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Report Name: Peruvian Avocado Exports Expected to Bounce Back

Country: Peru

Post: Lima

Report Category: Agricultural Situation, Agriculture in the Economy

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Report Highlights:

Peruvian avocado exports are estimated to reach 630,000 metric tons (MT) in calendar year (CY) 2025, increasing two percent compared to the previous year. Avocado exports in 2024 decreased four percent from to 2023, totaling 594,000 MT a decline due to unusual cold weather conditions reducing productivity. Production is expected to bounce back, but a potential La Niña is looming on the Peruvian coast and may reduce avocado production in CY 2025 despite an expansion of planted area.

Table 1. Production, Supply, and Distribution of Avocados.

Fresh Avocados: 080440	2023	2024	*2025**
Area Planted (Ha.)	67,000	70,000	*73,000*
Area Harvested (Ha.)	65,000	67,000	*70,000*
Area Certified for Exports (Ha)	48,000	53,000	*55,000*
Production (Thousand MT)	813	804	844
Imports (Thousand MT)	0	0	*0*
Total Supply (Thousand MT)	813	804	*844*
Fresh Dom. Consumption (Thousand MT)	194	214	*214*
Exports (Thousand MT)	619	590	*630*
Export to the US (Thousand MT)	90	74	
Total Distribution (Thousand MT)	813	804	*844*

*FAS Lima forecast

Production:

Avocado production in CY 2025 is estimated at 844,000 MT. Peru produces mainly two types of avocados: Hass and *Fuerte*. Hass represents 95 percent of Peru's avocado exports. *Fuerte*, also known as green variety, is destined for local consumption. In 2024, the land under avocado production was estimated at 70,000 hectares (ha.); of which 53,000 were certified for exports. Production is expected to recover slightly in 2025, especially with trees maturing over the next three years and alterations in rainfall patterns.

In 2024, total production declined two percent due to unusual 2023 weather conditions like heavy rains, and high temperatures that affected the 2024 harvest. The biological cycle for avocados was disrupted by an extreme UV index, high winds, and excessive solar radiation. Yield per hectare is estimated at 12 MT. According to Peru's Ministry of Agriculture Development and Irrigation (MIDAGRI) all regions but one (Tumbes) up north, produce avocado (**Figure 1).** The regions of La Libertad, Lambayeque, Lima, and Ica account for 75 percent of total Hass avocado production **(Figure 2).**

Figure 1. Peruvian Avocado Production Regions

Source: MIDAGRI Statistics

Figure 2. 2024 Hass Avocado Planted Area (%)

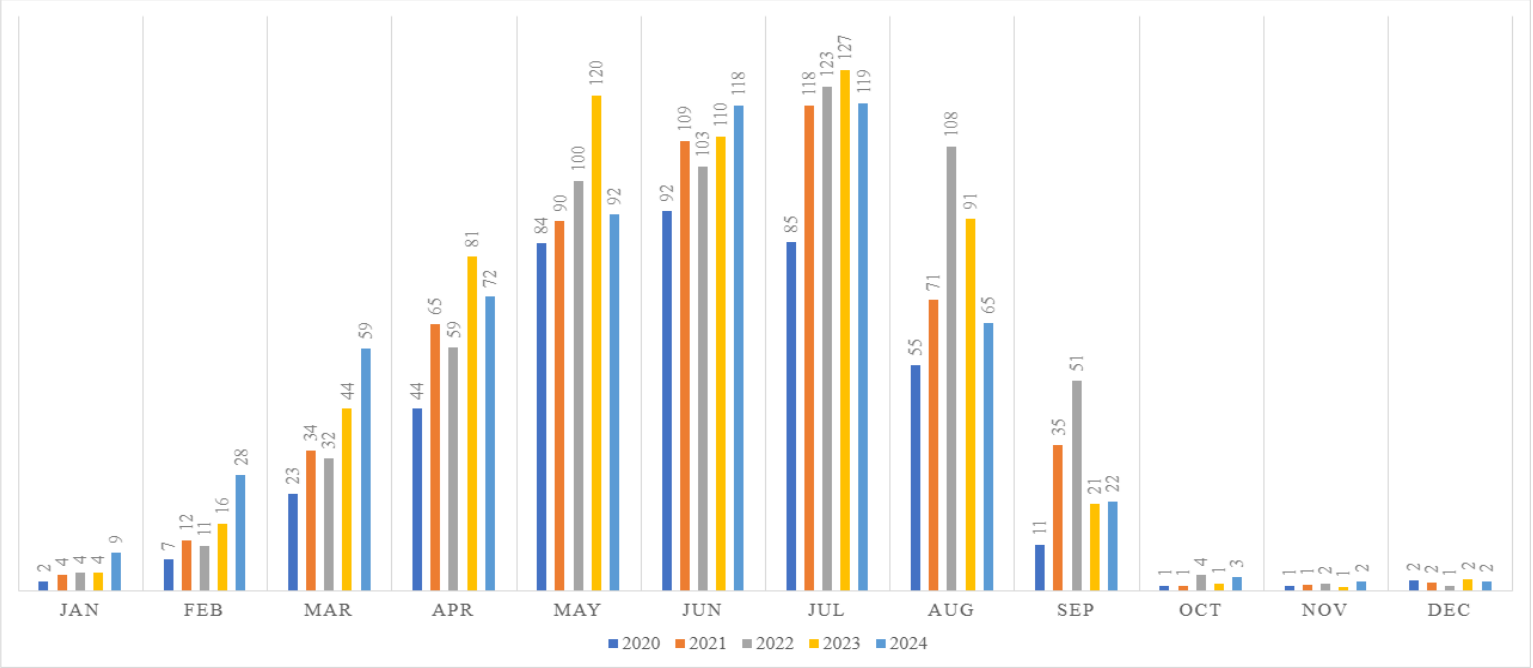
Source: Hass Avocado Producers of Peru (ProHass)

Peruvian avocado is a year-round crop and needs a consistent supply of water. Avocado grove establishment requires staking the trees to support growth and hardy rootstock like Ashdot and Deganya for local varieties and Ferchaild for Hass. Farmers look for rootstocks that tolerates Oomyceto, Phytophthora cinnamomi, with salinity resistance, and high performance. This practice extends the life and productivity of the tree. The avocado tree life cycle is 25 years with fruit harvested at year two for the Hass variety and year three for the *Fuerte* variety.

According to official data, there are 28 thousand producers of Hass avocado and 94 percent are small-scale farmers (less than 5 ha.) representing 30 percent of total area in production. Hass avocado farming happens on the coast and the highlands. The highland area represents 14 percent of total area, with an annual growth rate of 14 percent in the last 10 years, a higher growth rate than the nine percent in for coastal production. Early avocado production is growing in the highlands where small-scale farming plays a key role in the supply.

Figure 3 shows the distribution of avocado exports over the last five years. Peru endeavors to provide consistent product for global supply chains and not only for establishing Peru avocados as a brand, but also to maintain their share of the market, especially the new growing Asian market. This requires strengthening quality standards and enforcement of those standards. This includes adhering to harvest triggers of around 21.5 percent of dry versus water matter content in the fruit, a key indicator of fruit maturation that contributes to product quality with good texture and firmness when shipments arrive to the port of destination.

Figure 3. Peruvian Avocado Export Seasonality (2020-2024) in Thousand MT



Source: Peruvian Customs Service (SUNAT)

In CY 2025, the unpredictable weather might be responsible for the slowdown in the production growth despite the increase of harvest areas. Current conditions indicate that Peruvian coastal waters are colder, indicating that La Niña the weather phenomenon, could develop in the coming months.

Cooler conditions may impact flowering and result in less fruit production for 2026. Avocado trees require an abundant amount of water - an average of 2,600 liters per year for a one-to-two-year-old tree, and 7,800 liters for older trees. Production is highly sensitive to temperature increases and to drought. Moreover, avocado trees require humidity above 50 percent, even in the dry season.

Eighty six percent of the avocado production for exports in Peru is located along the desert coast. Larger-scale producers that represent 50 percent of total export production utilize water sourced from the Andes via state-of-the-art irrigation systems supporting the exponential rise of avocado production over the last 25 years with a 26 percent annual growth average. Drip irrigation is applied using a combination of sensors, sophisticated controllers, and customized software.

Consumption:
The domestic consumption of avocado in Peru is estimated at 214,000 MT. Peru's consumption per capita is estimated at seven kilograms. Peruvians prefer green skin local varieties, like *Palta Fuerte*. PROHASS, the Hass Avocado Producers of Peru, conducts marketing programs to increase domestic Hass avocado consumption at local supermarkets.

Peruvian avocados provide a year-round supply in the domestic market. According to Ministry of Agriculture data, Peru produces 10 types of avocados: *Criollo*, *Dedo*, *Ettinger*, *Fuerte*, *Hall*, Hass, *Naval*, *Queen*, *Villa Campa*, and *Zutano*, with all destined for the domestic market. Hass and *Fuerte* are still the most commercial avocados in Peru. On average, in CY 2024 (see **Table 2**), prices are 12 percent higher in the domestic market in comparison with last year. Dedo is the variety with the highest price but provides minimal volumes in the domestic market followed by *Fuerte*.

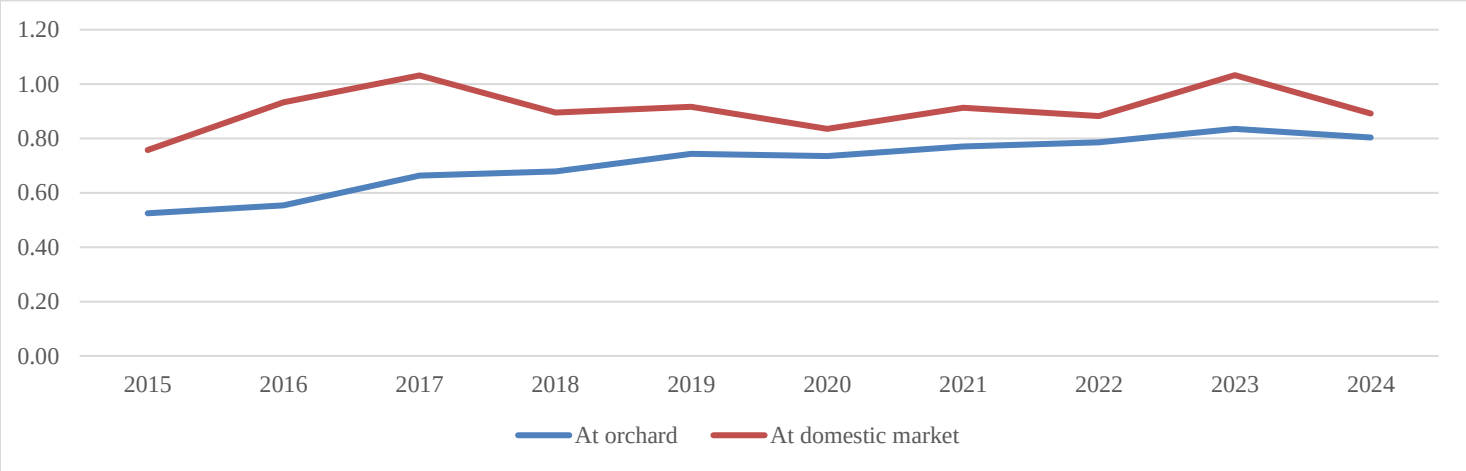
Table 2. Average Prices of Avocado per Kilogram in US $ dollars at local market

CY	Criollo	Dedo	Ettinger	Fuerte	Hall	Hass	Naval	Queen	Villa Campa	Zutano
2024	0.58	1.32	0.88	1.26	0.59	1.00	0.95	1.08	1.11	0.71
2023	0.52	1.44	0.86	1.38	0.54	0.90	1.29	1.24	1.33	1.14
2022	0.52	1.31	0.75	1.30	0.54	0.84	1.00	0.98	1.06	1.14
2021	0.54	1.31	-	1.46	0.56	1.13	1.09	1.07	1.18	1.22

Source: Peruvian Ministry of Agriculture Prices System

Local farm prices (paid at the orchard) are trending upward with growing domestic and export demand, but recently the gap between farm prices and domestic wholesalers/retailers narrowed (**Figure 4**). This was likely due to increased fuel costs, poor road conditions, and shipping delays from port congestion during the 2024 peak harvest months from May through August. These factors increased costs, and shrunk the margins, of avocado wholesalers, retailers, and traders.

Figure 4. Average Prices Comparison per Kilogram in US $ dollars (2015-2024)

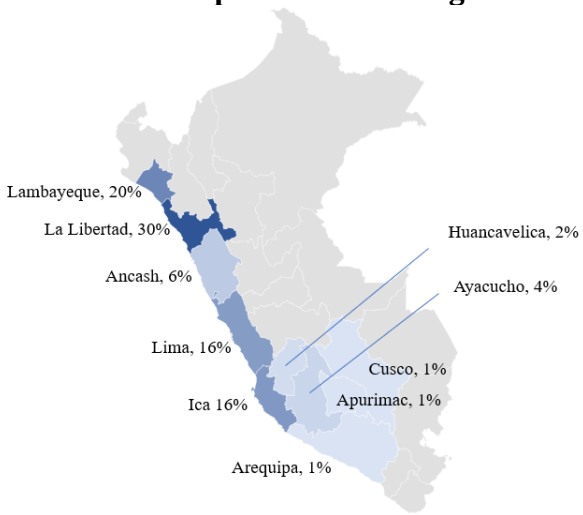


Source: Peruvian Ministry of Agriculture Prices System

Trade:

Peruvian avocado exports are estimated at 630,000 MT in CY 2025, an increase of six percent compared to the previous year. Avocado exports in 2024 decreased five percent compared to 2023, reaching 590,000 MT. The Peruvian phytosanitary authority (SENASA) certifies the avocado farms that meet export protocols, currently at 53,000 ha. **Figure 5** shows the SENASA certified production area of Peruvian avocados allowed for export, which is trending upward as SENASA brings more farms into export compliance. Hass avocados are the only variety exported to the United States and SENASA is in technical negotiations to expand trade in other Peruvian varieties.

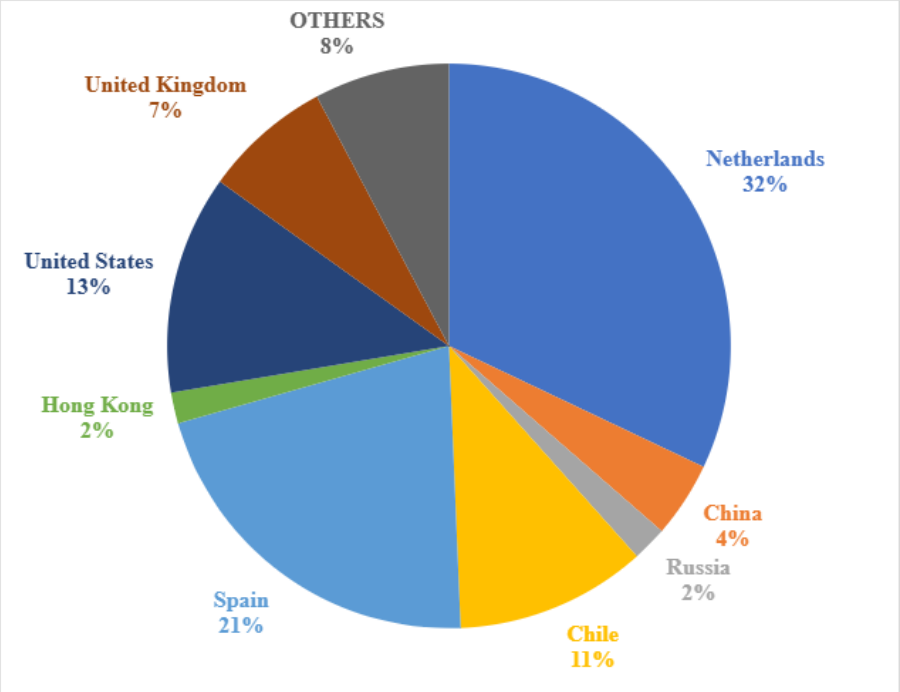
Figure 5. 2024 Avocado Certified Area for Exports in Percentage



Source: Hass Avocado Producers of Peru (ProHass)

International avocado prices in 2024 were up to $2.17 from $1.70 per kilogram in 2023 driven by the European Union (EU). Peruvian avocado exports to the world decreased in 2024. U.S. shipments fell 10 percent but increased 14 percent by value to $179 million from only 74,000 MT shipped. U.S. market ranked third as an export destination for Peruvian avocados after the Netherlands and Spain.

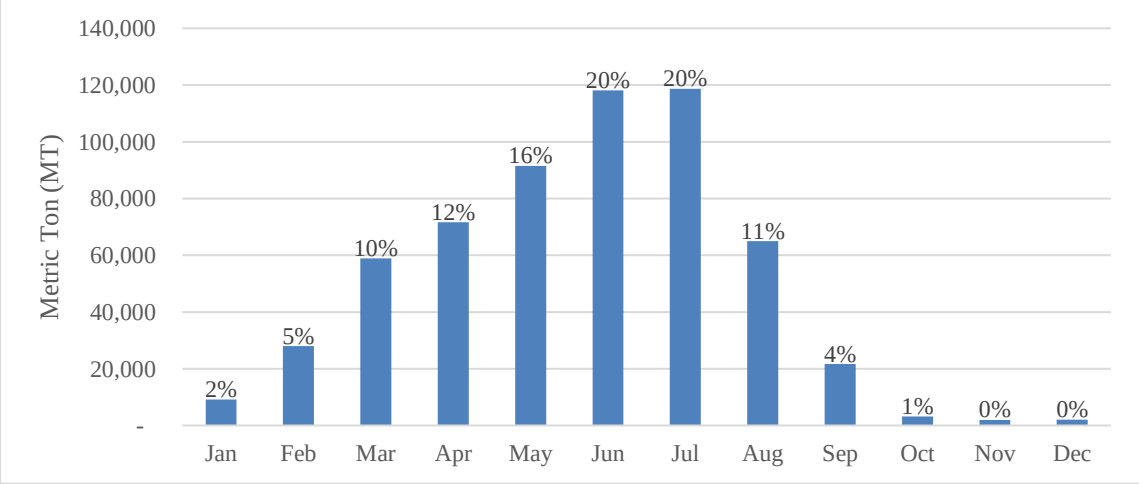
Figure 6. 2024 Export Destinations of Peruvian Avocado



Source: Peruvian Customs Service (SUNAT)

The chart below illustrates that most of Peru's avocado exports in 2024 occurred between the months of March and August.

Figure 7. 2024 Annual Distribution of Peruvian Avocado Harvest Season in Percentage



Source: Peruvian Customs Service (SUNAT)

Policy:
Trade agreements were the catalyst to Peruvian avocado exports expanding at 26 percent average growth per year over the past 24 years, increasing from 2,209 MT in 2000 to 590,000 MT in 2024. In value, avocado exports showed exponential growth from $2 million to $1.3 billion. Peru has 22 trade agreements in place - including the U.S., EU and China - and access for its avocados to 60 countries. Currently, Peru is working to open markets in Mexico, Vietnam, Philippines, Taiwan, Australia and New Zealand. In 2024, Malaysia granted Peru avocado access after 10 years of negotiations.

Key factors leading Peru's avocado expansion include a competent authority effectively administering trade protocols, dry coastal weather, adequate soil conditions, irrigation infrastructure, affordable labor, and ample public/private investment. The Agricultural Promotion Law since 2000 positively enabled greater investment and favorable tax structures to boost private sector efforts at expanding operations for export-oriented agricultural products. In December 2020, however, the law was revoked as a result of farm worker unrest and protests. A new Law 31110 levies tax rates for agricultural operations equal to other sectors of the economy reducing competitiveness and providing additional benefits to workers. Peru's Congress is revisiting the Agrarian Law to pass legislation that accelerates investment with additional support to small-scale farming.

In 2024, six shipments of Hass avocados were rejected in the EU, Peru's largest global avocado export market, for exceeding the maximum cadmium content of 0,05 mg/kg - ppm. The Hass Avocado Producers of Peru (ProHass) in collaboration with the National Agricultural University (*La Molina*) initiated a nationwide mapping exercise in 2025 to identify the cadmium affected production areas through data collection on watersheds, soils, and fruit samples to understand the magnitude of the problem and propose corrective actions.

Figure 8. Hass and Fuerte Avocado Variety

Source: 2025 Wong supermarket website

Figure 9. Overview of Avocado Farm in the Ica region (early October 2024)

Source: FAS Lima

Figure 10-12. Avocado flower stage in the Ica valley (early October 2024)

Source: FAS Lima

Attachments:
No Attachments.