MRL Policies and Trends in Latin America and the Caribbean

2026 California Specialty Crops Council

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Agenda

- U.S. specialty crops exports to Latin America and the Caribbean
- Status of MRL policy in Latin America and the Caribbean
- Status of U.S. EPA MRLs in Latin America and the Caribbean
- Observed MRL trends in practice in Latin America and the Caribbean
- Key Conclusions for U.S. specialty crops looking to expand into emerging markets

U.S. Specialty Crop Exports to LAC
Total: $4.7 Billion in 2025

Growth trends in U.S. specialty crop exports to LAC (2021-2025):

1. **Mexico** remains the dominant market for U.S. specialty crops, led by fresh fruit and tree nuts.
2. **Panama** is a major growth spot, especially for U.S. fresh fruit and prepared veg.
3. **Dominican Republic** shows strong growth in U.S. fresh vegetables and prepared veg.
4. **Guatemala** continues steady gains in U.S. frozen vegetables and deciduous fruit
5. **Chile** shows notable increases in U.S. tree nuts and citrus imports
6. **Colombia** shows growth in nuts, hops, and frozen veg. imports from the U.S.
7. **Peru** increases in U.S. fresh deciduous imports, while pulses show mixed trends.

Source: FAS GATS, March 2026 Report

Country	Competent Authority	MRL Adoption / Deferral Pathway in written regulations						Import MRL Procedure? (Y/N)
		National	CODEX	EU	U.S. EPA	Other	Default	
Andean C.	AG	1*	=			= intl, fc, rgt		No
Argentina[1]	AG	1					2	No
Argentina[2]	AG	1	2				3	No
Belize	AG		1					No
Bolivia	AG	1*	=			= intl, rgt		No
Brazil	H	1	=			= oecd		No
Chile	H		1	2	3		4	No
Colombia	H		1					No
Costa Rica	AG		1	+	+	3 fc		No
Dom. Rep.	AG		1	3	2	4 fc		No
Ecuador	AG		=			= intl, rgt		No
El Salvador	AG		1	3	2			No
Guatemala	AG	1*	2	4	3	5 fc		No
Honduras	AG		1					No
Jamaica	AG		1					No
Mexico	H	=	=	=	=	= fc, oecd		No
Nicaragua	AG		1	+	+			No
Panama	H		1	-	-			No
Paraguay	AG		1		3	2 fc	4	No
Peru	H		1	3	2			No
Uruguay	H		1	3	4	2 fc		No

Source: information compiled by IICA from currently available written regulations at the time this table was prepared; therefore, a margin of error may exist

U.S. EPA MRL Adoption in LAC

Status based on written regulations

10

EPA NOT INDICATED

EPA not explicitly referenced in any instance

Argentina, Brazil, Andean Community (Regional Reg), Belize, Bolivia, Colombia, Ecuador, Honduras, Jamaica, Mercosur (Regional Reg)

9

2ND OPTION AFTER CODEX

EPA is or could be considered as a secondary reference

Costa Rica (+), Dom Rep., El Salvador, Guatemala, Mexico, Nicaragua (+), Panama (-), Peru, Uruguay

2

3RD OPTION AFTER CODEX

EPA considered in third place, only after Codex and other standards

Chile
Paraguay

In the absence of a Codex MRL, U.S. exports face regulatory uncertainty in:

- 10 countries (or subregions) that do not explicitly consider adoption of EPA MRLs
- Panama adopts the lower MRL between EPA and alternatives
- Chile and Argentina, apply EU MRL or other (e.g., default) levels that may not cover EPA levels

Trends
Observations in Practice

- Missing MRLs due to difficulty locating or applying EPA and Codex *crop-group* MRLs
- No “Channels of Trade” Provisions for suspended, modified or revoked MRLs
- Majority of countries lack regulatory pathways that allow minimum-risk products, including biopesticides, to qualify for MRL exemptions.

Trends
Observations in Practice

- Some countries take a conservative approach when registering pesticides and selecting MRLs (adoption of lower MRLs and defaults)
- Implementation of MRL adoption pathways may vary within a government agency due to differing interpretations of vague regulatory language
- Several countries are expanding residue monitoring on imported products, but risk-based frameworks are still catching up

Key Conclusions

- Latin America as a whole is a Codex-aligned region
- However, even in Codex-aligned markets U.S. exports face real MRL vulnerabilities
- Anticipating and closing these gaps is essential for protecting emerging opportunities for U.S. products in LAC markets

Thank you

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