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# Australian Avocado Export Strategy 2022-2026



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Strategic levy investment

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This strategy has been produced as part of the strategic levy investment project *Avocado export strategy 2022-2026* (AV21000). This project is funded by Hort Innovation, using the avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

## Why a new strategy?

A new Strategy (2022-2026) is required to guide investment in future export development initiatives so that the Australian avocado industry can optimise commercial outcomes both in the short- and long-term, recognising the increasingly challenging and globally competitive environment in which it now and in the future will operate.

This new Strategy identifies challenges and opportunities, as well as current and possible future market conditions. Through market research and consultation with key stakeholders (including growers, exporters, researchers, and importers /retailers in export markets), it outlines sub-strategies, approaches and actions and the outcomes being sought.

This Strategy will help to build a stronger future and aid industry decision making, as it will:

- Assist industry stakeholders to identify export growth opportunities for Australian product and risks that require attention and monitoring
- Assist Hort Innovation and Government with decisions regarding market access prioritisation
- Assist Avocados Australia with future submissions to Hort Innovation's International Market Access Assessment Panel which assess market access and improvement applications

Inform decisions around investments and activities (commercial and levy funded) related to R&D, industry export capability development, international market development and promotion.

## Assumptions

This Strategy has been written with the assumption that the Australian industry will target export volumes of at least 20,000 tonnes, at sustainable pricing levels.

This aligns with the target set in the Australian Avocado Industry Strategic Plan (2022-2026) and is in line with market demand modelling that has been undertaken as part of the development of this Strategy.

## Key Strategy Areas

- 1) Market Access and MRL Management – market access, maintenance and improvement strategies, MRL management strategy
- 2) Export Supply – quality, meeting market access protocols/ MRL requirements, packaging, traceability, food safety
- 3) Export Demand – market (trade) development, promotion
- 4) Capacity building – education for Australian growers and supply chain, education for importers, food service and retailers.

**NOTE: This Strategy should be read in conjunction with the White Paper available from Avocados Australia (25 May 2022), which provides greater detail and clarity about the current conditions and potential opportunities and challenges for the Australian avocado industry.**

## Context

### The bigger picture

There are numerous issues that will shape the export opportunities and challenges for the Australian avocado industry over the next 5 years. Foremost, at this time, are the ongoing challenges related to Covid, supply chain disruptions, labour access, global political instability and rising inflationary pressures, all leading to increased risk and costs in global export markets. However, there are also opportunities, including a rising middle class in Asia, a focus on health and wellbeing, new technologies supporting automation and Australia's enviable reputation as a sustainable producer of high-quality food products which can be leveraged.

### Current and projected industry performance

#### Production

Avocados Australia estimates that Australian production will reach 170,000 tonnes by 2025-2026 based on current plantings and average yields. This is more than double the 2020-21 production at 80,000 tonnes. Modelling shows there will be periods of very high supply with peak supply expected from March – May when domestic demand tends to be weaker.

#### Export market conditions

In 2020/21 the Australian avocado industry experienced a significant decline in domestic and export trading terms.

Australian avocado exports increased from 1,786 tonnes (AUD12m) in 2017/18 to 4,051 tonnes (AUD25m) in 2019/20. In CY 2021, Australia exported 8,078 tonnes of avocados (7% of total production) and will exceed 8,000 tonnes in FY2021/22. This recent export growth has predominantly been driven by lower pricing. Singapore, Malaysia and Hong Kong absorbed 96% of this fruit.

#### Projected export performance

Avocados Australia, through its Strategic Plan 2022-2026 has set a target to increase domestic consumption to at least 150,000 tonnes and exports to at least 20,000 tonnes by 2025-26.

Market demand modelling shows that a sustainable 20,000 tonne export market is feasible, if certain conditions are met, these predominantly being market access to Japan (east coast avocados), New Zealand, India and Thailand.

Scenario modelling shows that with current projected production volumes and a 20,000 tonne export market, it is likely that wholesale prices in the domestic market will continue to be subdued unless there is a substantial rise in the rate at which Australians increase their consumption of avocados.

If it is possible to move greater volumes of avocados into export markets, e.g., 30,000 tonnes, the modelling suggests there is greater likelihood that per capita consumption would stabilise at around 4.7 kg / person from 2023-24 onwards which may provide the opportunity for price increases in the category. Hence, if opportunities arise to export greater volumes of avocados this should be exploited.

# Challenges and Opportunities

## Challenges

- Market access technical limitations
- Limited research and scientific capacity to support market access protocols
- Existing markets have limited growth potential
- Competitiveness in export markets
- Shipping times and disruptions
- Meeting international MRL requirements
- Irregular bearing causing lack of supply continuity
- Limited export experience in the Australian supply base
- Quality and robustness of fruit
- Limited knowledge of potential export markets
- Move from air to sea freight supply logistics
- Identifying a Unique Selling Proposition (USP)
- Branding of Australian avocados.

## Opportunities

- Obtain market access to larger markets
- Country specific opportunities
- Introduction of Australian avocado industry export guidelines
- Demonstrate the industry's sustainability credentials
- Investigate and promote use of new technologies
- More investment in international market development and promotion
- Leveraging an 'Australian' brand.

All challenges and opportunities articulated in the White Paper, and shown above, were confirmed in the consultation process, however, the most pressing issue consistently highlighted was Australia's lack of market access to key target markets.

## Market access

### Current Target Markets Status

<b>Able to access - open markets</b>
Hong Kong, Singapore, Malaysia, Indonesia, UAE, Qatar, UK and European markets
<b>Able to access - protocol market</b>
Japan (Western Australia / South Australia (Pest Free Area))
<b>In negotiation for market access / market access improvement</b>
India, Japan (east coast States), Thailand (Western Australia)
<b>In pool for future market access negotiation</b>
Thailand (east coast States), New Zealand (east coast States), China
<b>Under consideration by IMAAP</b>
South Korea, Vietnam
<b>Not currently being pursued</b>
Philippines, Taiwan

*Status as of 11 May 2022*

### Market access / market access improvement priorities

Based on consultation and analysis, the key market access / market access improvements, in order of priority, are as follows:

- 1) Japan - Market access for all east coast Australian Hass avocados
- 2) India - Market access for all Australian Hass avocados
- 3) New Zealand - Workable protocol in place for Australian Hass avocados (east coast States)
- 4) Thailand - Workable protocol in place for Australian Hass avocados.

## Export Growth Targets

The following table captures export market volume targets based on export market research, market feasibility analysis and the capacity and appetite of the Australian avocado industry to supply the market over the next five years. The required changes in market access or protocol conditions are also noted.

2025/2026 TARGETS				
Country	2020/21 Tonnes	Position / Conditions	2025/26 Tonnes	Estimated mktshare %
<b>Existing markets</b>				
Hong Kong	3,400	Maintain market share	5,000	33%
Singapore	2,633	Maintain market share	5,400	60%
Malaysia	1,680	Maintain market share	3,600	60%
Indonesia	74	Grow	200	
UAE	93	Grow / Target food service with airfreight	500	3%
Qatar	7	Grow / Target food service with airfreight	200	5%
Japan	73	Grow / Workable protocol for all Australian east coast avocados (Hass)	800	1%
Other	200	Maintain	200	0%
		<b>Sub-total</b>	<b>15,900</b>	
<b>Market access or workable protocol possibly in place by 2026</b>				
New Zealand		Grow – winter supply / Workable protocol in place (Hass)	3,000	
Thailand		Grow / Workable protocol in place for all regions (Hass)	750	
India		Grow / Market access and workable protocol in place for all regions (Hass)	1,000	
		<b>Sub-total</b>	<b>4,750</b>	
<b>Other markets (stretch goal)</b>				
United Kingdom		Grow / sea freight only, target premium retail	300	1%
EU (Italy)		Grow / sea freight only, target premium retail	300	1%
		<b>Sub-total</b>	<b>600</b>	
China		Continue to pursue market access.	0	
South Korea		Pursue market access negotiation prioritisation with DAWE.	0	
Vietnam		Market access not likely within 5 years.		
Taiwan		Undertake market research to determine viability of these markets. If viable, submit market access application to IMAAP and pursue market access.	0	
Philippines		Market access not likely within 5 years.		
		<b>TOTAL</b>	<b>21,150</b>	

*Current and indicative 2025/26 targets and objectives by country for Australian avocado exports.*

## Strategy

**Objective: By 2026, Australian avocado exports will reach a minimum 20,000 tonnes at sustainable pricing levels.**

### 1) Market Access and MRL Management Strategy

This strategy aims to address market access, market access maintenance and market access improvement outcomes through R&D, consultation and support, and planning.

Approach	Details / actions	Outcome sought
Support market access, market maintenance and market improvement negotiations for key markets	<ul style="list-style-type: none"> <li>Support government negotiation processes underway as required/ appropriate. (Note: all known research requirements for technical market access for all regions to Japan, India and Thailand have been met as of 15 May 2022).</li> <li>Continue to pursue market access for target countries in the current pool.</li> <li>When relevant, update business case information to inform market access applications.</li> </ul>	<ul style="list-style-type: none"> <li>Successful market access (and workable protocol) for east coast Australian Hass avocados to Japan and all Australian avocados to India</li> <li>Workable protocol in place for all Australian Hass avocados to Thailand</li> </ul>
Undertake research for improved market access or market maintenance or market improvement	<ul style="list-style-type: none"> <li>For New Zealand, requirements for avocado sun blotch viriod (ASBVd) and <i>Pseudocercospora purpurea</i> to be confirmed and completed. Support government negotiation processes as required/ appropriate once complete.</li> </ul>	<ul style="list-style-type: none"> <li>Workable protocol in place for Australian (or Qld and NSW avocado (Winter window)) Hass avocados to New Zealand</li> </ul>
	<ul style="list-style-type: none"> <li>Investigate improved cold treatment (higher temperatures) for conditional non-host status for a range of fruit flies in Hass</li> </ul>	<ul style="list-style-type: none"> <li>If feasible, seek market improvement in existing markets</li> </ul>
	<ul style="list-style-type: none"> <li>Explore any alternative technology to support workable market access protocols</li> </ul>	<ul style="list-style-type: none"> <li>Identify and utilise any available and viable technology that can support workable market access</li> </ul>
	<ul style="list-style-type: none"> <li>Investigate market access requirements for the Philippines, Taiwan, USA and Canada in more detail.</li> </ul>	<ul style="list-style-type: none"> <li>Report on likely market access requirements for the markets</li> </ul>
Develop MRL management plans to support export trade	<ul style="list-style-type: none"> <li>For key markets understand the implications of current and future MRL requirements. Develop suitable country specific MRL management plans incorporating production or postharvest modifications or alternate solutions.</li> <li>As a priority, investigate MRL management requirements for Japan, India, New Zealand, Thailand, UK and Europe.</li> <li>Develop a long-term industry strategy to manage on-going issues (likely in consultation with broader regulatory and horticulture sector)</li> </ul>	<ul style="list-style-type: none"> <li>MRL management plan in place for Japan and other target markets where required</li> <li>Investigation into prospective markets completed.</li> <li>Long term strategy developed for industry.</li> </ul>



## 2) Export Supply Strategy

This strategy aims to secure appropriate supply to meet export market requirements

Approach	Details / actions	Outcome sought
Provide the best quality export avocado to meet customer expectations and price points	<ul style="list-style-type: none"> <li>Develop Australian avocado industry export guidelines – incorporating minimum quality standards and market access protocols and MRL requirements</li> </ul>	<ul style="list-style-type: none"> <li>Better quality outcomes and customer experience, less waste</li> <li>More protocol compliant fruit available for export markets</li> <li>Confidence in utilising more challenging supply chains</li> </ul>
Focus on continuity of supply and productivity improvements at farm level to meet market competitiveness challenges	<ul style="list-style-type: none"> <li>Research to understand and manage irregular bearing</li> <li>Support growers to increase productivity (reduce unit cost of product) through best practice management,</li> <li>Investigate and promote new technologies that can support productivity / quality outcomes gains (in line with domestic strategy)</li> <li>Maintain BPR Export Modules</li> </ul>	<ul style="list-style-type: none"> <li>Growers have access to information to support practice change</li> <li>Reduce cost of production (to support business profitability)</li> </ul>
Take a proactive approach to address sustainability issues	<ul style="list-style-type: none"> <li>Investigate methods to quantify Australian production methods to add value to export product offering (consider Hort Innovation Sustainability Framework and competitor positions)</li> <li>Support growers to drive change in production systems where weaknesses are evident.</li> </ul>	<ul style="list-style-type: none"> <li>Identify opportunities to quantify aspects of Australian avocado production that supports product positioning</li> <li>Growers and supply chains take measures to demonstrate the performance of their businesses</li> </ul>
Support improved supply chain practices that facilitate improved quality and competitiveness	<ul style="list-style-type: none"> <li>Support the export supply chain to help deliver a high quality, more competitive product as a result of supply chain practices</li> <li>Investigate and promote adoption of new technologies, packaging, traceability systems etc. that support Australia's avocado offering</li> </ul>	<ul style="list-style-type: none"> <li>Supply chain businesses have access to information to support practice change</li> <li>Reduce cost of production (to support business profitability)</li> <li>Confidence in utilising more challenging supply chains e.g. shipping times (UK/EU), cold treatment protocol chains</li> </ul>

### 3) Export Demand Strategy

This strategy aims to build demand for Australian avocados and maintain a premium price position over competitors in key target markets

Approach	Details / actions	Outcome sought
Leverage Australia's market position through better market insight	<ul style="list-style-type: none"> <li>Undertake in-depth market research in key markets to understand Australian and competitor performance and Australia's Unique Selling Proposition to best position Australian avocados in key markets</li> </ul>	<ul style="list-style-type: none"> <li>Well informed and targeted industry (and commercial) marketing plans</li> </ul>
Defend, maintain or grow market demand in existing and new markets	<ul style="list-style-type: none"> <li>Develop and execute an Australian Avocado Export Marketing Strategy, with country-specific strategies, utilising above market research and exporter insights.</li> <li>Target food service and retail channels as appropriate through trade and consumer marketing activities</li> <li>Develop appropriate marketing collateral to support these activities</li> </ul>	<ul style="list-style-type: none"> <li>Defend market positions – Singapore, Malaysia</li> <li>Maintain market position– Hong Kong</li> <li>Grow market position – other / new markets</li> </ul>
Leverage the 'Australia' brand	<ul style="list-style-type: none"> <li>Support exporters to leverage the 'Australia' brand to align with industry activities if they choose</li> </ul>	<ul style="list-style-type: none"> <li>Increase visibility of Australian avocados in export markets</li> </ul>
Build demand through trade networking	<ul style="list-style-type: none"> <li>Organise / encourage participation in trade shows, outbound and inbound trade missions to existing and new markets to build demand for Australian product. (Note: focus for trade missions should be on new and prospective markets such as Japan, India, Thailand)</li> </ul>	<ul style="list-style-type: none"> <li>Extended trade networks to support trade outcomes</li> </ul>
Identify and investigate other potential export markets	<ul style="list-style-type: none"> <li>Investigate UK, EU, Philippines, Taiwan, USA and Canada (if market access and/or MRL conditions can be met) to understand demand for Australian product (and market competitiveness, market acceptance, shipping times etc.). If appropriate develop business case for submission to IMAAP</li> </ul>	<ul style="list-style-type: none"> <li>Report on potential of identified markets.</li> <li>IMAAP business case submission (if viable)</li> </ul>
Extend crisis management plan	<ul style="list-style-type: none"> <li>Extend crisis management plan to manage any adverse events that may impact the reputation and demand for Australian avocados in export markets e.g. food safety issues, MRL breaches.</li> </ul>	<ul style="list-style-type: none"> <li>Good contingency planning to protect industry</li> </ul>

#### 4) Capacity Building Strategy

The aim of this strategy is to ensure Australian growers and their supply chains have the knowledge, information and resources to be able to deliver a successful Australian avocado export program

Approach	Details / actions	Outcome sought
Ensure growers and the supply chain have required information and support to deliver the best product	<ul style="list-style-type: none"> <li>• Support and promote adoption of export guidelines across industry</li> <li>• Extend R&amp;D and other information that supports fruit quality management, MRL and protocol compliance so growers are export ready</li> <li>• Maintain MRL information app</li> <li>• Maintain relevant information on the Industry BPR for export stakeholders</li> <li>• Develop specific trade education program to support importers, retailers, food service businesses in the management of Australian avocados</li> <li>• Leverage in-market support where available and appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Easy access to information</li> <li>• Improved quality, increased volume of compliant/acceptable fruit for export markets</li> <li>• Importer and retailer confidence in Australian fruit and general management of category</li> </ul>
Ensure growers and the supply chain have required market understanding	<ul style="list-style-type: none"> <li>• Develop and maintain strong networks in export countries <ul style="list-style-type: none"> <li>◦ Maintain database of key contacts and service providers</li> </ul> </li> <li>• Undertake export market study tours for growers and supply chain (aligned with trade shows or other activities / focus on new markets)</li> <li>• Provide / facilitate briefings on country-specific issues</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledgeable grower and supply chain</li> <li>• Developed networks to support market development</li> </ul>
Provide the best available information to inform decision making	<ul style="list-style-type: none"> <li>• Communicate this Strategy to all relevant stakeholders</li> <li>• Maintain / develop existing data sources that support export programs (i.e. industry production and supply data, export data)</li> <li>• Seek other sources of information / intelligence to support export development</li> <li>• Maintain a record of new or pending market access of competitor countries to inform market development / marketing activities</li> </ul>	<ul style="list-style-type: none"> <li>• Well informed industry</li> </ul>
Support for technical market access, trade negotiations with strategic information	<ul style="list-style-type: none"> <li>• Continue to inform and consult with key parties regarding technical market access, trade negotiation and other international regulation that impacts the success of Australian avocado export.</li> <li>• Where possible, support initiatives that provide improved capacity and outcomes in this area</li> <li>• Support inbound official visits and consider inbound study tours where there may be value for the industry</li> <li>• Participate in key industry and government forums e.g. HEICC</li> </ul>	<ul style="list-style-type: none"> <li>• Well informed government, technical staff and researchers and aligned decision makers</li> <li>• Well informed industry</li> </ul>

## Appendices

### Appendix 1: Market demand / feasibility matrix

The following matrix shows current exports (2021) by Volume, Value and Unit Value (A\$ per kilogram) for current and potential future export markets. A summary of export objectives and focus areas where the Australian avocado industry should concentrate their efforts over the next 5 years. Target Volumes and indicative Values are Unit Values for 2026 are also provided for each target country, as well as expected overall import volumes (Market Volume) that each market will likely absorb in 2026. This data is based on analysis and trends in each of the identified markets.

Note: In the matrix, the target Unit Values in 2026 are expressed as CIF (Cost Insurance and Freight) values rather than FOB (Free On Board) values. This is because CIF values are an official record of the landed value of goods (including insurance and freight) imported for each country. CIF values also reflect the state of the market from a competitive position and provide guidance as to the price points that are expected/achievable in the market. To determine the FOB value from the CIF value, freight and insurance costs can be deducted. These costs will vary depending on many factors, but the most pronounced will be the difference in sea versus air freight costs.

Market	2021 exports			Objectives / Focus	2026 exports Target			Market Volume	Market share
	Volume	Value	Unit Value		Volume	Value	Unit Value		
	Tonnes	Million AUD	A\$ per kg FOB		Tonnes	Million AUD	A\$ per kg CIF	Tonnes	
Hong Kong	3,401	16.68	\$4.91	Build market share to 33%	5,000	26.25	\$5.25	15,000	33%
Singapore	2,633	12.28	\$4.66	Hold Market share at 60% while driving market growth	5,400	28.35	\$5.25	9,000	60%
Malaysia	1,680	7.23	\$4.30	Hold Market share at 60% while driving market growth	3,600	18.90	\$5.25	6,000	60%
Indonesia	74	0.50	\$6.78	Target 200 tonnes in premium retail	200	1.40	\$7.00	300	67%
<b>Sub Total</b>	<b>7,788</b>	<b>36.70</b>	<b>\$4.71</b>		<b>14,200</b>	<b>74.90</b>	<b>\$5.27</b>	<b>30,300</b>	<b>46.9%</b>
Japan	73	0.40	\$5.43	build market share to 1 % specific retail target	800	4.00	\$5.00	-	1%
China	no access	0.00		market access unlikely within 5 years	0	0.00	\$4.00	60,000	0%
South Korea	no access	0.00		market access unlikely within 5 years	0	0.00	\$4.00	30,000	0%
Thailand	no access	0.00		regain access for WA and Qld promote in retail	750	4.50	\$6.00	3,000	25%
Taiwan	no access	0.00		market access unlikely within 5 years	0	0.00	\$6.50	2,500	0%
India	no access	0.00		pursue access and target a city food service and retail	1,000	4.50	\$4.50	2,000	20%
Philippines	no access	0.00		not viable in 5 years	0	0.00	\$6.00	50	0%
New Zealand	no access	0.00		pursue access and target off season (Apr - July)	3,000	18.00	\$6.00	9,000	33%
Vietnam	no access	0.00		not viable in 5 years	0	0.00	\$5.25	100	0%
<b>Total Access Targets</b>	<b>0</b>	<b>0.40</b>			<b>5,550</b>	<b>31.00</b>	<b>\$5.59</b>	<b>186,650</b>	<b>3.0%</b>
United Arab Emirates	93	0.33	\$3.60	target food service with air freight	500	3.00	\$6.00	20,000	3%
Qatar	7			target food service with air freight	200	1.00	\$5.00	4,000	5%
Turkey	0			not viable in 5 years	0	0.00	\$1.50	5,000	0%
Italy	0			target premium retail with sea freight	300	1.50	\$5.00	30,000	1%
United Kingdom	0			target premium retail with sea freight in Peru off season	300	1.35	\$4.50	120,000	0%
<b>Total Others</b>	<b>100</b>	<b>0.33</b>	<b>\$3.36</b>		<b>1,300</b>	<b>6.85</b>	<b>\$5.27</b>	<b>170,452</b>	<b>0.8%</b>
all Other	190	1.05	\$5.54	Maintain Pacific Island trade	200	1.10	\$5.50	2,709,081	
<b>TOTAL</b>	<b>8,078</b>	<b>38.09</b>	<b>\$4.71</b>		<b>21,250</b>	<b>113.85</b>	<b>\$5.36</b>	<b>3,042,000</b>	<b>0.7%</b>

Appendix 2: Updated White Paper (noted as amended) – separate attachment - available on request

Appendix 3: Detailed market data analysis (Fresh Intelligence Consulting) - separate attachment – available on request

#### Appendix 4: Consultation Process

- 1) Call for industry stakeholders to register to be part of the consultation process
- 2) Development, review by Project Reference Group, and dissemination of White Paper (April 2022)
- 3) One-on-one interviews with key stakeholders (April / May 2022)
- 4) Online survey and/or request for feedback from registered industry stakeholders (April 2022)
- 5) Presentation at Export Forums (Bundaberg 4 March 2022, Western Australia 10 May 2022, South Australia 13 May 2022)
- 6) Development, review by Project Reference Group, and dissemination of draft Strategy document (May 2022)
- 7) Feedback on Draft Strategy requested from registered stakeholders (May/June 2022)
- 8) Webinar with registered stakeholders to provide additional information (May 2022)
- 9) Presentation at Avo Connections (Brisbane) (June 2022).
- 10) Final Strategy, reviewed by Project Reference Group, submitted to Hort Innovation (20 June 2022).

#### Appendix 5: Project team

John Tyas (CEO - Avocados Australia), Flora Zhang (Export Manager – Avocados Australia), Jenny Margetts (P2P Business Solutions), Noel Shield (Consultant), Wayne Prowse (Fresh Intelligence Consulting), Garry Goucher (G.Goucher & Associates)

#### Appendix 6: Project Reference Group

Antony Allen (The Avolution), Cormac te Kloot (Costa Group), Sophie Cremasco (The Avocado Collective), Joe Lyons (Lyons Farming / Chair – Bundaberg Fruit & Veg Growers), Joe Saina (Chair - Australian Horticultural Exporters & Importers Association (AHEIA) / AS Barr), Mimi Doan (Hort Innovation), Sue Viana (Hort Innovation) + John Tyas, Flora Zhang and Jenny Margetts.