

THE AUSTRALIAN FOODSERVICE MARKET FOR AVOCADOS

MARKET SIZE



Private report prepared for Hort Innovation
July 2019



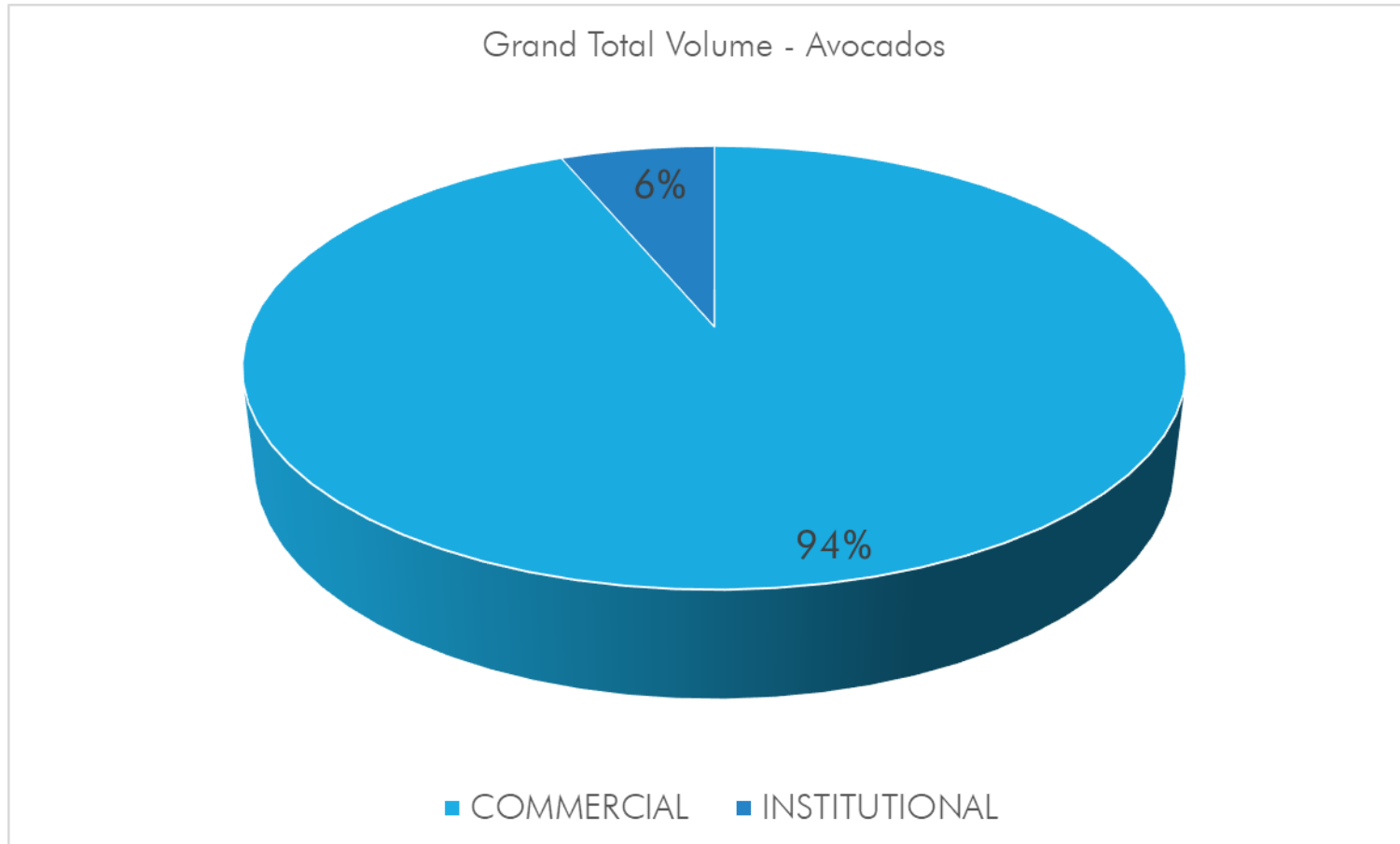
1 GRAND TOTAL OVERVIEW



MARKET SIZE DATABASE INDEX PAGE

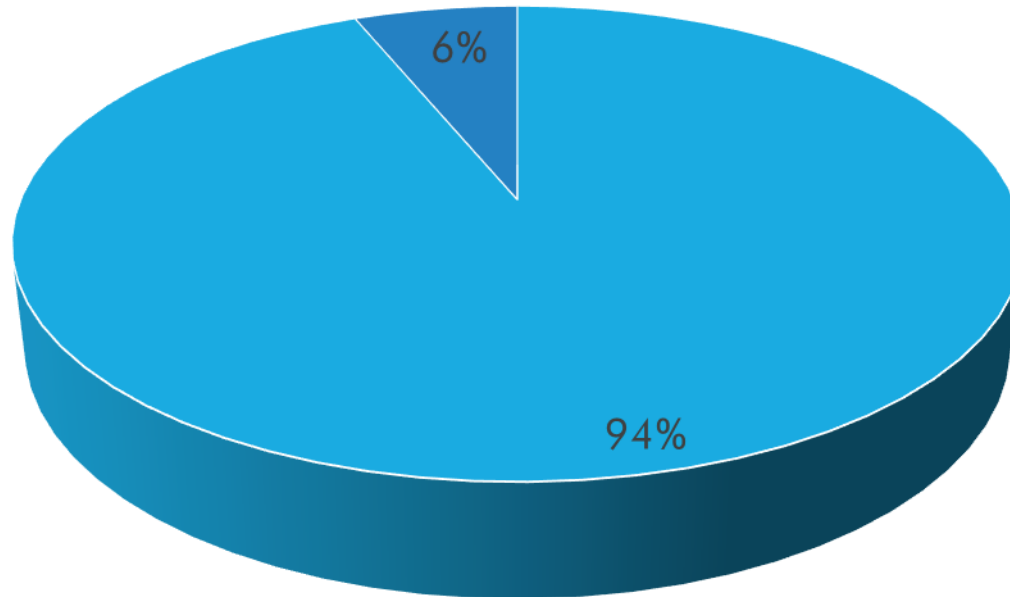


1	Title	TOTAL MARKET SIZE BY VOLUME	TOTAL MARKET SIZE BY VOLUME
	Units	Kilos	
	Detail	Broken down by product category & product	
2	Title	COMMERCIAL MARKET SIZE BY VOLUME	COMMERCIAL MARKET SIZE BY VOLUME
	Units	Kilos	
	Detail	Broken down by product and commercial channel	
3	Title	INSTITUTIONAL MARKET SIZE BY VOLUME	INSTITUTIONAL MARKET SIZE BY VOLUME
	Units	Kilos	
	Detail	Broken down by product and institutional channel	
4	Title	TOTAL MARKET VALUE	TOTAL MARKET VALUE
	Units	Wholesale Price in AUD	
	Detail	Broken down by product category and product	
5	Title	COMMERCIAL MARKET VALUE	COMMERCIAL MARKET VALUE
	Units	Wholesale Price in AUD	
	Detail	Broken down by product and commercial channel	
6	Title	INSTITUTIONAL MARKET VALUE	INSTITUTIONAL MARKET VALUE
	Units	Wholesale Price in AUD	
	Detail	Broken down by product and institutional channel	
7	Title	PRODUCT CONSUMPTION INDEX (PCI)	PRODUCT CONSUMPTION INDEX (PCI)
	Units	Average volume of product used per outlet in kilos weekly	
	Detail	Broken down by channel	



- ❖ The total volume of both Processed & Whole Avocados is heavily dominated by the Commercial sector.

Grand Total Value - Avocados



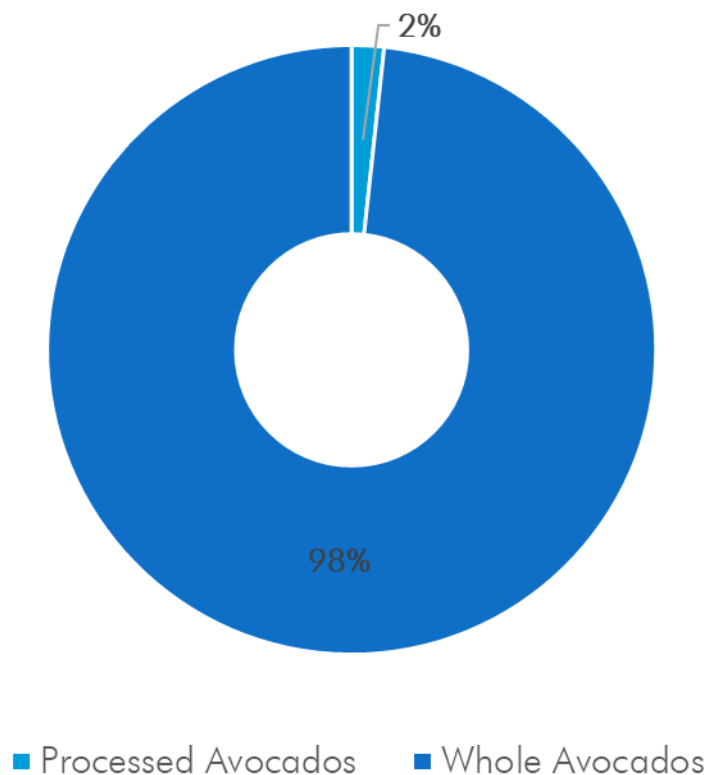
■ COMMERCIAL ■ INSTITUTIONAL

- ❖ The total foodservice market size for Avocados is more than A\$47 million. The Commercial sector accounts for 94% of total value; equating to A\$44.2 million.

TOTAL VOLUME BY PRODUCT

11.2 mill kgs

Grand Total Volume by Product

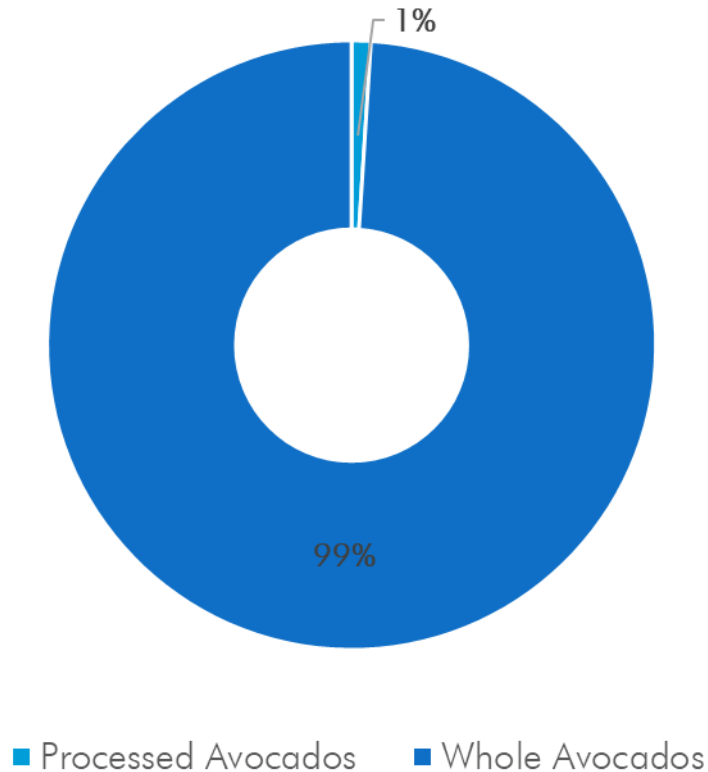


- ❖ The use of Processed Avocados in the Australian Foodservice market is minimal accounting for only 2% of total volume purchased of 11.2 million kilos.

TOTAL VALUE BY PRODUCT

47.1 mill AUD

Grand Total Value by Product

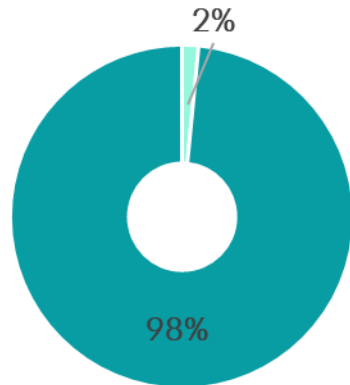


- ❖ When it comes to the value of Processed Avocados across both the Commercial & Institutional sectors, it equates to less than half a million dollars.



10.5 mill kgs

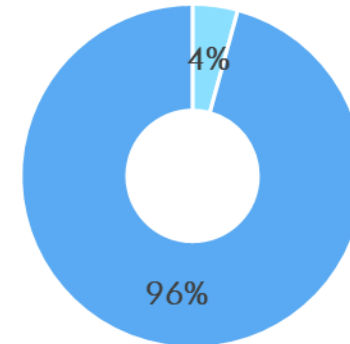
Total Volume by Product - Commercial



Processed Avocados Whole Avocados

0.7 mill kgs

Total Volume by Product - Institutional



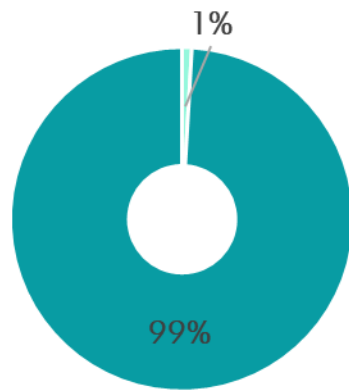
Processed Avocados Whole Avocados

TOTAL VALUE BY PRODUCT BY SECTOR



44.2 mill AUD

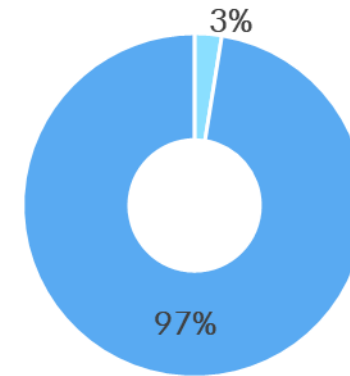
Total Value by Product - Commercial



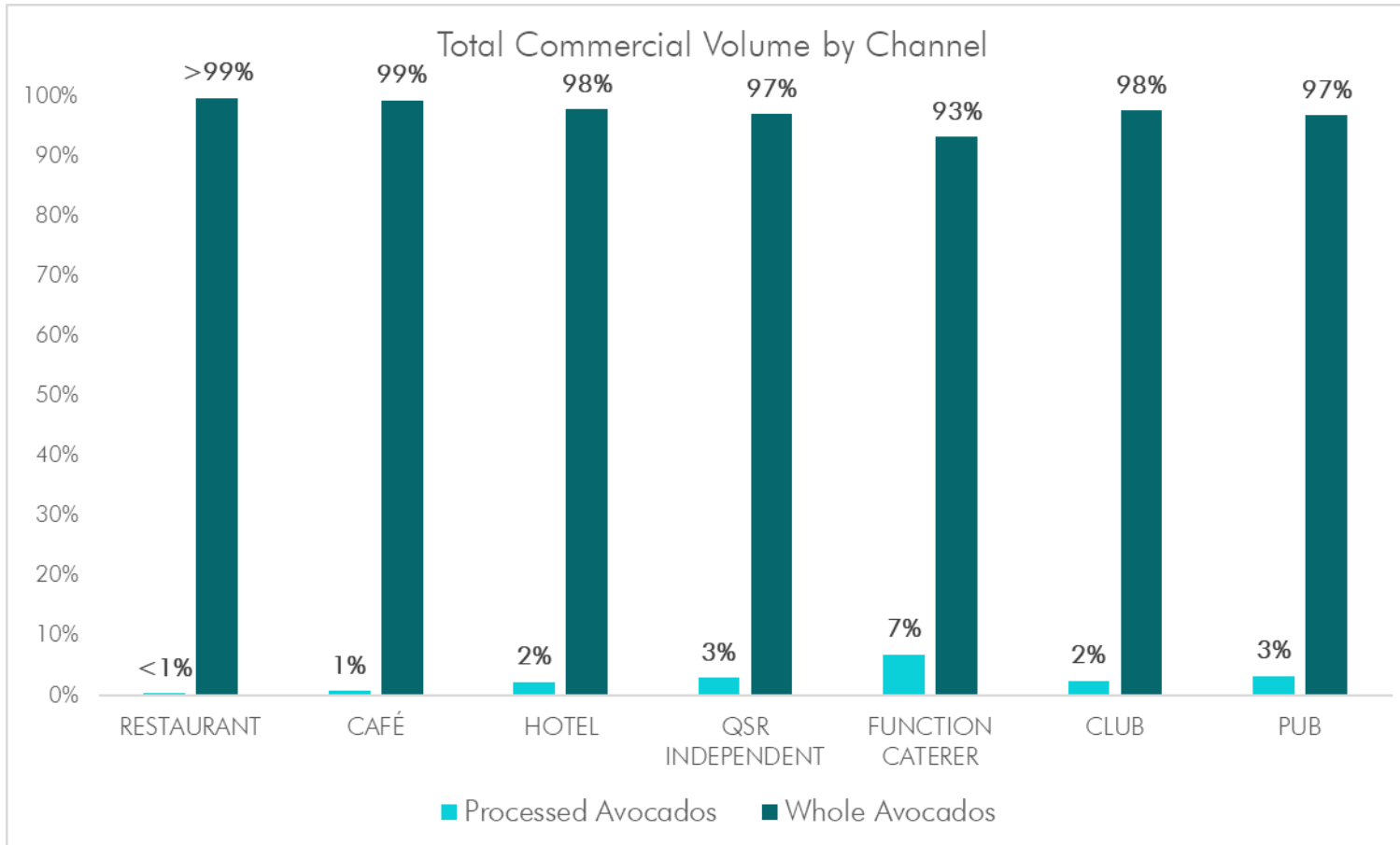
■ Processed Avocados ■ Whole Avocados

2.9 mill AUD

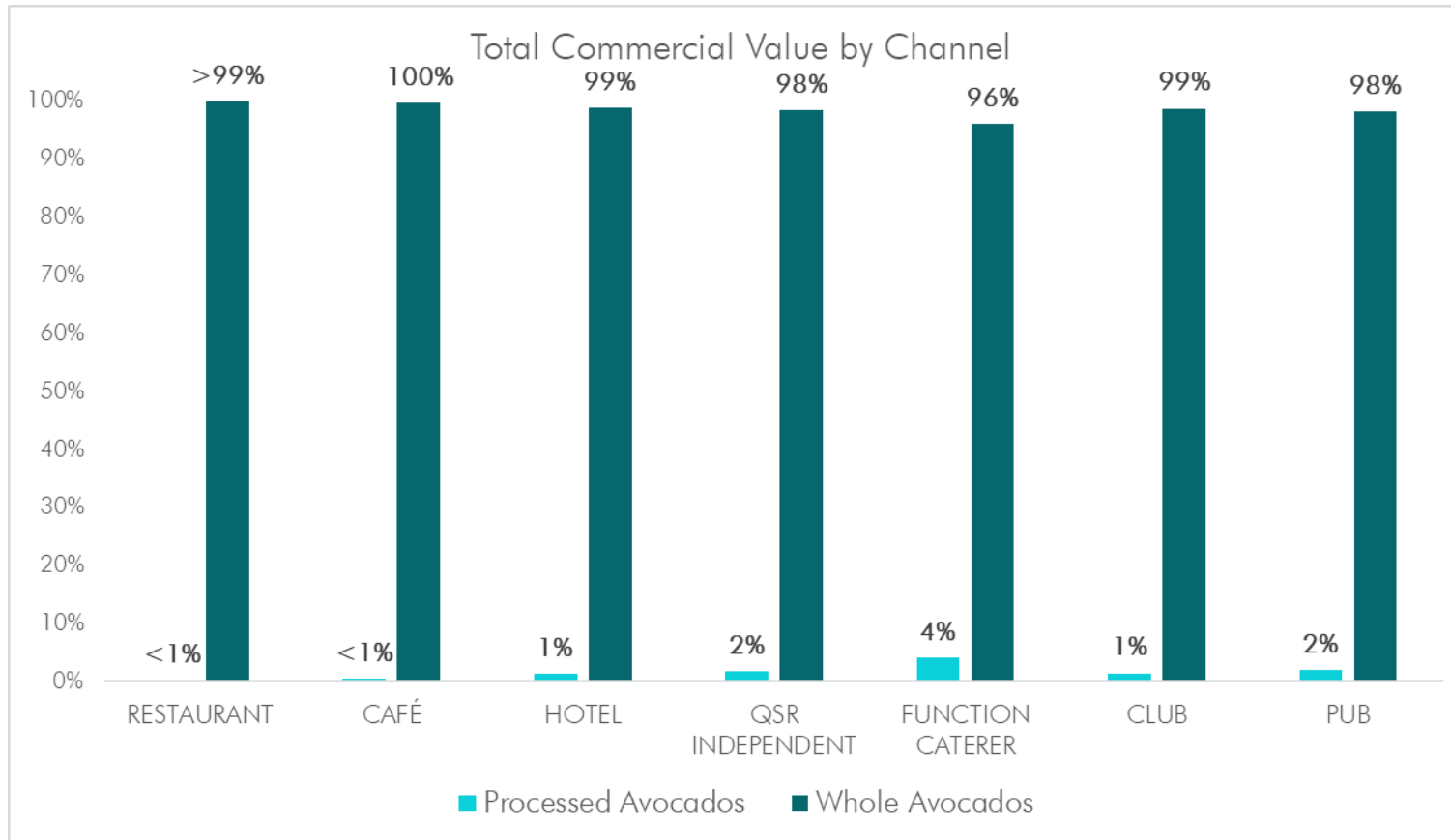
Total Value by Product - Institutional



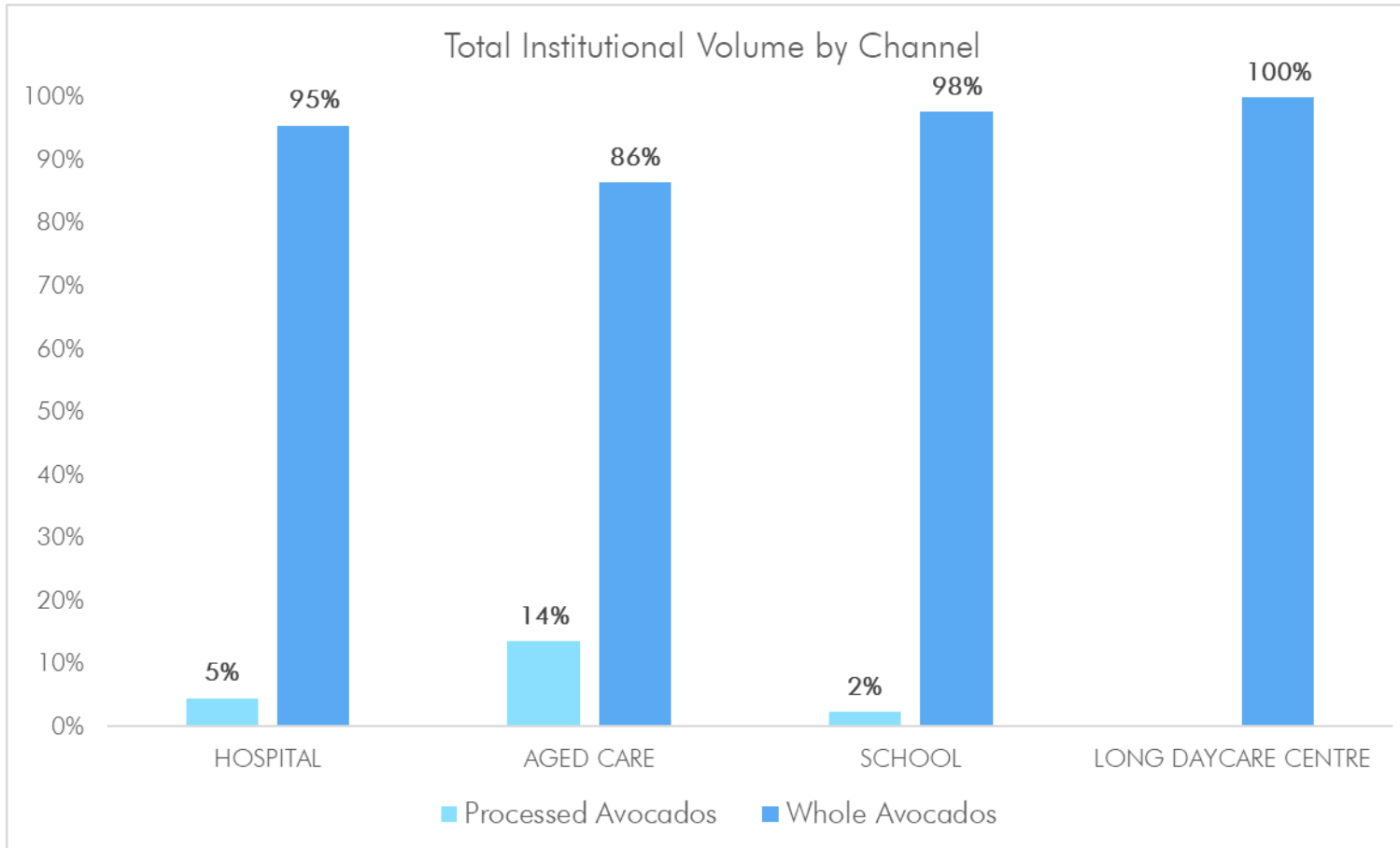
■ Processed Avocados ■ Whole Avocados



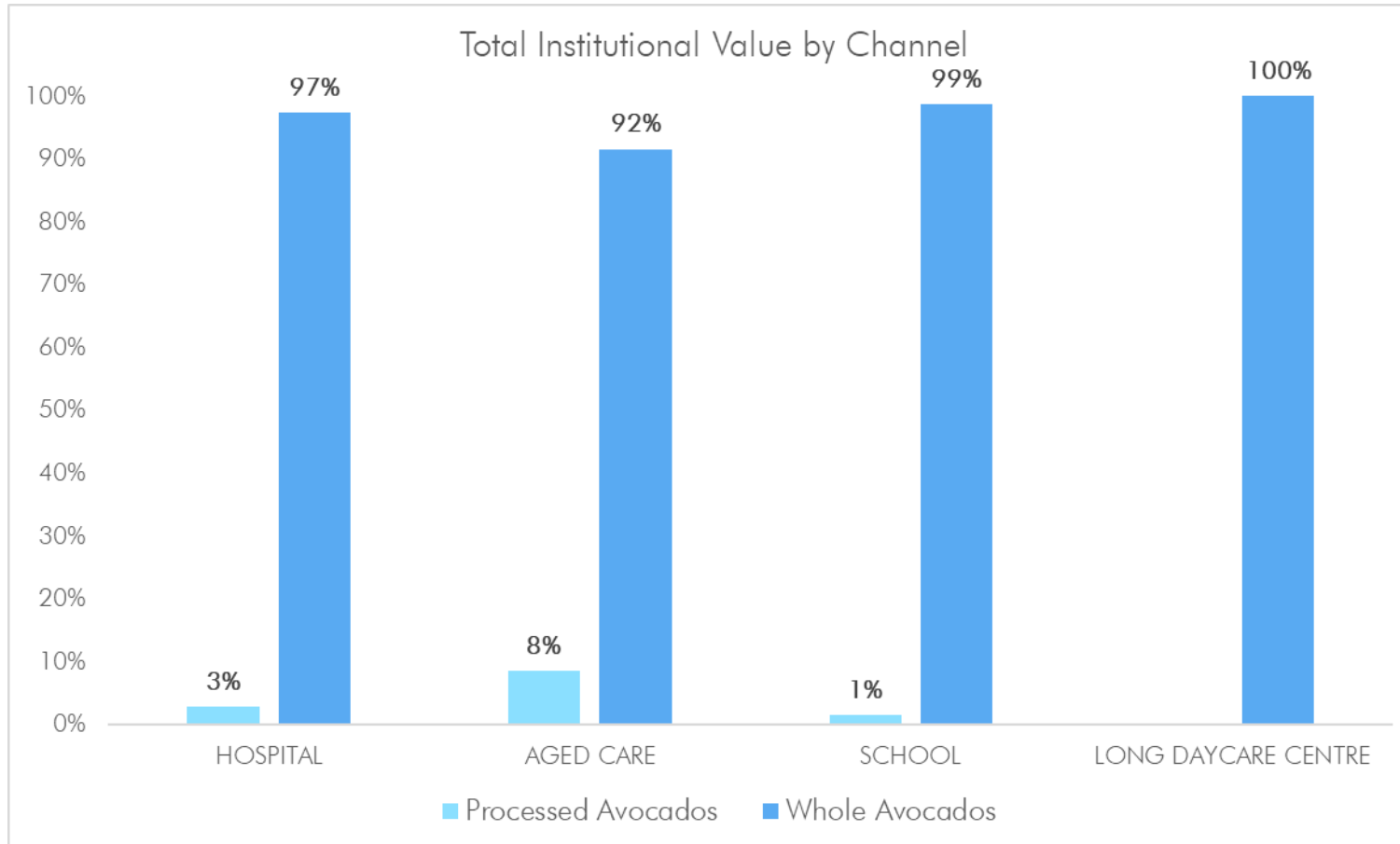
❖ Very little Processed Avocado is used across the Commercial outlets with highest volume (7%) purchased by Function Caterers.



❖ No Commercial channel has a value share greater than 4% when it comes to the procurement of Processed Avocados.



❖ The only significant use of Processed Avocados is within Aged Care facilities with 14% of all their Avocados used being processed.



❖ The only Institutional channel with a slightly higher market value share of Processed Avocados is Aged Care facilities at 8%.



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