

Required Report: Required - Public Distribution

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Report Name: Avocado Annual

Country: Chile

Post: Santiago

Report Category: Avocado

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Report Highlights:

In marketing year (MY) 2024/25, favorable climatic conditions and abundant rainfall boosted avocado production to 240,000 metric tons (MT), a 60 percent increase from MY 2023/24. Post expects MY 2025/26 production to remain unchanged at 240,000 MT. The planted area remains stable at 33,025 hectares, with the Valparaíso region accounting for 61.9 percent of total production. In MY 2024/25, exports surged to 134,255 MT, a 50.3 percent increase, driven by strong demand from markets such as Argentina, the Netherlands, and Spain, while imports declined by 27.6 percent due to higher domestic supply. Chileans maintain high per capita avocado consumption, incorporating avocados into daily meals and foodservice offerings like sandwiches and sushi, with prices remaining competitive due to increased supply.

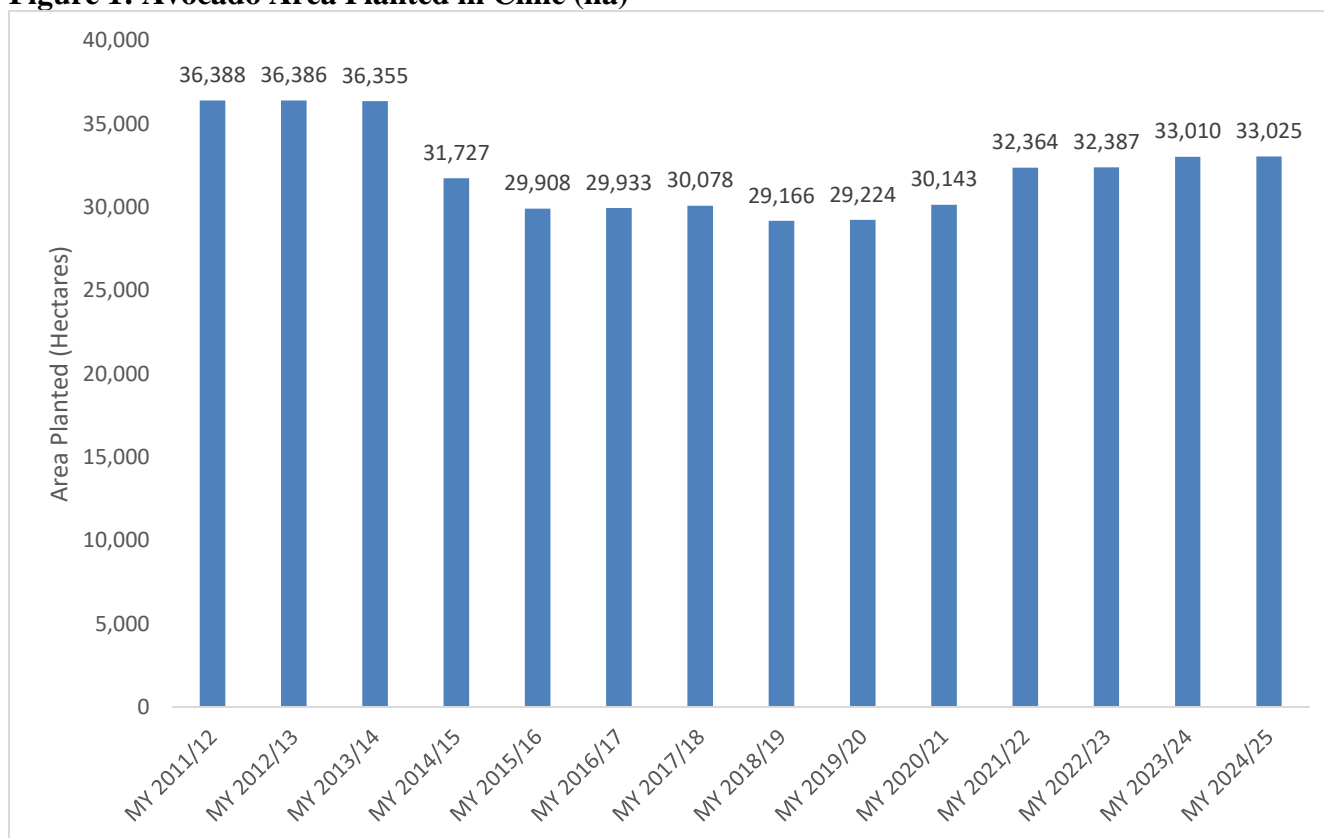
Production

In MY 2024/25, avocado output in Chile experienced a significant recovery despite the persistence of a multi-year drought. Favorable winter conditions, including well-distributed and above-average rainfall, contributed to improved yields and higher overall production. According to the Chilean Avocado Committee, in MY 2024/25, from July 2024 to June 2025, avocado production reached 240,000 MT, a 60 percent increase from the 150,000 MT produced in MY 2023/24.

In MY 2024/25, the Chilean avocado area planted totaled 33,025 hectares (ha), virtually unchanged from the previous marketing year (see Figure 1). In MY 2025/26, production is expected to remain unchanged and reach 240,000 MT, assuming high yields and no changes in area planted.

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 *Valparaíso* 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).

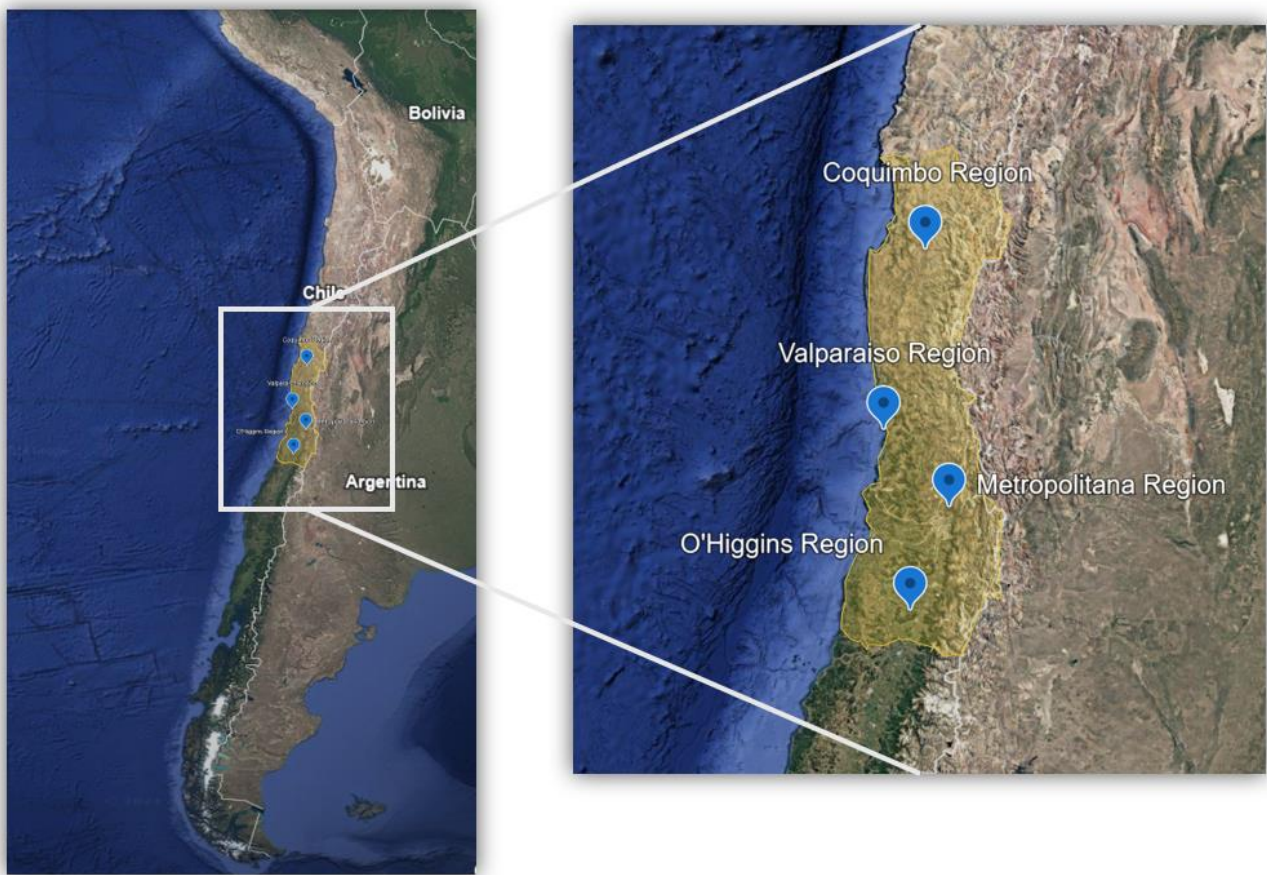
Figure 1: Avocado Area Planted in Chile (ha)



Source: Based on data from ODEPA

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*.

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	3,016	-25.4%	9.1%
Valparaíso	20,434	0.6%	61.9%
Metropolitana	4,736	12.0%	14.3%
O'Higgins	4,561	25.6%	13.8%
Others	278		0.8%
Total	33,025	2.0%	100.0%

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

Source: Based on data from ODEPA

Trade

Exports

In MY 2024/25, Chilean avocado exports reached 134,255 MT, a 50.3 percent increase compared to the 89,346 MT exported in MY 2023/24. Export volumes in the first three months of MY 2025/26 totaled 15,232 MT, two percent lower than the 15,550 MT exported during the same period in MY 2024/25 (Table 2).

Chile's top export markets in MY 2024/25 include by Argentina (21.7 percent), which accounted for 21.7 percent of total exports, the Netherlands (19.1 percent), Spain (12.3 percent), and the United Kingdom (11.3 percent) (Table 2). Export values also saw substantial growth. In MY 2024/25, Chilean avocado exports reached \$364.4 million, a 58.6 percent increase compared to the \$229.7 million recorded in MY 2023/24 (Table 3).

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

Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (MT)	MY 2024/25 (MT)	Variation (%)	Jul 24 - Sep 24 (MT)	Jul 25 - Sep 25 (MT)	Variation (%)
The World	89,346	134,255	50.3%	15,550	15,232	-2.0%
Argentina	7,984	29,070	264.1%	2,493	5,129	105.7%
Netherlands	27,696	25,594	-7.6%	3,505	3,707	5.8%
Spain	13,891	16,477	18.6%	1,420	1,662	17.0%
United Kingdom	11,776	15,120	28.4%	1,346	1,688	25.4%
United States	4,757	11,610	144.1%	3,000	0	-100.0%
China	7,726	8,934	15.6%	1,215	438	-64.0%
Germany	5,062	8,077	59.6%	1,040	1,240	19.2%
Italy	2,547	5,113	100.7%	410	361	-12.0%
France	2,807	2,843	1.3%	342	341	-0.3%
Uruguay	1,259	2,288	81.7%	256	366	43.0%
South Korea	1,288	2,285	77.4%	0	0	
Costa Rica	193	1,878	873.1%	72	48	-33.3%
Switzerland	901	1,090	21.0%	69	0	-100.0%
Australia	0	1,086		0	0	
Brazil	194	856	341.2%	38	10	-73.7%
Others	1,265	1,934	52.9%	344	242	-29.7%

Source: Trade Data Monitor, LLC

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

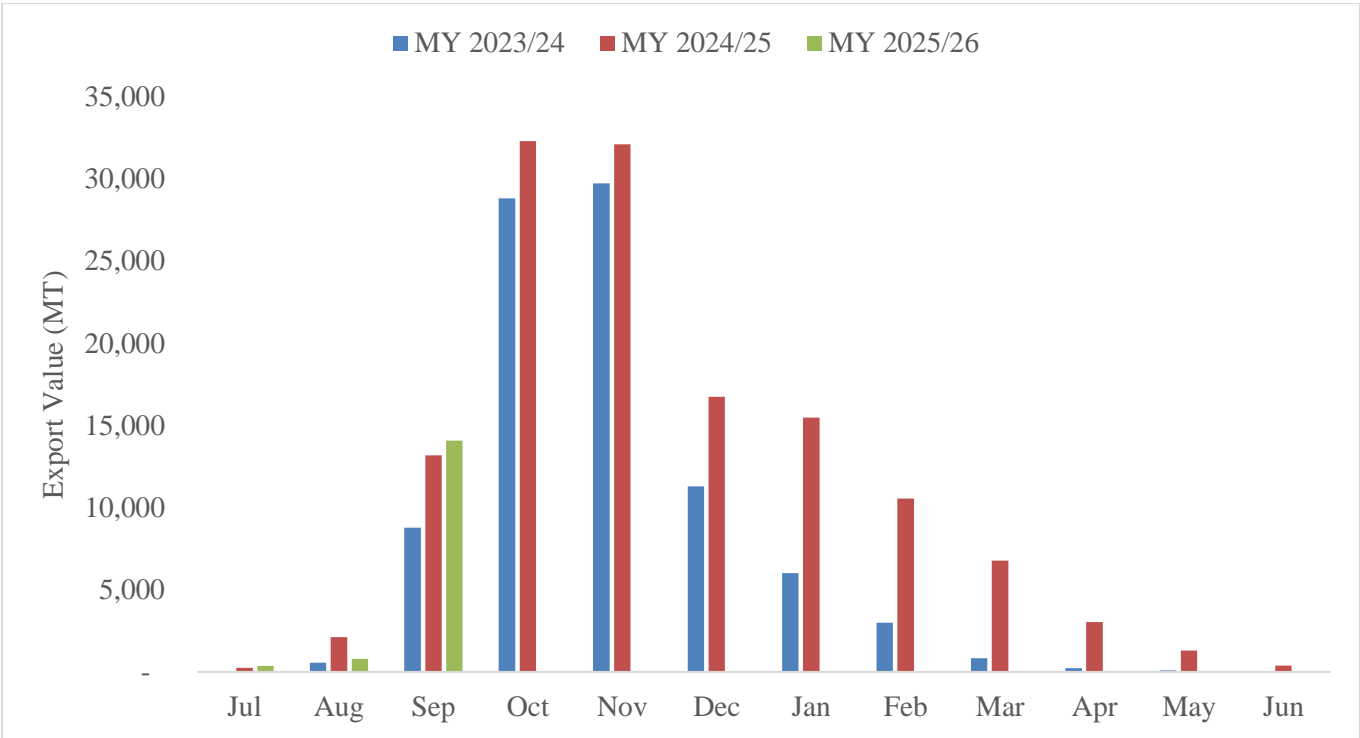
Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (USD)	MY 2024/25 (USD)	Variation (%)	Jul 24 - Sep 24 (USD)	Jul 25 - Sep 25 (USD)	Variation (%)
The World	229,714,479	364,441,692	58.6%	44,479,995	38,572,349	-13.3%
Argentina	23,552,262	72,948,342	209.7%	6,355,733	12,939,172	103.6%
Netherlands	62,978,730	61,469,856	-2.4%	9,558,293	7,998,643	-16.3%
United Kingdom	32,969,777	45,265,577	37.3%	4,313,138	4,979,434	15.4%
Spain	33,269,144	40,702,795	22.3%	3,868,308	4,815,113	24.5%
United States	15,582,229	38,201,263	145.2%	9,518,996	0	-100.0%
China	23,565,567	26,907,655	14.2%	3,899,265	1,204,707	-69.1%
Germany	9,310,841	20,536,003	120.6%	2,570,599	2,806,346	9.2%
Italy	8,680,610	16,710,873	92.5%	1,479,611	1,149,864	-22.3%
South Korea	4,651,385	8,154,040	75.3%	0	0	
Costa Rica	691,008	6,951,365	906.0%	273,768	162,132	-40.8%
Uruguay	3,866,564	6,337,590	63.9%	765,226	973,497	27.2%
France	4,188,213	5,167,695	23.4%	565,031	811,645	43.6%
Australia	0	3,798,094		0	0	
Switzerland	2,286,669	3,471,819	51.8%	66,941	0	-100.0%
Belgium	1,818,902	2,584,107	42.1%	398,048	474,311	19.2%
Others	2,302,578	5,234,618	127.3%	847,038	257,485	-69.6%

Source: Trade Data Monitor, LLC

Chilean avocado exports peak between October and November, coinciding with the bulk of the harvest (see Figure 2). In August 2025, avocado exports were slightly lower than the previous year, while in September 2025, they were slightly higher, reflecting expectations of relatively stable yields.

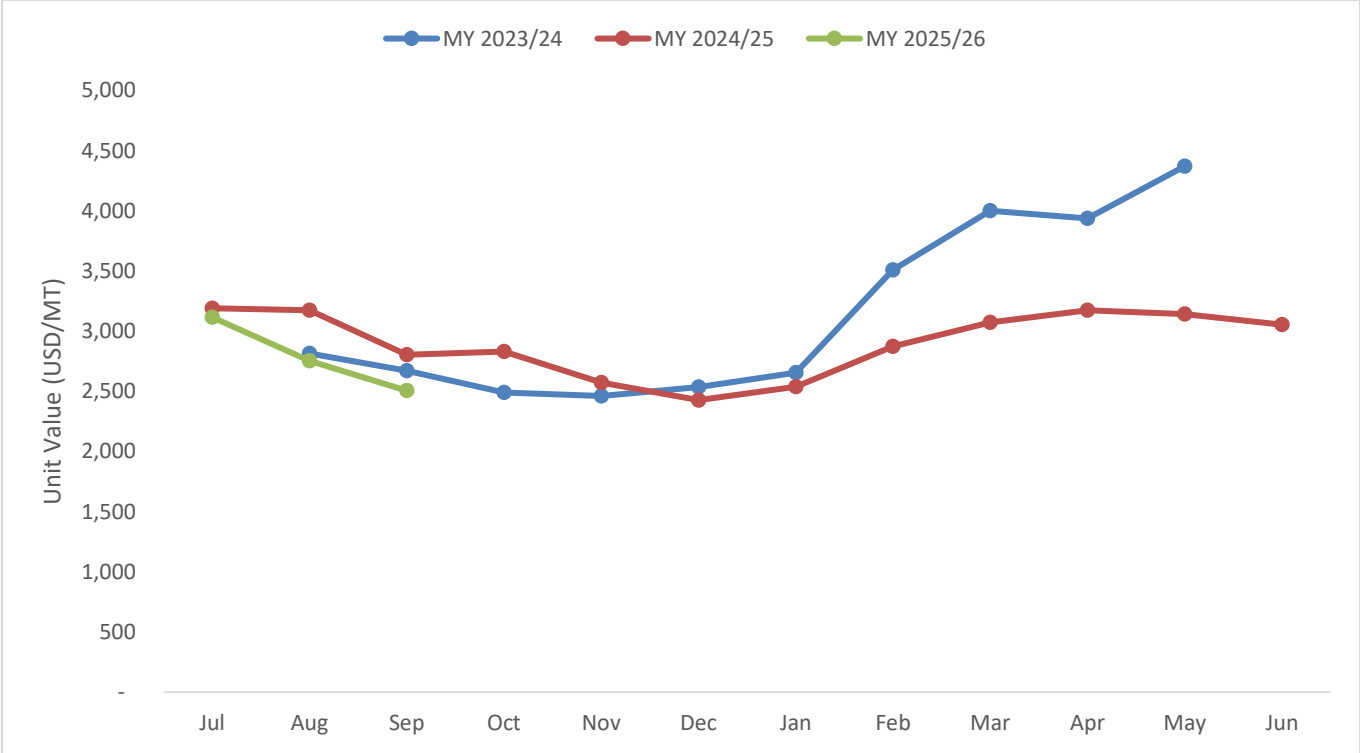
Figure 3 shows the unit value (USD/MT) for Chilean avocado exports by month. Export values peak from April to July each year, during the Chilean offseason when avocado supply is lower. In the beginning of MY 2025/26, July to September 2025, unit values were significantly lower than the previous marketing years, which is consistent with an increase in production and exports.

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



Source: Trade Data Monitor, LLC

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



Source: Trade Data Monitor, LLC

Imports

In MY 2024/25, Chilean avocado imports decreased by 27.6 percent, totaling 49,751 MT, due to higher domestic production. Import volumes in the first three months of MY 2024/25 totaled 34,998 MT, a significant 82.3 percent increase compared to the 19,202 MT imported during the same period in MY 2023/24 (Table 4). Peru remains Chile's dominant supplier, accounting for 99.8 percent of total imports (49,651 MT). Other smaller suppliers include Brazil and Argentina (Table 4).

Import values also declined significantly. In MY 2024/25, Chile imported avocados valued at \$74.9 million, a 33.7 percent decrease compared to the \$112.8 million recorded in MY 2023/24. Peru accounted for 99.8 percent of total import value (\$74.7 million), while Brazil and Argentina contributed marginal shares of \$78,651 and \$67,319, respectively (Table 5). Avocado imports peak during Chile's non-production months, typically between May and August, when domestic supply is unavailable (Figure 4).

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

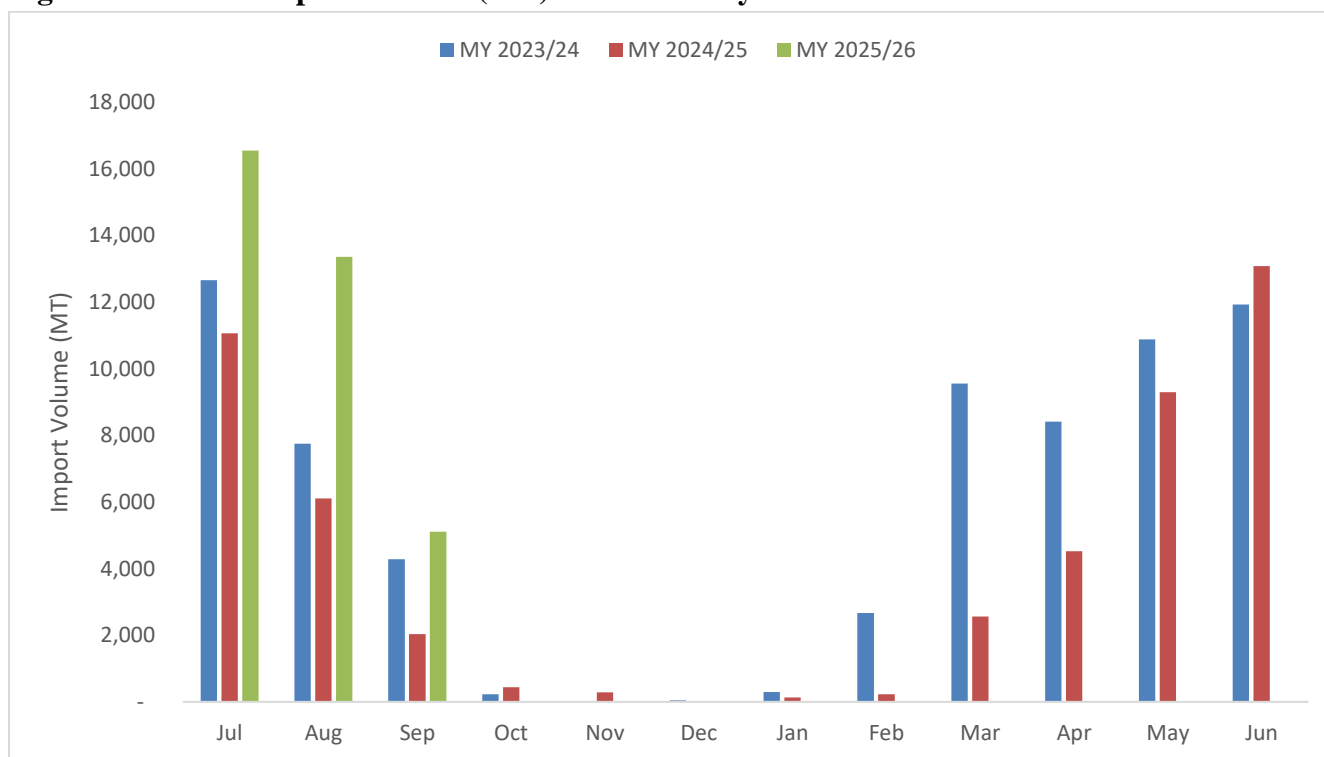
Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (MT)	MY 2024/25 (MT)	Variation (%)	Jul 24 - Sep 24 (MT)	Jul 25 - Sep 25 (MT)	Variation (%)
The World	68,694	49,751	-27.6%	19,202	34,998	82.3%
Peru	67,700	49,651	-26.7%	19,139	34,465	80.1%
Brazil	16	44	175.0%	21	53	152.4%
Argentina	18	42	133.3%	42	0	-100.0%
Chile	0	14		0	24	
Colombia	394	0	-100.0%	0	384	
Mexico	546	0	-100.0%	0	0	
United States	21	0	-100.0%	0	0	
Ecuador	0	0		0	73	

Source: Trade Data Monitor, LLC

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

Partner Country	Marketing Year			Year to Date		
	MY 2023/24 (USD)	MY 2024/25 (USD)	Variation (%)	Jul 24 - Sep 24 (USD)	Jul 25 - Sep 25 (USD)	Variation (%)
_World	112,852,940	74,873,225	-33.7%	34,715,362	47,160,900	35.9%
Peru	110,951,462	74,715,825	-32.7%	34,603,725	46,435,981	34.2%
Brazil	16,844	78,651	366.9%	43,789	65,782	50.2%
Argentina	19,657	67,319	242.5%	67,319	0	-100.0%
Chile	0	9,182		0	59,724	
Spain	0	1,719		0	0	
Colombia	586,361	512	-99.9%	512	543,925	106135.4%
Mexico	1,244,300	18	-100.0%	18	0	-100.0%
United States	34,317	0	-100.0%	0	0	
Ecuador	0	0		0	55,487	

Source: Trade Data Monitor, LLC

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

Source: Trade Data Monitor, LLC

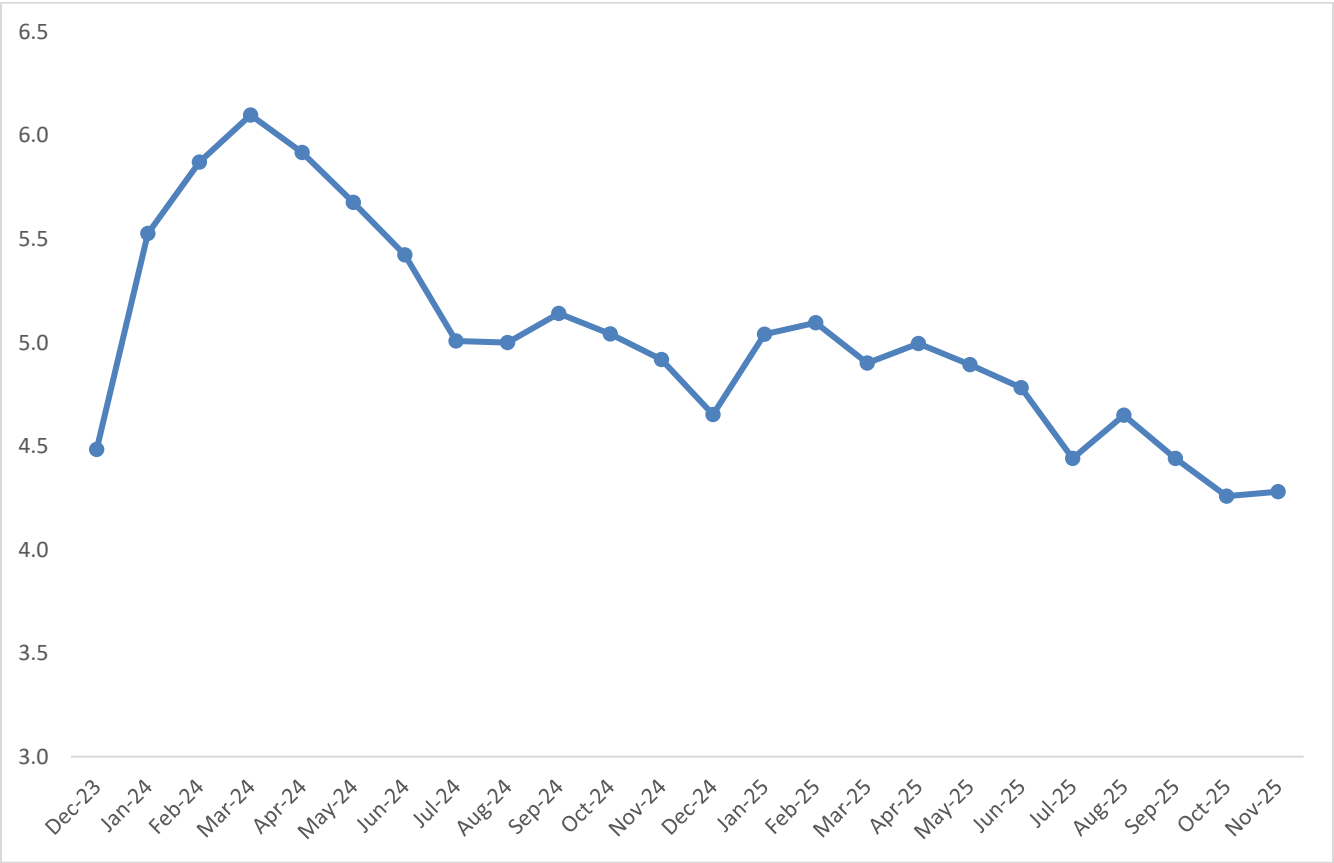
Consumption

After Mexico, Chile has the second highest per capita avocado consumption level in the world. Domestic demand is consistently strong, as Chileans consider avocados a staple food and incorporate them into everyday meals. The food service industry also incorporates avocados broadly into products such as sandwiches, hot dogs, salads, and sushi.

In general, larger and defect-free avocados are sold in retail markets, while smaller sized avocados are typically preferred by the food service sector. Consumption tends to rise around July and August when domestic supply increases and retail prices fall. Despite its cultural importance, avocado demand in Chile is price-sensitive, and consumption levels can fluctuate noticeably when prices peak due to limited supply or increased export activity.

Since there is a high demand for avocado, domestic prices are high and competitive compared to export price. Avocado prices are higher during the offseason between February and April each year (Figure 5). Prices are usually from \$4.50 USD per kilogram (kg) to \$5.00 USD per kg, but they can reach values as high as \$6.10 USD per kg when the avocado supply is low. In MY 2024/25, prices did not pick up too much because of the high supply of avocado.

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