



Facts at a Glance **2019/20** **for the Australian** **avocado industry**

Key statistics of the Australian avocado industry
Data current at September 2020



Hort
Innovation
Strategic levy investment

AVOCADO
FUND

Avocados Australia

Phone: (61) 07 3846 6566 or toll free 1300 303 971

Fax: (61) 07 3846 6577 or toll free 1300 303 972

General enquiries: admin@avocado.org.au

Media enquiries: co@avocado.org.au

Online

www.avocado.org.au

www.facebook.com/AvocadosAustralia

<https://twitter.com/AvocadosAu>

Copyright © Hort Innovation 2020

Horticulture Innovation Australia Limited (Hort Innovation) makes no representations and expressly disclaims all warranties (to the extent permitted by law) about the accuracy, completeness, or currency of information in *Avocado industry market data capture and analysis* (AV20000).

Reliance on any information provided by Hort Innovation is entirely at your own risk. Hort Innovation is not responsible for, and will not be liable for, any loss, damage, claim, expense, cost (including legal costs) or other liability arising in any way, including from any Hort Innovation or other person's negligence or otherwise from your use or non-use of *Avocado industry market data capture and analysis* (AV20000), or from reliance on information contained in the material or that Hort Innovation provides to you by any other means.

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.

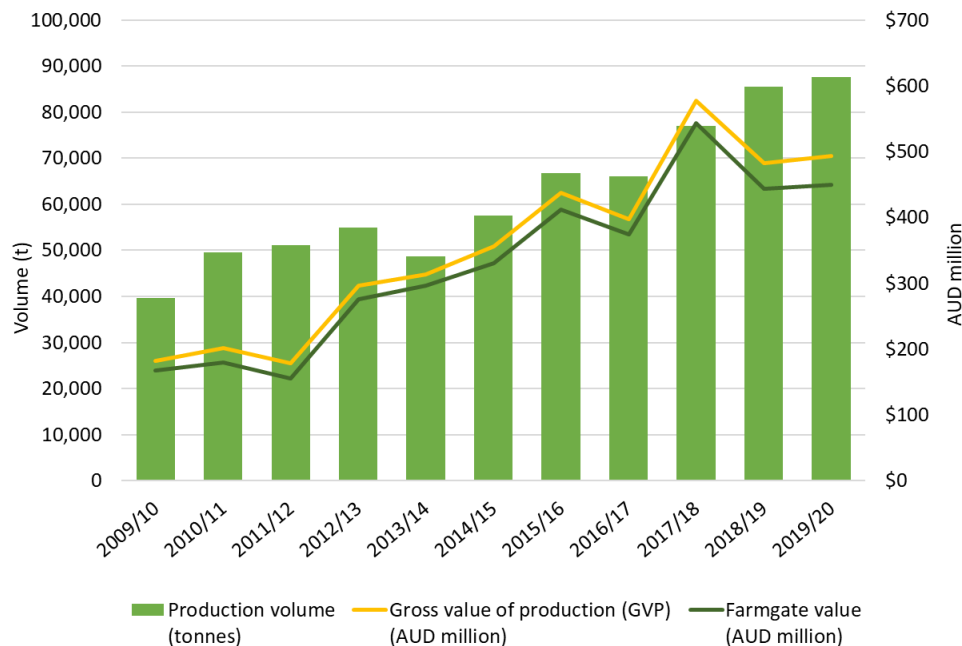
**Hort
Innovation**
Strategic levy investment

**AVOCADO
FUND**

This report has been produced as part of the strategic levy investment project *Avocado industry market data capture and analysis* (AV20000), part of the Hort Innovation Avocado Fund. It 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.

Avocado production and value

Australian annual avocado production and value



Sources: Infocado; AusMarket Consultants; Freshlogic; IHS Global Trade Atlas (2020)

Australia produced just over 87,546 tonnes of avocados in 2019/20, which was 2% more than the previous year. The gross value of production (GVP) for Australian avocados was estimated at \$493 million.

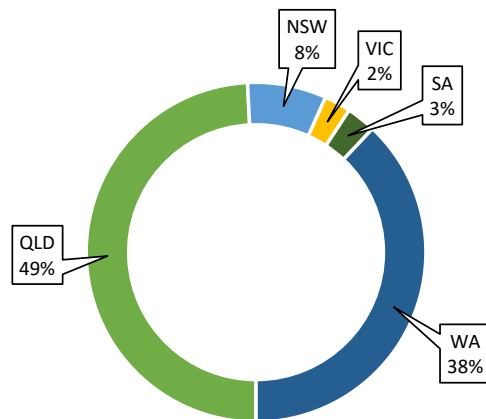
Australian avocado production

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)
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
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

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
2019/2020



Queensland continues to produce the majority of Australian avocados, with 49% of production. Western Australia produced the next largest share at 38%.

Avocado production by state (tonnes)

Year	Qld	NSW	Vic/Tas	SA	WA/NT	Total
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
2017/18	47,669	6,964	1,947	1,215	19,236	77,032
2018/19	47,167	12,202	225	828	25,123	85,546
2019/20	43,069	6,587	2,203	2,448	33,239	87,546

Avocado regions in Australia

Annual tonnes produced in each region averaged
over two years*: 2018/19 and 2019/20

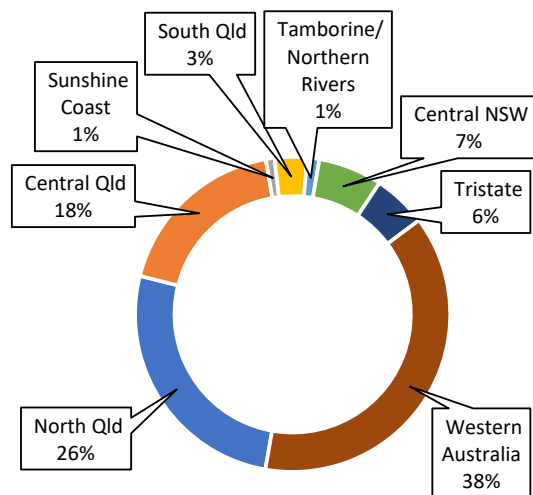


* A two-year average is used to compare production by region, because some regions have irregular bearing years, meaning crop load may vary significantly from year to year.

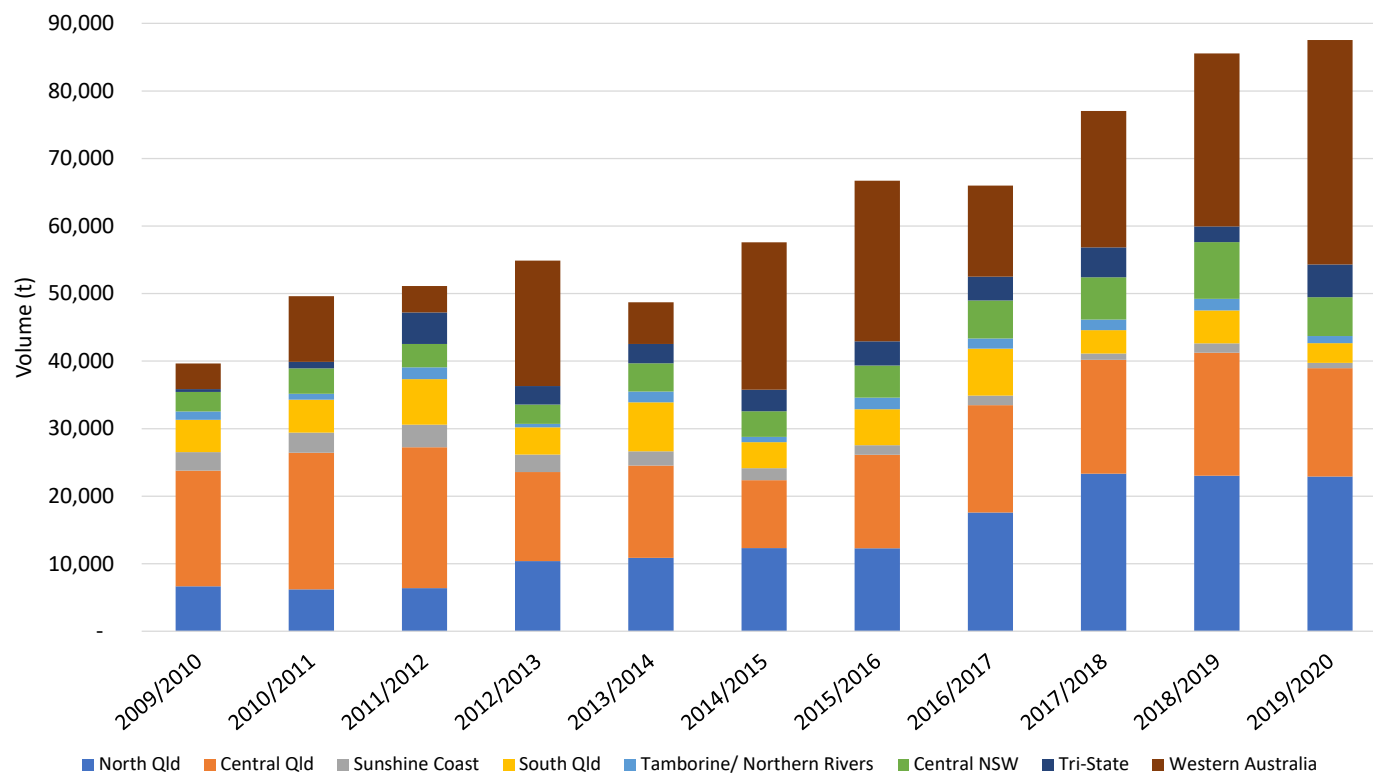
State/s	Region
Queensland	North Queensland (NQ)
	Central Queensland (CQ)
	Sunshine Coast (SC)
	South Queensland (SQ)
Queensland & New South Wales	Tambrone / Northern Rivers (TNR)
New South Wales	Central New South Wales (CNSW)
New South Wales, Victoria, South Australia & Tasmania	Tristate (Tri)
Western 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 2018/19 and 2019/20, production has mostly come from the Queensland regions (52%) and Western Australia (34%).

Avocado production by region



Avocado production by region 2019/2020



Avocado production by region

For FY2019-20, supply for most regions declined respective to the previous year, except for Tristate and Western Australia.

Tristate doubled last financial year's output returning to its pre-FY2018-19 trend. Western Australia exceeded its previous year's output by over 7,600 tonnes (+30%).

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
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
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
2019/20 % by region	26 %	18 %	1 %	3 %	1 %	7 %	6 %	38 %	
Past 2yr average % by region	27 %	20 %	1 %	5 %	2 %	8 %	4 %	34 %	

Avocado supply periods by region



Hass Avocado



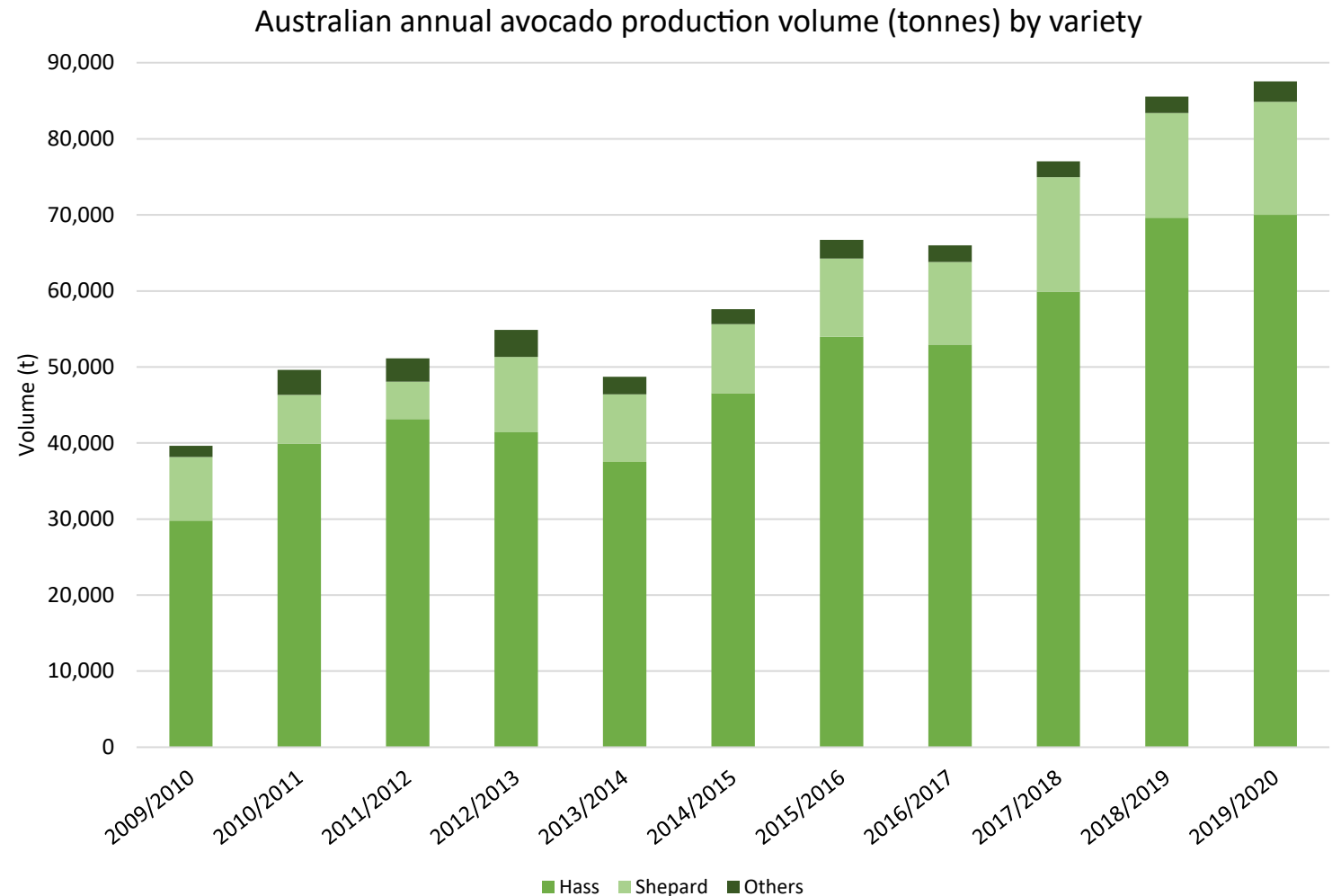
Shepard Avocado

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

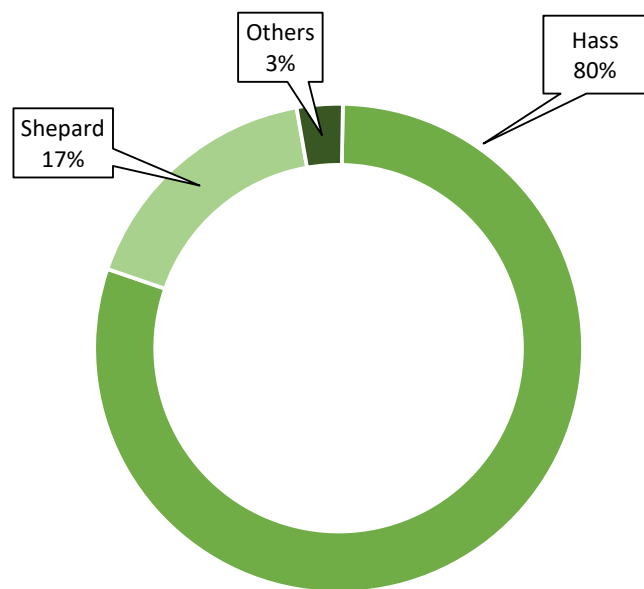
In Australia, avocados are produced almost all year round due to the range of climates and conditions in our eight major avocado growing regions.

Hass is the main avocado variety, and is produced almost all year round. In 2019/20 Hass represented 80% of production. Shepard, which is harvested in Queensland through late Summer and Autumn, made up 17% of production, and at that time of year, is the dominant Australian variety on the market.



Avocado production by variety

Australia's avocado production by variety in 2019/20

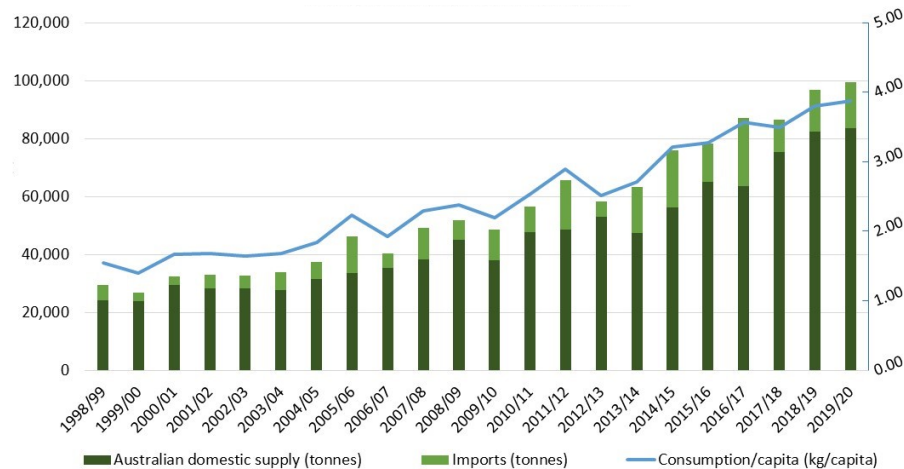


The three percent of fruit which is not Hass or Shepard is made up of the following varieties, listed in order of volume produced: Lamb Hass, Reed, Wurtz, Gwen, Sharwil, Fuerte, Pinkerton, Gem, and Bacon.

Production by Variety (tonnes)				
Year	Hass	Shepard	Other	Total
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
2017/18	59,870	15,085	2,077	77,032
2018/19	69,615	13,775	2,157	85,546
2019/20	70,016	14,875	2,655	87,546

Australian consumption of avocado

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



Sources: Infocado, IHS Global Trade Atlas (2020) and population based on ABS data

Australia avocado consumption in 2019/20 was 3.88kg per person. Imported New Zealand fruit supplements Australian supply during their harvest season during Spring and Summer.

Australian production forecast trend (tonnes)

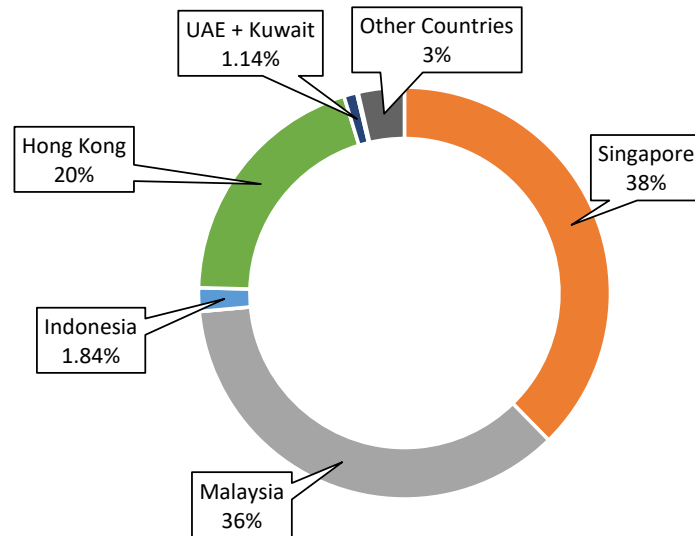


Sources: Infocado, Avocados Australia analysis

Australian production is forecast to increase strongly over the next few years, with at least 115,000 tonnes per annum expected to be produced by 2025.

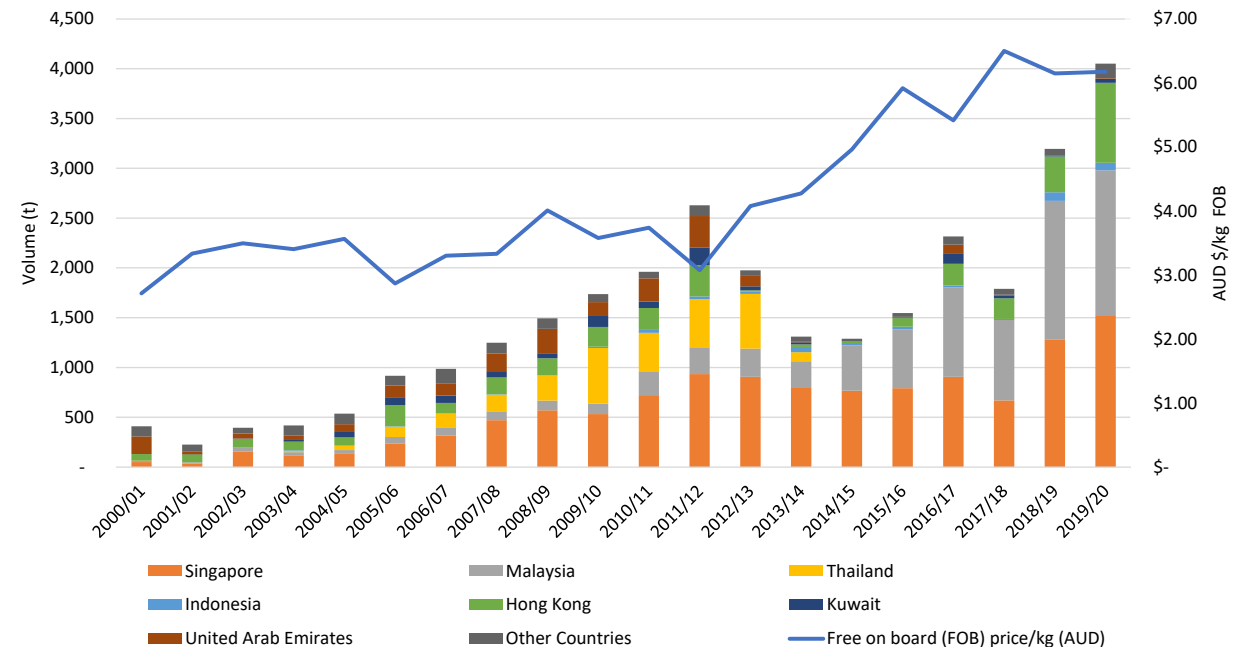
Australian avocado export markets

Australia's export markets in 2019/20



Source: IHS Global Trade Atlas (2020)

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



Source: IHS Global Trade Atlas (2019)

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 2019/20 Australia exported 4,051 tonnes, its highest volume of fresh avocados to date, representing 4.63% of the 87,546 tonnes produced in Australia.