

**Voluntary Report** – Voluntary - Public Distribution

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**Report Name:** Avocado Annual

**Country:** Mexico

**Post:** Guadalajara

**Report Category:** Avocado

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**Report Highlights:**

Mexico's 2025 avocado production is forecast at 2.75 million metric tons (MMT), a three percent increase over 2024 on strong export demand. Exports are forecast at 1.34 MMT in 2025, up five percent year-on-year. The United States is Mexico's number one export market and is the destination for 80 percent of exports by volume. The United States is followed by Canada (seven percent) and Japan (three percent). Mexico's per capita avocado consumption grew nearly ten percent in 2024 to about 27 pounds. Due to growing domestic production imports remain limited and are declining; they are forecast to fall ten percent in 2025 to 3,800 MT.

## **Executive Summary**

Mexico leads the world in avocado production, driven by favorable growing conditions, improved agricultural practices, and proximity to the United States - the top global avocado importer. Mexico's avocado production is expected to increase in 2025, primarily driven by strong export demand, along with growing domestic consumption. Production in 2025 is projected up three percent year-on-year to 2.75 million metric tons (MMT) and exports are forecast five percent higher compared to 2024 at 1.34 MMT.

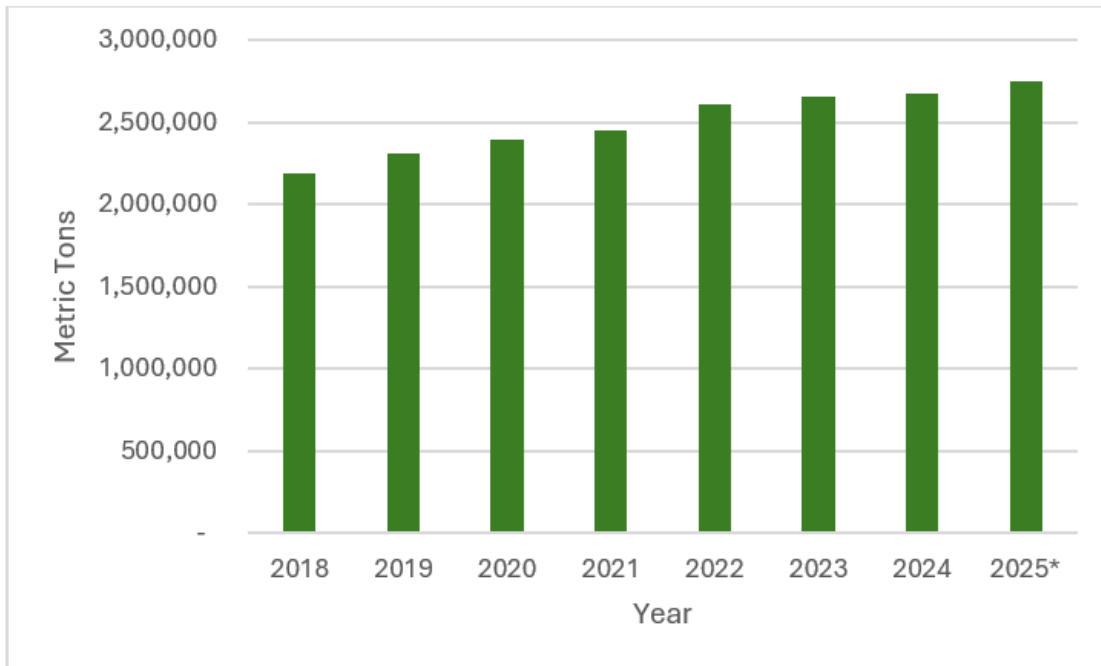
Mexico's per capita avocado consumption is in the top ten globally. Domestic avocado demand is rising, reaching 12 kilograms (27 pounds) in 2024. However, avocados are still considered a luxury good in Mexico due to higher prices than other fruits. Avocado imports, historically minimal to meet domestic demand during lower production periods, have been declining over the past three years to a forecast 3,800 MT in 2025.

## **Production**

Avocado production is forecast to reach 2.75 MMT in 2025, a three percent increase compared to an estimated 2.67 MMT in 2024 based on based on favorable growing conditions, improved agricultural practices, and strong export demand.

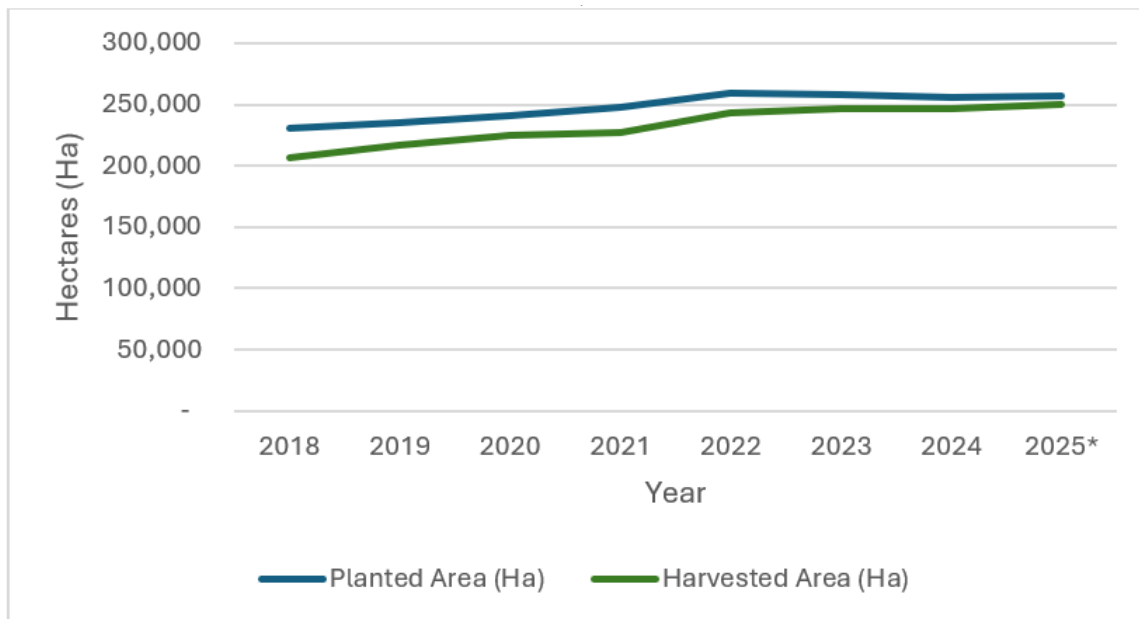
Planted area is forecast basically flat in 2025 at 256,500 hectares (Ha) on producer reports of limited new plantings in line with increased enforcement of land use regulations and a new deforestation-free certification program in the state of Michoacán (see Policy section). Data from Mexico's Agri-food and Fisheries Information Service (SIAP) puts 2024 avocado planted area at 256,200 Ha, a one percent decrease from 2023.

**Graph 1: Mexico Avocado Production**



Data source: SIAP  
\*Post Forecast

**Graph 2: Mexico Avocado Planted and Harvested Area**

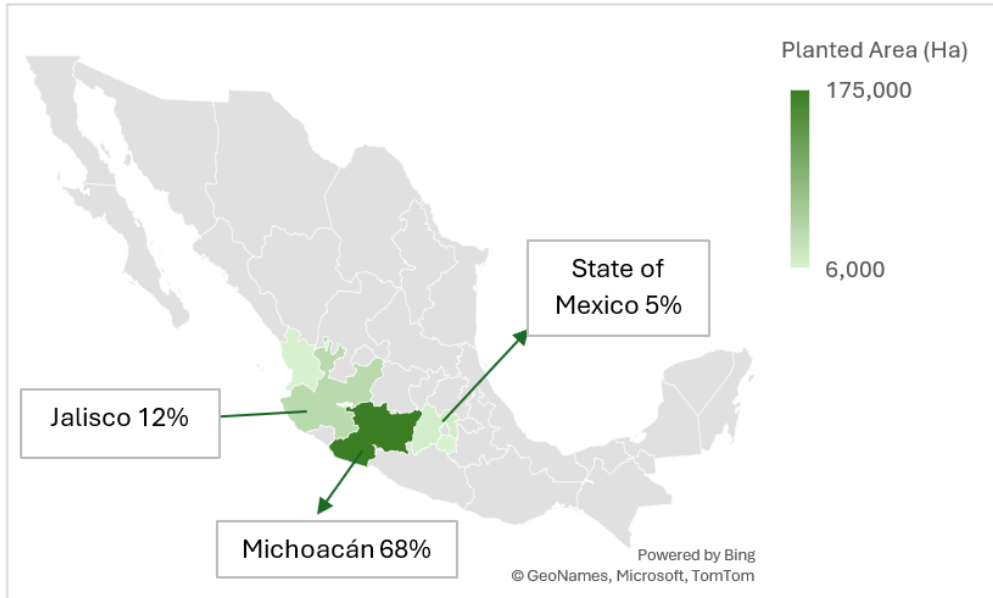


Data source: SIAP  
\*Post Forecast

Michoacán is Mexico's leading avocado producing state with 68 percent of production, followed by Jalisco with 12 percent and the State of Mexico with five percent. Michoacán's production declined by one percent in 2024 due to unfavorable climatic conditions and increased enforcement, such as fines,

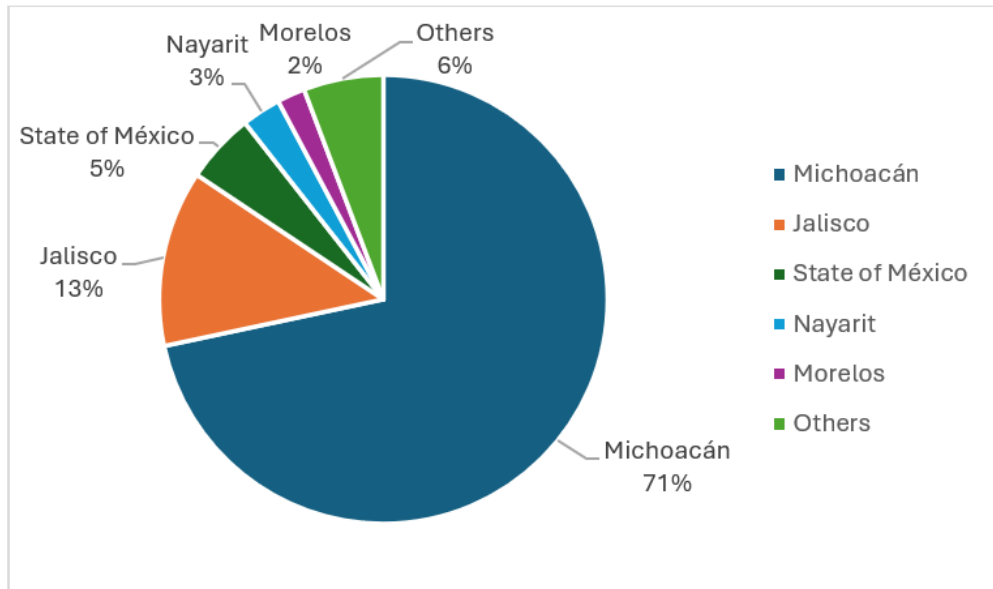
applied to orchards on deforested land. Jalisco’s production increased by five percent on export demand and adequate water resources. While Michoacán and Jalisco are the only states eligible for export to the United States, other states currently export to other international markets as well as supplying the domestic market.

**Map 1: Mexico Avocado Production Areas (2024)**



Data Source: SIAP

**Graph 3: Mexico Avocado Production by State (2024 – share by volume)**



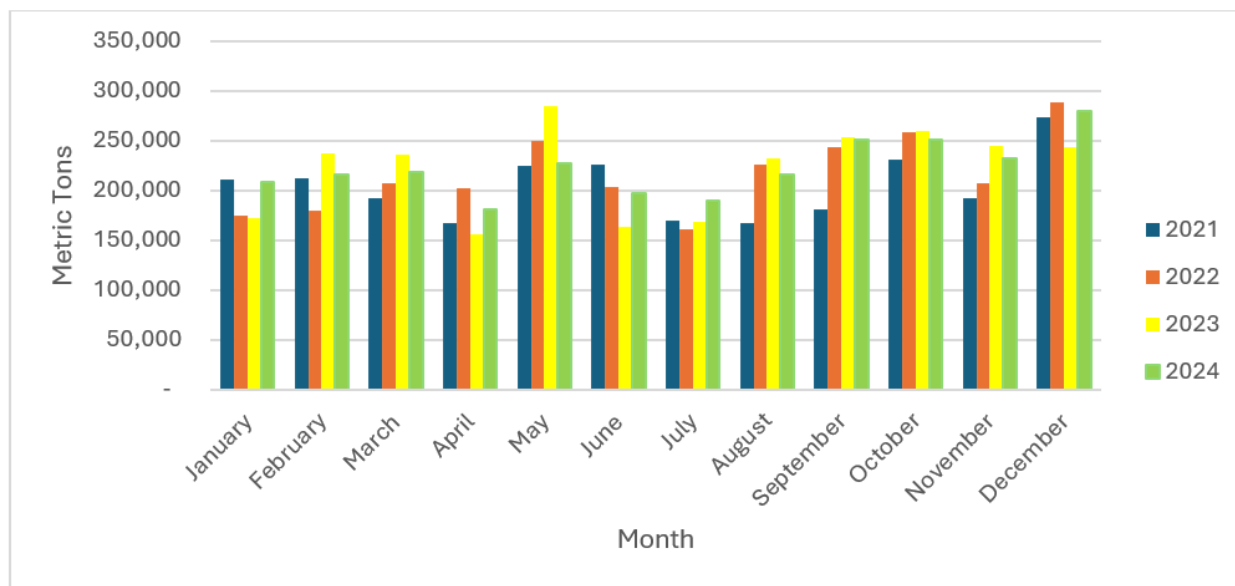
Data Source: SIAP

## Growing Conditions

Mexico's avocado sector flourishes due to its favorable growing conditions. The region's warm, subhumid climate, with temperatures ranging from 68°F to 77°F (20°C to 25°C), is ideal for avocado cultivation. Michoacán's location within the Trans-Mexican Volcanic Belt provides rich, well-draining soil covering more than 80 percent of the avocado planted area. Orchards are strategically situated at elevations between 3,940 and 7,545 feet (1,200 to 2,300 meters) above sea level. This altitude supports four overlapping bloom seasons, enabling year-round production. The area also benefits from an average annual rainfall of 64 inches (163 cm), with 61 percent of orchards relying on rainfall and 39 percent utilizing drip irrigation systems, which producers are increasingly adopting to improve water management.

Mexico produces virtually exclusively the Hass variety due to its cold hardiness, durability, texture, and taste. Producers reported overall good fruit weights for the 2024 crop, ranging from 8 to 13 ounces (250 to 350 grams). However, some growing areas faced elevated summer temperatures that reduced fruit quantity and weight.

**Graph 4: Monthly Avocado Harvest in Mexico**



Data Source: SIAP

## Consumption

According to data from Mexico's National Institute of Statistics and Geography, domestic avocado consumption is rising modestly, reaching 12 kilograms (27 pounds) per capita in 2024 from 11 kilograms (24 pounds) in 2023. Consumers can readily find fresh avocados in supermarkets and farmers markets across the country.

Despite its popularity, the avocado is considered a luxury commodity in Mexico due to its relatively high prices compared to other fruits. Consequently, avocados are not included in the basket of basic food products as defined by the Government of Mexico.

## **Trade**

### *Exports*

Avocado exports are forecast at 1.34 MMT in 2025, up five percent year-on-year to meet growing international demand, mostly from the United States. In 2024, estimated exports were 1.28 MMT, down nine percent compared to 2023 primarily due to increased logistical costs and harvest fluctuations. Exports to the United States reached 1.07 MMT in 2024, a five percent decrease from the previous year.

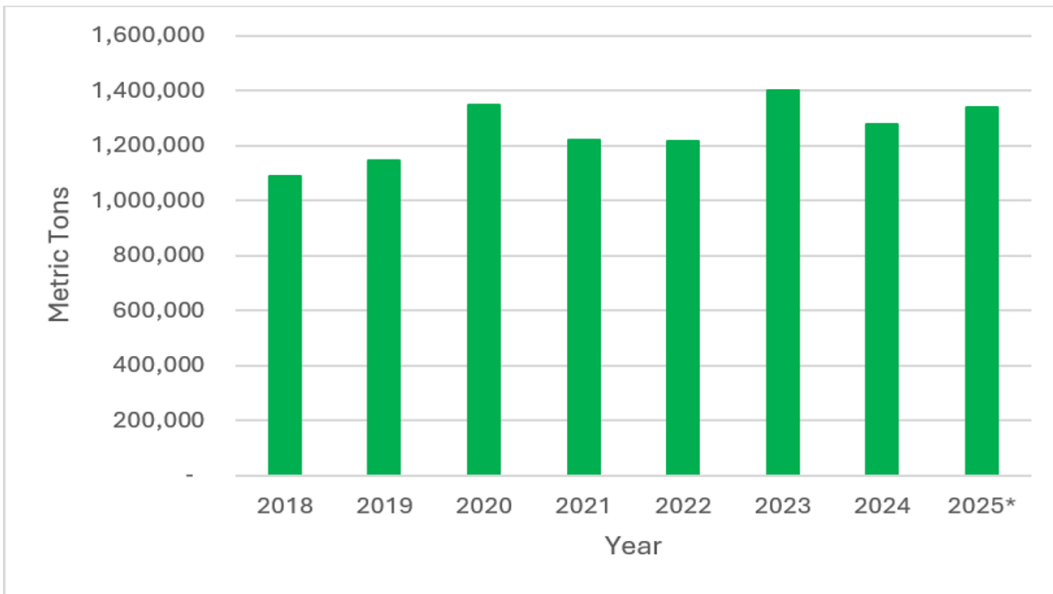
The U.S. market accounts for more than 80 percent of Mexico's total avocado exports by volume, followed by Canada (7 percent) and Japan (3 percent). While avocado exports are year-round, the peak season is from December to February (accounting for over 35 percent of exports), with the Super Bowl being the biggest demand driver for Mexico's avocado exports to the United States. Mexico supplied about 88 percent of total U.S. avocado imports in 2024.

Export markets generally prefer Hass avocados over other varieties due to taste, texture, and durability. In 2024, avocados ranked third among Mexico's agricultural exports, following beer and tequila, and ahead of berries and tomatoes.

Mexican avocados from approved orchards in the states of Michoacán and Jalisco are eligible for export to the United States. Producers and packing facilities participate in the bi-national Avocado Export Program, which is jointly administered and supervised by SENASICA and the USDA Animal and Plant Health Inspection Service (APHIS). This program is designed to identify and mitigate the risk of pest introductions before shipments arrive in the United States by taking preventative actions in Mexico.

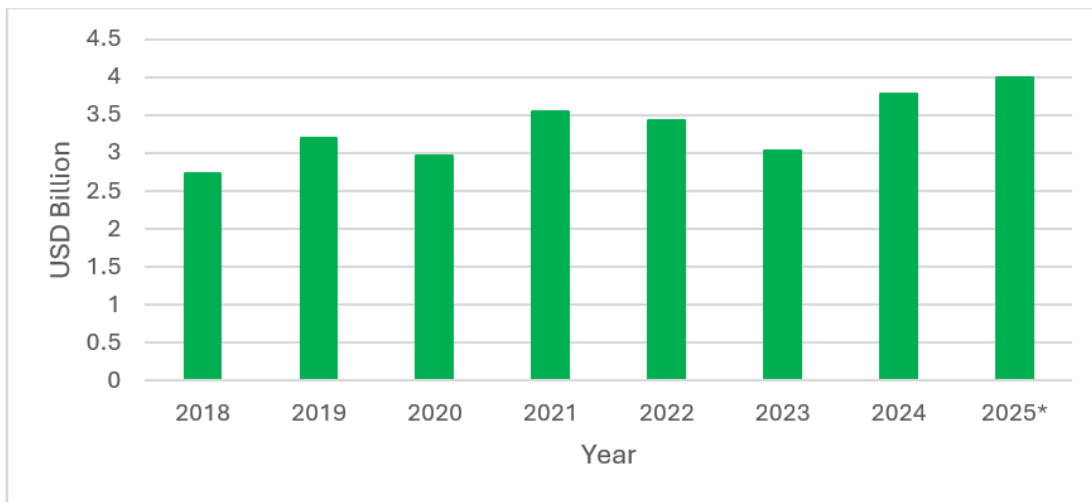
Beginning in July 2024, USDA changed their supervisory methodology for the certification of avocado orchards for export to the United States. Under this arrangement, USDA now remotely monitors the day-to-day orchard activities and performs audits as needed instead of being physically present in every orchard during the third-party certification. This allows USDA to focus on the program critical control points in the packing houses and provide a more strategic oversight of the entire program. SENASICA's third-party representatives continue their work of certifying the absence of invasive pests throughout harvesting and packing procedures. USDA personnel continue to oversee the avocado export program jointly with SENASICA. At the U.S. ports of entry, U.S. Customs and Border Protection still exercise the right to review any shipments to ensure compliance with program guidelines.

**Graph 5: Mexico Avocado Exports (Volume)**



Data source: SIAP  
\*Post Forecast

**Graph 6: Mexico Avocado Exports (Value)**



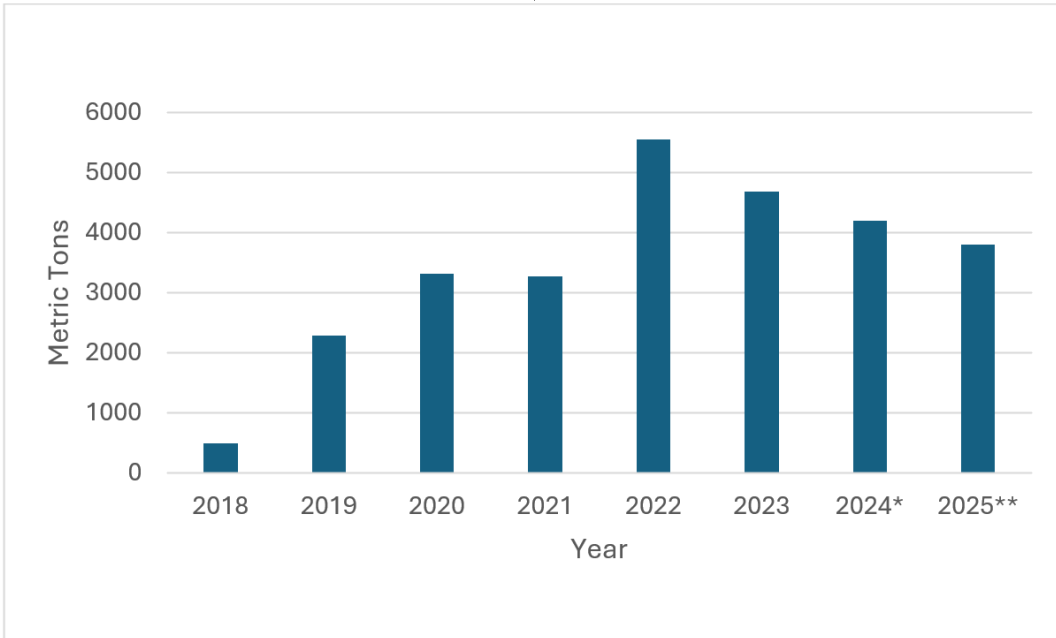
Data source: SIAP  
\*Post Forecast

### *Imports*

Mexico is not a major avocado importer, with imports coming mainly from Peru and Colombia to help meet domestic demand during seasonal low production periods. Imports are forecast at 3,800 MT in 2025, down from an estimated 4,200 MT in 2024 due to stable production growth and relatively moderate consumption growth. Imports have been declining in line with increasing domestic production

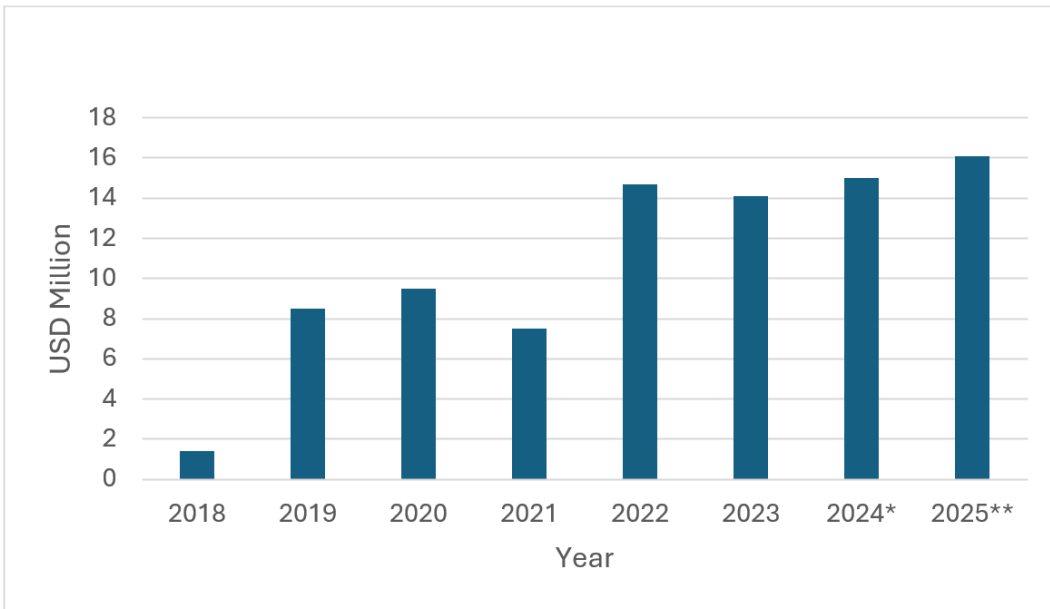
since a historic high of 5,550 MT in 2022, when reduced availability of water and other inputs limited production in the growing areas focused on supplying the domestic market, resulting in higher imports.

**Graph 7: Mexico Avocado Imports (Volume)**



\*Post Estimate  
\*\*Post Forecast

**Graph 8: Mexico Avocado Imports (Value)**



Data Source SIAP  
\*Post Estimate  
\*\*Post Forecast



## **Policy**

### *Deforestation-Free Agricultural Export Program*

On January 30, 2025, the Government of Mexico (GOM) announced a deforestation-free export initiative led by the Secretariats of Agriculture and Rural Development, Labor, and Environment. According to the GOM, the program aims to promote deforestation-free practices and formal employment within the agricultural export sector with an initial focus on the avocado value chain. The primary objective of the program is to ensure compliance with Mexican labor and environmental laws. At the time of publication of this report, the program had not yet been implemented.

### *Michoacán Deforestation-Free Certification Program*

On August 29, 2024, the state of Michoacán implemented a voluntary certification system aimed at addressing deforestation linked to avocado farming. According to state government officials, the system will provide environmental services compensation to producers who avoid deforestation. Certification is available to orchards that have not contributed to deforestation since January 2018, have been free from forest fires since 2012, and are situated outside natural protected areas. In conjunction with the implementation of the certification system, the Michoacán environment secretary announced that hundreds of high-priority environmental complaints had been filed with the Federal Attorney for Environmental Protection and the State Attorney General's Office about violations on orchards larger than 10 hectares, with as many as 500 additional complaints being prepared to address these issues.

### **Attachments:**

No Attachments.