



Monthly Export / Import Update

June 2023

EXPORTS

In the 12 months to June 23 exports of avocados recorded **10,685** tonnes worth A\$58.82m and was **8 per cent** below the 2021/22 season (Table 1). The overall value increased by 13 per cent. Unit values were 23 per cent higher at AU\$5.51 per kg. The MAT (Moving Annual Total) also 10,685 tonnes, up .6 per cent since the previous month's MAT maintain the momentum.

Table 1 : Avocado Key Measures

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	10,685	-8%	10,685
Value (M AUD)	58.82	13%	58.8
\$ per kg (FOB)	\$5.51	23.0%	\$5.51

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 5,074 tonnes, down 5 per cent followed by Singapore (-5%) and Malaysia (-22%). These markets accounted for 96 per cent of the 2022/23 exports to date.

There were 277 tonnes exported to Japan (+161%) from Western Australia prior to December, and small consignments to Indonesia and Pacific markets (Table 3).

Table 3 : Avocado Exports by Market July to June

Market	2021/22		2022/23		Chg LY	share	MAT
	Tonnes	Tonnes	Tonnes	Tonnes			
Hong Kong	5,358	5,074	-5%	47.5%	5,074		
Singapore	3,580	3,403	-5%	31.8%	3,403		
Malaysia	2,254	1,752	-22%	16.4%	1,752		
Japan	106	277	161%	2.6%	277		
Indonesia	65	48	-25%	0.5%	48		
Brunei Darussalam	48	30	-37%	0.3%	30		
United Arab Emirates	98	22	-78%	0.2%	22		
New Caledonia	28	22	-22%	0.2%	22		
Fiji	10	18	75%	0.2%	18		
Saudi Arabia	3	16	381%	0.2%	16		
Qatar	9	10		0.1%	10		
India	-	6		0.1%	6		
all other	52	7			7		
Total YTD Tonnes	11,611	10,685	-8%	100%	10,685		

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume

++ >500% increase

share of season 100.0%

MAT - Moving Annual Total

Table 2. Avocado By State

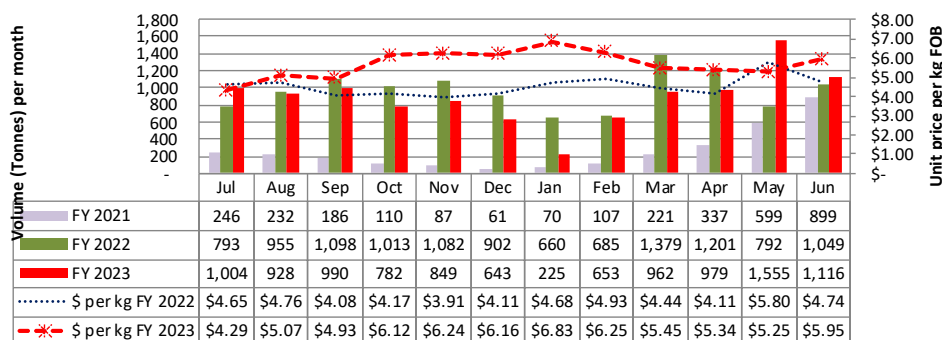
	2021/22		2022/23		Chg LY	share	MAT
	Tonnes	Tonnes	Tonnes	Tonnes			
Queensland	5,537	7,217	30%	68%	7,217		
New South Wales	2,195	1,527	-30%	14%	1,527		
Western Australia	2,653	1,210	-54%	11%	1,210		
Victoria	926	461	-50%	4%	461		
South Australia	280	267	-5%	2%	267		
Other	20	2		0%	2		
Total	11,611	10,685	-8%	100%	10,685		

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Queensland was the largest export state for the period and 30 per cent higher to 7,217 tonnes. Western Australia was 54 per cent lower to 1,210 tonnes including the 277 tonnes sent to Japan (Table 2).

On a month to month basis the June exports were 6 per cent higher at 1,116 tonnes compared to 1,049 tonnes a year ago and FOB prices were 25 per cent lower at A\$5.95 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 25 per cent of avocado shipments in 12 months to June 23 lifting 49 per cent in the year.

Table 4. Avocado By Transport Mode

	2022/23		change	share	MAT
	Tonnes	%			
Air	8,002	-18%	75%	8,002	
Sea	2,683	49%	25%	2,683	
Total	10,685	-8%	100%	10,685	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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MARKET INSIGHTS

Hong Kong (June 23)

Hong Kong imported 22,285 tonnes of avocados in **12 months to June 23**, which was 17 per cent less than the previous year. More than 60 per cent is re-exported to China. Australia supplied 4,919 tonnes or 9.4 per cent more. Peru is the largest supplier and was up 3.2 per cent to 9,501 tonnes where most of this is reexported to China. Mexico was 8.7 per cent higher to 3,410 tonnes.

Singapore (June 23)

Singapore imported 5,328 tonnes of avocados in **12 months to June 23**, 1.2 per cent more than last year. Australia supplied 3,561 tonnes or 0.2 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 United States lifted 139 per cent to 275 tonnes. Australia's recorded CIF prices were A\$5.59 in June compared to A\$6.16 average for the year.

Malaysia (May 23)

Malaysia has imported 3,751 tonnes of avocados in **11 months to May 23**, which was 7.2 per cent less than last year. Australia supplied 2,118 tonnes or 19.9 per cent less than last year and holds 56 per cent market share. United States, Mexico and Philippines are ramping up supplies again from low bases. Australian CIF prices were recorded A\$6.75 average for the year and dropped to \$5.90 in May (No later updates).

Table 5 : Avocado Imports by Hong Kong

Market	Jul to June		share	Value	Year to date	Month of
	FY 2022/23	Chg LY			Unit Value	June
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	4,919	9.4%	22%	29.2	\$5.93	\$4.39
Peru	9,501	3.2%	43%	28.1	\$2.95	\$6.70
Mexico	3,410	8.7%	15%	12.5	\$3.67	\$2.89
Chile	1,917	-62.5%	9%	8.3	\$4.33	\$3.20
Other	2,538		11%	9.5	\$3.73	\$4.06
Total YTD Tonnes	22,285	-17.1%	100%	87.5	\$3.93	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 6 : Avocado Imports by Singapore

Market	Jul to June		share	Value	Year to date	Month of
	FY 2022/23	Chg LY			Unit Value	June
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	3,561	-0.2%	67%	21.9	\$6.16	\$5.59
New Zealand	324	-57.0%	6%	1.6	\$4.84	
Kenya	425	47.6%	8%	1.1	\$2.67	\$1.74
United States	275	139.1%	5%	1.8	\$6.45	\$5.76
Mexico	313	3.3%	6%	2.2	\$7.00	\$8.02
Other	430		8%	1.9		
Total YTD Tonnes	5,328	1.2%	100%	30.5	\$5.72	\$5.14

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 7 : Avocado Imports by Malaysia

Market	Jul to May		share	Value	Year to date	Month of
	2023	Chg LY			Unit Value	May
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	2,118	-19.9%	56%	14.3	\$6.75	\$5.90
United States	322	231.5%	9%	1.7	\$5.33	\$4.42
Kenya	392	-14.7%	10%	1.2	\$2.98	\$2.39
Mexico	216	504.9%	6%	1.1	\$4.95	
Philippines	253	56.8%	7%	0.7	\$2.87	\$3.33
Other	450		12%	1.1	\$2.54	
Total YTD Tonnes	3,751	-7.2%	100%	20.1	\$5.37	\$4.52

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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Japan (Jun 23)

Japan imported 57,173 tonnes of avocados in **12 months to June 23** and is 4.9 per cent higher than last year. Australia supplied 293 tonnes. Mexico, the lead supplier, was 6.3 per cent lower to 42,773 tonnes though has lifted 32 per cent in tej last 5 months. Peru increased 23 per cent to 10,367 tonnes.

Australia's recorded average CIF price was A\$4.77 compared to average A\$3.88 from all sources, influenced by Mexico and Peru.

Table 8 : Avocado Imports by Japan

Market	Jul to June		share	Value A\$ Mill	Year to date	Month of
	FY 2022/23 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	June A\$ per kg CIF
Australia	293	227.1%	1%	1.4	\$4.77	
Mexico	42,773	-6.3%	75%	166.5	\$3.89	\$4.14
Peru	13,619	61.2%	24%	52.2	\$3.83	\$3.67
New Zealand	160	-2.1%	0%	0.7	\$4.28	
United States	40	-60.7%	0%	0.3	\$6.84	\$10.99
Other	289		1%	1.2		
Total YTD Tonnes	57,173	4.9%	100%	222.0	\$3.88	\$3.88

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

India (May 23)

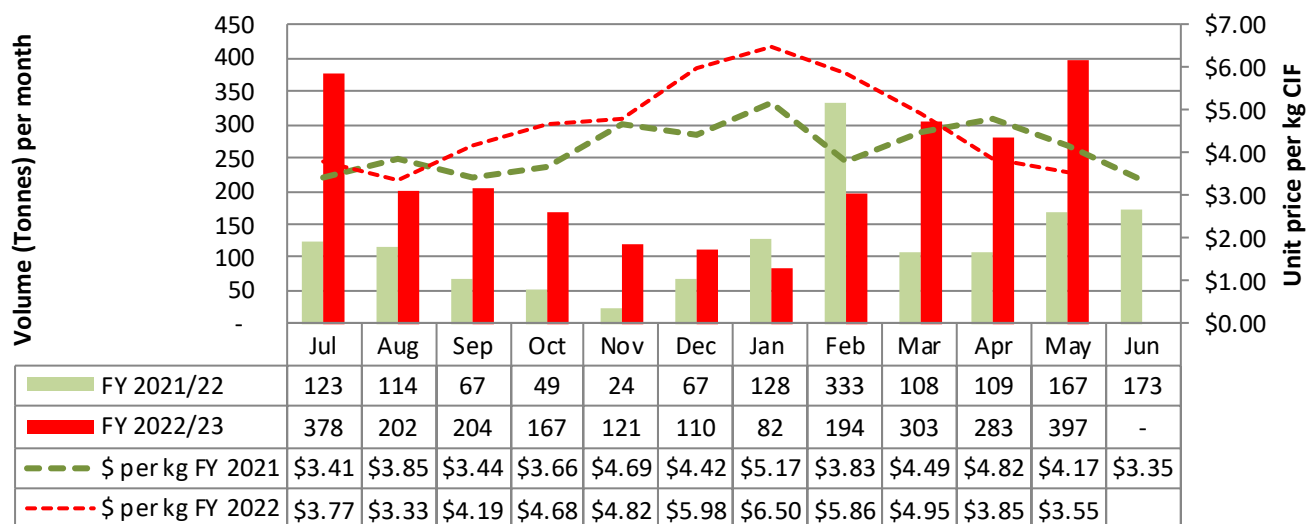
India imported 2,441 tonnes of avocados in **11 months to May 23** and is 89 per cent above last year. Tanzania supplied 1,753 tonnes is its first year of access and now leads the trade with 72 per cent share. Netherlands (ex Peru) is 34 per cent lower and Peru is 95 per cent lower with just 11 tonnes. Australia's first consignments will be recorded in June figures when released.

Table 9 : Avocado Imports by India

Market	Jul to May		share	Value A\$ Mill	Year to date	Month of
	FY 2022/23 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	May A\$ per kg CIF
Tanzania	1,753	751.7%	72%	7.1	\$4.04	\$3.85
New Zealand	277	-34.5%	11%	1.7	\$6.07	\$3.86
Netherlands	309	-33.3%	13%	1.6	\$5.26	
Peru	11	-94.6%	0%	0.0	\$3.74	\$3.67
Kenya	51		2%	0.1	\$2.65	
Other	40		2%	0.2		
Total YTD Tonnes	2,441	89.1%	100%	10.6	\$4.36	\$3.85

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**

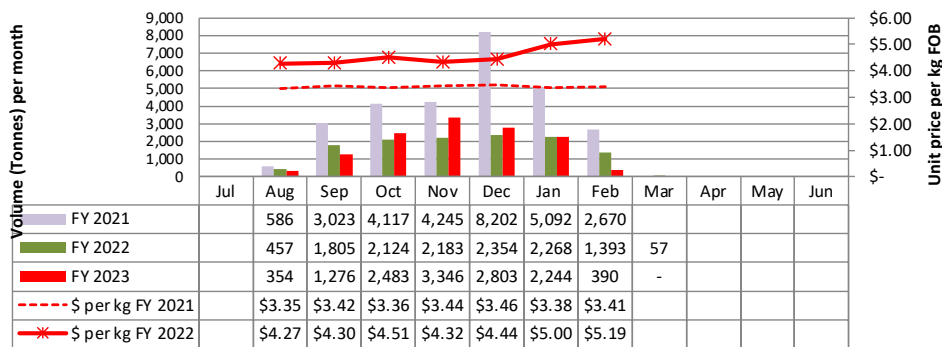
Market	2022/23	Chg LY	Value	Unit Value
	Tonnes	%	A\$ Mill	A\$ per kg
New Zealand	12,029	-5%	54.7	\$4.54
Chile	868		3.7	\$4.26
Total YTD Tonnes	12,896	2%	58.4	\$4.52

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. No further imports are expected until August 2023.

Figure 2 Avocado Imports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis