



MEXICO: COUNTRY REPORT



**World Avocado Congress
Cairns, Australia
September 9, 2011**



OVERVIEW OF PRESENTATION



- **Producing areas and production trends**
- **Exports to USA**
- **Exports to other countries**
- **Forecast for the 2011-12 season**
- **Conclusions**



México



PRODUCING STATES



MAIN PRODUCING STATES



MICHOACAN: LARGEST PRODUCING STATE



México



MAIN PRODUCING STATES

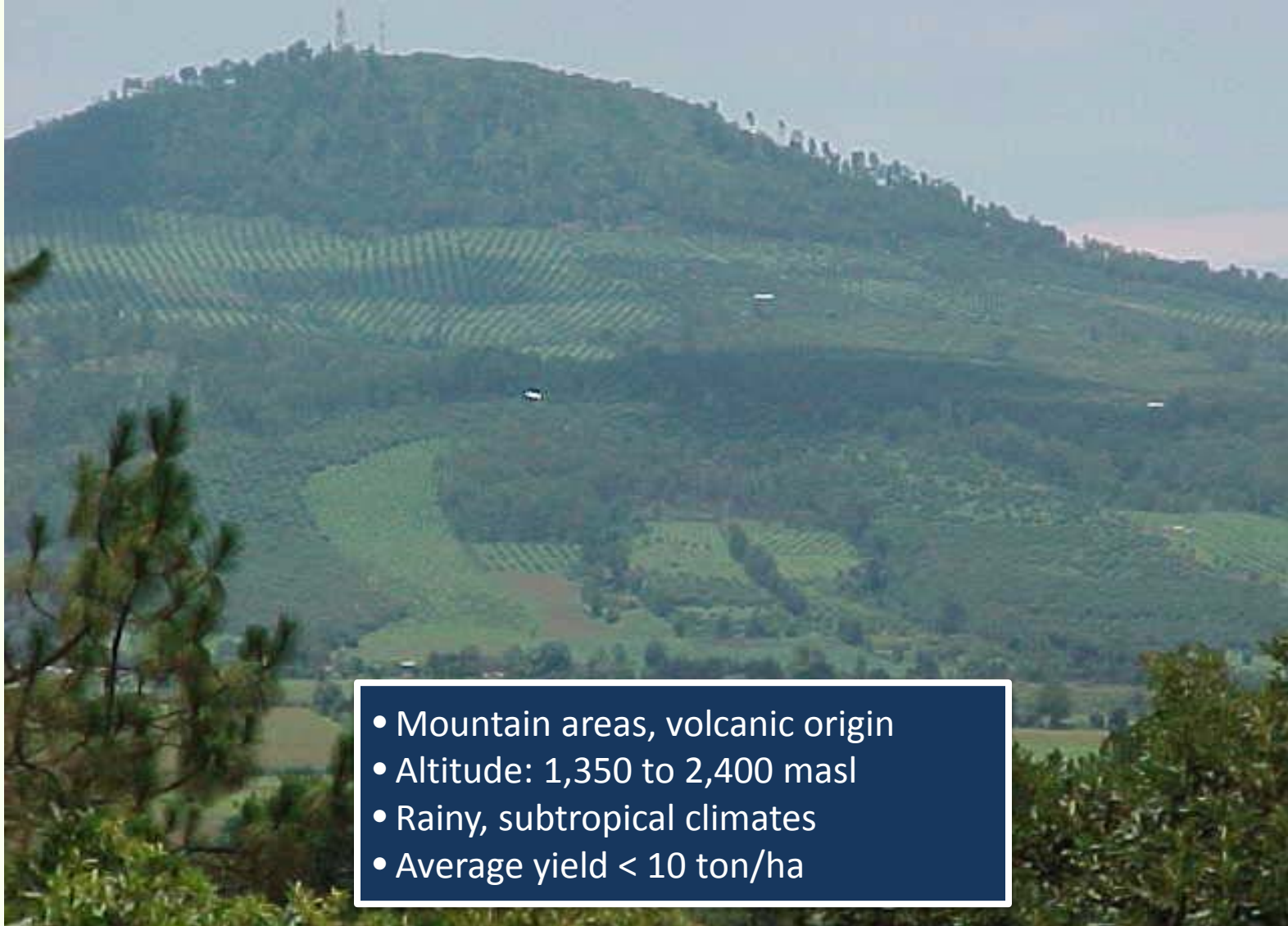
STATE	HECTARES	GROWERS	CROP (Tons)	SHARE	% Δ
MICHOACAN	107,058	14,650	920,276	85%	3.3
JALISCO	8,468	298	29,985	3%	12.4
MEXICO	3,615	825	21,332	2%	1.0
MORELOS	3,348	1,090	26,935	2%	5.7
NAYARIT	2,708	748	25,843	2%	7.6
GUERRERO	2,394	195	12,338	1%	< 1%
PUEBLA	1,644	289	8,171	1%	< 1%
OTHER STATES	5,090	2,203	32,625	3%	-
TOTAL	134,325	20,298	1,077,505	100%	

Datos 2010 (Cantidades expresadas en toneladas)

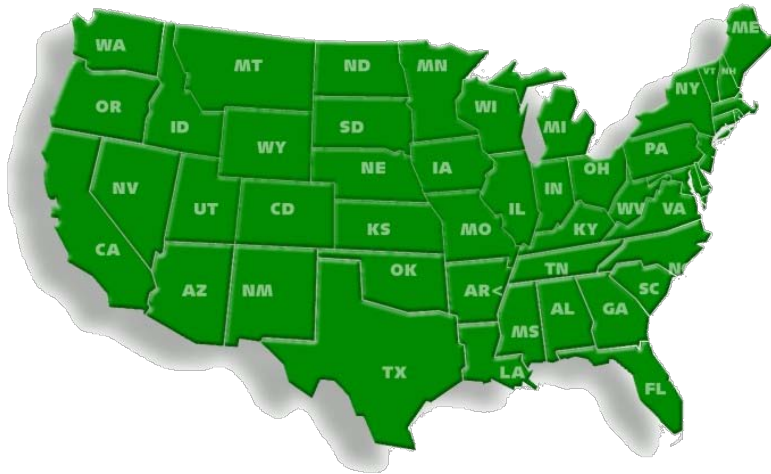
Fuente: Elaborado por el Servicio de Información Agroalimentaria y Pesquera (SIAP), con información de las Delegaciones de la SAGARPA.



MICHOACAN: MAIN PRODUCING AREA



- Mountain areas, volcanic origin
- Altitude: 1,350 to 2,400 masl
- Rainy, subtropical climates
- Average yield < 10 ton/ha



EXPORT PROGRAM TO USA



MICHOACAN: EXPORT PROGRAM TO USA (2011-2012)



24 CERTIFIED MUNICIPALITIES



36 CERTIFIED PACKINGHOUSES



56,645 CERTIFIED HECTARES (53%)



6,869 GROWERS (47%)



10,172 CERTIFIED ORCHARDS



EXPORTS TO USA (2010-2011)



HARVESTED: 361,524 TONS



EXPORTED: 284,214 TONS

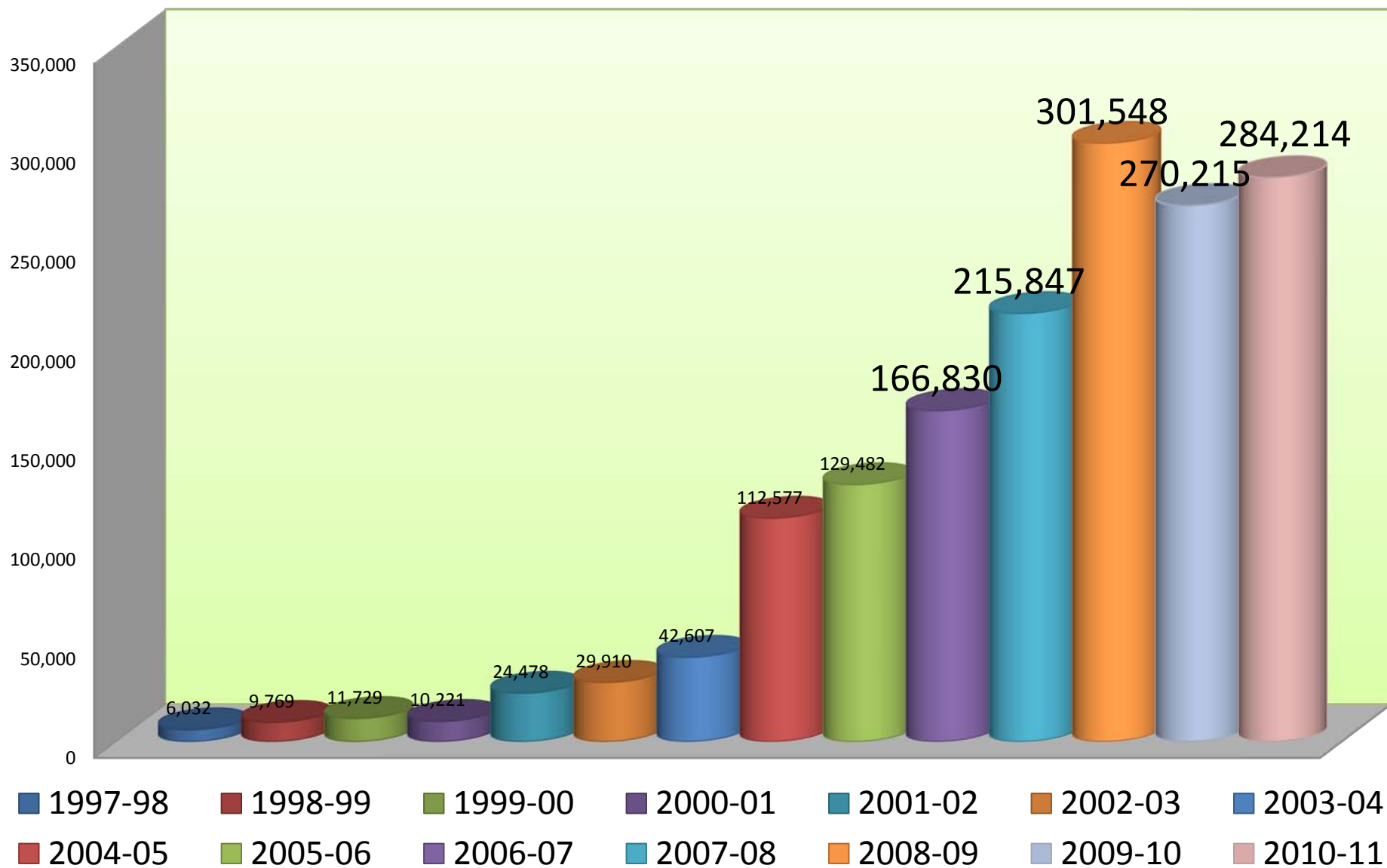


15,130 TRUCKLOADS



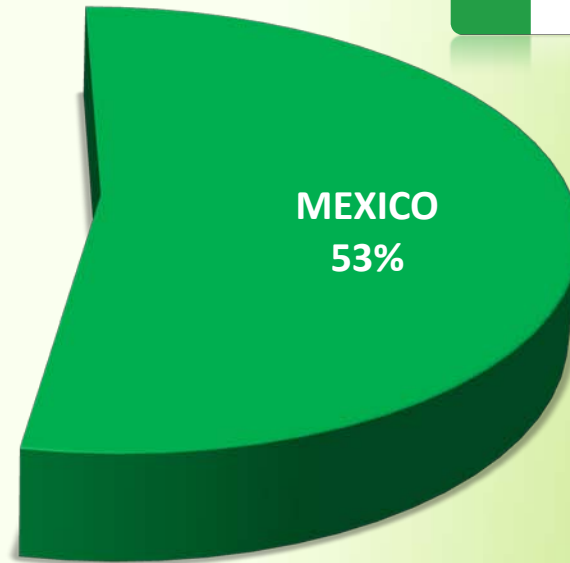
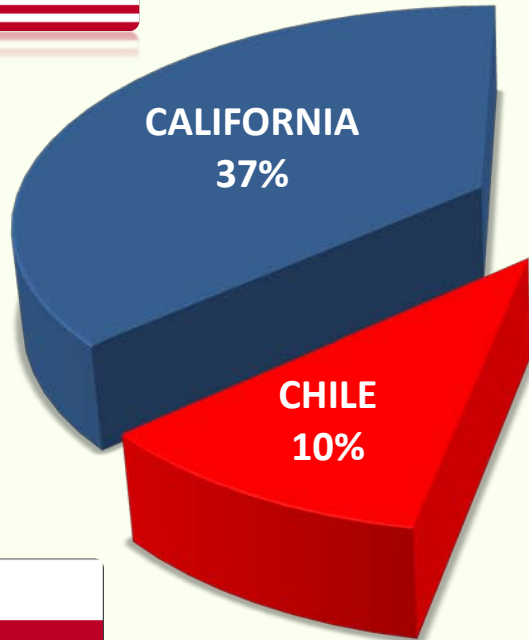


EXPORTS TO USA (Tons)





USA SUPPLIERS 2010-2011



MEXICO	284,214 TONS	53%
CHILE	54,295	10%
CALIFORNIA	195,709	37%

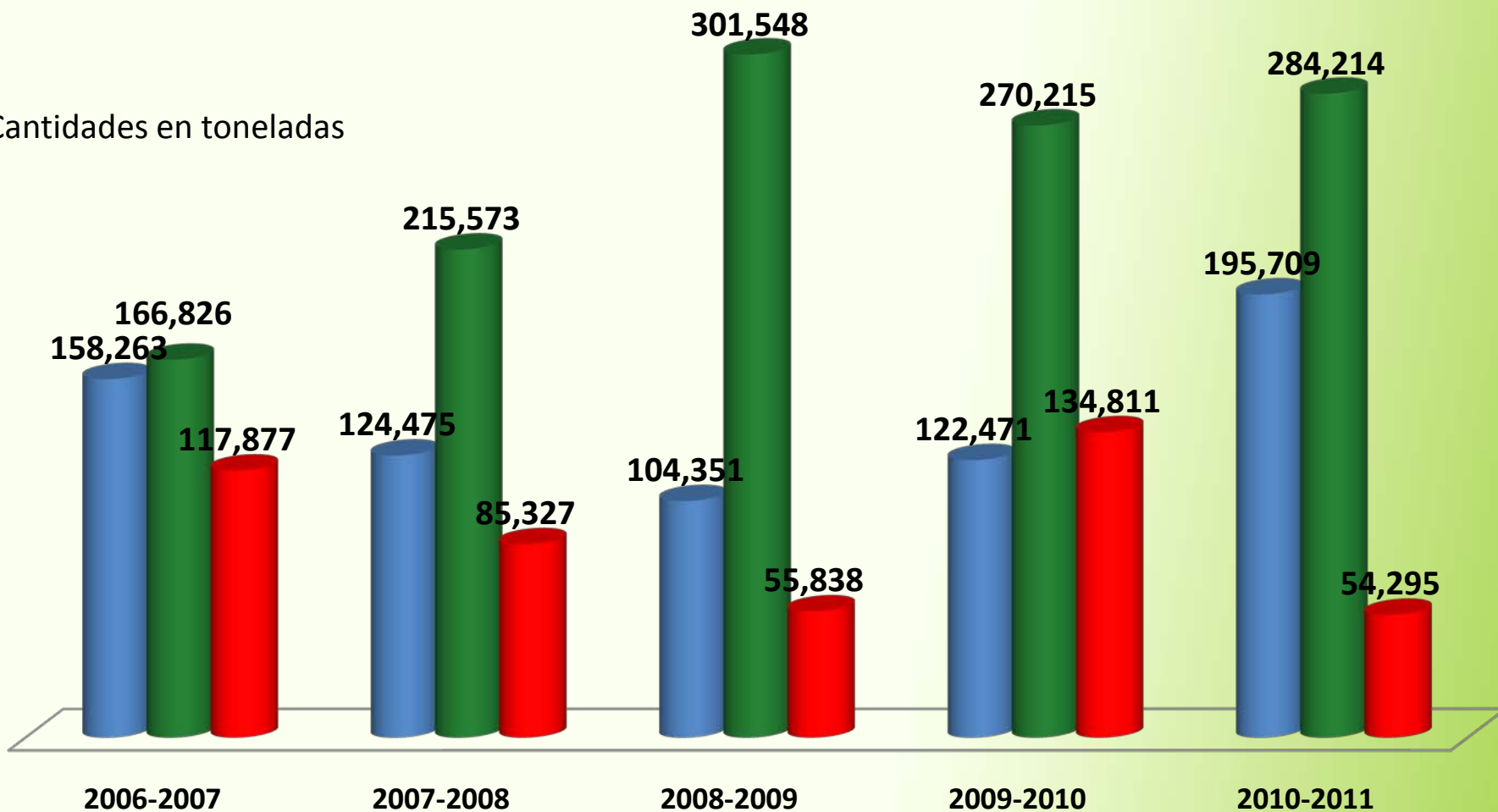


USA SUPPLIERS 2006-2011



■ CALIFORNIA ■ MEXICO ■ CHILE

*Cantidades en toneladas





DEVELOPMENT OF THE USA MARKET



**CONSUMPTION HAS INCREASED 200%
BETWEEN 1997 AND 2010**



GEOGRAPHICAL EXPANSION 1997-2007



YEAR-ROUND AVAILABILITY



GROWTH OF HISPANIC POPULATION



PROMOTIONAL PROGRAMS



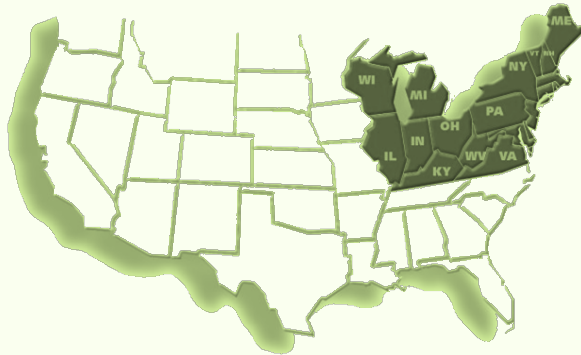
DEVELOPMENT OF THE USA MARKET



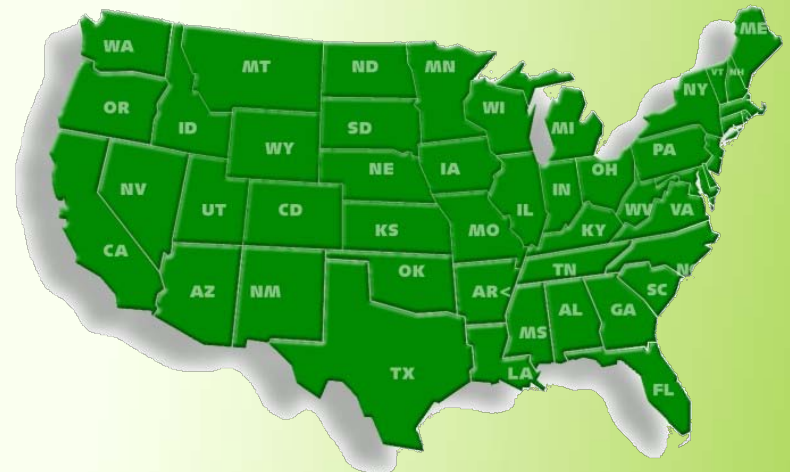
1997
19 STATES
4 MONTHS

2001
30 STATES
6 MONTHS

2004
49 STATES
12 MONTHS



FEBRUARY 1ST, 2007
ALL CONTINENTAL STATES
YEAR-ROUND





HISPANIC POPULATION

30 million in 2000;

45 million in 2007

Estimated 55 million in 2050

**Group with the highest consumption in
fruits and vegetables:**

228 USD per family/month, vs. 165 (Anglos)
& 130 (African-americans)



DEVELOPMENT OF THE USA MARKET

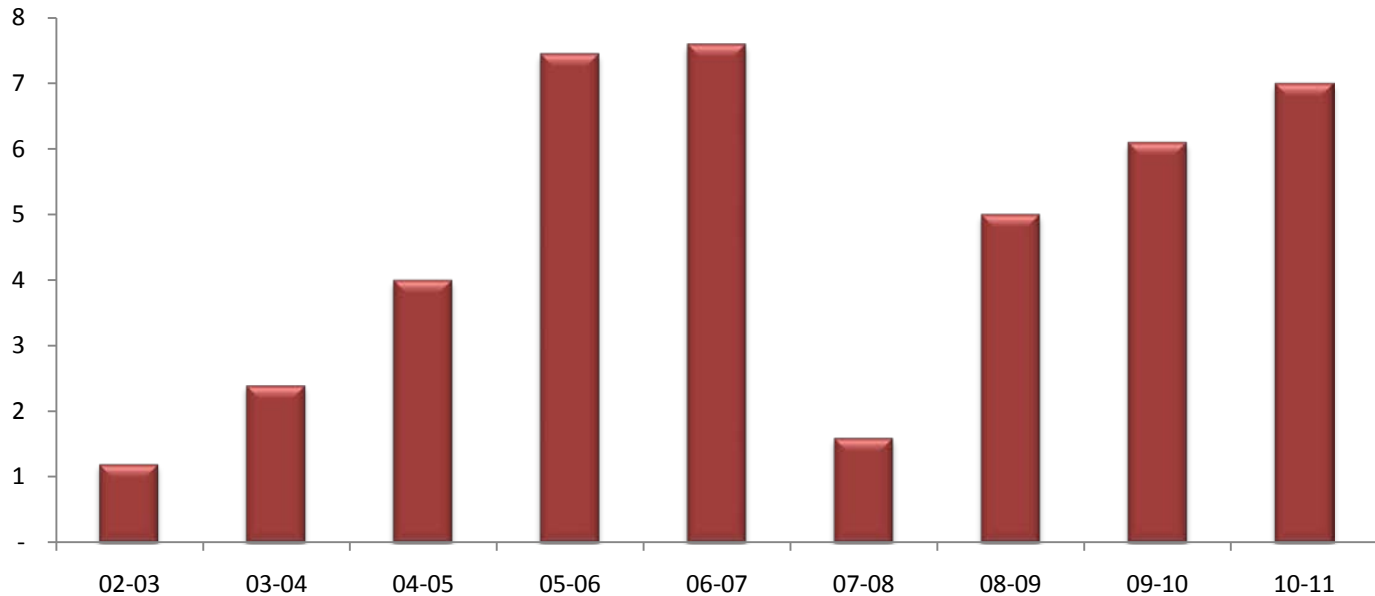


INVESTMENT IN PROMOTIONS

MHAIA: 13-14 million USD in 2010-11

In synergy with HAB, CAC & CAIA

APEAM's Program: 7 million

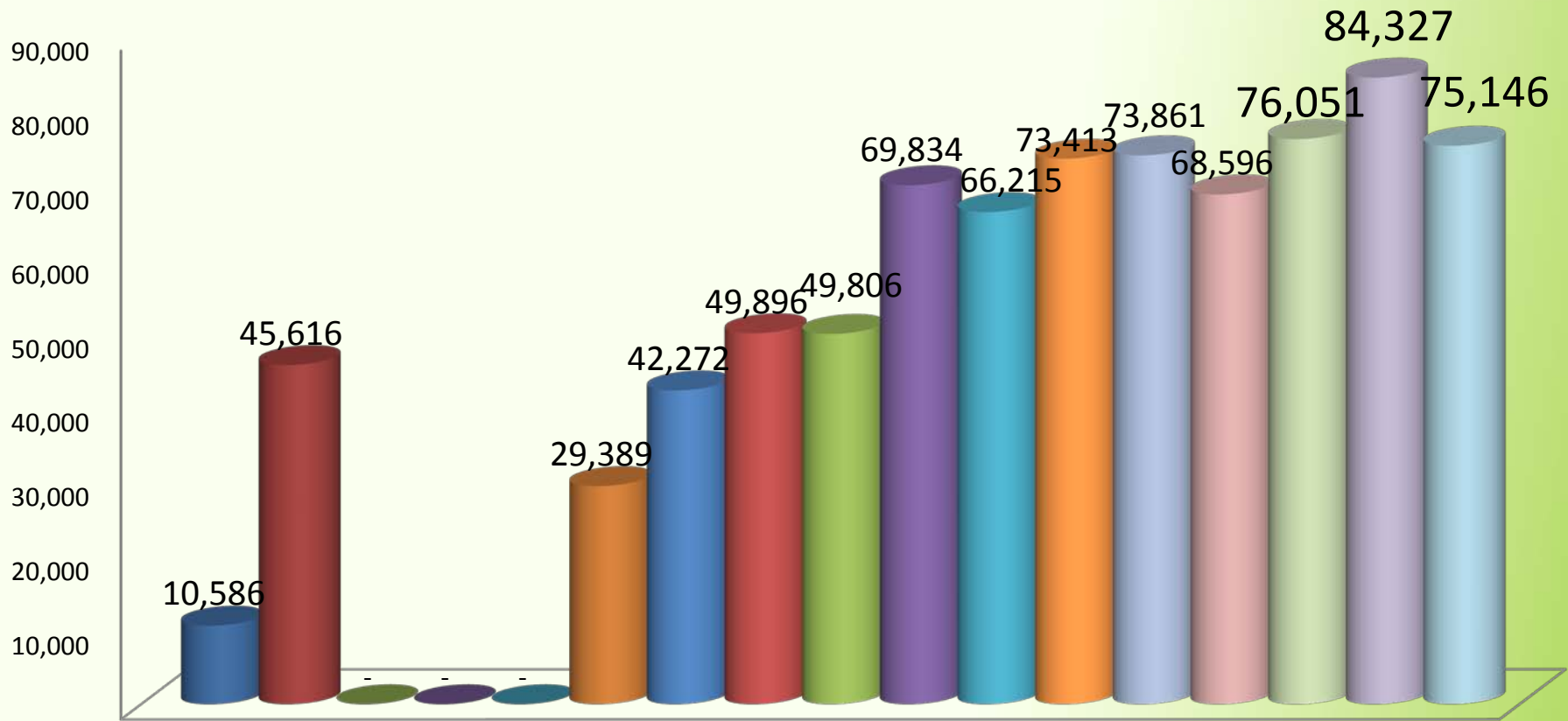


EXPORTS TO OTHER COUNTRIES





EXPORTS TO OTHER MARKETS

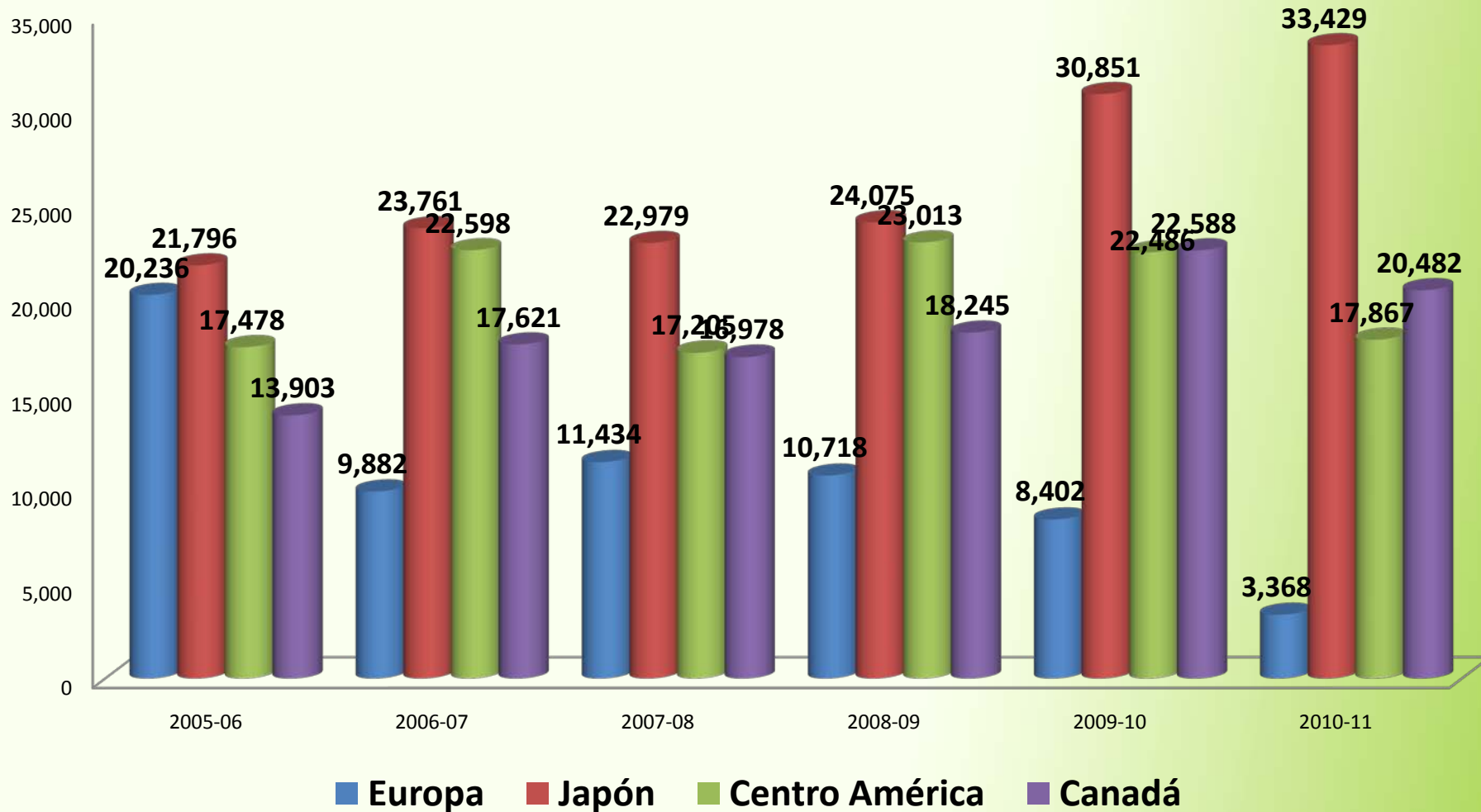


1

- 1991-92 ■ 1995-96 ■ 1996-97 ■ 1997-98 ■ 1998-99 ■ 1999-00
- 2000-01 ■ 2001-02 ■ 2002-03 ■ 2003-04 ■ 2004-05 ■ 2005-06
- 2006-07 ■ 2007-08 ■ 2008-09 ■ 2009-10 ■ 2010-11



OTHER EXPORT MARKETS





FORECAST: SEASON 2011-12



- **TOTAL PRODUCTION IN MICHOACAN:**
 - **1'110,000 TONS**
- **EXPORTS TO USA**
 - **310,000 TONS**
- **EXPORTS TO OTHER MARKETS**
 - **100,000 TONS**
- **DOMESTIC MARKET**
 - **700,000 TONS**

MAIN CHALLENGES



Increase productivity by improving pre- and post-harvest technology



Maintain marketing efforts to increase consumption in main markets (domestic and international)



Establish industry-wide development programs

- **Research**
- **Sustainability**
- **Food Safety**
- **Quality Assurance**



CONCLUSIONS



The Mexican avocado industry keeps growing, at a constant and moderate rate



Export activities show high dynamism and accelerated growth

- Increasing percentage of our crop for export markets
- New producing areas



The industry is focused in the US market

- Japan, Canada and Central America are also important markets
- Europe is an occasional market
- Other markets in Asia and Latin America have potential in the long term



THANK YOU!!!



**ASOCIACION DE PRODUCTORES
Y EMPACADORES EXPORTADORES
DE AGUACATE DE MICHOACAN, A.C.**

www.apeamac.com

www.avocadosfrommexico.com