

Required Report: Required - Public Distribution

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Report Name: Avocado Annual

Country: Chile

Post: Santiago

Report Category: Avocado

Prepared By: Sergio Gonzalez

Approved By: Amanda Hinkle

Report Highlights:

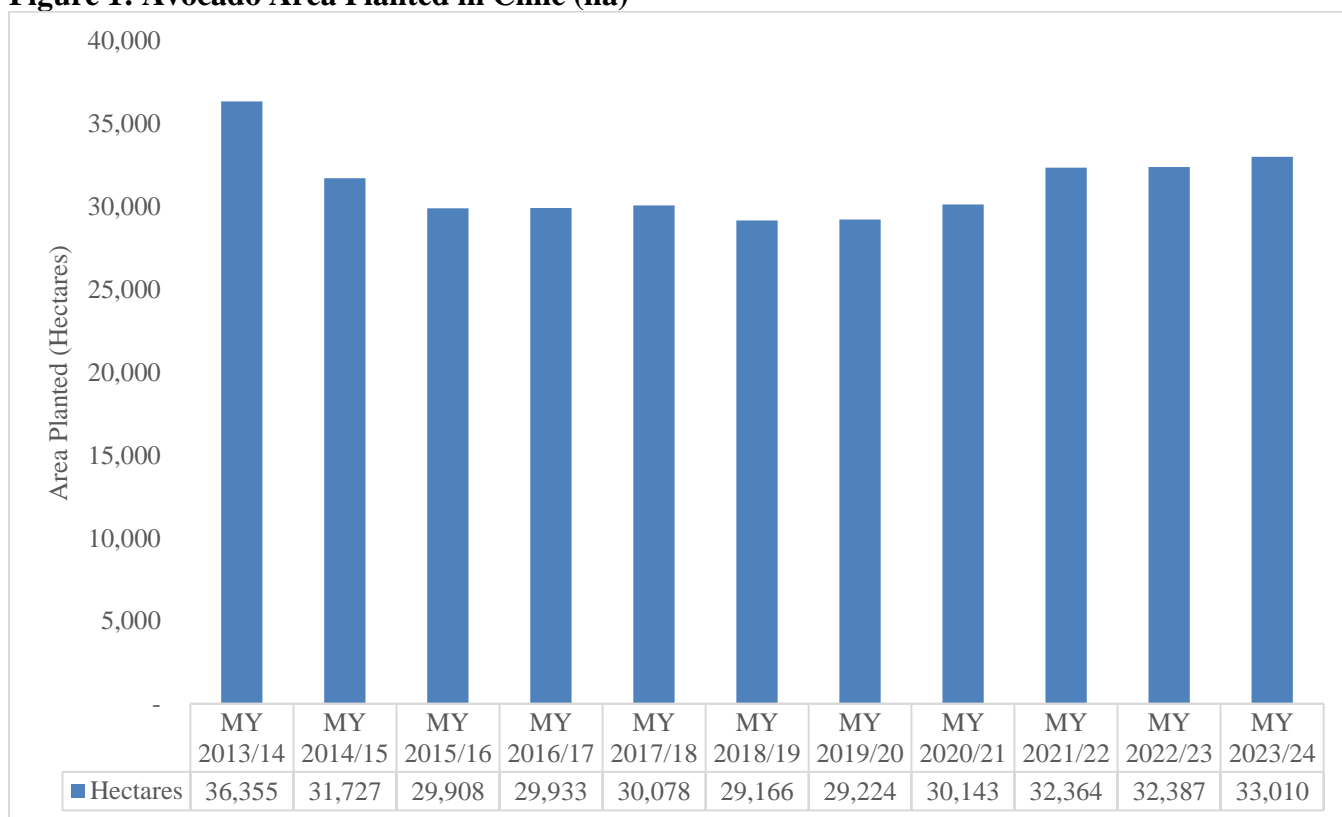
In marketing year (MY) 2024/25, due to favorable climatic conditions, avocado production is expected to total 200,000 metric tons (MT), representing a 33.3 percent increase from MY 2023/24. The area planted will total 33,010 hectares, reflecting a one percent growth from MY 2023/24. Exports for MY 2023/24 are estimated at 116,000 MT, a 29.8 percent increase over the previous marketing year due to higher production volumes. Imports are projected to decrease by 20 percent, totaling 55,000 metric tons. Chileans consume avocados daily and year-round, incorporating them into salads, sandwiches, and various other dishes available in foodservice. Top-quality avocados are primarily sold in retail, while lower-grade avocados are used in foodservice for sandwiches, hot dogs, and sushi.

Production

According to the Chilean Avocado Committee, in MY 2024/25, from July 2024 to June 2025, avocado production will total 200,000 MT, a 33.3 percent increase from the 150,000 MT produced in MY 2023/24. Post estimates that favorable climatic conditions and abundant rainfall during the winter will increase yields and overall production.

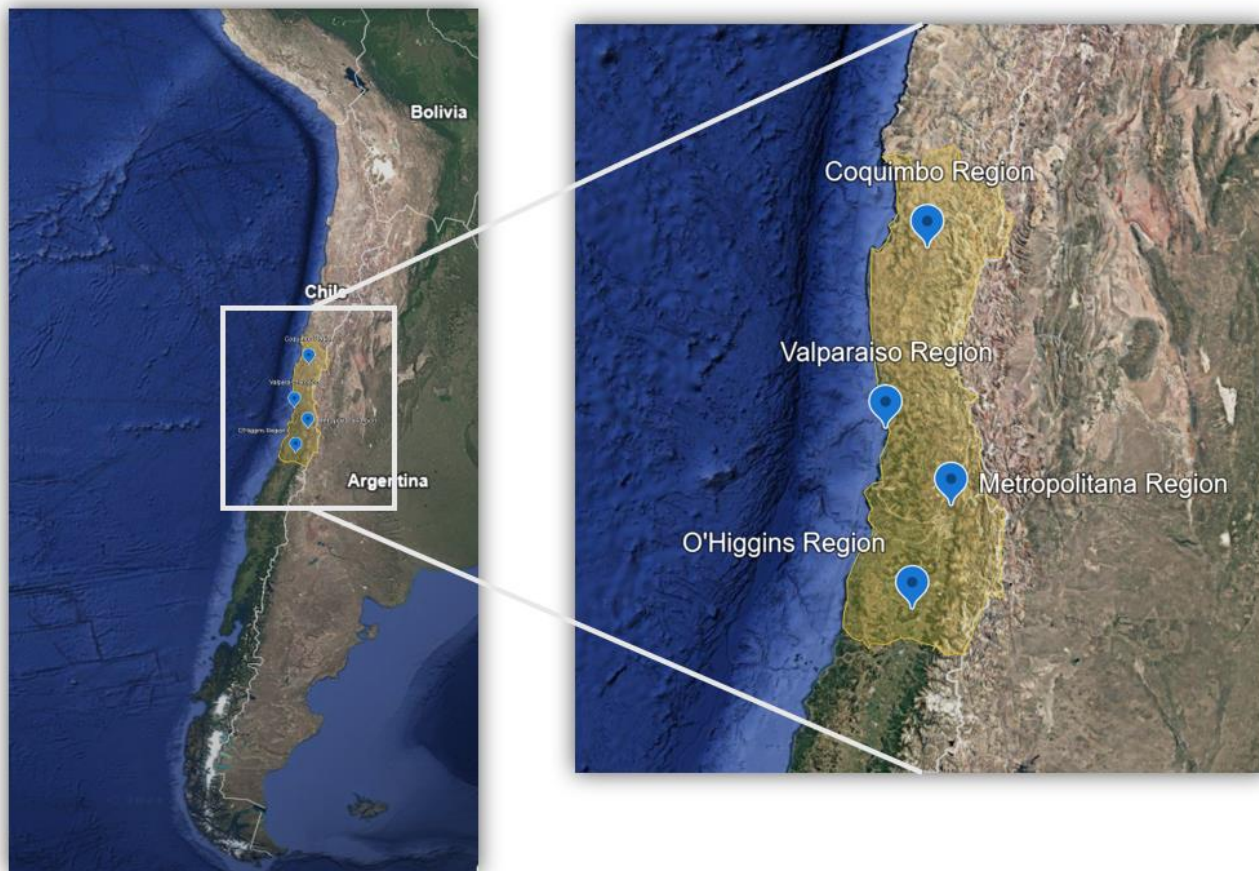
The Chilean avocado planted area reached 33,010 hectares (ha) in Marketing Year (MY) 2023/24 (see Figure 1). Post estimates that the area planted will increase to 33,340 hectares in MY 2024/25, representing a one percent growth from MY 2023/24. The planted area spans from the Coquimbo region in the northern part of Chile to the *O'Higgins* region in the central-south part of the country (see Map 1). The *Valparaiso* region is the top avocado-producing region with 20,434 hectares, accounting for 61.9 percent of the total area planted with avocados. The *Metropolitan*, *Coquimbo*, and *O'Higgins* regions also hold significant shares of the area planted with avocados. Over the past three marketing years, the avocado planted area has grown in all regions (see Table 1).

Figure 1: Avocado Area Planted in Chile (ha)



Source: Based on data from ODEPA

Map 1: Avocado Production Area in Chile



Source: FAS Santiago using Google Earth

Table 1: Avocado Area Planted by Region (ha)

Region	Area Planted (Hectares)	Three-Year Variation (%)	Share (%)
Coquimbo	4,041	1.4%	12.2%
Valparaíso	20,434	0.6%	61.9%
Metropolitana	4,736	12.0%	14.3%
O'Higgins	3,631	167.9%	11.0%
Others	168		0.5%
Total	33,010	9.5%	100.0%

*Variation of planted area is measured every third year; data provided are last available.

Source: Based on data from ODEPA

Hass is the main avocado variety produced in Chile. Consumers prefer *Hass* avocados for their creaminess and high oil content. However, *Hass* is sensitive to frost and excessive soil humidity, which limits its cultivation to hillsides and well-drained soils. Other avocado varieties produced in Chile in smaller quantities include *Edranol*, *Negra de la Cruz*, *Fuerte*, and *Bacon*.

Trade

Exports

In the first three months of MY 2024/25, exports increased by 66.5 percent over MY 2023/24. For MY 2024/25, Post estimates exports at 116,000 MT, a 29.8 percent increase from MY 2023/24 due to higher production (Table 2). In MY 2023/24, Chilean avocado exports increased by 1.1 percent in volume from MY 2022/23 totaling 89,346 MT and by 28.7 percent in value totaling \$230 million (Table 3).

In MY 2023/24, Chile's top export market for avocado was the Netherlands, followed by Spain, and the United Kingdom (UK). Chilean avocado exports peak between October and November along the bulk of the harvest (see Figure 2). Avocado exports from July to September 2024 were significantly higher than the previous year, reflecting the increase in production and yields in MY 2024/25.

Table 2: Chilean Avocado Export Volume (MT) to the World

Commodity: 080440, Avocados, Fresh Or Dried						
Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	July 23-Sep 23 (MT)	July 24-Sep 24 (MT)	Variation (%)
The World	88,413	89,346	1.1%	9,338	15,550	66.5%
Netherlands	29,413	27,696	-5.8%	2,809	3,505	24.8%
Spain	7,888	13,891	76.1%	473	1,420	200.2%
United Kingdom	13,097	11,776	-10.1%	1,450	1,346	-7.2%
Argentina	13,127	7,984	-39.2%	418	2,493	496.4%
China	7,525	7,726	2.7%	1,096	1,215	10.9%
Germany	4,964	5,062	2.0%	293	1,040	254.9%
United States	3,879	4,757	22.6%	2,364	3,000	26.9%
France	2,082	2,807	34.8%	22	342	1454.5%
Italy	1,846	2,547	38.0%	73	410	461.6%
South Korea	779	1,288	65.3%	0	0	
Others	3,813	3,812	0.0%	340	779	129.1%

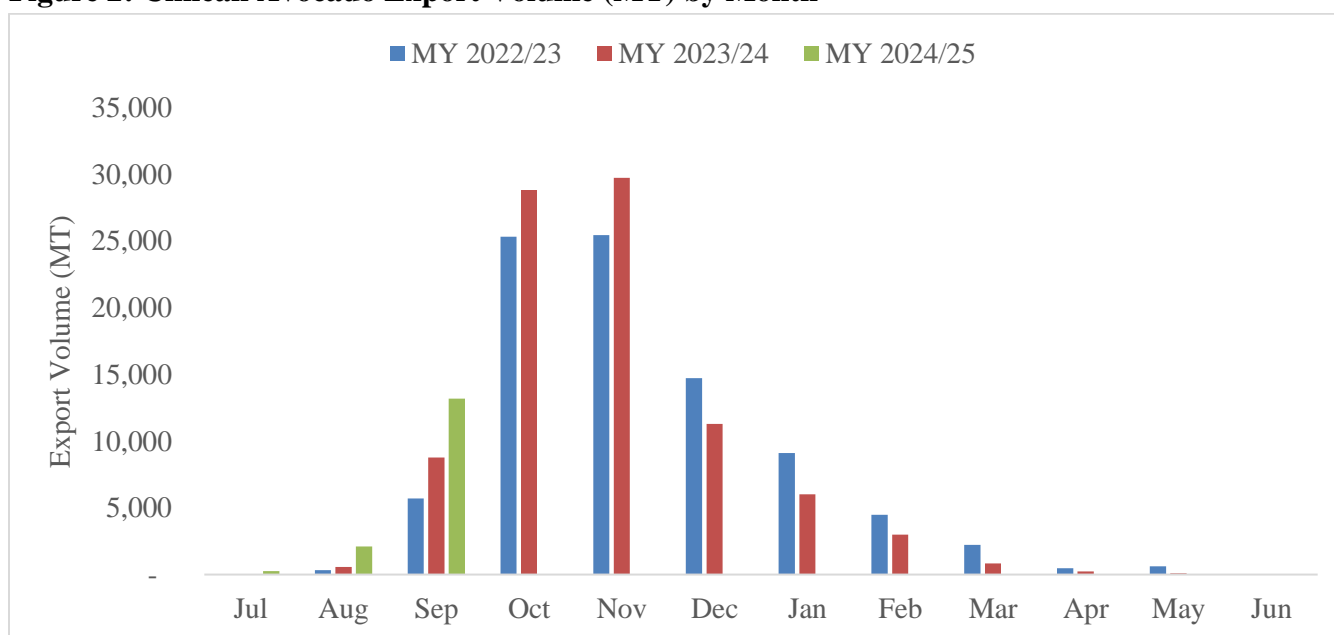
Source: Trade Data Monitor, LLC

Table 3: Chilean Avocado Export Value (USD) to the World

Partner Country	Marketing year			Year to Date		
	MY 2022/23 (USD)	MY 2023/24 (USD)	Variation (%)	July 23-Sep 23 (USD)	July 24-Sep 24 (USD)	Variation (%)
The World	178,443,493	229,714,479	28.7%	25,016,137	44,479,995	77.8%
Netherlands	44,316,673	62,978,730	42.1%	5,580,101	9,558,293	71.3%
Spain	13,372,770	33,269,144	148.8%	1,027,968	3,868,308	276.3%
United Kingdom	29,925,492	32,969,777	10.2%	3,981,218	4,313,138	8.3%
China	18,795,491	23,565,567	25.4%	3,376,295	3,899,265	15.5%
Argentina	35,957,604	23,552,262	-34.5%	1,199,229	6,355,733	430.0%
United States	9,742,157	15,582,229	59.9%	8,021,421	9,518,996	18.7%
Germany	7,860,141	9,310,841	18.5%	676,707	2,570,599	279.9%
Italy	4,924,879	8,680,610	76.3%	234,596	1,479,611	530.7%
South Korea	2,024,572	4,651,385	129.7%	0	0	
France	2,485,664	4,188,213	68.5%	55,320	565,031	921.4%
Others	9,038,050	10,965,721	21.3%	863,282	2,351,021	172.3%

Source: Trade Data Monitor, LLC

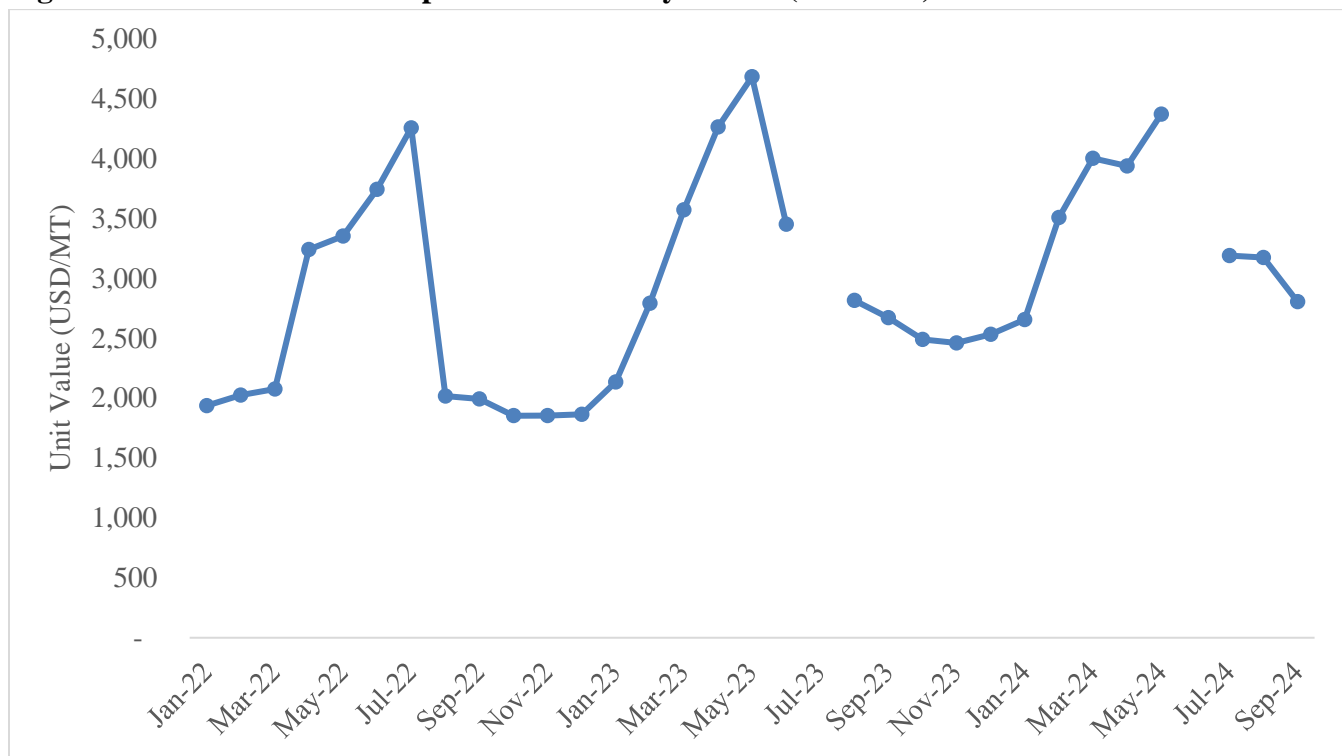
Figure 2: Chilean Avocado Export Volume (MT) by Month



Source: Trade Data Monitor, LLC

Figure 3 shows the unit value (USD/MT) for Chilean avocado exports by month. Export values peak from April to July each year, during the Chilean offseason when avocado supply is lower. In the beginning of MY 2024/25, July to September 2024, unit values were significantly higher than the previous marketing years, which is consistent with an increase in export value.

Figure 3: Chilean Avocado Export Unit Value by Month (USD/MT)



Source: Trade Data Monitor, LLC

In MY 2023/24, avocado imports decreased by 9.3 percent in volume but increased by 15.9 percent in value (Table 4 and Table 5). The main supplier of avocado to Chile is Peru with a 99 percent market share. Chile imports smaller quantities of avocado from Mexico and Colombia. Imports peak in June and July when there is no domestic production (see Figure 4).

Imports

In the first three months of MY 2024/25, imports decreased by 22.2 percent in volume in response to the higher domestic production. In MY 2024/25, due to high domestic production, Post estimates import volume at 55,000 MT, which represents a 20 percent decrease from MY 2023/24.

Table 4: Chilean Import Volume (MT) of Avocado from the World

Commodity: 080440, Avocados, Fresh Or Dried						
Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (MT)	MY 2023/24 (MT)	Variation (%)	July 23- Aug 23 (MT)	July 24- Sep 24 (MT)	Variation (%)
The World	75,710	68,694	-9.3%	24,677	19,202	-22.2%
Peru	75,084	67,700	-9.8%	24,413	19,139	-21.6%
Mexico	382	546	42.9%	0	0	
Colombia	111	394	255.0%	231	0	-100.0%
United States	0	21		0	0	
Argentina	23	18	-21.7%	18	42	133.3%
Brazil	14	16	14.3%	16	21	31.3%
Others	96	-	-100.0%	-	-	

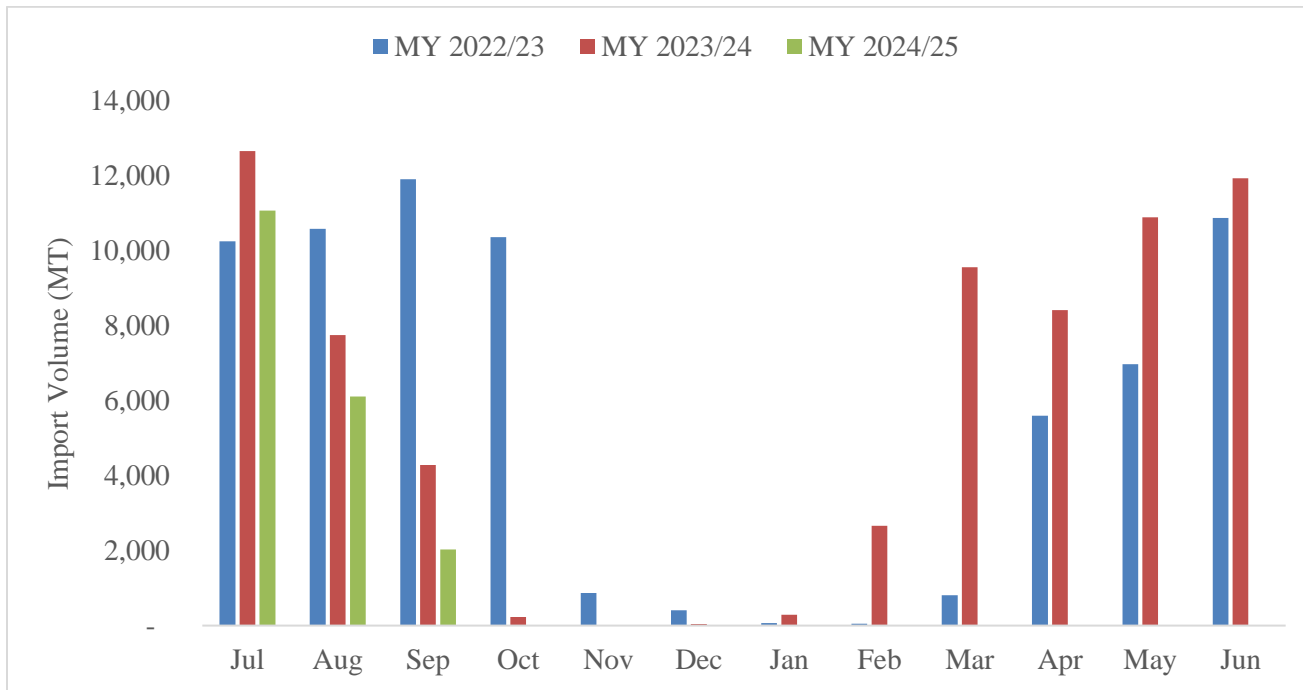
Source: Trade Data Monitor, LLC

Table 5: Chilean Import Value (USD) of Avocado from the World

Commodity: 080440, Avocados, Fresh Or Dried						
Partner Country	Marketing Year			Year to Date		
	MY 2022/23 (USD)	MY 2023/24 (USD)	Variation (%)	July 23- Aug 23 (USD)	July 24- Sep 24 (USD)	Variation (%)
The World	97,399,424	112,852,940	15.9%	34,182,836	34,715,362	1.6%
Peru	96,263,352	110,951,462	15.3%	33,826,382	34,603,725	2.3%
Mexico	850,736	1,244,300	46.3%	0	18	
Colombia	178,814	586,361	227.9%	319,954	512	-99.8%
United States	0	34,317		0	0	
Argentina	24,004	19,657	-18.1%	19,657	67,319	242.5%
Brazil	14,754	16,844	14.2%	16,844	43,789	160.0%
Others	67,764	-	-100.0%	-	-	

Source: Trade Data Monitor, LLC

Figure 4: Chilean Import Volume (MT) of Avocado by Month



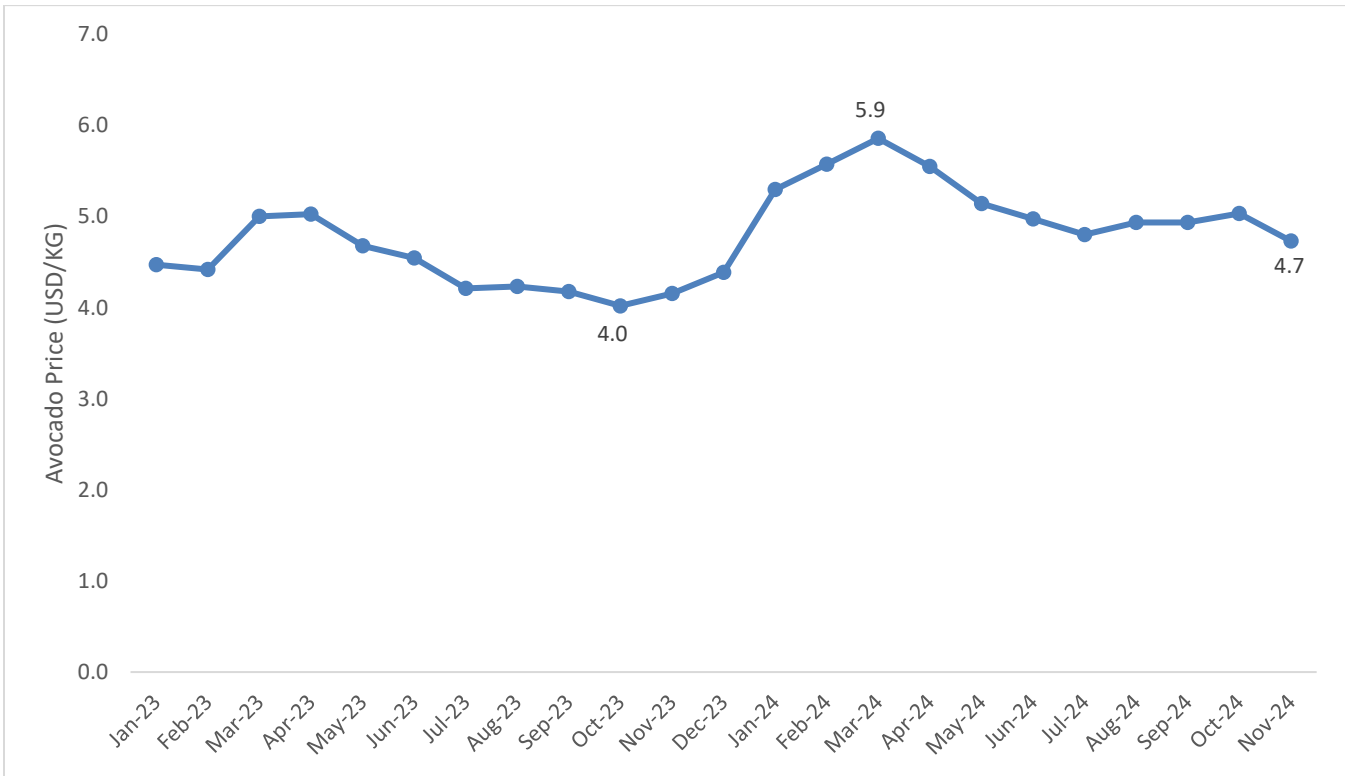
Source: Trade Data Monitor, LLC

Consumption

In MY 2024/25 Post estimates domestic consumption at 139,000 metric tons. Domestic consumption is supplied from 84,000 MT of domestic production and 55,000 MT of imports. After Mexico, Chile has the second largest per capita consumption level. Domestic demand for avocados is high as Chileans consider them a staple in their diets. The food service industry also incorporates avocados into various products such as sandwiches, hot dogs, and sushi. Generally, larger, defect-free avocados are sold in retail, while smaller ones are used by foodservice.

Since there is a high demand for avocado, domestic price is high and competitive compared to export price. Avocado prices are higher during the offseason around April and May each year (Figure 5). Prices are usually from \$4.00 USD per kilogram (kg) to \$4.50 USD per kg, but they can reach values as high as \$5.9 USD per kg when the avocado supply is low.

Figure 5: Avocado Average Consumer Price by Month in Chile (USD/KG)



Source: Based on data from ODEPA

Policy

No policy updates to report.

Attachments:

No Attachments