



Monthly Export / Import Update

March 2023

EXPORTS

In the 9 months to Mar 23 exports of avocados recorded **7,052** tonnes worth A\$38.90m and was **18 per cent** below the same period in 2022/23 (Table 1). The overall value increased by 4 per cent. Unit values were 26.1 per cent higher at AU\$5.52 per kg. The MAT (Moving Annual Total) was 10,094 tonnes, down 3.8 per cent since the previous month's MAT indicating a slight easing of trends.

Table 1 : Avocado Key Measures

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	7,052	-18%	10,094
Value (M AUD)	38.90	4%	53.4
\$ per kg (FOB)	\$5.52	26.1%	\$5.29

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 3,011 tonnes, down 15 per cent followed by Singapore (-12%) and Malaysia (-36%). These markets accounted for 95 per cent of the 2022/23 exports to date.

There were 277 tonnes exported to Japan (+208%) from Western Australia, and small consignments to Indonesia and Pacific markets (Table 3).

Table 3 : Avocado Exports by Market
July to March

Market	2021/22	2022/23	Chg LY	share	MAT
	Tonnes	Tonnes	%	%	Tonnes
Hong Kong	3,532	3,011	-15%	42.7%	4,837
Singapore	2,773	2,436	-12%	34.5%	3,243
Malaysia	1,910	1,229	-36%	17.4%	1,573
Japan	90	277	208%	3.9%	293
Indonesia	48	19	-59%	0.3%	36
Brunei Darussalam	35	24	-33%	0.3%	36
New Caledonia	25	19	-26%	0.3%	21
Fiji	4	12	220%	0.2%	19
United Arab Emirates	98	9	-91%	0.1%	9
Qatar	9	5	-44%	0.1%	5
Kuwait	33	0		0.0%	0
Seychelles	-	-		0.0%	6
all other	13	11			15
Total YTD Tonnes	8,570	7,052	-18%	100%	10,094

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume

++ >500% increase

share of season

69.9%

MAT - Moving Annual Total

Table 2. Avocado By State

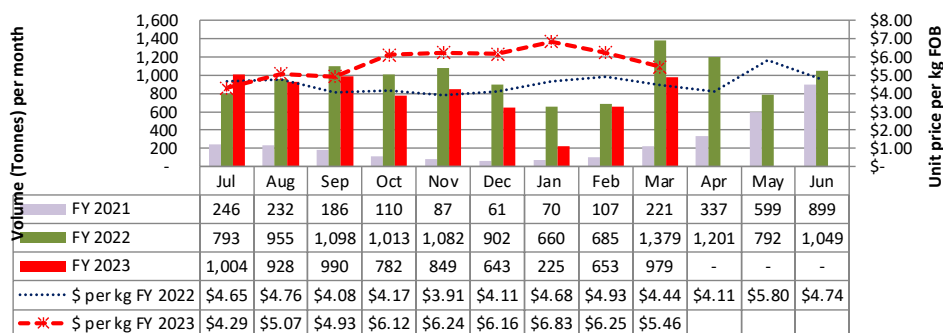
	July to March		Chg LY	share	MAT
	2021/22	2022/23			
	Tonnes	Tonnes	%	%	Tonnes
Queensland	3,139	3,934	25%	56%	6,331
Western Australia	2,574	1,185	-54%	17%	1,264
New South Wales	1,728	1,267	-27%	18%	1,735
Victoria	830	415	-50%	6%	511
South Australia	279	249	-11%	4%	250
Other	20	2		0%	1
Total	8,570	7,052	-18%	100%	10,094

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Queensland was the largest export state for the period and 25 per cent higher to 3,934 tonnes. Western Australia was 54 per cent lower to 1,185 tonnes including the 277 tonnes sent to Japan.

On a month to month basis the March exports were 29 per cent lower at 979 tonnes compared to 1,379 tonnes a year ago and FOB prices were 23 per cent higher at A\$5.46 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 24 per cent of avocado shipments in 9 months to Mar 23 lifting 9 per cent compared to last year.

Table 4. Avocado By Transport Mode

	July to March		change	share	MAT
	2022/23	2021/22			
	Tonnes	Tonnes	%	%	Tonnes
Air	5,350	1,721	-23%	76%	8,175
Sea	1,721	1,721	9%	24%	1,938
Total	7,052	7,052	-18%	100%	10,094

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 (Feb 23)

Singapore imported 3,904 tonnes of avocados in **9 months to Mar 23**, 17.3 per cent less than a year ago. Australia supplied 2,601 tonnes or 18.2 per cent less than a year ago accounting for 67 per cent market share. New Zealand supplied 57 per cent less or 324 tonnes while Mexico supplied 22 per cent fewer avocados. Australia's recorded CIF prices were A\$6.70 in March rising from A\$6.32 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. (No later updates)

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
Total YTD Tonnes	9,870	-45.7%	100%	39.8	\$4.03	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 6 : Avocado Imports by Singapore

Market	Jul to March		share	Value	Year to date	Month of
	FY 2022/23	Chg LY			Unit Value	March
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	2,601	-18.2%	67%	16.4	\$6.32	\$6.70
New Zealand	324	-57.0%	8%	1.6	\$4.84	
Kenya	231	23.5%	6%	0.7	\$2.87	\$3.77
United States	163	81.1%	4%	1.1	\$6.60	\$6.72
Mexico	236	-22.1%	6%	1.6	\$6.69	\$6.42
Other	349		9%	1.6		
Total YTD Tonnes	3,904	-17.3%	100%	22.9	\$5.87	\$6.27

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	
Total YTD Tonnes	2,143	-7.6%	100%	11.7	\$5.44	\$5.80

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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Japan (Mar 23)

Japan imported 39,801 tonnes of avocados in **9 months to March 23** and is 13.5 per cent **lower** than last year. Australia supplied 293 tonnes. Mexico, the lead supplier, was 17.5 per cent lower although has gained in the last 2 months. Australia's recorded average CIF price was A\$4.77 compared to average A\$3.82 from all sources. The price from Mexico is falling.

Table 8 : Avocado Imports by Japan

Market	Jul to March		share	Value A\$ Mill	Year to date	Month of
	2022 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	March A\$ per kg CIF
Australia	293	227.1%	1%	1.4	\$4.77	
Mexico	30,766	-17.5%	77%	116.0	\$3.77	\$3.68
Peru	8,274	-1.7%	21%	32.1	\$3.88	
New Zealand	160	-2.1%	0%	0.7	\$4.28	
United States	19	-59.1%	0%	0.1	\$7.37	
Other	289		1%	1.0		
Total YTD Tonnes	39,801	-13.5%	100%	151.3	\$3.80	\$3.66

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

India (Feb 23)

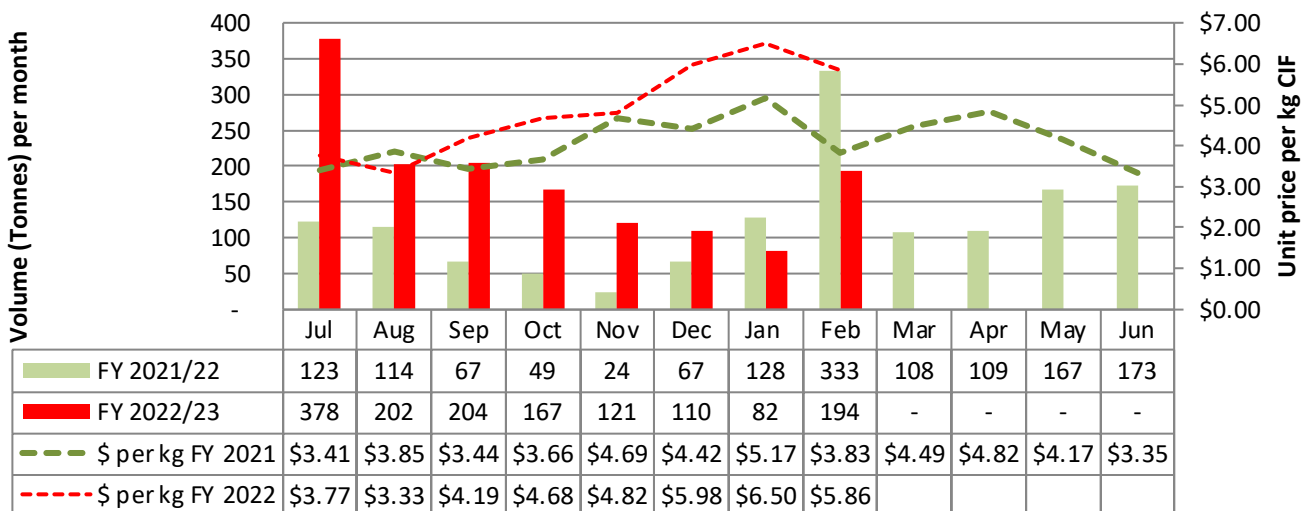
India imported 1,458 tonnes of avocados in **8 months to February 23** and is 61 per cent **above** last year. Tanzania supplied 868 tonnes is its first year of access and now leads the trade with 60 per cent share. Netherlands (ex Peru) is 20 per cent lower and New Zealand is 32 per cent lower with 271 tonnes. Peru has no measurable trade after directly supplying 185 tonnes last year.

Table 9 : Avocado Imports by India

Market	Jul to December		share	Value A\$ Mill	Year to date	Month of
	2022 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	December A\$ per kg CIF
Tanzania	868	++	60%	3.6	\$4.13	\$5.86
Netherlands	250	-19.8%	17%	1.3	\$5.15	\$5.76
New Zealand	271	-32.1%	19%	1.6	\$6.00	\$5.38
Peru	2	-98.9%	0%	0.0		\$7.08
Uganda	1		0%	0.0	\$3.21	
Other	66		5%	0.1		
Total YTD Tonnes	1,458	60.9%	100%	6.6	\$4.56	\$5.86

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

India Avocado Imports





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IMPORTS

The imports for the 2022/23 import season arrived mostly from New Zealand. Imports of avocados were **12,896** tonnes worth A\$54.7m or 2 per cent more than last year (Table 9). Unit values increased 33 per cent to A\$4.52 and has meant the overall value increased by 36 per cent for the period. The MAT (Moving Annual Total) was 12,896 tonnes easing 0.4 per cent in the month.

Table 9 : Import Key Measures

IMPORTS	YTD (from July	Chg LY	MAT
Volume (tonnes)	12,896	2%	12,953
Value (M AUD)	58.35	36%	58.5
\$ per kg	\$4.52	33.4%	\$4.52

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 10 : Avocado Imports by Market
July to February

Market	2022/23	Chg LY	Value	Unit Value
	Tonnes	%	A\$ Mill	A\$ per kg
New Zealand	12,029	-4%	54.7	\$4.54
Chile	868		3.7	\$4.26
Total YTD Tonnes	12,896	2%	58.3	\$4.52

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

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.

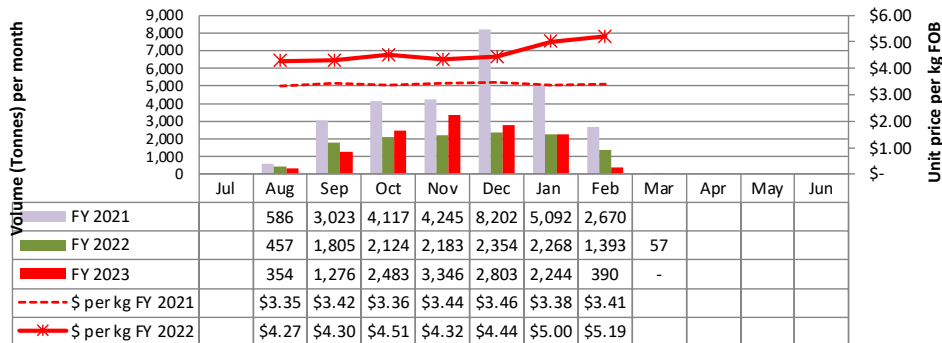
February imports recorded 390 tonnes, pulling up early compared to 1,393 tonnes for the same month last year (Figure 2), and considerably less than the 2,670 tonnes recorded in February 2021 when Australia had a supply shortage.



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Figure 2 Avocado Imports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

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