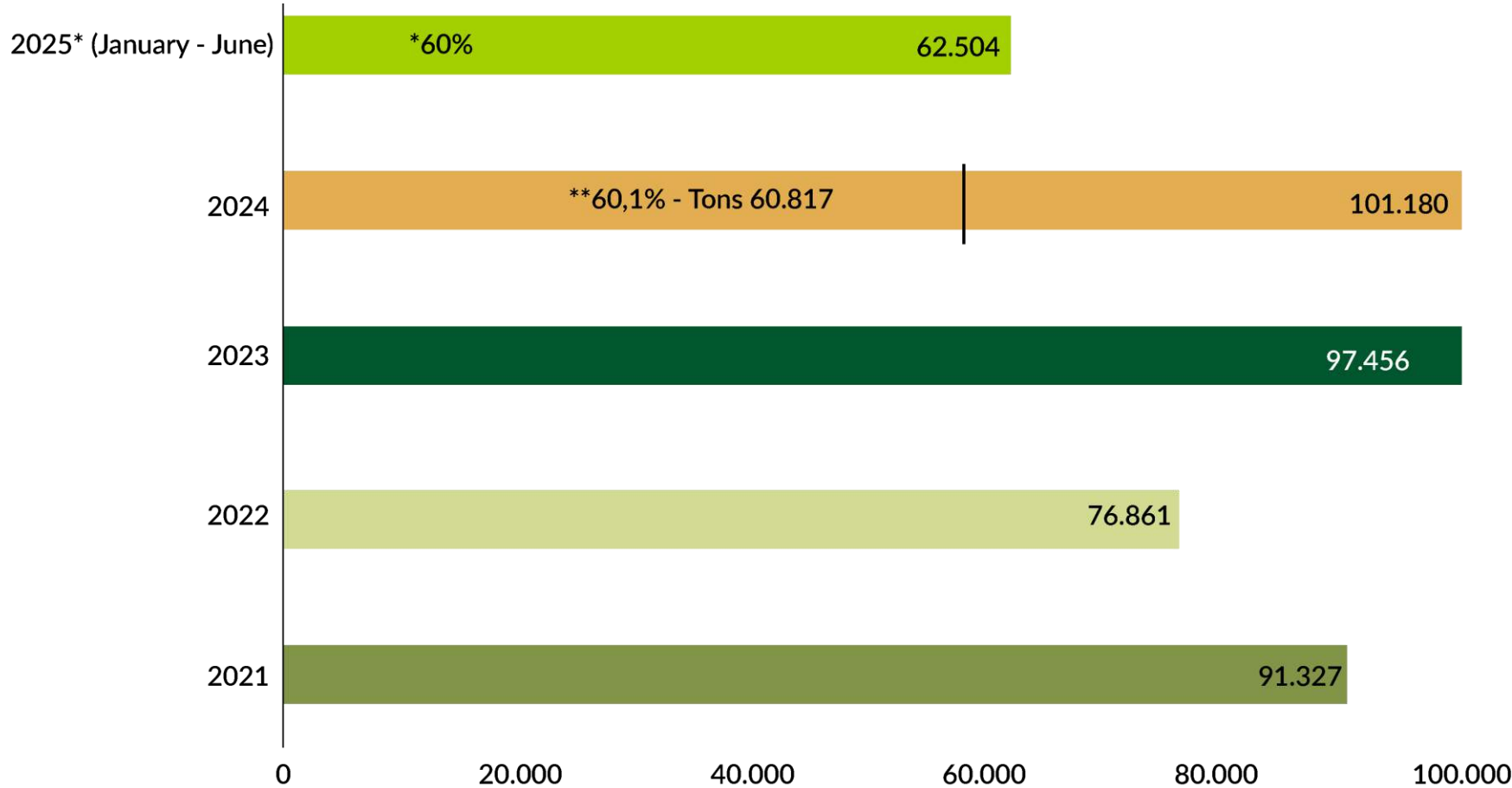
COUNTRY	2021	2022	2023	2024	2025 (JAN-JUN)
Netherlands	50.086	46.764	53.472	60.154	34.917
United Kingdom	11.521	10.727	12.459	11.507	8.304
Belgium	5.893	3.264	5.579	9.868	6.046
Spain	11.807	9.236	13.996	11.546	5.691
France	5.462	2.239	5.257	2.905	4.144
Germany	3.646	2.724	5.407	3.826	2.540
Other	2.914	1.907	1.286	1.374	863
Total	91.329	76.861	97.456	101.180	62.504

EXPORTS EUROPE

Tons



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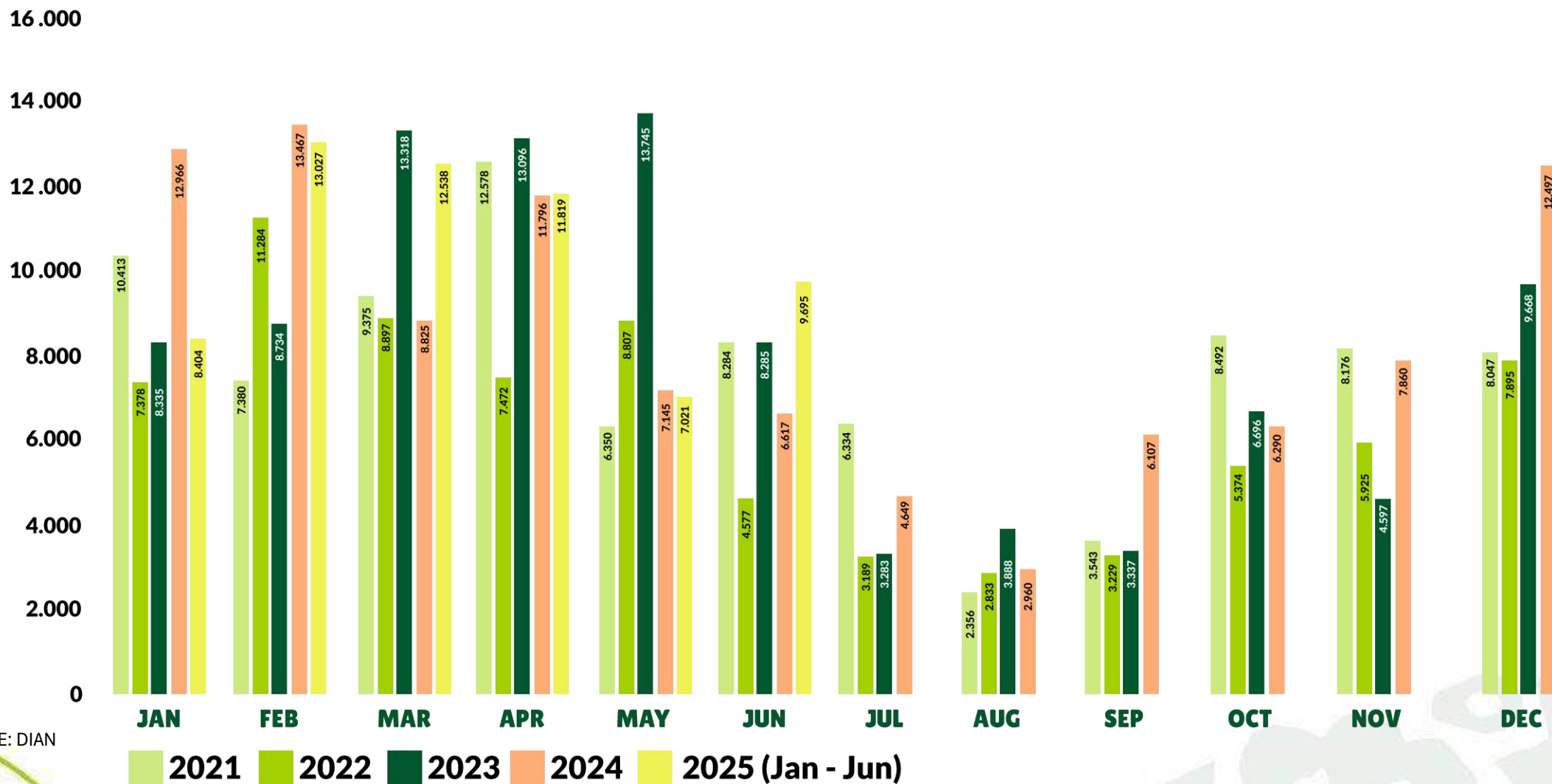
SOURCE: DIAn
*2Q 2025 share of total projected volume for 2025
**2Q 2024 share of total annual volume

EUROPE EXPORTS

Tons| Month



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SOURCE: DIAN

EUROPEAN PORTS

Entry Avocados from Colombia



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	% RECEPTION
ROTTERDAM	44%
AMBERS - ANTWERPEN	17%
VLISSINGEN	13%
ALGECIRAS	10%
DUNKERQUE	6%
LONDON GATEWAY	5%
SOUTHAMPTON	2%
PORTSMOUTH GB	2%
OTROS	1%

SOURCE: SICEX

MAIN MARKETS

USA



AVOCADOS
FROM
COLOMBIA

Sustainability from the heart

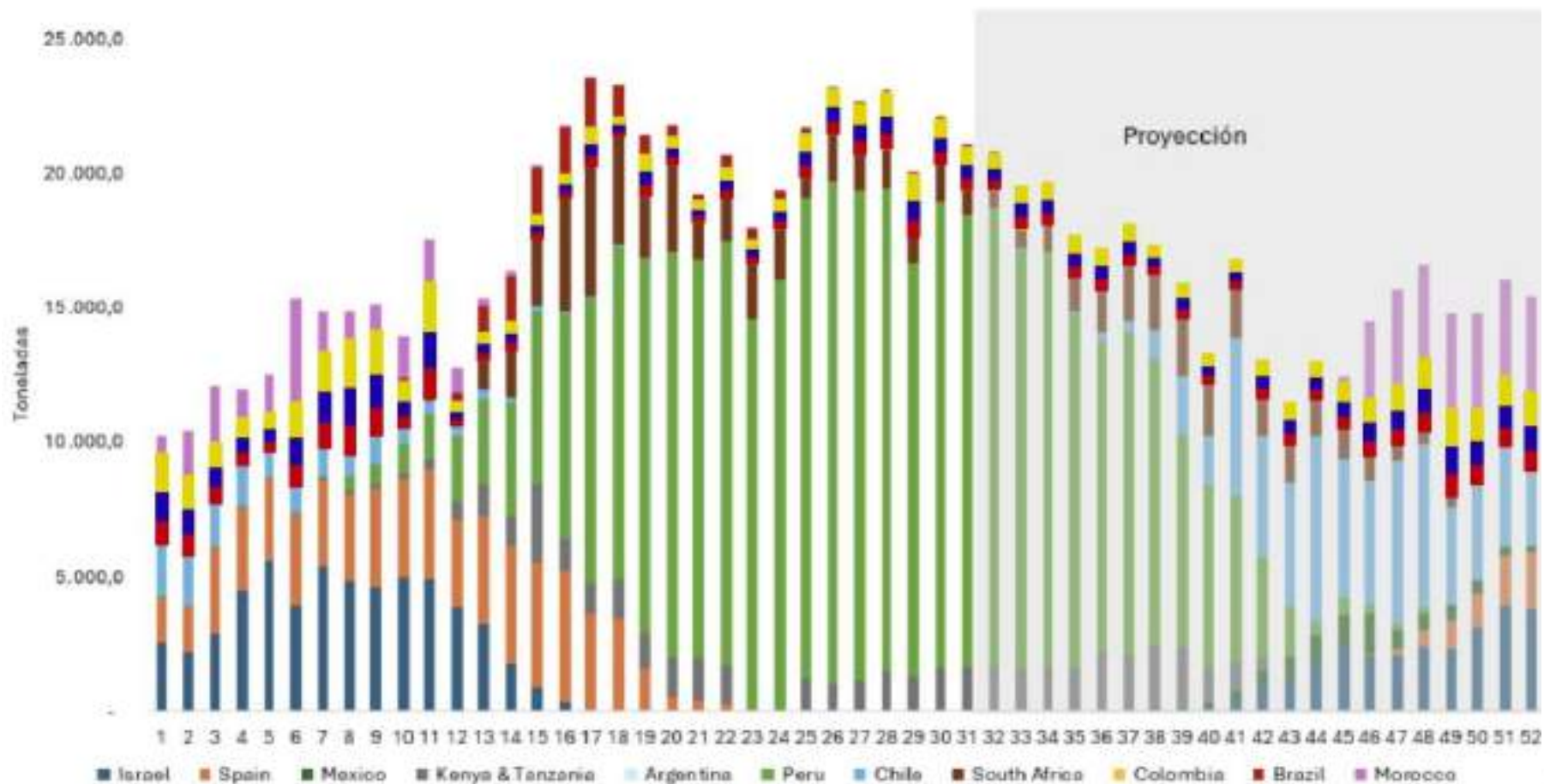
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USA SUPPLIERS



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Colombia in the ranking of the Top 6 Exporting Countries 



Colombia in the ranking of the top 6 exporting countries

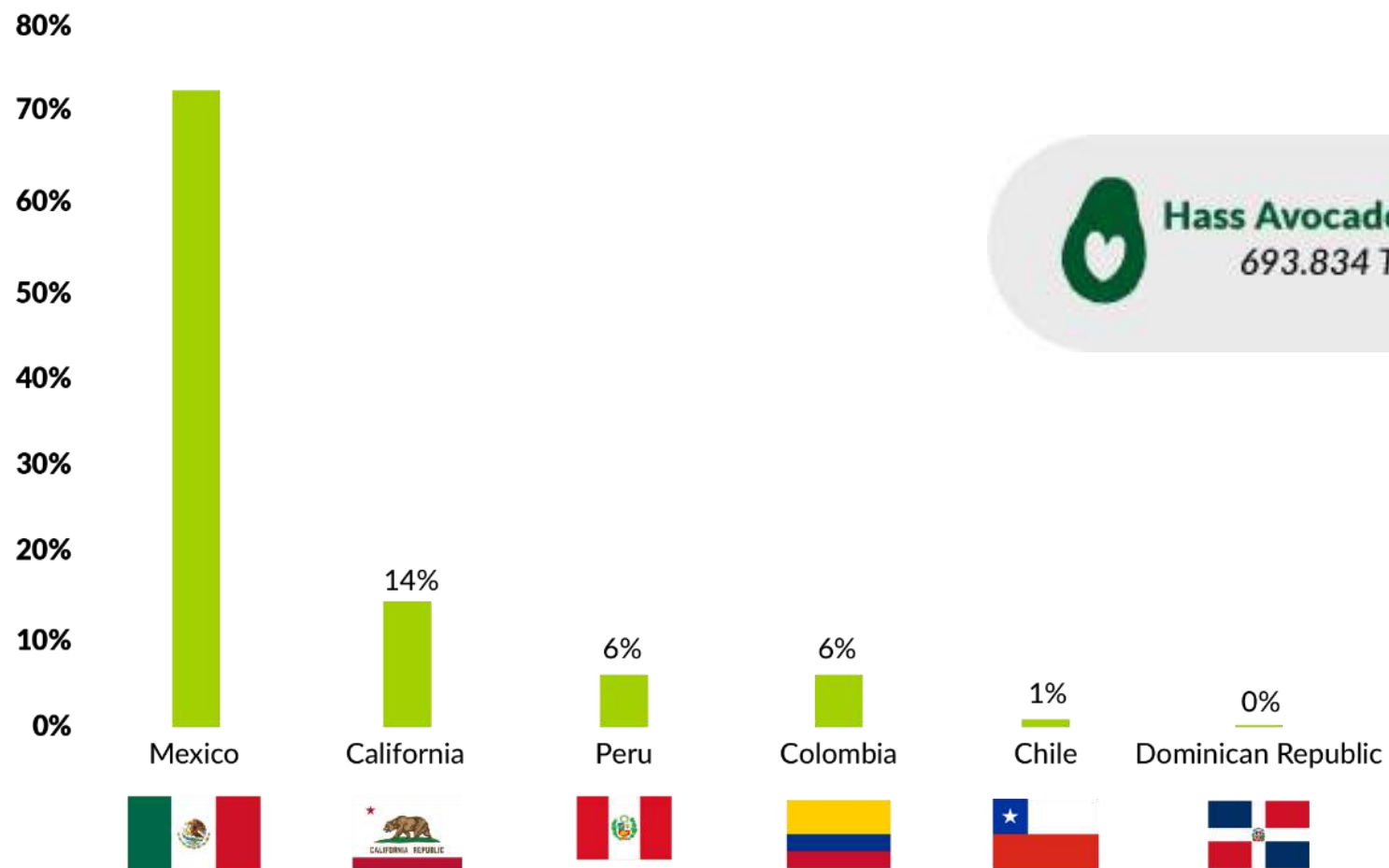
WEEK	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
RANKING	2	2	4	4	5	5	3	3	3	4	3	6	6	8	8	7	6	7	5	5	5	5	4	4	3	4	3	3	3	3	3

Source: HAB

USA SUPLIERS 2025



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Hass Avocado Consumption in the USA
693.834 Tons/2Q 2025

Per capita consumption
2 Kg per Cápita

UNITED STATES CONSUMPTION 2024 AND 2025

The projected consumption for 2025 (Q3 and Q4) is estimated based on fruit import data into the United States. Accordingly, consumption by the end of the year is expected to remain at the same level as in 2024.

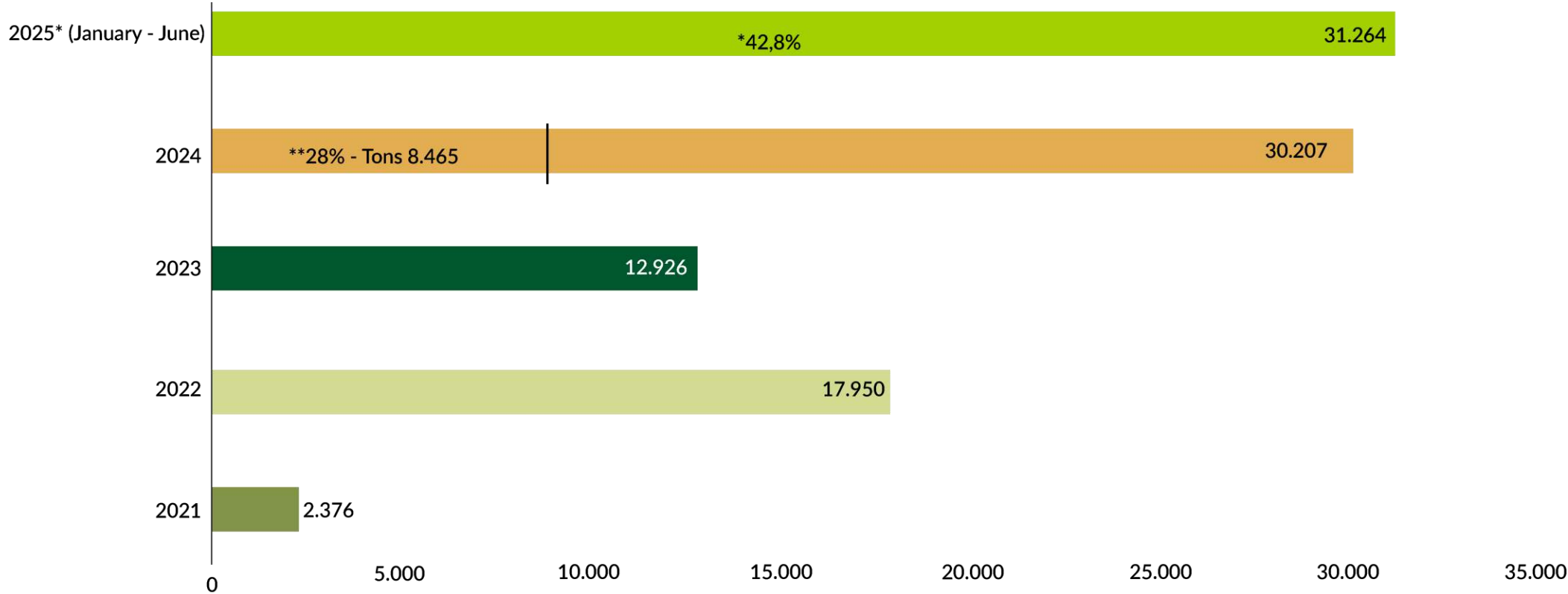
	Per Capita Consumption by Quarter (Q) (2024)	Cumulative Per Capita Consumption (2024)	Per Capita Consumption by Quarter (Q) (2025)	Accumulated Per Capita Consumption 2025
Q1	1,0		0,9	
Q2	1,0	2,0	1,1	2,0
Q3	0,95	3,0	1,0	3,0
Q4	0,89	3,9	0,8	3,9

EXPORTS TO USA

Tons



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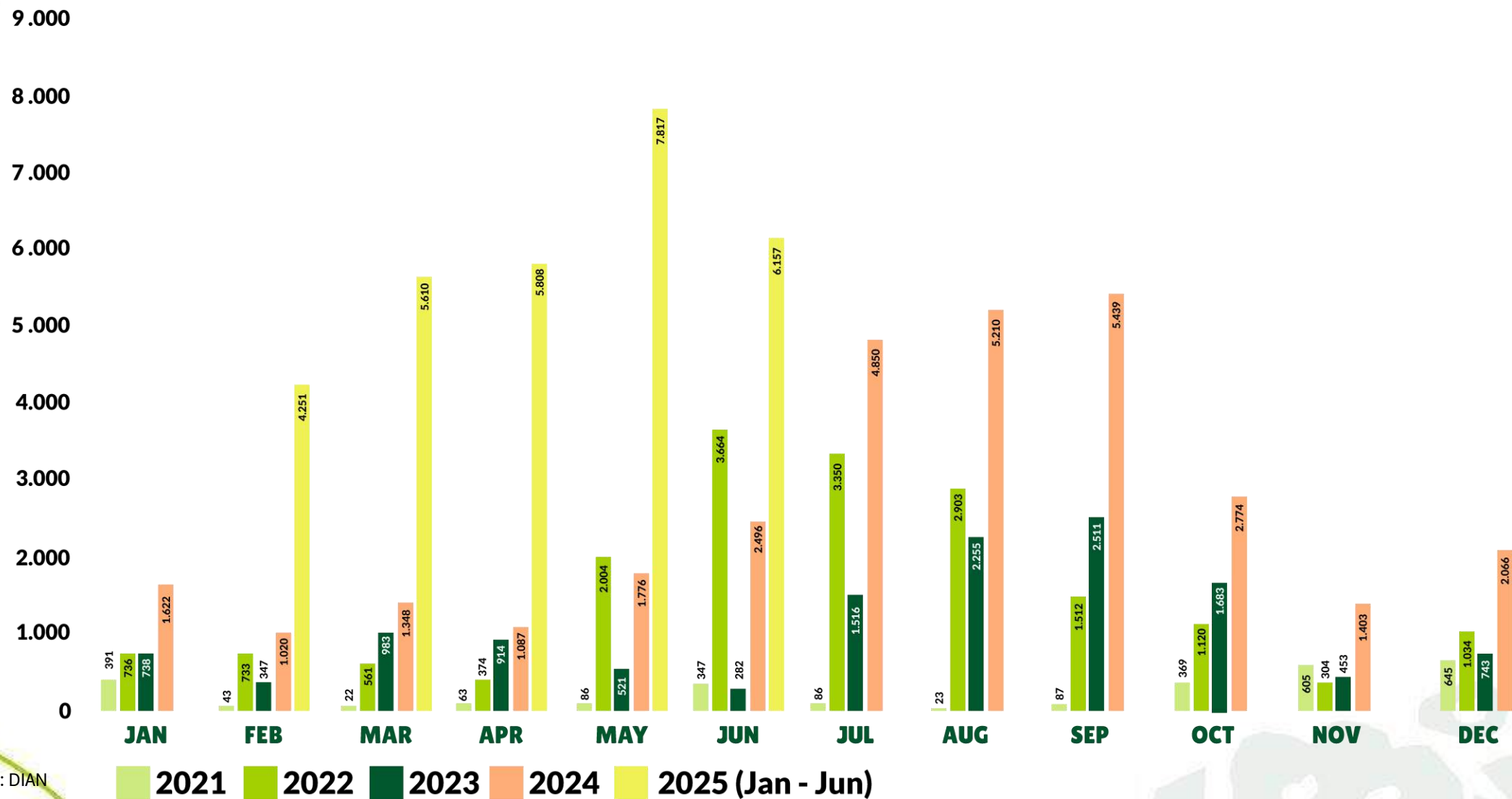
SOURCE: DIAN
*2Q 2025 share of total projected volume for 2025
**2Q 2024 share of total annual volume

EUROPE EXPORTS

Tons| Month



corpo**hass**



SOURCE: DIAN

USA PORTS

Entry Avocados from Colombia

	% RECEPTION
FILADELFIA	57,8%
MIAMI	24,0%
PORT EVERGLADES	9,3%
WILMINGTON D.E.	5,9%
OTROS	3,0%

MAIN MARKETS

ASIA



AVOCADOS
FROM
COLOMBIA

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EXPORTS TO ASIAN COUNTRIES

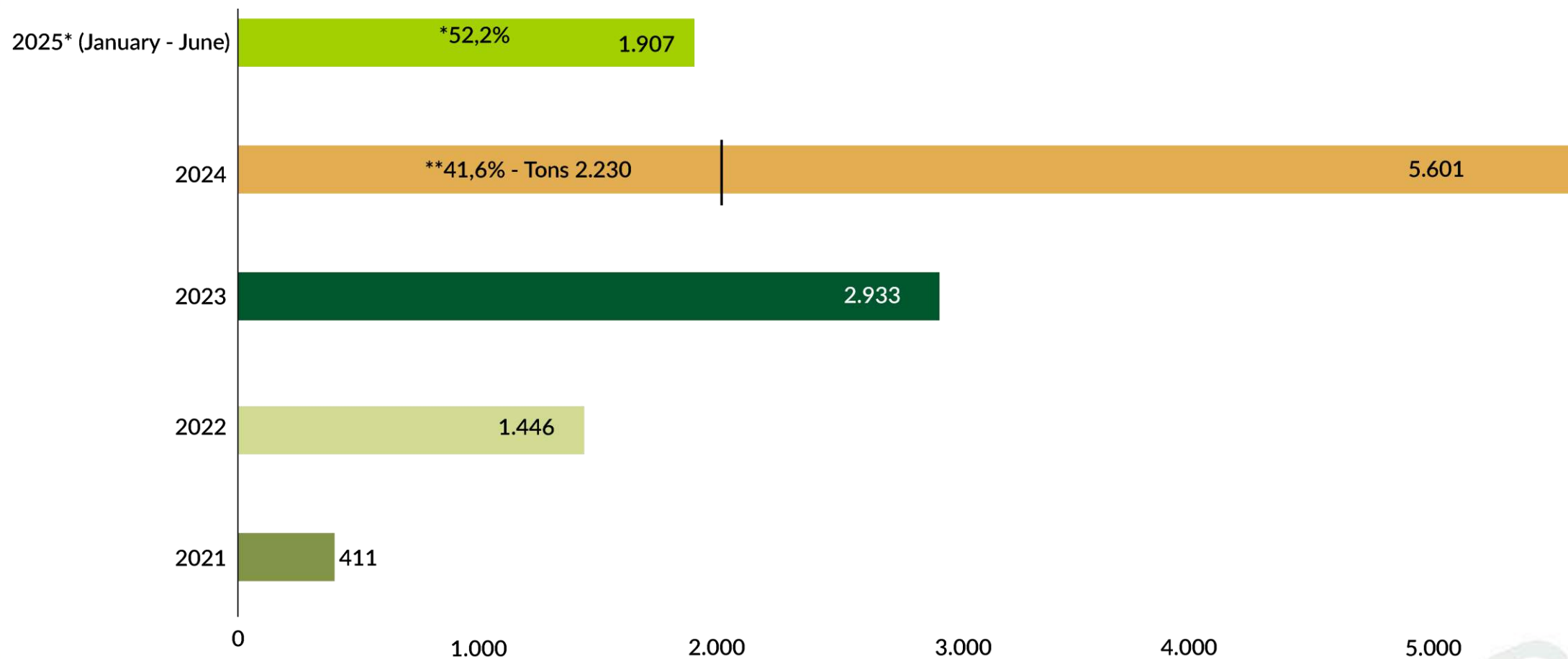
DESTINO	2021	2022	2023	2024	2025 (JAN-JUN)
China	55	88	117	5.126	1.848
Other	31	67	18	75	33
United Arab Emirates	148	272	188	180	26
Hong Kong	0	654	2.442	96	-
Japan	36	206	0	0	-
Saudi Arabia	138	84	76	124	-
South Korea	2	74	92	0	-
Total	2.547	3.517	6.303	11.299	1.907

EXPORTS TO ASIA

Tons



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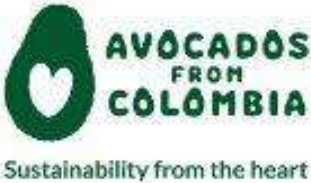
SOURCE: DIAN

*2Q 2025 share of total projected volume for 2025

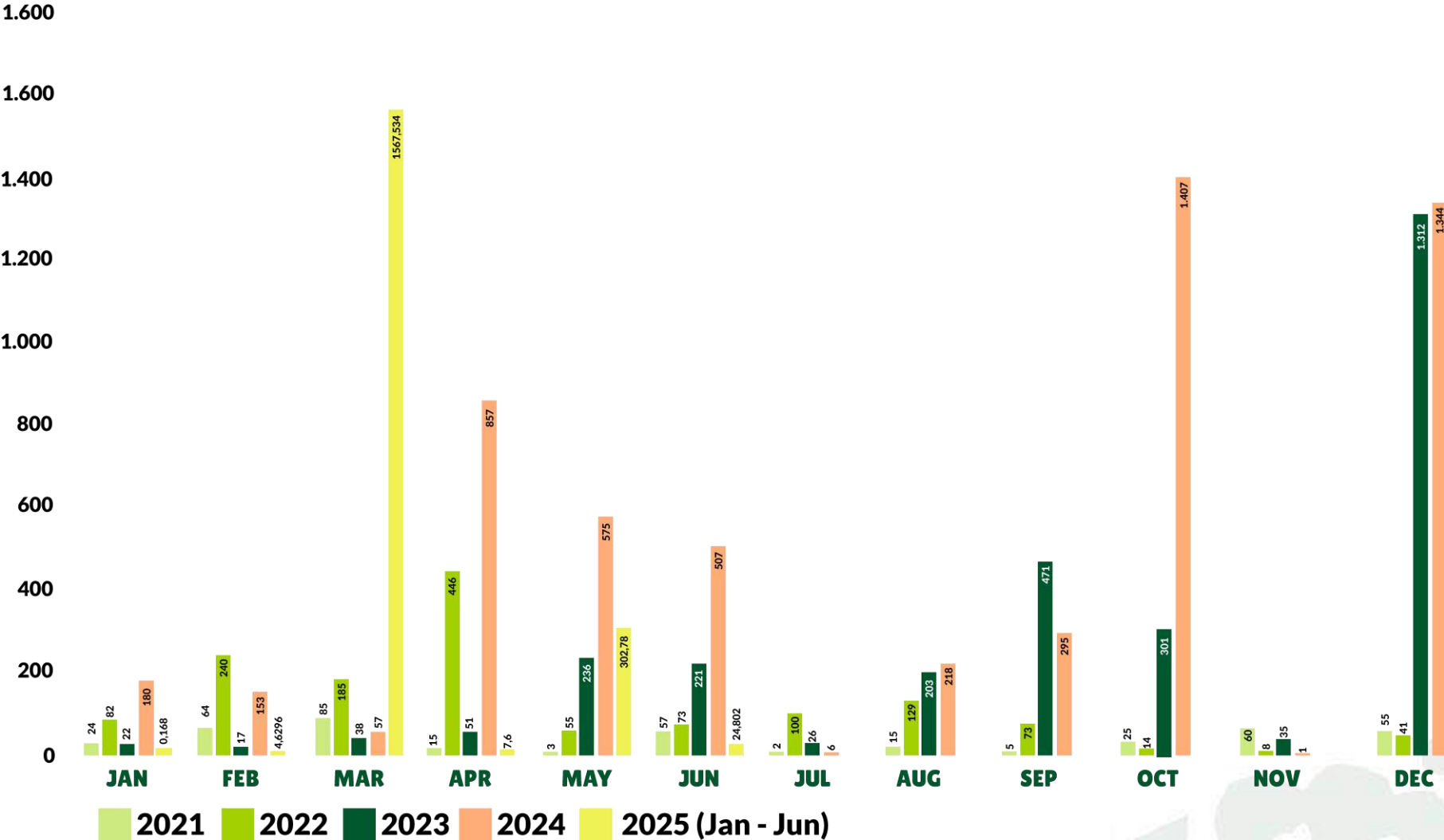
**2Q 2024 share of total annual volume

EUROPE TO ASIA

Tons| Month



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SOURCE: DIAN

MAIN MARKETS

LATAM



AVOCADOS
FROM
COLOMBIA

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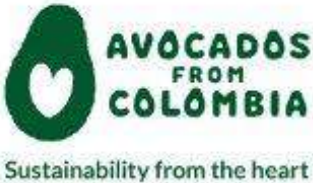
EXPORTS TO LATIN AMERICAN COUNTRIES

Tons

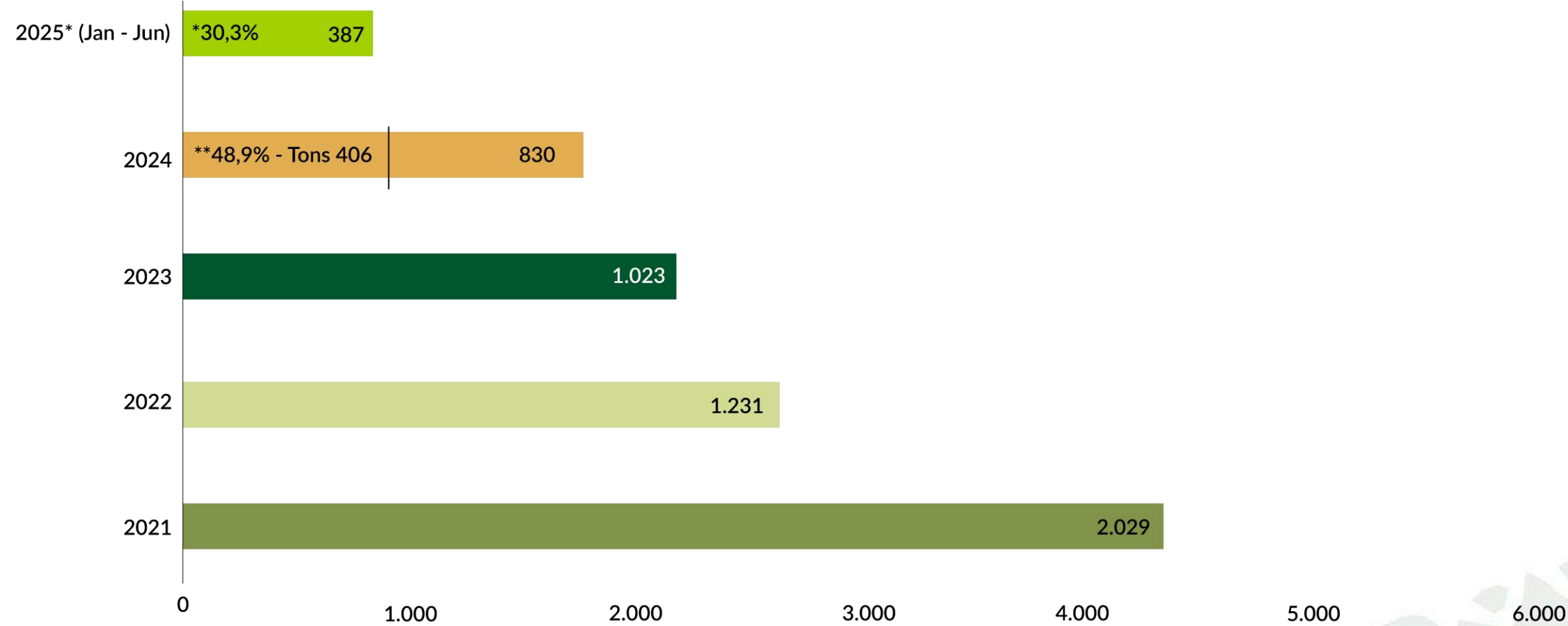
DESTINO	2021	2022	2023	2024	2025 (JAN-JUN)
Guatemala	55	88	117	5.126	1.848
Panama	31	67	18	75	33
Argentina	148	272	188	180	26
Costa Rica	0	654	2.442	96	-
Chile	36	206	0	0	-
Curaçao	138	84	76	124	-
Mexico	2	74	92	0	-
Peru	0,5	0	0	168	-
Other					0
Total	2.029	1.231	1.023	830	387

EXPORTS TO LATAM

Tons



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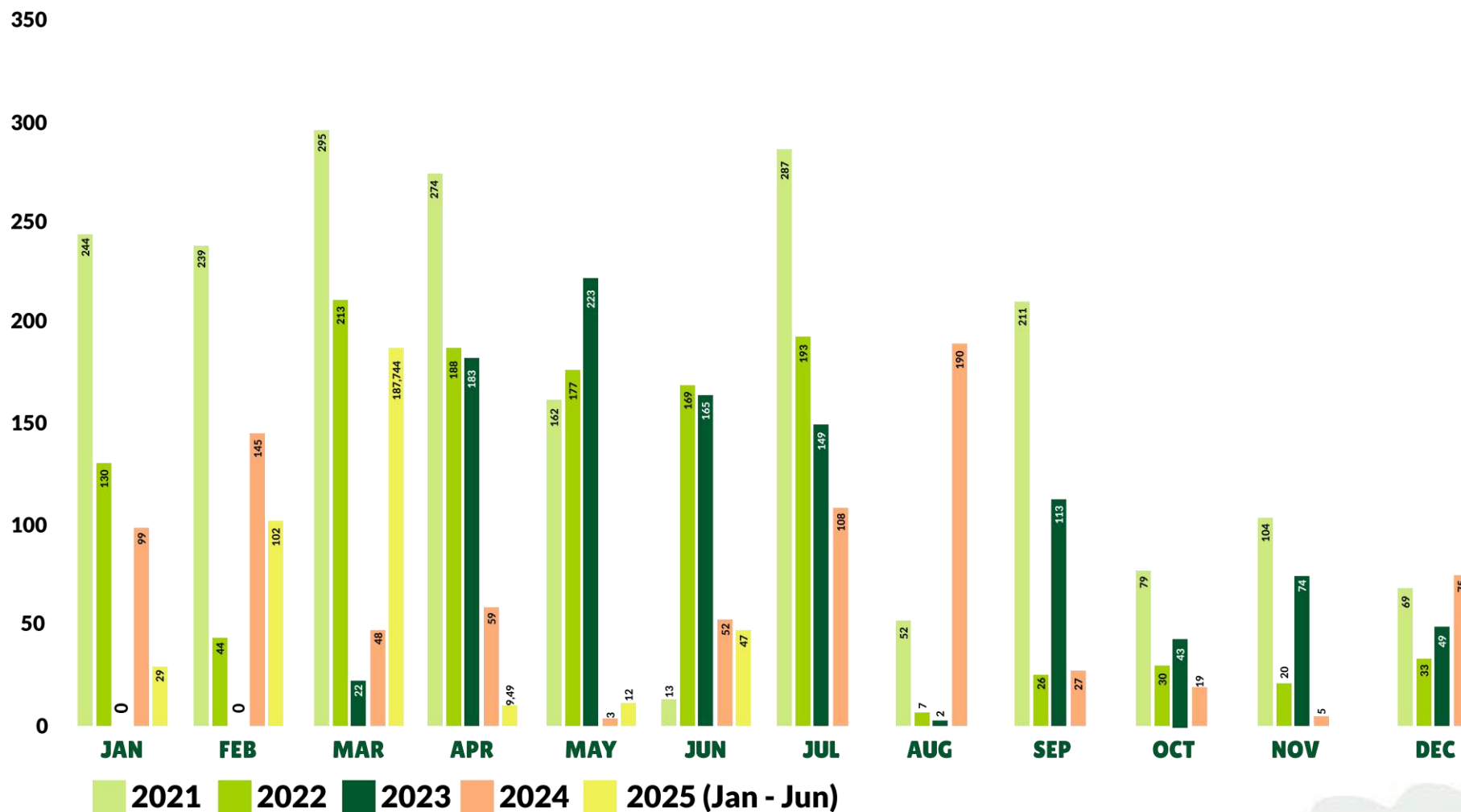
SOURCE: DIAN
*2Q 2025 share of total projected volume for 2025
**2Q 2024 share of total annual volume

EXPORTS TO LATAM

Tons



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MAIN MARKETS

CANADA



AVOCADOS
FROM
COLOMBIA

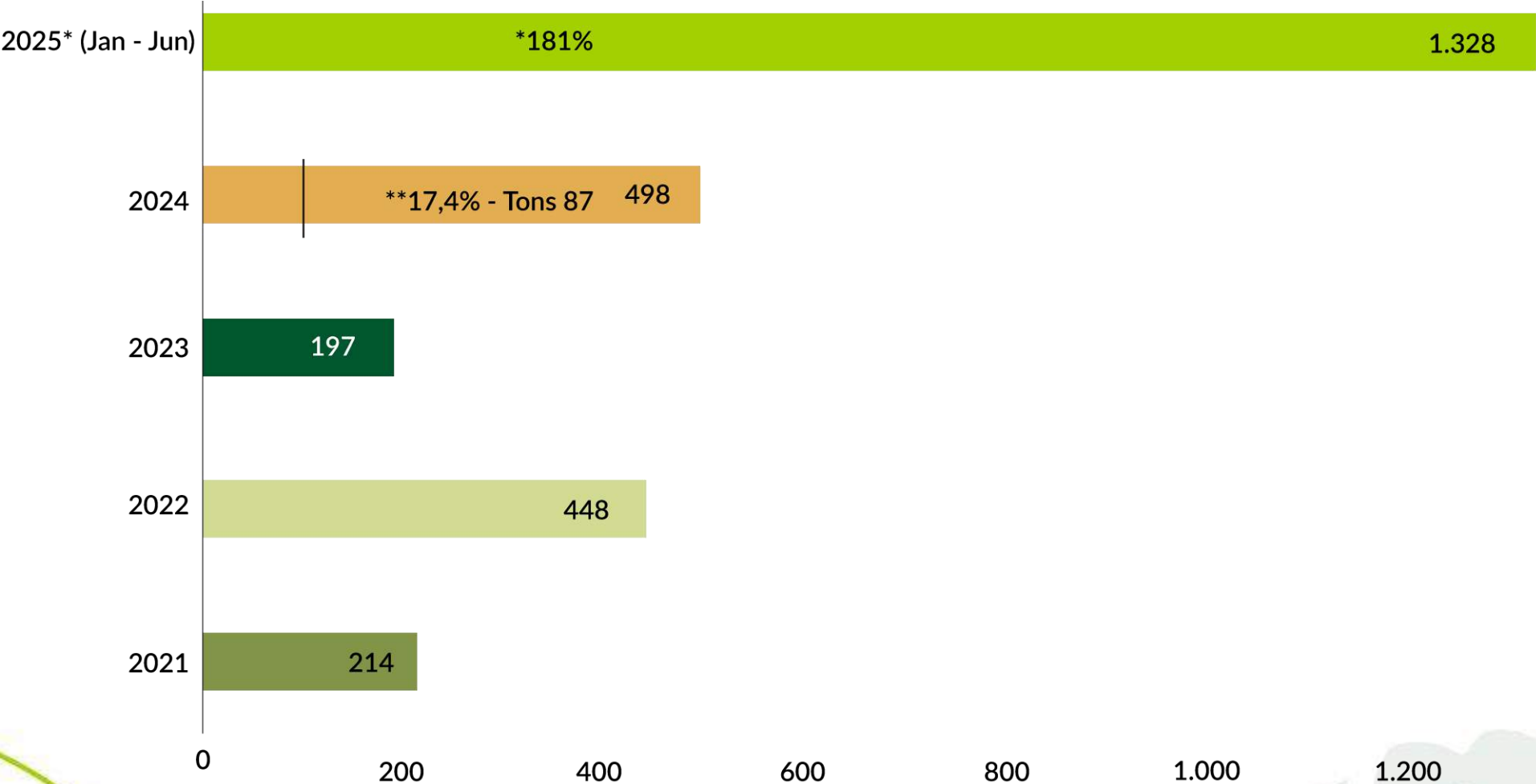
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EXPORTS TO CANADA



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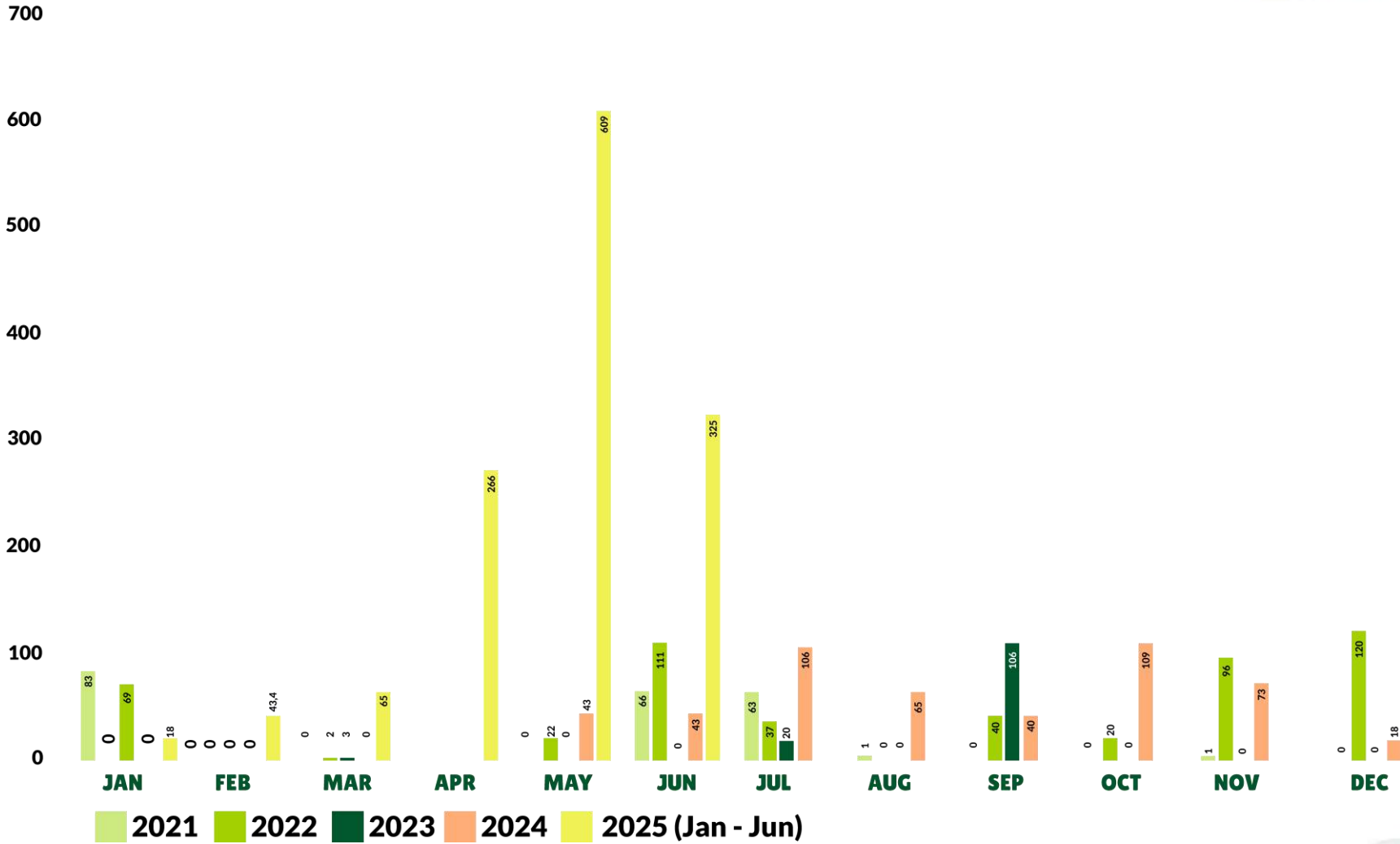
SOURCE: DIAN

EXPORTS TO CANADA

Tons



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SOURCE: DIAN
*2Q 2025 share of total projected volume for 2025
**2Q 2024 share of total annual volume

PROCESSED EXPORTS



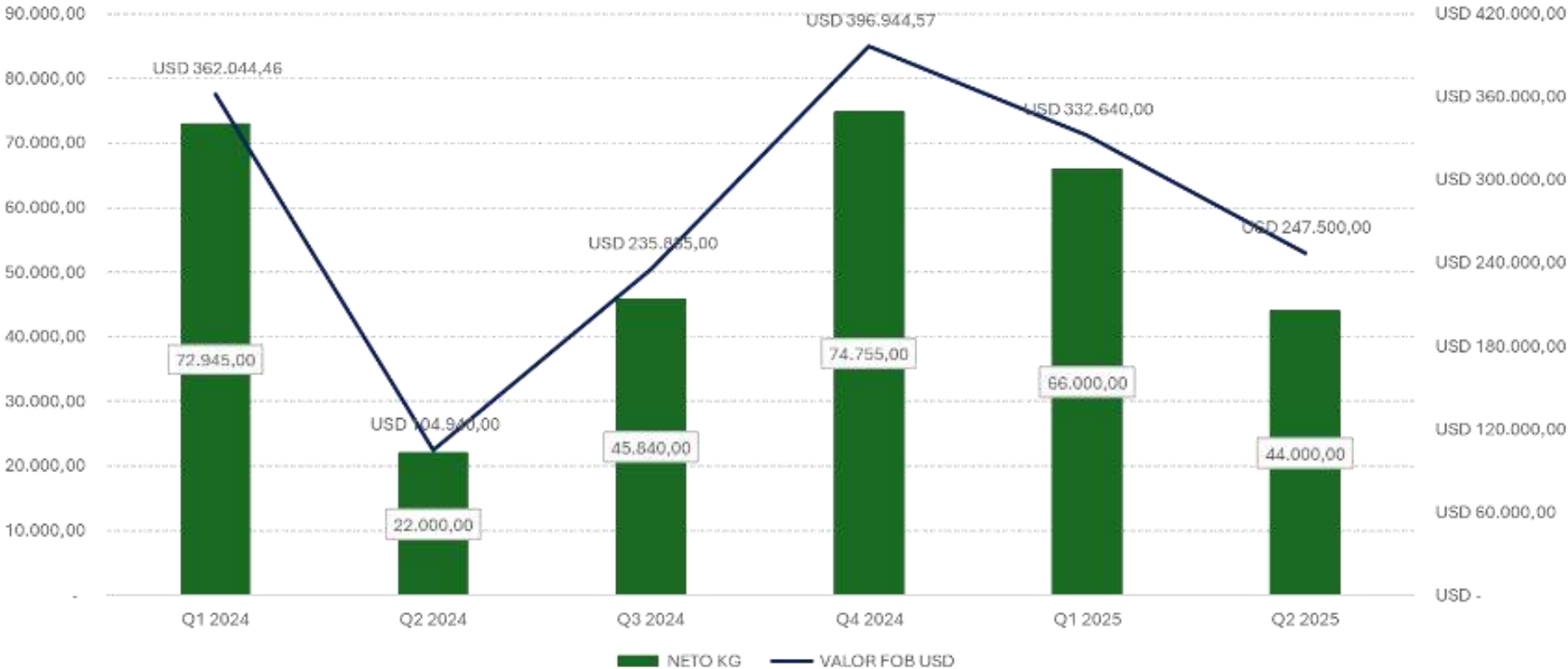
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PROCESSED AVOCADO EXPORTS

Kilograms | Avocado Oil*



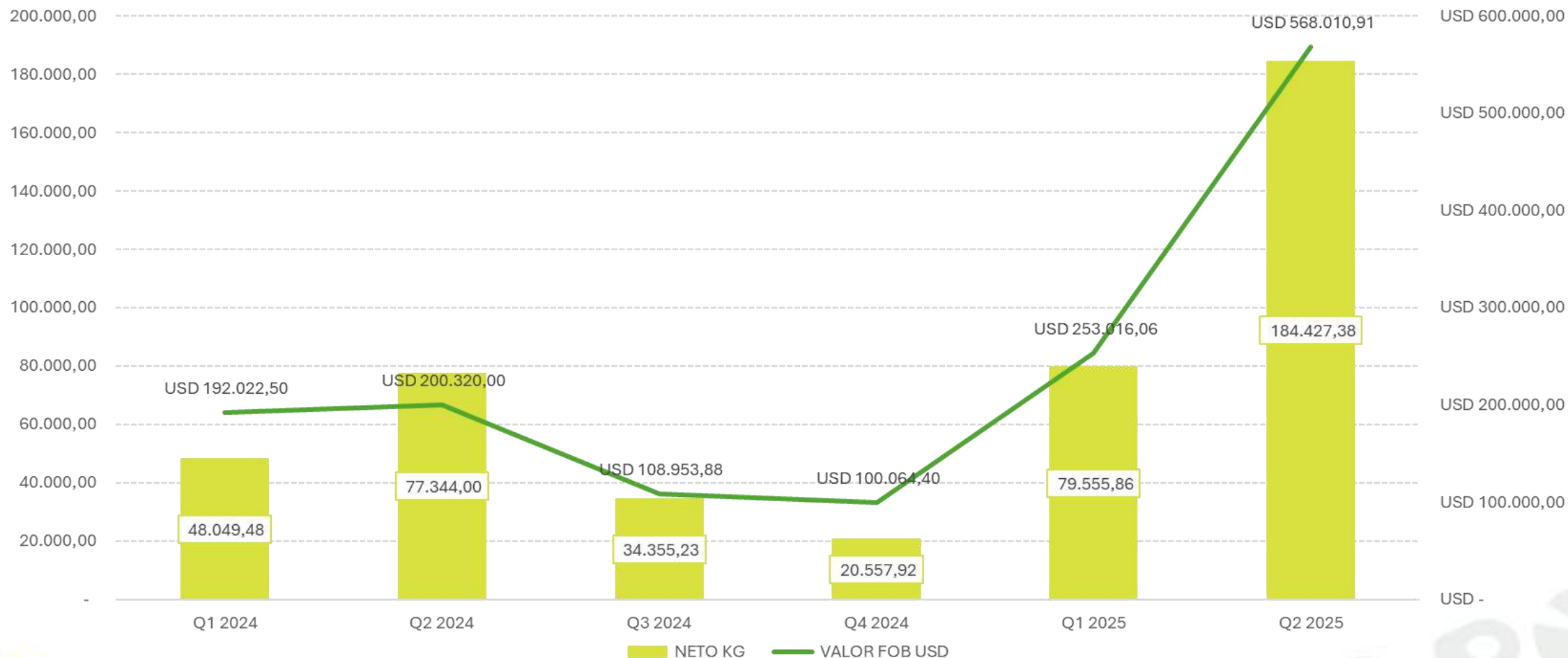
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Source: DIAN
The companies identified in the sector that report exports under tariff code 1515900090 are taken as reference: Vegetable or microbial fats and oils, even refined, not chemically modified, according to the information reported by DIAN.

EXPORTACIONES TRANSFORMADOS

Kilograms| Avocado pulp or preparation *



Source: DIAN

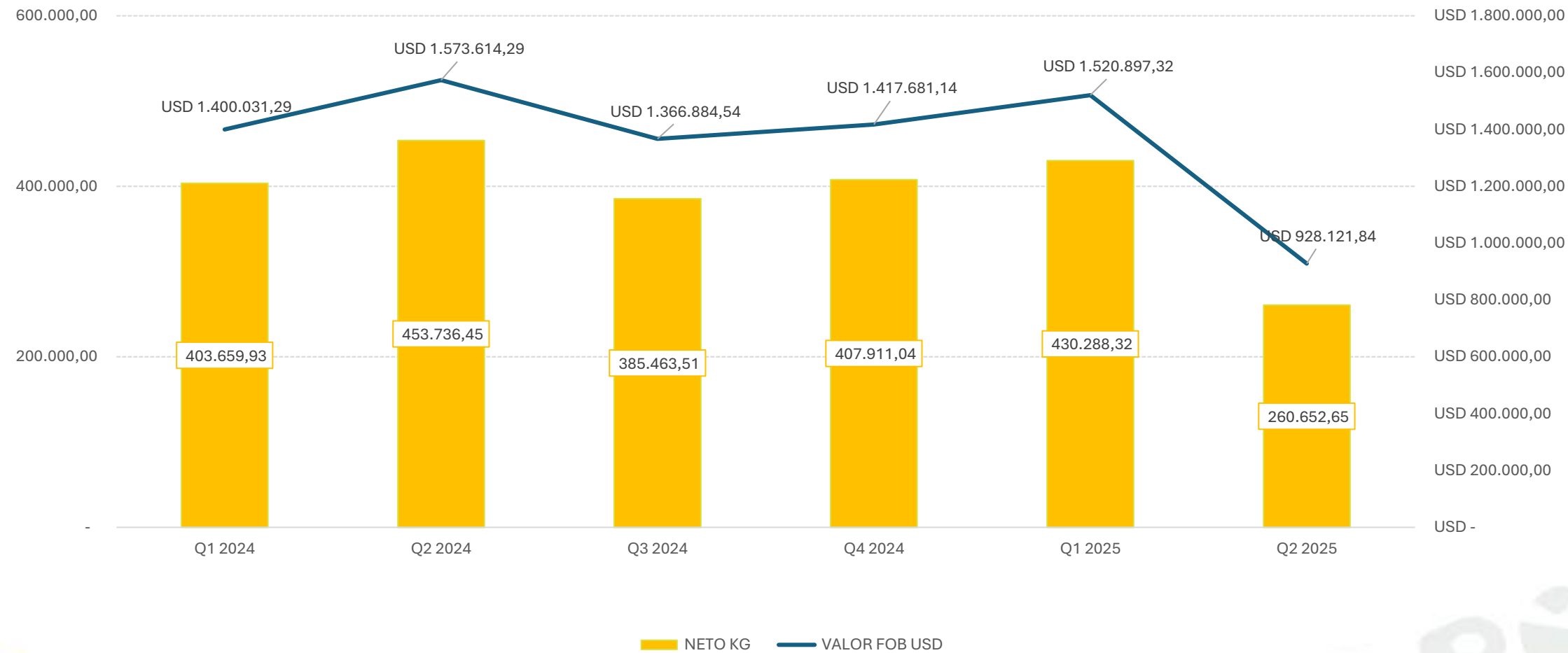
The companies identified in the sector that report exports under tariff code 0811909900: Other fruits and other edible parts of plants, frozen, without added sugar or other sweetener, are taken as reference, according to the information reported by DIAN.

PROCESSED AVOCADO EXPORTS

Kilograms| Avocado sauce or guacamole *



corpohass



Source: DIAN
The companies identified in the sector that report exports under tariff code 2103909000 are taken as reference: Prepared sauces, mixed condiments and seasonings, according to the information reported by DIAN.

TRENDS



AVOCADOS
FROM
COLOMBIA

Sustainability from the heart

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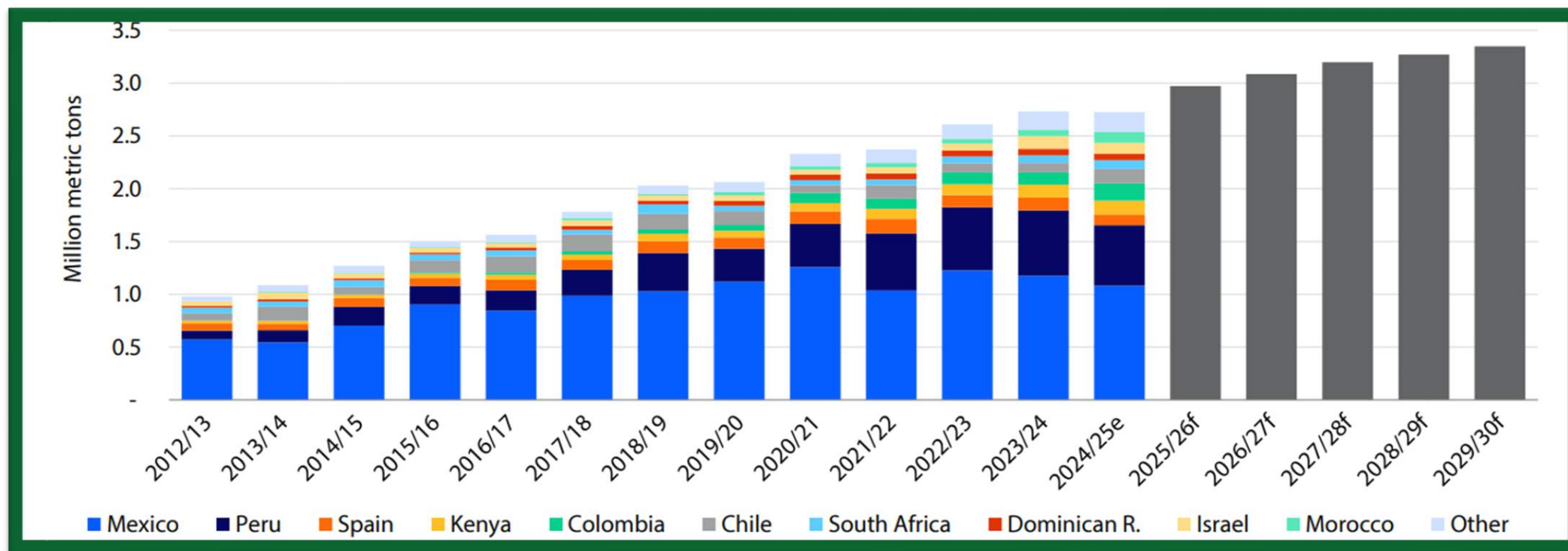
TRENDS IN THE WORLD AVOCADO (FRESH FRUIT)



corpohass

- Market Expansion:** Global avocado exports are expected to exceed 3 million metric tons by 2026/27, compared to 1 million in 2012/13.
- Growth Factors:** The increase is mainly driven by the three leading exporters (Mexico, Peru, and Colombia), the diversification of growing regions, and the entry of new countries into the market.
- New Entrants:** The number of countries exporting at least 5,000 metric tons has grown from 12 to 22 in a decade and is expected to reach 30 before 2030.
- New Regions:** New production and export areas are being developed in East Africa and Central America.
- Availability:** Diversification has led to a more consistent year-round availability of avocados.
- Challenges:** Greater fruit availability may generate oversupply seasons in some markets, requiring higher quality standards to ensure a better consumer experience. Consumption growth is directly linked to consumer satisfaction when enjoying a Hass avocado.
- Trends in Asia:** In China, avocado has become an aspirational food associated with health and lifestyle, with young, urban consumers valuing authenticity and quality. This market is emerging as one of the main drivers of future demand.

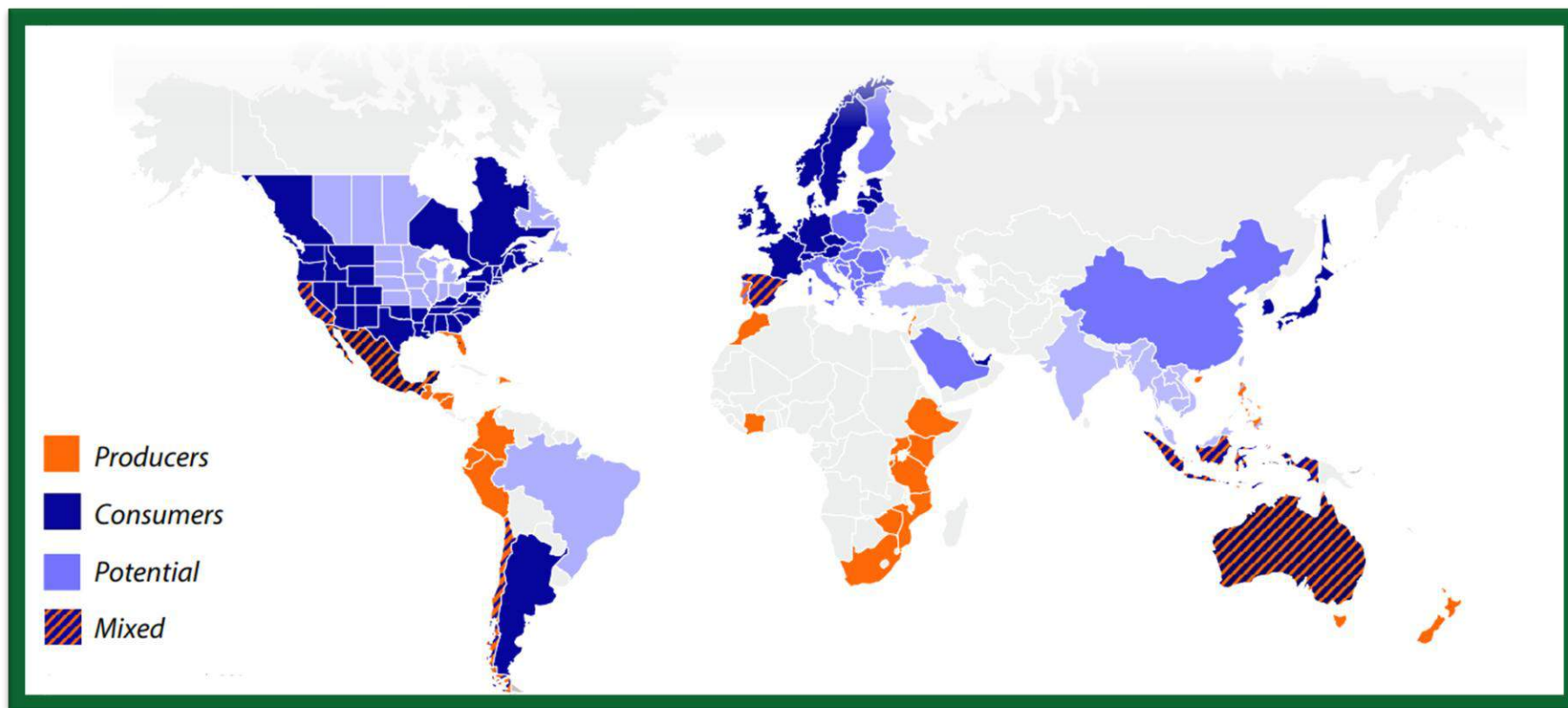
TRENDS IN THE WORLD AVOCADO (FRESH FRUIT)



CONSUMPTION TRENDS IN THE WORLD – AVOCADO (FRESH FRUIT))



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¡THANK YOU!

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COLOMBIA

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