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# Australian avocado exports and imports

July 2022 to June 2023

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For  
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# Australian avocado export and import summary

- Australian avocado export volumes in 2022/23 were 10,685 tonnes, which was 8.0 per cent lower compared to last year valued at AU\$58.82 million. Unit prices were 23 per cent higher at AU\$5.51 per kg.
- Australian avocado exports had accelerated in 2021/22 influenced by a domestic supply surplus and aggressive competitive pricing in key markets of Hong Kong, Singapore and Malaysia. This momentum eased slightly though remains well ahead of previous years.

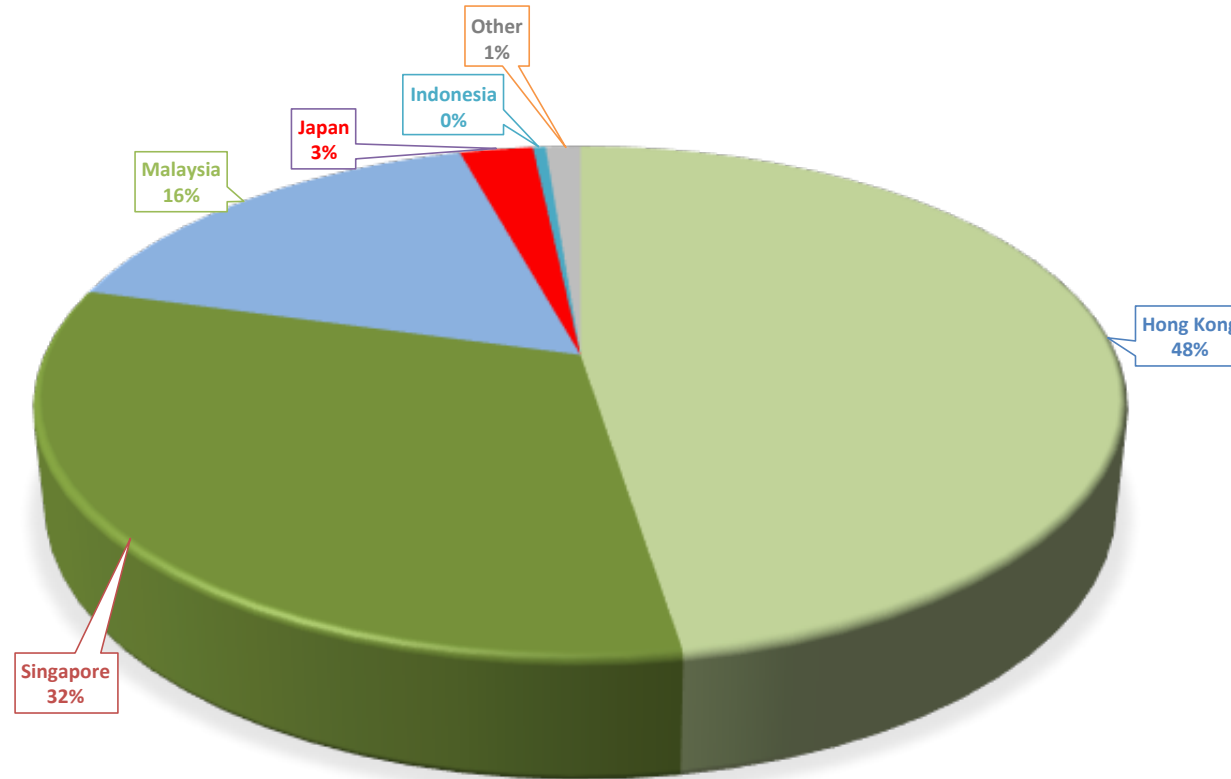
Key Results		July 2022 to June 2023	
Volume	10,685 tonnes	-8.0%	
Value	58.82 million	13.2%	
AU\$ per kg	\$5.51	23.0%	

- **Hong Kong** was the largest export destination and accounted for 48 per cent of all export volumes followed by Singapore with 32 per cent share and Malaysia 16 per cent. Japan accounted for 3 per cent of Australian avocado exports, all from Western Australia.
- Exports from **Queensland** increased 30 per cent to 7,217 tonnes mostly in the March to June period. Western Australia decreased by 54 per cent to 1,210 tonnes. New South Wales eased 30 per cent to 1,527 tonnes while Victoria gave up 50 per cent to 461 tonnes after very strong gains in the previous year.
- **By month**, the unit values tracked higher through most of the year while volumes pared back underscoring the price sensitivity of the export markets and balancing the expectation of growers for viable returns.
- **Globally** 2.93 million tonnes of avocados were exported in 2022/23, including 587,000 tonnes from Europe that are mostly re exported volumes from Latin America. The result was 3.2 per cent lower than the previous year. Australia accounted for 0.4 per cent of global trade.
- **Asian markets** imported 132,000 tonnes of avocados in 2022, which was 16 per cent less than the previous year and 3 per cent less per year over 5 years. Japan remained the largest importer in Asia with 38 per cent share, importing mostly from Mexico though declined 34 per cent in 2022 impacted by supply conditions from Mexico.
- **China** had been the growth driver from zero to 44,000 tonnes by 2018 though held at 41,000 in 2022. South Korea has been a key importer lifting 30 per cent to over 17,000 tonnes in 2021 though fell back 22 per cent in 2022 to 13,500 tonnes. Australia has a significant share of Malaysia and Singapore markets, which combined have a 7 per cent share of all avocado imports by Asian region.
- From July to June 2023 there were 12,896 tonnes of avocados **imported to Australia** worth AU\$54.6 million, which was 2 per cent higher than the previous season. Unit values were 33 per cent higher at A\$4.52 per kg.

# Australian avocado exports by market

In 12 months to June 2023, Hong Kong was the largest export destination and accounted for 48 per cent of all export volumes followed by Singapore with 32 per cent share and Malaysia 16 per cent. Japan accounted for 3 per cent of Australian avocado exports, all from Western Australia.

AVOCADO EXPORTS BY MARKET DESTINATION - 10,685 TONNES  
- 12 MONTHS TO JUNE 2023



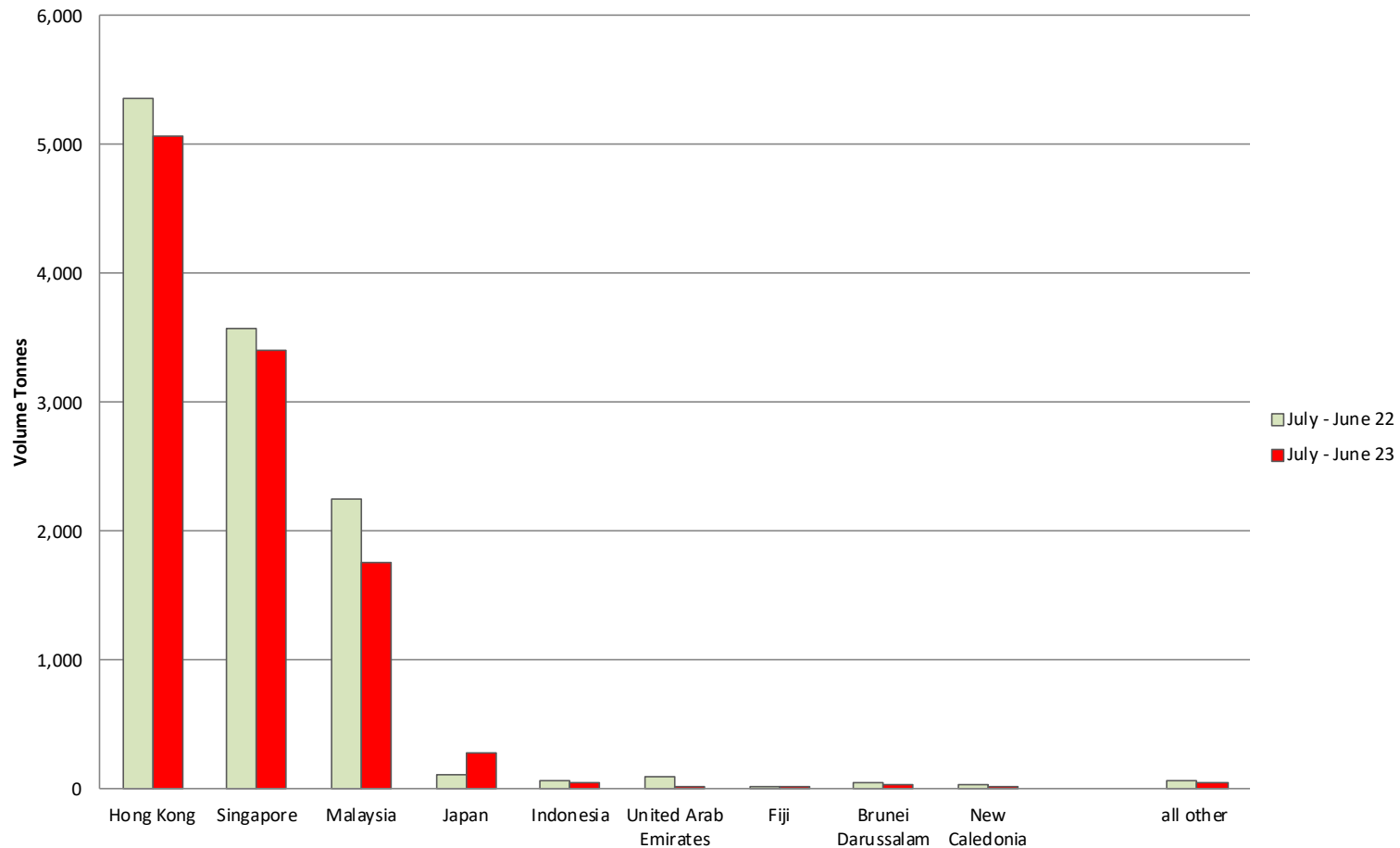
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

## CURRENT SEASON INDICATORS

# Australian avocado exports by market

Hong Kong, Malaysia and Singapore each eased slightly though still accounted for 95.7 per cent of total exports. There were 277 tonnes recorded to Japan and 52 tonnes collectively to Middle East markets.

**Avocado exports by market July to June 2023 vs the previous year**



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

# Australian avocado exports by volume and value by market July 2022 to June 2023

The same results in table form, Hong Kong and Singapore easing around 5 per cent, and Malaysia by 22 per cent after strong grown the previous year. Japan increased by 161 per cent to 277 tonnes. Trade to most other markets were small by comparison.

Overall unit values lifted in most markets.

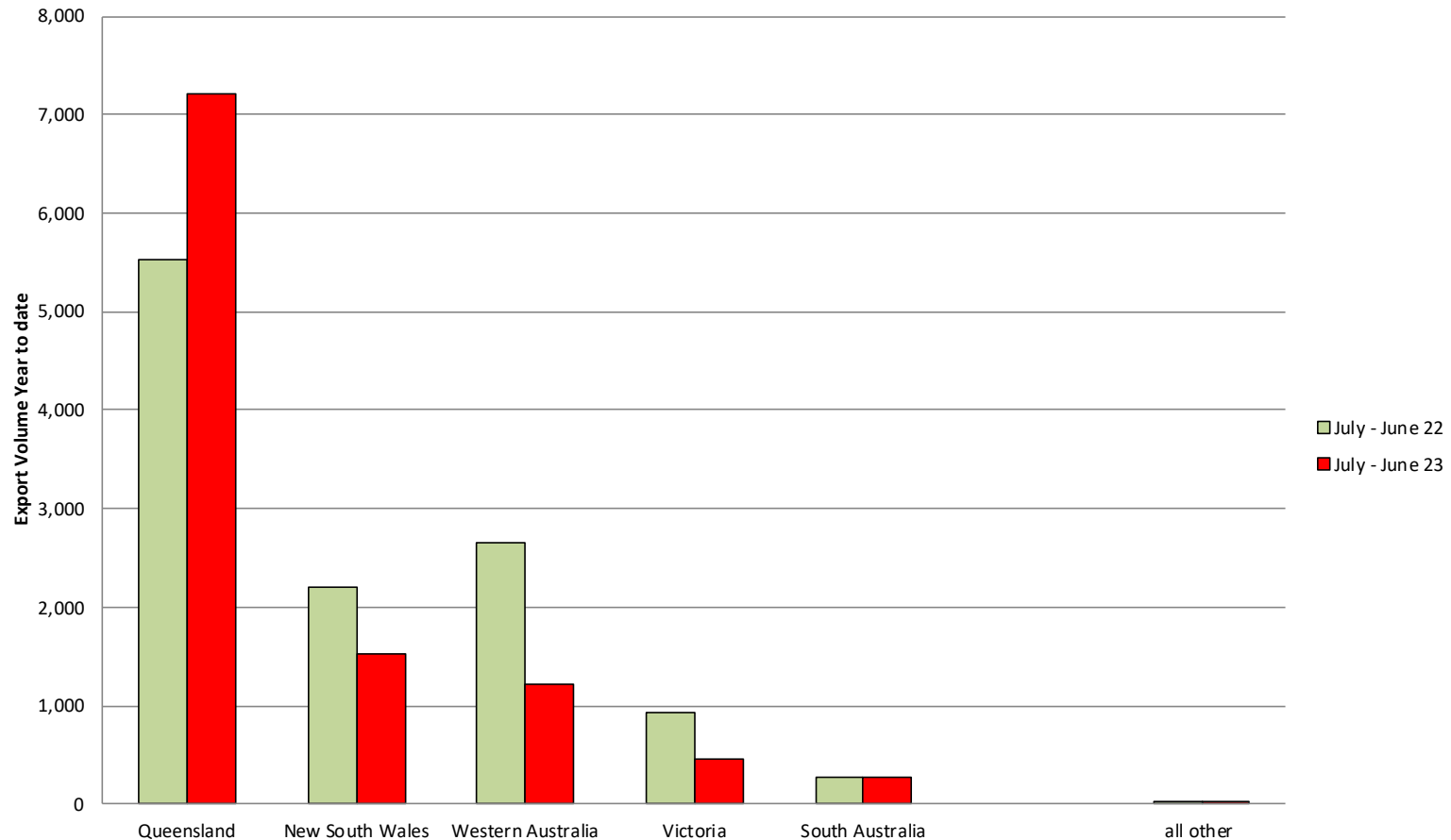
		Key Results July 2022 to June 2023									
		Volume	10,685 tonnes	-8.0%		Value	58.82 million	13.2%		AU\$ per kg	\$5.51
<b>Avocado Exports by Season to date</b>											
Country	Volume Tonnes				Value AU\$ Million				Average AU\$ per KG (FOB)		
	July to Jun-22	July to Jun-23	Change % to 21	Share %	July to Jun-22	July to Jun-23	Change % to 21	Share %	July to Jun-22	July to Jun-23	
TOTAL AVOCADOS	11,611	10,685	-8%	100%	51.98	58.82	13%	100%	4.48	5.51	
Hong Kong	5,358	5,074	-5%	47.5%	24.69	28.90	17%	49.1%	4.61	5.70	
Singapore	3,580	3,403	-5%	31.8%	15.49	17.76	15%	30.2%	4.33	5.22	
Malaysia	2,254	1,752	-22%	16.4%	9.56	9.78	2%	16.6%	4.24	5.58	
Japan	106	277	161%	2.6%	0.69	1.38	101%	2.4%	6.51	5.00	
Indonesia	65	48	-25%	0.5%	0.43	0.38	-13%	0.6%	6.71	7.79	
United Arab Emirates	98	22	-78%	0.2%	0.36	0.14	-62%	0.2%	3.67	6.26	
Fiji	10	18	75%	0.2%	0.08	0.12	65%	0.2%	7.47	7.05	
Brunei Darussalam	48	30	-37%	0.3%	0.20	0.11	-46%	0.2%	4.09	3.51	
New Caledonia	28	22	-22%	0.2%	0.09	0.08	-6%	0.1%	3.08	3.73	
all other	64	40	-38%	0.4%	0.40	0.18	-55%	0.3%	6.16	4.48	
<b>TOTAL Avocados</b>	<b>11,611</b>	<b>10,685</b>	<b>-8.0%</b>	<b>100%</b>	<b>51.98</b>	<b>58.82</b>	<b>13.2%</b>	<b>100%</b>	<b>4.48</b>	<b>5.51</b>	

source : ABS (2023) via IHS Global Trade Atlas ABS data; Fresh Intelligence analysis

# Australian avocado exports by state

Avocado exports from Queensland increased 163 per cent to 5,549 tonnes and Western Australia increased 10 x fold to 2,656 tonnes.

Avocado Exports by State - July to June 2023 vs last year



Source: ABS (2022) via IHS Global Trade Atlas; Fresh Intelligence analysis

# Australian avocado exports by volume and value by state July 2021 to June 2022

Avocado exports from Queensland increased 30 per cent to 7,217 tonnes mostly in the March to June period. Western Australia decreased by 54 per cent to 1,210 tonnes.

New South Wales eased 30 per cent to 1,527 tonnes while Victoria gave up 50 per cent to 461 tonnes after very strong gains in the previous year.

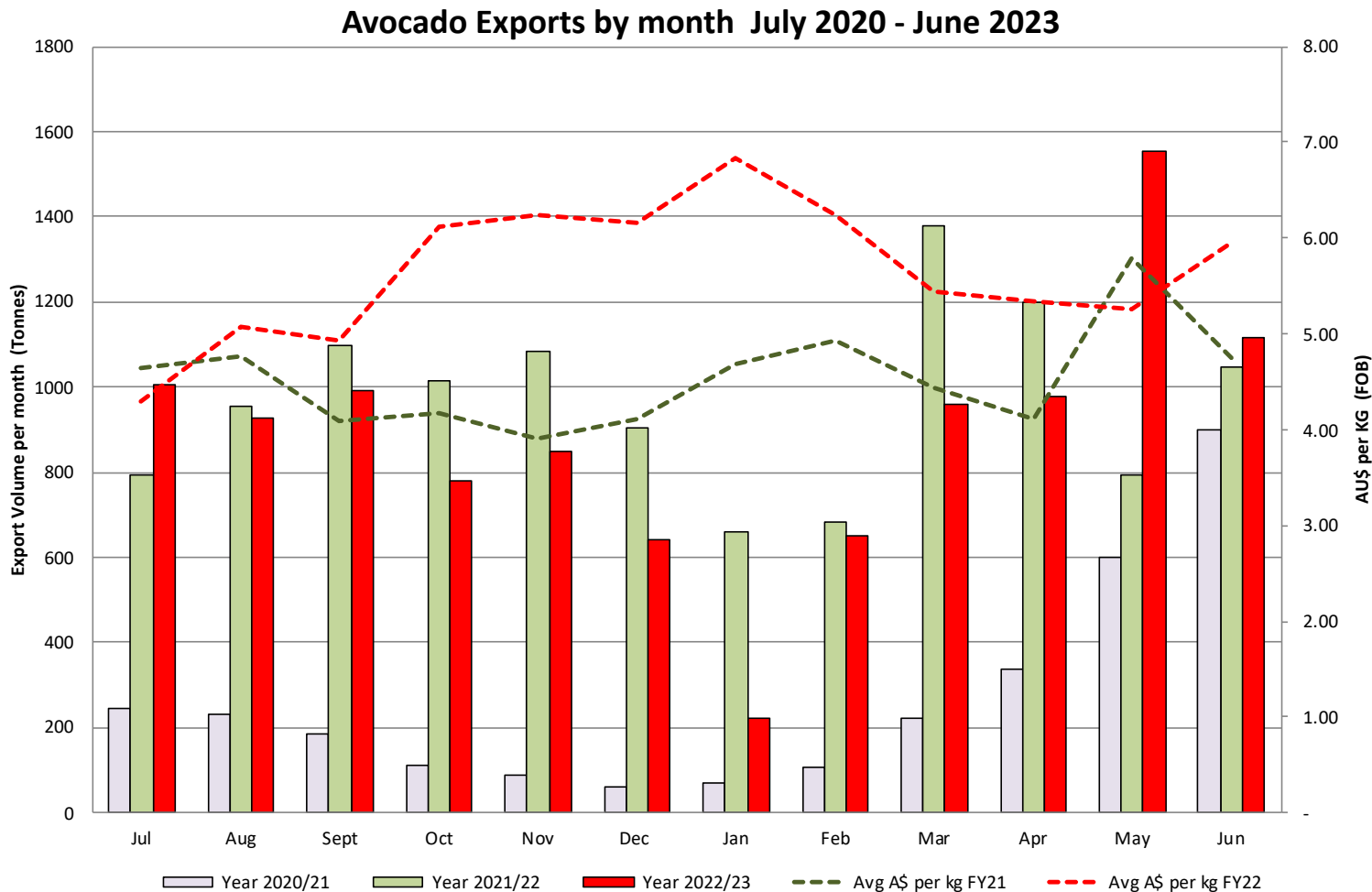
State	Volume Tonnes				Value AU\$ Million				Average AU\$ per KG (FOB)	
	July to Jun-22	July to Jun-23	Change % to 21	Share %	July to Jun-22	July to Jun-23	Change % to 21	Share %	July to Jun-22	July to Jun-23
<b>TOTAL AVOCADOS</b>	11,611	10,685	-8%	100%	51.98	58.82	13%	100%	4.48	5.51
Queensland	5,537	7,217	30%	67.5%	25.56	38.28	50%	65.1%	4.62	5.30
New South Wales	2,195	1,527	-30%	14.3%	9.95	8.93	-10%	15.2%	4.53	5.85
Western Australia	2,653	1,210	-54%	11.3%	11.13	7.14	-36%	12.1%	4.20	5.90
Victoria	926	461	-50%	4.3%	3.95	2.88	-27%	4.9%	4.27	6.25
South Australia	280	267	-5%	2.5%	1.28	1.58	23%	2.7%	4.57	5.92
all other	20	2	-88%	0.0%	0.11	0.01	-87%	0.0%	5.45	5.66
<b>TOTAL Avocados</b>	<b>11,611</b>	<b>10,685</b>	<b>-8.0%</b>	<b>100%</b>	<b>51.98</b>	<b>58.82</b>	<b>13.2%</b>	<b>100%</b>	4.48	5.51

source : ABS (2023) via IHS Global Trade Atlas ABS data; Fresh Intelligence analysis



# Australian avocado exports by month vs last 2 years

The 12 months July to June period was 8 per cent below last year by volume although unit values tracked higher through most of the year underscoring the price sensitivity of the export markets.

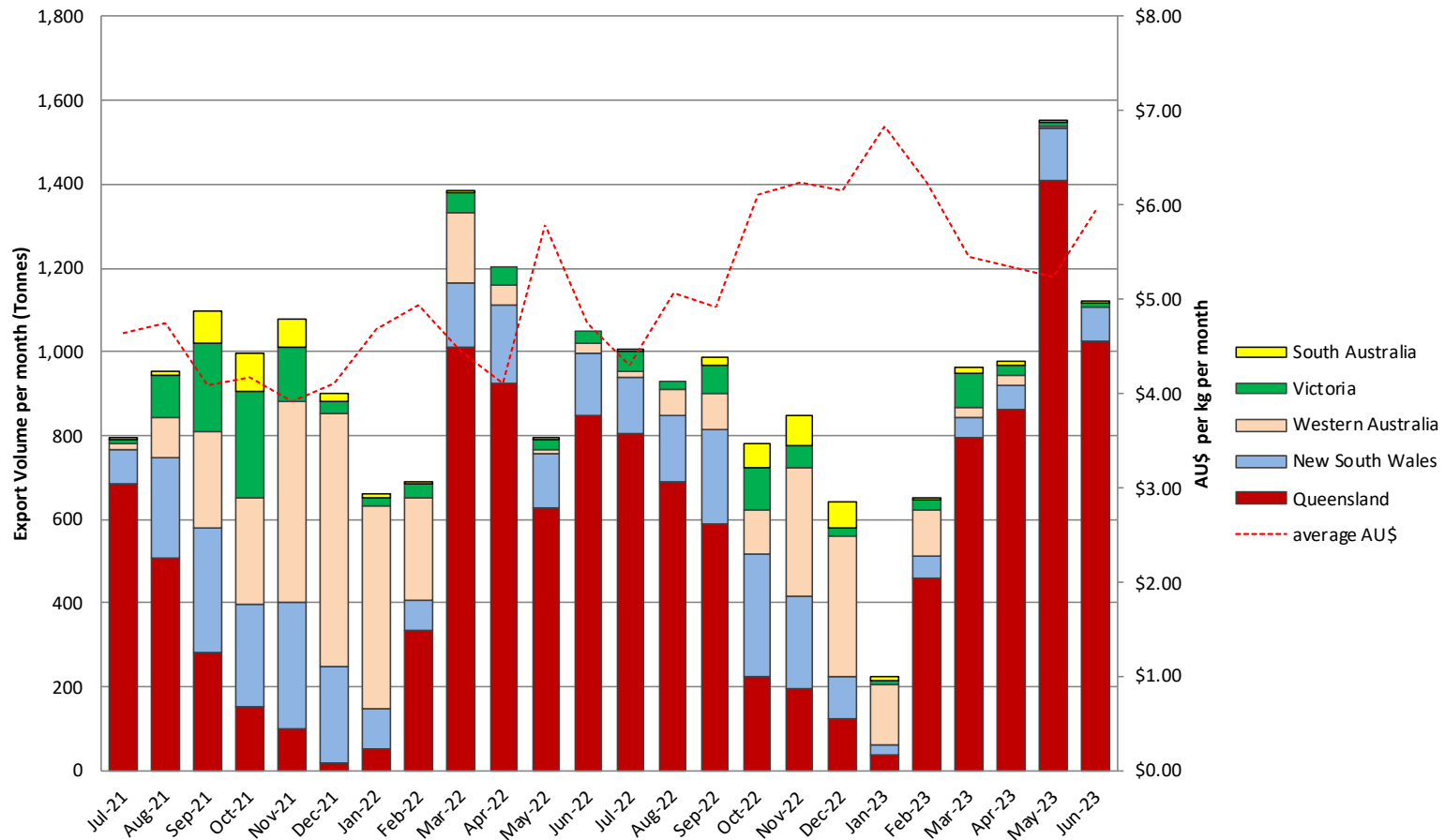


Source: ABS (2022) via IHS Global Trade Atlas; Fresh Intelligence analysis

# Australian avocado exports by state by month over 2 years

Western Australia recovered trade in 2021/22 at lower price levels though eased again in 2022/23 as price levels increased. Queensland commenced the 2023 season prices higher than 2022 though lower than WA prices to regain the higher volumes achieved later in the 2022 season.

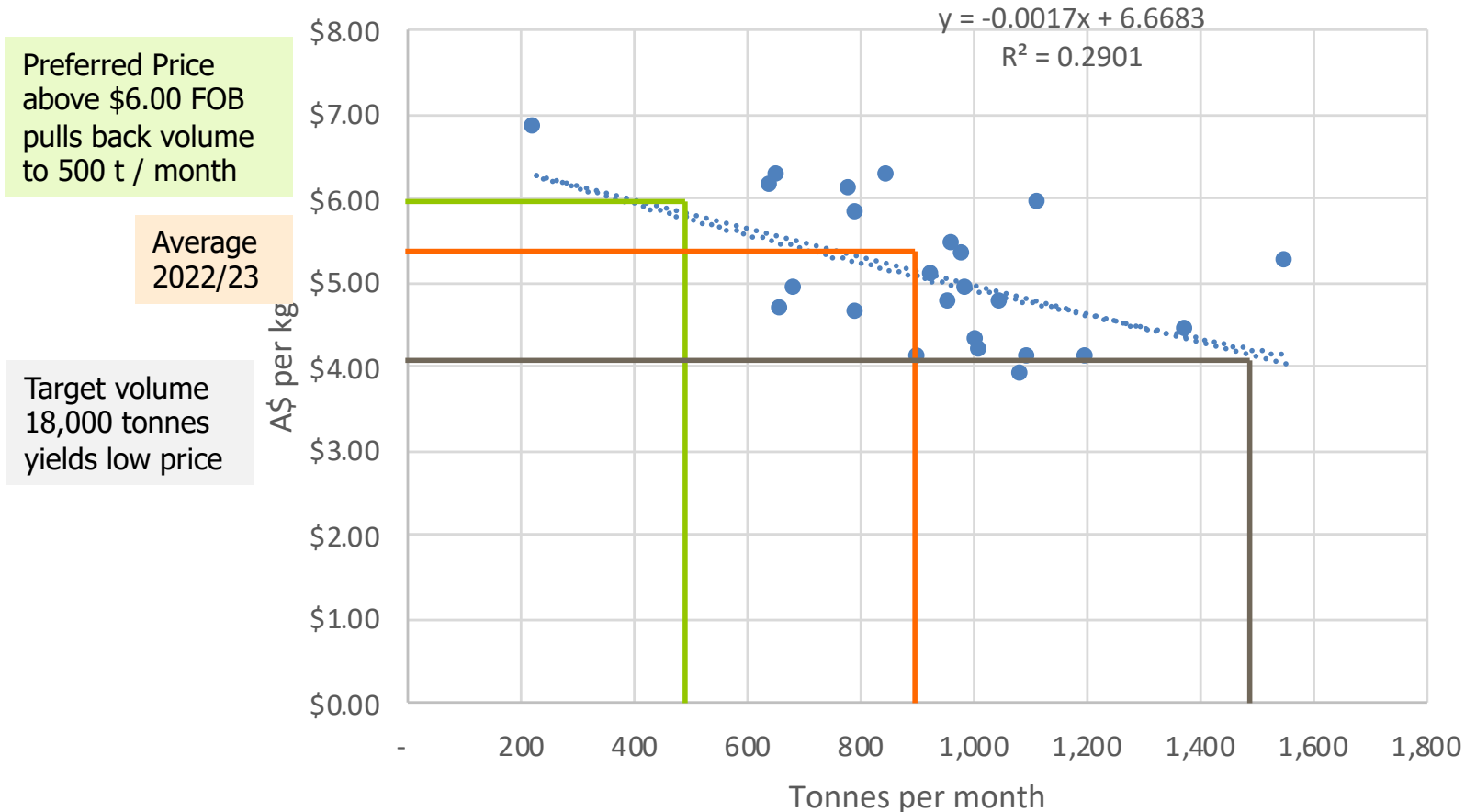
**Avocado Exports by state by month for 24 months**



Source : ABS (2019) via IHS Global Trade Atlas; Fresh Intelligence analysis

# Australian avocado export price volume relationship

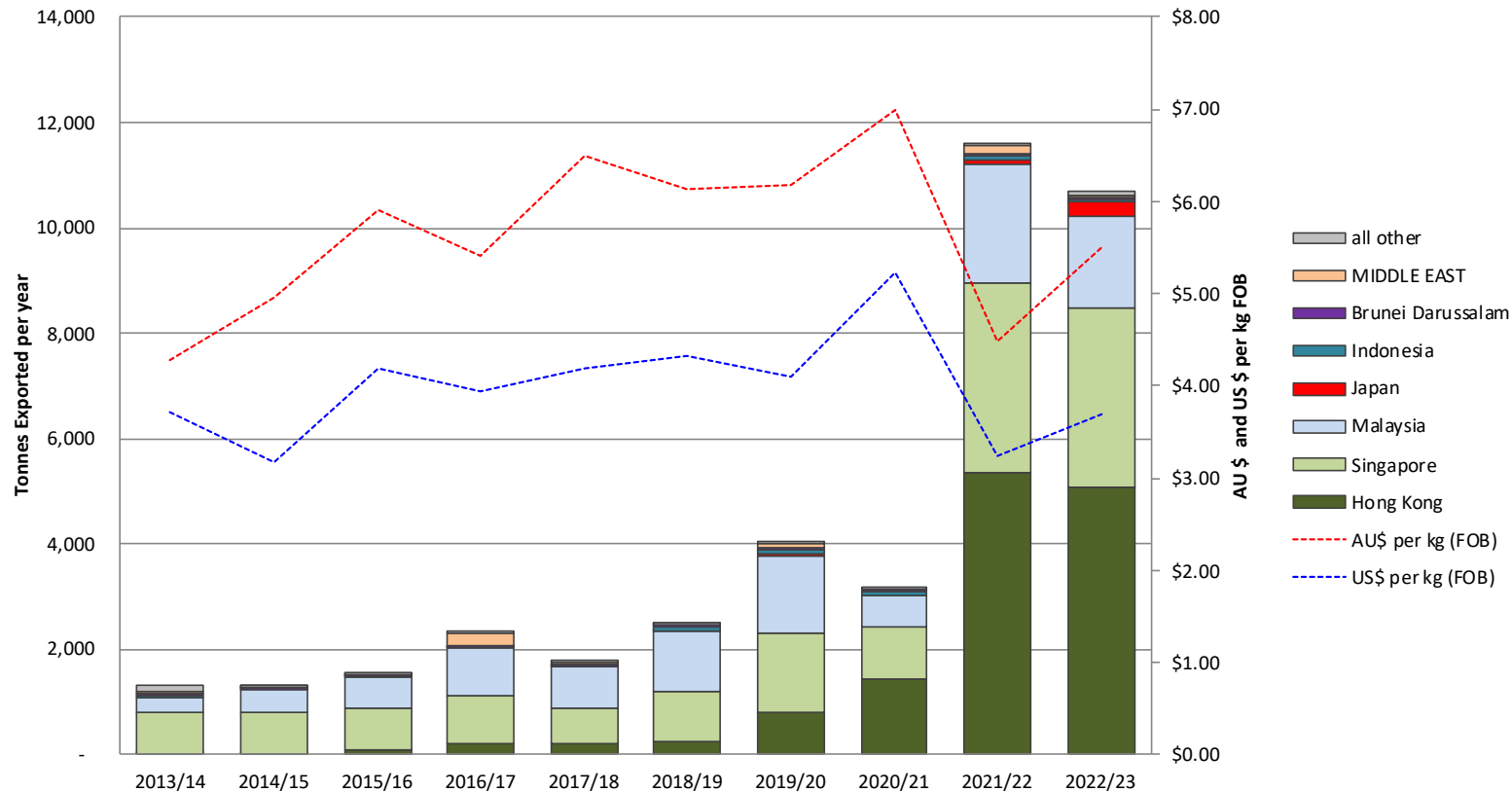
Over 24 months there has been a high correlation between the export prices and volumes. This chart shows that with prices above \$6 per kg volumes were less than 800 tonnes per month. The 10,685 tonnes in the year (average 890 tonnes per month) was achieved with an average price of \$5.51 per kg. The highest volume achieved (1379 tonnes in March 22) was close to the lowest price (\$4.44). To achieve 18,000 tonnes per year export target or 1,500 tonnes per month the unit prices would need to be around \$4.00 per kg FOB without other market interventions.



# Australian avocado exports for 10 years

Australian avocado exports accelerated to record levels in 2022/23 influenced by aggressive pricing to drive market share in key markets. Hong Kong, Singapore and Malaysia contributed to almost all the growth.

**Australian Avocado Exports - Annual Volume by key market  
July 2013 to June 2023**



Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence Analysis

# Australian avocado exports for 10 years

Australian avocado exports have increased 44 per cent per year over 5 years to **10,685 tonnes** in 2022/23, with most of the growth in the last 24 months.

**Singapore, Malaysia and Hong Kong** account for 95.7 per cent of the total trade.

The loss of the **Thailand** market due to the changed import conditions accounted for a loss of at least 500 tonnes per year since 2011/12 though access was gained for Western Australia in 2023. No trade has yet been recorded.

Trade to **Japan** recorded 277 tonnes from Western Australia in 2022/23, the highest level in 5 years since the access was gained.

**Australian Avocado export tonnes by key market per year 2013/14 to 2022/23**

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23		5yr trend	share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes		% CAGR	%
Hong Kong	25	23	87	217	206	254	804	1,425	5,358	5,074		111%	47.5%
Singapore	794	765	792	905	668	965	1,526	996	3,580	3,403		<b>37%</b>	<b>31.8%</b>
Malaysia	268	454	591	899	804	1,147	1,455	616	2,254	1,752		<b>11%</b>	16.4%
Japan	-	-	-	-	-	1	40	-	106	277		<b>300%</b>	2.6%
Indonesia	52	15	25	19	12	62	75	58	65	48		-6%	0.5%
Brunei Darussalam	8	10	17	23	22	23	30	34	48	30		7%	0.3%
MIDDLE EAST	45	9	22	231	53	22	101	13	146	53		24%	0.5%
all other	119	10	12	21	21	24	21	14	54	48		19%	0.5%
World	1,310	1,287	1,546	2,315	1,786	2,497	4,051	3,155	11,611	10,685		44%	100%

Source: ABS via IHS Global Trade Atlas; Fresh Intelligence analysis

CAGR: Compound Annual Growth Rate

*Note: MIDDLE EAST includes UAE, Bahrain, Qatar, Oman, Saudi Arabia, Jordan and Lebanon*

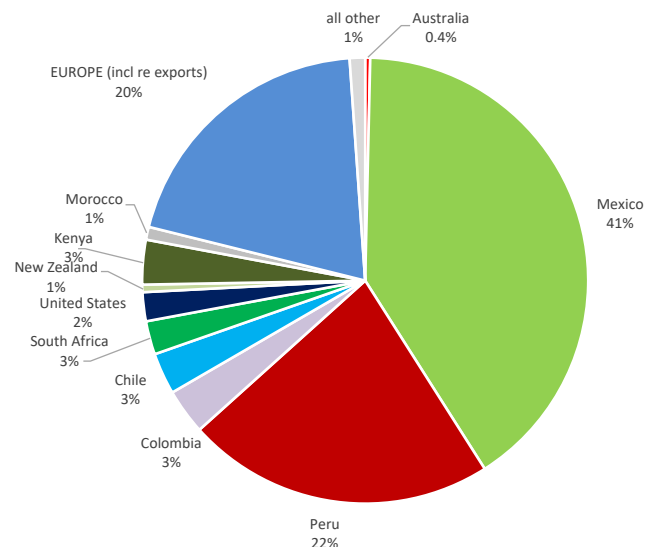
# Global avocado exporters

Globally 2.93 million tonnes of avocados were exported in 2022/23 including 587,000 tonnes from Europe that are mostly re exported volumes from Latin America. The result was 3.2 per cent lower than the previous year.

Mexico is the world’s largest exporter followed by Peru, Chile and Colombia, which combined supply 70 per cent of the world’s avocados.

The United States and Europe are by far the largest import markets while Japan is the largest importer in Asia,

Australia accounts for 0.4 per cent of global trade in avocados



Exporter	Jul - Jun 19	Jul - Jun 20	Jul - Jun 21	Jul - Jun 22	Jul - Jun 23	1yr chg	5yr trend	share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	% to 22	CAGR %	
<b>Australia</b>	<b>2,497</b>	<b>4,051</b>	<b>3,155</b>	<b>11,611</b>	<b>10,685</b>	<b>-8.0%</b>	<b>43.8%</b>	<b>0.4%</b>
Mexico	1,056,267	1,121,363	1,274,676	1,037,175	1,194,067	15.1%	3.1%	40.8%
Peru	371,848	355,958	467,838	536,935	656,778	22.3%	15.3%	22.4%
Colombia	28,487	30,009	44,570	77,075	96,904	25.7%	35.8%	3.3%
Chile	147,019	134,847	74,041	126,775	88,413	-30.3%	-11.9%	3.0%
South Africa	73,798	47,165	52,843	56,950	71,367	25.3%	-0.8%	2.4%
United States	50,926	68,535	59,347	66,940	61,630	-7.9%	4.9%	2.1%
New Zealand	17,493	21,301	28,966	22,062	15,904	-27.9%	-2.4%	0.5%
Kenya	51,507	71,879	63,356	79,081	95,036	20.2%	16.5%	3.2%
Morocco	16,397	16,946	19,362	36,244	27,332	-24.6%	13.6%	0.9%
EUROPE (incl re exports)	431,309	489,488	590,919	628,048	587,917	-6.4%	8.1%	20.1%
all other	158,037	589,556	207,781	358,839	32,869			1.1%
<b>Global Exports</b>	<b>2,403,088</b>	<b>2,947,047</b>	<b>2,883,699</b>	<b>3,026,124</b>	<b>2,928,216</b>	<b>-3.2%</b>	<b>5.1%</b>	<b>100.0%</b>

Source : ITC Comtrade, Fresh Intelligence analysis

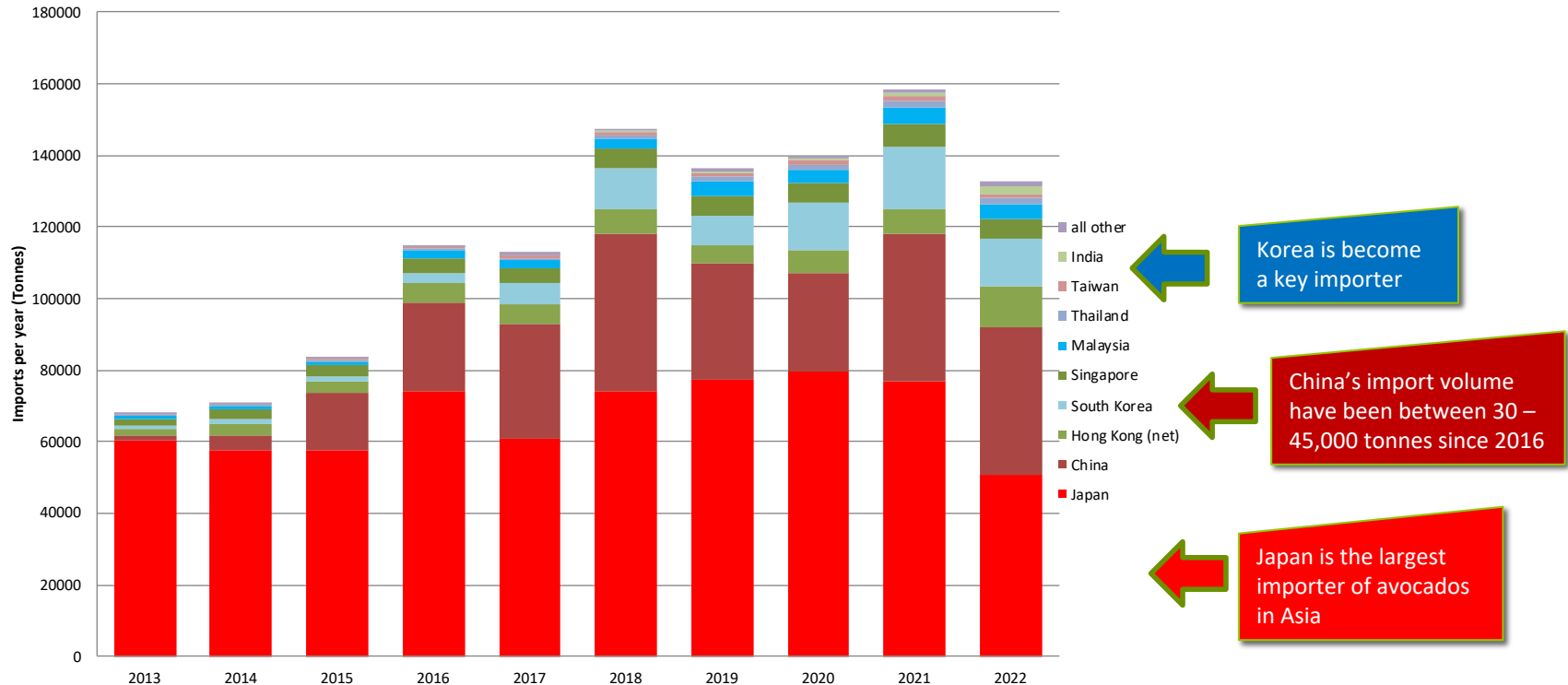
# Asian market imports of avocados

Asian markets imported 132,000 tonnes of avocados in 2022, which was 16 per cent less than the previous year and 3 per cent less per year over 5 years. Japan remained the largest importer in Asia with 38 per cent share, importing mostly from Mexico though declined 34 per cent in 2022 impacted by supply conditions from Mexico.

China had been the growth driver from zero to 44,000 tonnes by 2018 though held at 41,000 in 2022. South Korea has been a key importer lifting 30 per cent to over 17,000 tonnes in 2021 though fell back 22 per cent in 2022 to 13,500 tonnes.

Australia has a significant share of Malaysia and Singapore markets, which combined have a 7 per cent share of all avocado imports by Asian region.

10 year growth of avocados imports by Asian markets 2013 - 2022



Source: ITC Trademap; Fresh Intelligence analysis

# Australian avocado imports

From July to June 2023 there were 12,896 tonnes of avocados imported to Australia worth AU\$54.6 million, which was 2 per cent higher than the previous season. Unit values were 33 per cent higher at A\$4.52 per kg.

		Key Results July 2022 to June 2023			
TOTAL Avocados		Volume	12,896 tonnes	...	2.0%
Imports by Season to date		Value	58.35 million	...	35.5%
		AU\$ per kg	\$4.52	...	32.8%
					1.12

Supplier	Volume Tonnes				Value AU\$ Million				Average AU\$ per KG (CIF)	
	July to Jun-22	July to Jun-23	Change %	Share %	July to Jun-22	July to Jun-23	Change %	Share %	July to Jun-22	July to Jun-23
New Zealand	12,598	12,029	-5%	93%	42.93	54.66	27%	94%	3.41	4.54
Chile	42	868	++	7%	0.15	3.69	++	6%	3.54	4.26
TOTAL (all New Zealand)	12,640	12,896	2%	100%	43.08	58.35	35%	100%	3.41	4.52

source : ABS (2023) via IHS Global Trade Atlas ABS data; Fresh Intelligence analysis

## Australian import pattern of avocados by month from July 2009 to June 2023

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total Fin Year	
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	A\$ per kg (CIF)
2009/10	-	-	665	1,826	2,268	2,626	1,821	1,304	77	14	-	-	10,600	\$4.13
2010/11	-	-	286	1,347	1,982	2,456	1,811	897	95	34	-	-	8,908	\$3.83
2011/12	-	-	1,734	2,747	3,605	3,768	2,532	2,511	317	8	-	-	17,221	\$4.18
2012/13	21	170	696	1,255	1,125	993	830	288	-	-	-	-	5,378	\$3.71
2013/14	-	122	931	2,138	2,956	3,676	3,409	2,206	-	-	-	-	15,439	\$4.11
2014/15	175	742	1,980	3,362	3,296	4,268	3,373	2,265	163	-	-	-	19,624	\$4.84
2015/16	152	589	1,281	2,441	2,053	2,896	2,345	1,351	-	-	-	-	13,108	\$4.38
2016/17	-	807	2,028	2,660	4,622	5,927	4,620	2,625	67	-	-	-	23,355	\$4.86
2017/18	-	108	1,232	2,200	2,562	2,870	1,873	485	-	-	-	-	11,330	\$5.00
2018/19	-	216	1,794	2,730	2,922	3,484	3,046	369	-	-	-	-	14,562	\$6.32
2019/20	-	355	2,115	2,944	2,771	3,422	3,060	1,455	-	-	-	-	16,121	\$5.05
2020/21	-	586	3,023	4,117	4,245	8,202	5,092	2,670	92	-	-	-	28,027	\$4.95
2021/22	-	457	1,805	2,124	2,183	2,354	2,268	1,393	57	-	-	-	12,640	\$3.41
2022/23	-	354	1,276	2,483	3,346	2,803	2,244	390	0	-	-	-	12,896	\$4.52

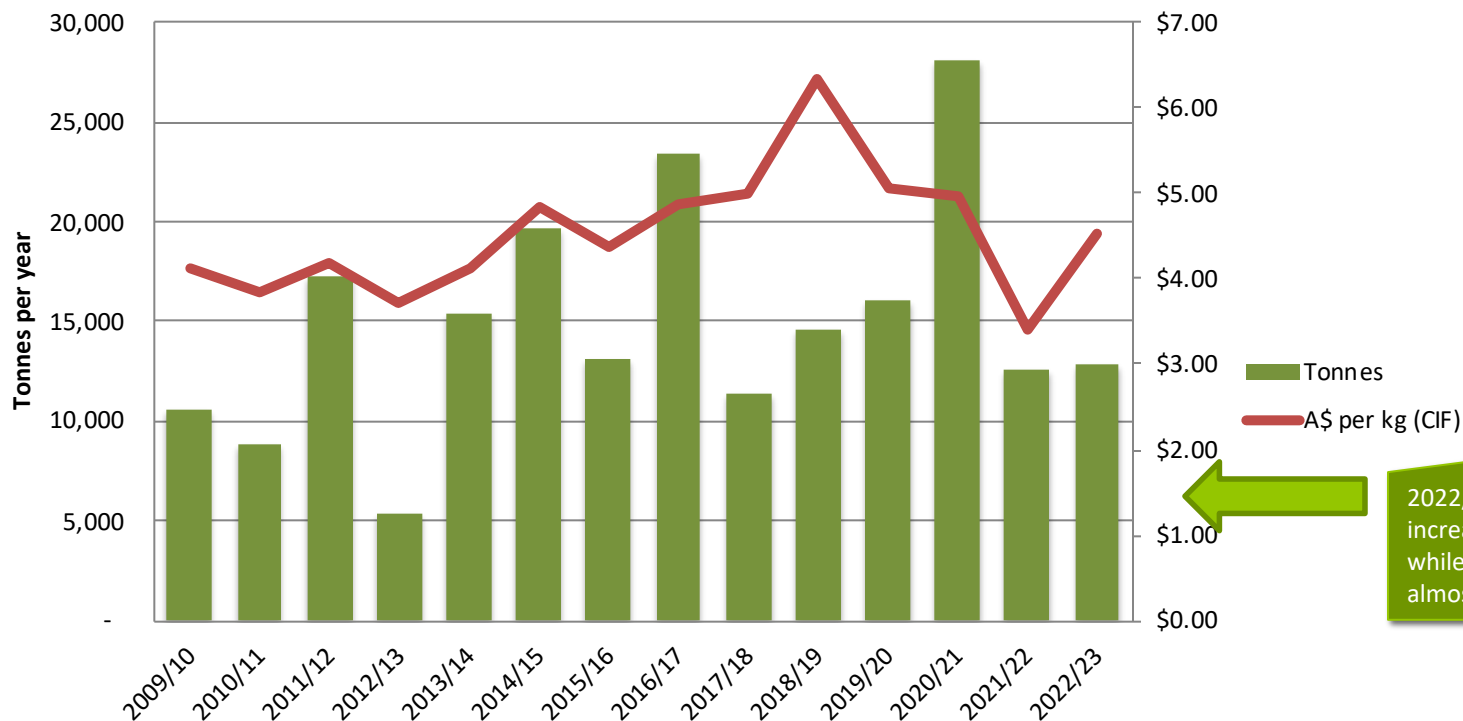
Source : ABS data via IHS Global Trade Atlas; Fresh Intelligence analysis



# Australian avocado imports

Avocado imports are influenced by a bi-annual bearing pattern of “on” and “off” years in New Zealand. In 2022/23 the import season was also influenced by New Zealand easing reliance on Australia for their exports and lifting prices to a level achievable in the market after the losses of the previous year. While volumes remained steady the value increased 35 per cent.

### Avocado Imports 2010 - 2023



Source: ABS (2022) IHS Global Trade Atlas; Fresh Intelligence analysis

# For more information

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