



# Monthly Export / Import Update

## January 2023

### EXPORTS

In the 7 months to Jan 23 exports of avocados recorded **5,421 tonnes** worth A\$29.48m and was **17 per cent** below the same period in 2021/22 (Table 1). The overall value increased by 5 per cent. Unit values were 26.5 per cent higher at AU\$5.44 per kg. The MAT (Moving Annual Total) was 10,527 tonnes, down 4 per cent since the previous month's MAT indicating a downward trend.

**Table 1 : Avocado Key Measures**

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	5,421	-17%	10,527
Value (M AUD)	29.48	5%	53.5
\$ per kg (FOB)	\$5.44	26.5%	\$5.08

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 2,168 tonnes, down 15 per cent followed by Singapore (-9%) and Malaysia (-37%). These markets accounted for 95 per cent of the 2022/23 exports to date.

There were 245 tonnes exported to Japan (+181%) from Western Australia, and small consignments to Indonesia and Pacific markets (Table 3).

**Table 3 : Avocado Exports by Market**  
July to January

Market	2021/22	2022/23	Chg LY	share	MAT
	Tonnes	Tonnes	%	%	Tonnes
Hong Kong	2,556	2,168	-15%	40.0%	4,970
Singapore	2,130	1,944	-9%	35.9%	3,394
Malaysia	1,498	949	-37%	17.5%	1,706
Japan	87	245	181%	4.5%	263
Indonesia	38	15	-61%	0.3%	41
Brunei Darussalam	29	18	-40%	0.3%	36
New Caledonia	25	19	-26%	0.3%	21
Fiji	3	11	242%	0.2%	18
United Arab Emirates	96	9	-91%	0.2%	11
Qatar	6	4	-24%	0.1%	8
Kuwait	26	-	-	0.0%	7
Seychelles	-	-	-	0.0%	6
all other	10	39	-	-	45
<b>Total YTD Tonnes</b>	<b>6,505</b>	<b>5,421</b>	<b>-17%</b>	<b>100%</b>	<b>10,527</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume

++ >500% increase

share of season

MAT - Moving Annual Total

**Table 2. Avocado By State**

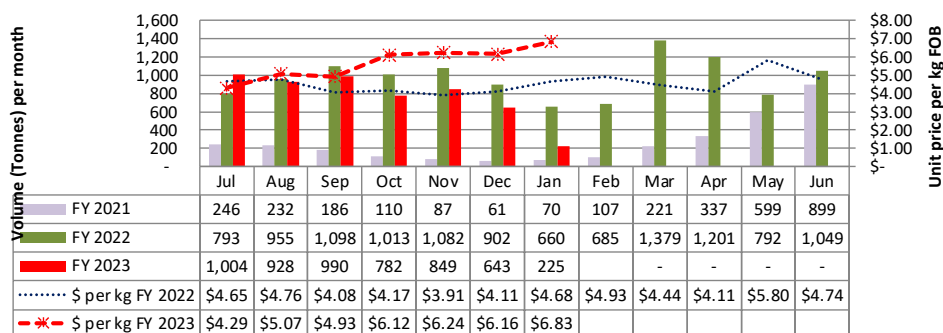
	2021/22	2022/23	Chg LY	share	MAT
	Tonnes	Tonnes	%	%	Tonnes
Queensland	1,793	2,664	49%	49%	6,407
Western Australia	2,158	1,053	-51%	19%	1,548
New South Wales	1,501	1,161	-23%	21%	1,855
Victoria	756	310	-59%	6%	479
South Australia	278	233	-16%	4%	235
Other	19	1	-	0%	-
<b>Total</b>	<b>6,505</b>	<b>5,421</b>	<b>-17%</b>	<b>100%</b>	<b>10,527</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Queensland was the largest export state for the period and 49 per cent higher to 2,664 tonnes. Western Australia was 51 per cent lower to 1,053 tonnes including the 245 tonnes sent to Japan.

On a month to month basis the January exports were 225 tonnes compared to 660 tonnes a year ago and FOB prices were 46 per cent higher at A\$6.83 per kg (Figure 1).

**Figure 1 Avocado Exports per month vs last 2 years**



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Sea freight accounted for 31 per cent of avocado shipments in 7 months to Jan 23 lifting 21 per cent compared to last year.

**Table 4. Avocado By Transport Mode**

	2022/23	change	share	MAT
	Tonnes	%	%	Tonnes
Air	3,766	-27%	69%	8,434
Sea	1,654	21%	31%	2,093
<b>Total</b>	<b>5,421</b>	<b>-17%</b>	<b>100%</b>	<b>10,527</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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### MARKET INSIGHTS

#### Hong Kong (Dec 22)

Hong Kong imported 9,870 tonnes of avocados in **6 months to Dec 22**, which was 45 per cent less than the previous year. More than 60 per cent is re-exported to China. Australia supplied 2,246 tonnes or 5 per cent less. Peru is the largest supplier though was down 41 per cent to 3,374 tonnes where most of this is reexported to China. Chile was 64 per cent lower to 1,262 tonnes.

#### Singapore (Jan 23)

Singapore imported 2,973 tonnes of avocados in **7 months to Jan 23**, 21 per cent less than a year ago. Australia supplied 2,090 tonnes or 16 per cent less than a year ago accounting for 70 per cent market share. New Zealand supplied 48 per cent less or 324 tonnes while Mexico supplied 79 per cent fewer avocados. Australia's recorded CIF prices were A\$8.81 in January rising sharply from A\$7.01 average for the period.

#### Malaysia (Jan 23)

Malaysia has imported 2,143 tonnes of avocados in **7 months to Jan 23**, which was 7.6 per cent less than last year. Australia supplied 1,302 tonnes or 15.3 per cent less than last year and holds 61 per cent market share. Philippines and Mexico are ramping up supplies again from low bases. Australian CIF prices were recorded A\$6.91 average for the period and increased to \$7.24 in January.

Table 5 : Avocado Imports by Hong Kong

Market	Jul to December		share	Value	Year to date	Month of
	FY 2022/23	Chg LY			Unit Value	December
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	2,246	-5.2%	23%	13.5	\$5.99	\$4.39
Peru	3,374	-41.1%	34%	9.7	\$2.86	\$6.70
Mexico	1,794	-28.4%	18%	6.8	\$3.79	\$2.89
Chile	1,262	-64.9%	13%	4.9	\$3.90	\$3.20
Other	1,192		12%	5.0	\$4.18	\$4.06
<b>Total YTD Tonnes</b>	<b>9,870</b>	<b>-45.7%</b>	<b>100%</b>	<b>39.8</b>	<b>\$4.03</b>	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 6 : Avocado Imports by Singapore

Market	Jul to January		share	Value	Year to date	Month of
	FY 2022/23	Chg LY			Unit Value	January
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	2,090	-16.0%	70%	14.6	\$7.01	\$8.81
New Zealand	324	-48.1%	11%	1.6	\$4.84	
Kenya	167	24.6%	6%	0.4	\$2.59	\$4.25
United States	73	69.8%	2%	0.8	\$10.96	\$7.74
Mexico	64	-78.9%	2%	1.1	\$16.43	\$7.46
Other	255		9%	1.4		
<b>Total YTD Tonnes</b>	<b>2,973</b>	<b>-20.9%</b>	<b>100%</b>	<b>19.9</b>	<b>\$6.68</b>	<b>\$7.19</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 7 : Avocado Imports by Malaysia

Market	Jul to January		share	Value	Year to date	Month of
	2022	Chg LY			Unit Value	January
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	1,302	-15.3%	61%	9.0	\$6.91	\$7.24
Kenya	186	-5.8%	9%	0.6	\$3.05	\$2.65
Philippines	196	163.0%	9%	0.6	\$2.81	\$2.81
Mexico	118	282.8%	6%	0.6	\$4.67	\$5.34
New Zealand	110	-61.7%	5%	0.5	\$4.92	
Other	231		11%	0.5	\$1.96	
<b>Total YTD Tonnes</b>	<b>2,143</b>	<b>-7.6%</b>	<b>100%</b>	<b>11.7</b>	<b>\$5.44</b>	<b>\$5.80</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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### Japan (Jan 23)

Japan imported 34,014 tonnes of avocados in **7 months to January 23** and is 18 per cent **lower** than last year. Australia supplied 293 tonnes. Mexico, the lead supplier, was 24 per cent lower while Peru decreased 1.7 per cent to 8,274 tonnes for the period.

Australia's recorded average CIF price was A\$4.77 compared to average A\$3.82 from all sources. The price from Mexico has fallen.

Market	Jul to January		share	Value A\$ Mill	Year to date		Month of January
	2022 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	Unit Value A\$ per kg CIF	
Australia	293	237.6%	1%	1.4	\$4.77	\$4.56	
Mexico	25,046	-24.2%	74%	95.0	\$3.79	\$3.40	
Peru	8,274	-1.7%	24%	32.1	\$3.88		
New Zealand	160	19.8%	0%	0.7	\$4.28	\$9.26	
Colombia	204	463.2%	1%	0.7	\$3.20		
Other	38		0%	0.9			
<b>Total YTD Tonnes</b>	<b>34,014</b>	<b>-18.6%</b>	<b>100%</b>	<b>130.1</b>	<b>\$3.82</b>	<b>\$3.42</b>	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

### IMPORTS

The imports until January 2023, essentially the 2022/23 import season arrived mostly from New Zealand. Imports of avocados were **12,506** tonnes worth A\$56.32m or 12 per cent more than last year (Table 9). Unit values increased 33 per cent to A\$4.50 and has meant the overall value increased by 48 per cent for the period. The MAT (Moving Annual Total) was 13,955 tonnes easing 0.2 per cent in the month showing that import momentum steady.

Table 9 : Import Key Measures

IMPORTS	TD (from July	Chg LY	MAT
Volume (tonnes)	12,506	12%	13,955
Value (M AUD)	56.32	48%	61.3
\$ per kg	\$4.50	32.7%	\$4.39

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 10 : Avocado Imports by Market

Market	July to January		Value A\$ Mill	Unit Value A\$ per kg
	2022/23 Tonnes	Chg LY %		
New Zealand	11,638	4%	52.6	\$4.52
Chile	868		3.7	\$4.26
<b>Total YTD Tonnes</b>	<b>12,506</b>	<b>12%</b>	<b>56.3</b>	<b>\$4.50</b>

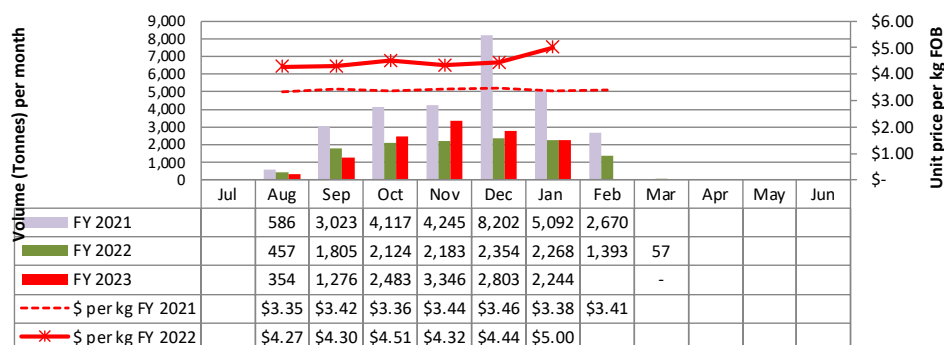
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by YTD volume ++ new access

868 tonnes were recorded imported from Chile. Chile recorded shipments of 844 tonnes to Australia departing since October destined to Sydney and Melbourne which have mostly arrived.

January imports recorded 2,244 tonnes, similar to 2,268 tonnes for the same month last year (Figure 2), and considerably less than the 5,092 tonnes recorded in January 2021 when Australia had a supply shortage.

Figure 2 Avocado Imports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis