



Market Intelligence Update Australian Avocado Exports Weekly to 11 February 2024

This report was developed for Avocados Australia Ltd from data of the Department of Agriculture Fisheries and Forestry (DAFF) Plant Export Operation for use by the Australian Avocado industry only. This report gives the Australian Avocado industry an insight on previous and current year export performance.

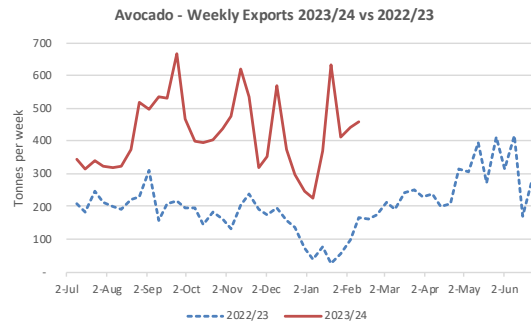
Australian Avocado exports for FY24 to 11 February were 13,503 tonnes which was 149 per cent above the same period in 2022/23. Exports in most recent week 459 tonnes. Hong Kong, Singapore, and Malaysia accounted for 81 per cent of all exports to date in FY24 while others are increasing share. **Japan has recorded 970 tonnes from WA for the 2023/24 season to date. Thailand has recorded 603 tonnes under the new protocol and exceeds the previous highest annual volume recorded in 2011. Over 230 tonnes have been exported to India in the past 8 weeks.** The ABS data for 12 months to Nov 2023 records 15,610 tonnes exported worth A\$73.66m with a unit value of A\$4.72 per kg (Table 3). The unit value in July –Nov was lower at \$4.10. If this was extrapolated to the 2023/24 YTD result the value would be \$55.33m for the period subject to final ABS data.

Table 1 : Avocados exported from Australia by week Exports by Week

| Week No | W/Ending | YTD to week | | 11-Feb | Difference |
|----------------------------|---------------|---------------|---------------|---------------|------------|
| | | 2022/23 | 2023/24 | | |
| | | Tonnes | Tonnes | % | |
| 39 | 1-Oct | 197 | 469 | | |
| 40 | 8-Oct | 196 | 399 | 103% | |
| 41 | 15-Oct | 144 | 394 | 174% | |
| 42 | 22-Oct | 182 | 402 | 120% | |
| 43 | 29-Oct | 163 | 436 | 167% | |
| 44 | 5-Nov | 131 | 477 | 264% | |
| 45 | 12-Nov | 202 | 618 | 206% | |
| 46 | 19-Nov | 238 | 535 | 124% | |
| 47 | 26-Nov | 192 | 318 | 66% | |
| 48 | 3-Dec | 173 | 351 | 103% | |
| 49 | 10-Dec | 195 | 569 | 192% | |
| 50 | 17-Dec | 158 | 374 | 137% | |
| 51 | 24-Dec | 135 | 297 | 119% | |
| 52 | 31-Dec | 72 | 249 | 248% | |
| 1 | 7-Jan | 38 | 225 | 496% | |
| 2 | 14-Jan | 77 | 369 | 380% | |
| 3 | 21-Jan | 26 | 631 | | |
| 4 | 28-Jan | 56 | 414 | | |
| 5 | 4-Feb | 98 | 441 | | |
| 6 | 11-Feb | 167 | 459 | | |
| 7 | 18-Feb | 164 | - | | |
| 8 | 25-Feb | 173 | - | | |
| 9 | 3-Mar | 214 | - | | |
| 10 | 10-Mar | 193 | - | | |
| 11 | 17-Mar | 241 | - | | |
| 12 | 24-Mar | 250 | - | | |
| 13 | 31-Mar | 228 | - | | |
| 14 | 7-Apr | 238 | - | | |
| 15 | 14-Apr | 198 | - | | |
| FYTD | 11-Feb | 5,425 | 13,503 | 148.9% | |
| Moving Annual Total | | 15,610 | | | |

Source: DAFF; Fresh Intelligence analysis

YTD Week ending Sunday, 11 February 2024



| | July to date | 11-Feb |
|---------------|--------------|-------------|
| 2021/22 | | 5,425 |
| 2022/23 | | 13,503 |
| Change | | 149% |

Table 2 : Avocado Exports by Market Year to Date, by latest week and previous 4 weeks

| Market | Last MAT | July to | Market | 11/2/2024 | 4/2/2024 | 28/1/2024 | 21/1/2024 | 14/1/2024 |
|---------------------|---------------|---------------|-------------|------------|------------|------------|------------|------------|
| | November | 11/2/2024 | share | 5 | 4 | 3 | 2 | 1 |
| | | Tonnes | % | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes |
| Hong Kong | 6,929 | 5,509 | 41% | 284 | 162 | 204 | 306 | 162 |
| Singapore | 4,071 | 3,163 | 23% | 71 | 92 | 98 | 124 | 90 |
| Malaysia | 2,922 | 2,290 | 17% | 27 | 40 | 17 | 53 | 22 |
| Japan | 811 | 970 | 7% | - | 36 | 47 | 39 | 6 |
| Thailand | 314 | 603 | 4% | 38 | 29 | 5 | 41 | 39 |
| United Arab E | 243 | 427 | 3% | 4 | 26 | 4 | 23 | 10 |
| India | 9 | 233 | 2% | 32 | 51 | 35 | 40 | 34 |
| Saudi Arabia | 64 | 97 | 1% | - | - | - | 0.5 | - |
| Qatar | 48 | 58 | 0% | 0.9 | 0.8 | - | 1.1 | 1.0 |
| Indonesia | 67 | 35 | 0% | - | 0.9 | - | - | 0.7 |
| Brunei Daruss | 36 | 30 | 0% | 1.0 | 1.1 | 1.1 | 3.0 | - |
| Fiji | 21 | 14 | 0% | - | - | - | - | 0 |
| all other | 96 | - | 0% | 0 | 2 | 3 | 1 | 2 |
| Total Tonnes | 15,610 | 13,515 | 100% | 459 | 441 | 414 | 631 | 366 |

Source: IHS Global Trade Atlas (2023); DAFF, Fresh Intelligence analysis (minor rounding errors may show negatives for low values)

Table 3: Latest ABS Monthly

| | July to | November | change | MAT |
|--------------------|---------|----------|--------|--------|
| Tonnes | 9,491 | 38.89 | 108% | 15,610 |
| Million AUD | | | 62% | 73.66 |
| A\$ per kg | \$4.10 | | -22% | \$4.72 |

Source: ABS via IHS Global Trade Atlas; Fresh Intelligence analysis
MAT = Moving Annual Total
2023/24 est Value \$55.33 m

Table 4: FYTD Export by state*

| States | FYTD (Tonnes) | share |
|--------------|---------------|-------------|
| NSW | 4,133 | 31% |
| QLD | 1,269 | 9% |
| VIC | 1,733 | 13% |
| WA | 5,936 | 44% |
| Other | | 0% |
| Total | 13,503 | 100% |
| AIR | 5,815 | 43% |
| SEA | 7,688 | 57% |

* establishment state of expc

