



Market Intelligence Update Australian Avocado Exports Weekly to 13 August 2023

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 the first 7 weeks of FY24 were 2,256 tonnes which was 45 per cent above the same period in 2022/23. Exports in the latest week were 319 tonnes. Hong Kong, Singapore, and Malaysia accounted for 96 per cent of all exports in FY23 and remain the largest destinations.

The first consignments to Japan from WA for the 2023/24 season were recorded last week.

The ABS data for 12 months to June 2023 records 10,685 tonnes exported worth A\$58.82m with a unit value of A\$5.51 per kg (Table 3). If this was extrapolated to the 2023/24 YTD result the value would be \$12.42m for the first 7 week period subject to final ABS data.

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

| Week No | W/Ending | YTD to week | | Difference |
|----------------------------|---------------|---------------|--------------|--------------|
| | | 2022 | 2023 | |
| | | Tonnes | Tonnes | % |
| 26 | 2-Jul | 313 | 297 | -5% |
| 27 | 9-Jul | 207 | 346 | 68% |
| 28 | 16-Jul | 181 | 314 | 73% |
| 29 | 23-Jul | 247 | 339 | 37% |
| 30 | 30-Jul | 214 | 322 | 50% |
| 31 | 6-Aug | 200 | 318 | 59% |
| 32 | 13-Aug | 192 | 319 | 66% |
| 33 | 20-Aug | 222 | - | |
| 34 | 27-Aug | 231 | - | |
| 35 | 3-Sep | 311 | - | |
| 36 | 10-Sep | 156 | - | |
| 37 | 17-Sep | 207 | - | |
| 38 | 24-Sep | 216 | - | |
| 39 | 1-Oct | 197 | - | |
| 40 | 8-Oct | 196 | - | |
| 41 | 15-Oct | 144 | - | |
| 42 | 22-Oct | 182 | - | |
| 43 | 29-Oct | 163 | - | |
| 44 | 5-Nov | 131 | - | |
| 45 | 12-Nov | 202 | - | |
| 46 | 19-Nov | 238 | - | |
| 47 | 26-Nov | 192 | - | |
| 48 | 3-Dec | 173 | - | |
| 49 | 10-Dec | 195 | - | |
| 50 | 17-Dec | 158 | - | |
| 51 | 24-Dec | 135 | - | |
| 52 | 31-Dec | 72 | - | |
| 1 | 7-Jan | 38 | - | |
| 2 | 14-Jan | 77 | - | |
| FYTD | 13-Aug | 1,555 | 2,256 | 45.1% |
| Moving Annual Total | | 10,685 | | |

Source: DAFF; Fresh Intelligence analysis

YTD Week ending Sunday, 13 August 2023

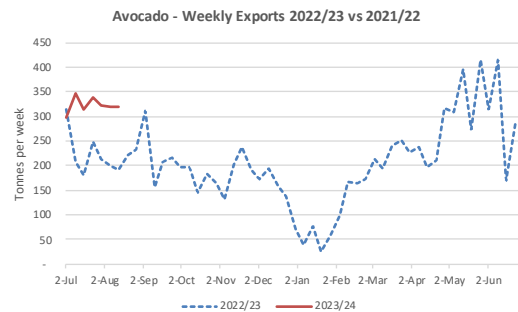


Table 2 : Avocado Exports by Market Year to Date, by latest week and previous 4 weeks

| Market | Last MAT | July to | | 13/8/2023 | | 6/8/2023 | | 30/7/2023 | | 23/7/2023 | | 16/7/2023 | |
|---------------------|---------------|--------------|--------------|------------|------------|------------|------------|------------|--------|-----------|--------|-----------|--------|
| | Jun - May | 13/8/2023 | Market share | 32 | 31 | 30 | 29 | 30 | 29 | 28 | 27 | 26 | 25 |
| | Tonnes | Tonnes | % | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes | Tonnes |
| Hong Kong | 5,074 | 986 | 44% | 137 | 114 | 137 | 166 | 139 | | | | | |
| Singapore | 3,403 | 694 | 31% | 62 | 130 | 104 | 95 | 86 | | | | | |
| Malaysia | 1,752 | 480 | 21% | 66 | 70 | 77 | 69 | 84 | | | | | |
| Japan | 277 | 52 | 2% | 50 | - | 1 | - | 1 | | | | | |
| Indonesia | 48 | 10 | 0% | 0.7 | 0.6 | - | 1.3 | 0.6 | | | | | |
| Brunei Daruss | 30 | 3 | 0% | - | - | - | - | 1.1 | | | | | |
| United Arab E | 22 | - | 0% | - | - | - | - | - | | | | | |
| New Caledoni | 22 | 3 | 0% | - | 1 | 2 | - | - | | | | | |
| Fiji | 18 | 5 | 0% | 1.6 | 1 | 0 | 1 | 1 | | | | | |
| Qatar | 10 | 2 | 0% | - | 1 | - | 1 | - | | | | | |
| India | - | 8 | 0% | - | 1.5 | - | 1.4 | - | | | | | |
| Kuwait | 0 | 5 | 0% | - | 2 | - | 2 | - | | | | | |
| all other | 30 | - | 0% | 1 | (2) | 0 | 2 | 0 | | | | | |
| Total Tonnes | 10,685 | 2,256 | 100% | 319 | 318 | 322 | 339 | 314 | | | | | |

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 June | change | MAT | |
|--------------|--------|-----|--------|
| Tonnes | 10,685 | -8% | 10,685 |
| Million AUD | 58.82 | 13% | 58.82 |
| A\$ per kg | \$5.51 | 23% | \$5.51 |

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

MAT = Moving Annual Total

2023/24 est Value \$12.42 m

Table 4: FYTD Export by state*

| States | FYTD (Tonnes) | share |
|--------------|---------------|-------------|
| NSW | 957 | 42% |
| QLD | 980 | 43% |
| VIC | 87 | 4% |
| WA | 230 | 10% |
| Total | 2,256 | 100% |
| AIR | 1,275 | 57% |
| SEA | 981 | 43% |

* establishment state of expc

