

Voluntary Report – Voluntary - Public Distribution

Date: March 12, 2026

Report Number: MX2026-0019

Report Name: Avocado Annual

Country: Mexico

Post: Guadalajara

Report Category: Avocado

Prepared By: FAS Staff

Approved By: Abigail Mackey

Report Highlights:

Mexico continues to lead the world in avocado production. For 2026, Post forecasts Mexican avocado production to increase by 3 percent to 2.8 million metric tons (MMT). This is mainly a result of favorable growing conditions and sustained export demand. Mexican avocado exports are forecast to increase 7 percent to 1.3 MMT, with the United States remaining Mexico's top destination for avocado exports.

Production

Post forecasts Mexican avocado production in calendar year (CY) 2026 at 2.80 MMT, a 3 percent increase from 2025. This growth is mainly a result of improved agricultural practices, favorable early-season rains and cooler conditions, and sustained export demand. Planted area is forecast to remain flat at approximately 268,000 hectares. Mexico’s avocado sector remains the global leader in production, with an estimated 28 percent of global production.

Table 1: Mexican Avocado Production 2022 – 2026

Year	Planted Area (Ha)	Harvested Area (Ha)	Production (MT)
2022	259,769	243,622	2,603,498
2023	257,571	246,341	2,652,499
2024	256,212	246,044	2,669,032
2025	268,385	255,784	2,725,080
2026*	268,000	255,000	2,800,000

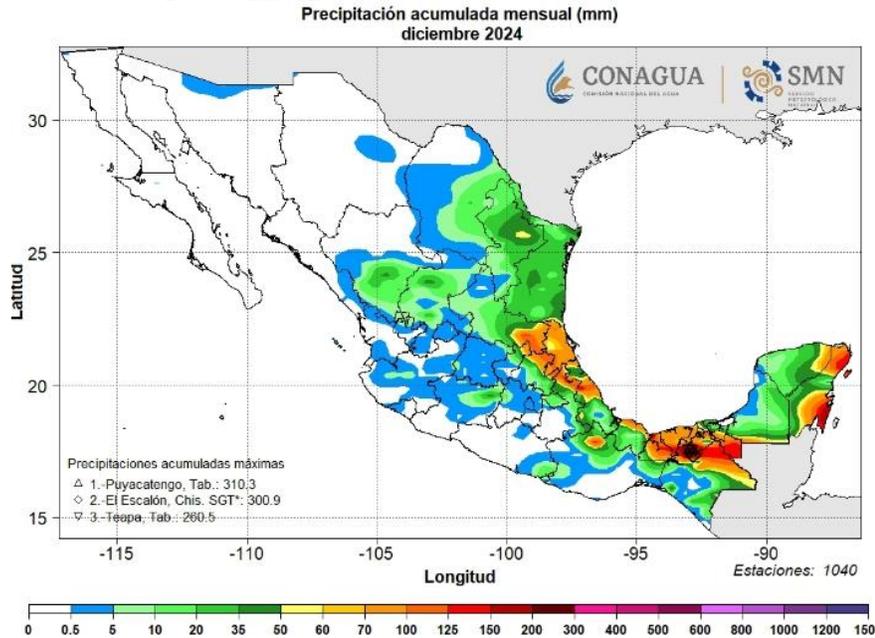
Data Source: Agri-Food and Fisheries Information System (SIAP)

**Post Forecast*

While roughly 65 percent of orchards still rely on seasonal rainfall, producers are rapidly accelerating the adoption of pressurized irrigation. This increase in installations of high-efficiency irrigation systems is allowing producers, mainly in Michoacan and Jalisco, to strengthen water management and tree nutrition.

Favorable climate conditions in 2025 are also helping to drive an increase in production in 2026. The 2025 rainy season was characterized by a late-quarter extension, where significant rainfall through November 2025 and into early December 2025 recharged critical volcanic aquifers. This late-season moisture, combined with mild temperatures (68°F – 73°F) in December, provided the ideal conditions for blooming. This resulted in exceptional fruit retention and allowed the crop to trend toward larger, higher-value sizes. A potential “El Niño” (expected for the second part of CY 2026) could bring drier than average conditions and heat spikes that could decrease fruit sizes.

Map 1: Aggregated Rainfall for December 2024



Source: Mexican National Water Commission

Legend: From left to right on scale above, white represents low rainfall and purple represents high rainfall

Map 2: Aggregated Rainfall for December 2025



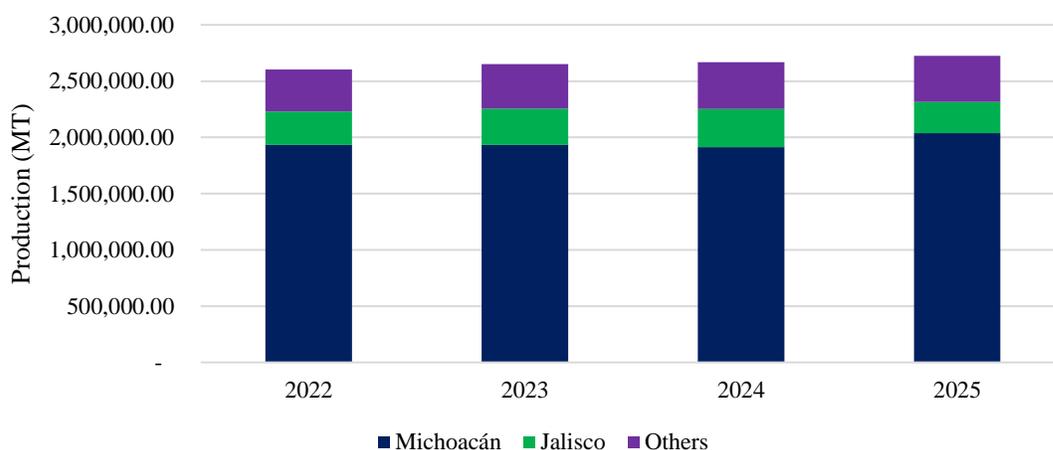
Source: Mexican National Water Commission

The Hass variety continues to dominate all commercial production due to its post-harvest durability and high consumer preference. After a 2024 cycle marked by smaller fruit sizes due to heat stress, the 2025 crop shows a marked recovery in quality and caliber. Producers are reporting a return to more retail-friendly weights, with a high availability of 40s and 48s (ranging from 9 to 12 ounces).

Mexico produces avocados in 30 out of the 32 states in the country. However, Michoacan and Jalisco are the highest producing states, with 85 percent of production in volume, and are the only states authorized to export to the United States. Remaining production in the other states is focused on the national market and niche international destinations. Michoacan remains the heart of production, situated within the Trans-Mexican Volcanic Belt, where rich, well-draining volcanic soil covers approximately 80 percent of the total planted area. Orchards are strategically positioned at elevations between 3,940 and 7,545 feet (1,200 to 2,300 meters) above sea level, a range that naturally facilitates four overlapping blooming seasons¹ that ensure a continuous supply to international markets.

Post estimates Mexican avocado production for CY 2025 at 2.73 MMT, a 2 percent increase from 2024. High summer temperatures and drought conditions in 2024 hit the avocado production area in Michoacan and Jalisco. CY 2025 started slow, but volumes recovered given an improvement in climate conditions and a strong rainy season in Mexico.

Graph 1: Mexico Avocado Production by State, 2022-2025 (MT)



Data Source: SIAP

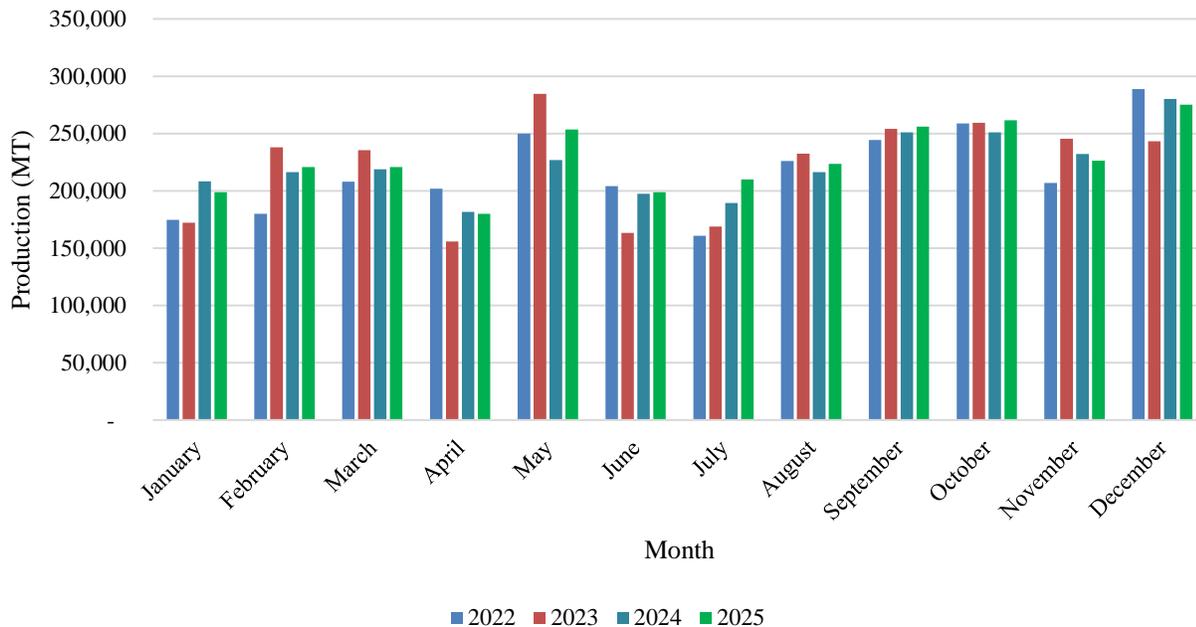
Table 2: Avocado Production for 2025 in Top Producing States in Mexico (MT)

State	Production (MT)	Share of Total Mexican Production
Michoacan	2,039,166	75%
Jalisco	276,851	10%
Others	409,063	15%

Data Source: SIAP

¹ Loca (June – September), Avanzada (September – November), Normal (December – April, main blooming season), and Marceña (April – March)

Graph 2: Monthly Production of Avocados (MT), 2022-2025



Data Source: SIAP

Consumption

Mexico's avocado consumption for CY 2026 is forecast at 1.50 MMT, a 1 percent drop from 2025. This is mainly a result of reduced domestic supply given the increase in international demand and upcoming major sporting events in the United States. Avocados are still largely considered a luxury good in Mexico due to higher prices compared to other fruits available for consumers.

The industrial processing sector for avocados is expected to maintain similar output in Mexico in 2026. This sector focuses on three main production lines: guacamole and pulp, avocado oils, and cosmetics. According to industry, approximately 20 percent of the national production is destined towards this sector, with the majority being avocados not suitable for the export market.

Post estimates 2025 Mexican consumption of avocados at 1.51 MMT, a 4 percent increase from 2024. The increase is linked to larger volumes of non-export grade avocados (i.e., skin bruises, smaller sizes) staying in Mexico for local consumption.

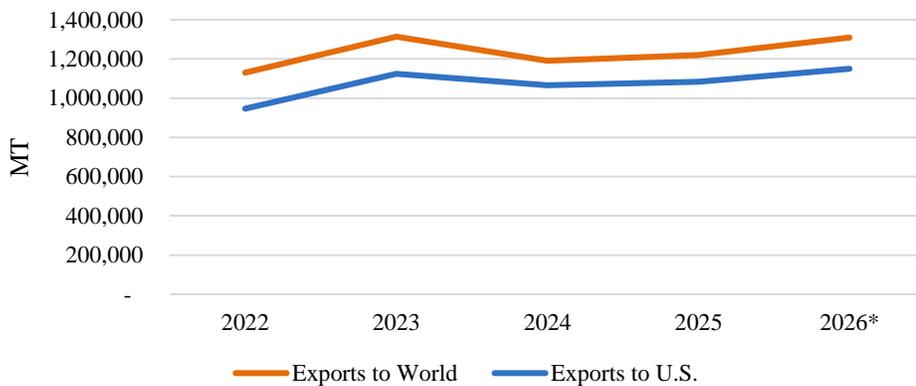
Trade

Post forecasts avocado exports at 1.31 MMT in CY 2026, up 7 percent year-on-year to meet growing international demand, predominantly from the United States. Early 2025 saw prices spike due to shortages, coming off from a hot winter in 2024. However, prices stabilized in 2025 with favorable weather and more than enough rain during Mexico's rainy season, increasing supply.

The U.S. market accounts for almost 90 percent of Mexico’s total avocado exports by volume. Canada, Japan, and Central America make up the remaining 10 percent. The Super Bowl season in the United States also continues to drive demand, with record breaking exports of 136,000 MT in just four weeks between January and February. The World Cup this summer will also be a key driver for Mexican avocado exports into the United States.

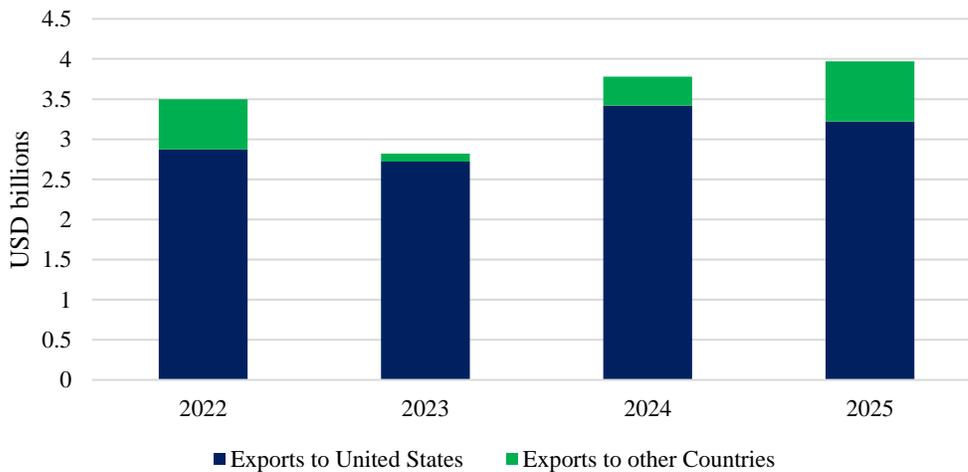
In CY 2025, exports reached 1.22 MMT, up 2 percent compared to CY 2024, primarily due to a strong year by Mexican producers and growing demand from consumers in international markets. Exports to the United States reached 1.08 MMT in CY 2025, a 2 percent increase from the previous year.

Graph 3: Mexico Avocado Exports (MT)



Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor
**Post Forecast*

Graph 4: Mexico Avocado Exports (USD billions)



Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor

Mexico is not a major avocado importer. Imports mainly come from Peru and Colombia to help meet domestic demand during seasonal low production periods. Imports are forecast at 3,000 MT in 2026, down 25 percent from an estimated 4,025 MT in 2025 due to increasing production.

Policy

Mexican Avocado Import Program

APHIS and SENASICA continue to oversee exports under the operational workplan (OWP) for Hass avocados, which grants market access for avocado imports from Mexico to the U.S. market. As part of the OWP, fruit must be sourced from orchards verified and certified by SENASICA inspectors in Mexico and must also be inspected at packing facilities by APHIS inspectors prior to export to the United States. Mexico is currently approved to export avocados from two states: Michoacan and Jalisco.

Plan Michoacan for Peace and Justice

On December 16, 2025, Mexico's federal and state governments, together with the avocado export sector in Michoacan, [launched](#) a Labor Certificate for Agricultural related exports as part of the "*Plan Michoacán for Peace and Justice*." This certificate will initially apply to Hass avocado exports and gradually extend to other agricultural products. The certificate aims to ensure compliance with labor law, including verifying that each export shipment is backed by formally hired workers registered with the Mexican Social Security Institute (IMSS). There will be a six-month trial period starting on April 1 2026, during which exports can continue even without the certificate, to allow producers time to adapt and correct inconsistencies.

Michoacan Deforestation-Free Certification Program

On August 29, 2024, the state of Michoacan implemented a voluntary certification system named [Forest Guardian](#), 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.

Attachments:

No Attachments.