



**Hort
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Strategic levy investment

**AVOCADO
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AVOCADOS

Producers & Market Suppliers 2023

A statistics resource
for Australian
avocado growers
and exporters
prepared by Fresh
Intelligence for
Avocados Australia
and Hort Innovation

**MARKET ANALYSIS
2022/23**



November 2023

This report has been produced as part of the strategic levy investment project *Avocado industry supply and trade data capture and analysis (AV22016)*, part of the Hort Innovation Avocado Fund.

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Definitions

| | |
|-------------|--|
| AUD | Australian Dollars |
| CIF | Cost, Insurance and Freight (nominally import price measures) |
| FAOSTAT | Food and Agriculture Organization Corporate Statistical Database |
| FOB | Free on Board (nominally export price measures) |
| FTA | Free Trade Agreement |
| ITC | International Trade Centre |
| MIRROR DATA | An aggregate measure of supplier country data when primary data is not available |
| UN Comtrade | United Nations Commodity Trade Statistics Database |
| USD | United States Dollars |

Guide to Tables

| | | Calendar years (unless noted otherwise) | | | | | 1 yr change 2019 vs 2018 | 5 year CAGR Compound annual growth rate | |
|---|---------------------|---|---------|---------|---------|---------|-----------------------------|--|------------------------|
| | | 2015 | 2016 | 2017 | 2018 | 2019 | 1 yr chg | 5 yr trend | share of total in 2019 |
| TOTAL SELECTED MARKETS | | | | | | | | | |
| Total Tonnes exported | Volume Tonnes | 97,768 | 160,740 | 193,309 | 144,422 | 156,973 | 9% | 13% | 100% |
| Total FOB Value exported | Value Million AUD | 215.1 | 399.6 | 510.2 | 366.0 | 432.5 | 18% | 19% | 100% |
| Average FOB price | Unit Value AUS / Kg | 2.20 | 2.49 | 2.64 | 2.53 | 2.75 | 9% | 6% | 1.00 |
| Index : 2019 average FOB price all exports = 1.00 Example 2.75 = 1.00 | | | | | | | | | |
| Tonnes to market 1 | EUROPE | 69,908 | 101,927 | 111,539 | 85,682 | 109,585 | 28% | 12% | 69.8% |
| FOB Value exported to 1 | Value Million AUD | 143.58 | 234.58 | 265.34 | 200.75 | 288.84 | 44% | 19% | 66.8% |
| FOB Unit Value of export | Unit Value AUS / Kg | 2.05 | 2.30 | 2.38 | 2.34 | 2.64 | 12% | 6% | 0.96 |
| Supplier's Index price to average FOB price: Example 0.96 = 4% discount to average price | | | | | | | | | |
| Tonnes to market 2 | United States | 10,727 | 27,852 | 38,376 | 27,465 | 15,532 | -43% | 10% | 9.9% |
| FOB Value exported to 2 | Value Million AUD | 24.93 | 82.96 | 123.24 | 77.30 | 53.75 | -30% | 21% | 12.4% |
| FOB Unit Value of export | Unit Value AUS / Kg | 2.32 | 2.98 | 3.21 | 2.81 | 3.46 | 23% | 10% | 1.26 |
| Supplier's Index price to average FOB price: Example 1.26 = 26% premium to average price | | | | | | | | | |

Introduction – Global Avocado Production and Trade

Production

In 2021 the Food & Agriculture Organisation (FAOSTAT) recorded 8.06 million tonnes of avocados being produced globally. The production has increased 10 per cent per year over 5 years. Mexico is the world's largest producer, with 2.4 million tonnes or 28 per cent of the global production (Table 1.1). Colombia is the second largest with 979,000 tonnes produced and increasing and average of 33 per cent per year over 5 years.

Peru is the 3rd largest producer recording 777,000 tonnes with 16 per cent year on year growth and remained the second largest global exporter and the largest exporter in the Southern Hemisphere.

Several countries including Dominican Republic, Indonesia and Venezuela are large producers and relatively low volume exporters compared to the major exporters.

It is noted that the FAO data recorded 124,000 tonnes of production for China yet anecdotal sources suggest that Chinese avocado is in its infancy and would not be anywhere near this volume and has been factored down to 30,000 tonnes.

Table 1.1 Major producers of avocados 2017 - 2021

| | 2017 | 2018 | 2019 | 2020 | 2021 | 5 year trend | 2021 share |
|--------------------|------------------|------------------|------------------|------------------|------------------|--------------|-------------|
| | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | % CAGR | % |
| Mexico | 2,029,886 | 2,184,663 | 2,300,889 | 2,393,849 | 2,442,945 | 4.7% | 28.2% |
| Colombia | 314,275 | 326,666 | 535,021 | 829,147 | 979,618 | 32.9% | 11.3% |
| Peru | 466,758 | 504,517 | 535,911 | 672,232 | 777,096 | 13.6% | 9.0% |
| Indonesia | 363,157 | 410,094 | 461,613 | 609,049 | 669,260 | 16.5% | 7.7% |
| Dominican Republic | 637,688 | 644,306 | 661,626 | 620,087 | 634,368 | -0.1% | 7.3% |
| Kenya | 194,279 | 233,933 | 364,935 | 322,556 | 416,803 | 21.0% | 4.8% |
| Brazil | 213,041 | 235,788 | 242,932 | 266,784 | 300,894 | 9.0% | 3.5% |
| Haiti | 97,520 | 90,699 | 231,719 | 179,333 | 248,135 | 26.3% | 2.9% |
| Chile | 215,000 | 225,000 | 162,988 | 161,210 | 220,000 | 0.6% | 2.5% |
| Israel | 110,000 | 131,720 | 138,766 | 147,000 | 165,000 | 10.7% | 1.9% |
| Ethiopia | 57,120 | 52,389 | 104,492 | 245,336 | 152,505 | 27.8% | 1.8% |
| United States | 132,730 | 168,528 | 123,030 | 187,433 | 136,750 | 0.7% | 1.6% |
| Guatemala | 125,596 | 124,931 | 137,204 | 132,909 | 136,476 | 2.1% | 1.6% |
| Venezuela | 133,922 | 139,685 | 135,606 | 128,694 | 131,531 | -0.4% | 1.5% |
| Australia | 65,861 | 77,032 | 85,545 | 78,085 | 122,197 | 16.7% | 1.4% |
| Spain | 92,936 | 89,592 | 97,730 | 99,070 | 116,770 | 5.9% | 1.3% |
| Malawi | 97,358 | 92,239 | 93,341 | 93,565 | 93,872 | -0.9% | 1.1% |
| South Africa | 62,840 | 127,568 | 89,065 | 84,775 | 82,677 | 7.1% | 1.0% |
| Morocco | 41,695 | 51,170 | 54,576 | 69,940 | 82,369 | 18.6% | 0.9% |
| Cameroon | 71,235 | 75,221 | 74,668 | 74,871 | 75,116 | 1.3% | 0.9% |
| Congo, Dem. Rep. | 65,558 | 65,773 | 62,923 | 63,424 | 63,372 | -0.8% | 0.7% |
| New Zealand | 23,716 | 25,525 | 34,368 | 37,590 | 38,321 | 12.7% | 0.4% |
| Cote d'Ivoire | 37,307 | 37,983 | 39,061 | 36,110 | 35,993 | -0.9% | 0.4% |
| China | 12,411 | 21,000 | 29,311 | 30,000 | 30,000 | 24.7% | 0.3% |
| Madagascar | 26,560 | 26,777 | 26,818 | 27,135 | 27,310 | 0.7% | 0.3% |
| Sri Lanka | 30,606 | 50,542 | 22,446 | 19,274 | 14,941 | -16.4% | 0.2% |
| all other | 205,343 | 200,114 | 333,083 | 409,740 | 483,753 | 23.9% | 5.6% |
| Total | 5,924,398 | 6,413,455 | 7,179,667 | 8,019,198 | 8,678,072 | 10.0% | 100% |

Source : FAOSTAT; Fresh Intelligence analysis

Trade

The global export trade in avocados reported by UN Comtrade in 2022/23 was 3.2 million tonnes worth AU\$11.4 billion equivalent. The global trade volume has increased on average by 6.5 per cent per year over the past 5 years. This means that almost 37 per cent of the 8.7 million tonnes of avocado production is traded, the highest level of any major fruit crop produced and traded.

Mexico is the world's largest producer and exporter of avocados with a production of over 2.4 million tonnes and exported 1.23 million tonnes in 2022/23. Mexico exports approximately 50 per cent of its production, mostly to the United States and accounted for 38 per cent of the global exports (Table 1.2)

Peru, Chile and South Africa are the largest Southern Hemisphere exporters and mostly service the North American and European markets. Southern Hemisphere exporters including Australia exported 878,733 tonnes, which was 24 per cent more than the previous year or 27 per cent of global export trade in 2022/23.

Australia, Chile, Peru, and South Africa positively influenced the southern results while New Zealand was lower. Chile appeared to be reversing a declining trend.

Chile exported fewer avocados due to lower production levels and competition from Peru and Colombia. Tanzania is the fastest growing producer of avocados in Africa and increased 51 per cent last year, and now accounts for over 70 per cent of trade into India.

South Africa increased 25 per cent year on year however the 5-year trend is flat indicating that South Africa is not steadily expanding exports in the same way as Kenya and Tanzania.

Table 1.2 Major producer / exporters of avocados 2018/19 – 2022/23.

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------------|------------------|------------------|------------------|------------------|------------------|--------------|--------------|---------------|
| | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | | | |
| Mexico | 1,056,267 | 1,121,363 | 1,274,676 | 1,037,175 | 1,227,545 | 18.4% | 3.8% | 38.1% |
| Peru | 371,848 | 355,958 | 467,838 | 536,935 | 664,492 | 23.8% | 15.6% | 20.6% |
| Netherlands * | 330,374 | 338,703 | 383,571 | 432,131 | 422,454 | -2.2% | 6.3% | 13.1% |
| Spain | 118,820 | 126,433 | 137,491 | 151,160 | 133,440 | -11.7% | 2.9% | 4.1% |
| Kenya | 67,736 | 71,979 | 97,889 | 88,675 | 113,815 | 28.4% | 13.9% | 3.5% |
| Israel | 67,661 | 82,467 | 68,193 | 91,883 | 102,008 | 11.0% | 10.8% | 3.2% |
| Colombia | 30,008 | 44,570 | 77,075 | 96,904 | 98,595 | 1.7% | 34.6% | 3.1% |
| Chile | 147,019 | 134,847 | 74,041 | 126,775 | 88,413 | -30.3% | -11.9% | 2.7% |
| South Africa | 73,798 | 47,165 | 52,843 | 56,950 | 71,367 | 25.3% | -0.8% | 2.2% |
| Tanzania | 7,428 | 8,856 | 8,374 | 12,126 | 18,387 | 51.6% | 25.4% | 0.6% |
| New Zealand | 17,493 | 21,301 | 28,966 | 22,062 | 15,904 | -27.9% | -2.4% | 0.5% |
| Australia | 3,195 | 4,051 | 3,155 | 11,611 | 10,672 | -8.1% | 35.2% | 0.3% |
| United States | 8,696 | 12,474 | 9,469 | 3,240 | 3,682 | 13.6% | -19.3% | 0.1% |
| Other | 234,792 | 284,658 | 312,988 | 334,273 | 279,877 | -16.3% | 4.5% | 8.7% |
| Global Exports | 2,505,750 | 2,616,998 | 2,954,979 | 2,964,988 | 3,220,393 | 8.6% | 6.5% | 100% |
| <i>Southern Hemisphere</i> | <i>524,005</i> | <i>488,009</i> | <i>630,099</i> | <i>706,297</i> | <i>878,733</i> | <i>24.4%</i> | <i>13.8%</i> | <i>27%</i> |

Source: ITC Trademap, IHS Global Trade Atlas; Fresh Intelligence analysis

note: * Netherlands is 100% re export and is included for context with Spain, which is in part production and part re export.

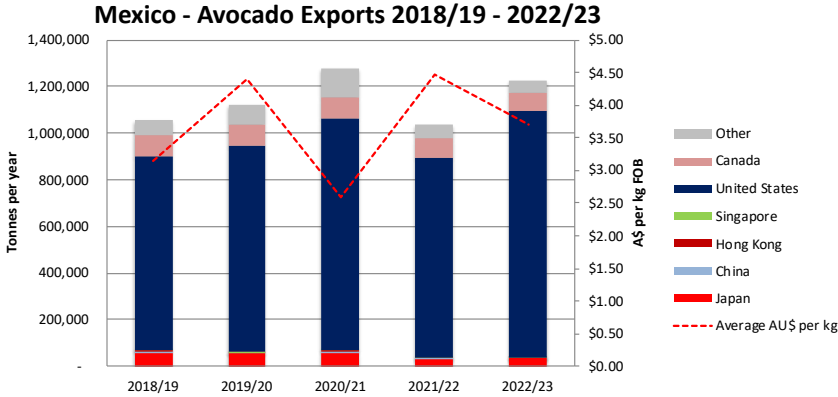
Avocado producers and market suppliers



Mexico

Mexico is the world’s largest producer and exporter of avocados. In 2021 Mexico produced 2.44 million tonnes of avocados according to FAOSTAT, rising an average 6 per cent per year over 5 years.

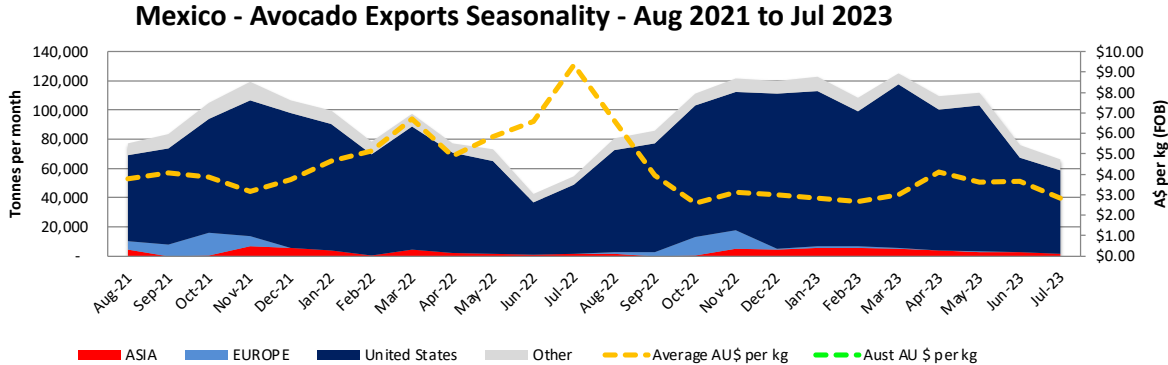
In 2022/23 Mexico exported 1.23 million tonnes of avocados with an average export FOB unit value of AU\$3.71 per kg (Table 2.1). The United States was by far the main destination accounting for 86 per cent of all Mexico’s avocado exports by volume. Canada follows with 7 per cent of the volume which meant that 93 per cent of Mexico’s avocados were exported to the US and Canada. Volumes rebounded 18 per cent after destabilizing supply conditions improved and prices decreased. The 5-year trend is increasing at 4 per cent per year.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 2.1 Mexico avocado exports by yearly volume 2018/19 – 2022/23 and FOB unit value (AU\$ equivalent)

Mexico exports avocados all year round although the main export season is from October to May (Figure 2.2). During 2021 there were periods of high price points during the low season influenced by a tightening of supply from May to September. This caused a fall in trade to Asia, notably Japan, that was partially offset by supplies from Peru. Figure 2.2 highlights the high prices in July 2022 influenced by supply instability that started with the temporary US market closures.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 2.2 Mexico avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 2.1 Mexico avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|----------------|------------------|------------------|------------------|------------------|----------|------------|---------------|
| Volume Tonnes | 1,056,267 | 1,121,363 | 1,274,676 | 1,037,175 | 1,227,545 | 18% | 4% | 100% |
| Value Million AUD | 3,324.8 | 4,923.5 | 3,297.5 | 4,629.3 | 4,550.9 | -2% | 8% | 100% |
| Unit Value AU\$ / Kg | 3.15 | 4.39 | 2.59 | 4.46 | 3.71 | -17% | 4% | 1.00 |
| Japan | 55,615 | 53,368 | 56,881 | 32,142 | 34,976 | 9% | -11% | 2.8% |
| Value Million AUD | 189.0 | 255.7 | 149.8 | 138.6 | 123.8 | -11% | -10% | 2.7% |
| Unit Value AU\$ / Kg | 3.40 | 4.79 | 2.63 | 4.31 | 3.54 | -18% | 1% | 0.95 |
| China | 8,379 | 4,883 | 7,021 | 1,798 | 2,082 | 16% | -29% | 0.2% |
| Value Million AUD | 25.0 | 20.2 | 16.9 | 6.7 | 5.8 | -13% | -30% | 0.1% |
| Unit Value AU\$ / Kg | 2.99 | 4.14 | 2.40 | 3.75 | 2.81 | -25% | -2% | 0.76 |
| Hong Kong | 4,081 | 1,428 | 3,070 | 661 | 1,034 | 56% | -29% | 0.1% |
| Value Million AUD | 12.59 | 7.93 | 7.79 | 2.48 | 4.68 | 89% | -22% | 0.1% |
| Unit Value AU\$ / Kg | 3.09 | 5.55 | 2.54 | 3.76 | 4.53 | 21% | 10% | 1.22 |
| Singapore | 2,012 | 1,102 | 1,135 | 89 | 373 | 318% | -34% | 0.0% |
| Value Million AUD | 5.89 | 4.64 | 2.79 | 0.34 | 1.12 | 230% | -34% | 0.0% |
| Unit Value AU\$ / Kg | 2.93 | 4.20 | 2.46 | 3.81 | 3.01 | -21% | 1% | 0.81 |
| United States | 830,261 | 884,628 | 992,038 | 857,881 | 1,054,395 | 23% | 6% | 85.9% |
| Value Million AUD | 2601.75 | 3873.32 | 2574.53 | 3865.22 | 3919.73 | 1% | 11% | 86.1% |
| Unit Value AU\$ / Kg | 3.13 | 4.38 | 2.60 | 4.51 | 3.72 | -17% | 4% | 1.00 |
| Canada | 88,616 | 88,354 | 93,879 | 86,555 | 83,709 | -3% | -1% | 6.8% |
| Value Million AUD | 286.77 | 402.68 | 245.13 | 394.10 | 326.34 | -17% | 3% | 7.2% |
| Unit Value AU\$ / Kg | 3.24 | 4.56 | 2.61 | 4.55 | 3.90 | -14% | 5% | 1.05 |
| EUROPE | 40,700 | 57,967 | 69,067 | 39,207 | 32,974 | -16% | -5% | 2.7% |
| Value Million AUD | 125.12 | 235.50 | 169.38 | 144.46 | 100.89 | -30% | -5% | 2.2% |
| Unit Value AU\$ / Kg | 3.07 | 4.06 | 2.45 | 3.68 | 3.06 | -17% | 0% | 0.83 |
| MIDDLE EAST | 2,112 | 3,050 | 5,142 | 3,462 | 2,925 | -16% | 8% | 0.2% |
| Value Million AUD | 6.85 | 12.16 | 13.33 | 15.02 | 9.85 | -34% | 10% | 0.2% |
| Unit Value AU\$ / Kg | 3.24 | 3.99 | 2.59 | 4.34 | 3.37 | -22% | 1% | 0.91 |
| All other | 24,491 | 26,583 | 46,443 | 15,381 | 15,078 | -2% | -11% | 1.2% |
| Value Million AUD | 71.83 | 111.42 | 117.88 | 62.31 | 58.63 | -6% | -5% | 1.3% |
| Unit Value AU\$ / Kg | 2.93 | 4.19 | 2.54 | 4.05 | 3.89 | -4% | 7% | 1.05 |
| Trade to Asia | | | | | | | | |
| Asia | 73,145 | 63,528 | 74,146 | 34,690 | 38,465 | 11% | -15% | 3.1% |
| Value Million AUD | 240.93 | 300.09 | 191.53 | 148.18 | 135.46 | -9% | -13% | 3.0% |
| Unit Value AU\$ / Kg | 3.29 | 4.72 | 2.58 | 4.27 | 3.52 | -18% | 2% | 0.95 |
| Rest of World | 983,122 | 1,057,834 | 1,200,531 | 1,002,485 | 1,189,081 | 19% | 5% | 96.9% |
| Value Million AUD | 3,083.9 | 4,623.4 | 3,105.9 | 4,481.1 | 4,415.4 | -1% | 9% | 97.0% |
| Unit Value AU\$ / Kg | 3.14 | 4.37 | 2.59 | 4.47 | 3.71 | -17% | 4% | 1.00 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Even though Mexico is the largest supplier of avocados to Japan, Asia represents 3.1 per cent of the total avocado exports from Mexico.

Avocados from Mexico coordinates the marketing activities for the Mexican Hass Avocados Importers Association, and The Association of Growers and Packers of Avocados from Mexico that represent the Avocados from Mexico business in the United States.

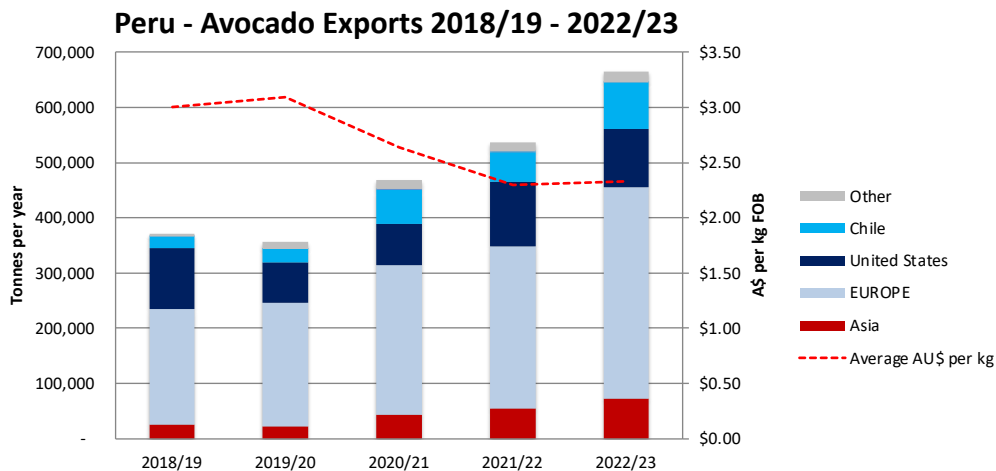




Peru

Peru is the world’s second largest exporter of avocados and the largest in the southern hemisphere. In 2021 Peru produced some 777,000 tonnes of avocados according to FAOSTAT. The Hass avocado is mainly grown in the regions of La Libertad, Lambayeque, Ancash, Cusco, Apurimac and Huancavelica.

Export growth is tracking at 16 per cent per year over the last 5 years. In 2022/23 Peru exported 664,492 tonnes of avocados with an average export FOB unit value of AU\$2.33 per kg (Table 3.1). Europe was the main destination accounting for 58 per cent of all exports by volume followed by the United States with 22 per cent share. Peru exports 11 per cent of their avocado exports to Asia.

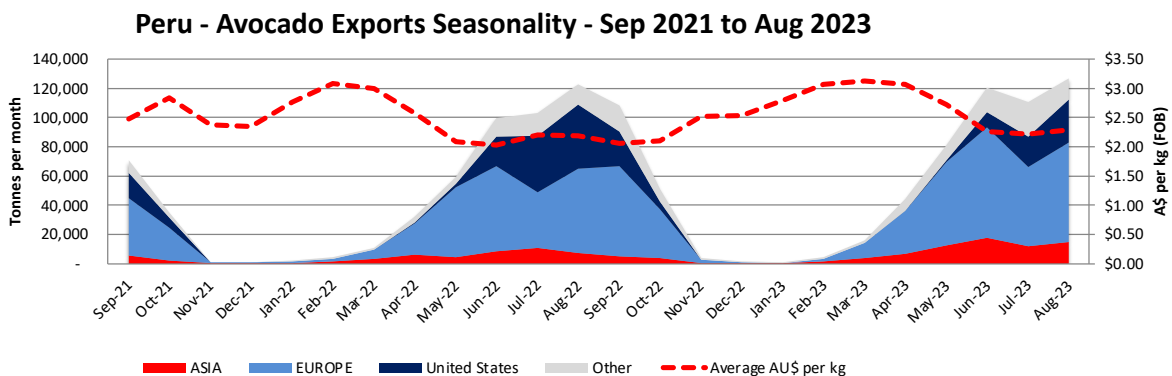


Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 3.1 Peru avocado exports by yearly volume 2018/19 – 2022/23 and FOB unit value (AU\$ equivalent)

The harvest season runs from March to August (Figure 3.2). Peru gained access to Japan in 2014 and is complementing the Mexican supply to Japan from May to August. The volume to Japan and lifted 24 per cent to 15,076 tonnes. Peru commenced supplying to mainland China from 2016 and increased 71 per cent last year to 34,519 tonnes (Table 3.1).

The seasonal supply pattern suggests that Peru is not able to export avocados to Australia during the summer season when Australian prices are traditionally higher, and demand is stronger since Peru’s season is aligned to Australia’s Queensland season.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 3.2 Peru avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 3.1 Peru avocado exports by volume, FOB value and unit value by market 2017/18 – 2021/22

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|---------|---------|---------|---------|---------|----------|------------|---------------|
| Volume Tonnes | 371,848 | 355,958 | 467,838 | 536,935 | 664,492 | 24% | 16% | 100% |
| Value Million AUD | 1,116.8 | 1,102.4 | 1,234.9 | 1,234.2 | 1,550.0 | 26% | 9% | 100% |
| Unit Value AU\$ / Kg | 3.00 | 3.10 | 2.64 | 2.30 | 2.33 | 1% | -6% | 1.00 |
| China | 13,592 | 10,484 | 12,168 | 20,204 | 34,519 | 71% | 26% | 5.2% |
| Value Million AUD | 45.5 | 35.3 | 34.7 | 51.3 | 91.0 | 77% | 19% | 5.9% |
| Unit Value AU\$ / Kg | 3.35 | 3.37 | 2.85 | 2.54 | 2.64 | 4% | -6% | 1.13 |
| Japan | 6,629 | 6,132 | 10,789 | 12,127 | 15,076 | 24% | 23% | 2.3% |
| Value Million AUD | 24.6 | 22.9 | 34.4 | 38.9 | 44.8 | 15% | 16% | 2.9% |
| Unit Value AU\$ / Kg | 3.71 | 3.74 | 3.19 | 3.21 | 2.97 | -7% | -5% | 1.27 |
| Hong Kong | 5,186 | 3,546 | 9,895 | 10,595 | 11,921 | 13% | 23% | 1.8% |
| Value Million AUD | 17.48 | 13.36 | 31.41 | 28.98 | 32.95 | 14% | 17% | 2.1% |
| Unit Value AU\$ / Kg | 3.37 | 3.77 | 3.17 | 2.74 | 2.76 | 1% | -5% | 1.19 |
| Korea, South | 0 | 1,499 | 9,754 | 10,242 | 9,392 | -8% | 2518% | 1.4% |
| Value Million AUD | 0.00 | 5.52 | 30.48 | 31.08 | 27.64 | -11% | 3052% | 1.8% |
| Unit Value AU\$ / Kg | 1.40 | 3.68 | 3.13 | 3.03 | 2.94 | -3% | 20% | 1.26 |
| Thailand | 14 | 440 | 864 | 750 | 758 | 1% | 171% | 0.1% |
| Value Million AUD | 0.06 | 1.78 | 3.15 | 2.73 | 3.05 | 12% | 167% | 0.2% |
| Unit Value AU\$ / Kg | 4.29 | 4.04 | 3.64 | 3.63 | 4.02 | 11% | -2% | 1.72 |
| India | 152 | 122 | 230 | 94 | 10 | -89% | -49% | 0.0% |
| Value Million AUD | 0.57 | 0.52 | 0.69 | 0.22 | 0.05 | -77% | -46% | 0.0% |
| Unit Value AU\$ / Kg | 3.74 | 4.26 | 2.98 | 2.36 | 4.90 | 108% | 7% | 2.10 |
| EUROPE | 208,871 | 224,087 | 270,526 | 294,219 | 384,168 | 31% | 16% | 57.8% |
| Value Million AUD | 588.49 | 692.81 | 721.70 | 616.12 | 895.71 | 45% | 11% | 57.8% |
| Unit Value AU\$ / Kg | 2.82 | 3.09 | 2.67 | 2.09 | 2.33 | 11% | -5% | 1.00 |
| United States | 110,040 | 72,545 | 75,743 | 116,470 | 105,388 | -10% | -1% | 15.9% |
| Value Million AUD | 378.64 | 242.72 | 200.65 | 326.44 | 254.37 | -22% | -9% | 16.4% |
| Unit Value AU\$ / Kg | 3.44 | 3.35 | 2.65 | 2.80 | 2.41 | -14% | -8% | 1.03 |
| Chile | 21,981 | 23,965 | 61,430 | 54,746 | 84,116 | 54% | 40% | 12.7% |
| Value Million AUD | 46.00 | 48.43 | 135.77 | 96.65 | 153.96 | 59% | 35% | 9.9% |
| Unit Value AU\$ / Kg | 2.09 | 2.02 | 2.21 | 1.77 | 1.83 | 4% | -3% | 0.78 |
| All other | 5,383 | 13,140 | 16,441 | 17,487 | 19,144 | 9% | 37% | 2.9% |
| Value Million AUD | 15 | 39 | 42 | 42 | 46 | 11% | 32% | 3.0% |
| Unit Value AU\$ / Kg | 2.87 | 2.97 | 2.55 | 2.39 | 2.43 | 2% | -4% | 1.04 |
| Trade to Asia | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
| Asia | 25,458 | 22,101 | 43,469 | 53,919 | 71,684 | 33% | 30% | 10.8% |
| Value Million AUD | 87.80 | 78.89 | 134.15 | 153.00 | 199.49 | 30% | 23% | 12.9% |
| Unit Value AU\$ / Kg | 3.45 | 3.57 | 3.09 | 2.84 | 2.78 | -2% | -5% | 1.19 |
| Rest of World | 346,390 | 333,857 | 424,369 | 483,016 | 592,809 | 23% | 14% | 89.2% |
| Value Million AUD | 1,029.0 | 1,023.5 | 1,100.8 | 1,081.2 | 1,350.5 | 25% | 7% | 87.1% |
| Unit Value AU\$ / Kg | 2.97 | 3.07 | 2.59 | 2.24 | 2.28 | 2% | -6% | 0.98 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Peru exported 10.8 per cent of its exports to Asia, mostly Japan, China, South Korea, and Hong Kong.

Prohass is an association that represents that Hass avocado industry Peru. Its objectives are to promote the development of national production, retain and open new international markets and promote the consumption of Peruvian Hass avocados in international markets. In the United States the Peruvian Avocado Commission (PAC) promotes consumption of Peruvian avocados via retail and public relations activities under the oversight of the U.S. Department of Agriculture.



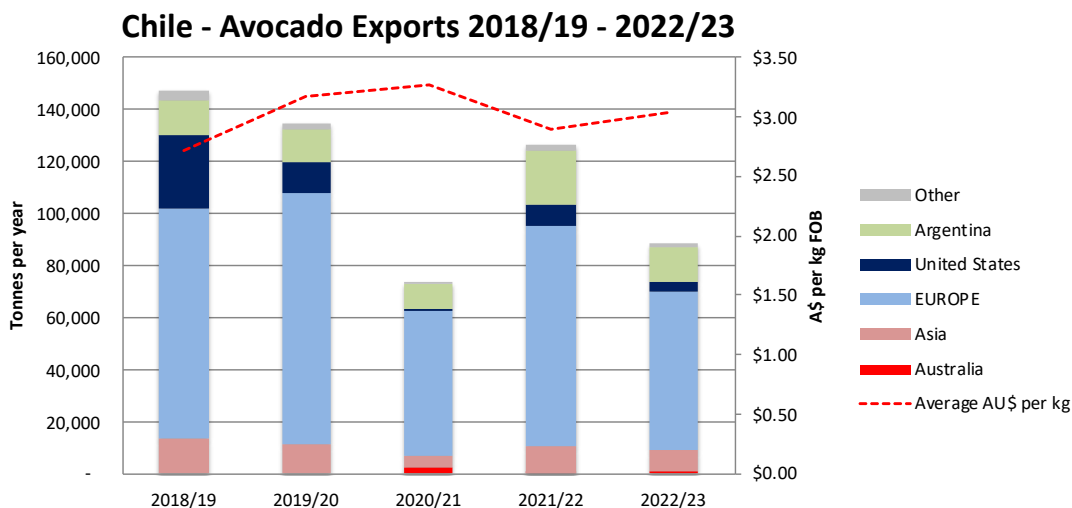


Chile

Chile's position as a major avocado producer in South America has been declining due to harsh drought conditions, and the increased competition from Peru, Colombia and Brazil. While in 2021 Chile produced 220,000 tonnes of avocados, an increase of 36 per cent the Chilean Avocado Committee data estimates the 2022/23 crop has declined to 186,000 tonnes due to more unfavourable weather conditions including a severe spring frost that caused some farms to lose their entire crop. Water demands for avocado production in Chile remain a major long term environmental challenge.

In 2022/23 Chile exported 88,413 tonnes of avocados with an average export FOB unit value of AU\$3.05 per kg (Table 4.1). The volume was 30 per cent lower than in 2021/22. Of this Europe accounted for 67 per cent of Chilean avocado exports. Chile exported 3,879 tonnes to the United States, falling 50 per cent in the year. Exports to China dropped 18 per cent per cent. Trade to Hong Kong was just 139 tonnes. There has been no recorded trade to Japan from Chile since 2019.

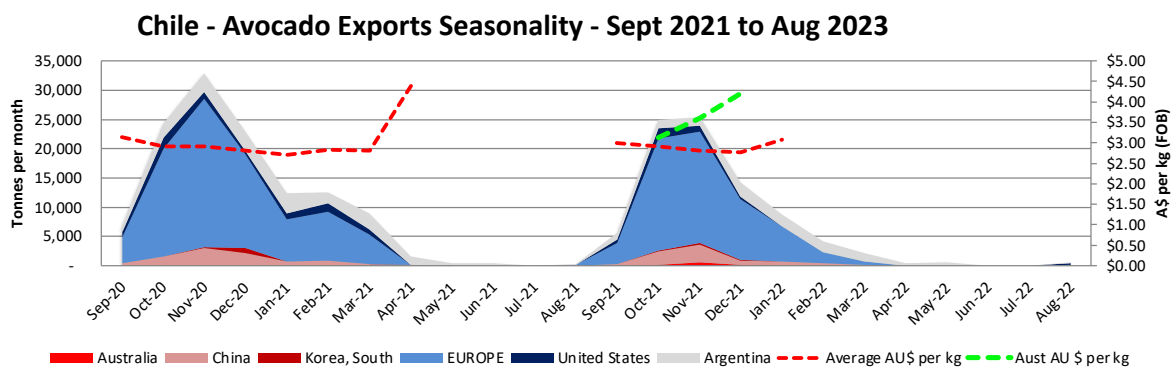
Chile exported 845 tonnes to Australia in December.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 4.1 Chile avocado exports by yearly volume 2017/18 – 2021/22 and FOB unit value (AU\$ equivalent)

The Chilean export season runs from October to February (Figure 4.2)



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 4.2 Chile avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 4.1 Chile avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|----------------|----------------|---------------|----------------|---------------|--------------|-------------|---------------|
| Volume Tonnes | 147,019 | 134,847 | 74,041 | 126,775 | 88,413 | -30% | -12% | 100% |
| Value Million AUD | 400.3 | 427.7 | 242.2 | 368.0 | 269.3 | -27% | -9% | 100% |
| Unit Value AU\$ / Kg | 2.72 | 3.17 | 3.27 | 2.90 | 3.05 | 5% | 3% | 1.00 |
| Australia | - | - | 2,522 | 42 | 845 | 1902% | | 1.0% |
| Value Million AUD | - | - | 11.2 | 0.2 | 3.0 | 1881% | | 1.1% |
| Unit Value AU\$ / Kg | | | 4.44 | 3.65 | 3.61 | -1% | | 1.18 |
| China | 13,238 | 10,654 | 3,915 | 9,136 | 7,525 | -18% | -13% | 8.5% |
| Value Million AUD | 37.4 | 36.0 | 15.0 | 31.6 | 28.4 | -10% | -7% | 10.6% |
| Unit Value AU\$ / Kg | 2.83 | 3.38 | 3.84 | 3.46 | 3.78 | 9% | 8% | 1.24 |
| Hong Kong | 377 | 336 | 261 | 177 | 139 | -22% | -22% | 0.2% |
| Value Million AUD | 1.43 | 1.58 | 1.11 | 0.71 | 0.59 | -16% | -20% | 0.2% |
| Unit Value AU\$ / Kg | 3.80 | 4.69 | 4.27 | 3.99 | 4.28 | 7% | 3% | 1.41 |
| Korea, South | | | 295 | 1,051 | 779 | -26% | | 0.9% |
| Value Million AUD | | | 1.38 | 4.29 | 3.09 | -28% | | 1.1% |
| Unit Value AU\$ / Kg | | | 4.67 | 4.08 | 3.97 | -3% | | 1.30 |
| EUROPE | 88,238 | 96,034 | 55,521 | 85,096 | 60,657 | -29% | -9% | 68.6% |
| Value Million AUD | 224.06 | 292.40 | 164.88 | 231.87 | 160.54 | -31% | -8% | 59.6% |
| Unit Value AU\$ / Kg | 2.54 | 3.04 | 2.97 | 2.72 | 2.65 | -3% | 1% | 0.87 |
| United States | 27,978 | 12,211 | 955 | 7,777 | 3,879 | -50% | -39% | 4.4% |
| Value Million AUD | 87.24 | 46.32 | 3.38 | 26.46 | 14.90 | -44% | -36% | 5.5% |
| Unit Value AU\$ / Kg | 3.12 | 3.79 | 3.54 | 3.40 | 3.84 | 13% | 5% | 1.26 |
| Argentina | 13,445 | 12,886 | 9,251 | 20,874 | 13,127 | -37% | -1% | 14.8% |
| Value Million AUD | 35.76 | 40.21 | 39.83 | 63.77 | 53.49 | -16% | 11% | 19.9% |
| Unit Value AU\$ / Kg | 2.66 | 3.12 | 4.31 | 3.06 | 4.07 | 33% | 11% | 1.34 |
| All other | 3,743 | 2,726 | 1,320 | 2,622 | 1,464 | -44% | -21% | 1.7% |
| Value Million AUD | 14.36 | 11.22 | 5.35 | 9.13 | 5.21 | -43% | -22% | 1.9% |
| Unit Value AU\$ / Kg | 3.84 | 4.12 | 4.05 | 3.48 | 3.56 | 2% | -2% | 1.17 |
| Trade to Asia | | | | | | | | |
| Asia | 13,734 | 11,564 | 4,471 | 10,364 | 8,464 | -18% | -11% | 9.6% |
| Value Million AUD | 39.09 | 39.92 | 17.53 | 36.63 | 32.22 | -12% | -5% | 12.0% |
| Unit Value AU\$ / Kg | 2.85 | 3.45 | 3.92 | 3.53 | 3.81 | 8% | 8% | 1.25 |
| Rest of World | 133,285 | 123,284 | 69,570 | 116,411 | 79,949 | -31% | -12% | 90.4% |
| Value Million AUD | 361.2 | 387.8 | 224.6 | 331.4 | 237.1 | -28% | -10% | 88.0% |
| Unit Value AU\$ / Kg | 2.71 | 3.15 | 3.23 | 2.85 | 2.97 | 4% | 2% | 0.97 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Chile exports less than 10 per cent of exports volume to Asian markets, mainly China and is decreasing 11 per cent per year over 5 years.

Association

The Hass Avocado Committee is a committee of the ASOCIACIÓN DE EXPORTADORES DE CHILE A.G (ASOEX) and oversees the market development and promotion of Chilean Hass avocados globally. In the United States, the Chilean Avocado Importers Association represents Chilean avocado importers, exporters, and producers to conduct market development activities and promotions that increase the consumption of Chilean Hass Avocados in the United States. The association operates under the guidelines of the Hass Avocado Promotion, Research and Information Order.

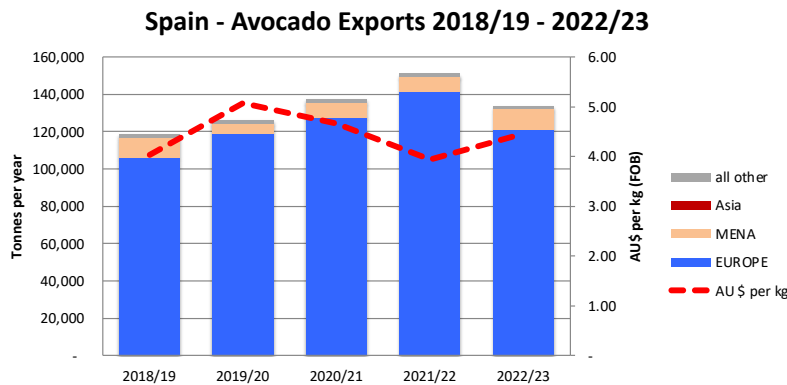




Spain

Spain is the largest avocado producer in Europe and exports mostly to other European countries. In 2021 Spain produced 117,000 tonnes of avocados according to FAOSTAT.

In 2022/23 Spain exported 133,340 tonnes of avocados, including re exports, with an average export FOB unit value of AU\$4.46 per kg (Table 5.1). Almost all exports are to other European destinations or Morocco in the MENA area.

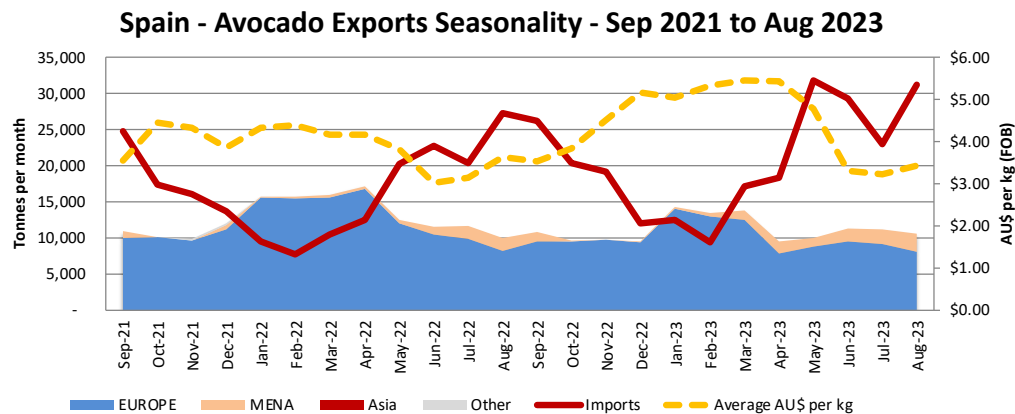


Source :IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 5.1 Spain avocado exports by yearly volume 2018/19 – 2022/23 and FOB unit value (AU\$ equivalent)

Spain exports avocados all year round although the main export season is from December to April (Figure 5.2). The recorded exports were higher than production since Spain also imported 182,000 tonnes of avocados from outside of Europe, mostly Peru and Morocco, and re-exported a significant volume particularly between April and October. Spain has become known as an avocado HUB in Europe and maintains a year-round supply to customers by importing avocados to supplement local production and match their year-round demand.

The export of local production is mixed with imports, with local production exported from January to April and supplemented by re exports, mostly originating in Peru in other periods (Figure 5.2)



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 5.2 Spain avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 5.1 Spain avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|----------------|----------------|----------------|----------------|----------------|-------------|-------------|---------------|
| Volume Tonnes | 118,820 | 126,433 | 137,491 | 151,160 | 133,440 | -12% | 3% | 100% |
| Value Million AUD | 480.1 | 641.7 | 642.0 | 596.4 | 595.8 | 0% | 6% | 100% |
| Unit Value AU\$ / Kg | 4.04 | 5.08 | 4.67 | 3.95 | 4.46 | 13% | 3% | 1.00 |
| EUROPE | 106,120 | 119,032 | 127,706 | 141,693 | 120,996 | -15% | 3% | 90.7% |
| Value Million AUD | 463.0 | 628.2 | 622.7 | 580.8 | 573.9 | -1% | 6% | 96.3% |
| Unit Value AU\$ / Kg | 4.36 | 5.28 | 4.88 | 4.10 | 4.74 | 16% | 2% | 1.06 |
| MENA | 10,499 | 5,430 | 7,492 | 7,517 | 11,273 | 50% | 2% | 8.4% |
| Value Million AUD | 10.8 | 5.5 | 8.6 | 8.4 | 16.4 | 95% | 11% | 2.7% |
| Unit Value AU\$ / Kg | 1.03 | 1.01 | 1.15 | 1.12 | 1.45 | 30% | 9% | 0.33 |
| Asia | 21 | 40 | 35 | 17 | 12 | -27% | -13% | 0.0% |
| Value Million AUD | 0.1 | 0.2 | 0.2 | 0.1 | 0.2 | 32% | 14% | 0.0% |
| Unit Value AU\$ / Kg | 4.58 | 6.20 | 5.86 | 7.27 | 13.15 | 81% | 30% | 2.95 |
| All other | 2,179 | 1,932 | 2,258 | 1,933 | 1,158 | -40% | -15% | 0.9% |
| Value Million AUD | 6.2 | 7.8 | 10.5 | 7.0 | 5.3 | -24% | -4% | 0.9% |
| Unit Value AU\$ / Kg | 2.82 | 4.02 | 4.67 | 3.61 | 4.60 | 27% | 13% | 1.03 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

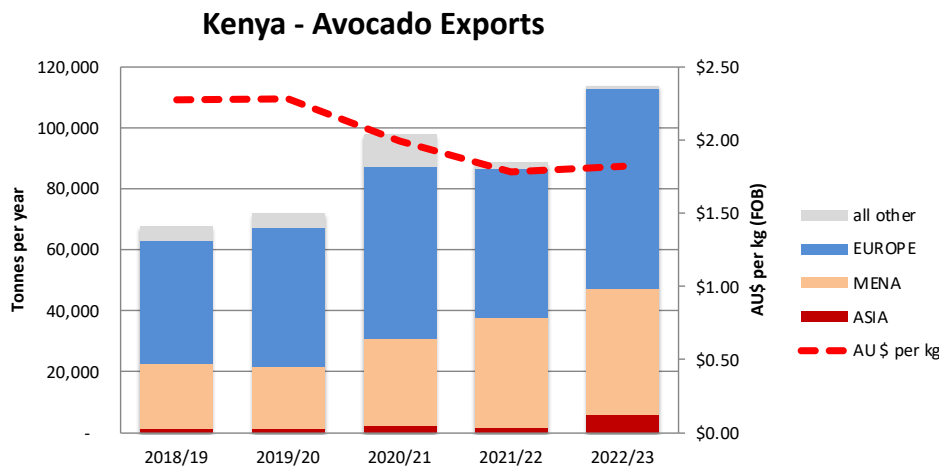




Kenya

Kenya is now the largest producer and exporter of avocados in Africa and is building trade mostly to Europe and Middle East. In 2021 Kenya produced 416,000 tonnes of avocados according to FAOSTAT, increasing 21 per cent average annual growth over 5 years. Kenya has seen farmers abandoning their traditional crops in favour of avocados with stronger and more lucrative export opportunities (CNN 2020).

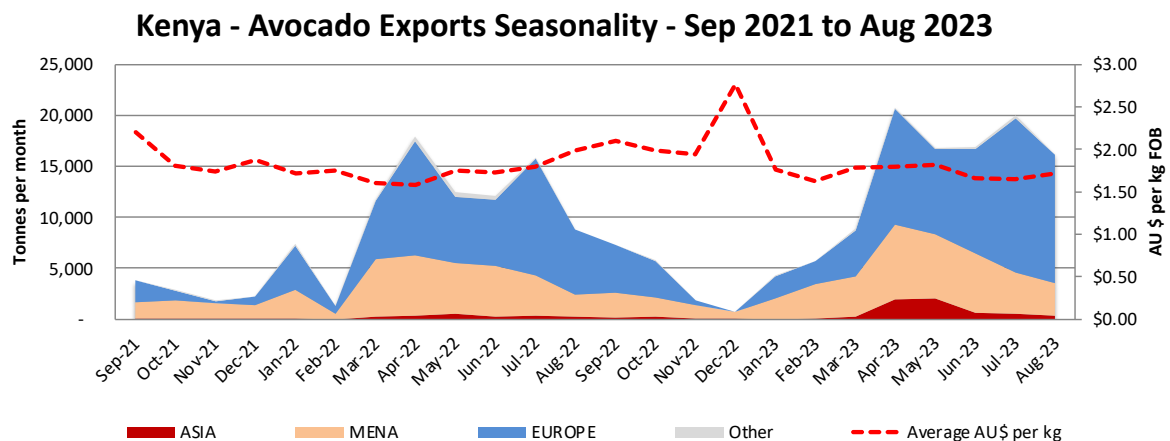
In 2022/23 Kenya exported 113,815 tonnes of avocados with a notably low average export FOB unit value of AU\$1.82 per kg (Table 6.1). Europe was the main destination region accounting for 58 per cent of all exports by volume followed by Middle East / North African markets at 36 per cent, and 5 per cent to South-East Asian markets. Exports to Asia increased 265 per cent to 6,025 tonnes mainly due to rapid growth in trade to China after gaining access in 2020.



Source :IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 6.1 Kenya avocado exports by yearly volume 2018/19 – 2022/23 and FOB unit value (AU\$ equivalent)

Kenya exports avocados mostly from February to September (Figure 6.2).



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 6.2 Kenya avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 6.1 Kenya avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|---------|---------|---------|---------|---------|----------|------------|---------------|
| Volume Tonnes | 67,736 | 71,979 | 97,889 | 88,675 | 113,815 | 28% | 14% | 100% |
| Value Million AUD | 154.2 | 164.2 | 195.3 | 157.9 | 207.5 | 31% | 8% | 100% |
| Unit Value AU\$ / Kg | 2.28 | 2.28 | 1.99 | 1.78 | 1.82 | 2% | -5% | 1.00 |
| ASIA | 1,253 | 1,264 | 2,448 | 1,650 | 6,025 | 265% | 48% | 5.3% |
| Value Million AUD | 4.4 | 4.4 | 6.5 | 4.2 | 15.6 | 270% | 37% | 7.5% |
| Unit Value AU\$ / Kg | 3.54 | 3.50 | 2.64 | 2.56 | 2.60 | 1% | -7% | 1.42 |
| MENA | 21,478 | 20,512 | 28,337 | 35,909 | 41,230 | 15% | 18% | 36.2% |
| Value Million AUD | 42.2 | 43.1 | 49.5 | 56.7 | 67.5 | 19% | 12% | 32.6% |
| Unit Value AU\$ / Kg | 1.97 | 2.10 | 1.75 | 1.58 | 1.64 | 4% | -4% | 0.90 |
| EUROPE | 40,340 | 45,272 | 56,389 | 48,851 | 65,658 | 34% | 13% | 57.7% |
| Value Million AUD | 98.5 | 107.8 | 118.8 | 91.1 | 122.8 | 35% | 6% | 59.2% |
| Unit Value AU\$ / Kg | 2.44 | 2.38 | 2.11 | 1.87 | 1.87 | 0% | -6% | 1.03 |
| All other | 4,664 | 4,931 | 10,715 | 2,264 | 902 | -60% | -34% | 0.8% |
| Value Million AUD | 9.0 | 8.8 | 20.5 | 5.8 | 1.5 | -74% | -36% | 0.7% |
| Unit Value AU\$ / Kg | 1.93 | 1.79 | 1.91 | 2.56 | 1.66 | -35% | -4% | 0.91 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 6.3 Kenya farmers shift to avocado production.



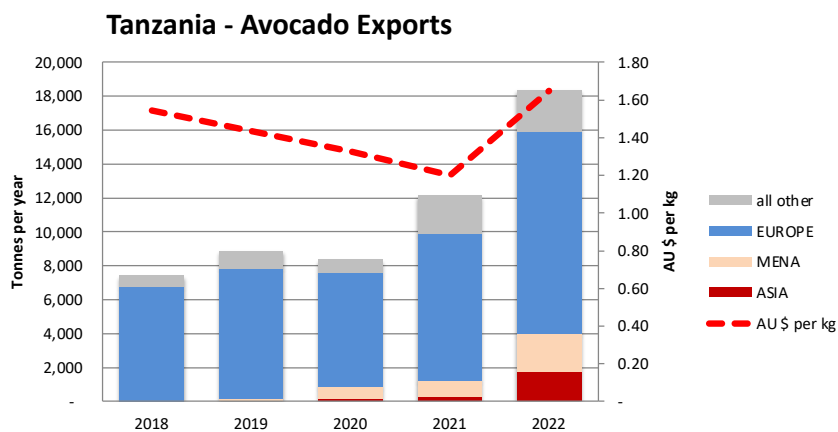


Tanzania

Tanzania is an upcoming producer of avocados in central Africa supplementing volumes to Europe from nearby Kenya. Avocados are a relatively new crop that Tanzania started exporting in 2009.

Assessing reliable production of avocados is difficult with wildly varying estimates however Tanzania appears to produce between 20 - 40,000 tonnes of avocados annually and is expanding rapidly. Tanzania is the third-largest producer in Africa after South Africa and Kenya. Tanzania's avocado industry is the fastest-growing subsector in the horticultural industry, with production projected to double in the next 3 years due to readily available land.

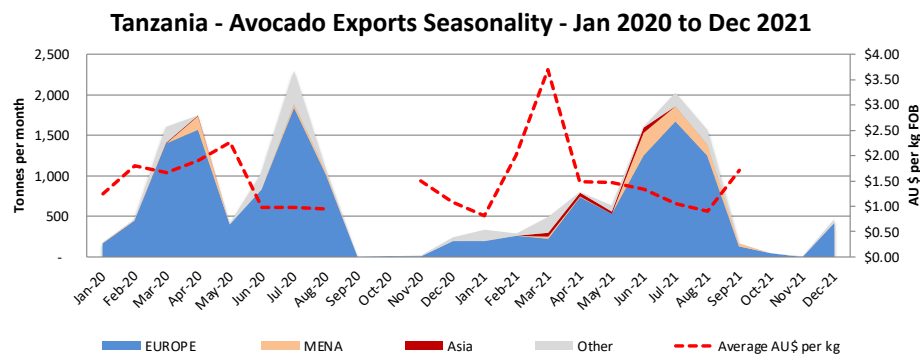
In 2022 Tanzania exported 18,387 tonnes of avocados with a notably low average export FOB unit value of AU\$1.65 per kg (Table 7.1). Europe was the main destination region accounting for 65 per cent of all exports by volume followed by Middle East / North African markets 12 per cent and 10 per cent to Asian markets including India. Of the 1,751 tonnes sent to Asian markets, 87 per cent were exported to India where Tanzania has achieved over 75 per cent market share in its first year of trade to India.



Source :ITC Trademap; Fresh Intelligence analysis

Figure 7.1 Avocado exports by yearly volume 2018 – 2022 and FOB unit value (AU\$ equivalent)

Avocados are grown in middle and highland areas with cool temperatures ranging from 10°C to 23°C, 600m to 3000m above sea level and with rainfall ranging from 600 to 1600mm. They are mostly grown in Arusha, Kilimanjaro, Mbeya, Songwe and Njombe regions and are harvested from March to August.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 7.2 Avocado exports seasonality by month and average FOB unit value (AU\$ equivalent)

Table 7.1 Avocado exports by volume, FOB value and unit value by market 2018 – 2022

| | 2018 | 2019 | 2020 | 2021 | 2022 | 1 yr chg | 5 yr trend | 2022 share |
|----------------------|-------|-------|-------|--------|--------|----------|------------|------------|
| Volume Tonnes | 7,428 | 8,856 | 8,374 | 12,126 | 18,387 | 52% | 25% | 100% |
| Value Million AUD | 11.5 | 12.7 | 11.1 | 14.5 | 30.3 | 108% | 27% | 100% |
| Unit Value AU\$ / Kg | 1.54 | 1.44 | 1.33 | 1.20 | 1.65 | 37% | 2% | 1.00 |
| India | | | | | 1,524 | | | 8.3% |
| Value Million AUD | | | | | 2.3 | | | 7.7% |
| Unit Value AU\$ / Kg | | | | | 1.53 | | | 0.93 |
| China | 24 | | 66 | 203 | 198 | -2% | 69% | 1.1% |
| Value Million AUD | 0.0 | | 0.1 | 0.3 | 0.5 | 72% | 84% | 1.5% |
| Unit Value AU\$ / Kg | 1.71 | | 1.42 | 1.34 | 2.37 | 76% | 9% | 1.44 |
| Singapore | | 3 | 114 | 89 | 29 | -67% | | 0.2% |
| Value Million AUD | | 0.00 | 0.18 | 0.12 | 0.08 | -31% | | 0.3% |
| Unit Value AU\$ / Kg | | 1.33 | 1.56 | 1.33 | 2.79 | 111% | | 1.70 |
| MENA | 10 | 281 | 696 | 922 | 2,279 | 147% | 289% | 12.4% |
| Value Million AUD | 0.01 | 0.23 | 1.06 | 1.31 | 4.82 | 268% | 395% | 15.9% |
| Unit Value AU\$ / Kg | 0.80 | 0.80 | 1.53 | 1.42 | 2.11 | 49% | 27% | 1.28 |
| EUROPE | 6,703 | 7,661 | 6,675 | 8,681 | 11,880 | 37% | 15% | 64.6% |
| Value Million AUD | 11.06 | 11.78 | 9.17 | 11.22 | 17.48 | 56% | 12% | 57.7% |
| Unit Value AU\$ / Kg | 1.65 | 1.54 | 1.37 | 1.29 | 1.47 | 14% | -3% | 0.89 |
| All other | 691 | 911 | 823 | 2,231 | 2,477 | 11% | 38% | 13.5% |
| Value Million AUD | 0.37 | 0.71 | 0.62 | 1.61 | 5.12 | 217% | 93% | 16.9% |
| Unit Value AU\$ / Kg | 0.54 | 0.78 | 0.76 | 0.72 | 2.07 | 186% | 40% | 1.25 |

Source: ITC Trademap; Fresh Intelligence analysis

Tanzania exported over 1,500 tonnes of avocados to India in the first year of access and accounted for over 75 per cent of India's avocados imports, effectively pushing out Peru and New Zealand.





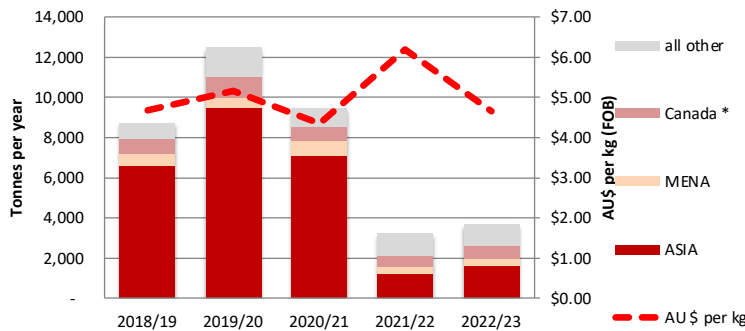
United States

The United States is a net importer of avocados. In 2021 the United States produced around 136,000 tonnes of avocados according to FAOSTAT, mostly in California. Production is declining 5 per cent per year over 5 years, influenced by the Californian drought and growers reducing avocado production in favour of less water reliant crops. The US imported over 1 million tonnes mostly from Mexico and other Latin American suppliers to supplement local production.

In 2022/23 the United States recorded exports of 60,000 tonnes of avocados however when adjusted to remove re-exported Mexican avocados to Canada the more indicative export figure was just 3,682 tonnes with an average export FOB unit value of AU\$4.65 per kg (Table 7.1). Most of the production is consumed in the domestic market.

Trade to most Asian markets including South Korea, Japan and Taiwan had dropped up to 70 per cent or more in 2021/22 and scarcely lifted above these levels. The lower prices offered to these markets from Mexico and Peru, and the strong domestic demand is reducing demand for US avocados in Asia.

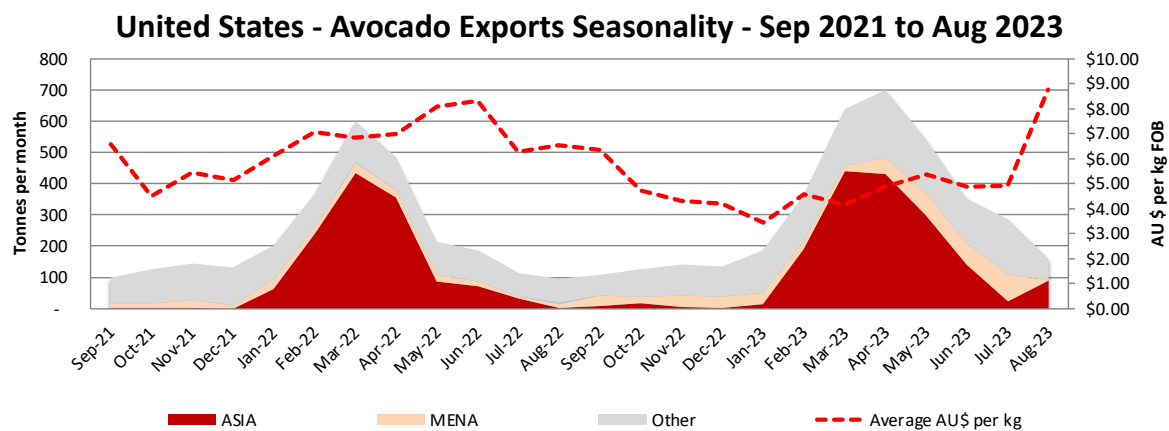
United States - Avocado Exports



Source :IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 8.1 United States avocado exports by yearly volume 2017/18 – 2021/22 and FOB unit value (AU\$ equivalent) adjusted to exclude re exports from Mexico to Canada

The United States exports avocados mainly from February to June, although there is year-round trade with some Mexican avocados being re-exported to Bahamas and Caribbean areas. (Figure 7.2).



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 8.2 United States avocado exports seasonality and average FOB unit value (AU\$ equivalent) excluding re export to Canada

Table 8.1 United States avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23 – adjusted to remove reexports to Canada.

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|----------------|----------------|----------------|----------------|----------------|-----------------|-------------------|----------------------|
| Volume Tonnes | 8,696 | 12,474 | 9,469 | 3,240 | 3,682 | 14% | -19% | 100% |
| Value Million AUD | 40.8 | 64.5 | 41.3 | 20.1 | 17.1 | -15% | -19% | 100% |
| Unit Value AU\$ / Kg | 4.69 | 5.17 | 4.36 | 6.19 | 4.65 | -25% | 0% | 1.00 |
| Canada * | 766 | 1,049 | 663 | 551 | 588 | 7% | -6% | 16.0% |
| Value Million AUD | 4.1 | 4.0 | 2.4 | 2.4 | 2.2 | -9% | -14% | 13.0% |
| Unit Value AU\$ / Kg | 5.29 | 3.84 | 3.57 | 4.42 | 3.77 | -15% | -8% | 0.81 |
| Korea, South | 4,091 | 3,709 | 2,733 | 802 | 526 | -34% | -40% | 14.3% |
| Value Million AUD | 18.6 | 20.1 | 12.6 | 5.7 | 2.1 | -64% | -42% | 12.1% |
| Unit Value AU\$ / Kg | 4.54 | 5.43 | 4.62 | 7.11 | 3.93 | -45% | -4% | 0.84 |
| Taiwan | 751 | 781 | 964 | 314 | 516 | 65% | -9% | 14.0% |
| Value Million AUD | 4.23 | 4.22 | 4.49 | 2.42 | 3.46 | 43% | -5% | 20.2% |
| Unit Value AU\$ / Kg | 5.63 | 5.40 | 4.66 | 7.72 | 6.70 | -13% | 4% | 1.44 |
| Hong Kong | 224 | 1,141 | 964 | 13 | 292 | 2105% | 7% | 7.9% |
| Value Million AUD | 1.14 | 6.80 | 3.51 | 0.12 | 1.04 | 798% | -2% | 6.1% |
| Unit Value AU\$ / Kg | 5.11 | 5.96 | 3.64 | 8.75 | 3.56 | -59% | -9% | 0.77 |
| Malaysia | 321 | 208 | 306 | 45 | 142 | 217% | -18% | 3.9% |
| Value Million AUD | 0.83 | 0.73 | 1.15 | 0.34 | 0.82 | 137% | 0% | 4.8% |
| Unit Value AU\$ / Kg | 2.59 | 3.49 | 3.77 | 7.69 | 5.76 | -25% | 22% | 1.24 |
| Singapore | 31 | 656 | 251 | 11 | 72 | 542% | 23% | 2.0% |
| Value Million AUD | 0.17 | 3.48 | 1.32 | 0.10 | 0.43 | 336% | 26% | 2.5% |
| Unit Value AU\$ / Kg | 5.43 | 5.30 | 5.27 | 8.80 | 5.99 | -32% | 2% | 1.29 |
| Japan | 1,151 | 2,965 | 1,662 | 82 | 20 | -76% | -64% | 0.5% |
| Value Million AUD | 5.03 | 15.96 | 7.39 | 0.49 | 0.11 | -77% | -61% | 0.7% |
| Unit Value AU\$ / Kg | 4.37 | 5.38 | 4.45 | 5.98 | 5.67 | -5% | 7% | 1.22 |
| All other | 1,361 | 1,965 | 1,925 | 1,422 | 1,526 | 7% | 3% | 41.4% |
| Value Million AUD | 6.75 | 9.13 | 8.43 | 8.46 | 6.97 | -18% | 1% | 40.7% |
| Unit Value AU\$ / Kg | 4.96 | 4.65 | 4.38 | 5.95 | 4.57 | -23% | -2% | 0.98 |
| Trade to Asia | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
| Asia | 6,601 | 9,510 | 7,063 | 1,271 | 1,584 | 25% | -30% | 43.0% |
| Value Million AUD | 30.19 | 51.78 | 31.22 | 9.21 | 8.04 | -13% | -28% | 47.0% |
| Unit Value AU\$ / Kg | 4.57 | 5.44 | 4.42 | 7.25 | 5.08 | -30% | 3% | 1.09 |
| Rest of World | 2,094 | 2,964 | 2,405 | 1,970 | 2,098 | 6% | 0% | 57.0% |
| Value Million AUD | 10.6 | 12.7 | 10.1 | 10.9 | 9.1 | -16% | -4% | 53.0% |
| Unit Value AU\$ / Kg | 5.05 | 4.28 | 4.19 | 5.52 | 4.33 | -22% | -4% | 0.93 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Exports to Asia accounts for at least 43 per cent of United States exports, and likely higher proportion at the REST of World includes some re exports to Caribbean areas.

The California Avocado Commission's role is to enhance the premium positioning of California avocados through advertising, promotion, and public relations. It engages in related industry activities as the official information source for California avocados and the California avocado industry. There are more than 3,000 growers of avocados in California, the main production state in the United States.

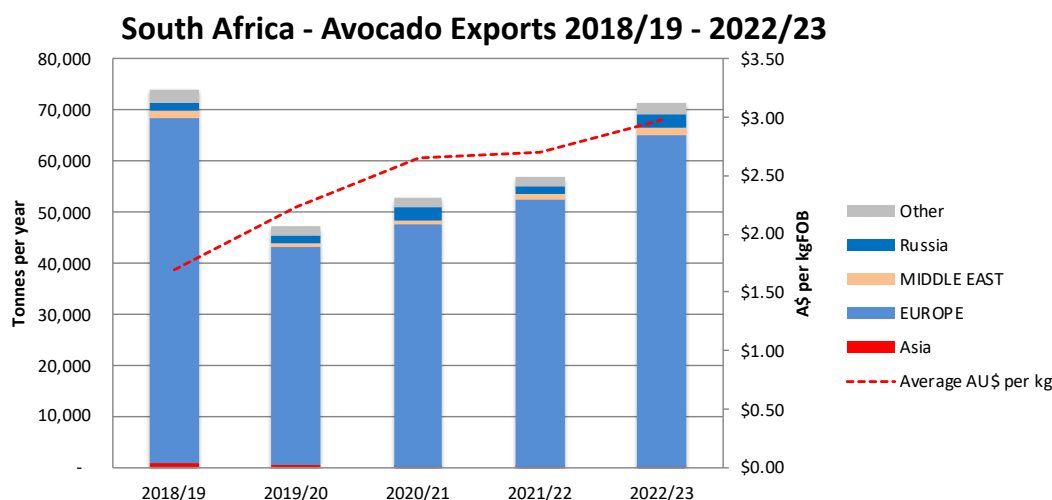




South Africa

South Africa was the largest exporter of avocados in Africa until exceeded by Kenya. In 2021 South Africa produced 82,700 tonnes of avocados according to FAOSTAT dropping over 10 per cent after one favourable year.

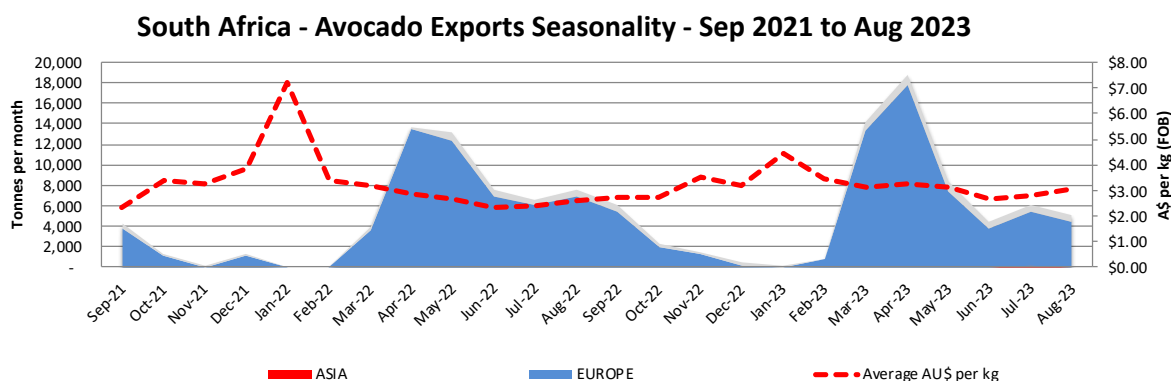
In 2022/23 South Africa exported 71,367 tonnes of avocados, lifting 25 per cent on the previous year with an average export FOB unit value of AU\$2.97 per kg (Table 9.1). Europe was again the main destination accounting for 91 per cent of all exports by volume. Singapore and Malaysia are the only markets in Asia where South Africa exports to and were negligible after Australia’s stronger performance.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 9.1 South Africa avocado exports by yearly volume 2017/18 – 2021/22 and FOB unit value (AU\$ equivalent)

South Africa exports avocados from March to October (Figure 9.2) and competes in Europe with avocados from Kenya and Peru during the same time frame.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 9.2 South Africa avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 9.1 South Africa avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------|---------|---------|---------|---------|---------|----------|------------|---------------|
| Volume Tonnes | 73,798 | 47,165 | 52,843 | 56,950 | 71,367 | 25% | -1% | 100% |
| Value Million AUD | 125.4 | 105.1 | 140.4 | 153.5 | 212.0 | 38% | 14% | 100% |
| Unit Value AU\$ / Kg | 1.70 | 2.23 | 2.66 | 2.70 | 2.97 | 10% | 15% | 1.00 |
| Hong Kong | 231 | 38 | 82 | 42 | 131 | 214% | -13% | 0.2% |
| Value Million AUD | 0.9 | 0.3 | 0.7 | 0.6 | 0.6 | -12% | -11% | 0.3% |
| Unit Value AU\$ / Kg | 3.88 | 7.53 | 8.94 | 15.09 | 4.22 | -72% | 2% | 1.42 |
| Singapore | 398 | 320 | 72 | 29 | 5 | -83% | -67% | 0.0% |
| Value Million AUD | 1.1 | 0.8 | 0.2 | 0.1 | 0.0 | -66% | -61% | 0.0% |
| Unit Value AU\$ / Kg | 2.78 | 2.49 | 2.33 | 2.67 | 5.26 | 97% | 17% | 1.77 |
| Malaysia | 130 | 109 | 65 | 39 | | | | 0.0% |
| Value Million AUD | 0.31 | 0.26 | 0.13 | 0.09 | | | | 0.0% |
| Unit Value AU\$ / Kg | 2.36 | 2.42 | 2.08 | 2.30 | | | | - |
| India | | 1 | 1 | | | | | 0.0% |
| Value Million AUD | | 0.01 | 0.00 | | | | | 0.0% |
| Unit Value AU\$ / Kg | | 6.25 | 0.44 | | | | | - |
| EUROPE | 67,562 | 42,586 | 47,318 | 52,263 | 64,783 | 24% | -1% | 90.8% |
| Value Million AUD | 110.28 | 91.81 | 125.14 | 139.00 | 193.10 | 39% | 15% | 91.1% |
| Unit Value AU\$ / Kg | 1.63 | 2.16 | 2.64 | 2.66 | 2.98 | 12% | 16% | 1.00 |
| Russia | 1,532 | 1,557 | 2,550 | 1,644 | 2,686 | 63% | 15% | 3.8% |
| Value Million AUD | 3.67 | 4.29 | 6.43 | 4.50 | 8.03 | 79% | 22% | 3.8% |
| Unit Value AU\$ / Kg | 2.40 | 2.76 | 2.52 | 2.74 | 2.99 | 9% | 6% | 1.01 |
| MIDDLE EAST | 1,433 | 853 | 750 | 964 | 1,524 | 58% | 2% | 2.1% |
| Value Million AUD | 4.24 | 3.32 | 2.48 | 2.94 | 5.30 | 80% | 6% | 2.5% |
| Unit Value AU\$ / Kg | 2.96 | 3.89 | 3.31 | 3.05 | 3.48 | 14% | 4% | 1.17 |
| All other | 2,512 | 1,699 | 2,006 | 1,971 | 2,238 | 14% | -3% | 3.1% |
| Value Million AUD | 4.86 | 4.30 | 5.32 | 6.30 | 5.05 | -20% | 1% | 2.4% |
| Unit Value AU\$ / Kg | 1.93 | 2.53 | 2.65 | 3.19 | 2.25 | -29% | 4% | 0.76 |
| Trade to Asia | | | | | | | | |
| Asia | 759 | 467 | 253 | 187 | 192 | 3% | -29% | 0.3% |
| Value Million AUD | 2.31 | 1.35 | 1.03 | 0.79 | 0.58 | -27% | -29% | 0.3% |
| Unit Value AU\$ / Kg | 3.04 | 2.89 | 4.08 | 4.24 | 3.00 | -29% | 0% | 1.01 |
| Rest of World | 73,038 | 46,697 | 52,590 | 56,763 | 71,174 | 25% | -1% | 99.7% |
| Value Million AUD | 123.1 | 103.7 | 139.4 | 152.7 | 211.5 | 38% | 14% | 99.7% |
| Unit Value AU\$ / Kg | 1.68 | 2.22 | 2.65 | 2.69 | 2.97 | 10% | 15% | 1.00 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

In 2022/23 South Africa exported just 135 tonnes or 0.2 per cent of their avocado exports to Asia. Europe accounts for 91 per cent.

Association

The South African Avocado Growers Association (SAAGA) works to enable the industry to achieve goals that individuals are unable to achieve on their own.



SAAGA funds production, postharvest and market access related research. SAAGA funds marketing campaigns to increase consumption of avocados through consumer and trade media locally and in Europe, which have helped increase consumer awareness and consumption. SAAGA is a member of the Subtropical Growers' Association (Subtrop).



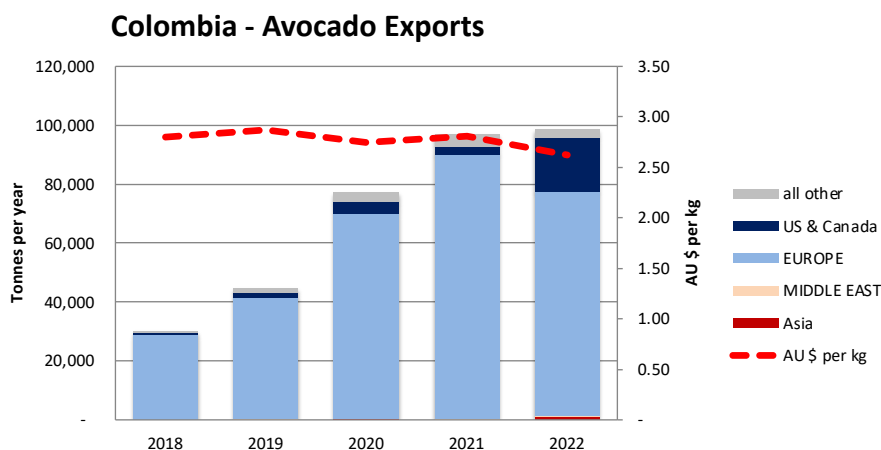
Colombia

Colombia has become the world’s second largest producer of avocados and the largest in South America after recording production approximately 980,000 tonnes according to FAOSTAT, an increase of 33 per cent in one year as new plantations increased yields. This volume now exceeds Peru and Dominican Republic.

In 2022 Colombia exported 98,595 tonnes of avocados with an average recorded export FOB unit value of AU\$2.62 per kg (Table 10.1). Seventy-seven per cent of exports were destined to Europe, and 19 per cent (17,950 tonnes) to United States with the strong growth partially offsetting losses from Mexico in mid 2022. One per cent or 1,076 tonnes were sent to Asia although this was a 10-fold increase with developing trade to China (via Hong Kong) and Japan.

Access to the United States was gained for Colombian avocados in 2017. According to the Californian Avocado Commission the agreement requires utilization and certification of an ongoing systems approach designed to ensure imports do not introduce pests into the United States.

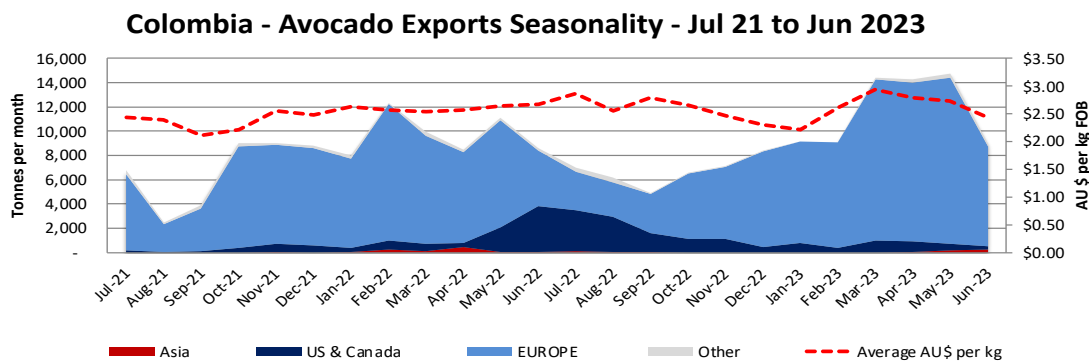
Access to Japan and China concluded in 2019 with first trades in 2020. Access to South Korea was concluded in March 2021 with the first shipment arriving in July 2021 and 74 tonnes in 2022.



Source :ITC Trademap; Fresh Intelligence analysis

Figure 10.1 Colombia States avocado exports by yearly volume 2018 – 2022 and FOB unit value (AU\$ equivalent)

Colombia exports avocados all year round although the main export season is from November to May (Figure 10.2). Average FOB prices are below AU\$3.00 per kg.



Source: ITC TradeMap; Fresh Intelligence analysis

Figure 10.2 Colombia States avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 10.1 Colombia avocado exports by volume, FOB value and unit value by market 2018/19 – 2021/23

| | 2018 | 2019 | 2020 | 2021 | 2022 | 1 yr chg | 5 yr trend | 2022 share |
|------------------------|--------|--------|--------|--------|--------|----------|------------|------------|
| Volume Tonnes | 30,008 | 44,570 | 77,075 | 96,904 | 98,595 | 2% | 35% | 100% |
| Value Million AUD | 83.9 | 128.1 | 211.5 | 272.3 | 258.6 | -5% | 32% | 100% |
| Unit Value AU\$ / Kg | 2.80 | 2.87 | 2.74 | 2.81 | 2.62 | -7% | -2% | 1.00 |
| Hong Kong | 24 | | | | 654 | | 128% | 0.7% |
| Value Million AUD | 0.1 | | | | 2.3 | | 125% | 0.9% |
| Unit Value AU\$ / Kg | 3.79 | | | | 3.57 | | -1% | 1.36 |
| Japan | | 18 | 209 | 36 | 206 | 472% | | 0.2% |
| Value Million AUD | | 0.1 | 0.6 | 0.1 | 0.6 | 641% | | 0.2% |
| Unit Value AU\$ / Kg | | 3.33 | 3.03 | 2.11 | 2.73 | 29% | | 1.04 |
| China | | | 168 | 56 | 88 | 57% | | 0.1% |
| Value Million AUD | | | 0.52 | 0.13 | 0.12 | -9% | | 0.0% |
| Unit Value AU\$ / Kg | | | 3.11 | 2.30 | 1.33 | -42% | | 0.51 |
| Korea, South | | | | 2 | 74 | 3600% | | 0.1% |
| Value Million AUD | | | | 0.01 | 0.30 | 3200% | | 0.1% |
| Unit Value AU\$ / Kg | | | | 4.50 | 4.01 | -11% | | 1.53 |
| Singapore | | | | | 54 | | | 0.1% |
| Value Million AUD | | | | | 0.19 | | | 0.1% |
| Unit Value AU\$ / Kg | | | | | 3.56 | | | 1.36 |
| EUROPE | 28,876 | 40,956 | 69,108 | 89,657 | 76,136 | -15% | 27% | 77.2% |
| Value Million AUD | 80.73 | 116.47 | 191.37 | 253.76 | 186.40 | -27% | 23% | 72.1% |
| Unit Value AU\$ / Kg | 2.80 | 2.84 | 2.77 | 2.83 | 2.45 | -14% | -3% | 0.93 |
| US & Canada | 459 | 1,719 | 4,047 | 2,607 | 18,436 | 607% | 152% | 18.7% |
| Value Million AUD | 1.13 | 6.03 | 9.51 | 5.96 | 60.47 | 914% | 171% | 23.4% |
| Unit Value AU\$ / Kg | 2.46 | 3.50 | 2.35 | 2.29 | 3.28 | 43% | 7% | 1.25 |
| All other | 649 | 1,877 | 3,543 | 4,546 | 2,947 | -35% | | 3.0% |
| Value Million AUD | 1.96 | 5.52 | 9.42 | 12.39 | 8.25 | -33% | | 3.2% |
| Unit Value AU\$ / Kg | 3.02 | 2.94 | 2.66 | 2.73 | 2.80 | 3% | | 1.07 |
| Trade to Asia | | | | | | | | |
| Asia | 24 | 18 | 377 | 94 | 1,076 | 1045% | 159% | 1.1% |
| Value Million AUD | 0.09 | 0.06 | 1.16 | 0.21 | 3.51 | 1538% | 149% | 1.4% |
| Unit Value AU\$ / Kg | 3.79 | 3.39 | 3.07 | 2.28 | 3.26 | 43% | -4% | 1.24 |
| Rest of World | 29,984 | 44,552 | 76,698 | 96,810 | 97,519 | 1% | 34% | 98.9% |
| Value Million AUD | 83.8 | 128.0 | 210.3 | 272.1 | 255.1 | -6% | 32% | 98.6% |
| Unit Value AU\$ / Kg | 2.80 | 2.87 | 2.74 | 2.81 | 2.62 | -7% | -2% | 1.00 |

Source: ITC TradeMap; Fresh Intelligence analysis

In 2022 Colombia exported 1.1 per cent of its avocado exports to Asia, yet this was over 1000 tonnes and a 10-fold over the previous year and Colombia is likely to be a formidable competitor.

Hass Colombia is an avocado packing and marketing plant formed by the Association of Producers of Avocado “Hass Colombia SAT”. As an agricultural society of avocado producers of diverse parts of the country it is dedicated to the packing and commercialization of the Hass avocado. Hass Colombia assist stakeholders to satisfy the market with the high international standards of quality and safety, oriented towards the growth of employees, associates and producers with social responsibility. Hass Colombia presents a direct export channel, where it delivers its product to the most demanding markets in the world, allowing fair returns to farmers.





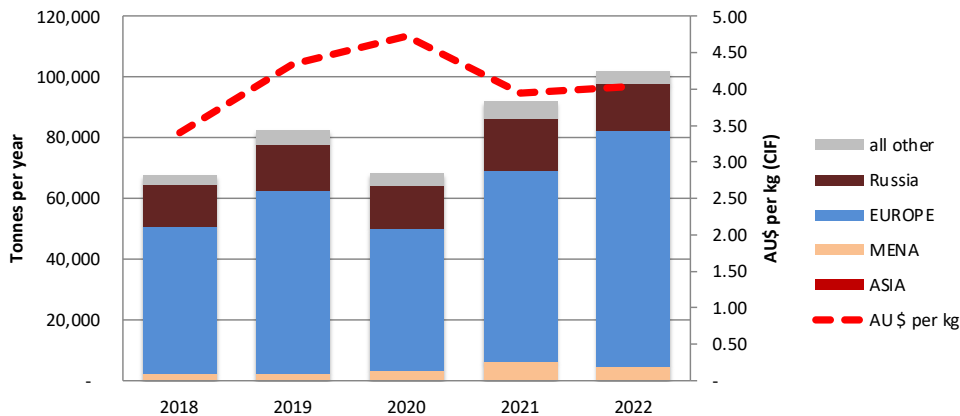
Israel

Israel is the largest producer of avocados in the Middle East region. In 2021 Israel produced 165,000 tonnes of avocados according to FAOSTAT with a five-year growth trend of 10.7 per cent per year. Israel is a significant producer of greenskin varieties including Ettinger, Pinkerton and Reed.

According to importer data (MIRROR DATA) in 2022 Israel supplied 102,008 tonnes of avocados to export markets with an average importer CIF unit value of AU\$4.04 per kg (CIF recorded by customer data) (Table 10.1). Europe was the main destination region accounting for 76 per cent of all exports by volume followed by Russia 15 per cent. Israel remains the largest supplier of avocados to Russia. The trade to Asian markets included 24 tonnes to Hong Kong and the first shipment of 21 tonnes to Japan after gaining access in October 2020.

Israel exports avocados from October to April (Figure 11.2) and competes in Europe with the Spanish season and with Chile.

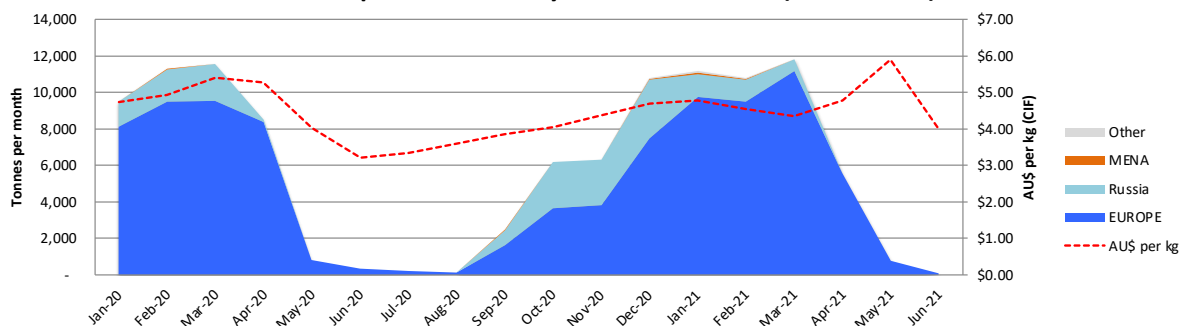
Israel Avocado Exports



Source :ITC Trademap; Fresh Intelligence analysis Mirror Data

Figure 11.1 Israel avocado exports by yearly volume 2018 – 2022 and FOB unit value (AU\$ equivalent)

Israel Avocado Exports Seasonality - Jan 20 to Jun 21 (Mirror Data)



Source: ITC Trademap; Fresh Intelligence analysis

Figure 10.2 Israel avocado exports seasonality – MIRROR DATA

(monthly data for 2022 is not reliable and incomplete, however the earlier data is indicative of the seasonal export pattern for Israel)

Table 11.1 Israel avocado exports by volume, CIF value and unit value by market 2018 – 2022
MIRROR DATA (customer's import data)

| | 2018 | 2019 | 2020 | 2021 | 2022 | 1 yr chg | 5 yr trend | 2022 share |
|-------------------------------|--------|--------|--------|--------|---------|----------|------------|------------|
| TOTAL SELECTED MARKETS | | | | | | | | |
| Volume Tonnes | 67,661 | 82,467 | 68,193 | 91,883 | 102,008 | 11% | 11% | 100% |
| Value Million AUD | 230.4 | 358.1 | 322.9 | 363.2 | 412.5 | 14% | 16% | 100% |
| Unit Value AU\$ / Kg | 3.41 | 4.34 | 4.73 | 3.95 | 4.04 | 2% | 4% | 1.00 |
| France | 16,283 | 21,682 | 16,916 | 20,096 | 23,998 | 19% | 10% | 23.5% |
| Value Million AUD | 46.4 | 95.2 | 78.5 | 71.9 | 98.4 | 37% | 21% | 23.9% |
| Unit Value AU\$ / Kg | 2.85 | 4.39 | 4.64 | 3.58 | 4.10 | 15% | 10% | 1.01 |
| United Kingdom | 9,816 | 10,411 | 10,505 | 13,445 | 16,851 | 25% | 14% | 16.5% |
| Value Million AUD | 43.0 | 45.8 | 51.3 | 60.6 | 63.4 | 5% | 10% | 15.4% |
| Unit Value AU\$ / Kg | 4.38 | 4.40 | 4.88 | 4.51 | 3.76 | -17% | -4% | 0.93 |
| Netherlands | 11,338 | 11,729 | 7,844 | 11,806 | 14,985 | 27% | 7% | 14.7% |
| Value Million AUD | 35.04 | 50.93 | 37.65 | 41.89 | 59.49 | 42% | 14% | 14.4% |
| Unit Value AU\$ / Kg | 3.09 | 4.34 | 4.80 | 3.55 | 3.97 | 12% | 6% | 0.98 |
| Germany | 4,403 | 7,561 | 5,778 | 8,123 | 8,564 | 5% | 18% | 8.4% |
| Value Million AUD | 22.74 | 36.72 | 27.77 | 41.05 | 39.37 | -4% | 15% | 9.5% |
| Unit Value AU\$ / Kg | 5.16 | 4.86 | 4.81 | 5.05 | 4.60 | -9% | -3% | 1.14 |
| Poland | 2,617 | 3,881 | 2,660 | 3,740 | 4,226 | 13% | 13% | 4.1% |
| Value Million AUD | 8.36 | 15.06 | 11.77 | 15.56 | 15.38 | -1% | 16% | 3.7% |
| Unit Value AU\$ / Kg | 3.20 | 3.88 | 4.43 | 4.16 | 3.64 | -13% | 3% | 0.90 |
| Slovenia | 940 | 867 | 415 | 1,483 | 3,416 | 130% | 38% | 3.3% |
| Value Million AUD | 2.51 | 4.21 | 1.95 | 5.04 | 14.01 | 178% | 54% | 3.4% |
| Unit Value AU\$ / Kg | 2.67 | 4.86 | 4.69 | 3.40 | 4.10 | 21% | 11% | 1.01 |
| Italy | 1,185 | 779 | 669 | 1,969 | 2,153 | 9% | 16% | 2.1% |
| Value Million AUD | 3.23 | 3.08 | 2.82 | 6.99 | 8.77 | 25% | 28% | 2.1% |
| Unit Value AU\$ / Kg | 2.72 | 3.95 | 4.21 | 3.55 | 4.07 | 15% | 11% | 1.01 |
| MENA | 2,256 | 2,000 | 3,062 | 6,202 | 4,585 | -26% | 19% | 4.5% |
| Value Million AUD | 10.13 | 9.21 | 13.76 | 24.41 | 18.87 | -23% | 17% | 4.6% |
| Unit Value AU\$ / Kg | 4.49 | 4.60 | 4.50 | 3.94 | 4.12 | 5% | -2% | 1.02 |
| All other | 41,562 | 50,374 | 40,772 | 58,342 | 61,159 | 5% | 10% | 60.0% |
| Value Million AUD | 62.97 | 94.46 | 98.67 | 103.99 | 99.12 | -5% | 12% | 24.0% |
| Unit Value AU\$ / Kg | 1.52 | 1.88 | 2.42 | 1.78 | 1.62 | -9% | 2% | 0.40 |
| Seasonality by Asia | | | | | | | | |
| Asia | 79 | 59 | 8 | 8 | 45 | 463% | -13% | 0.0% |
| Value Million AUD | 0.49 | 0.36 | 0.07 | 0.06 | 0.21 | 249% | -20% | 0.0% |
| Unit Value AU\$ / Kg | 6.25 | 6.12 | 8.13 | 7.38 | 4.58 | -38% | -8% | 1.13 |
| Rest of World | 67,582 | 82,408 | 68,185 | 91,875 | 101,963 | 11% | 11% | 100.0% |
| Value Million AUD | 230.0 | 357.8 | 322.8 | 363.1 | 412.3 | 14% | 16% | 100.0% |
| Unit Value AU\$ / Kg | 3.40 | 4.34 | 4.73 | 3.95 | 4.04 | 2% | 4% | 1.00 |

Source: ITC Trademap MIRROR DATA; Fresh Intelligence analysis

*MIRROR DATA – is the importer data used to measure exports from a country when official export data from that country is not complete or inaccurate. Unit values are therefore measured as CIF (Cost, Insurance, Freight) for the importing country.

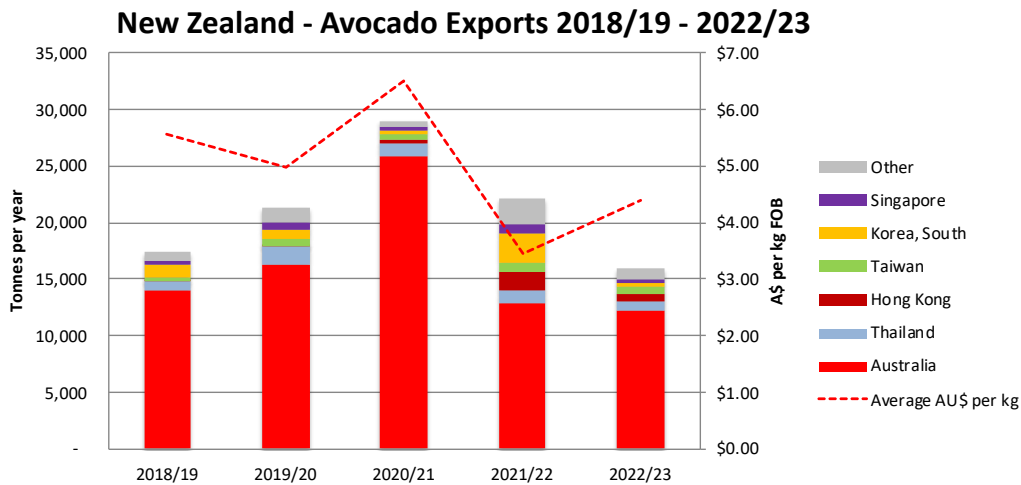


New Zealand

New Zealand is not a large producer of avocados although is included in this paper as it is the main supplier of Australia’s imported avocados. In 2021 New Zealand produced 38,321 tonnes of avocados according to FAOSTAT.

In 2022/23 New Zealand exported 15,904 tonnes of avocados with an average export FOB unit value of AU\$4.40 per kg (Table 12.1), 28 per cent lower than the previous year. Australia was the main destination and accounted for 77 per cent of exports. The prices recorded were influenced by the marketing conditions of avocados in Australia. New Zealand is actively seeking to develop new markets in Asia including South Korea, China, and Taiwan though volumes are small.

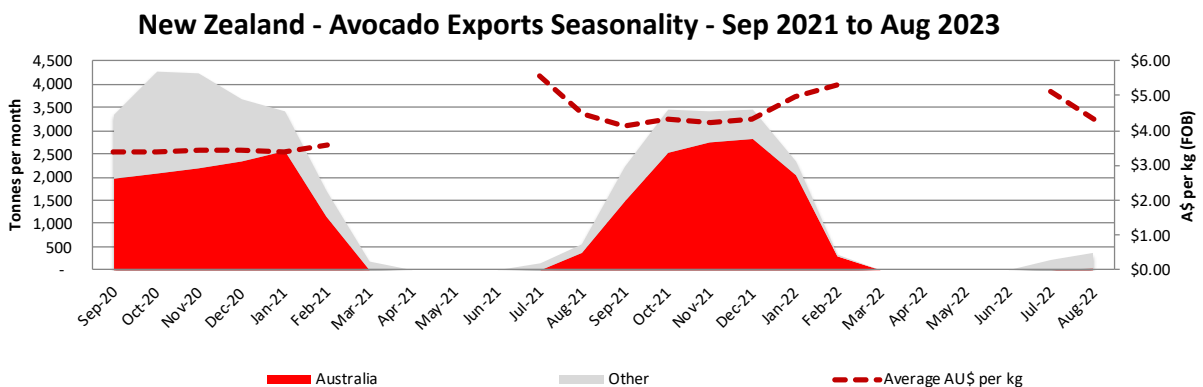
New Zealand exports avocados from September to February (Figure 12.2). New Zealand has significant biennial bearing and the 2021/22 season was an “on” season impacting the prices.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 12.1 New Zealand avocado exports by yearly volume 2018/19 – 2022/23 and FOB unit value (AU\$ equivalent)

New Zealand exports avocados from September to February (Figure 12.2). New Zealand has significant biennial bearing and the 2022/23 season was an “off” season impacting the prices and volume available to export, particularly to Asian markets.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 12.2 New Zealand avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 12.1 New Zealand avocado exports by volume, FOB value and unit value by market 2018/19 – 2022/23

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|-----------------|-------------------|----------------------|
| Volume Tonnes | 17,493 | 21,301 | 28,966 | 22,062 | 15,904 | -28% | -2% | 100% |
| Value Million AUD | 97.5 | 106.4 | 188.4 | 76.0 | 70.0 | -8% | -8% | 100% |
| Unit Value AU\$ / Kg | 5.57 | 5.00 | 6.50 | 3.44 | 4.40 | 28% | -6% | 1.00 |
| Australia | 14,050 | 16,319 | 25,820 | 12,882 | 12,255 | -5% | -3% | 77.1% |
| Value Million AUD | 76.9 | 79.5 | 172.4 | 42.3 | 54.1 | 28% | -8% | 77.2% |
| Unit Value AU\$ / Kg | 5.47 | 4.87 | 6.68 | 3.28 | 4.41 | 34% | -5% | 1.00 |
| Thailand | 816 | 1,554 | 1,266 | 1,206 | 771 | -36% | -1% | 4.8% |
| Value Million AUD | 5.5 | 9.3 | 7.0 | 4.7 | 3.8 | -20% | -9% | 5.4% |
| Unit Value AU\$ / Kg | 6.71 | 5.96 | 5.56 | 3.91 | 4.89 | 25% | -8% | 1.11 |
| Hong Kong | 16 | 57 | 248 | 1,537 | 737 | -52% | 162% | 4.6% |
| Value Million AUD | 0.09 | 0.23 | 1.37 | 4.92 | 2.80 | -43% | 139% | 4.0% |
| Unit Value AU\$ / Kg | 5.45 | 4.10 | 5.53 | 3.20 | 3.80 | 19% | -9% | 0.86 |
| Taiwan | 334 | 560 | 474 | 882 | 552 | -37% | 13% | 3.5% |
| Value Million AUD | 2.28 | 3.42 | 2.48 | 4.14 | 2.95 | -29% | 7% | 4.2% |
| Unit Value AU\$ / Kg | 6.83 | 6.11 | 5.24 | 4.69 | 5.34 | 14% | -6% | 1.21 |
| Korea, South | 1,088 | 968 | 257 | 2,584 | 410 | -84% | -22% | 2.6% |
| Value Million AUD | 6.81 | 5.33 | 1.14 | 9.46 | 1.64 | -83% | -30% | 2.3% |
| Unit Value AU\$ / Kg | 6.26 | 5.50 | 4.43 | 3.66 | 4.01 | 10% | -11% | 0.91 |
| Singapore | 356 | 570 | 449 | 717 | 313 | -56% | -3% | 2.0% |
| Value Million AUD | 1.80 | 2.53 | 1.91 | 2.48 | 1.24 | -50% | -9% | 1.8% |
| Unit Value AU\$ / Kg | 5.07 | 4.43 | 4.26 | 3.46 | 3.96 | 14% | -6% | 0.90 |
| India | 87 | 173 | 119 | 423 | 286 | -32% | 35% | 1.8% |
| Value Million AUD | 0.58 | 0.97 | 0.59 | 1.62 | 1.18 | -27% | 20% | 1.7% |
| Unit Value AU\$ / Kg | 6.65 | 5.59 | 4.93 | 3.84 | 4.12 | 7% | -11% | 0.94 |
| All other | 747 | 1,101 | 334 | 1,830 | 579 | -68% | -6% | 3.6% |
| Value Million AUD | 3.55 | 5.17 | 1.46 | 6.36 | 2.35 | -63% | -10% | 3.4% |
| Unit Value AU\$ / Kg | 4.75 | 4.69 | 4.37 | 3.47 | 4.06 | 17% | -4% | 0.92 |
| Seasonality by Hemisphere | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
| Asia | 3,320 | 4,739 | 2,979 | 8,619 | 3,276 | -62% | 0% | 20.6% |
| Value Million AUD | 19.76 | 25.62 | 15.16 | 31.64 | 14.27 | -55% | -8% | 20.4% |
| Unit Value AU\$ / Kg | 5.95 | 5.41 | 5.09 | 3.67 | 4.36 | 19% | -8% | 0.99 |
| Rest of World | 14,173 | 16,562 | 25,986 | 13,443 | 12,628 | -6% | -3% | 79.4% |
| Value Million AUD | 77.7 | 80.8 | 173.2 | 44.3 | 55.7 | 26% | -8% | 79.6% |
| Unit Value AU\$ / Kg | 5.48 | 4.88 | 6.66 | 3.30 | 4.41 | 34% | -5% | 1.00 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

In 2022/23 New Zealand exported 20.6 per cent of their avocados to Asian markets. The “Rest of World” is mostly Australia.

New Zealand Avocado is an association that works to promote the industry in the New Zealand and export markets in partnership with industry and government stakeholders, including pack houses, fruit marketing companies and exporters.



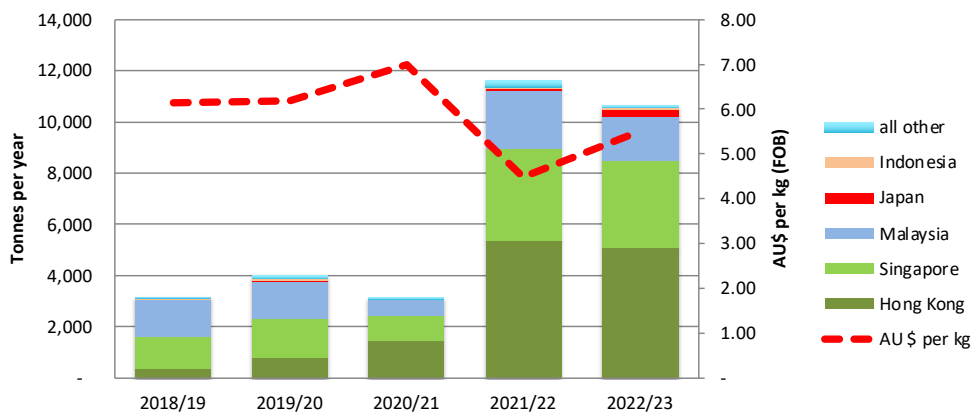


Australia

Australia is the largest producer of avocados in the Asia Pacific region. In 2022 Australia produced 122,000 tonnes of avocados with production ramping up significantly and is forecast to reach 170,000 tonnes by 2026.

In 2022/23 Australia exported 10,672 tonnes of avocados, easing 8 per cent after a 270 per cent increase the previous year. The average export FOB unit value of AU\$5.51 per kg (Table 13.1). Hong Kong was the main destination followed by Singapore and Malaysia, which combined account for 96 per cent of all export volumes. Access to Japan was gained in 2018 and 277 tonnes were exported in 2022/23.

Australia Avocado Exports

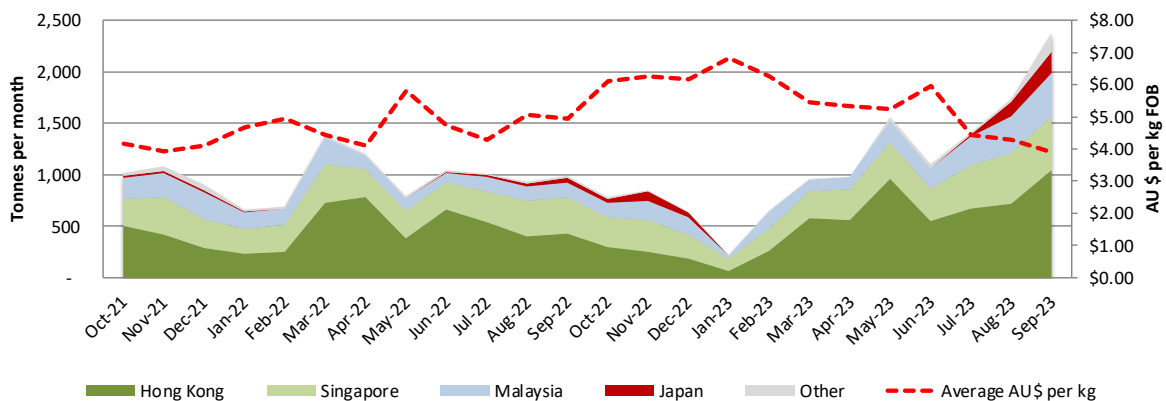


Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 13.1 Australian avocado exports by yearly volume 2018/19 – 2022/23 and FOB unit value (AU\$ equivalent)

Australia exports avocados year-round with the peak supply period from May to December (Figure 13.2). Australian exports are mostly from Queensland from March to October and from Western Australia from September to February. The higher production in 2022/23 has manifested in the higher export volumes from April through to the current period with lower price points. Trade from July to September 2023 is tracking 90 per cent higher than the same period in 2022.

Australia - Avocado Exports Seasonality - Oct 2021 to Sep 2023



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 13.2 Australian avocado exports seasonality and average FOB unit value (AU\$ equivalent)

Table 13.1 Australian avocado exports by volume, FOB value and unit value by market 2017/18 – 2021/22

| | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 1 yr chg | 5 yr trend | 2022/23 share |
|--------------------------|---------|---------|---------|---------|---------|----------|------------|---------------|
| Volume Tonnes | 3,195 | 4,051 | 3,155 | 11,611 | 10,672 | -8% | 35% | 100% |
| Value Million AUD | 19.6 | 25.0 | 22.0 | 52.0 | 58.7 | 13% | 31% | 100% |
| Unit Value AU\$ / Kg | 6.15 | 6.18 | 6.99 | 4.48 | 5.51 | 23% | -3% | 1.00 |
| Hong Kong | 360 | 804 | 1,425 | 5,358 | 5,074 | -5% | 94% | 47.5% |
| Value Million AUD | 2.4 | 5.7 | 10.1 | 24.7 | 28.9 | 17% | 87% | 49.2% |
| Unit Value AU\$ / Kg | 6.57 | 7.05 | 7.06 | 4.61 | 5.70 | 24% | -4% | 1.03 |
| Singapore | 1,278 | 1,526 | 996 | 3,580 | 3,397 | -5% | 28% | 31.8% |
| Value Million AUD | 7.3 | 8.9 | 6.3 | 15.5 | 17.7 | 15% | 25% | 30.2% |
| Unit Value AU\$ / Kg | 5.72 | 5.86 | 6.32 | 4.33 | 5.22 | 21% | -2% | 0.95 |
| Malaysia | 1,396 | 1,455 | 616 | 2,254 | 1,745 | -23% | 6% | 16.4% |
| Value Million AUD | 8.89 | 8.91 | 4.72 | 9.56 | 9.73 | 2% | 2% | 16.6% |
| Unit Value AU\$ / Kg | 6.36 | 6.12 | 7.67 | 4.24 | 5.57 | 31% | -3% | 1.01 |
| Japan | 3 | 40 | | 106 | 277 | 161% | 202% | 2.6% |
| Value Million AUD | 0.02 | 0.19 | | 0.69 | 1.38 | 101% | 184% | 2.4% |
| Unit Value AU\$ / Kg | 6.43 | 4.83 | | 6.51 | 5.00 | -23% | -6% | 0.91 |
| Indonesia | 85 | 75 | 58 | 65 | 48 | -25% | -13% | 0.5% |
| Value Million AUD | 0.66 | 0.55 | 0.53 | 0.43 | 0.38 | -13% | -13% | 0.6% |
| Unit Value AU\$ / Kg | 7.66 | 7.35 | 9.17 | 6.71 | 7.79 | 16% | 0% | 1.42 |
| Brunei Darussalam | 24 | 30 | 34 | 48 | 30 | -37% | 5% | 0.3% |
| Value Million AUD | 0.13 | 0.20 | 0.26 | 0.20 | 0.11 | -46% | -4% | 0.2% |
| Unit Value AU\$ / Kg | 5.15 | 6.67 | 7.55 | 4.09 | 3.51 | -14% | -9% | 0.64 |
| MIDDLE EAST | 64 | 190 | 37 | 249 | 128 | -49% | 19% | 1.2% |
| Value Million AUD | 0.40 | 0.83 | 0.21 | 1.22 | 0.64 | -47% | 12% | 1.1% |
| Unit Value AU\$ / Kg | 6.25 | 4.36 | 5.67 | 4.92 | 5.05 | 3% | -5% | 0.92 |
| All other | 43 | 117 | 25 | 102 | 79 | -23% | 16% | 0.7% |
| Value Million AUD | 0.27 | 0.53 | 0.16 | 0.56 | 0.38 | -31% | 9% | 0.7% |
| Unit Value AU\$ / Kg | 6.18 | 4.56 | 6.39 | 5.45 | 4.85 | -11% | -6% | 0.88 |
| Trade to Asia | | | | | | | | |
| Asia | 3,123 | 3,899 | 3,095 | 11,366 | 10,541 | -7% | 36% | 98.8% |
| Value Million AUD | 19.24 | 24.25 | 21.62 | 50.89 | 58.12 | 14% | 32% | 98.9% |
| Unit Value AU\$ / Kg | 6.16 | 6.22 | 6.99 | 4.48 | 5.51 | 23% | -3% | 1.00 |
| Rest of World | 72 | 152 | 60 | 245 | 131 | -46% | 16% | 1.2% |
| Value Million AUD | 0.4 | 0.8 | 0.4 | 1.1 | 0.6 | -43% | 11% | 1.1% |
| Unit Value AU\$ / Kg | 5.74 | 5.04 | 6.99 | 4.46 | 4.78 | 7% | -4% | 0.87 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Australia exported 99 per cent of its avocado exports to Asian markets and the remaining 1 per cent to the Middle East.

Association

Avocados Australia Limited (AAL) is the representative industry body for the Australian avocado industry and provides a range of services for its members and the broader industry to foster growth and development.



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