



# Monthly Export / Import Update

## April 2023

### EXPORTS

In the 10 months to Mar 23 exports of avocados recorded **8,026** tonnes worth A\$44.10m and was **18 per cent** below the same period in 2021/22 (Table 1). The overall value increased by 4 per cent. Unit values were 26.6 per cent higher at AU\$5.44 per kg. The MAT (Moving Annual Total) was 9,866 tonnes, down 2.1 per cent since the previous month's MAT indicating a continued easing of trends.

**Table 1 : Avocado Key Measures**

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	8,026	-18%	9,866
Value (M AUD)	44.10	4%	53.7
\$ per kg (FOB)	\$5.49	26.6%	\$5.44

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 3,566 tonnes, down 17 per cent followed by Singapore (-10%) and Malaysia (-34%). These markets accounted for 96 per cent of the 2022/23 exports to date.

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

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

Market	2021/22		2022/23		Chg LY	share	MAT
	Tonnes	Tonnes	Tonnes	Tonnes			
Hong Kong	4,315	3,566	-17%	44.4%	4,609		
Singapore	3,045	2,732	-10%	34.0%	3,267		
Malaysia	2,042	1,346	-34%	16.8%	1,558		
Japan	90	277	208%	3.4%	293		
Brunei Darussalam	40	26	-36%	0.3%	34		
New Caledonia	25	20	-20%	0.3%	23		
Indonesia	51	20	-61%	0.2%	34		
Fiji	5	13	143%	0.2%	18		
United Arab Emirates	98	9	-91%	0.1%	9		
Qatar	9	5	-41%	0.1%	6		
Saudi Arabia	2	5		0.1%	6		
Lebanon	-	4		0.1%	4		
all other	48	3			7		
<b>Total YTD Tonnes</b>	<b>9,770</b>	<b>8,026</b>	<b>-18%</b>	<b>100%</b>	<b>9,866</b>		

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume

++ >500% increase

share of season

81.3%

MAT - Moving Annual Total

**Table 2. Avocado By State**

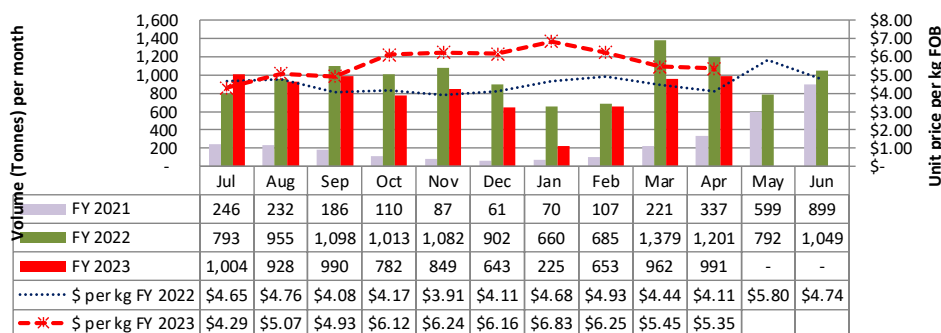
	2021/22		2022/23		Chg LY	share	MAT
	Tonnes	Tonnes	Tonnes	Tonnes			
Queensland	4,065	4,791	18%	60%	6,262		
New South Wales	1,913	1,321	-31%	16%	1,603		
Western Australia	2,622	1,208	-54%	15%	1,239		
Victoria	871	441	-49%	6%	496		
South Australia	279	262	-6%	3%	264		
Other	20	2		0%	1		
<b>Total</b>	<b>9,770</b>	<b>8,026</b>	<b>-18%</b>	<b>100%</b>	<b>9,866</b>		

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Queensland was the largest export state for the period and 18 per cent higher to 4,791 tonnes. Western Australia was 54 per cent lower to 1,208 tonnes including the 277 tonnes sent to Japan (Table 2).

On a month to month basis the April exports were 17 per cent lower at 991 tonnes compared to 1,201 tonnes a year ago and FOB prices were 30 per cent higher at A\$5.35 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 22 per cent of avocado shipments in 10 months to Apr 23 lifting 7 per cent compared to last year.

**Table 4. Avocado By Transport Mode**

	2022/23		change	share	MAT
	Tonnes	Tonnes			
Air	6,253	7,955	-23%	78%	7,955
Sea	1,773	1,911	7%	22%	1,911
<b>Total</b>	<b>8,026</b>	<b>9,866</b>	<b>-18%</b>	<b>100%</b>	<b>9,866</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 (Apr 23)

Singapore imported 4,394 tonnes of avocados in **10 months to Apr 23**, 16.5 per cent less than a year ago. Australia supplied 2,902 tonnes or 18.7 per cent less than a year ago accounting for 66 per cent market share. New Zealand supplied 57 per cent less or 324 tonnes while United States lifted 62 per cent to 187 tonnes. Australia's recorded CIF prices were A\$6.39 in April rising from A\$6.33 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
<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 April		share	Value	Year to date		Month of
	FY 2022/23	Chg LY			Unit Value	April	
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF		A\$ per kg CIF
Australia	2,902	-18.7%	66%	18.4	\$6.33		\$6.39
New Zealand	324	-57.0%	7%	1.6	\$4.84		
Kenya	329	14.2%	7%	1.0	\$2.94		\$3.09
United States	187	62.6%	4%	1.3	\$6.77		\$7.96
Mexico	262	-13.5%	6%	1.8	\$6.82		\$8.06
Other	390		9%	1.7			
<b>Total YTD Tonnes</b>	<b>4,394</b>	<b>-16.5%</b>	<b>100%</b>	<b>25.7</b>	<b>\$5.84</b>		<b>\$5.67</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 (Apr 23)

Japan imported 45,314 tonnes of avocados in **10 months to April 23** and is 10 per cent **lower** than last year. Australia supplied 293 tonnes. Mexico, the lead supplier, was 13.3 per cent lower although has gained in the last 3 months. Australia's recorded average CIF price was A\$4.77 compared to average A\$3.83 from all sources. The price from Mexico lifted above A\$4.00.

Table 8 : Avocado Imports by Japan

Market	Jul to		share	Value	Year to date		Month of
	FY 2022/23	Chg LY			Unit Value	April	
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF	
Australia	293	227.1%	1%	1.4	\$4.77		
Mexico	36,072	-13.3%	80%	137.7	\$3.82	\$4.09	
Peru	8,480	0.8%	19%	32.9	\$3.88	\$3.76	
New Zealand	160	-2.1%	0%	0.7	\$4.28		
United States	20	-58.9%	0%	0.1	\$7.48	\$11.10	
Other	289		1%	1.0			
<b>Total YTD Tonnes</b>	<b>45,314</b>	<b>-10.0%</b>	<b>100%</b>	<b>173.8</b>	<b>\$3.83</b>	<b>\$4.08</b>	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

### India (Mar 23)

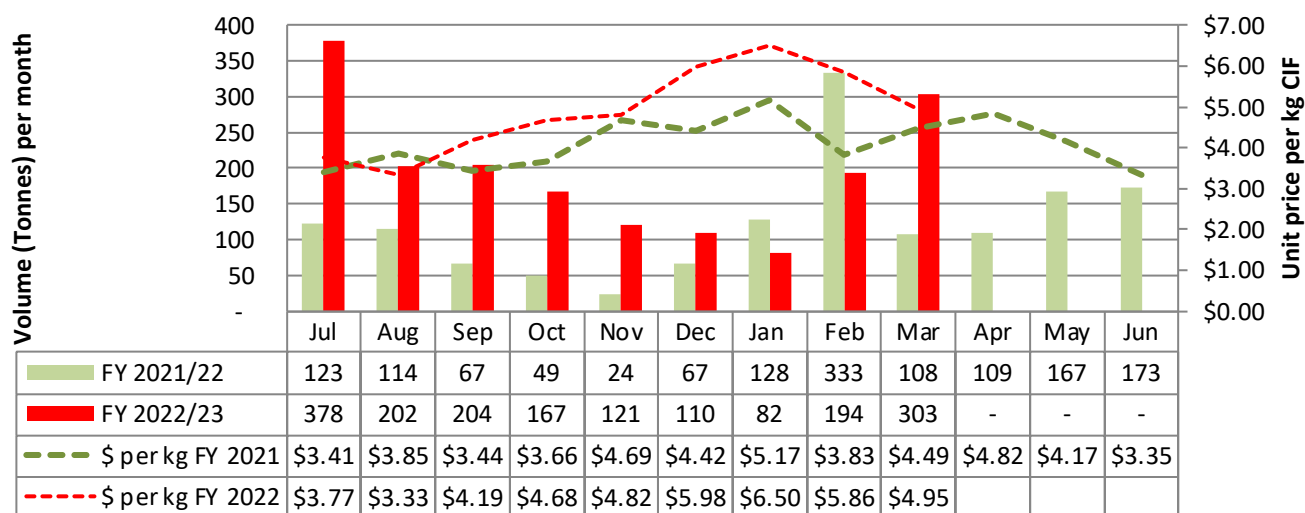
India imported 1,761 tonnes of avocados in **9 months to March 23** and is 36 per cent **above** last year. Tanzania supplied 1,130 tonnes is its first year of access and now leads the trade with 64 per cent share. Netherlands (ex Peru) is 40 per cent lower and Peru is 94 per cent lower with just 11 tonnes.

Table 9 : Avocado Imports by India

Market	Jul to		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	
Tanzania	1,130	++	64%	4.8	\$4.28	\$4.95	
New Zealand	277	-34.5%	16%	1.7	\$6.07	\$4.77	
Netherlands	276	-40.5%	16%	1.4	\$5.25	\$8.72	
Peru	11	-94.6%	1%	0.0		\$6.17	
Kenya	28		2%	0.1	\$2.30		
Other	40		2%	0.1			
<b>Total YTD Tonnes</b>	<b>1,761</b>	<b>36.4%</b>	<b>100%</b>	<b>8.1</b>	<b>\$4.63</b>	<b>\$4.95</b>	

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 10 : Import Key Measures**

IMPORTS	TD (from July	Chg LY	MAT
Volume (tonnes)	12,896	2%	12,896
Value (M AUD)	58.35	35%	58.4
\$ per kg	\$4.52	28.7%	\$4.52

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

**Table 11 : Avocado Imports by Market  
July to April**

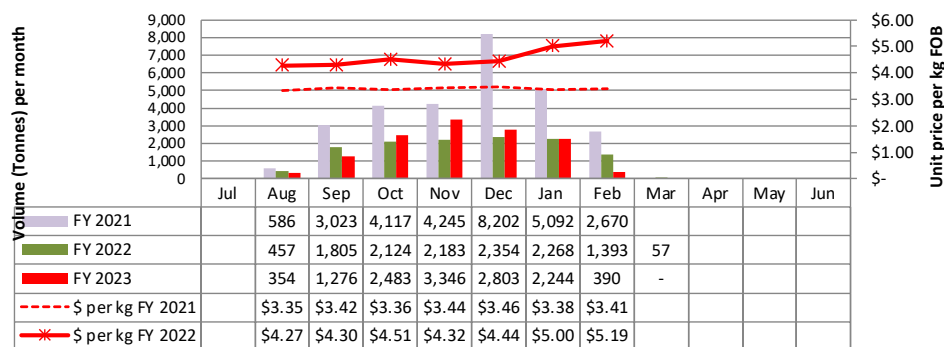
Market	2022/23	Chg LY	Value	Unit Value
	Tonnes	%	A\$ Mill	A\$ per kg
New Zealand	12,029	-5%	54.7	\$4.54
Chile	868		3.7	\$4.26
<b>Total YTD Tonnes</b>	<b>12,896</b>	<b>2%</b>	<b>58.4</b>	<b>\$4.52</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

868 tonnes were recorded imported from Chile.

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.

**Figure 2 Avocado Imports per month vs last 2 years**



Source: IHS Global Trade Atlas; Fresh Intelligence analysis