



# Monthly Export / Import Update

## September 2023

### EXPORTS

By September 23, first quarter of the 2023/24 year, exports of avocados recorded **5,524** tonnes worth A\$22.95m and was **89 per cent** above the same period last year (Table 1). The overall value increased by 65 per cent. Unit values were 12.6 per cent lower at AU\$4.16 per kg (FOB). The MAT (Moving Annual Total) was 13,273 tonnes, up 11.7 per cent since the previous month's MAT showing a very strong positive momentum.

**Table 1 : Avocado Key Measures**

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	5,524	89%	13,273
Value (M AUD)	22.95	65%	67.8
\$ per kg (FOB)	\$4.16	-12.6%	\$5.11

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 2,429 tonnes, up 77 per cent followed by Singapore (+45%) and Malaysia (+154%). These markets accounted for 93 per cent of the exports to date.

There were 358 tonnes exported to Japan (+258%) from Western Australia, and the first 76 tonnes to Thailand since the new protocol. (Table 3).

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

Market	2021/22		2022/23		Chg LY	share	MAT
	Tonnes	%	Tonnes	%			
Hong Kong	1,369		2,429	77%	44.0%	6,134	
Singapore	996		1,446	45%	26.2%	3,847	
Malaysia	418		1,061	154%	19.2%	2,389	
Japan	100		358	258%	6.5%	535	
Thailand	-		76	++	1.4%	76	
United Arab Emirates	0		46	++	0.8%	67	
Qatar	2		29	1279%	0.5%	37	
Indonesia	6		24	309%	0.4%	67	
Brunei Darussalam	8		11		0.2%	33	
Fiji	8		10		0.2%	19	
Maldives	-		10		0.2%	10	
Kuwait	-		7		0.1%	8	
all other	15		16			52	
<b>Total YTD Tonnes</b>	<b>2,922</b>		<b>5,524</b>	<b>89%</b>	<b>100%</b>	<b>13,273</b>	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

**Table 2. Avocado By State**

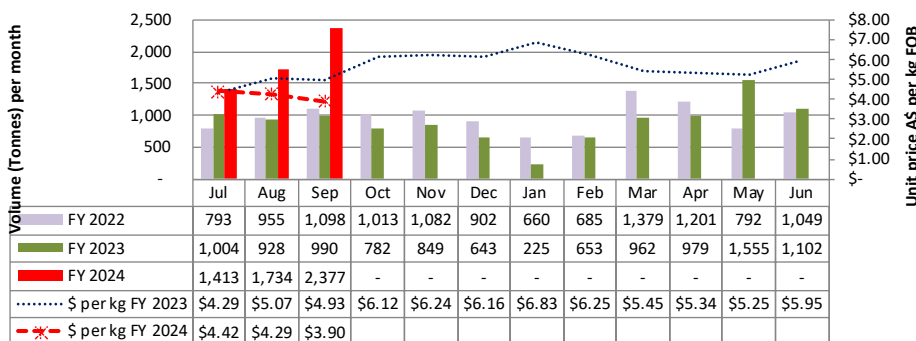
	2022/23		2023/24		Chg LY	share	MAT
	Tonnes	%	Tonnes	%			
Queensland	2,082		2,019	-3%	37%	7,141	
Western Australia	162		1,474	811%	27%	2,522	
New South Wales	521		1,029	98%	19%	2,036	
Victoria	133		872	556%	16%	1,200	
South Australia	23		130	458%	2%	373	
Other	1		0		0%	2	
<b>Total</b>	<b>2,922</b>		<b>5,524</b>	<b>89%</b>	<b>100%</b>	<b>13,273</b>	

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Queensland was the largest export state for the month and 3 per cent lower to 2,019 tonnes. Western Australia was 8 x higher to 1,474 tonnes for the first quarter of the season (Table 2).

On a month to month basis the September exports were 140 per cent higher at 2,477 tonnes compared to 990 tonnes a year ago and FOB prices were 21 per cent lower at A\$3.90 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 49 per cent of avocado shipments in July lifting 158 per cent compared to Sept last year.

**Table 4. Avocado By Transport Mode**

	2023/24		share
	Tonnes	change	
Air	2,806	50%	51%
Sea	2,718	158%	49%
<b>Total</b>	<b>5,524</b>	<b>89%</b>	<b>100%</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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### MARKET INSIGHTS

#### Hong Kong (Sept 23)

Hong Kong imported 8,809 tonnes of avocados from July to September 2023, which was 67 per cent more than the previous year. More than 60 per cent is re-exported to China. Australia supplied 2,237 tonnes or 62 per cent more. Peru is the largest supplier and was up 132 per cent to 5,856 tonnes where most of this is reexported to China. Mexico was 54 per cent lower to 351 tonnes.

**Table 5 : Avocado Imports by Hong Kong**

Market	Jul to September		share	Value	Year to date	Month of
	FY 2023/24	Chg LY			Unit Value	September
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	2,237	62.3%	25%	10.8	\$4.84	\$4.79
Peru	5,856	131.8%	66%	14.6	\$2.48	\$2.81
Mexico	351	-54.4%	4%	1.5	\$4.27	\$6.51
New Zealand	174	63.5%	2%	0.7	\$3.92	\$3.87
Other	191		2%	0.9	\$4.45	\$0.00
<b>Total YTD Tonnes</b>	<b>8,809</b>	<b>67.4%</b>	<b>100%</b>	<b>28.4</b>	<b>\$3.23</b>	<b>\$4.04</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

#### Singapore (Sept 23)

Singapore imported 1,688 tonnes of avocados from July to September 2023, 84 per cent more than last year. Australia supplied 1,433 tonnes or 85 per cent more than a year ago accounting for 85 per cent market share. Kenya supplied 50 per cent more or 102 tonnes while Peru entered the market with 12 tonnes. Australia's recorded CIF prices were A\$4.16 in September compared to A\$4.07 average for all suppliers.

**Table 6 : Avocado Imports by Singapore**

Market	Jul to September		share	Value	Year to date	Month of
	FY 2023/24	Chg LY			Unit Value	September
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	1,433	93.9%	85%	6.9	\$4.79	\$4.16
Kenya	102	50.0%	6%	0.2	\$2.22	\$2.62
Mexico	12	500.0%	1%	0.1	\$9.03	\$10.50
China	24	++	1%	0.1	\$3.95	\$4.05
Peru	18	++	1%	0.1	\$4.28	
Other	99		6%	0.3		
<b>Total YTD Tonnes</b>	<b>1,688</b>	<b>83.9%</b>	<b>100%</b>	<b>7.7</b>	<b>\$4.54</b>	<b>\$4.07</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

#### Malaysia (Aug 23)

Malaysia has imported 947 tonnes of avocados from July to August 2023, which was 52 per cent more than last year. Australia supplied 669 tonnes or 73 per cent more than last year and holds 71 per cent market share. Kenya increased 86 per cent to 160 tonnes and 17 per cent market share. Australian CIF prices were recorded A\$5.18 average for the year and dropped to \$4.90 in August possibly under pressure from low offers from Kenya recording \$2.12 per kg.

**Table 7 : Avocado Imports by Malaysia**

Market	Jul to August		share	Value	Year to date	Month of
	2023	Chg LY			Unit Value	August
	Tonnes	%	% YTD	A\$ Mill	A\$ per kg CIF	A\$ per kg CIF
Australia	669	73.1%	71%	3.5	\$5.18	\$4.90
Kenya	160	86.7%	17%	0.4	\$2.18	\$2.12
Philippines	33	-46.6%	4%	0.1	\$3.10	\$3.10
Indonesia	32	-7.7%	3%	0.0	\$1.06	\$1.07
Singapore	14		1%	0.0	\$1.21	\$1.21
Other	38		4%	0.1	\$1.41	
<b>Total YTD Tonnes</b>	<b>947</b>	<b>51.8%</b>	<b>100%</b>	<b>4.0</b>	<b>\$4.25</b>	<b>\$4.15</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



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### Japan (Sept 23)

Japan imported 15,465 tonnes of avocados from July to September 23 which is 25 per cent higher than last year. Australia supplied 136 tonnes. Mexico, the lead supplier over a year, was 43 per cent higher to 6,007 tonnes though has lifted 32 per cent in the last 5 months. Peru increased 18 per cent to 9,318 tonnes. Australia's recorded average CIF price was A\$4.33 compared to average A\$4.11 from all sources.

**Table 8 : Avocado Imports by Japan**

Market	Jul to September		share	Value A\$ Mill	Year to date	Month of
	FY 2023/24 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	September A\$ per kg CIF
Australia	136	103.9%	1%	0.6	\$4.40	\$4.33
Mexico	6,007	43.1%	39%	26.6	\$4.42	\$4.63
Peru	9,318	18.0%	60%	31.6	\$3.39	\$3.47
Colombia	-	-100.0%	0%	-		
Other	3		0%	0.0		
<b>Total YTD Tonnes</b>	<b>15,465</b>	<b>25.1%</b>	<b>100%</b>	<b>58.8</b>	<b>\$3.80</b>	<b>\$4.11</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

### Thailand (Aug 23)

Thailand imported 313 tonnes of avocados from July to August 23 and is 22 per cent lower than last year. New Zealand supplied 164 tonnes and Peru has supplied 150 tonnes leading to a changeover period to NZ supply. Australia's first consignments to Thailand from Western Australia should show up in the Thailand data from October.

**Table 9 : Avocado Imports by Thailand**

Market	Jul to August		share	Value A\$ Mill	Year to date	Month of
	Jul to Tonnes	Chg LY %			Unit Value A\$ per kg CIF	August A\$ per kg CIF
Australia	-	++	0%	-		
New Zealand	164	107.7%	52%	1.3	\$7.69	\$7.39
Peru	150	-54.1%	48%	0.7	\$4.96	\$4.94
Other	-		0%	-		
<b>Total YTD Tonnes</b>	<b>313</b>	<b>-22.6%</b>	<b>100%</b>	<b>2.0</b>	<b>\$6.38</b>	<b>\$5.75</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

### India (Aug 23)

India imported 882 tonnes of avocados from July to August 23 and is 52 per cent above last year. Tanzania supplied 852 tonnes and now accounts for 97 per cent share. Netherlands (ex Peru) is 77 per cent lower and there are no other suppliers expect for 3 tonnes from New Zealand. Australia's first consignments were recorded in June and July, with the July consignments recorded here.

**Table 10 : Avocado Imports by India**

Market	Jul to August		share	Value A\$ Mill	Year to date	Month of
	FY 2023/24 Tonnes	Chg LY %			Unit Value A\$ per kg CIF	August A\$ per kg CIF
Australia	5	++	1%	0.0	\$4.13	\$5.10
Tanzania	852	104.1%	97%	2.8	\$3.26	\$3.31
Netherlands	22	-77.9%	2%	0.2	\$8.81	\$8.81
New Zealand	3	-32.7%	0%	0.0	\$7.88	
Kenya	-	-100.0%	0%	-		
Other	-		0%	0.0		
<b>Total YTD Tonnes</b>	<b>882</b>	<b>52.1%</b>	<b>100%</b>	<b>3.0</b>	<b>\$3.42</b>	<b>\$3.58</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

### IMPORTS

The imports for the 2023/24 import have commenced from New Zealand. Imports of avocados were **211** tonnes worth A\$0.78m or 87 per cent less than last year (Table 11). Unit values decreased 14 per cent to A\$3.69 and has meant the overall value decreased by 89 per cent for the period. The MAT (Moving Annual Total) was 11,478 tonnes easing 8.7 per cent in the month.

**Table 11 : Import Key Measures**

IMPORTS	YTD (from July	Chg LY	MAT
Volume (tonnes)	211	-87%	11,478
Value (M AUD)	0.78	-89%	52.1
\$ per kg	\$3.69	-14.0%	\$4.54

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

**Table 12 : Avocado Imports by Market**

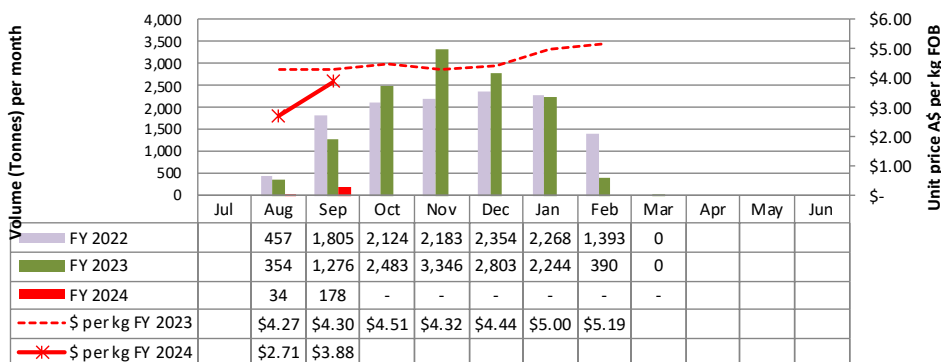
Market	July to September		Value	Unit Value
	2023/24	Chg LY		
	Tonnes	%	A\$ Mill	A\$ per kg
New Zealand	211	-87%	0.8	\$3.69
Chile	-	-	-	-
<b>Total YTD Tonnes</b>	<b>211</b>	<b>-87%</b>	<b>0.8</b>	<b>\$3.69</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

No volume has been recorded from Chile, including exports from Chile to Australia.

September imports recorded 178 tonnes, compared to 1,276 tonnes for the same month last year, and considerably less than the 1,805 tonnes recorded in September 22.

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



Source: IHS Global Trade Atlas; Fresh Intelligence analysis