



Facts at a Glance 2016/17 for the Australian avocado industry

Key statistics of the Australian avocado industry
Data current at August 2017



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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.

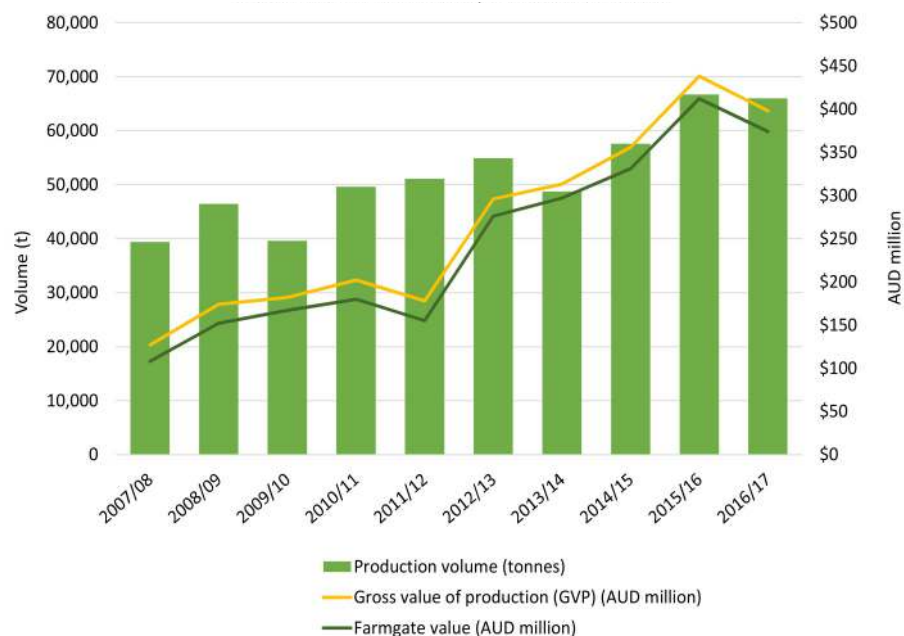
Data source is Infocado unless otherwise stated. Infocado is the data collection platform from which avocado supply and forecast volumes are reported. The production of these reports is currently funded through AV16006. See <http://www.avocado.org.au/our-programs/supply-chain-data/infocado/> for more information.

Consumption is estimated using total supply volume divided by Australian population (based on ABS data).

Report version updated 09 March 2018.

Avocado production and value

Australian annual avocado production and value



Australia produced almost 66,000 tonnes of avocados in 2016/17, which was slightly less (1%) than the previous year. The gross value of production (GVP) for Australian avocados was estimated at \$398 million.

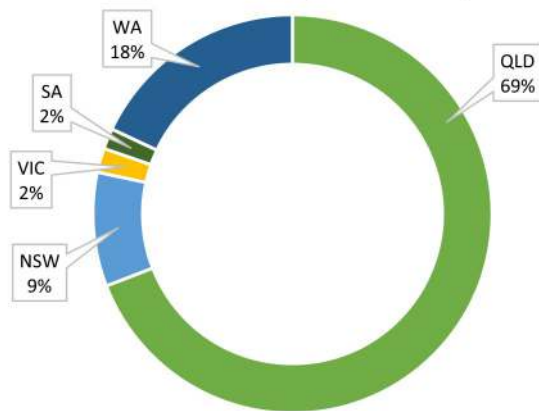
Australian avocado production

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)
2007/08	39,394	7,162,546	\$ 127	\$ 108	\$ 326	\$ 4.2
2008/09	46,446	8,444,728	\$ 174	\$ 152	\$ 462	\$ 6.0
2009/10	39,641	7,207,501	\$ 182	\$ 167	\$ 426	\$ 6.2
2010/11	49,612	9,020,281	\$ 202	\$ 180	\$ 498	\$ 7.3
2011/12	51,113	9,293,315	\$ 178	\$ 155	\$ 461	\$ 8.1
2012/13	54,877	9,977,567	\$ 296	\$ 276	\$ 661	\$ 8.1
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

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

Avocado production by state

Avocado production by state 2016/2017



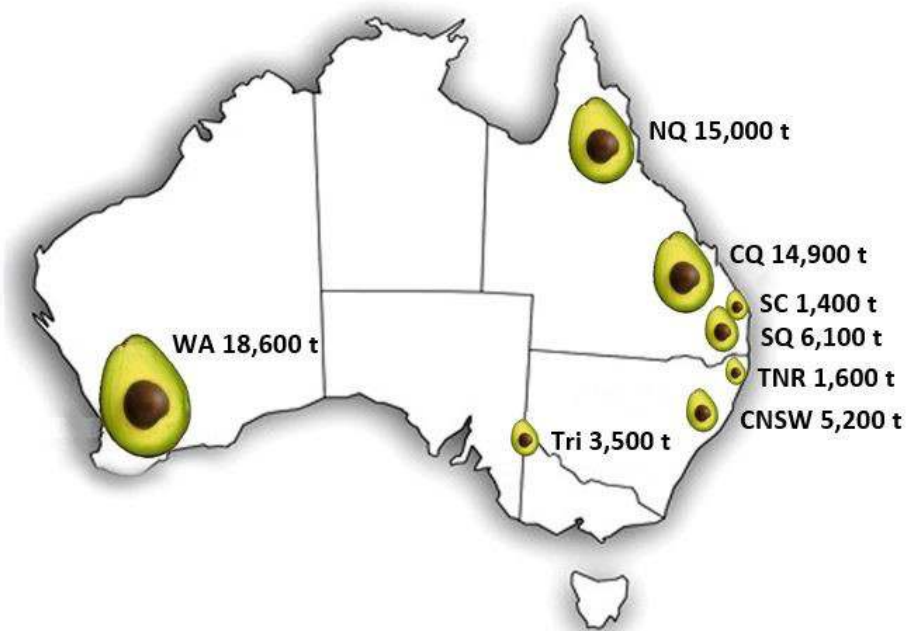
Queensland continues to produce the majority of Australian avocados, with 69% of production. Western Australia produced the next largest share at 18%.

Avocado production by state (tonnes)

Year	Qld	NSW	Vic/Tas	SA	WA/NT	Total
2007/08	31,416	4,385	55	484	3,053	39,394
2008/09	33,179	5,456	120	248	7,443	46,446
2009/10	32,484	3,203	62	167	3,724	39,641
2010/11	40,654	4,009	77	210	4,661	49,612
2011/12	40,665	4,012	186	1,931	4,319	51,113
2012/13	29,294	3,116	119	956	21,392	54,877
2013/14	35,602	5,601	770	719	6,024	48,715
2014/15	28,703	4,286	1,106	913	22,587	57,595
2015/16	32,374	8,305	1,646	1,429	22,961	66,716
2016/17	45,608	6,108	1,296	1,105	11,875	65,992

Avocado regions in Australia

Annual tonnes produced in each region averaged over two years*: 2015/16 and 2016/17



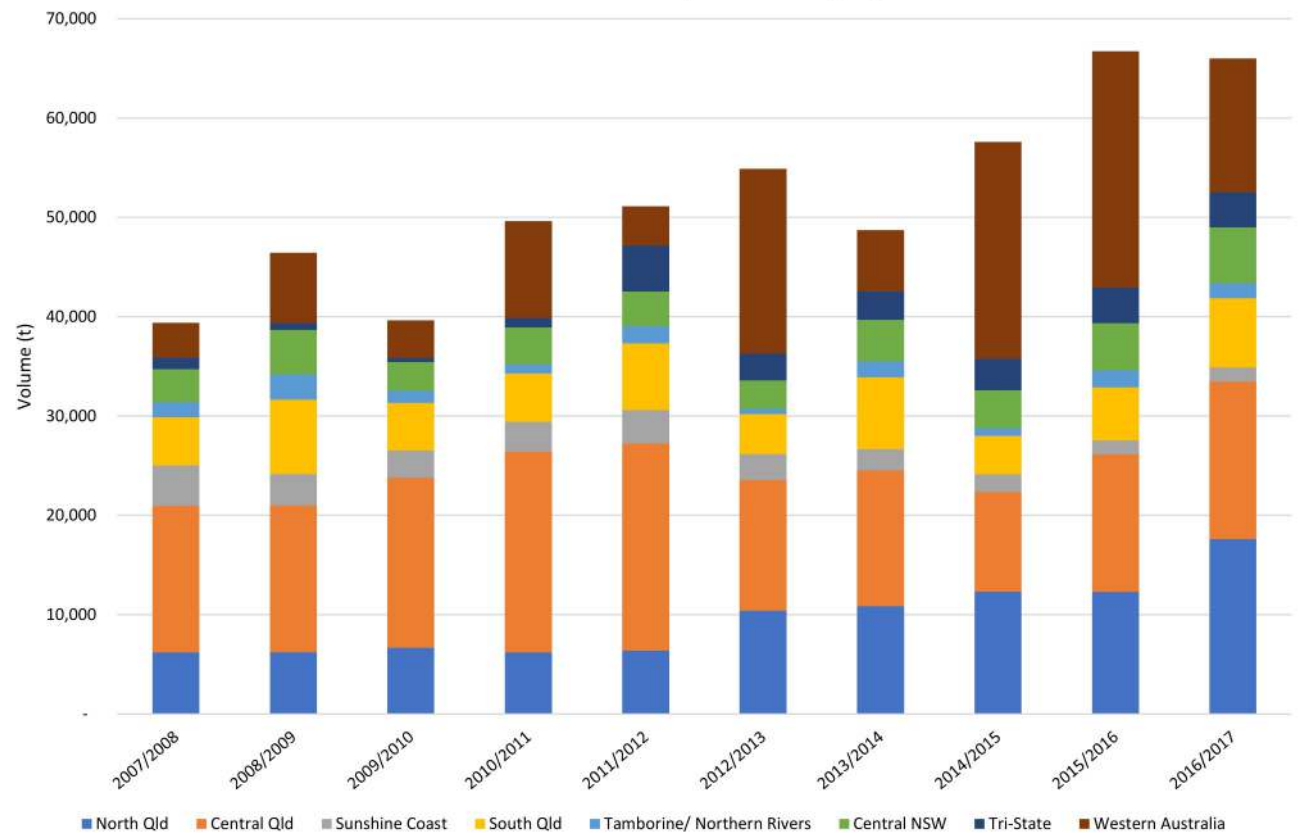
* A two-year average is used to compare production by region, because some regions have irregular bearing years, meaning crop load may vary significantly from year to year.

State/s	Region
Queensland	North Queensland (NQ)
	Central Queensland (CQ)
	Sunshine Coast (SC)
	South Queensland (SQ)
Queensland & New South Wales	Tamborine / 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)

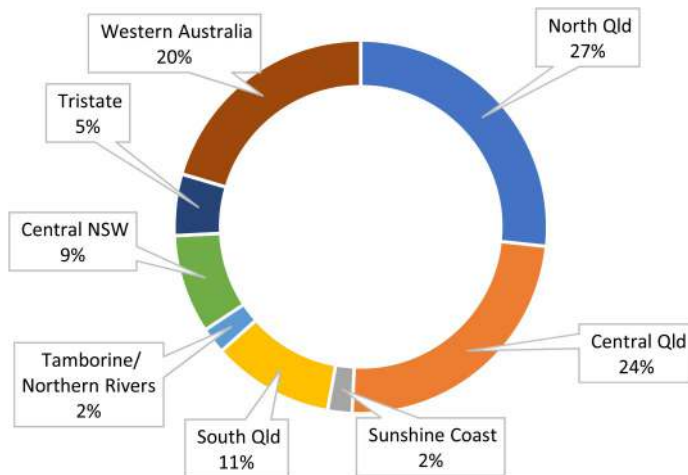
Australia's avocado production is divided into regions which have similar growing conditions and seasons. Some regions cross state boundaries. On average across 2015/16 and 2016/17, production has mostly come from the Queensland regions (59%) and Western Australia (26%).

Avocado production by region

Australian annual avocado production by region



Avocado production by region 2016/2017



Avocado production by region

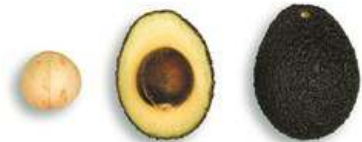
Production in Central Queensland shows continued signs of recovery from the flooding events of 2011 and 2013, producing 24% of the nation's avocados in 2016/2017. Western Australian production has continued to increase significantly, albeit with some 'off years'. North Queensland production continues to grow steadily.

Year	North Qld	Central Qld	Sunshine Coast	South Qld	Tamborine Northern Rivers	Central NSW	Tristate	Western Australia	Total
2007/08	6,205	14,757	4,082	4,841	1,509	3,309	1,180	3,510	39,394
2008/09	6,227	14,783	3,160	7,456	2,567	4,475	710	7,069	46,446
2009/10	6,667	17,105	2,766	4,779	1,220	2,914	394	3,797	39,642
2010/11	6,211	20,210	3,000	4,864	890	3,748	974	9,715	49,612
2011/12	6,378	20,870	3,337	6,738	1,743	3,462	4,668	3,917	51,113
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
2016/17 % by region	27 %	24 %	2 %	11 %	2 %	9 %	5 %	20 %	
Past 2yr average % by region	23 %	22 %	2 %	9 %	2 %	8 %	5 %	28 %	

Avocado supply periods by region

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	■	■	■					■	■	■	■	■



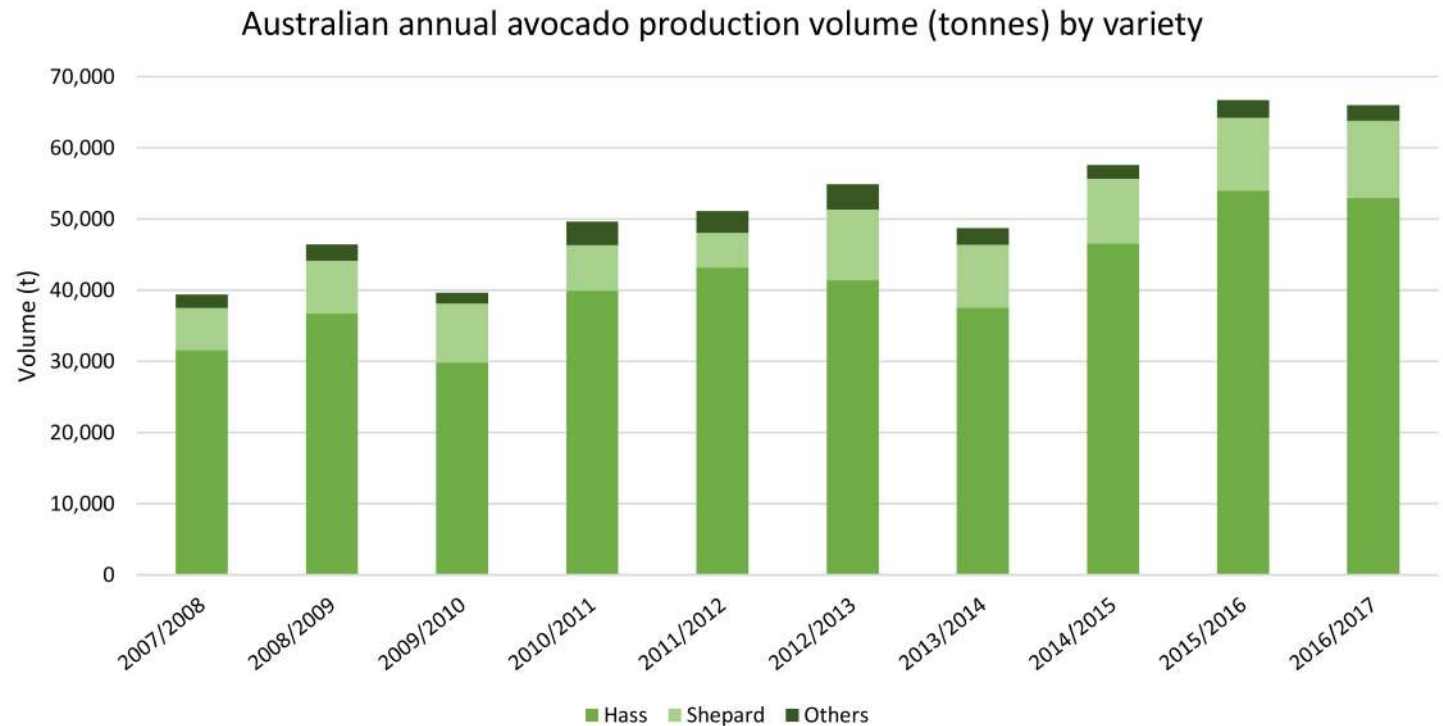
Hass Avocado



Shepard Avocado

Avocado production by variety

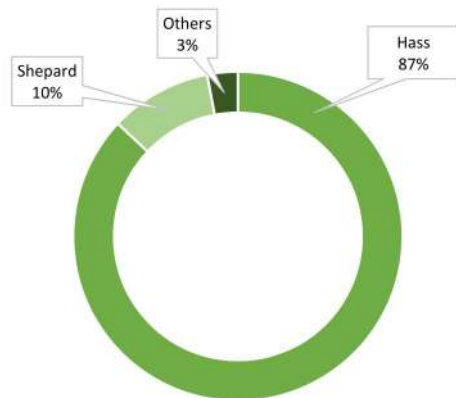
In Australia, avocados are produced almost all year round due to the range of climates and conditions in our eight major avocado growing regions. Hass is the main avocado variety, and is produced almost all year round. In 2016/17 Hass represented 87% of production. Shepard, which is grown in Queensland through late Summer and Autumn, made up 10% of production, and at that time of year, is the dominant Australian variety on the market.



Avocado production by variety

Production by variety in 2016-2017	
Variety	Production (%)
Hass	87.270%
Shepard	10.499%
Lamb Hass	0.678%
Reed	0.638%
Sharwil	0.244%
Gwen	0.220%
Wurtz	0.201%
Fuerte	0.123%
Unnamed	0.098%
Pinkerton	0.013%
Gem	0.012%
Bacon	0.004%
Edrinol	0.001%

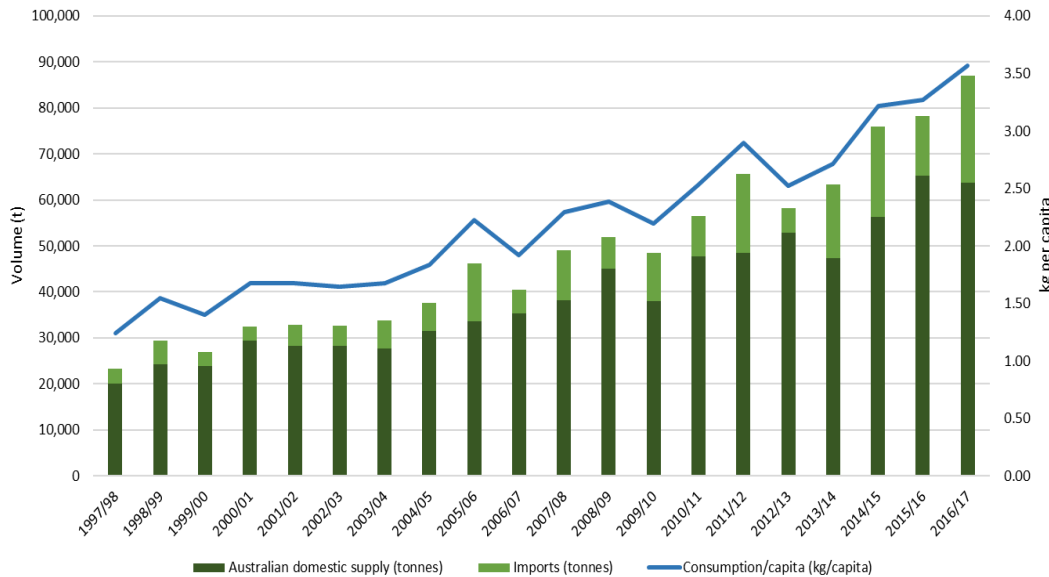
Australian avocado production by variety 2016/17



Production by Variety (tonnes)				
Year	Hass	Shepard	Other	Total
2007/08	31,578	5,933	1,883	39,394
2008/09	36,669	7,450	2,327	46,446
2009/10	29,790	8,353	1,498	39,641
2010/11	39,913	6,418	3,280	49,612
2011/12	43,155	4,923	3,035	51,113
2012/13	41,398	9,923	3,556	54,877
2013/14	37,513	8,882	2,320	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

Australian consumption of avocado

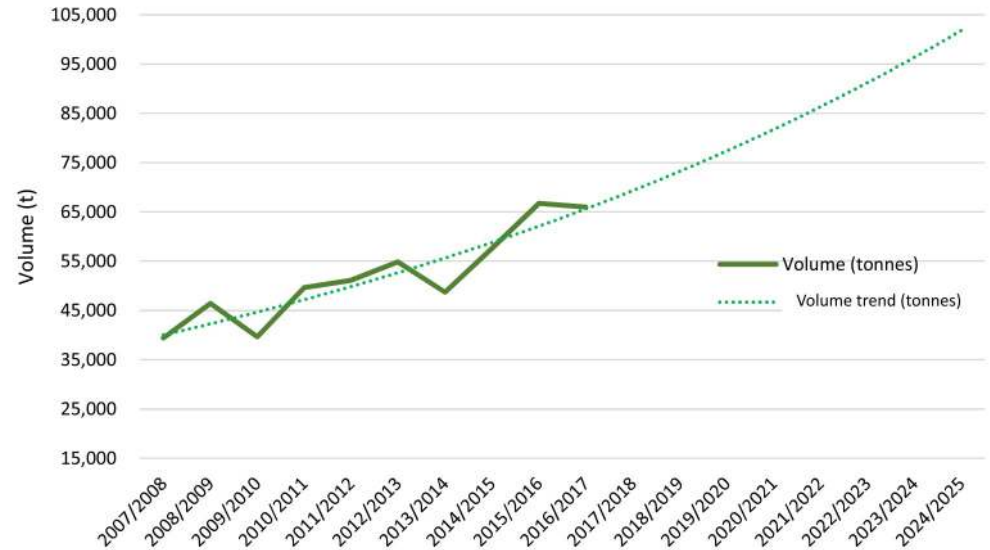
Australian annual domestic avocado supply, NZ imports and Australian per capita consumption



Sources: Infocado, IHS Global Trade Atlas (2017) and population based on ABS data

Australians' love of avocados grows steadily each year. Consumption in 2016/17 reached just over 3.5kg per person. Imported New Zealand fruit supplements Australian supply during their harvest season during Spring and Summer.

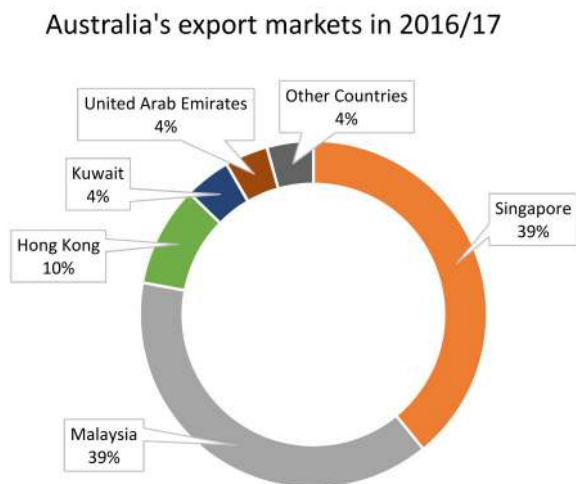
Australian avocado past ten years production with forecast trend to 2025



Sources: Infocado, Avocados Australia analysis

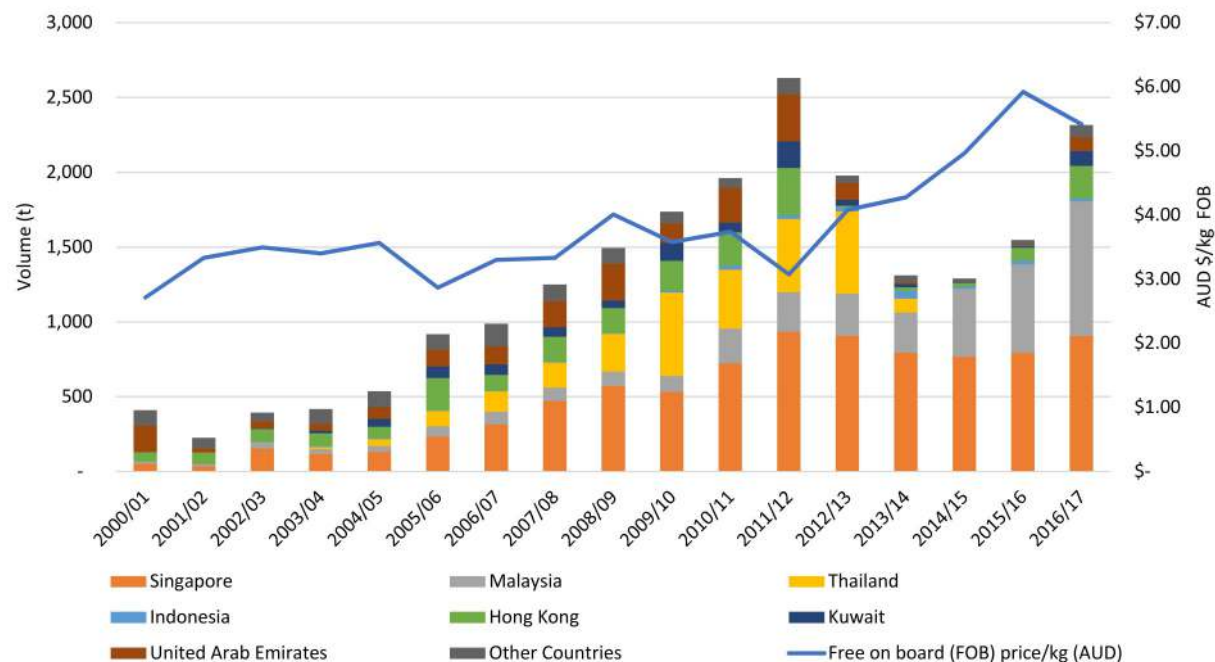
Australian production is forecast to increase strongly over the next few years, with 100,000 tonne per annum expected to be produced by 2025.

Australian avocado export markets



Source: IHS Global Trade Atlas (2017)

Australian annual avocado export volumes in tonnes by country and AUD \$/kg FOB (blue line)



Source: IHS Global Trade Atlas (2017)

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 with Malaysia and Singapore currently Australia's main avocado export markets. In 2016/17 Australia exported over 2,300 tonnes of avocados, a one-third increase on the previous year, approaching the highest exports previously recorded in 2011/12.