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GLOBAL MARKET TRADE ANALYSIS

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.

avocado.org.au 2023 Avocado Markets and Trade Report

Contents

Introduction – Global Avocado Trade	3
Australian Avocado Export Summary	5
Key Export Markets for Australian Avocados	6
Hong Kong	6
Singapore	8
Malaysia	10
Indonesia	12
Strategic Development Markets	14
Japan	14
Thailand	16
India	18
New Market Access Target Markets for Australian Avocados	20
China	20
Taiwan	22
South Korea	24
New Zealand	26
Opportunities in Middle East Markets	27
United Arab Emirates	27
Qatar	29
Other Leading Global Avocado Import Markets	31
Italy	31
United Kingdom	33
United States	35
References	37
Disclaimer	37

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
IHS	IHS Markit – Market Intelligence Services
ITC	International Trade Centre
MIRROR DATA	An aggregate measure of supplier country data when primary data is not available.
PPP	Purchase Power Parity
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	2019 share	
		2015	2016	2017	2018	2019	1 yr chg	5 yr trend	2019 share	
Total Tonnes imported	Volume Tonnes	1,075	2,076	2,327	3,156	3,914	24%	38%	100%	
Total CIF Value imported	Value Million AUD	4.5	9.2	10.9	14.9	18.5	24%	42%	100%	
Average CIF price	Unit Value AUS / Kg	4.21	4.41	4.68	4.74	4.73	0%	3%	1.00	Index : 2019 average CIF price all imports = 1.00 Example 4.73 = 1.00
Tonnes from supplier 1	Australia	626	1,045	825	1,335	1,901	42%	32%	48.6%	
CIF Value supplied by 1	Value Million AUD	3.09	5.37	5.88	8.61	11.21	30%	38%	60.5%	
CIF Unit Value of supplied	Unit Value AUS / Kg	4.94	5.14	7.13	6.45	5.90	-9%	5%	1.25	Supplier's Index price to average CIF price: Example 1.25 = 25% premium to average price
Tonnes from supplier 2	Kenya	80	226	607	595	589	-1%	65%	15.0%	
CIF Value supplied by 2	Value Million AUD	0.20	0.64	1.94	1.72	2.00	16%	77%	10.8%	
CIF Unit Value of supplied	Unit Value AUS / Kg	2.53	2.81	3.20	2.90	3.39	17%	8%	0.72	Supplier's Index price to average CIF price: Example 0.72 = 28% discount to average price

Introduction – Global Avocado Trade

Global production of avocados recorded by the Food & Agriculture Organisation (FAO) reached 8.06 million tonnes including 122,000 tonnes produced in Australia. Mexico is the world’s largest producer accounting for 28 per cent of the world’s production or 2.4 million tonnes followed by Colombia and Peru.

The global import trade in avocados reported by UN Comtrade in 2022/23 was 3.2 million tonnes worth AU\$11.4 billion equivalent, after increasing 9.1 per cent by volume. The volume has increased on average by 5.5 per cent per year over the past 5 years.

Australian export trade reached 10,672 tonnes mostly to Hong Kong, Singapore, and Malaysia.

Importers

The United States is the largest single country importer of avocados, importing over 1.29 million tonnes in 2022/23, mostly from Mexico. Europe is also a large importer by region with combined imports of 1.36 million tonnes although intra-European trade reduces the net imports to around 631,000 tonnes importing from South America and Israel.

Japan is the largest importer of avocados in Asia, recording 57,173 tonnes in 2022/23, which are mostly supplied from Mexico and Peru. China’s meteoric growth until 2018 has plateaued at around 41,000 tonnes. South Korean imports had increased steadily until 2020 though have eased 11 per cent in the last year after being driven by strong market development activity from Peru. (Table A)

Australia was the 15th largest avocado importer globally almost all from New Zealand and smaller volumes from Chile.

Table A Major import markets of avocados 2018 – 2022

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
United States	1,076,953	1,083,934	1,208,766	1,087,327	1,288,757	18.5%	4.6%	39.9%
Netherlands	344,451	386,145	430,985	463,506	485,177	4.7%	8.9%	15.0%
Spain	127,244	150,030	195,366	199,462	243,795	22.2%	17.7%	7.5%
France	169,722	159,688	175,670	194,800	191,290	-1.8%	3.0%	5.9%
Germany	102,925	107,155	122,200	126,557	133,945	5.8%	6.8%	4.1%
United Kingdom	115,544	116,329	116,178	114,405	118,916	3.9%	0.7%	3.7%
Canada	96,320	99,837	110,962	99,826	106,545	6.7%	2.6%	3.3%
Chile	22,229	21,807	60,341	52,864	75,280	42.4%	35.7%	2.3%
Japan	77,370	73,497	82,884	61,914	57,173	-7.7%	-7.3%	1.8%
Italy	24,593	25,486	34,366	45,901	48,115	4.8%	18.3%	1.5%
China	44,472	27,714	31,271	43,177	41,318	-4.3%	-1.8%	1.3%
Poland	23,074	22,120	27,256	31,397	36,585	16.5%	12.2%	1.1%
Hong Kong	23,073	16,125	19,657	30,595	22,285	-27.2%	-0.9%	0.7%
Australia	14,569	16,142	28,066	12,659	12,915	2.0%	-3.0%	0.4%
South Korea	9,240	7,903	16,482	15,486	13,741	-11.3%	10.4%	0.4%
Singapore	5,370	5,359	5,953	6,140	5,331	-13.2%	-0.2%	0.2%
Malaysia	3,577	3,448	4,077	4,385	4,072	-7.1%	3.3%	0.1%
India	290	331	770	1,464	2,916	99.2%	78.1%	0.1%
Thailand	834	1,834	1,859	1,971	1,453	-26.2%	14.9%	0.0%
Taiwan	1,043	1,201	1,266	1,306	1,047	-19.8%	0.1%	0.0%
Other	326,335	331,337	384,692	364,795	338,672	-7.2%	0.9%	10%
Global Imports	2,609,227	2,657,422	3,059,067	2,959,937	3,229,328	9.1%	5.5%	100%

Source: ITC Trademap; Fresh Intelligence analysis

Global Exports

Latin American producers including Mexico and Peru are the largest exporters.

Mexico is the world’s largest producer and exporter of avocados and sent over 1.1 million tonnes of avocados to the United States and Canada in 2022/23 plus almost 40,000 tonnes to Asian markets including Japan, Hong Kong, and China in 2022/23, increasing 18 per cent.

Peru is the second largest exporter exporting 664,000 tonnes mostly to Europe and United States, However the 9 per cent exported to Asia exceeds 70,000 tonnes and is making a significant impact in markets such as China, South Korea, and Thailand (Figure A).

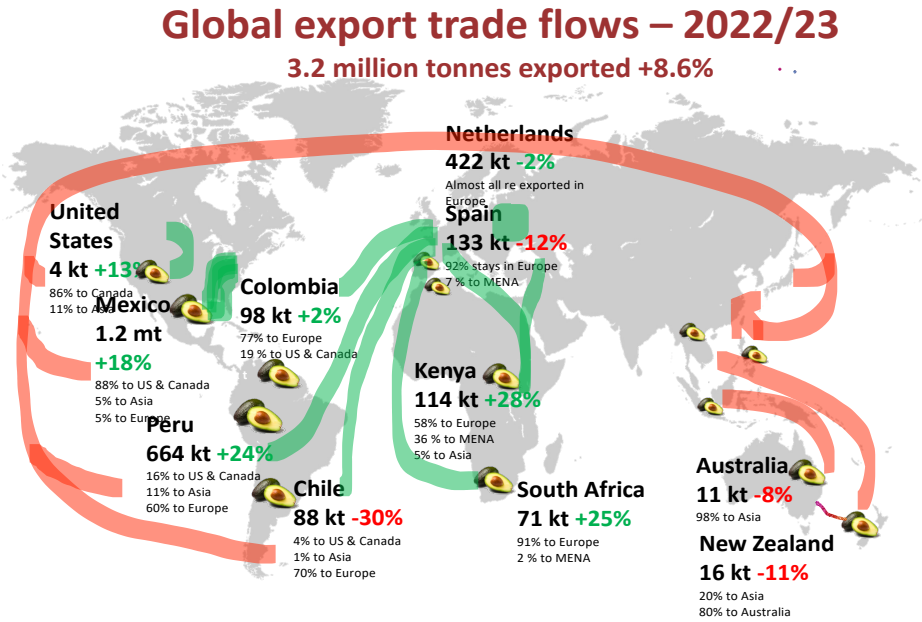


Figure A – Global Export trade flow for avocados – Fresh Intelligence analysis

Although the Netherlands is recorded as an exporter of some 422,000 tonnes, this volume is all re-exported to other European markets from avocados imported from Latin America as well as Spain and Israel.

The United States recorded 4,000 tonnes exported mostly to Asia though they exported a further 60,000 tonnes to Canada transported through from Mexico.

Colombia is a rapidly expanding exporter in South America with trade mostly to Europe and new access to United States.

In global terms Australia is a small exporter even though Australia increased 4-fold in 2 years to over 10,500 tonnes in 2022/23 with trade mostly to Hong Kong, Singapore and Malaysia.

New Zealand mostly exports to Australia though has increased focus on Asia following less demand from Australia where production is increasing rapidly.



Australian Avocado Export Summary

In 2022/23 exports of Australian avocados were **10,685** tonnes worth A\$58.82m and 8 per cent lower than in 2021/22 (Table 1). The overall value increased by 13 per cent. Unit values were 23 per cent higher at A\$5.51 per kg.

Table 1 : Avocado Key Measures

EXPORTS	YTD (from July)	Chg LY
Volume (tonnes)	10,685	-8%
Value (M AUD)	58.82	13%
\$ per kg (FOB)	\$5.51	23.0%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 5,074 tonnes, followed by Singapore and Malaysia. These markets accounted for 96 per cent of the 2022/23 exports.

There were 277 tonnes exported to Japan from Western Australia, and small consignments to Indonesia, UAE, and Qatar (Table 3).

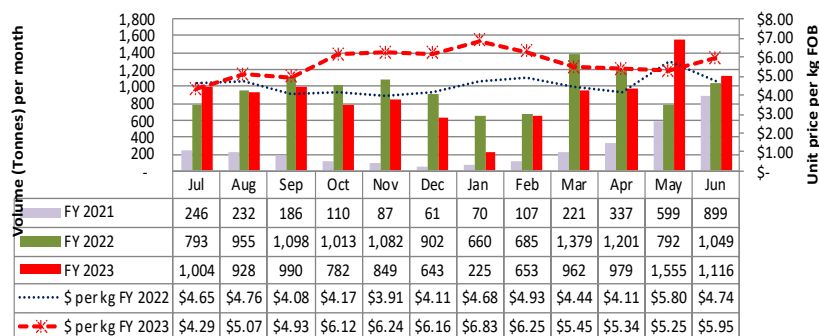
Table 2. Avocado By State

	July to June		Chg LY	share
	2021/22	2022/23		
	Tonnes	Tonnes	%	%
Queensland	5,537	7,217	30%	68%
New South Wales	2,195	1,527	-30%	14%
Western Australia	2,653	1,210	-54%	11%
Victoria	926	461	-50%	4%
South Australia	280	267	-5%	2%
Other	20	2		0%
Total	11,611	10,685	-8%	100%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

and the impact on volumes (Figure 1).

Figure 1 Avocado Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 3 : Avocado Exports by Market

Market	July to June		Chg LY	share
	2021/22	2022/23		
	Tonnes	Tonnes	%	%
Hong Kong	5,358	5,074	-5%	47.5%
Singapore	3,580	3,403	-5%	31.8%
Malaysia	2,254	1,752	-22%	16.4%
Japan	106	277	161%	2.6%
Indonesia	65	48	-25%	0.5%
Brunei Darussalam	48	30	-37%	0.3%
United Arab Emirates	98	22	-78%	0.2%
New Caledonia	28	22	-22%	0.2%
Fiji	10	18	75%	0.2%
Saudi Arabia	3	16	381%	0.2%
Qatar	9	10		0.1%
India	-	6		0.1%
all other	52	7		
Total YTD Tonnes	11,611	10,685	-8%	100%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume ++ >500% increase

Queensland was the largest export state for the period and was 30 per cent higher exporting 7,217 tonnes. Western Australia decreased 54 per cent to 1,210 tonnes for their season from September to March.

On a month to month basis the June exports the exports tracked lower by month until April before increasing while the prices were higher than the previous year highlighting the price sensitivities of the export markets

Sea freight accounted for 25 per cent of avocado shipments in 12 months to June 23 and was 49 per cent higher. In previous years sea freight accounted for under 3 per cent of total shipments.

	July to June		
	2022/23	change	share
	Tonnes	%	%
Air	8,002	-18%	75%
Sea	2,683	49%	25%
Total	10,685	-8%	100%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Key Export Markets for Australian Avocados



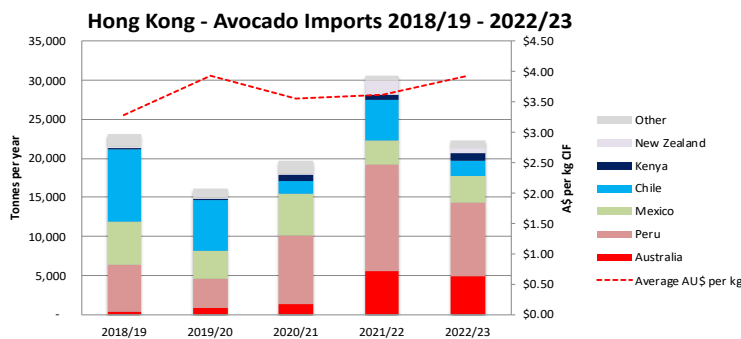
Hong Kong

Hong Kong imports are heavily influenced by re-exports to China. In 2022/23 Hong Kong recorded imports of 22,285 tonnes of avocados, which accounted for 518 per cent of their total consumption since Hong Kong re-exported some 80 per cent or 18,000 tonnes to China. The net imports after recorded re exports were 4,295 tonnes based. If all Australian avocados remained in Hong Kong this would suggest that Australia has close to 100 per cent share of the net Hong Kong avocado market.

Imports are sourced mostly from Peru (43 per cent) and Australia (22 per cent), however most Peruvian fruit is re-exported leaving Australia as the main supplier. The import growth trend has been marginally lower over 5 years influenced by a 27 per cent decline in 2022/23 (Table 1.1).

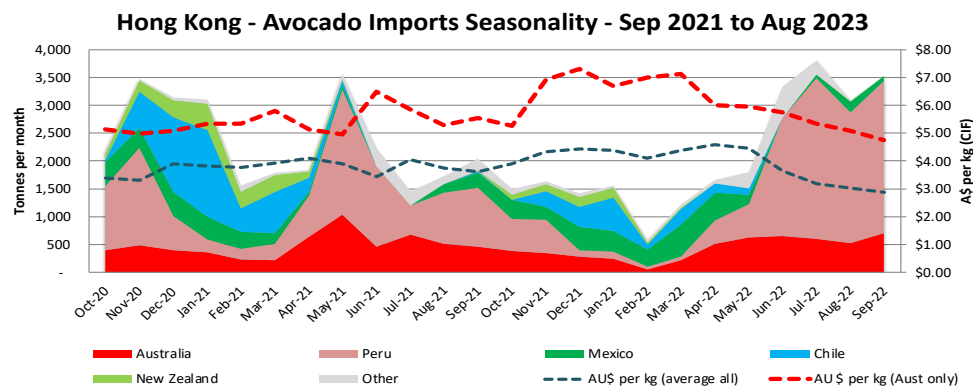
HONG KONG AT A GLANCE		
Population	7.3	million
Urban Share	100.0	per cent
Per capita GDP	73,940	(USD PPP)
Avocado Production	-	tonnes
Avocado Imports	22,285	tonnes
Reliance on Imports	518.8	per cent
Per capita consumption	0.58	kg p.p.
Southern Seasonality	77.1	per cent
Imports from Australia	4,919	tonnes
AU Market share	22.1	per cent
Main Competitors	Peru	Mexico
Tariff	Free	
Access	Open	
Avg Import AUD per kg	3.93	
Avg Import USD per kg	2.68	

Hong Kong re-exported around 17,999 tonnes mostly to China in 2022. It is apparent that most consignments destined for China are unloaded at the Hong Kong port are recorded as a Hong Kong import even if being immediately trans-shipped to Shenzhen market and beyond.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 1.1 Avocado imports by volume and unit price (AU\$ per kg FOB equivalent – based on MIRROR data)



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 1.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 1.1 Avocado imports by supplier volume, CIF value and unit value (net imports)

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	23,073	16,125	19,657	30,595	22,285	-27%	-1%	100%
Value Million AUD	75.9	63.4	70.0	110.8	87.5	-21%	4%	100%
Unit Value AU\$ / Kg	3.29	3.93	3.56	3.62	3.93	8%	5%	1.00
Australia	400	947	1,425	5,628	4,919	-13%	87%	22.1%
Value Million AUD	2.6	6.9	11.1	30.0	29.2	-3%	84%	33.3%
Unit Value AU\$ / Kg	6.42	7.25	7.79	5.34	5.93	11%	-2%	1.51
Peru	5,973	3,711	8,707	13,539	9,501	-30%	12%	42.6%
Value Million AUD	19.5	12.1	25.2	38.9	28.1	-28%	9%	32.1%
Unit Value AU\$ / Kg	3.27	3.26	2.89	2.87	2.95	3%	-3%	0.75
Mexico	5,481	3,519	5,404	3,137	3,410	9%	-11%	15.3%
Value Million AUD	19.88	15.28	16.20	10.74	12.51	16%	-11%	14.3%
Unit Value AU\$ / Kg	3.63	4.34	3.00	3.42	3.67	7%	0%	0.93
Chile	9,361	6,442	1,601	5,114	1,917	-63%	-33%	8.6%
Value Million AUD	26.39	21.16	6.40	19.11	8.31	-57%	-25%	9.5%
Unit Value AU\$ / Kg	2.82	3.28	4.00	3.74	4.33	16%	11%	1.10
Kenya	184	217	735	665	976	47%	52%	4.4%
Value Million AUD	0.52	0.73	1.95	1.57	2.30	47%	45%	2.6%
Unit Value AU\$ / Kg	2.82	3.38	2.65	2.35	2.36	0%	-4%	0.60
New Zealand	14	81	223	1,844	663	-64%	163%	3.0%
Value Million AUD	0.09	0.60	1.61	6.92	3.26	-53%	149%	3.7%
Unit Value AU\$ / Kg	6.18	7.46	7.19	3.75	4.92	31%	-6%	1.25
United States	759	935	970	263	343	31%	-18%	1.5%
Value Million AUD	3.42	5.41	5.04	1.54	2.12	38%	-11%	2.4%
Unit Value AU\$ / Kg	4.50	5.78	5.20	5.86	6.17	5%	8%	1.57
All other	901	273	591	405	556	37%	-11%	2.5%
Value Million AUD	3.51	1.30	2.51	1.99	1.80	-9%	-15%	2.1%
Unit Value AU\$ / Kg	3.90	4.75	4.24	4.91	3.24	-34%	-5%	0.82
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	16,157	11,298	12,174	26,266	17,180	-35%	2%	77.1%
Value Million AUD	49.94	41.20	45.23	95.65	69.30	-28%	9%	79.2%
Unit Value AU\$ / Kg	3.09	3.65	3.72	3.64	4.03	11%	7%	1.03
Northern Hemisphere	6,915	4,827	7,482	4,329	5,105	18%	-7%	22.9%
Value Million AUD	26.0	22.3	24.8	15.2	18.2	20%	-8%	20.8%
Unit Value AU\$ / Kg	3.75	4.61	3.31	3.50	3.57	2%	-1%	0.91

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong imported 77 per cent of its avocados from the Southern Hemisphere (Peru Australia and Chile) and 23 per cent from the Northern Hemisphere (Mexico and Kenya). Australia has exceeded Chile to become the No.2 southern supplier after Peru.

Approximately 70 per cent of these volumes were re-exported to China.

Hong Kong has a strong food service demand for avocados in addition to the growing retail trade.

Australia's 2026 Export Strategic Target for Hong Kong is 5,000 tonnes.



Singapore

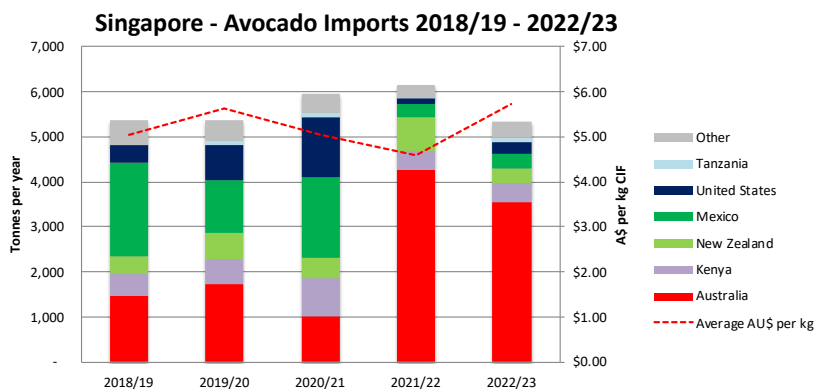
Singapore is a regular importer of avocados and in 2022/23 imported 5,331

tonnes of avocados, which was 13 per cent lower than the previous year though unchanged over 5 years indicating that 2021/22 was abnormally high.

Australia was the leading supplier in 2022/23 recovering strongly from the low level in 2020. Avocados were sourced mostly from Australia (67 per cent) and Kenya (8 per cent) and other suppliers, vastly changing the supply mix from 2 years ago.

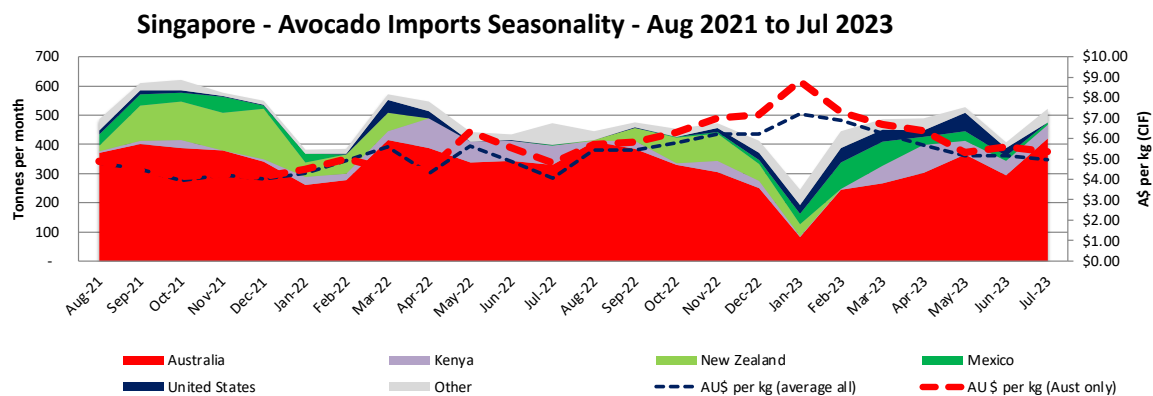
Australia has dominated the supply of avocados to Singapore in 2022/23 with competitive pricing however the market has shown that lifting prices will be met with alternative suppliers to maintain volume (Figure 2.1).

SINGAPORE AT A GLANCE		
Population	5.6	million
Urban Share	100.0	per cent
Per capita GDP	107,030	(USD PPP)
Avocado Production	-	tonnes
Avocado Imports	5,331	tonnes
Reliance on Imports	106.8	per cent
Per capita consumption	0.89	kg p.p.
Southern Seasonality	73.9	per cent
Imports from Australia	3,559	tonnes
AU Market share	66.8	per cent
Main Competitors	Kenya	New Zealand
Tariff	Free	
Access	Open	
Average Import AUD per kg	5.72	all sources
Average Import USD per kg	3.91	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis
 Figure 2.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Singapore imports between 400 – 550 tonnes per month year-round. When prices from Western Australia lifted from November to February the volumes dropped sharply (Figure 2.2). Fortunately, the prices were adjusted with the Queensland season before other suppliers gained too much advantage even though Mexico and United States saw an increase at the time.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis
 Figure 2.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 2.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	5,370	5,359	5,951	6,139	5,331	-13%	0%	100%
Value Million AUD	27.1	30.2	30.0	28.2	30.5	8%	3%	100%
Unit Value AU\$ / Kg	5.05	5.64	5.05	4.59	5.72	25%	3%	1.00
Australia	1,470	1,728	1,032	4,250	3,559	-16%	25%	66.8%
Value Million AUD	9.3	11.2	7.6	20.0	21.9	10%	24%	72.0%
Unit Value AU\$ / Kg	6.33	6.48	7.36	4.71	6.17	31%	-1%	1.08
Kenya	494	572	844	428	423	-1%	-4%	7.9%
Value Million AUD	1.6	2.1	2.3	1.6	1.1	-27%	-9%	3.7%
Unit Value AU\$ / Kg	3.29	3.68	2.68	3.63	2.68	-26%	-5%	0.47
New Zealand	383	577	456	751	324	-57%	-4%	6.1%
Value Million AUD	1.90	2.97	1.94	3.03	1.57	-48%	-5%	5.1%
Unit Value AU\$ / Kg	4.95	5.16	4.26	4.03	4.84	20%	-1%	0.85
Mexico	2,080	1,149	1,759	303	314	4%	-38%	5.9%
Value Million AUD	9.87	6.78	8.59	1.72	2.19	28%	-31%	7.2%
Unit Value AU\$ / Kg	4.74	5.90	4.88	5.67	6.98	23%	10%	1.22
United States	393	791	1,331	117	276	136%	-8%	5.2%
Value Million AUD	2.22	4.73	7.91	0.92	1.77	92%	-5%	5.8%
Unit Value AU\$ / Kg	5.64	5.97	5.95	7.89	6.42	-19%	3%	1.12
Tanzania	3	93	114	4	97	2325%	138%	1.8%
Value Million AUD	0.01	0.41	0.32	0.02	0.55	2453%	147%	1.8%
Unit Value AU\$ / Kg	4.94	4.36	2.77	5.42	5.71	5%	4%	1.00
Malaysia	2	17	9	50	73	46%	146%	1.4%
Value Million AUD	0.00	0.05	0.01	0.15	0.33	122%	254%	1.1%
Unit Value AU\$ / Kg	1.06	3.14	0.99	2.98	4.52	52%	44%	0.79
All other	545	432	406	236	265	12%	-16%	5.0%
Value Million AUD	2.21	1.99	1.41	0.75	0.99	31%	-18%	3.3%
Unit Value AU\$ / Kg	4.05	4.61	3.46	3.20	3.74	17%	-2%	0.65
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	2,212	2,654	1,579	5,008	3,937	-21%	16%	73.9%
Value Million AUD	12.54	15.66	9.82	23.08	23.68	3%	17%	77.7%
Unit Value AU\$ / Kg	5.67	5.90	6.22	4.61	6.02	31%	1%	1.05
Northern Hemisphere	3,158	2,705	4,372	1,131	1,394	23%	-18%	26.1%
Value Million AUD	14.6	14.6	20.2	5.1	6.8	34%	-17%	22.3%
Unit Value AU\$ / Kg	4.62	5.39	4.62	4.49	4.88	9%	1%	0.85

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Singapore imported 74 per cent of its avocados from the Southern Hemisphere (mostly Australia and New Zealand) and 26 per cent from the Northern Hemisphere (Kenya, Mexico, and United States).

Australia's 2026 Export Strategic Target for Singapore is 5,400 tonnes.

This involves market growth via promotion as well as holding at least 70 per cent market share.

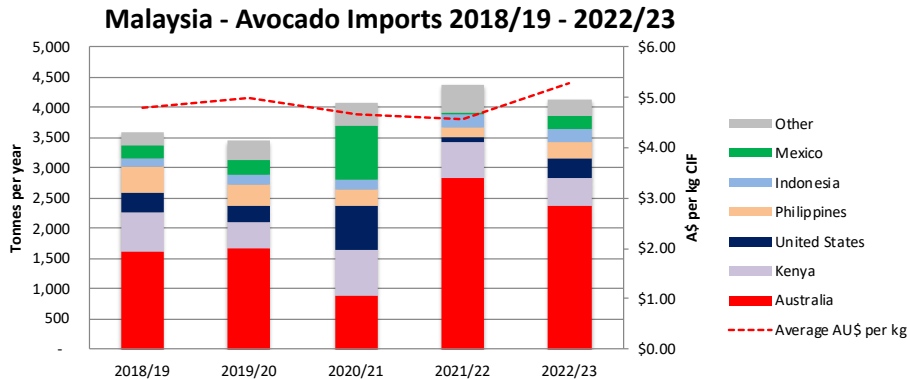


Malaysia

Malaysia is Australia's third largest export destination. In 2022/23 Malaysia imported 4,212 tonnes of avocados from all sources, which accounted for 100 per cent of the country's total consumption. Per capita consumption remains very small at 0.11 kg per person per year.

Imports are sourced mostly from Australia (58 per cent) and Kenya (11 per cent) and many other suppliers. The import growth trend has been 4 per cent per year over the last 5 years though decreased 6 per cent in 2022/23 influenced by Australia. Australian supply decreased 16 per cent after strong gains in the previous year. United States increased by over 200 per cent off a smaller base (Table 3.1).

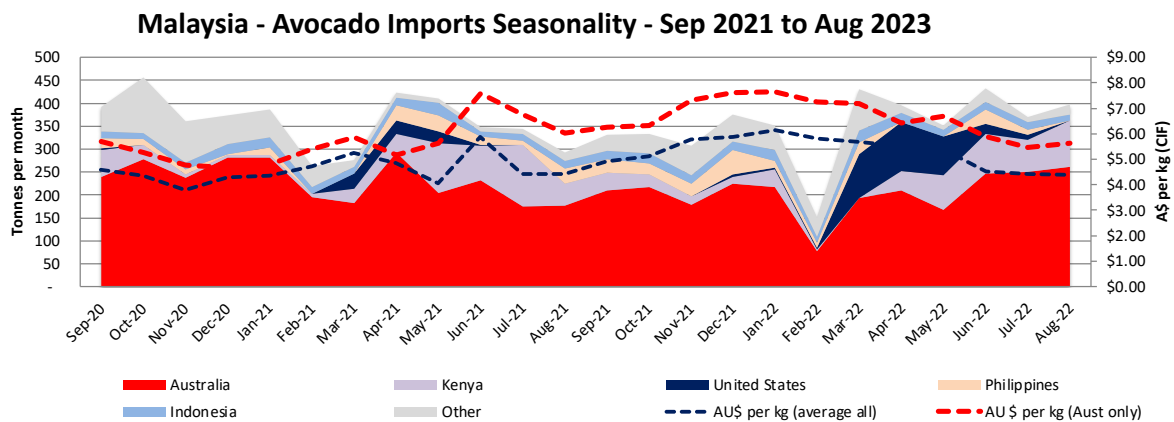
MALAYSIA AT A GLANCE		
Population	33.9	million
Urban Share	77.2	per cent
Per capita GDP	32,250	(USD PPP)
Avocado Production	-	tonnes
Avocado Imports	4,121	tonnes
Reliance on Imports	106.5	per cent
Per capita consumption	0.11	kg p.p.
Southern Seasonality	60.2	per cent
Imports from Australia	2,369	tonnes
AU Market share	57.5	per cent
Main Competitors	Kenya	United States
Tariff	Free	
Access	Open	
Average Import AUD per kg	5.28	all sources
Average Import USD per kg	3.61	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 3.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Australia remains the main supplier and has also maintained premium prices. The prices from Kenya, Philippines and Indonesia are considerably lower although the quality is no match for Australia.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 3.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 3.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	3,577	3,448	4,077	4,385	4,121	-6%	4%	100%
Value Million AUD	17.1	17.1	19.0	19.9	21.8	9%	6%	100%
Unit Value AU\$ / Kg	4.79	4.97	4.65	4.55	5.28	16%	2%	1.00
Australia	1,607	1,655	877	2,819	2,369	-16%	10%	57.5%
Value Million AUD	10.2	10.6	7.1	15.6	15.7	1%	11%	72.0%
Unit Value AU\$ / Kg	6.35	6.42	8.12	5.53	6.62	20%	1%	1.25
Kenya	657	442	753	594	462	-22%	-8%	11.2%
Value Million AUD	2.0	1.5	2.0	1.4	1.3	-3%	-10%	6.0%
Unit Value AU\$ / Kg	3.03	3.49	2.67	2.28	2.85	25%	-2%	0.54
United States	318	276	749	97	334	243%	1%	8.1%
Value Million AUD	2.01	1.48	3.45	0.61	1.77	188%	-3%	8.1%
Unit Value AU\$ / Kg	6.32	5.38	4.61	6.31	5.30	-16%	-4%	1.00
Philippines	428	358	253	170	264	55%	-11%	6.4%
Value Million AUD	1.24	1.05	0.68	0.47	0.76	62%	-11%	3.5%
Unit Value AU\$ / Kg	2.90	2.94	2.69	2.77	2.89	4%	0%	0.55
Indonesia	139	142	165	196	224	14%	13%	5.4%
Value Million AUD	0.14	0.13	0.15	0.20	0.24	19%	14%	1.1%
Unit Value AU\$ / Kg	1.00	0.95	0.94	1.01	1.05	4%	1%	0.20
Mexico	211	261	896	36	216	507%	1%	5.2%
Value Million AUD	0.59	0.92	3.75	0.09	1.07	1077%	16%	4.9%
Unit Value AU\$ / Kg	2.77	3.55	4.18	2.56	4.96	94%	16%	0.94
New Zealand	65	154	179	316	110	-65%	14%	2.7%
Value Million AUD	0.40	0.79	0.99	1.18	0.54	-54%	8%	2.5%
Unit Value AU\$ / Kg	6.15	5.11	5.54	3.74	4.92	31%	-5%	0.93
All other	153	160	204	156	142	-9%	-2%	3.5%
Value Million AUD	0.56	0.58	0.80	0.45	0.39	-14%	-9%	1.8%
Unit Value AU\$ / Kg	3.69	3.62	3.91	2.92	2.75	-6%	-7%	0.52
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	1,780	1,938	1,208	3,182	2,481	-22%	9%	60.2%
Value Million AUD	11.01	11.85	8.60	16.94	16.23	-4%	10%	74.6%
Unit Value AU\$ / Kg	6.18	6.11	7.13	5.32	6.54	23%	1%	1.24
Northern Hemisphere	1,797	1,510	2,869	1,203	1,641	36%	-2%	39.8%
Value Million AUD	6.1	5.3	10.3	3.0	5.5	84%	-2%	25.4%
Unit Value AU\$ / Kg	3.40	3.51	3.61	2.50	3.37	35%	0%	0.64

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Malaysia imported 40 per cent of its avocados from the Northern Hemisphere (mostly Kenya and United States) and 60 per cent from the Southern Hemisphere (Australia).

Australia's 2026 Export Strategic Target for Malaysia is 3,600 tonnes, which involved market growth and maintaining at least 60 per cent market share.



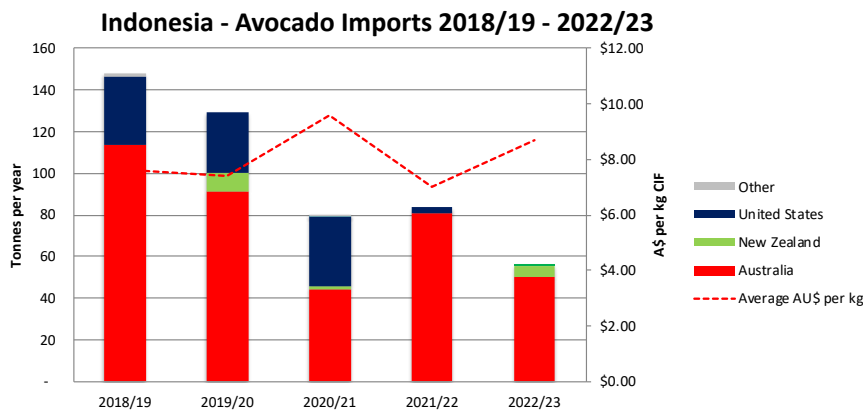
Indonesia

Indonesia is the largest producer of avocados in Asia, and therefore is only a very small importer. In 2022/23 Indonesia imported 55 tonnes of avocados. In contrast Indonesia produced 669,000 tonnes of avocados in 2021.

Imports were sourced mostly from Australia (91 per cent) and New Zealand (9 per cent). The imports have been around 80 tonnes since 2018 though peaks at 145 tonnes in 2019.

Indonesian avocados are mostly green skin varieties and split among butter types and milk types. The interest in imported avocados is likely to be driven by introduction of Hass that are not widely known in Indonesia. However, there is no indication of sustained growth at this stage.

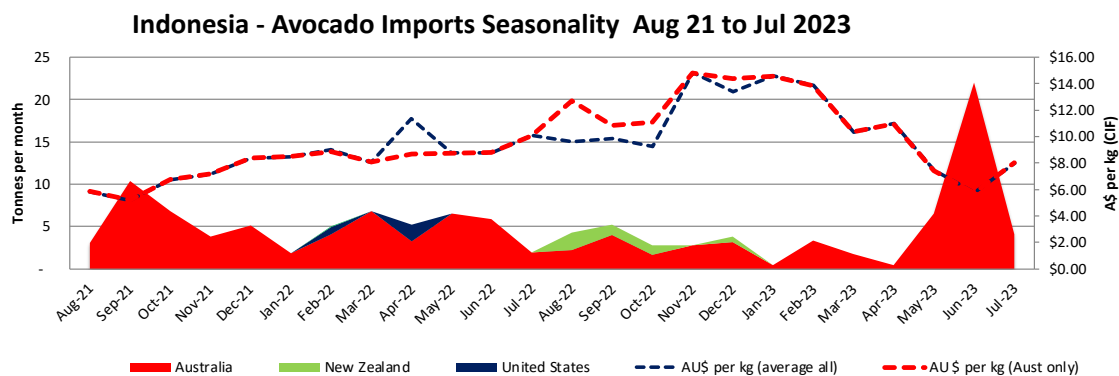
INDONESIA AT A GLANCE		
Population	275.5	million
Urban Share	56.6	per cent
Per capita GDP	14,250	USD PPP
Avocado Production	669,260	tonnes
Avocado Imports	55	tonnes
Reliance on Imports	0.0	per cent
Per capita consumption	2.43	kg p.p.
Southern Seasonality	-	per cent
Imports from Australia	50	tonnes
AU Market share	90.9	per cent
Main Competitors	New Zealand	United States
Tariff	0%	
Access	0%	
Avg Import AUD per kg	8.69	all sources
Avg Import USD per kg	5.94	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 4.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Australia remained the main supplier albeit at very low volumes and high price points. Almost half the annual volume was delivered in June when the prices was under A\$6.00 per kg, indicating opportunities to grow the volume at price points consistent with other markets.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 4.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 4.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	148	130	79	84	55	-34%	-22%	100%
Value Million AUD	1.1	1.0	0.8	0.6	0.5	-19%	-19%	100%
Unit Value AU\$ / Kg	7.65	7.40	9.61	7.02	8.69	24%	3%	1.00
Australia	114	91	44	81	50	-38%	-18%	90.9%
Value Million AUD	0.8	0.7	0.5	0.5	0.4	-19%	-14%	93.0%
Unit Value AU\$ / Kg	7.29	7.14	10.35	6.77	8.89	31%	5%	1.02
New Zealand	-	9	1	-	5			9.1%
Value Million AUD	-	0.1	0.0	-	0.0			7.0%
Unit Value AU\$ / Kg		6.63	8.70		6.66			0.77
United States	33	30	34	3		-100%	-100%	0.0%
Value Million AUD	0.29	0.25	0.29	0.04		-100%	-100%	0.0%
Unit Value AU\$ / Kg	8.91	8.41	8.56	13.86		-100%	-100%	-
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	114	100	46	81	55	-32%	-16%	100.0%
Value Million AUD	0.83	0.71	0.47	0.55	0.48	-13%	-13%	100.0%
Unit Value AU\$ / Kg	7.29	7.09	10.29	6.77	8.69	28%	4%	1.00
Northern Hemisphere	35	30	34	3	0	-100%	-91%	0.0%
Value Million AUD	0.3	0.2	0.3	0.0	0.0	-100%	-90%	0.0%
Unit Value AU\$ / Kg	8.87	8.41	8.68	13.86	14.00	1%	12%	1.61

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Indonesia imported 100 per cent of its avocados from the Southern Hemisphere (Australia, New Zealand) and no supply from the Northern Hemisphere in 2022/23

Australia's 2026 Export Strategic Target for Indonesia is 200 tonnes which could be easily achieved with the right mix of price and promotion of HASS in premium retail chains.



Examples of avocados grown in Indonesia

Strategic Development Markets



Japan

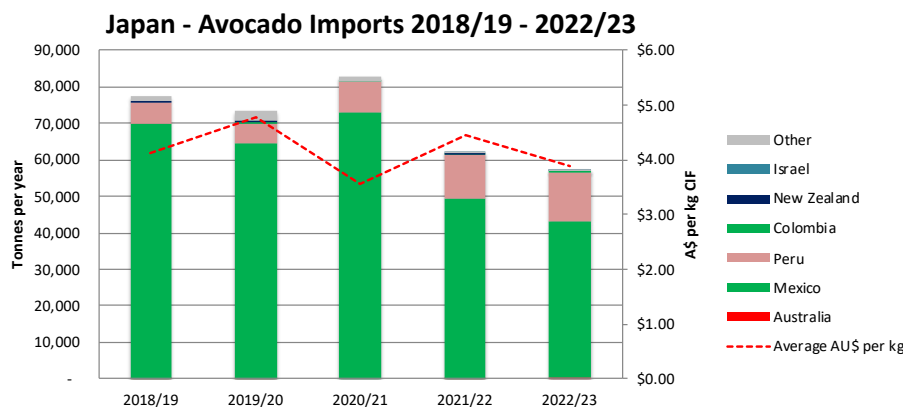
Japan is the largest importer of avocados in Asia. In 2022/23

Japan imported 57,173 tonnes of avocados, which accounted for 100 per cent of the country's total consumption. Japan has no recorded local production.

Imports are sourced mostly from Mexico (75 per cent) and Peru (24 per cent) plus small volumes from United States, New Zealand, Colombia and now Australia and Colombia which all have access. The imports declined a further 8 per cent in the 12 months to June 2023 (Figure 5.1) which means that the imports have declined 7 per cent per year over 5 years.

JAPAN AT A GLANCE		
Population	125.1	million
Urban Share	91.8	per cent
Per capita GDP	48,470	USD PPP
Avocado Production	-	tonnes
Avocado Imports	57,173	tonnes
Reliance on Imports	100.0	per cent
Per capita consumption	0.46	kg p.p.
Southern Seasonality	24.6	per cent
Imports from Australia	293	tonnes
AU Market share	0.5	per cent
Main Competitors	Mexico	Peru
Tariff	Nil	
Access	Protocol	
Avg Import AUD per kg	3.88	all sources
Avg Import USD per kg	2.65	

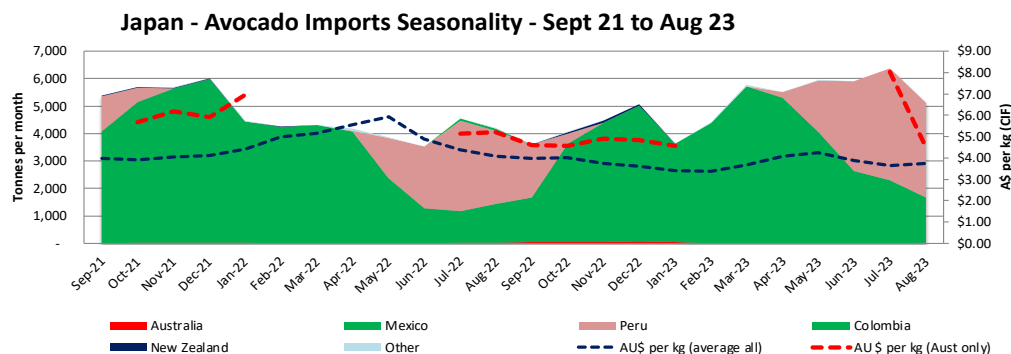
Australia shipped 293 tonnes in 2022/23 from Western Australia.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 5.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Although Mexico dominates the supply for most of the year Peru is eroding Mexico's market share particularly from May to September (Figure 5.2). Australia supplied 293 tonnes in the 2022/23 season. Average CIF prices across all suppliers decreased to AU\$3.88 for the year and AU\$4.77 from Australia.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 5.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 5.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	77,370	73,497	82,884	61,914	57,173	-8%	-7%	100%
Value Million AUD	318.1	351.1	295.7	275.1	222.0	-19%	-9%	100%
Unit Value AU\$ / Kg	4.11	4.78	3.57	4.44	3.88	-13%	-1%	1.00
Australia	3	40		89	293	227%	207%	0.5%
Value Million AUD	0.0	0.3		0.5	1.4	155%	179%	0.6%
Unit Value AU\$ / Kg	6.94	6.75		6.11	4.77	-22%	-9%	1.23
Mexico	69,701	64,549	73,020	49,333	42,773	-13%	-11%	74.8%
Value Million AUD	283.2	306.5	255.4	225.1	166.5	-26%	-12%	75.0%
Unit Value AU\$ / Kg	4.06	4.75	3.50	4.56	3.89	-15%	-1%	1.00
Peru	5,920	5,462	8,276	12,151	13,619	12%	23%	23.8%
Value Million AUD	24.81	24.29	32.14	47.83	52.22	9%	20%	23.5%
Unit Value AU\$ / Kg	4.19	4.45	3.88	3.94	3.83	-3%	-2%	0.99
Colombia		44	187	36	204	463%		0.4%
Value Million AUD		0.18	0.68	0.13	0.65	410%		0.3%
Unit Value AU\$ / Kg		4.01	3.66	3.54	3.20	-9%		0.83
New Zealand	512	528		163	160	-2%	-25%	0.3%
Value Million AUD	2.44	2.80		0.67	0.69	2%	-27%	0.3%
Unit Value AU\$ / Kg	4.77	5.30		4.11	4.28	4%	-3%	1.10
Israel				21	64	202%		0.1%
Value Million AUD				0.08	0.12	52%		0.1%
Unit Value AU\$ / Kg				3.84	1.93	-50%		0.50
United States	1,099	2,300	1,399	120	40	-67%	-56%	0.1%
Value Million AUD	7.01	14.16	7.53	0.76	0.27	-65%	-56%	0.1%
Unit Value AU\$ / Kg	6.38	6.15	5.38	6.37	6.84	8%	2%	1.76
All other	135	573	2		22			0.0%
Value Million AUD	0.58	2.89	0.01		0.12			0.1%
Unit Value AU\$ / Kg	4.29	5.05	7.53		5.70			1.47
Seasonality by Hemisphere								
Southern Hemisphere	6,553	6,604	8,276	12,404	14,093	14%	21%	24.6%
Value Million AUD	27.77	30.25	32.14	49.05	54.42	11%	18%	24.5%
Unit Value AU\$ / Kg	4.24	4.58	3.88	3.95	3.86	-2%	-2%	0.99
Northern Hemisphere	70,816	66,893	74,608	49,511	43,080	-13%	-12%	75.4%
Value Million AUD	290.3	320.8	263.6	226.1	167.6	-26%	-13%	75.5%
Unit Value AU\$ / Kg	4.10	4.80	3.53	4.57	3.89	-15%	-1%	1.00

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan imported 75 per cent of its avocados from the Northern Hemisphere (mostly Mexico) and 25 per cent from the Southern Hemisphere (mostly Peru, also Australia). Peru is offsetting a decline in trade from Mexico.

Australia’s 2026 Export Strategic Target for Japan is 800 tonnes which should be achievable with maintaining a steady reliable supply and price points with targeted promotion.



Thailand

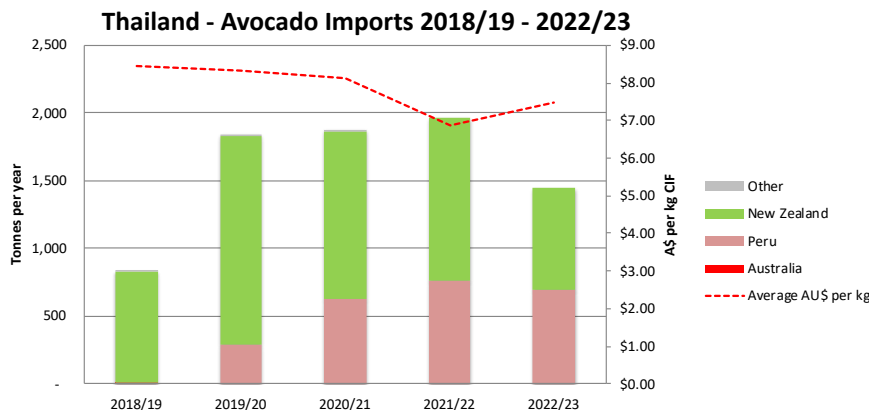
Thailand is a small importer of avocados that Australia pioneered with supplies soon after the Thailand - Australia Free Trade Agreement (TAFTA) was implemented. In 2022/23 Thailand imported 1,453 tonnes of avocados from Peru and New Zealand.

Imports have been sourced from New Zealand since a change in the import protocol in 2013 that required cold treatment effectively halted Australian exports and allowed New Zealand to fill the demand. The import growth trend has been 15 per cent per year over the last 5 years, strongly influenced by the access from Peru in 2019.

Consumption is very low though has potential to expand following trends in other Asian markets. New Zealand can enter with fruit fly free status. Peru enters with a conditional non-host status.

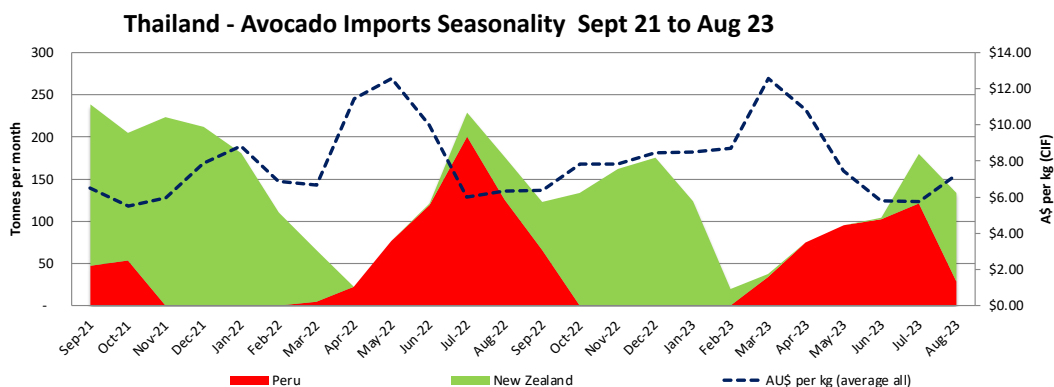
In September 2023 access was regained for Australia for 'Hass' avocado fruit in hard mature green condition harvested in Western Australia only.

THAILAND AT A GLANCE		
Population	71.7	million
Urban Share	51.4	per cent
Per capita GDP	20,070	USD PPP
Avocado Production	-	tonnes
Avocado Imports	1,453	tonnes
Reliance on Imports	111.4	per cent
Per capita consumption	0.02	kg p.p.
Southern Seasonality	100.0	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	Peru	New Zealand
Tariff	Nil	
Access	Protocol	
Avg Import AUD per kg	7.49	all sources
Avg Import USD per kg	5.12	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 6.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 6.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 6.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	834	1,834	1,859	1,971	1,453	-26%	15%	100%
Value Million AUD	7.1	15.2	15.1	13.6	10.9	-20%	11%	100%
Unit Value AU\$ / Kg	8.46	8.32	8.11	6.89	7.49	9%	-3%	1.00
Australia								0.0%
Value Million AUD								0.0%
Unit Value AU\$ / Kg	No Trade - access regained from September 2023							-
Peru	12	287	625	762	699	-8%	174%	48.1%
Value Million AUD	0.1	2.8	4.2	5.0	4.6	-7%	147%	42.4%
Unit Value AU\$ / Kg	10.00	9.65	6.65	6.52	6.59	1%	-10%	0.88
New Zealand	820	1,547	1,235	1,209	754	-38%	-2%	51.9%
Value Million AUD	6.92	12.48	10.92	8.61	6.27	-27%	-2%	57.6%
Unit Value AU\$ / Kg	8.44	8.07	8.84	7.13	8.32	17%	0%	1.11
Seasonality by Hemisphere								
Southern Hemisphere	834	1,834	1,859	1,971	1,453	-26%	15%	100.0%
Value Million AUD	7.06	15.25	15.07	13.58	10.88	-20%	11%	100.0%
Unit Value AU\$ / Kg	8.46	8.31	8.11	6.89	7.49	9%	-3%	1.00
Northern Hemisphere								0.0%
Value Million AUD								0.0%
Unit Value AU\$ / Kg								-

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Thailand has imported all its avocados from the Southern Hemisphere over the past 5 years.

Australia's 2026 Export Strategic Target for Thailand is 750 tonnes providing access is achieved with a workable protocol. Access was achieved from Western Australia in 2023 with trade recommencing in September 2023.



New Zealand Avocados in Tops Bangkok (November 2022)
99 BHT per pack ~ AU\$4.05 per pack of 3



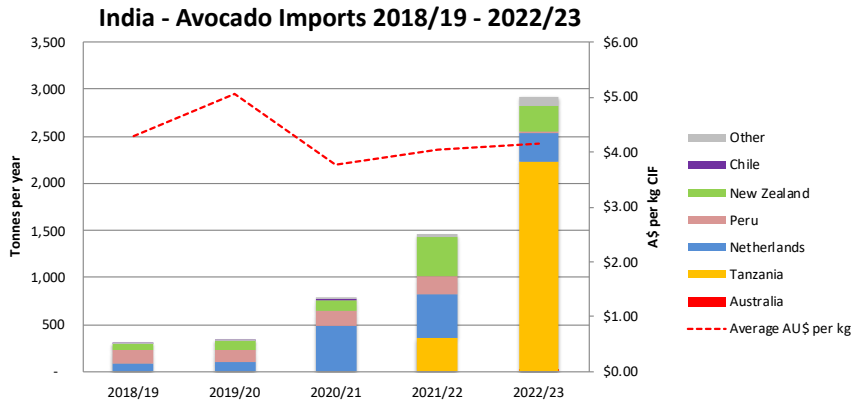
India

Despite the size of the Indian population the import of avocados by India is in its infancy. While Peru appeared to pioneer avocado trade into India along with European re-exporters from Netherlands, Tanzania, powered by the Westfalia group, has now dominated trade in the last 2 years and achieved 76 per cent market share. Trade has lifted to 2,916 tonnes in just over 5 years although this remains negligible in a market of the size of India.

The tariff on avocados by India is 25.7 per cent under the AIECTA which will reduce tariffs for Australia by 4.3 percentage points per year until eliminated after 7 years. The MFN tariff is 30 per cent for all other suppliers without a preferential trade agreement. Avocados from Tanzania enter with ZERO preferential tariff as one of 34 countries eligible with “Least Developed Country” status.

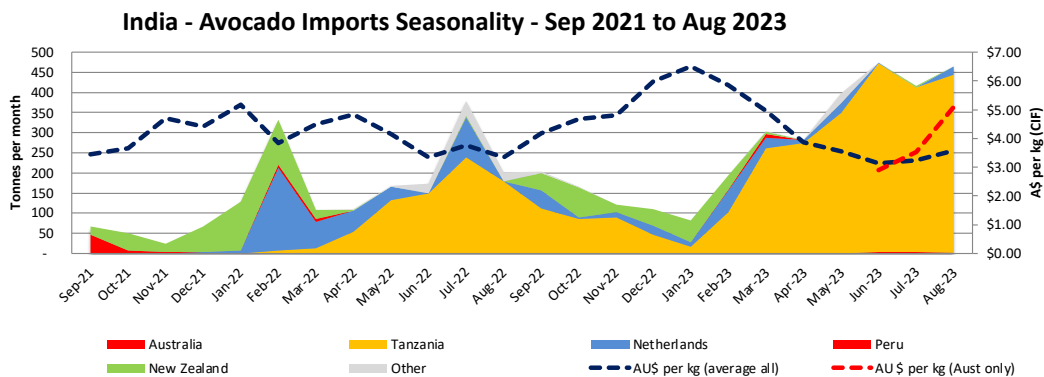
INDIA AT A GLANCE		
Population	1,417.2	million
Urban Share	34.9	per cent
Per capita GDP	8,210	USD PPP
Avocado Production	-	tonnes
Avocado Imports	2,916	tonnes
Reliance on Imports	100.8	per cent
Per capita consumption	0.00	kg p.p.
Southern Seasonality	86.2	per cent
Imports from Australia	3	tonnes
AU Market share	0.1	per cent
Main Competitors	Tanzania	Netherlands
Tariff	25.7%	AIECTA
Access	Protocol	
Avg Import AUD per kg	4.16	all sources
Avg Import USD per kg	2.84	

Although there is no recorded production of avocados in India there are reported to be trial plantings in a very limited scale in Tamil Nadu, Kerala, Maharashtra, Karnataka in the south-central India and in the eastern Himalayan state of Sikkim. Avocados are being introduced to Indian consumers through high end Mexican restaurants and similar outlets, with some supermarkets now stocking them.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 7.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 7.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 7.1 Avocado imports by supplier volume, CIF value and unit value

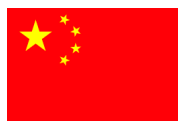
	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	290	331	770	1,464	2,916	99%	78%	100%
Value Million AUD	1.2	1.7	2.9	5.9	12.1	105%	77%	100%
Unit Value AU\$ / Kg	4.29	5.06	3.77	4.04	4.16	3%	-1%	1.00
Australia	-	-	-	-	3			0.1%
Value Million AUD	-	-	-	-	0.0			0.1%
Unit Value AU\$ / Kg					2.91			0.70
Tanzania	-	-	-	355	2,222	527%		76.2%
Value Million AUD	-	-	-	1.5	8.6	473%		70.5%
Unit Value AU\$ / Kg				4.21	3.85	-9%		0.93
Netherlands	92	105	492	464	312	-33%	36%	10.7%
Value Million AUD	0.32	0.52	1.70	1.68	1.64	-3%	50%	13.5%
Unit Value AU\$ / Kg	3.54	4.91	3.46	3.63	5.24	44%	10%	1.26
Peru	140	129	156	194	11	-95%	-48%	0.4%
Value Million AUD	0.54	0.47	0.62	0.64	0.04	-94%	-48%	0.3%
Unit Value AU\$ / Kg	3.86	3.66	3.99	3.32	3.74	13%	-1%	0.90
New Zealand	57	92	116	423	277	-34%	48%	9.5%
Value Million AUD	0.38	0.64	0.54	2.03	1.68	-17%	45%	13.9%
Unit Value AU\$ / Kg	6.55	6.91	4.61	4.80	6.07	26%	-2%	1.46
Chile	0	1	3				-100%	0.0%
Value Million AUD	0.00	0.02	0.03				-100%	0.0%
Unit Value AU\$ / Kg	6.15	11.32	10.95				-100%	-
Kenya	0		1	26	51	95%	860%	1.7%
Value Million AUD	0.00		0.01	0.04	0.14	234%	500%	1.1%
Unit Value AU\$ / Kg	17.33		4.32	1.55	2.65	71%	-37%	0.64
All other	0	4	2	2	40	1895%	291%	1.4%
Value Million AUD	0.00	0.04	0.01	0.01	0.08	601%	226%	0.6%
Unit Value AU\$ / Kg	4.04	9.96	3.77	5.53	1.95	-65%	-17%	0.47
Seasonality by Hemisphere								
Southern Hemisphere	198	222	274	973	2,513	158%	89%	86.2%
Value Million AUD	0.92	1.12	1.19	4.18	10.28	146%	83%	84.8%
Unit Value AU\$ / Kg	4.64	5.05	4.32	4.29	4.09	-5%	-3%	0.98
Northern Hemisphere	92	109	496	491	403	-18%	45%	13.8%
Value Million AUD	0.3	0.6	1.7	1.7	1.8	7%	54%	15.2%
Unit Value AU\$ / Kg	3.54	5.07	3.46	3.52	4.59	30%	7%	1.10

Source: HIS Global Trade Atlas; Fresh Intelligence analysis

India imported 86 per cent of its avocados from the Southern Hemisphere (Tanzania and New Zealand) and 14 per cent from the Northern Hemisphere (Netherlands reexported most likely from Peru). Tanzania was a new supplier in 2022 and has taken 76 per cent market share.

Australia's 2026 Export Strategic Target for India is 1,000 tonnes if a workable protocol is achieved. By September 2023 only 10 tonnes have been supplied for a verification trial.

New Market Access Target Markets for Australian Avocados



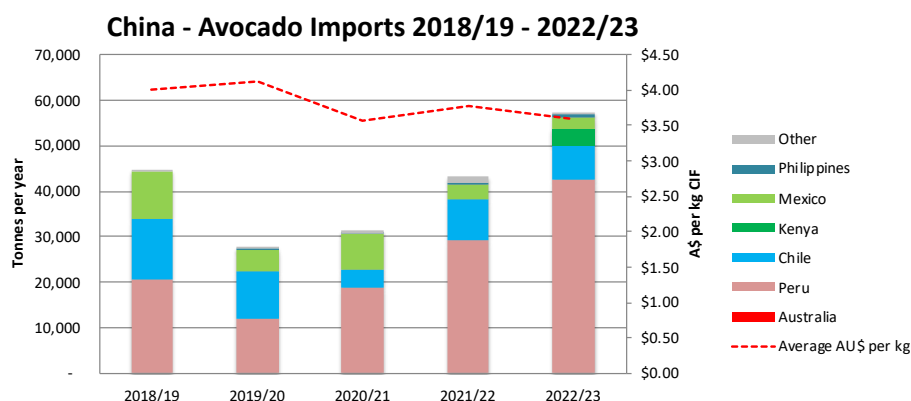
China

Avocados are increasing in demand from Chinese

consumers from local production and imports. In 2022/23 China imported 57,180 tonnes of avocados, which is 33 per cent more than the previous year and growth of 6 per cent per year over 5 years. Consumption is negligible across the 1.4 billion population though is gaining awareness in more high-end areas where promotions are focused. FAOSTAT production records show almost 125,000 tonnes of local production however industry sources suggest that current production is closer to 30,000 tonnes (USDA GAIN).

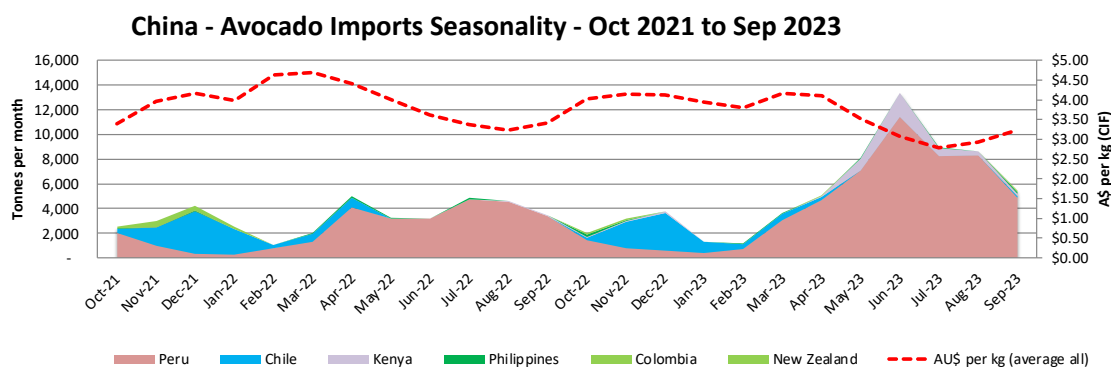
CHINA AT A GLANCE		
Population	1,412.2	million
Urban Share	61.4	per cent
Per capita GDP	21,250	USD PPP
Avocado Production	124,780	tonnes
Avocado Imports	57,180	tonnes
Reliance on Imports	31.4	per cent
Per capita consumption	0.13	kg p.p.
Southern Seasonality	88.3	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	Peru	Chile
Tariff	Nil	ChAFTA
Access	Prohibited	
Avg Import AUD per kg	3.60	all sources
Avg Import USD per kg	2.46	

Imports are sourced mostly from Peru (74 per cent) and Chile (13 per cent). New Zealand gained access in 2018 and Colombia in 2019 (Table 9.1). Peru is gaining market share based on lower price points. Local production may be having an impact on imports. These import suppliers enable year-round supply.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 8.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 8.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

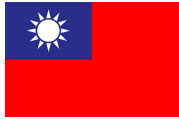
Table 8.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	44,472	27,650	31,271	43,134	57,180	33%	6%	100%
Value Million AUD	178.7	113.9	111.9	163.2	205.8	26%	4%	100%
Unit Value AU\$ / Kg	4.02	4.12	3.58	3.78	3.60	-5%	-3%	1.00
Australia	-	-	-	-	-			0.0%
Value Million AUD	-	-	-	-	-			0.0%
Unit Value AU\$ / Kg	No Trade - market access application submitted							-
Peru	20,757	11,873	18,693	29,354	42,715	46%	20%	74.7%
Value Million AUD	83.1	45.0	65.5	103.8	147.5	42%	15%	71.6%
Unit Value AU\$ / Kg	4.00	3.79	3.50	3.54	3.45	-2%	-4%	0.96
Chile	13,175	10,610	3,961	9,044	7,525	-17%	-13%	13.2%
Value Million AUD	52.59	45.78	18.43	39.31	34.10	-13%	-10%	16.6%
Unit Value AU\$ / Kg	3.99	4.31	4.65	4.35	4.53	4%	3%	1.26
Kenya					3,452			6.0%
Value Million AUD					10.23			5.0%
Unit Value AU\$ / Kg					2.96			0.82
Mexico	10,387	4,792	7,949	3,078	2,651	-14%	-29%	4.6%
Value Million AUD	42.10	21.40	25.23	13.63	10.27	-25%	-30%	5.0%
Unit Value AU\$ / Kg	4.05	4.47	3.17	4.43	3.87	-12%	-1%	1.08
Philippines		106	266	267	534	100%		0.9%
Value Million AUD		0.41	0.93	0.95	2.43	156%		1.2%
Unit Value AU\$ / Kg		3.82	3.47	3.56	4.54	28%		1.26
New Zealand	154	269	99	1,248	250	-80%	13%	0.4%
Value Million AUD	0.88	1.30	0.50	5.00	1.13	-77%	6%	0.5%
Unit Value AU\$ / Kg	5.73	4.81	5.09	4.01	4.52	13%	-6%	1.25
All other			302	143	52	-64%		0.1%
Value Million AUD			1.30	0.47	0.19	-59%		0.1%
Unit Value AU\$ / Kg			4.29	3.27	3.68	13%		
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	34,085	22,752	22,753	39,646	50,490	27%	10%	88.3%
Value Million AUD	136.56	92.07	84.43	148.14	182.70	23%	8%	88.8%
Unit Value AU\$ / Kg	4.01	4.05	3.71	3.74	3.62	-3%	-3%	1.01
Northern Hemisphere	10,387	4,898	8,518	3,488	6,690	92%	-10%	11.7%
Value Million AUD	42.1	21.8	27.4	15.0	23.1	54%	-14%	11.2%
Unit Value AU\$ / Kg	4.05	4.45	3.22	4.31	3.46	-20%	-4%	0.96

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

China imported 88 per cent of its avocados from the Southern Hemisphere (mostly Peru and Chile) and 12 per cent from the Northern Hemisphere (mostly Mexico).

Avocados Australia has submitted a Market Access Application to the Australian Government (DAFF). There is no expectation of a protocol being achieved in 5 years by 2026.



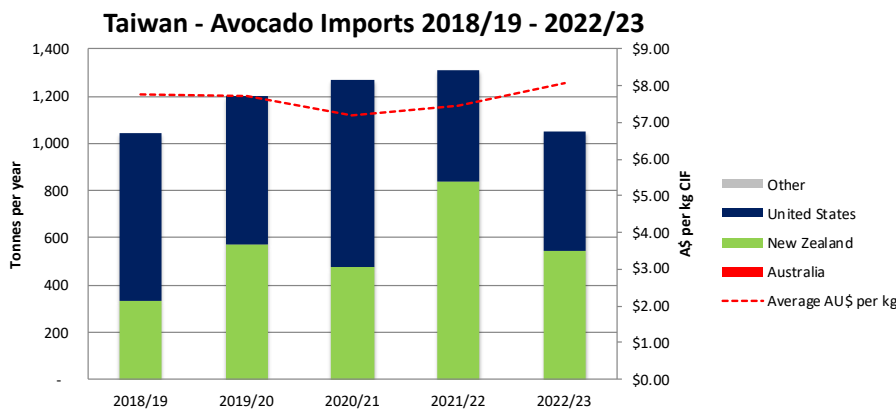
Taiwan

Taiwan is increasing imports of avocados from small base originally from United States and recently from New Zealand which now has a zero tariff. Price levels are high for avocados at over AU\$8.00 per kg. Taiwan imported 1,047 tonnes of avocados in 2022/23.

Taiwan has a small expanding local production though is not yet measured by the FAO. According to the Council of Agriculture land under cultivation for avocados in Taiwan has risen from 506 hectares in 2011 to 1,149 in 2020, with the main growing regions being in Tainan, Chiayi, Taitung, and Pingtung.

Per capita consumption is very low underscoring growth potential as avocados become more accepted by Taiwanese consumers.

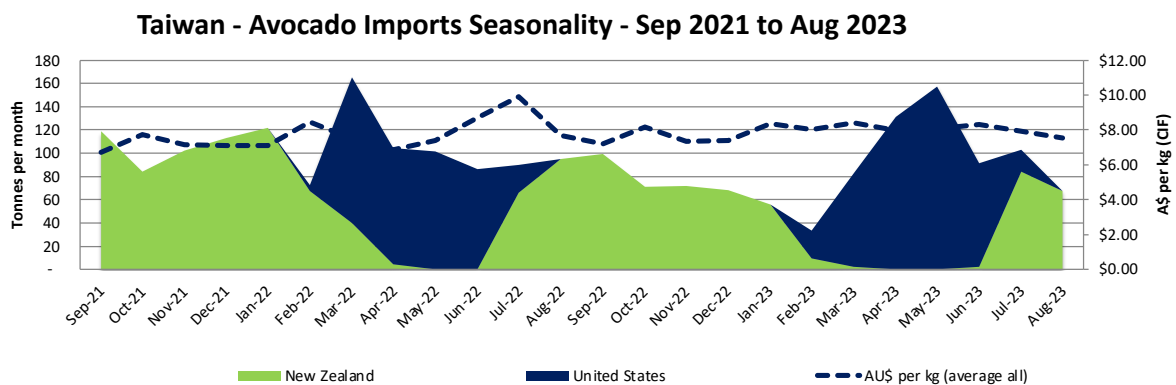
TAIWAN AT A GLANCE		
Population	23.9	million
Urban Share	78.9	per cent
Per capita GDP	35,510	USD PPP
Avocado Production	-	tonnes
Avocado Imports	1,047	tonnes
Reliance on Imports	100.0	per cent
Per capita consumption	0.04	kg p.p.
Southern Seasonality	51.8	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	New Zealand	United States
Tariff	15%	
Access	Prohibited	
Avg Import AUD per kg	8.08	all sources
Avg Import USD per kg	5.52	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 9.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

The trade is split between New Zealand and United States with counter seasonal trade albeit increasing from New Zealand which has a zero tariff.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 9.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 9.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	1,042	1,201	1,266	1,306	1,047	-20%	0%	100%
Value Million AUD	8.1	9.3	9.1	9.7	8.5	-13%	1%	100%
Unit Value AU\$ / Kg	7.75	7.71	7.18	7.44	8.08	9%	1%	1.00
Australia								0.0%
Value Million AUD								0.0%
Unit Value AU\$ / Kg	No Trade- market access application submitted							-
New Zealand	331	569	473	841	543	-35%	13%	51.8%
Value Million AUD	2.9	4.3	3.9	6.3	4.3	-32%	10%	50.8%
Unit Value AU\$ / Kg	8.72	7.48	8.22	7.46	7.92	6%	-2%	0.98
United States	711	632	793	465	504	8%	-8%	48.2%
Value Million AUD	5.19	5.00	5.20	3.44	4.16	21%	-5%	49.2%
Unit Value AU\$ / Kg	7.30	7.91	6.56	7.38	8.25	12%	3%	1.02
Other								-
Value Million AUD								
Unit Value AU\$ / Kg								
Seasonality by Hemisphere								
Southern Hemisphere	331	569	473	841	543	-35%	13%	51.8%
Value Million AUD	2.89	4.26	3.89	6.28	4.30	-32%	10%	50.8%
Unit Value AU\$ / Kg	8.72	7.48	8.22	7.46	7.92	6%	-2%	0.98
Northern Hemisphere	711	632	793	465	504	8%	-8%	48.2%
Value Million AUD	5.2	5.0	5.2	3.4	4.2	21%	-5%	49.2%
Unit Value AU\$ / Kg	7.30	7.91	6.56	7.38	8.25	12%	3%	1.02

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Taiwan imported 52 per cent of its avocados from the Southern Hemisphere (New Zealand) and 48 per cent from the Northern Hemisphere (United States).

Avocados Australia submitted a Market Access Application to the Australian Government (DAFF) in 2022. There is no expectation of a protocol being achieved by 2026.





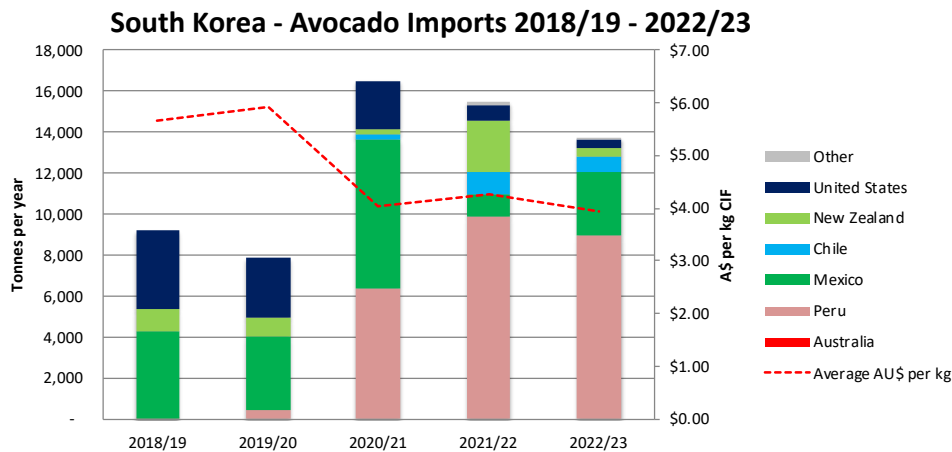
South Korea

South Korea is a rapidly growing importer of avocados. In 2022/23 South

Korea imported 13,741 tonnes of avocados, decreasing 11 per cent in the year though showing 10 per cent growth per year over 5 years. Peru remained the main supplier though Mexican supply increased 171 per cent. Per capita consumption is low at 0.27 kg per person per year though is increasing.

Imports are sourced mostly from Peru (66 per cent) and Mexico (22 per cent). The United States had been benefiting from the Free Trade Agreement (KORUS), which eliminated the 30 per cent tariff in 2013 though has now been almost completely replaced by Peru.

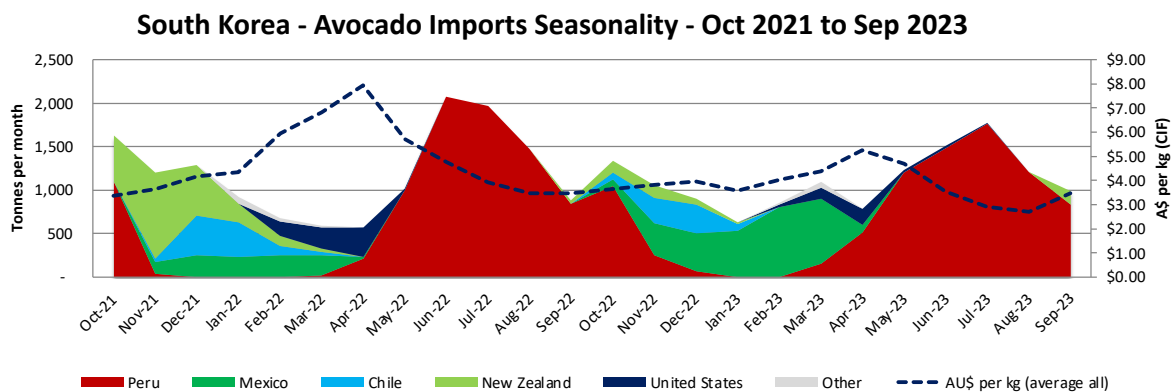
SOUTH KOREA AT A GLANCE		
Population	51.8	million
Urban Share	81.4	per cent
Per capita GDP	31,489	USD PPP
Avocado Production	-	tonnes
Avocado Imports	13,741	tonnes
Reliance on Imports	100.0	per cent
Per capita consumption	0.27	kg p.p.
Southern Seasonality	74.2	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	Peru	Mexico
Tariff	Nil	
Access	Prohibited	
Avg Import AUD per kg	3.94	all sources
Avg Import USD per kg	2.69	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 10.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Peru is now the main supplier from April to October. Mexico is the main supplier from October to March.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 10.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 10.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	9,240	7,903	16,482	15,486	13,741	-11%	10%	100%
Value Million AUD	52.2	46.7	66.4	65.8	54.2	-18%	1%	100%
Unit Value AU\$ / Kg	5.65	5.91	4.03	4.25	3.94	-7%	-9%	1.00
Australia		-	-	-	-			0.0%
Value Million AUD		-	-	-	-			0.0%
Unit Value AU\$ / Kg		No Trade - market access application submitted						-
Peru		428	6,336	9,867	9,001	-9%		65.5%
Value Million AUD		1.9	25.0	38.8	34.7	-10%		64.1%
Unit Value AU\$ / Kg		4.37	3.95	3.93	3.86	-2%		0.98
Mexico	4,279	3,615	7,284	1,125	3,054	171%	-8%	22.2%
Value Million AUD	18.69	17.51	23.62	4.19	10.73	156%	-13%	19.8%
Unit Value AU\$ / Kg	4.37	4.85	3.24	3.73	3.51	-6%	-5%	0.89
Chile			295	1,046	779	-26%		5.7%
Value Million AUD			1.54	5.24	3.97	-24%		7.3%
Unit Value AU\$ / Kg			5.22	5.01	5.10	2%		1.29
New Zealand	1,101	907	234	2,527	419	-83%	-21%	3.0%
Value Million AUD	7.53	5.78	1.21	10.29	2.01	-81%	-28%	3.7%
Unit Value AU\$ / Kg	6.83	6.37	5.18	4.07	4.79	18%	-8%	1.22
United States	3,860	2,953	2,332	774	396	-49%	-43%	2.9%
Value Million AUD	26.00	21.52	14.92	6.73	2.40	-64%	-45%	4.4%
Unit Value AU\$ / Kg	6.74	7.29	6.40	8.69	6.05	-30%	-3%	1.54
Colombia	0	-	2	146	92	-37%		0.7%
Value Million AUD	0.00	-	0.01	0.57	0.35	-39%		0.6%
Unit Value AU\$ / Kg	23.00	-	7.28	3.88	3.77	-3%		0.96
All other								0.0%
Value Million AUD								0.0%
Unit Value AU\$ / Kg								-
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	1,101	1,335	6,865	13,440	10,199	-24%	74%	74.2%
Value Million AUD	7.53	7.64	27.80	54.32	40.70	-25%	52%	75.1%
Unit Value AU\$ / Kg	6.83	5.73	4.05	4.04	3.99	-1%	-13%	1.01
Northern Hemisphere	8,139	6,568	9,618	2,046	3,542	73%	-19%	25.8%
Value Million AUD	44.7	39.0	38.6	11.5	13.5	17%	-26%	24.9%
Unit Value AU\$ / Kg	5.49	5.94	4.01	5.61	3.80	-32%	-9%	0.96

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

South Korea imported 74 per cent of its avocados from the Southern Hemisphere (Peru and New Zealand) and 26 per cent from the Northern Hemisphere (Mexico and United States).

Avocados Australia has submitted a Market Access Application for South Korea to the Australian Government (DAFF). There is no expectation of a protocol being achieved by 2026.



New Zealand

New Zealand is a producer and exporter of avocados and has no measurable imports.

The New Zealand production season runs from July to February indicating a gap in domestic supply from February to June which could be met with a season supply from Australia (Figure 11.1).

New Zealand produces over 38,000 tonnes of avocados per year and retains 22,000 tonnes for domestic consumption after exporting 16,000 tonnes.

NEW ZEALAND AT A GLANCE		
Population	5.1	million
Urban Share	86.7	per cent
Per capita GDP	50,380	
Avocado Production	38,321	tonnes
Avocado Imports	-	tonnes
Reliance on Imports	0.0	per cent
Per capita consumption	4.37	kg p.p.
Southern Seasonality	2.3	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	Thailand	Hong Kong
Tariff	Nil	CER
Access	Protocol	
Avg Import AUD per kg	4.40	all sources
Avg Import USD per kg	3.01	

Australia has access to New Zealand with conditions that are considered unworkable.

According to MiCOR all avocados exported to New Zealand must:

- have had a measure applied for fruit flies of either being sourced from a pest free area (*Tasmania, Riverland or Ord River when not in outbreak*) or have been cold treated at $1^{\circ}\text{C} \pm 0.2^{\circ}\text{C}$ or below for 16 days or longer
- have had a measure applied for *Pseudocercospora purpurea* (*Cercospora spot blotch*) of either in-field controls (at an accredited property) or area freedom, as verified by an official detection survey
- and have been sourced from an area free from Avocado sun blotch viroid (ASBVD), as verified by an official detection survey.

There are no measurable imports of avocados by New Zealand from any source. Figure 11.1 demonstrates the export windows from New Zealand which correlate with the production season leaving an apparent supply gap from February to June.

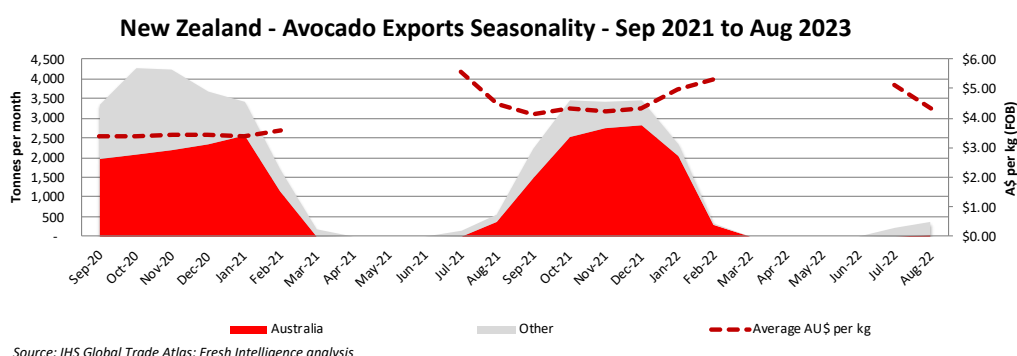


Figure 11.1 Monthly Avocado **exports** by volume and unit price (AU\$ per kg CIF equivalent)

Australia’s 2026 Export Strategic Target for New Zealand is 3,000 tonnes if access is renegotiated with a workable protocol.

Opportunities in Middle East Markets



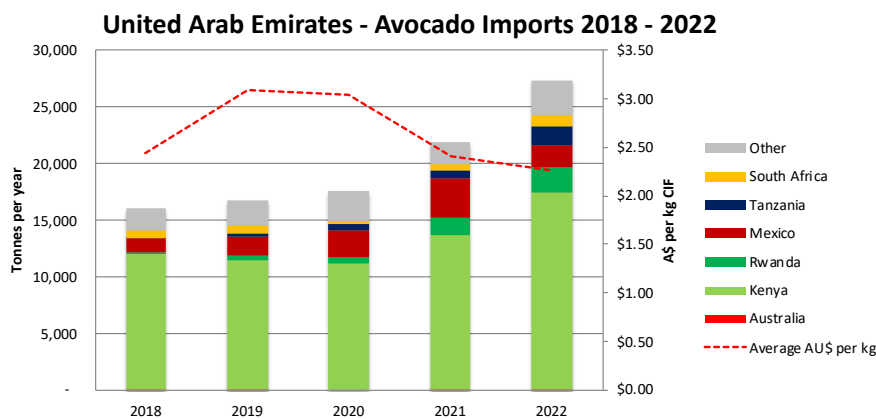
United Arab Emirates

The United Arab Emirates is a trading hub in the Middle East. In 2022 the UAE imported 27,261 tonnes of avocados and re-exported some 6,000 tonnes.

Imports are sourced mostly from Kenya (64 per cent) and Mexico (7 per cent) and many other suppliers in Central Africa. The import growth trend has been 14 per cent per year over the last 5 years. Kenya is the fastest growing suppliers of avocados to the UAE and has lower unit values than most other suppliers (Table 12.1).

Records show that Australia has supplied 17 tonnes in 2022.

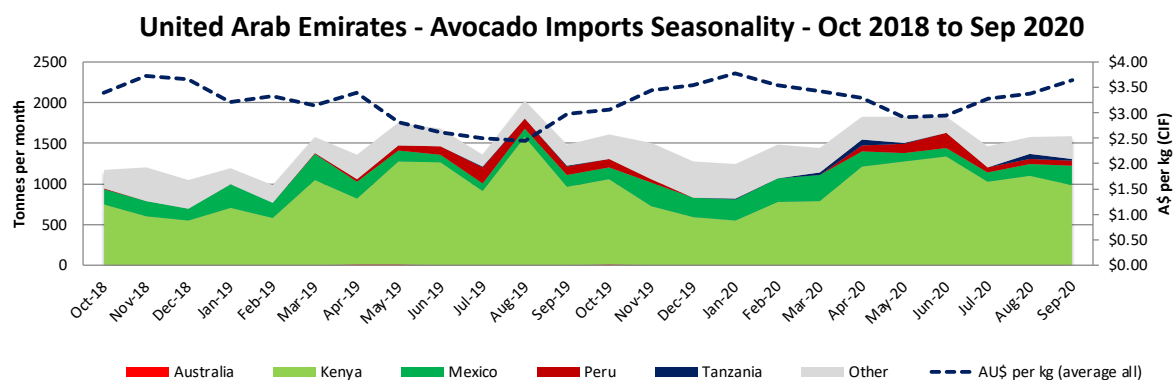
UNITED ARAB EMIRATES AT A GLANCE		
Population	9.4	million
Urban Share	87.0	per cent
Per capita GDP	87,300	USD PPP
Avocado Production	-	tonnes
Avocado Imports	27,261	tonnes
Reliance on Imports	129.8	per cent
Per capita consumption	2.22	kg p.p.
Southern Seasonality	4.8	per cent
Imports from Australia	17	tonnes
AU Market share	0.1	per cent
Main Competitors	Kenya	Mexico
Tariff	Nil	
Access	Open	
Avg Import AUD per kg	2.26	all sources
Avg Import USD per kg	1.55	



Source: ITC TradeMap; Fresh Intelligence analysis

Figure 12.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

The trade is split between Kenya and Mexico with increasing volumes from Central African countries including Tanzania and Rwanda with lower price points that is driving values lower. The monthly trade pattern is indicative as there is no reliable data updated beyond 2020 (Figure 12.2).



Source: ITC TradeMap; Fresh Intelligence analysis

Figure 12.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent) 2020 data

Table 12.1 Avocado imports by supplier volume, CIF value and unit value

	2018	2019	2020	2021	2022	1 yr chg	5 yr trend	2022 share
Volume Tonnes	16,071	16,720	17,602	21,920	27,261	24%	14%	100%
Value Million AUD	39.3	51.7	53.6	52.9	61.6	17%	12%	100%
Unit Value AU\$ / Kg	2.45	3.09	3.05	2.41	2.26	-6%	-2%	1.00
Australia	10	5	-	101	17	-83%	14%	0.1%
Value Million AUD	0.0	0.0	0.0	0.4	0.1	-70%	29%	0.2%
Unit Value AU\$ / Kg	4.10	7.20		3.79	6.76	78%	13%	2.99
Kenya	12,021	11,464	11,164	13,650	17,464	28%	10%	64.1%
Value Million AUD	22.3	24.9	24.6	23.3	29.0	24%	7%	47.1%
Unit Value AU\$ / Kg	1.86	2.17	2.20	1.71	1.66	-3%	-3%	0.74
Rwanda	139	406	642	1,403	2,224	59%	100%	8.2%
Value Million AUD	0.29	0.83	1.63	3.54	6.82	93%	121%	11.1%
Unit Value AU\$ / Kg	2.06	2.03	2.54	2.52	3.07	22%	11%	1.36
Mexico	1,202	1,724	2,234	3,486	1,861	-47%	12%	6.8%
Value Million AUD	3.78	7.58	8.81	11.34	8.07	-29%	21%	13.1%
Unit Value AU\$ / Kg	3.14	4.40	3.94	3.25	4.34	33%	8%	1.92
Tanzania	10	181	554	720	1,655	130%	259%	6.1%
Value Million AUD	0.01	0.21	0.98	1.02	3.93	284%	371%	6.4%
Unit Value AU\$ / Kg	0.80	1.18	1.76	1.42	2.37	67%	31%	1.05
South Africa	717	765	313	575	1,107	93%	11%	4.1%
Value Million AUD	2.43	2.84	0.99	1.51	3.08	104%	6%	5.0%
Unit Value AU\$ / Kg	3.39	3.72	3.15	2.63	2.78	6%	-5%	1.23
Netherlands	963	1,335	1,544	1,040	866	-17%	-3%	3.2%
Value Million AUD	6.60	11.31	13.07	8.38	5.82	-30%	-3%	9.4%
Unit Value AU\$ / Kg	6.85	8.47	8.46	8.05	6.72	-17%	0%	2.97
All other	1,009	840	1,151	945	2,067	119%	20%	7.6%
Value Million AUD	3.86	4.00	3.55	3.33	4.78	43%	5%	7.7%
Unit Value AU\$ / Kg	3.83	4.77	3.08	3.53	2.31	-35%	-12%	1.02
Seasonality by Hemisphere								
Southern Hemisphere	862	1,071	1,093	1,687	2,972	76%	36%	10.9%
Value Million AUD	2.80	3.49	2.61	3.65	7.45	104%	28%	12.1%
Unit Value AU\$ / Kg	3.25	3.26	2.39	2.16	2.51	16%	-6%	1.11
Northern Hemisphere	15,209	15,649	16,509	20,233	24,289	20%	12%	89.1%
Value Million AUD	36.5	48.2	51.0	49.2	54.2	10%	10%	87.9%
Unit Value AU\$ / Kg	2.40	3.08	3.09	2.43	2.23	-8%	-2%	0.99

Source: ITC TradeMap; Fresh Intelligence analysis

The United Arab Emirates imported 11 per cent of its avocados from the Southern Hemisphere (Tanzania and South Africa) and 89 per cent from the Northern Hemisphere (Kenya and Mexico). Increasing supply from Central Africa in equatorial latitudes reduces the significance of the North / South supply measure.

Australia's 2026 Export Strategic Target for United Arab Emirates is 500 tonnes.

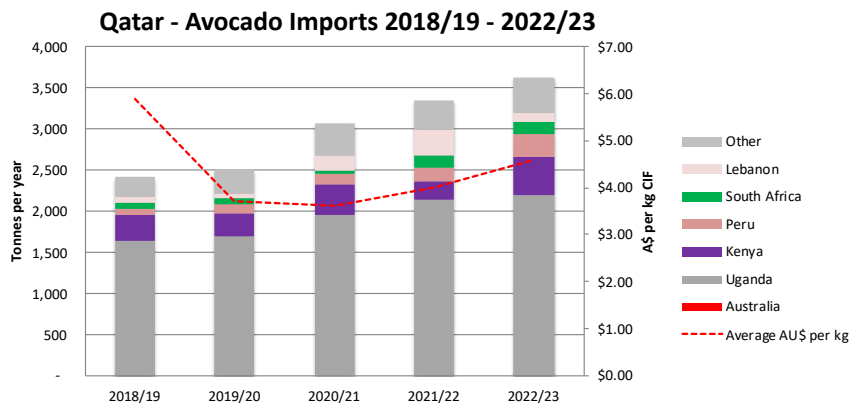


Qatar

Qatar is another small and fast-growing importer of avocados in the Middle East. In 2022 Qatar imported 3,625 tonnes of avocados, which accounted for 100 per cent of the country's total consumption.

Around 75 per cent of imports are sourced from Uganda and Kenya, though there are many other suppliers. The import growth trend has been 11 per cent per year over the last 5 years. Uganda is the fastest growing supplier of avocados to Qatar and has very low unit values (Table 12.1). Qatar is the main export destination for Uganda's rapidly growing avocado industry

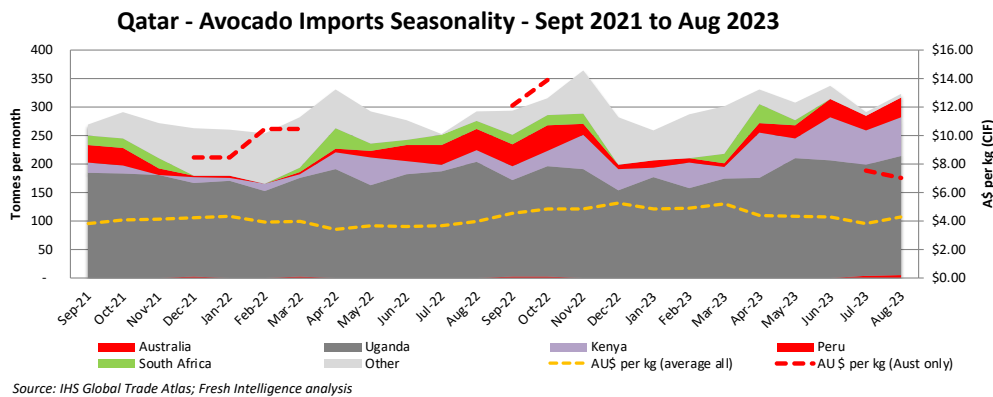
QATAR AT A GLANCE		
Population	2.9	million
Urban Share	99.2	per cent
Per capita GDP	50,805	(USD PPP)
Avocado Production	-	tonnes
Avocado Imports	3,339	tonnes
Reliance on Imports	100.0	per cent
Per capita consumption	1.16	kg p.p.
Southern Seasonality	11.1	per cent
Imports from Australia	4	tonnes
AU Market share	0.1	per cent
Main Competitors	Uganda	Lebanon
Tariff	Nil	
Access	Open	
Avg Import AUD per kg	3.99	all sources
Avg Import USD per kg	2.88	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 12.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Uganda supplies Qatar on a year-round basis with a dominant market share supplemented by Lebanon and several others with counter seasonal trade. Australia supplied just 4 tonnes in 2022/23 though has supplied 8 tonnes in July / August 2023 with a lower recorded price point.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 12.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 12.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	2,426	2,520	3,074	3,339	3,625	9%	11%	100%
Value Million AUD	14.3	9.3	11.1	13.3	16.6	25%	4%	100%
Unit Value AU\$ / Kg	5.88	3.70	3.62	3.99	4.58	15%	-6%	1.00
Australia	3	3	-	4	4	-15%	8%	0.1%
Value Million AUD	0.0	0.0	-	0.0	0.0	17%	23%	0.3%
Unit Value AU\$ / Kg	7.87	7.03		9.35	12.97	39%	13%	2.83
Uganda	1,635	1,692	1,963	2,129	2,201	3%	8%	60.7%
Value Million AUD	2.6	3.4	4.5	4.9	6.2	28%	25%	37.4%
Unit Value AU\$ / Kg	1.57	2.02	2.27	2.29	2.82	23%	16%	0.62
Kenya	321	280	358	223	452	103%	9%	12.5%
Value Million AUD	0.99	1.05	1.06	0.67	1.62	141%	13%	9.7%
Unit Value AU\$ / Kg	3.09	3.75	2.96	3.00	3.57	19%	4%	0.78
Peru	70	116	128	179	282	58%	42%	7.8%
Value Million AUD	0.61	1.29	1.26	1.70	3.01	76%	49%	18.1%
Unit Value AU\$ / Kg	8.79	11.12	9.86	9.52	10.66	12%	5%	2.33
South Africa	67	67	41	143	141	-1%	20%	3.9%
Value Million AUD	0.44	0.47	0.29	1.37	0.85	-37%	18%	5.1%
Unit Value AU\$ / Kg	6.56	6.97	7.23	9.56	6.06	-37%	-2%	1.32
Lebanon	76	55	182	324	110	-66%	10%	3.0%
Value Million AUD	0.31	0.30	0.71	1.61	0.61	-62%	18%	3.7%
Unit Value AU\$ / Kg	4.14	5.51	3.89	4.96	5.51	11%	7%	1.20
Colombia	14	41	52	68	101	50%	64%	2.8%
Value Million AUD	0.13	0.45	0.52	0.66	1.13	70%	70%	6.8%
Unit Value AU\$ / Kg	9.53	10.91	9.98	9.80	11.12	13%	4%	2.43
All other	241	266	349	270	333	23%	8%	9.2%
Value Million AUD	9.19	2.33	2.83	2.41	3.15	31%	-23%	18.9%
Unit Value AU\$ / Kg	38.15	8.78	8.09	8.94	9.45	6%	-29%	2.06
Seasonality by Hemisphere								
Southern Hemisphere	158	208	204	393	523	33%	35%	14.4%
Value Million AUD	1.24	2.12	1.91	3.85	5.06	32%	42%	30.5%
Unit Value AU\$ / Kg	7.85	10.20	9.36	9.79	9.68	-1%	5%	2.11
Northern Hemisphere	2,267	2,312	2,870	2,946	3,102	5%	8%	85.6%
Value Million AUD	13.0	7.2	9.2	9.5	11.6	22%	-3%	69.5%
Unit Value AU\$ / Kg	5.74	3.11	3.21	3.22	3.73	16%	-10%	0.81

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Qatar imported 14 per cent of its avocados from the Southern Hemisphere (Peru, South Africa) and 86 per cent from the Northern Hemisphere (Uganda).

Australia's 2026 Export Strategic Target for Qatar is 200 tonnes.

Other Leading Global Avocado Import Markets



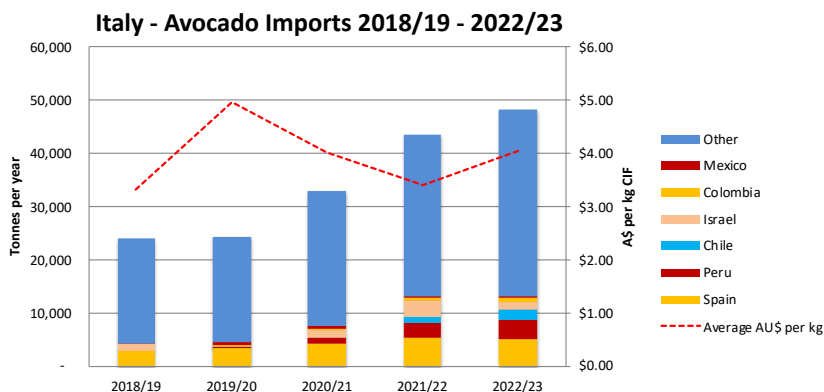
Italy

Italy is recording the most rapid growth of avocado

imports in Europe with 19 per cent growth per year over 5 years. In 2022/23 Italy imported 48,115 tonnes of avocados, which accounted for 105 per cent of the country's total consumption, since Italy re-exported some of its imported avocados to Slovenia and other close European counties. Per capita consumption is low compared to Europe overall and underscores some growth potential.

Imports are sourced mostly from other European countries notably Netherlands and France (72 per cent), which in turn are most likely sourced from Latin America and African producers. Israel and Peru are increasing direct supply. The import growth trend has been 24 per cent per year over the last 5 years with growth driven strongly by Peru (Table 13.1).

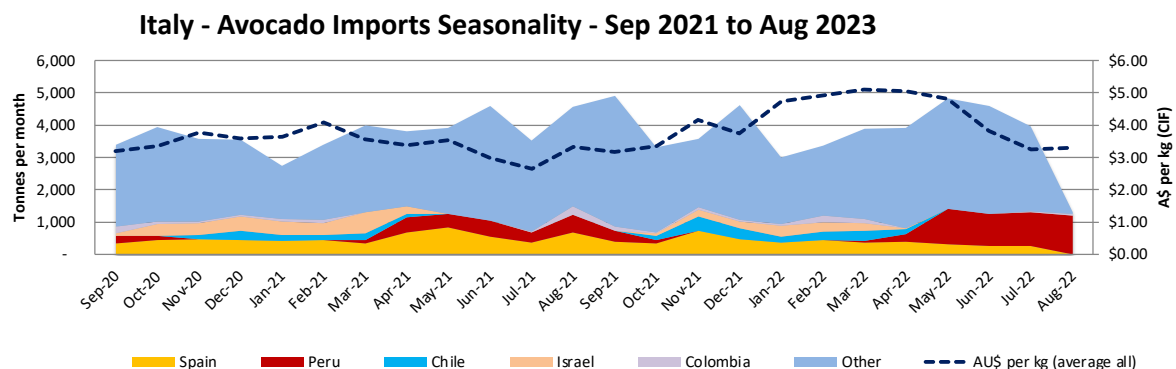
ITALY AT A GLANCE		
Population	58.9	million
Urban Share	71.0	per cent
Per capita GDP	52,470	USD PPP
Avocado Production	-	tonnes
Avocado Imports	48,115	tonnes
Reliance on Imports	104.9	per cent
Per capita consumption	0.78	kg p.p.
Southern Seasonality	11.4	per cent
Imports from Australia	5,145	tonnes
AU Market share	10.7	per cent
Main Competitors	Peru	Chile
Tariff		
Access		
Avg Import AUD per kg	4.05	all sources
Avg Import USD per kg	2.77	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 13.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

While other European countries appear to be the main suppliers the origin of avocados remain mostly outside of Europe with exception of some supplies from Spain. Peru and Israel are the largest external suppliers.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 13.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 13.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	23,948	24,268	32,804	43,622	48,115	10%	19%	100%
Value Million AUD	79.6	120.4	131.7	148.9	194.7	31%	25%	100%
Unit Value AU\$ / Kg	3.33	4.96	4.02	3.41	4.05	19%	5%	1.00
Spain	2,762	3,402	4,274	5,493	5,145	-6%	17%	10.7%
Value Million AUD	11.0	19.2	22.1	21.1	23.9	13%	21%	12.3%
Unit Value AU\$ / Kg	3.99	5.63	5.17	3.83	4.64	21%	4%	1.15
Peru	42	183	1,177	2,770	3,672	33%	205%	7.6%
Value Million AUD	0.1	0.8	4.1	10.1	18.2	80%	281%	9.4%
Unit Value AU\$ / Kg	2.05	4.42	3.49	3.66	4.96	36%	25%	1.23
Chile	-	46	-	1,080	1,800	67%	-	3.7%
Value Million AUD	-	0.26	-	4.47	8.77	96%	-	4.5%
Unit Value AU\$ / Kg	-	5.63	-	4.14	4.87	18%	-	1.20
Israel	1,425	208	1,322	2,937	1,379	-53%	-1%	2.9%
Value Million AUD	4.32	0.85	5.65	10.52	7.08	-33%	13%	3.6%
Unit Value AU\$ / Kg	3.03	4.07	4.28	3.58	5.13	43%	14%	1.27
Colombia	-	165	161	606	964	59%	-	2.0%
Value Million AUD	-	0.78	0.58	2.25	3.37	50%	-	1.7%
Unit Value AU\$ / Kg	-	4.72	3.61	3.72	3.50	-6%	-	0.86
Mexico	8	470	701	290	242	-16%	132%	0.5%
Value Million AUD	0.05	2.29	2.64	1.18	1.19	1%	116%	0.6%
Unit Value AU\$ / Kg	6.49	4.88	3.77	4.06	4.89	20%	-7%	1.21
Other Europe re export	19,631	19,573	24,870	30,111	34,595	15%	15%	71.9%
Value Million AUD	63.85	95.20	95.47	97.90	130.82	34%	20%	67.2%
Unit Value AU\$ / Kg	3.25	4.86	3.84	3.25	3.78	16%	4%	0.93
All other	81	221	299	336	317	-5%	41%	0.7%
Value Million AUD	0.31	1.06	1.19	1.35	1.41	5%	46%	0.7%
Unit Value AU\$ / Kg	3.83	4.80	3.98	4.01	4.45	11%	4%	1.10
Seasonality by Hemisphere								
Southern Hemisphere	42	229	1,177	3,850	5,472	42%	237%	11.4%
Value Million AUD	0.09	1.07	4.11	14.60	27.00	85%	320%	13.9%
Unit Value AU\$ / Kg	2.05	4.66	3.49	3.79	4.93	30%	24%	1.22
Northern Hemisphere	23,906	24,039	31,627	39,772	42,643	7%	16%	88.6%
Value Million AUD	79.6	119.3	127.6	134.3	167.7	25%	21%	86.1%
Unit Value AU\$ / Kg	3.33	4.96	4.04	3.38	3.93	17%	4%	0.97

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Italy imported 11 per cent of its avocados from the Southern Hemisphere (Peru and Chile) and 89 per cent from the Northern Hemisphere (Europe) although most of European suppliers were re-exported Latin American avocados.

Avocados Australia considered Italy as a potential market with a 2026 target of 300 tonnes, possibly from Western Australia in the November to January period. Compliance with MRL standards is problematic for supplying Europe via Italy – Australia’s closest major European port.



United Kingdom

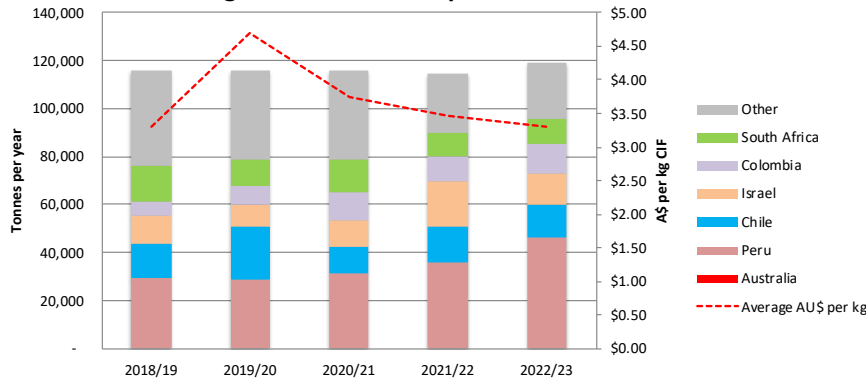
The United Kingdom is one of the largest importers of avocados in Europe. In

2022/23 the United Kingdom imported 118,938 tonnes of avocados, which accounted for 106 per cent of the country's total consumption, since the United Kingdom re-exported some of its imported avocados to Ireland and has no measurable local production.

Imports are sourced mostly from Peru (39 per cent), and Israel (11 per cent) while Chile, South Africa, and Colombia are all supplying around 10 per cent each. In addition, 7 per cent is supplied from Spain and 15 per cent from other Europe including the Netherlands, which most likely include re-exports from southern suppliers. The import growth trend has been 1 per cent per year over the last 5 years with growth driven strongly by Peru (Table 14.1).

UNITED KINGDOM AT A GLANCE		
Population	67.0	million
Urban Share	83.9	per cent
Per capita GDP	54,920	USD PPP
Avocado Production	-	tonnes
Avocado Imports	118,938	tonnes
Reliance on Imports	106.5	per cent
Per capita consumption	1.67	kg p.p.
Southern Seasonality	58.9	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	Peru	Israel
Tariff	Eliminated	AUKFTA
Access	Open	MRL's
Avg Import AUD per kg	3.30	all sources
Avg Import USD per kg	2.25	

United Kingdom - Avocado Imports 2018/19 - 2022/23

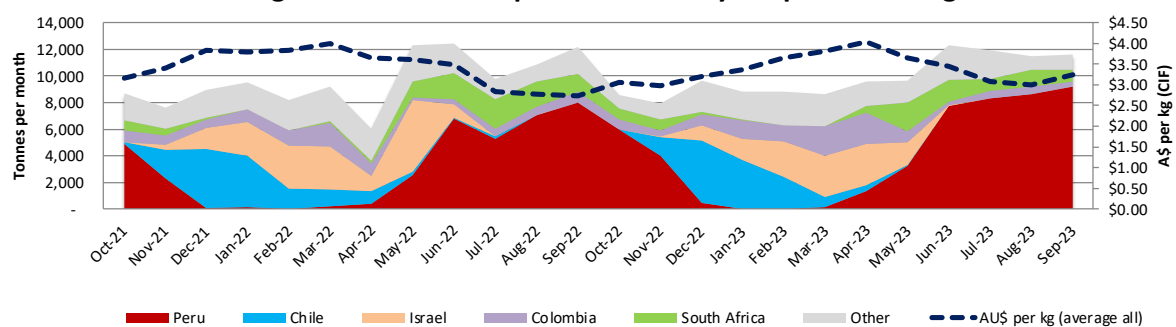


Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 14.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

The trade consists of multiple suppliers to balance a year-round supply. While Peru leads in the same period as South Africa there is increasing trade from Colombia and Israel.

United Kingdom - Avocado Imports Seasonality - Sep 2021 to Aug 2023



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 14.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 14.1 Avocado imports by supplier volume, CIF value and unit value

	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	115,544	115,813	115,584	114,347	118,938	4%	1%	100%
Value Million AUD	380.2	544.6	432.9	397.0	393.2	-1%	1%	100%
Unit Value AU\$ / Kg	3.29	4.70	3.75	3.47	3.30	-5%	0%	1.00
Australia	-	-	No Trade					0.0%
Value Million AUD	-	-						0.0%
Unit Value AU\$ / Kg								-
Peru	29,627	28,785	31,680	35,998	46,335	29%	12%	39.0%
Value Million AUD	94.8	121.8	101.2	114.5	143.2	25%	11%	36.5%
Unit Value AU\$ / Kg	3.20	4.23	3.19	3.18	3.09	-3%	-1%	0.94
Chile	14,153	21,912	10,789	14,935	13,476	-10%	-1%	11.3%
Value Million AUD	42.55	113.11	46.16	56.59	44.42	-22%	1%	11.3%
Unit Value AU\$ / Kg	3.01	5.16	4.28	3.79	3.30	-13%	2%	1.00
Israel	11,397	9,171	10,939	18,586	13,434	-28%	4%	11.3%
Value Million AUD	47.05	47.68	52.05	71.39	54.79	-23%	4%	14.0%
Unit Value AU\$ / Kg	4.13	5.20	4.76	3.84	4.08	6%	0%	1.24
Colombia	5,833	8,098	11,969	10,557	12,306	17%	21%	10.3%
Value Million AUD	19.05	31.70	42.20	35.19	41.28	17%	21%	10.5%
Unit Value AU\$ / Kg	3.27	3.91	3.53	3.33	3.35	1%	1%	1.02
South Africa	15,172	11,164	13,352	9,796	10,252	5%	-9%	8.6%
Value Million AUD	40.34	42.11	38.19	30.35	32.64	8%	-5%	8.3%
Unit Value AU\$ / Kg	2.66	3.77	2.86	3.10	3.18	3%	5%	0.97
Tanzania	736	930	1,160	1,560	3,265	109%	45%	2.7%
Value Million AUD	1.86	4.51	3.42	4.81	8.72	81%	47%	2.2%
Unit Value AU\$ / Kg	2.52	4.86	2.95	3.09	2.67	-13%	1%	0.81
All other	38,626	35,755	35,696	22,915	19,870	-13%	-15%	16.7%
Value Million AUD	134.50	183.69	149.65	84.14	66.92	-20%	-16%	17.1%
Unit Value AU\$ / Kg	3.48	5.14	4.19	3.67	3.37	-8%	-1%	1.02
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	58,951	61,860	55,821	60,729	70,063	15%	4%	58.9%
Value Million AUD	177.74	277.05	185.54	201.48	220.30	9%	6%	56.2%
Unit Value AU\$ / Kg	3.02	4.48	3.32	3.32	3.14	-5%	1%	0.95
Northern Hemisphere	56,593	53,953	59,763	53,619	48,875	-9%	-4%	41.1%
Value Million AUD	202.5	267.6	247.3	195.5	171.7	-12%	-4%	43.8%
Unit Value AU\$ / Kg	3.58	4.96	4.14	3.65	3.51	-4%	0%	1.07

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

The United Kingdom imported 59 per cent of its avocados from the Southern Hemisphere (Peru and South Africa) and 41 per cent from the Northern Hemisphere (Israel and Spain) although Southern Hemisphere supply would be higher after considering re-exports from Netherlands.

Avocados Australia considered United Kingdom as a potential market with a 2026 target of 300 tonnes, most likely from Western Australia in the November to January period.

The AUKFTA eliminated the 4 per cent tariff on entry into force in 2023.

The UK records consistent import (CIF) price between AU\$3.00 - AU\$4.00 which makes sending Australian fruit at a competitive price point problematic to be viable for growers.



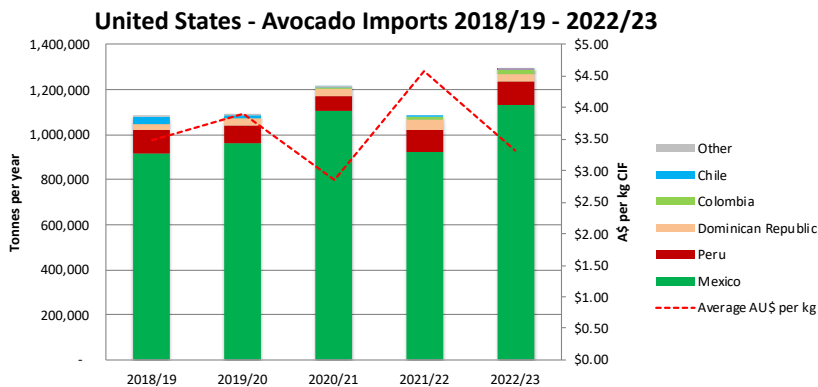
United States

The United States is the world's largest importer of avocados. In 2022/23

the United States imported 1.3 million tonnes of avocados worth AU\$4.3 billion, which accounted for 93.6 per cent of the country's total consumption. The United States produced around 137,000 tonnes of avocados in 2021 mostly in California, which was much lower than the previous year's record crop.

Imports are sourced mostly from Mexico (88 per cent) and from Peru and Dominican Republic during periods of lower supply from Mexico (Figure 15.2). The import growth trend has been 5 per cent per year over the last 5 years and lifted 19 per cent after difficult supply conditions from Mexico eased. Peru was marginally 1 per cent higher and just 1 per cent higher over 5 years albeit with some volatility in this period (Table 15.1). Colombia gained access in 2017 and is increased rapidly to 13,700 tonnes from a zero base and has almost replaced Chile as a secondary supplier.

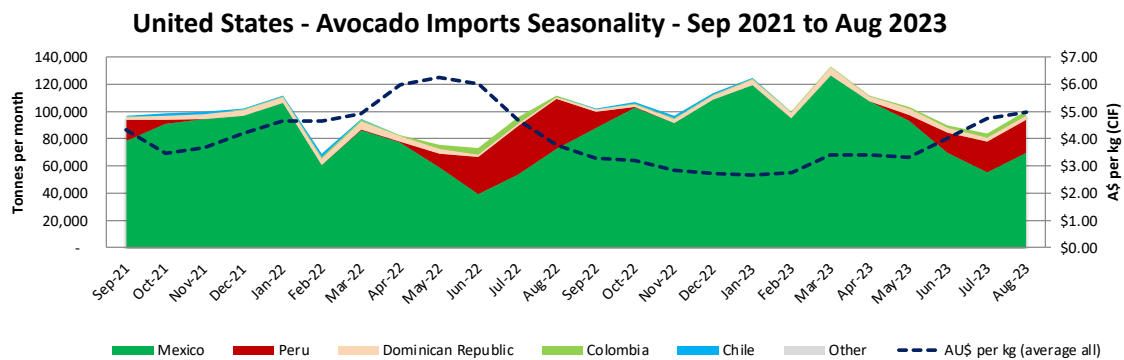
UNITED STATES AT A GLANCE		
Population	333.3	million
Urban Share	82.7	per cent
Per capita GDP	77,530	(USD PPP)
Avocado Production	136,750	tonnes
Avocado Imports	1,288,746	tonnes
Reliance on Imports	93.6	per cent
Per capita consumption	4.13	kg p.p.
Southern Seasonality	8.4	per cent
Imports from Australia	-	tonnes
AU Market share	-	per cent
Main Competitors	Mexico	Peru
Tariff	Nil	AUSFTA
Access	Prohibited	
Avg Import AUD per kg	3.32	all sources
Avg Import USD per kg	2.27	



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 15.1 Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Over 2 years Mexico dominates with Peru supplementing. Price points were higher in 2021/22 driven by supply constraints though have decreased in 2022/23 as supply conditions improved.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 15.2 Monthly Avocado imports by volume and unit price (AU\$ per kg CIF equivalent)

Table 15.1 Avocado imports by supplier volume, CIF value and unit value

United States Avocados		Imports by Volume				Category Fresh Fruit		
	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Volume Tonnes	1,076,830	1,083,934	1,208,767	1,086,965	1,288,746	19%	5%	100%
Value Million AUD	3,760.7	4,221.0	3,458.3	4,976.6	4,274.0	-14%	3%	100%
Unit Value AU\$ / Kg	3.49	3.89	2.86	4.58	3.32	-28%	-1%	1.00
Mexico	917,402	963,538	1,103,320	920,066	1,128,443	23%	5%	87.6%
Value Million AUD	3,231.8	3,769.6	3,149.1	4,442.5	3,758.1	-15%	4%	87.9%
Unit Value AU\$ / Kg	3.52	3.91	2.85	4.83	3.33	-31%	-1%	1.00
Peru	100,948	78,403	69,823	103,398	104,139	1%	1%	8.1%
Value Million AUD	356.4	320.7	231.3	351.0	359.9	3%	0%	8.4%
Unit Value AU\$ / Kg	3.53	4.09	3.31	3.39	3.46	2%	-1%	1.04
Dominican Republic	29,560	27,826	31,799	41,978	38,507	-8%	7%	3.0%
Value Million AUD	62.48	67.29	66.03	95.07	89.74	-6%	9%	2.1%
Unit Value AU\$ / Kg	2.11	2.42	2.08	2.26	2.33	3%	2%	0.70
Colombia	899	1,951	2,847	13,738	13,775	0%	98%	1.1%
Value Million AUD	2.97	6.71	8.13	54.05	46.72	-14%	99%	1.1%
Unit Value AU\$ / Kg	3.30	3.44	2.86	3.93	3.39	-14%	1%	1.02
Chile	28,001	12,215	937	7,784	3,876	-50%	-39%	0.3%
Value Million AUD	107.07	56.69	3.65	33.95	19.55	-42%	-35%	0.5%
Unit Value AU\$ / Kg	3.82	4.64	3.90	4.36	5.04	16%	7%	1.52
All other								
Value Million AUD								
Unit Value AU\$ / Kg								
Seasonality by Hemisphere	2018/19	2019/20	2020/21	2021/22	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	128,949	90,619	70,760	111,183	108,015	-3%	-4%	8.4%
Value Million AUD	463.44	377.38	234.98	384.92	379.44	-1%	-5%	8.9%
Unit Value AU\$ / Kg	3.59	4.16	3.32	3.46	3.51	1%	-1%	1.06
Northern Hemisphere	947,881	993,315	1,138,007	975,782	1,180,731	21%	6%	91.6%
Value Million AUD	3,297.3	3,843.6	3,223.4	4,591.6	3,894.6	-15%	4%	91.1%
Unit Value AU\$ / Kg	3.48	3.87	2.83	4.71	3.30	-30%	-1%	0.99

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

The United States imported 8.4 per cent of its avocados from the Southern Hemisphere (Peru) and 91.6 per cent from the Northern Hemisphere (Mexico). Very small volumes were recorded from other sources including Colombia, which has almost replaced Chile as a secondary supplier.

Despite being the world largest avocado importer the opportunities for Australia are limited given the proximity to Mexico and other large suppliers with average import prices being below the Australian cost of production and freight.

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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. It is funded by Hort Innovation, using the avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

