



Facts at a Glance **2022/23** **for the Australian** **avocado industry**

Key statistics of the Australian avocado industry
Data current at September 2023



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Report notes

Export values are calculated using Free on Board (FOB) price.

Gross Value of Production (GVP) for annual Australian avocado production is estimated by combining: local wholesale value of fresh volume; local wholesale value of processing volume; and export value (FOB) of exported volume.

Consumer market value is estimated using average retail prices (Coles and Woolworths online price data) multiplied by Australian avocado volumes (fresh and processed) that are supplied to the Australian consumer market. The consumer market is broadly defined as both retail and foodservice channels.

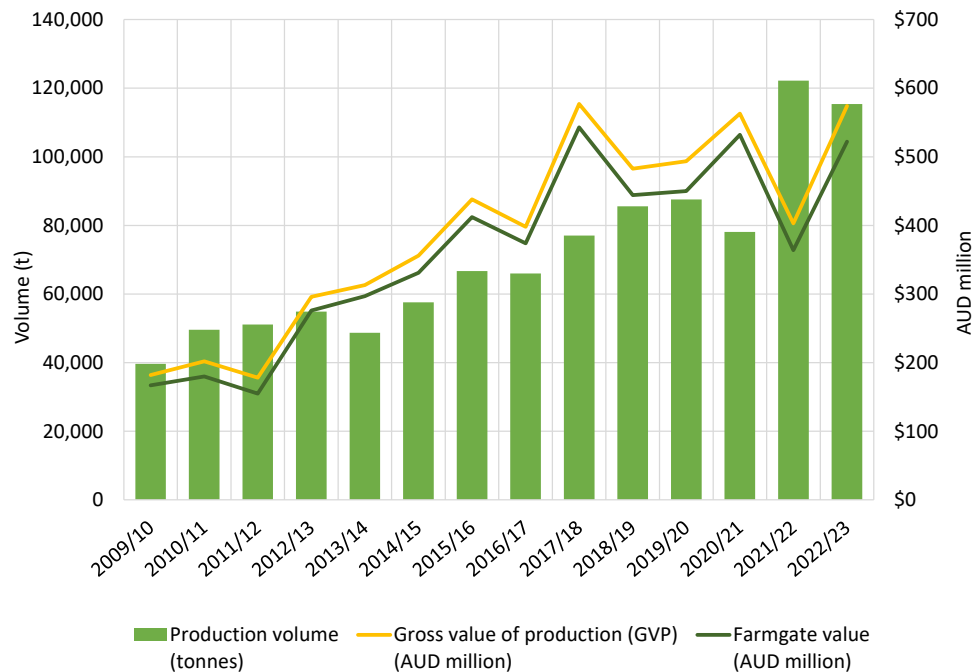
Farmgate value is estimated by multiplying the Australian avocado production volume by the local wholesale price minus estimated marketing/supply chain costs.

Australian consumption is estimated using total volume supplied to the Australian market divided by Australian population (based on ABS data).

Data source is Infocado unless otherwise stated. Infocado is the data collection platform from which avocado supply and forecast volumes are reported. The production of these reports is currently funded through AV20000. See <http://www.avocado.org.au/our-programs/supply-chain-data/infocado/> for more information.

Avocado production and value

Australian annual avocado production and value



Australia produced just over 115,385 tonnes of avocados in 2022/23, which was 5.57% less than the previous year. However the gross value of production (GVP) for Australian avocados was estimated at \$574 million, 42.43% more than the previous year.

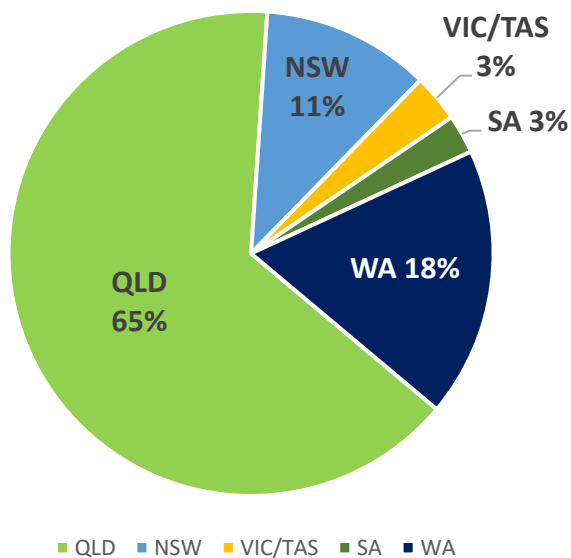
Australian avocado production

| Year | Production volume (tonnes) | Number of 5.5kg trays | Gross value of production (GVP) (AUD million) | Farmgate value (AUD million) | Consumer market value of Australian fruit sold domestically (AUD million) | Export value (AUD million) |
|---------|----------------------------|-----------------------|---|------------------------------|---|----------------------------|
| 2013/14 | 48,715 | 8,857,217 | \$ 313 | \$ 297 | \$ 668 | \$ 5.6 |
| 2014/15 | 57,595 | 10,471,887 | \$ 356 | \$ 331 | \$ 750 | \$ 6.4 |
| 2015/16 | 66,716 | 12,130,207 | \$ 438 | \$ 412 | \$ 899 | \$ 9.2 |
| 2016/17 | 65,992 | 11,998,467 | \$ 398 | \$ 374 | \$ 755 | \$ 12.5 |
| 2017/18 | 77,032 | 14,005,754 | \$ 557 | \$ 543 | \$ 958 | \$ 11.6 |
| 2018/19 | 85,546 | 15,553,808 | \$ 483 | \$ 444 | \$ 898 | \$19.6 |
| 2019/20 | 87,546 | 15,917,477 | \$ 493 | \$ 450 | \$ 845 | \$25.0 |
| 2020/21 | 78,085 | 14,197,276 | \$ 563 | \$ 532 | \$ 861 | \$22.0 |
| 2021/22 | 122,197 | 22,217,709 | \$403 | \$364 | \$666 | \$52.00 |
| 2022/23 | 115,385 | 20,979,061 | \$574 | \$522 | \$969 | \$58.75 |

Sources: Infocado, Global Trade Atlas, and Avocados Australia analysis using Ausmarket Consultants data and Freshlogic assumptions

Avocado production by state

Avocado production by state
2022-23



Queensland continues to produce the majority of Australian avocados, with 65% of production. Western Australia produced the next largest share at 18%.

Avocado production by state (tonnes)

| Year | Qld | NSW | Vic/Tas | SA | WA/NT | Total |
|---------|--------|--------|---------|-------|--------|---------|
| 2012/13 | 30,195 | 3,373 | 303 | 2,431 | 18,575 | 54,877 |
| 2013/14 | 33,925 | 5,801 | 1,348 | 1,479 | 6,163 | 48,715 |
| 2014/15 | 28,010 | 4,666 | 1,699 | 1,396 | 21,824 | 57,595 |
| 2015/16 | 32,875 | 6,693 | 1,524 | 1,853 | 23,771 | 66,716 |
| 2016/17 | 42,039 | 6,980 | 1,881 | 1,608 | 13,483 | 65,992 |
| 2017/18 | 45,170 | 7,791 | 2,579 | 1,312 | 20,180 | 77,032 |
| 2018/19 | 47,999 | 9,773 | 538 | 1,618 | 25,617 | 85,546 |
| 2019/20 | 43,067 | 6,589 | 2,209 | 2,442 | 33,239 | 87,546 |
| 2020/21 | 53,987 | 8,185 | 1,028 | 1,338 | 13,547 | 78,085 |
| 2021/22 | 58,640 | 9,694 | 2,866 | 3,683 | 47,316 | 122,197 |
| 2022/23 | 74,957 | 12,966 | 3,685 | 2,994 | 20,782 | 115,385 |

Source: Infocado

Avocado regions in Australia

Annual tonnes produced in each region averaged over two years*: 2021/22 and 2022/23



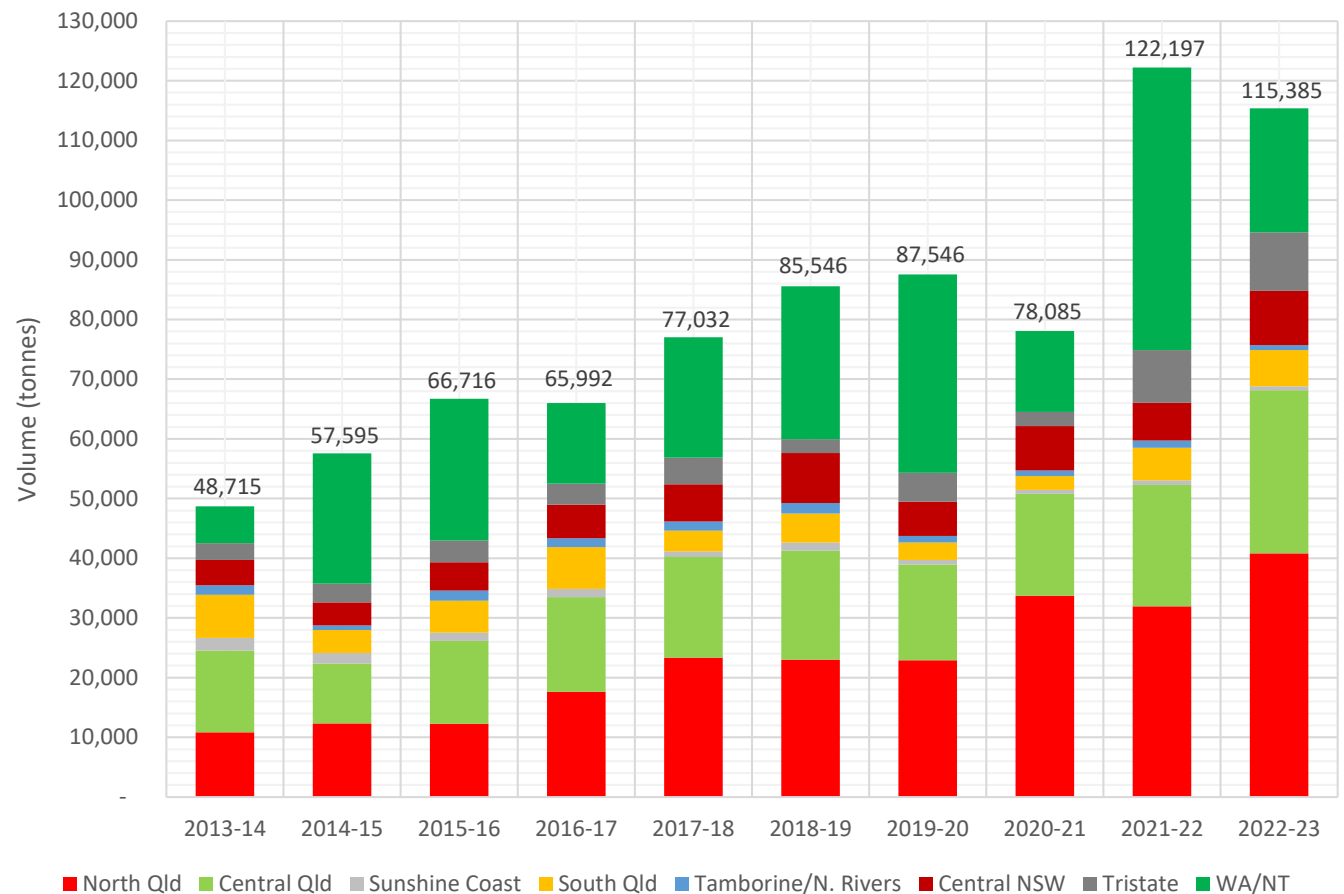
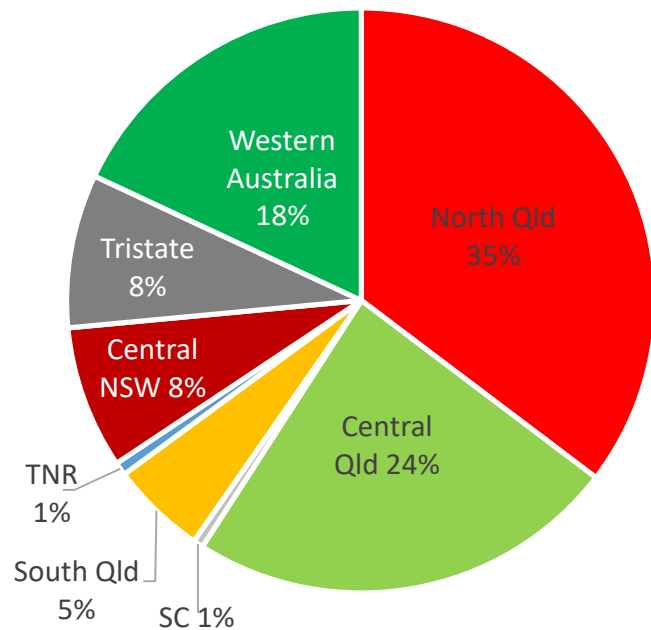
* A two-year average is used to compare production by region, because some regions have irregular bearing years, meaning crop load may vary significantly from year to year.

| State/s | Region |
|---|--|
| Queensland | North Queensland (NQ) |
| | Central Queensland (CQ) |
| | Sunshine Coast (SC) |
| | South Queensland (SQ) |
| Queensland & New South Wales | Tambrone / Northern Rivers (TNR) |
| New South Wales | Central New South Wales (CNSW) |
| New South Wales, Victoria, South Australia & Tasmania | Tristate (Tri) |
| Western Australia & Northern Territory | Western Australia & Northern Territory (WA/NT) |

Australia's avocado production is divided into regions which have similar growing conditions and seasons. Some regions cross state boundaries. On average across 2021/22 and 2022/23, production has mostly come from the Queensland regions (57%) and Western Australia (29%).

Avocado production by region

Avocado production by region 2022/2023



Source: Infocado

Avocado production by region

Respective to the previous year, North and Central Queensland volume increased by 28% and 35%, however Western Australia decreased by 56%. In total production diminished 6%.

| Australian avocado production by growing region (tonnes) | | | | | | | | | |
|--|-----------|-------------|----------------|-----------|---------------------------|-------------|----------|-------------------|----------------|
| Year | North Qld | Central Qld | Sunshine Coast | South Qld | Tamborine Northern Rivers | Central NSW | Tristate | Western Australia | Total |
| 2012/13 | 10,399 | 13,164 | 2,603 | 4,027 | 533 | 2,843 | 2,734 | 18,575 | 54,877 |
| 2013/14 | 10,859 | 13,668 | 2,131 | 7,243 | 1,586 | 4,208 | 2,857 | 6,163 | 48,715 |
| 2014/15 | 12,310 | 10,054 | 1,782 | 3,848 | 781 | 3,815 | 3,182 | 21,824 | 57,595 |
| 2015/16 | 12,285 | 13,857 | 1,421 | 5,301 | 1,737 | 4,752 | 3,592 | 23,771 | 66,716 |
| 2016/17 | 17,599 | 15,882 | 1,401 | 6,964 | 1,500 | 5,645 | 3,517 | 13,483 | 65,992 |
| 2017/18 | 23,346 | 16,851 | 927 | 3,470 | 1,548 | 6,260 | 4,450 | 20,180 | 77,032 |
| 2018/19 | 23,023 | 18,216 | 1,389 | 4,877 | 1,722 | 8,408 | 2,294 | 25,617 | 85,546 |
| 2019/20 | 22,902 | 16,049 | 778 | 2,929 | 1,071 | 5,748 | 4,830 | 33,239 | 87,546 |
| 2020/21 | 33,716 | 17,100 | 641 | 2,296 | 931 | 7,453 | 2,399 | 13,547 | 78,085 |
| 2021/22 | 31,933 | 20,331 | 804 | 5,433 | 1,229 | 6,347 | 8,805 | 47,316 | 122,197 |
| 2022/23 | 40,795 | 27,359 | 632 | 6,064 | 841 | 9,120 | 9,792 | 20,782 | 115,385 |
| 2022/23 % by region | 35% | 24% | 1% | 5% | 1% | 8% | 8% | 18% | |
| Past 2yr average % by region | 31% | 20% | 1% | 5% | 1% | 7% | 8% | 28% | |

Source: Infocado

Avocado supply periods by region



Hass Avocado



Shepard Avocado

| Australian avocado supply periods by region and variety | | | | | | | | | | | | | |
|---|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Region | Variety | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| North Queensland | Hass | | | | | | | | | | | | |
| | Shepard | | | | | | | | | | | | |
| Central Queensland | Hass | | | | | | | | | | | | |
| | Shepard | | | | | | | | | | | | |
| Sunshine Coast | Hass | | | | | | | | | | | | |
| South Queensland | Hass | | | | | | | | | | | | |
| Tamborine/Northern Rivers | Hass | | | | | | | | | | | | |
| Central New South Wales | Hass | | | | | | | | | | | | |
| Tristate | Hass | | | | | | | | | | | | |
| Western Australia | Hass | | | | | | | | | | | | |
| New Zealand | Hass | | | | | | | | | | | | |

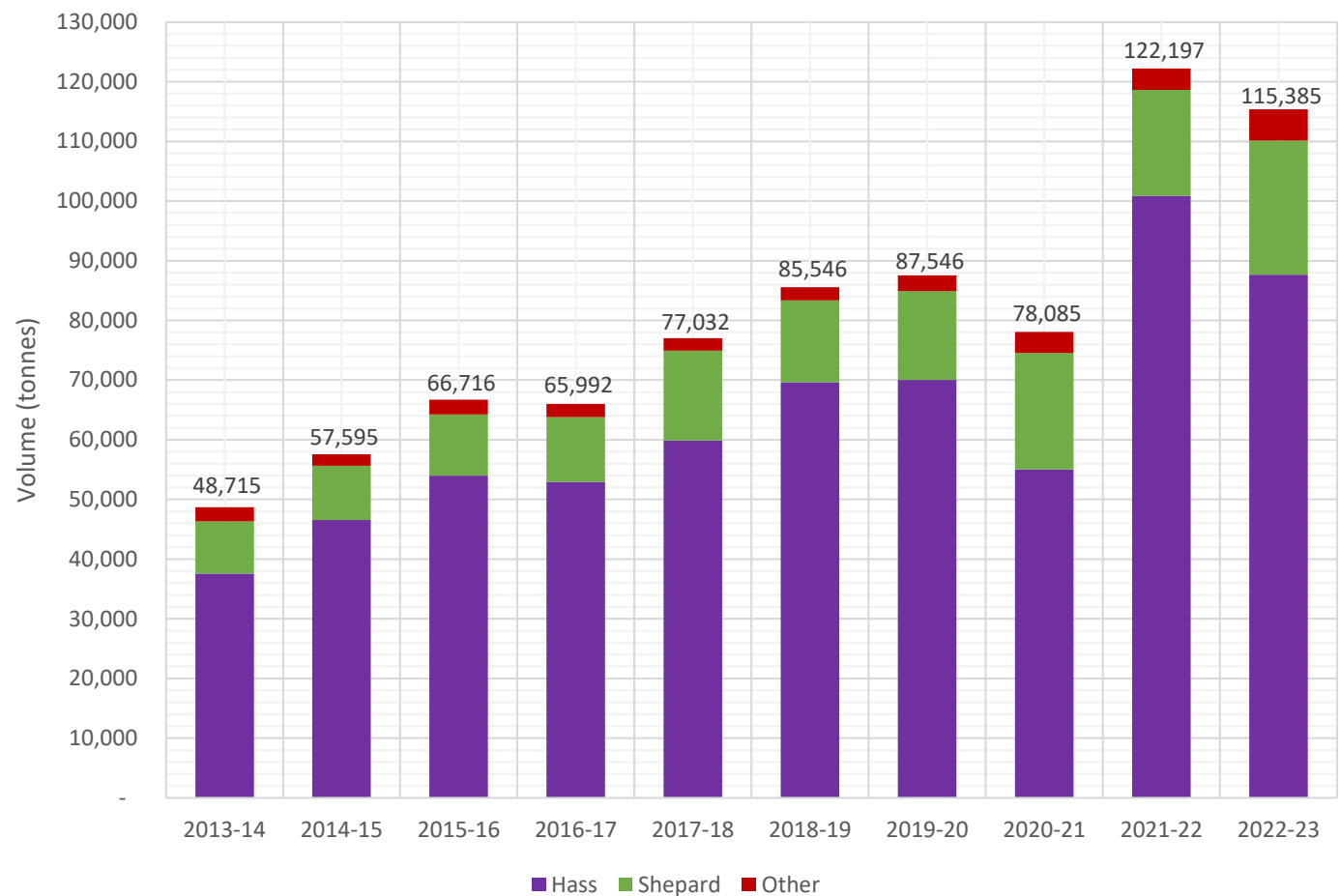
Avocado production by variety

In Australia, avocados are produced all year round due to the range of climates and conditions in our eight major avocado growing regions.

Hass is the main avocado variety, and is produced almost all year round. In 2022/23 Hass represented 76% of production, 7% less than the previous year, as Shepard and Other varieties have increased their share of the total.

Shepard, which is harvested in Queensland, now makes up 19% of total production (up 5% from last year), and through late Summer and Autumn, is the dominant Australian variety on the market.

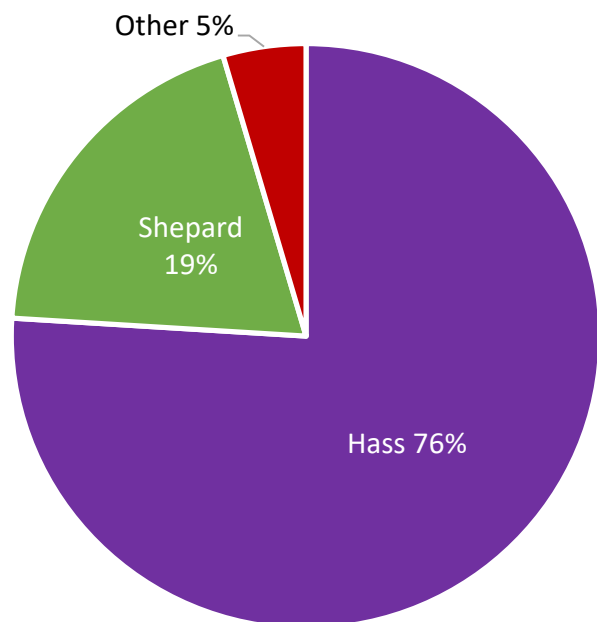
Australian annual avocado production volume (tonnes) by variety



Source: Infocado

Avocado production by variety

Australia's avocado production by variety in 2022/23



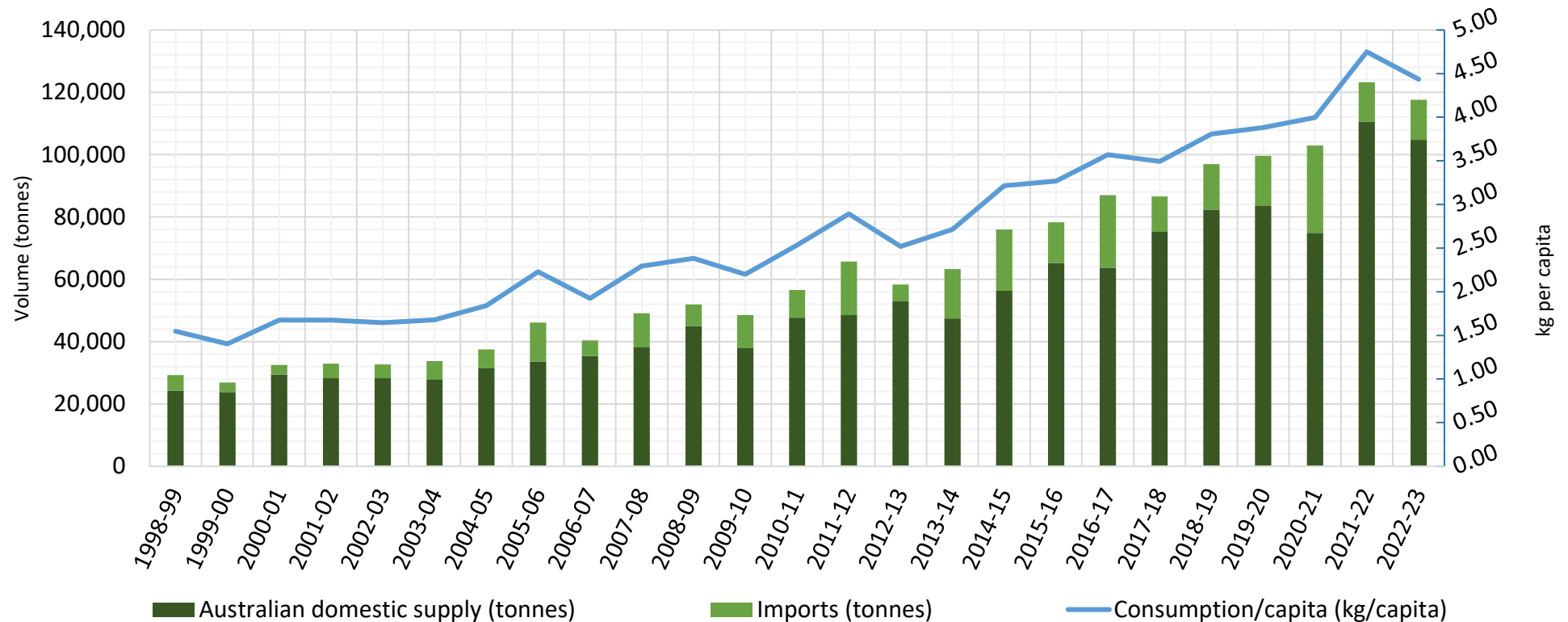
The 5% of fruit which is not Hass or Shepard is made up of varieties including: Maluma, Reed, Carmen, Lamb, Wurtz, Gem, Fuerte, Turner, Sharwil, Gwen, Edrinol, Pinkerton, Zutano, Bacon, Ryan, Ettinger, Sir Prize, Hazzard, Rincon, Llanos, Santana, Linda, Anaheim, Nabal.

| Production by Variety (tonnes) | | | | |
|--------------------------------|---------|---------|-------|---------|
| Year | Hass | Shepard | Other | Total |
| 2012/13 | 41,398 | 9,923 | 3,556 | 54,877 |
| 2013/14 | 37,578 | 8,774 | 2,363 | 48,715 |
| 2014/15 | 46,540 | 9,090 | 1,966 | 57,595 |
| 2015/16 | 53,965 | 10,281 | 2,470 | 66,716 |
| 2016/17 | 52,962 | 10,860 | 2,169 | 65,992 |
| 2017/18 | 59,870 | 15,085 | 2,077 | 77,032 |
| 2018/19 | 69,612 | 13,775 | 2,160 | 85,546 |
| 2019/20 | 70,016 | 14,875 | 2,655 | 87,546 |
| 2020/21 | 55,025 | 19,540 | 3,521 | 78,085 |
| 2021/22 | 100,904 | 17,709 | 3,585 | 122,197 |
| 2022/23 | 87,670 | 22,467 | 5,247 | 115,385 |

Source: Infocado

Domestic avocado consumption

Australian annual domestic avocado supply, NZ imports and Australian per capita consumption

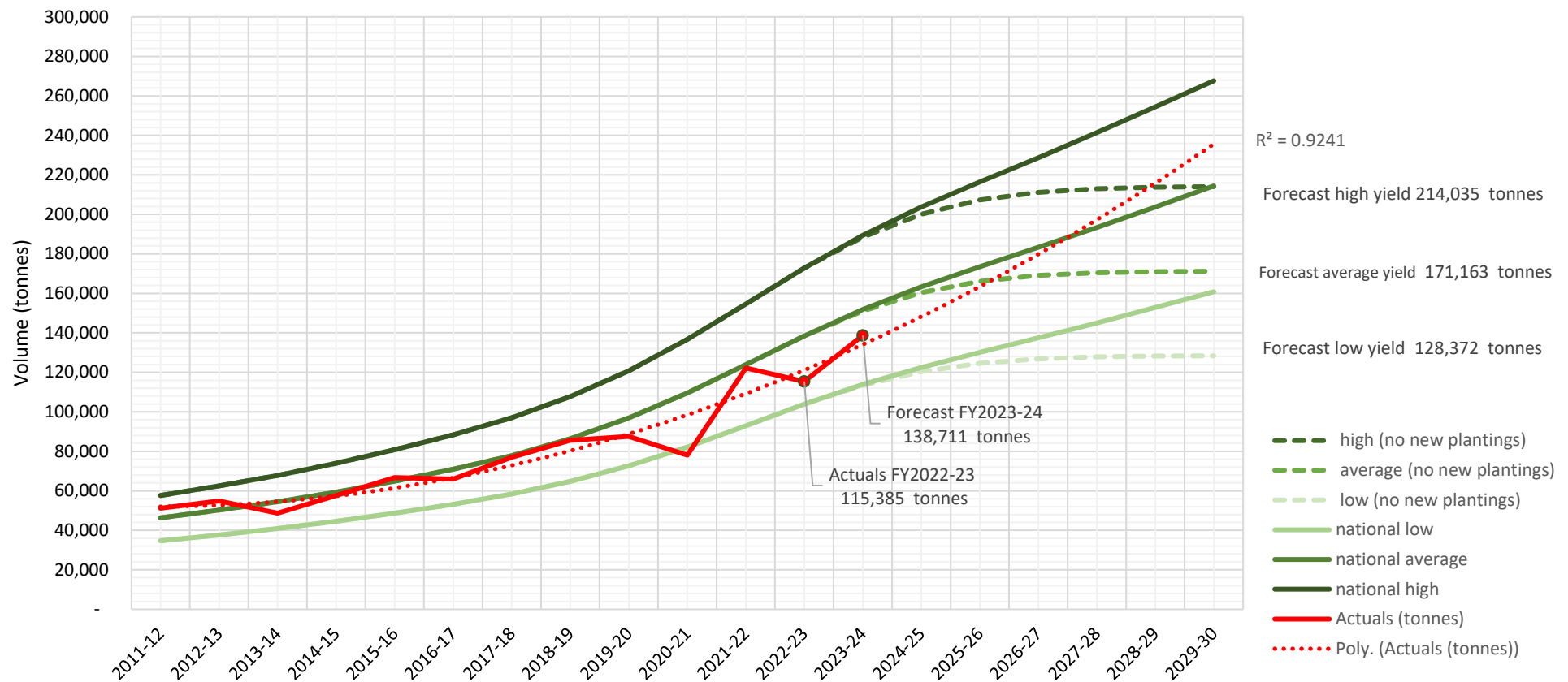


Australia avocado consumption in 2021/23 was 4.43 kg per person. Imported New Zealand fruit supplements Australian supply during their harvest season during Spring and Summer.

Source: Infocado, Global Trade Atlas (S&P Global 2023), and ABS.

Australian avocado production

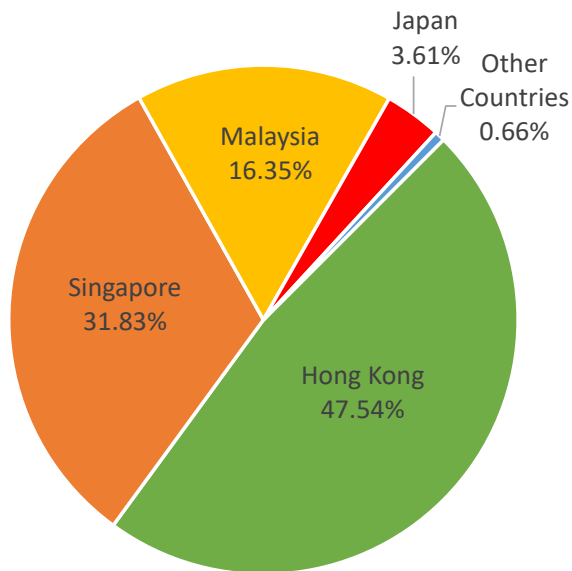
Australian avocado production model 2012-2030 (tonnes)



Australian production is forecast to increase strongly over the next few years, to around 170,000 tonnes per annum expected to be produced by 2026. Source: Infocado, Avocados Australia analysis .

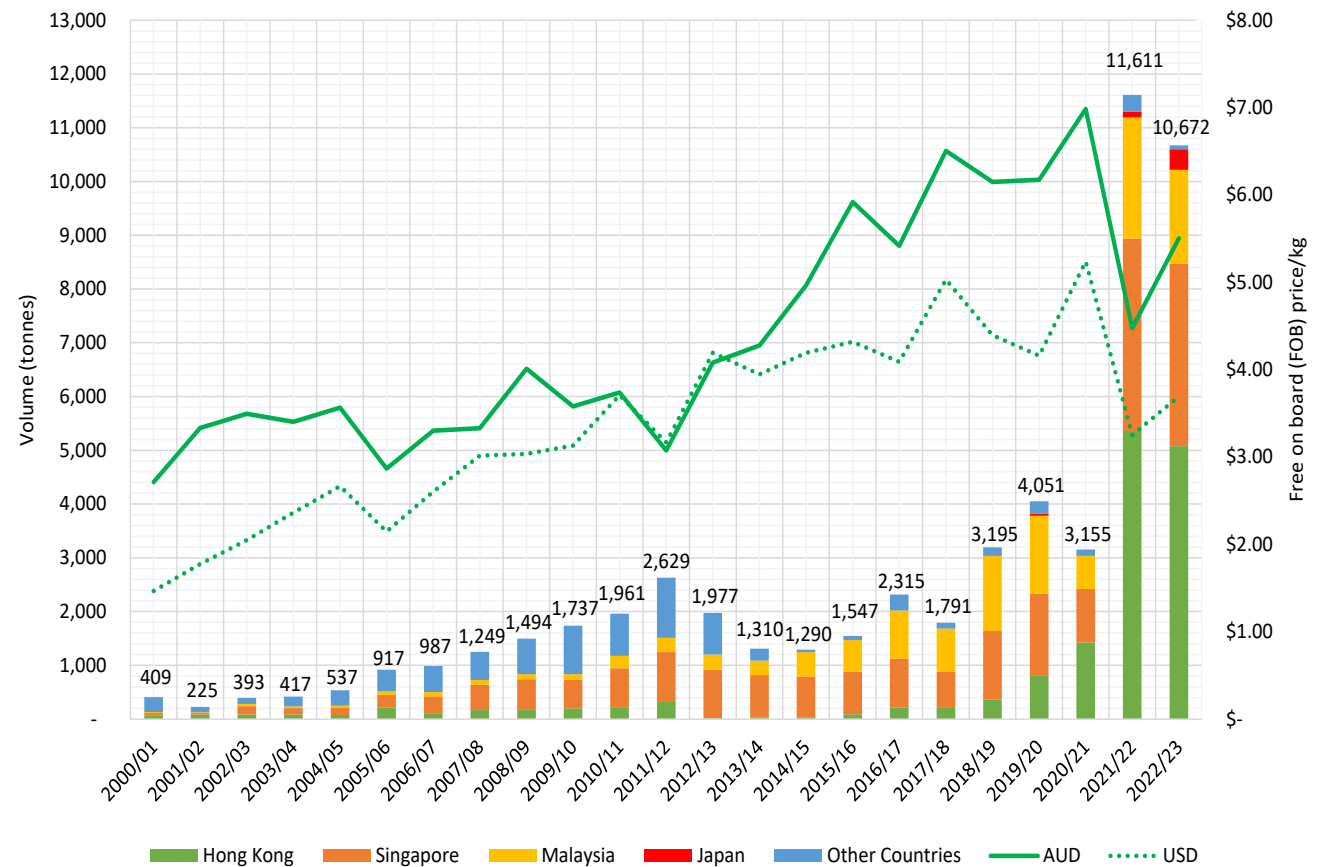
Australian avocado export markets

Australia's export markets in 2022/23



In both production and exports, Australia is currently a small player in the world avocado market. Ongoing activity is underway targeting Australia's growth in export markets. In 2022/23 Australia exported 10,672 tonnes, representing an 8% decrease over the previous financial year, and 9.25% of the total 115,385 tonnes produced in Australia.

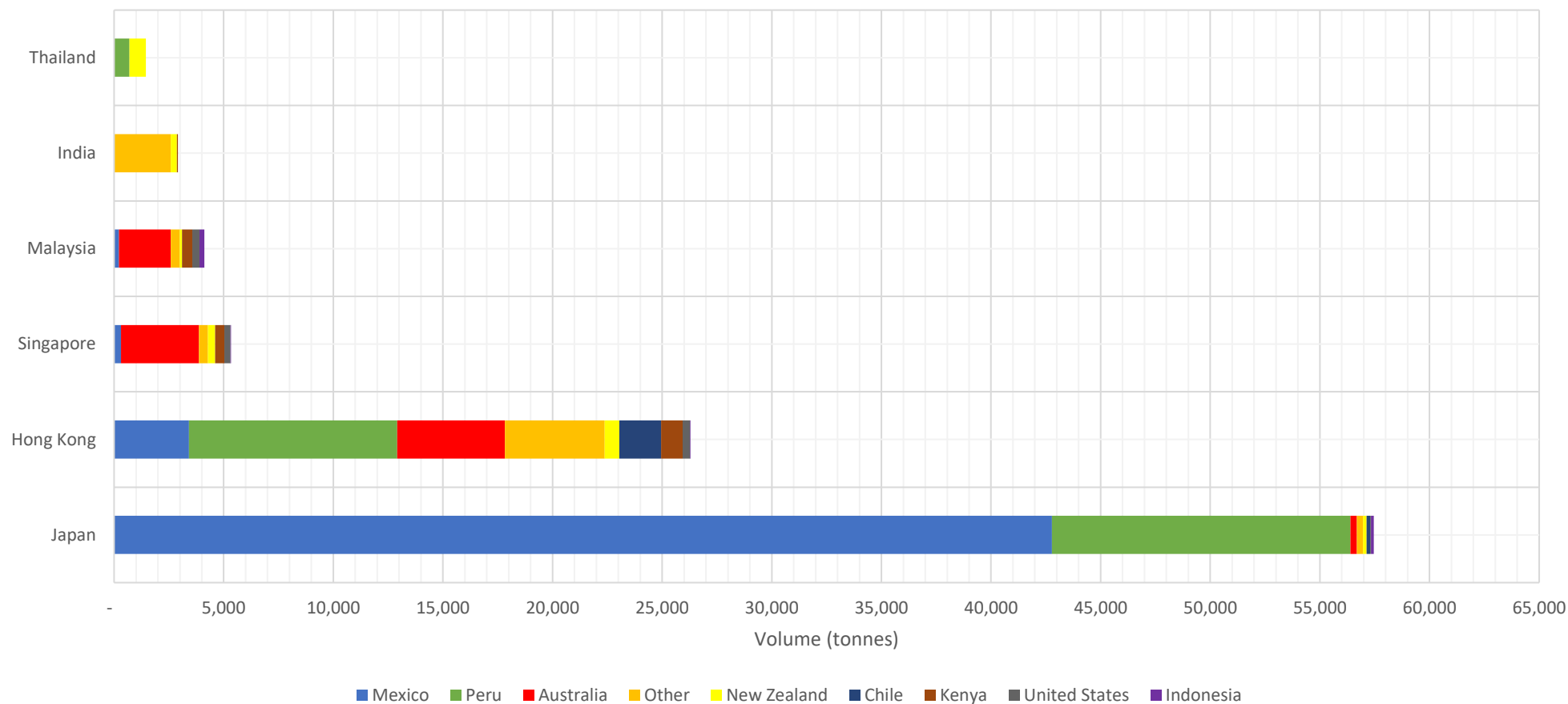
Australian annual avocado export volumes in tonnes by country and AU\$/Kg FOB



Source: Global Trade Atlas (S&P Global 2023)

Australian avocado export markets

Annual imported volumes by country of origin for the main Australian overseas markets

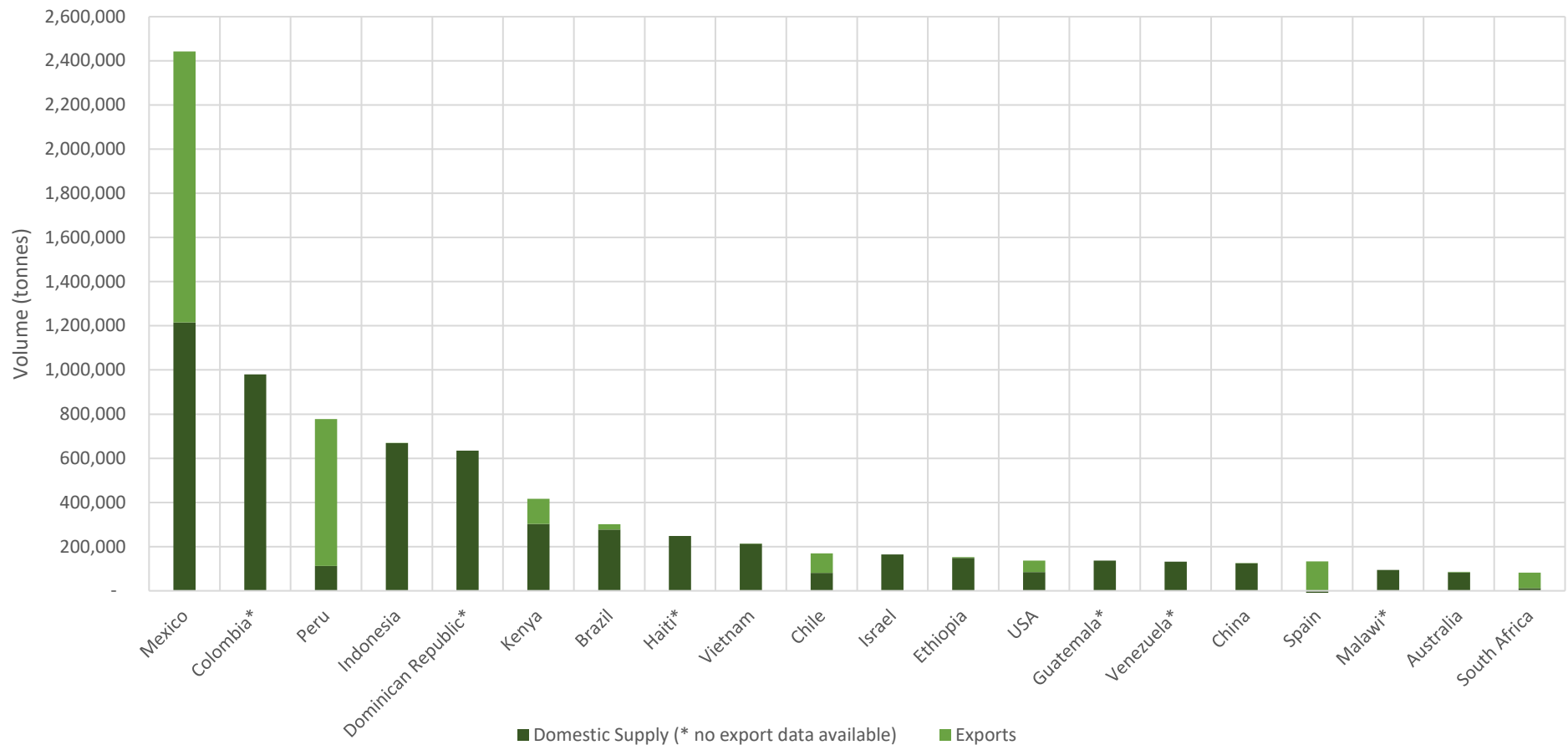


Source: Global Trade Atlas (S&P Global 2023)



Top 20 largest global producers

Avocado production and export volumes for the top 20 countries (production data from 2021)



Source: FAOSTAT (2021) Global Trade Atlas (S&P Global 2023)