



Facts at a Glance **2018/19** **for the Australian** **avocado industry**

Key statistics of the Australian avocado industry
Data current at September 2019



Hort
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AVOCADO
FUND

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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 AV16006. See <http://www.avocado.org.au/our-programs/supply-chain-data/infocado/> for more information.

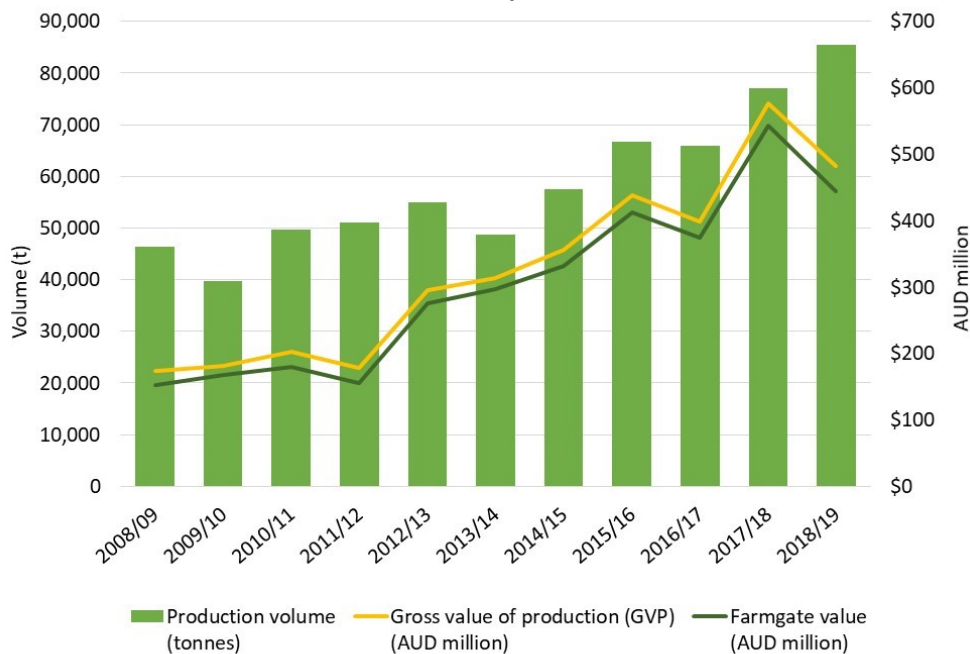
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This report has been produced as part of the strategic levy investment project *Avocado industry market data capture and analysis* (AV16006), part of the Hort Innovation Avocado Fund. It is funded by Hort Innovation, using the avocado research and 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



Australia produced just over 85,546 tonnes of avocados in 2018/19, which was 11% more than the previous year. The gross value of production (GVP) for Australian avocados was estimated at \$483 million.

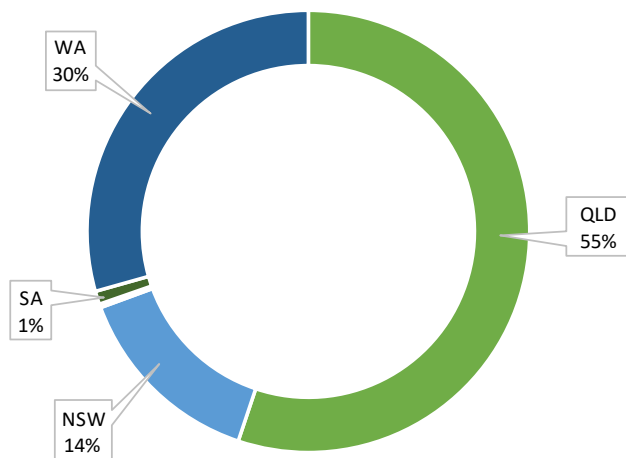
Australian avocado production

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)
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
2017/18	77,032	14,005,754	\$ 557	\$ 543	\$ 958	\$ 11.6
2018/19	85,546	15,553,808	\$483	\$444	\$898	\$19.6

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 2018/2019



Queensland continues to produce the majority of Australian avocados, with 55% of production. Western Australia produced the next largest share at 30%.

Avocado production by state (tonnes)

Year	Qld	NSW	Vic/Tas	SA	WA/NT	Total
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
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

Avocado regions in Australia

Annual tonnes produced in each region averaged over two years*: 2017/18 and 2018/19



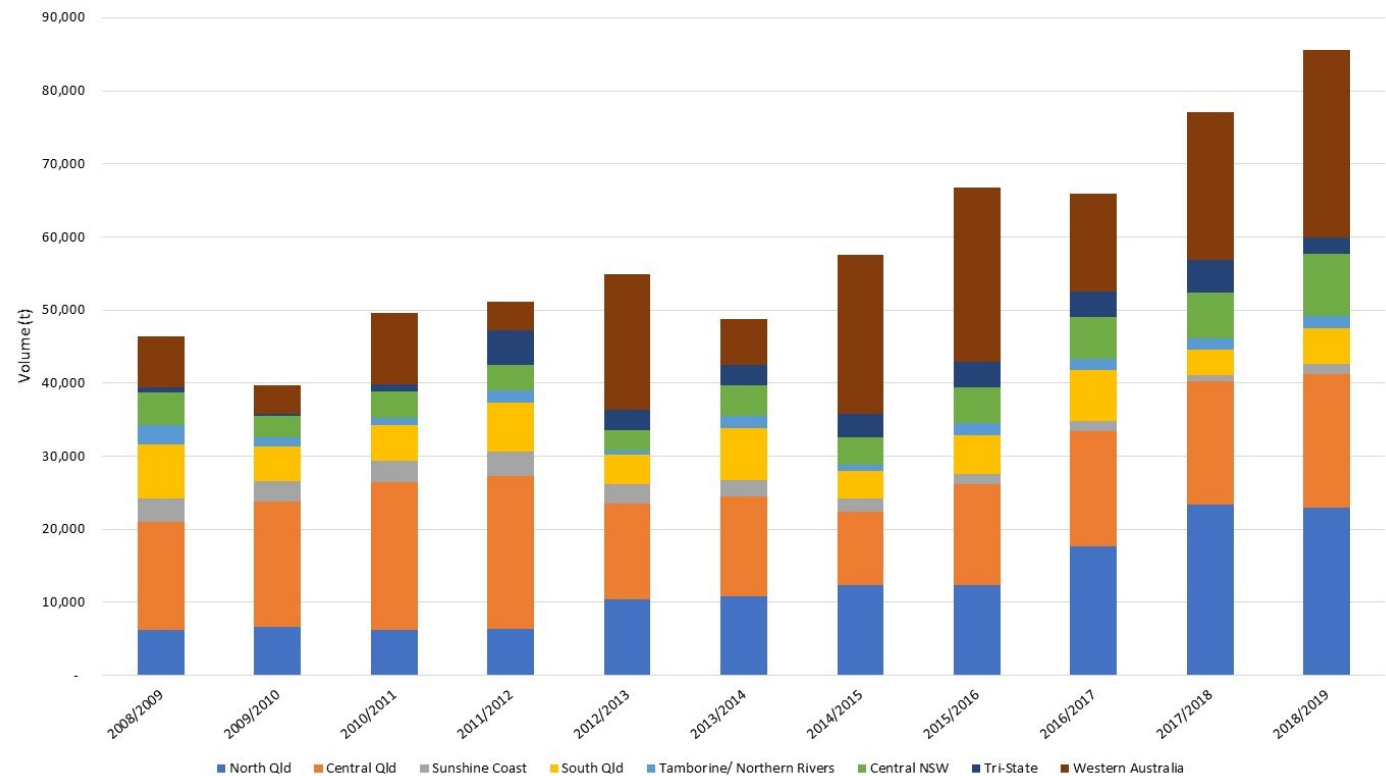
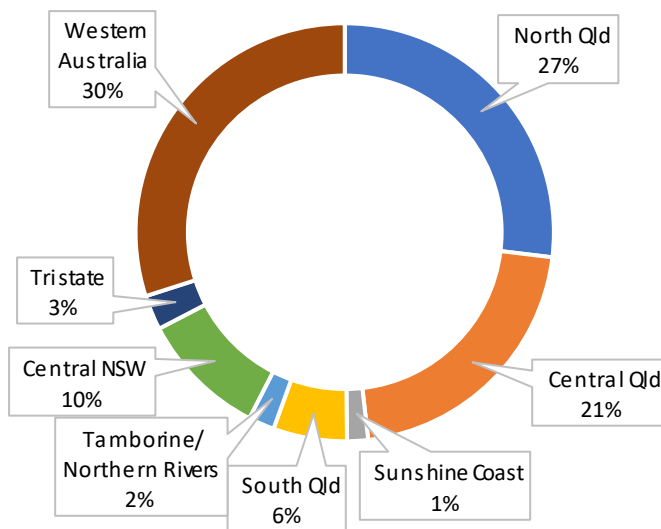
* A two-year average is used to compare production by region, because some regions have irregular bearing years, meaning crop load may vary significantly from year to year.

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 2017/18 and 2018/19, production has mostly come from the Queensland regions (57%) and Western Australia (28%).

Avocado production by region

Avocado production by region 2018/2019



Avocado production by region

Supply across the regions was variable with some regions supplying higher volumes and some supplying lower volumes in 2019 compared with 2018.

Western Australia exceeded its previous financial year's output by over 5,400 tonnes (+27%). Proportionally however, the largest output jumps have taken place in South Queensland (+41%), and Central NSW (+34%).

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
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
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
2018/19 % by region	27 %	21 %	2 %	6 %	2 %	10 %	3 %	30 %	
Past 2yr average % by region	29 %	22 %	1 %	5 %	2 %	9 %	4 %	28 %	

Avocado supply periods by region



Hass Avocado



Shepard Avocado

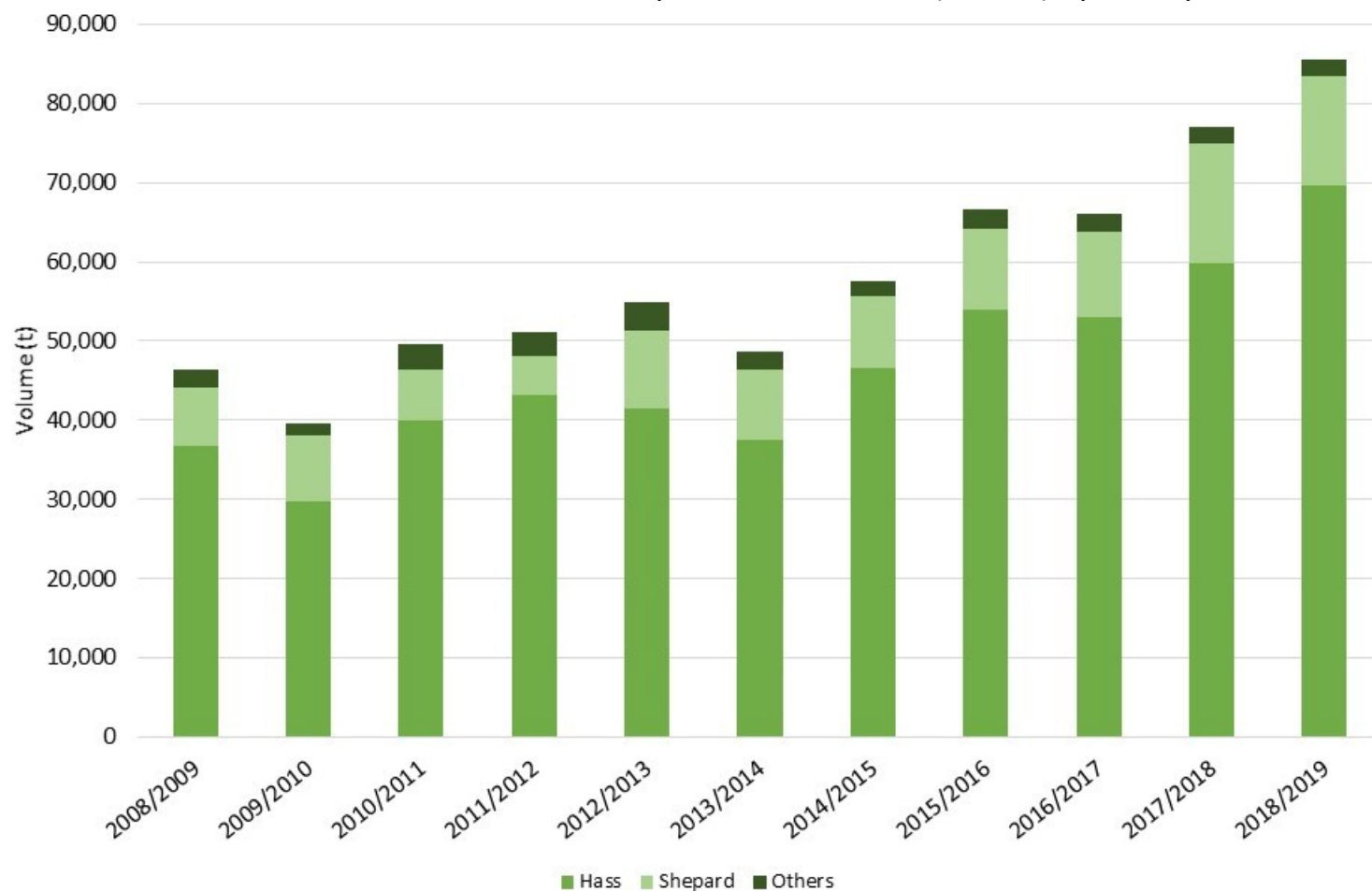
Australian avocado supply periods by region and variety													
Region	Variety	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
North Queensland	Hass												
	Shepard												
Central Queensland	Hass												
	Shepard												
Sunshine Coast	Hass												
South Queensland	Hass			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

Avocado production by variety

Australian annual avocado production volume (tonnes) by variety

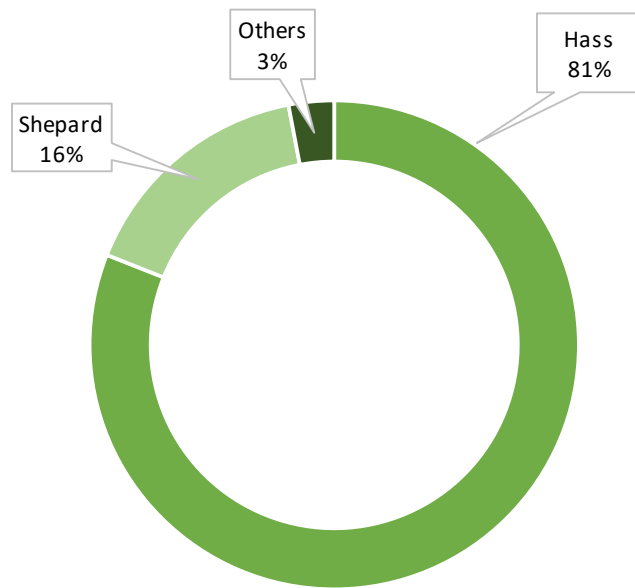
In Australia, avocados are produced almost all year round due to the range of climates and conditions in our eight major avocado growing regions.

Hass is the main avocado variety, and is produced almost all year round. In 2018/19 Hass represented 81% of production. Shepard, which is harvested in Queensland through late Summer and Autumn, made up 16% of production, and at that time of year, is the dominant Australian variety on the market.



Avocado production by variety

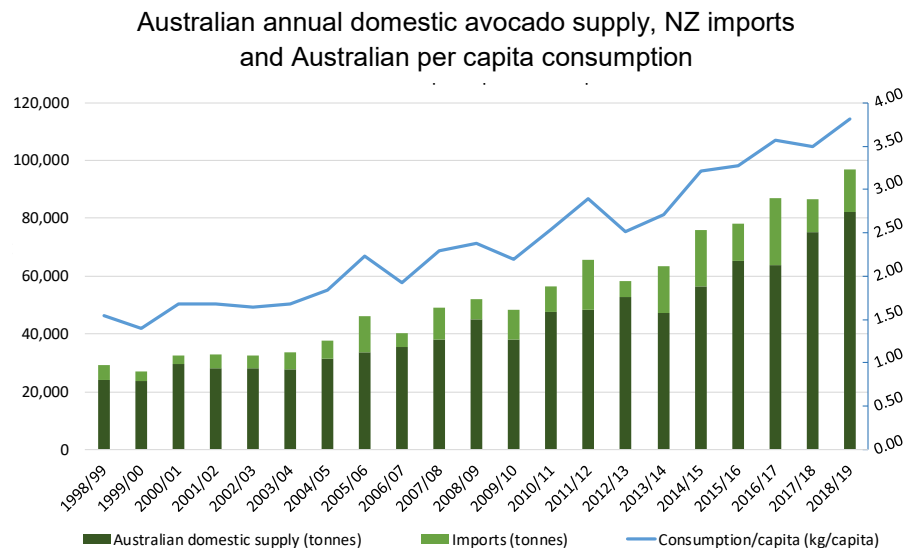
Australia's avocado production by variety in 2018/19



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

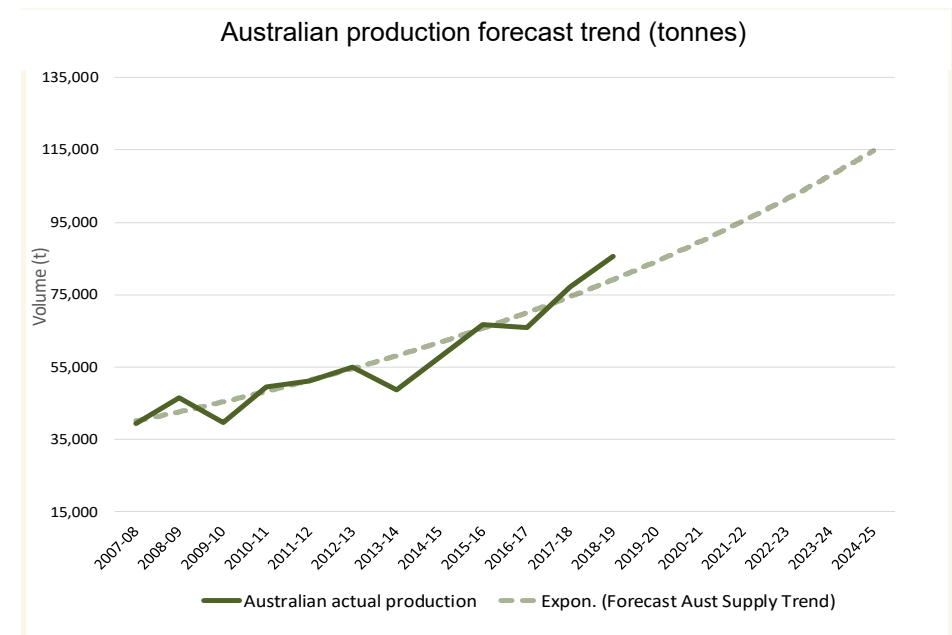
Production by Variety (tonnes)				
Year	Hass	Shepard	Other	Total
2008/09	36,669	7,450	2,327	46,446
2009/10	29,790	8,353	1,498	39,641
2010/11	39,913	6,418	3,280	49,612
2011/12	43,155	4,923	3,035	51,113
2012/13	41,398	9,923	3,556	54,877
2013/14	37,513	8,882	2,320	48,715
2014/15	46,540	9,090	1,966	57,595
2015/16	53,965	10,281	2,470	66,716
2016/17	52,962	10,860	2,169	65,992
2017/18	59,870	15,085	2,077	77,032
2018/19	69,615	13,775	2,157	85,546

Australian consumption of avocado



Sources: Infocado, IHS Global Trade Atlas (2019) and population based on ABS data

Australia avocado consumption in 2018/19 was 3.81kg per person. Imported New Zealand fruit supplements Australian supply during their harvest season during Spring and Summer.

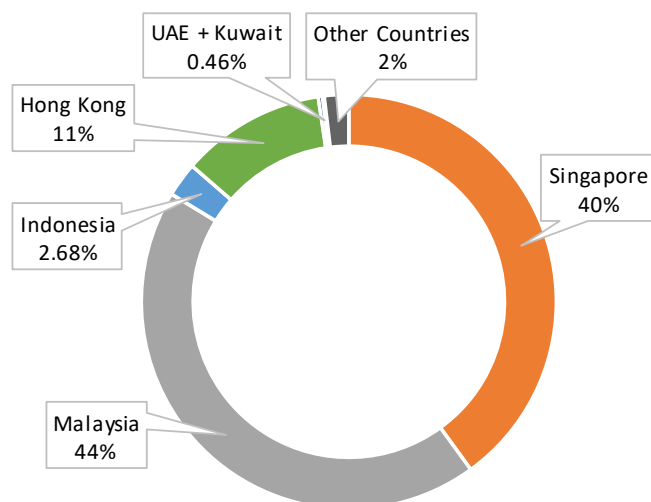


Sources: Infocado, Avocados Australia analysis

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.

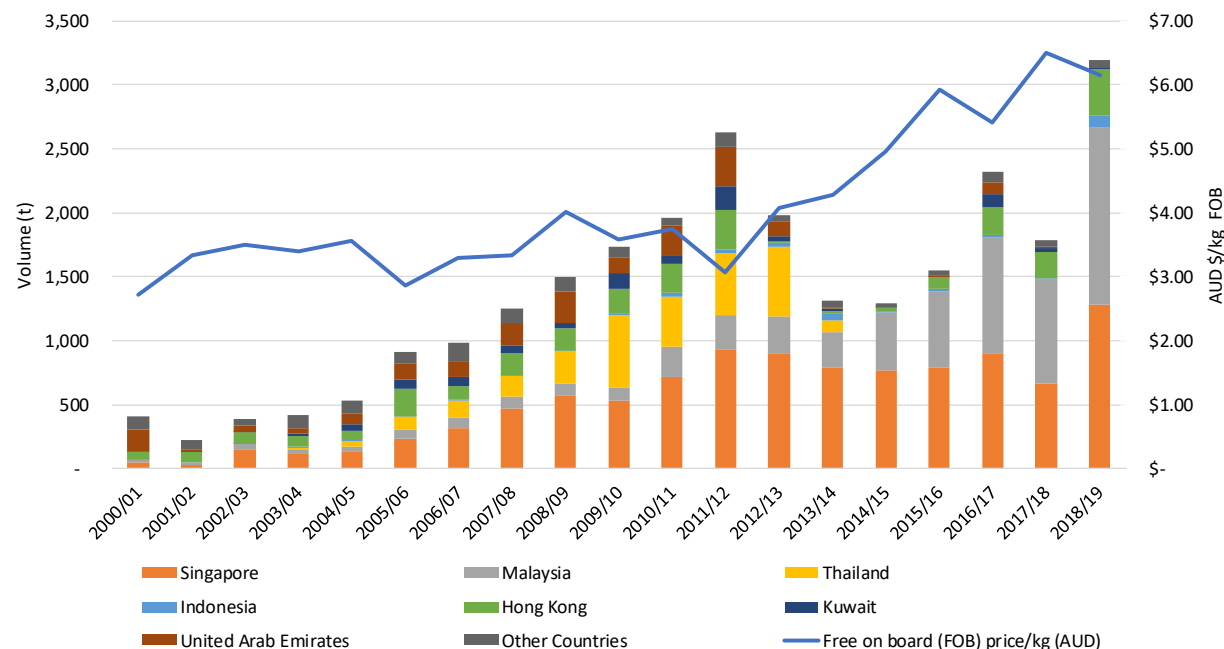
Australian avocado export markets

Australia's export markets in 2018/19



Source: IHS Global Trade Atlas (2019)

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 2018/19 Australia exported 3,195 tonnes of avocados, which is 3.73% of the 85,546 tonnes produced in Australia.