Final Report

Avocado industry market data capture and analysis

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Delivery partner:

Avocados Australia

Project code:

AV20000

Project:

Avocado industry market data capture and analysis (AV20000)

Disclaimer:

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Contents

Summary

Avocados Australia has successfully facilitated and delivered *Avocado industry and market data capture and analysis*, a program conceived to support both short- and long-term business-level and industry-level planning and decision making across the Australian avocado industry. This has entailed provision of robust industry data to underpin effective supply chain management.

Much of the data that has been collected, collated, analysed, and reported through this project has been dependent on the contribution of data from individual businesses. One of the criteria for assessing the success of the project is the level of data contribution, which has continued to increase over time. Over the three years of the project, the average participation rate increased from 88.42% in FY2020-21 to 92.81% in FY2022-23, weighted by volumes produced by region.

Another success criteria was the alignment of avocado supply volumes that were reported through this program, compared to the levy receipt volumes reported by the Department of Agriculture, Fisheries and Forestry, Levies Revenue Service each quarter. For the three-year period, Infocado covered 92.25% of levied volume, on average, weighted by yearly volume produced. For more detail on these figures please refer to the 'Results and Discussion' section.

The suite of reports and insights that have been developed throughout this project have been provided to industry on a regular basis to assist with business and industry planning and management. For individual businesses and the broader industry, the data has provided:

- Weekly reports which show volumes of avocados supplied into the domestic market in the past week and the forecast volumes to be supplied in the next four weeks. This data has assisted suppliers and traders to monitor and moderate the flow of avocados through the supply chain to minimize the risk of over or under supply, therefore optimizing quality at a retail level and value to the supply chain.
- A rolling 12-month monthly forecast of avocado supply into the Australian market to assist with seasonal transitions, planning harvest, logistics, and marketing.
- Insights into export market opportunities and an understanding of global competitors.
- Information on current plantings and therefore likely future production levels by region/time of year.
- Long-term production forecasts to guide industry strategic plans, R&D, and marketing investments.
- Data to monitor industry performance and progress over time.

Keywords

Avocado, growers, packhouses, traders, data, reporting, dispatch, forecast, Infocado, OrchardInfo, export

Introduction

High quality industry data is essential for business and industry planning. Avocados Australia has long provided a service to industry to collect, analyse, and report industry data to assist with such planning.

Avocado is a unique crop that only begins to ripen once harvested. It is precisely this trait that enables the industry to utilise data to moderate the flow of fruit volumes through the supply chain. This creates great opportunities for the industry and consumers to benefit from consistent product quality due to more stable supply, and consistent prices which supports demand and optimises returns for growers.

The Australian avocado industry is continuing to experience rapid expansion which presents both opportunities and challenges. While domestic and global demand for avocados also continues to grow, Australian producers will continue to respond to this opportunity. However, the industry understands the important role that good data can play and has played in the industry's development thus far. The industry recognizes the value of both short-term and long-term forecast information in terms of supply to the Australian domestic market. However increasingly, data plays an important role as the industry plays a growing role in the global avocado market.

The industry has long recognized the importance of having access to timely and robust supply chain data. This project was built on the highly successful programs developed and implemented by Avocados Australia over the past 18 years and ensured the provision of industry data continued to remain relevant and front of mind for stakeholders.

With this project, Avocados Australia has sought to increase participation levels and data accuracy from suppliers and vendors, by devising and introducing improved means and instruments that capture industry data more effectively and reporting that better portrays the dynamics of the Australian avocado supply chain. This project has also given closer consideration to global trade dynamics and to support the burgeoning Australian avocado sector.

Methodology

1. Seasonal avocado throughput collection and forecast system

a. Infocado – Weekly Infocado Reports for short-term data.

Data on the volume of avocados dispatched in the previous week (Saturday to Friday) by size, variety (Hass, Shepard or Other), and pack type, as well as a forecast for the following 4 weeks were provided weekly by packhouses.

Due to the significance of the NZ industry in the Australian market, New Zealand imports to Australia were routinely captured, reported, and validated with ABS data.

Reports were compiled each week reporting the four-week forecast and prior week dispatch data, showing volume of fruit dispatched by region (including NZ), variety (Hass, Shepard, Other), fruit size, pack type, with exports, and processing quantities. The Weekly Infocado Report was emailed to all contributors and Hort Innovation each Tuesday and loaded to the Avocados Australia website on a six-week delay. This provides an incentive for contributors to participate.

A dynamic version of these weekly reports was made available online to contributors through our AvoData platform. In these dynamic reports, the user has the ability to filter and select different metrics and time spans. Contributing users have access to the latest short-term 'weekly' data, by logging in to AvoData.

b. Infocado – Quarterly Infocado Reports for medium term data.

Every three months all avocado packhouses (including NZ industry) provided seasonal forecast data for the coming 12 months through AvoData. This frequency of updating is necessary due to the wide range of growing regions and cropping cycles. Individual contributors log in to access and update their data during a specified window each month.

Participating packhouses contribute data online through the AvoData platform. To capture forecast data for those packhouses that do not contribute online, a call-around to key packers in each of the regions was undertaken at the appropriate timing, seeking estimates to complete the information for the quarter.

Regular follow up reminders and remote support for data entry was provided as required. Our experience over the years shows that personal engagement with participants is essential to maintain high participation levels.

Using available data and estimates, quarterly reports showing dispatch data for the past 12 month and forecast data for the following 12 months was produced. This report shows monthly volumes by variety (Hass, Shepard, Other) and region. An average monthly retail price (from the weekly on-line price monitoring) is overlayed on the historical dispatch data to show the relationship between volumes and retail price.

Packhouses are encouraged to use the crop forecasting case studies available on the Best Practice Resource to develop their seasonal crop forecasts.

The reports have been provided to the Marketing Manager at Horticulture Innovation Australia Limited, and the Industry Strategic Partner and have been used in AAL discussions with retail chains to assist with seasonal category management planning and promotion.

c. Stakeholder engagement drive.

Between August 2021 and March 2023, a total of 108 visits to 72 distinct packers in 5 growing regions took place. During these visits, many earlier non-participating packers were onboarded to the program, where training sessions on the usage of our new data system were provided, as well as how to read and interpret our reports, and collecting general feedback.

d. Infocado system review and improvement.

Earlier in this project, Avocados Australia's data system's development was completed and released for industry wide adoption. Monitoring of technology developments to determine options for improved data capture and reporting is ongoing. We recently completed a survey to identify possible improvements we could potentially incorporate to our system and reports, and ultimately provide our industry with the best data possible. We are currently incorporating features that will ease data entry process for some users, and considering other additions that will enhance efficacy of the data reported.

e. Data system rebuild – new challenges and features.

We have onboarded a number of new contributors throughout the project and provided support to all new and existing contributors to get them up to speed with the new system. The process was successfully and smoothly completed. All contributors currently submit their weekly and seasonal data with minimal support.

2. Avocado industry strategic information system

a. Maintain OrchardInfo – Annual Tree Census for medium to long-term data.

The Annual OrchardInfo Report has been collated and distributed to all contributors at the end of each year. The reports indicate Australia's production capacity, number of trees and area planted, year planted, variety and tree density. We validate tree census numbers with data from the Australian Bureau of Statistics, however the Australian tree crop map (ATCM), developed by the Applied Agricultural Remote Sensing Centre at the University of New England, is a more recent resource which now provides a fairly good representation of the geographical location and size of avocado orchards (and other crops) in Australia. We now use the ATCM as a secondary resource to validate our tree census numbers. The OrchardInfo report has been distributed to all contributing growers each year directly via email.

b. Monitor productivity change over time in different regions for medium- and long-term data.

Participation in our annual productivity survey was very poor, despite incentives and follow up engagement. The decision was made to abandon this component of the project as the data sets were inadequate for publication.

A new benchmarking project (AV22004: Avocado Industry Benchmarking) has been commissioned that will have the resource capacity to collect reliable productivity data.

c. Maintain and increase grower/stakeholder participation rates.

Growers have been well engaged with the OrchardInfo tree census, and response levels have been increasing. In the last couple of years, we have extended the period of data collection from 6 to 15 weeks to maximise the completeness of the dataset. Significant efforts have been made to ensure that most if not all growers' details have been recorded. Furthermore, the data capture has been streamlined to improve ease of use and has facilitated a higher participation rate from industry.

3. Industry data analysis

Analysis of Data on Retail Sales of Avocados

A study was carried out to estimate retail price elasticity of demand for avocados, by analysing data from consumer purchases. This work was completed by agricultural economist Mr Garry Goucher (Gary Goucher and Associates).

The data comprised 132,618 individual retail purchase transactions over a two-year period from December 2017 to November 2019. The transaction data was collected by the Nielsen Company from their 'Homescan' sample of consumer households across Australia. The sample comprised 8,606 households selected to be representative of Australian household consumption.

A range of analytical methods were compared in order to identify the combination of demand function, data format and regression type that would deliver the best estimate of the price elasticity of demand given the various constraints facing this type of analysis.

The analysis found estimates of the retail price elasticity demand mostly within the range from around -0.5 to -0.7. That is, a 10% rise in the retail price of avocados could be expected to result in between 5% and 7% decline the number of avocados purchased by consumers.

Although the study benefitted from analysing a large number of transactions, some reservations remain about the statistical reliability of the estimates of elasticity. The explanatory variables that were available for the analysis do not explain all of the factors that drive variation in individual consumer purchase decisions. For many consumers, avocados may be regarded as an optional purchase and subject to a degree of whim or impulse.

Other ad-hoc analyses and tailored reports

Other analyses reports have been prepared on request for governments. The content of these reports was prepared to inform departmental updates, such as Queensland's Department of Agriculture and Fisheries 'AgTrends' and The Horticulture Coalition of SA PIRSA Primary Industries / Food and Wine Scorecards which are published once a year. The reports included data captured through this project relevant to the particular States such as production volumes, Gross Value Product, average farmgate price, among other variables as was required.

4. Global trade data analysis

Specifically targeting current and potential exporters, a global trade data analysis framework was developed in Q2 of 2018. This framework provided the foundation for a series of reports that have been developed and provided to exporters and the broader industry to assist with developing export markets and understanding global competitors. Reports were compiled by Mr Wayne Prowse (Fresh Intelligence Consulting).

The current suite of global trade reports is comprised of:

- Weekly export update: 1-page weekly dashboard report based on DAFF data showing latest week and year to date exports comparison to the previous year, with commentary.
- Monthly export update: Latest month and year to date Australian exports comparison to the previous year and Moving Annual Total (MAT) by volume, value, and unit value. Latest months import update and market shares and CIF price points by competitor for 5 key markets of interest (Singapore, Hong Kong, Malaysia, Japan, and India). Latest Australian imports from New Zealand and Chile by month and season to date.
- Exports and imports – (June and December): twice yearly reports involving data tables, analytics, graphs covering exports by market and states, 10-year trends, volume, value and unit value, key export market competitive trade and basic commentary in PowerPoint format suitable for presentations, and in PDF for publishing on the industry website. Sourced from GTIS and ITC TradeMap.
- Global export markets and trade (yearly): A yearly report on market profiles for each of the global top 5 importing countries and 10 markets of interest in Asia and Middle East, showing 5-year import / export trade by volume, price, and consumption (to latest CY) with analytics and commentary – by 30 September each year.
- Producers / competitors (yearly): 2-page market profile report assessing global trade flows focussed on each of the leading 10 producing countries production and export trade by volume, price, over 5 years (to latest CY), including key Latin American suppliers Mexico, Peru and Chile with analytics and commentary – by 30 September each year.

5. Annual report of industry statistics

The statistics snapshot 'Facts at a Glance' report has been published annually around September on the Avocados Australia website at http://www.avocado.org.au/news-publications/statistics/. This is a comprehensive document for both public and industry, providing the latest statistics relating to the Australian avocado industry. The report draws

heavily on the Infocado-derived data, along with other data sources to provide a status report of the industry volume and value, as well as providing projections of future growth.

6. Communication (via AV21004) and regional forums (delivered by AV17005)

Regular updates on the project outputs as well as insights from the data analysis have been provided to industry through the industry communication project, particularly through the Talking Avocados magazine, but also through the website, Best Practice Resource and Guacamole e-newsletter. For more detail on the outputs of the project communicated through AV21004 please refer to appendix C 'Outputs Table'.

7. General Requirements

All data collection system databases are hosted and maintained appropriately on our online platform. Data has been collected in line with the platform's terms of use as stated on https://avodata.avocado.org.au/app/ConditionsOfUses, and reports have been emailed and disseminated through electronic means enabling participants to tailor data extraction and generate their own individual reports on-line to suit their specific needs.

8. Data verification

As part of this project, a data verification schedule was developed to cross check and verify collected data obtained through each system with suitable alternative information sources. The schedule was used throughout the project to ensure that the data collected was within the thresholds established, and in alignment with other relevant sources.

Dispatch data was verified against quarterly levy receipts provided by the Department of Agriculture, Water and Energy. The target was for Infocado dispatch data to represent at least 85% of the volumes attributed to levy receipts each quarter. During the life of the project this benchmark was consistently achieved. Seasonal forecast data by region was verified against the end of season regional dispatch totals. The target was for variations to be less than 20%. During the life of the project this benchmark was achieved with some exceptions that have been justified, usually unfavourable weather conditions during a season.

Orchard planting data was verified primarily against data from the Australian Bureau of Statistics. During the life of the project the benchmark was consistently achieved. We are also now using the Australian tree crop map (ATCM) as a secondary resource to validate our tree census numbers. It is to be noted that refining the map information is an ongoing effort and there is a portion of the grower population who does not want to disclose information about their orchards. Because of this there is a persistent gap between our records and the ATCM. It is also to be noted that we are in the process of linking both databases in the next couple of years.

For reference, the data verification schedule and schemas showing evidence that these benchmarks have been met, can be referred to in appendix A 'Data Verification'.

Results and discussion

1. End of project survey results.

As the project approached its end, we invited active program participants to have a say about the projects reports, specifically about Infocado and the AvoData system in general. The information gathered was aimed at gauging the reports' effectiveness and gaining insights into possible improvements we could potentially incorporate to our system and reports, and ultimately provide our industry with the best data possible.

The survey consisted of 4 statements with the option to rate each on a scale of 5 from 'strongly agree' to 'strongly disagree', plus one open question for participants to describe changes or improvements to the system and/or reports, they may deem necessary.

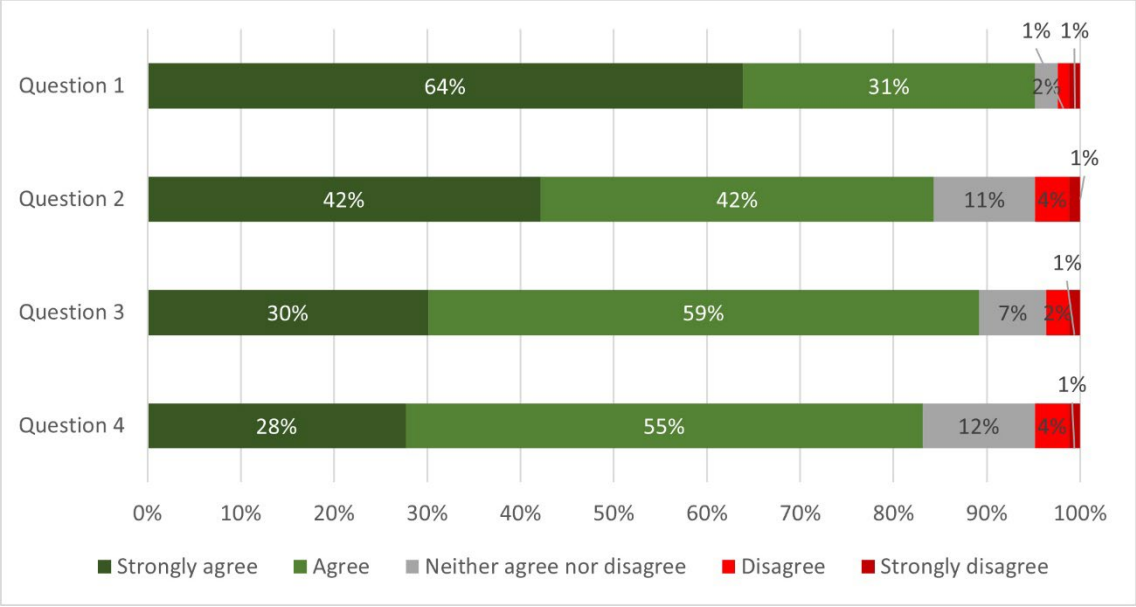
83 active participants responded the survey. All respondents are key decision makers that represent businesses responsible for over 70% of the volume produced by the avocado industry, ranging from the very small to the very large. The survey statements were:

Question 1: "A supply/demand balance is necessary to optimise returns for growers and deliver high quality avocados for consumers".

Question 2: "Infocado is a useful tool to help balance the supply and demand of avocados."

Question 3: "The information presented in Infocado provides a good representation of the supply status of the avocado industry."

Question 4: "The information presented in Infocado helps me make informed decisions in my business."



The survey aimed to explore how much value Infocado provides the participants that use the system and also to guide further potential improvements. The survey responses are summarised in the graph provided above.

These results clearly show the value of the data to participating businesses: 95% of them agree or strongly agree with the importance of a supply/demand balance to optimise returns for growers and deliver high quality avocados for consumers; 84% of responding businesses agree or strongly agree Infocado is a useful tool to help balance supply and demand; 89% agree or strongly agree that Infocado provides a good representation of the supply status, and 83% agree or strongly agree that the information helps with making informed business decisions.

The last question 'how would you change or improve the Infocado system or reports?' was an open question and, we

have received some good feedback as well as some interesting ideas which can be further explored. See appendix D 'Survey Feedback'. We look forward to running these ideas by industry to potentially incorporating some of them.

Accurate and verified supply volume data is essential to support a supply/demand balance, as it helps packers, distributors, retailers, and other industry stakeholders make informed decisions to respond to market dynamics which impact on prices and quality. The supply data presented weekly on Infocado represents around 92% of the volume of avocados produced in Australia and all imports from New Zealand and Chile (delayed). The data helps the industry manage its supply and thereby creating efficiencies throughout the supply chain. Active and engaged participation in Infocado by the majority of industry, is the main way we can ensure that the information gathered is reliable and useful.

2. Trends revealed by the data.

Our production forecast model is a projection that gives an indication of domestically produced avocado volumes we can anticipate in the coming years. The model is built considering 2 main factors: orchard census data and regional yield estimates.

Orchard census data provides detail of the number of trees and hectares currently planted, their age, where they are, and at what rate they are planted each year.

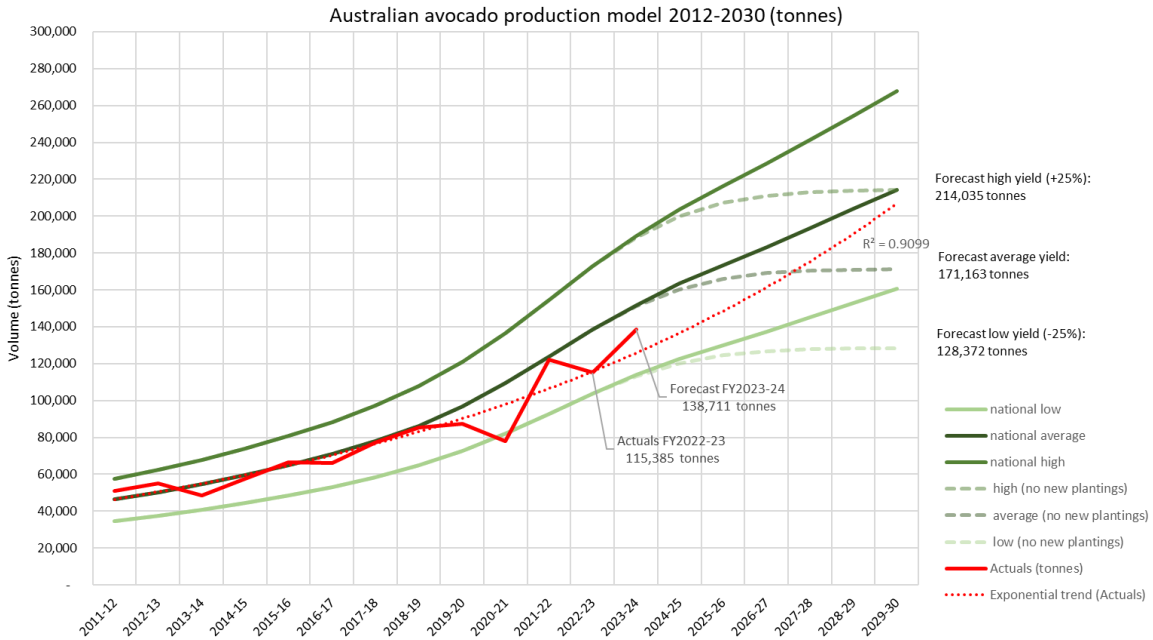
Regional yield estimates are developed based on typical yield per age of plantings for each of the main production regions. Yields curves have different productive thresholds and reach their maturity plateau differently in each region due to environmental factors. The data for each region is collated to provide a national long-term forecast.

From the estimates we derive possible lower and upper bounds (±25%) for how much fruit can be produced by hectare in each region. The projected yearly planting rate can be adjusted as well, to display the effect of new planting rates on the steepness of the projection.

The model starts from 2012 due to availability of more complete Infocado data to track against the model. Based on average yield estimates, the model predicts about 170,000t by 2025-26. This would mean a production volume 41% higher than the production volume of FY2021-22, back when Western Australia had its largest ever crop.

Understanding these trends allows industry to better plan for the future, it helps us to understand the rate at which the market must be expanded, both domestic and export.

Figure 1 - Australian avocado production model 2012-2030 (tonnes)



3. Packhouse participation rate.

One of the criteria for assessing the success of the project is the level of data contribution. The high rate of participation to date confirms the importance of data in decision making. Only packhouses who participate are provided with timely access to the data. The data has been particularly relevant during times of rapid increase in supply, such as the recent challenging season of FY2021-22, which highlights the importance and high value of this data for industry.

The table below shows the percentage of fruit volume that comes from participating packhouses, for each financial year, by region. The remaining percentage is captured indirectly (on a quarterly basis) through other means such as phone calls, and the full picture is presented in our Infocado Quarterly Reports. The average at the bottom of the table is weighted by the volume produced in each region.

Table 1 - Packhouse on-line participation rate over time and end of project participation figures

Region	FY2020-21	FY2021-22	FY2022-23	Number of businesses FY2022-23	Volume for FY2022-23
North QLD	77.59%	85.08%	91.82%	30	7,417,266
Central QLD	93.38%	93.74%	93.37%	11	4,974,295
Sunshine Coast[2]	74.41%	70.83%	71.39%	3	114,927
South QLD	80.31%	85.15%	87.72%	8	1,102,490
Tamborine/N. Rivers[2]	75.78%	69.40%	66.28%	6	152,829
Central NSW	97.89%	97.10%	97.00%	3	1,658,243
Tristate[1]	69.04%	69.32%	66.92%	11	1,780,443
WA/NT	97.16%	97.84%	98.24%	13	3,778,569
Weighted Average / Total	**88.42%**	**90.89%**	**92.81%**	**86**	**20,979,062**

[1] Tristate's representation rate declined from FY2021-22 to FY2022-23 because of new volume information of a large non-participating operation in the region that came to light that year.

[2] Tamborine / Northern Rivers and Sunshine Coast are regions in decline with few businesses, year-on-year fluctuations in supply reported are exacerbated by the low number of participating packhouses.

4. Data verification.

The data verification aspect of this project cross-checks and verifies collected data with suitable sources and/or techniques in a timely manner to ensure accurate, valid, consistent, and reliable reporting. This is a key to maintaining the trust and participation of our stakeholders, with regard to avocado industry and market data.

This project collects the following three types of data which are verified:

1. Avocado supply volumes into the Australian market.
2. Seasonal crop forecasts
3. Annual avocado orchard tree count.

Table 2 – Infocado dispatch volume verification against levied volume

Financial Year	Levied Volume (Kg)	Infocado Volume (Kg)	% covered
FY2020-21	80,571,479	78,080,156	96.91%
FY2021-22	142,595,908	122,197,400	85.69%
FY2022-23*	55,026,348	55,132,215	100.19%

*Q1 & Q2

5. Viewership, click rates

All industry reporting to date has been delivered to satisfy quality, frequency, and timely requirements.

In addition to the number of industry participants who receive our reports directly, according to Google Analytics, the below are the number of visits made to reports published on our website between 1 September 2020 and 21 September 2023:

1. The weekly and quarterly Infocado reports (shared URL) (https://avocado.org.au/our-programs/supply-chain-data/infocado/) had 9,160 total page views.

2. The retail pricing report (https://avocado.org.au/our-programs/supply-chain-data/retail-pricing/) had 15,069 total page views.

3. The Facts at a Glance report (https://avocado.org.au/wp-content/uploads/2021/10/2020-21_AAL-Facts-at-a-glance3.pdf) had 7,252 total page views.

4. The OrchardInfo report is emailed annually directly to ~650 contributing growers exclusively.

Outputs

Table 3. Output summary

Output	Description	Detail
Program logic and monitoring and evaluation plan.	A program logic and monitoring and evaluation plan with linkage to Hort Innovation and industry/fund objectives. Including minimum participation rates for each system, and targets to grow participation through the life of project	Delivered to Horticulture Innovation Australia Limited with milestone report MS102 in March of 2021.
Project risk register	A project risk register outlining every possible threat that could cause a failure in the project's delivery, and how each risk would be managed.	
Stakeholder engagement/communication plan	Stakeholder engagement/communication plan outlines who our stakeholders are, and reason, method, and timing of the engagement.	
Data verification schedule	The schedule outlines the data sets to be verified, the appropriate verification source/s or techniques, the frequency and timing, and any verification reporting needs to ensure accurate, valid, consistent, and reliable reporting. The schedule developed during AV16006, provided a framework and methodology for verification activities appropriate to AV20000. Three types of data verified under this schedule: • Avocado supply volumes into the Australian market. • Seasonal crop forecasts. • Annual avocado orchard tree census.	A data verification update has been provided with each milestone report as outlined in the schedule.
6-monthly milestone status reports and a final report.	Milestone reports informed Horticulture Innovation Australia Limited about the progress and achievements of the project for a 6-month period. A final report (this report) where the end of project outcomes and performance are communicated.	6-monthly milestone status reports MS102 – MS106 and a final report (MS190) have been satisfactorily delivered.
Weekly Infocado Reports	These reports assist the industry to supply avocados more consistently throughout the year, thus helping optimise fruit quality at retail level and support a more stable market. The data also assists with planning industry marketing activities throughout the year. It includes: • Weekly dispatches from packers by region or origin and variety. • Projected weekly dispatches for the following four weeks.	Delivered to Horticulture Innovation Australia Limited, and around 250 industry recipients every Tuesday, except when public holidays fall on Mondays or Tuesdays, then it is delivered on Wednesdays. The reports are made publicly available on Avocados Australia's website with a 6-week lag: https://avocado.org.au/our-programs/supply-chain-

	• Pre-season, updated seasonal forecasts, and harvest progression by region. • Dispatch and forecast data out of New Zealand. • Graphs displaying trends 6-monthly trends by region or origin and variety. • Relevant commentary about the market for the week, and updates on current marketing activities.	data/infocado/#WeeklyReports
Weekly Retail Price Reports	Retail prices of avocados on stores in major capital cities, of single fruit, pre-packed, organics, etc.	Delivered to Horticulture Innovation Australia Limited, and around 250 industry recipients every Wednesday. The reports are made publicly available on Avocados Australia's website with a 6-week lag: https://avocado.org.au/our-programs/supply-chain-data/retail-pricing/
Quarterly Infocado Reports	Quarterly report represents complete and broader view of the industry, utilising monthly 'seasonal' data, and including data from packers not currently participating in the Weekly Infocado. They include dispatches and forecasts for twelve months past and forward by month, source region and variety including data from New Zealand.	Delivered to Horticulture Innovation Australia Limited, and around 250 industry recipients at end of quarter in January, April, July, and October The reports are made publicly available on Avocados Australia's website with a 6-month lag: https://avocado.org.au/our-programs/supply-chain-data/infocado/#QuarterlyReports
Annual OrchardInfo Reports	The data collected on the annual industry tree census supports long-term industry and individual business planning. It includes the number of trees and area planted, year planted, variety and tree density. The report presents a picture of Australia's production capacity, the size profile of productive units across the country, varietal composition, among other details of interest to growers.	Report delivered to Horticulture Innovation Australia Limited and emailed directly to around ~650 contributing growers at the end of each year.
Global trade reports	This reporting system shows global avocado production and trade, regularly updated as new data becomes available: • Global Markets and Trade reports produced each year around October. • 6 yearly export reports (3 calendar and 3 financial year). • 36 monthly reports - export, key market imports and Australian imports. • Ongoing weekly reports with analysis from DAFF data.	Reports made available on the Best Practice Resource (BPR) and promoted to industry. The data is also used to inform export strategies. Please refer to appendices I to M for examples of these reports.
'Facts at a Glance' statistics snapshot	Facts at a Glance uses data sourced from Infocado, the Australian Bureau of Statistics, and contributing consultants to provide a snapshot of the industry's	Delivered to Horticulture Innovation Australia Limited, and published after the end of each financial year on

	key statistics, showing production performance by region and long-term industry forecasts. The report Includes: • National production figures by region, tonne, and trays. • Harvesting periods for Shepard and Hass. • Production by variety. • Avocado consumption. • Export markets.	Avocados Australia Ltd.'s website on: https://avocado.org.au/news-publications/statistics/
'Talking Avocados' magazine articles, and	1-2 articles each quarter	Regular articles with key information have been disseminated through outputs of the Avocado Communication Program (AV21004). Please refer to appendix C 'Outputs Table' to see all articles published.

Outcomes

Table 4. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Industry access to up-to-date, relevant, and scalable information concerning past, current and forecast seasonal product dispatch to inform in-season marketing and supply chain engagements for avocado growers and producers	Avocado SIP 2022-26 - Outcome 1: Demand creation Avocado SIP 2022-26 - Outcome 4: Business insights	Weekly and Quarterly Infocado Reports including dispatch and forecast information, emailed to participants, and published on Avocados Australia's website. The information contained in these reports is communicated to retailers by our Market Development Manager, to inform decisions that will smoothen seasonal transitions, making retail marketing campaigns more effective by anticipating changes in supply, increasing the throughput of fruit in periods when it is most needed. Key findings are disseminated on the appropriate channels through the Avocado industry communications program (AV21004).	https://avocado.org.au/our-programs/supply-chain-data/infocado/
Industry informed of the medium/long-term outlook for production through annual forecast reports to support strategic planning	Avocado SIP 2022-26 - Outcome 2: Industry supply, productivity, and sustainability Avocado SIP 2022-26 - Outcome 4: Business insights	The long-term forecast model presented in our yearly statistics handbook 'Facts at a Glance' and presented at industry events, is a multiyear projection based on tree census data and typical yield curves for each growing region. The forecast informs the industry about the likely production outlook, a number of years into the future.	https://avocado.org.au/wp-content/uploads/2022/10/2021-22_AAL-Facts-at-a-glance.pdf
Industry participants are able to make more informed decisions with regards to export and import schedules through the availability and analysis of trade data and intelligence	Avocado SIP 2022-26 - Outcome 2: Industry supply, productivity, and sustainability Avocado SIP 2022-26 - Outcome 4: Business insights	A suite of weekly, monthly, and annual reports, communicating information about the status and trends of global trade are available on Avocados Australia's Best Practice Resource, emailed to the appropriate audiences, and key findings disseminated through the Avocado industry communications program (AV21004).	https://avocado.org.au/best-practice-resource/export/export-reports/
A culture of data use and objective decision making by the avocado industry	Avocado SIP 2022-26 - Outcome 4: Business insights	Consistently high participation rate from industry stakeholders is evidence of the culture of data use and objective decision making by the avocado industry. For more detail on this please refer to 'participation rate' and 'data validation' sections above, as well as the results from our 2023 Infocado Survey found in the results and discussion section.	These end of project survey results clearly show the value of the data to participating businesses: 95% of them agree or strongly agree with the importance of a supply/demand balance to optimise returns for growers and deliver high quality avocados for consumers; 84% of

			responding businesses agree or strongly agree Infocado is a useful tool to help balance supply and demand; 89% agree or strongly agree that Infocado provides a good representation of the supply status, and 83% agree or strongly agree that the information helps with making informed business decisions.
Access to reliable industry data to assess changes in supply and orchard productivity performance	Avocado SIP 2022-26 - Outcome 2: Industry supply, productivity, and sustainability Avocado SIP 2022-26 - Outcome 4: Business insights	We have attempted to collect, analyse, and report on productivity data, however the response has repeatedly been very poor. Note new benchmarking project (AV22004: Avocado Industry Benchmarking) has been commissioned that will have the resource capacity to collect reliable productivity data.	
A balanced domestic market where supply meets demand to provide optimum returns to the value chain and high quality for consumers.	Avocado SIP 2022-26 - Outcome 2: Industry supply, productivity, and sustainability Avocado SIP 2022-26 - Outcome 4: Business insights	Supply has exceeded demand, but industry is well informed of future supply projections. Planting data shows a sudden decline in new plantings in response to supply/demand dynamics.	OrchardInfo orchard census report (emailed to contributing growers and Hort Innovation)

Monitoring and evaluation

Table 5. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
1. To what extent has the project achieved its expected outcomes?	The consistently high participation levels throughout the life of the project, in addition to the results from the end of project survey we carried out, are evidence that the project has supported industry and business planning through the provision of data that enables a balance in supply and demand.	We are currently exploring options for collection and reporting of additional datasets (as requested by industry) that will further complement the existing information and provide a more complete picture of the status of the market.
2. How relevant was the project to the needs of intended beneficiaries?	During the last few months of the project, we invited active program participants to have a say about the reports and the system in general. In total 83 active participants responded to the survey. All respondents are key decision makers that represent businesses responsible for over 70% of the volume produced by the avocado industry. The information gathered was aimed at gauging the participants perception on the reports' effectiveness and usefulness. The survey results clearly show the value of the data to participating businesses: 95% of them agree or strongly agree with the importance of a supply/demand balance to optimise returns for growers and deliver high quality avocados for consumers; 84% of responding businesses agree or strongly agree Infocado is a useful tool to help balance supply and demand; 89% believe that Infocado provides a good representation of the supply status, and 83% agree or strongly agree that the information helps with making informed business decisions.	The survey included one open question for participants to describe changes or improvements to the system and/or reports, they may deem necessary, this helped us gaining further insight on possible improvements to incorporate to our system and reports, and ultimately provide our industry with the best data possible. There were suggestions given in some of the responses that we are currently considering adopting. These suggestions will be explored further. See appendix D 'Survey Feedback'
3. How well have intended beneficiaries been engaged in the project?	The intended beneficiaries have been very engaged in the project at various levels. As direct contributors, the growers, packers, consolidators, and wholesalers have been actively involved in providing data and receiving the reports on either a weekly, quarterly, and annual basis. The target engagement levels for data contribution have been achieved and, in many cases, exceeded. Overall, the national average participation rate in the Infocado program, weighted by the volume produced in each region, is around 90%. This can be taken as confirmation of the usefulness of the information and the industry's engagement with the project.	Ongoing efforts are underway to further increase engagement levels for data contribution through regional visits.

4. To what extent were engagement processes appropriate to the target audiences of the project?	For the first year of the project lockdowns impeded travel and thus engagement was limited. For many avocado growers and packers, visits in person were the preferred form of engagement, this is due to the nature of their daily activities, many avocado growers and packers prefer face-to-face engagement and therefore remote sessions were largely disfavoured during the lockdown period of COVID-19, and plans were made for personal visits once state borders were reopened. Between August 2021 and March 2023, a total of 108 visits to 72 distinct packers in 5 growing regions took place. During these visits many earlier non-participating packers were onboarded to the program, where training sessions on the usage of our new data system were provided, as well as to how to read and interpret our reports, and collecting general feedback.	The current processes are working effectively. We will continue to monitor effectiveness.
5. What efforts did the project make to improve efficiency?	Opportunities to improve efficiencies throughout all aspects of the project, and to improve the ease and accuracy of data collection are ongoing priorities. The AvoData software renewal (software development funded by AAL) has been a fundamental precursor to improved efficiency of processes, user-friendliness, and accuracy of our data.	There are new features and refinements in the pipeline to be incorporated to the AvoData software soon, we expect that these will further enhance our reporting and increase efficiencies. These refinements include a mobile device application with the same functionality as the browser application, to be targeted to users on the move to enter their data and consult reports on the go.

Recommendations

1. As part of a continuous improvement effort, we recommend the reports to be reviewed and refined on an ongoing basis to ensure they are informative and user friendly.
2. We recommend maintaining the ongoing efforts to increase participation in the Weekly Infocado Report. While the participation level in the weekly Infocado Report is currently high, greater participation should remain a high priority.
3. There would be value in developing a method to estimate how reliable the published four-weekly forecasts are based on historical analysis.
4. Introducing sales data in our reports will help industry elucidate a clearer picture of the supply status of the market. There isn't yet a unified position on whether sales data should be reported, and therefore we will be seeking feedback from industry before we are able to proceed.
5. We recommend that extension activities should be implemented to help growers and packers improve their forecasting techniques. Further R&D is needed to assist with crop forecasting methodologies.
6. Industry has expressed strong interest in accessing weekly wholesale market price information. This should be incorporated in future reporting.
7. It has been noted that it would be useful to separate Hass and Shepard on the seasonal progress chart for both North and Central QLD.
8. It is recommended that providing individual packers with end of season summary reports may assist packers to improve forecasting and provide them with other useful data.

Refereed scientific publications.

None to report.

Intellectual property

IP and confidentiality arrangements remain as per the executed research agreement; there are no issues or developments to report.

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Packers:

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Traders:

All Aussie Farmers [Melbourne], Australian Produce Partners Pty Ltd, Costa Avocado (National), Costa Farms [Adelaide], Costa Farms [Melbourne], Delroy Orchards, Deluca Banana Marketing [Brisbane], Etherington [Perth], Exotic Fruit Traders [Sydney], Fresh Choice WA Pty Ltd [Perth], Green Skin Avocados (National), J.H.Leavy & Co [Brisbane], LaManna Premier Group [Adelaide], LaManna Premier Group [Brisbane], LaManna Premier Group [Melbourne], LaManna Premier Group [Sydney], Mackays Marketing Co (National), Montague [Brisbane], Murray Bros [Brisbane], N & A Fruit Distributors Pty Ltd [Sydney], Natures Fruit Company (National), Rock Ridge Fresh (National), Simpson Farms Pty Ltd (National), Sinclair & Antico (Aust) Pty Ltd [Sydney], The Avocado Collective (National), United Fresh [Adelaide], WA Farm Direct [Perth], Watt Export (National)

We'd also like acknowledge all of the 650+ growers who have provided Tree Census data, Wayne Prowse (Fresh Intelligence Consulting) for producing the global trade report suite for this project, and Garry Goucher (Garry Goucher and Associates) for his work on estimating the price demand elasticity of avocados.

Appendices

A. Data Verification
B. Monitoring and Evaluation Plan
C. Outputs Table
D. Survey Feedback
E. OrchardInfo Tree Census Report
F. Infocado Weekly
G. Retail Pricing Report
H. Infocado Quarterly
I. Weekly export update
J. Monthly export update
K. Exports and imports
L. Global export markets and trade
M. Producers / competitors

Appendix A - Data Verification

Table 1: Annual dispatch volume verification for each quarter.

Quarter	2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2
Period	Jul-Sep 2020	Oct-Dec 2020	Jan-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Oct-Dec 2021	Jan-Mar 2022	Apr-Jun 2022	Jul-Sep 2022	Oct-Dec 2022	Jan-Mar 2023	Apr-Jun 2023
Infocado (Kg)	18,389,877	11,492,954	15,437,895	32,764,325	33,185,246	30,941,009	28,714,516	29,356,630	31,863,579	23,271,600	26,634,245	33,615,413
DAFF Levied volume (Kg)	21,376,649	12,853,575	13,204,401	31,382,989	38,222,013	36,162,914	33,619,265	35,551,201	29,125,192	25,883,524	24,254,229	34,673,915
% Covered by Infocado	86.03%	89.41%	116.91%	104.40%	86.82%	85.56%	85.41%	82.58%	109.40%	89.91%	109.81%	96.95%
Year weighted average %	99.70%				85.14%				101.61%			
Total weighted average %	94.43%											

Table 2: Annual dispatch volume verification for each quarter.

January - December seasons	2020 (Jan-Dec)		% difference	2021 (Jan-Dec)		% difference	2022 (Jan-Dec)		% difference
	Forecast	Dispatch		Forecast	Dispatch		Forecast	Dispatch	
North Queensland	3,717,308	4,174,294	12%	5,182,969	6,790,473	31%	5,819,890	5,775,121	-1%
Central Queensland	3,671,521	2,377,369	-35%	3,561,985	4,009,781	13%	3,941,804	4,244,890	8%
Season's weighted average % difference			**-5%**			**24%**			**3%**

April - March seasons	2020-21 (Apr-Mar)		% difference	2021-22 (Apr-Mar)		% difference	2022-23 (Apr-Mar)		% difference
	Forecast	Dispatch		Forecast	Dispatch		Forecast	Dispatch	
Sunshine Coast	178,794	113,721	-36%	160,776	148,148	-8%	129,733	105,095	-19%
Southern Queensland	555,299	408,249	-26%	627,887	914,478	46%	997,149	1,146,575	15%
Tamborine/Northern Rivers	273,145	176,175	-36%	256,607	221,309	-14%	192,117	152,514	-21%
Central NSW	1,655,661	1,410,299	-15%	1,180,734	1,094,762	-7%	1,409,985	1,575,191	12%
Season's weighted average % difference			**-20%**			**12%**			**10%**

July - June seasons	2020-21 (Jul-Jun)		% difference	2021-22 (Jul-Jun)		% difference	2022-23 (Jul-Jun)		% difference
	Forecast	Dispatch		Forecast	Dispatch		Forecast	Dispatch	
Tri State	378,636	436,261	15%	1,087,808	1,600,988	47%	1,436,084	1,780,443	24%
WA	3,000,805	2,463,135	-18%	8,979,080	8,602,890	-4%	4,406,995	3,778,569	-14%
New Zealand	3,230,548	4,255,227	32%	3,202,004	2,342,460	-27%	2,677,250	1,832,300	-32%
Season's weighted average % difference			**14%**			**-2%**			**-11%**

Appendix B – Monitoring and Evaluation Plan

Table 3: Project monitoring plan

Logic level	What to monitor	Performance expectation (KPIs) and/or monitoring questions	Data collection – method (e.g. survey) and source	Timing of, and responsibility for, data collection	Progress to date
Foundational activities	Plan and manage project and budget	Project planning documents completed and sent to Hort, milestone deadlines are met, budget is adhered to.	Record keeping (Avocados Australia Ltd).	At MS102, and quarterly (project lead and data analyst).	Project planning documents included in the appendix of this report
Activities and outputs	Implement engagement plan. Percentage of industry representation improves or remains at milestone KPIs	Continued weekly, seasonal. quarterly and annual engagement, including reminders, to ensure continued or increased participation in the Infocado and OrchardInfo programs. Complete one visit to each major production region annually, with an additional visit, where indicated to larger producing areas. Regional visit schedules provide an opportunity for all local Infocado contributors to meet with project team; and at least one on-orchard visit per region where practical. Complete one visit per year to each of four central markets in major avocado trading cities Has industry stakeholder participation and engagement in the Infocado and OrchardInfo programs been maintained or increased above the milestone requirements? (Avocado supply data represents at least 85% of market & orchard planting data represents at least 85% of all plantings)	Record engagement feedback. Keep records of information gathered from growers and data contributors in the visits. Verify participation rates via ABS and levy receipts.	Engagement activities are continual and ongoing (data analyst). Regional visits: Intermittent (data analyst). Verification: quarterly and annual (data analyst).	Avocados Australia is active in its ongoing industry engagement with a participation rate that meets and exceeds requirements. For reference, please consult the data verification update in appendix A. Regional and market visits have been put on hold while COVID restrictions have been in effect, however as these are lifted, these visits will resume.
	Delivery of industry reporting.	Avocado industry reporting delivered on schedule to contributors and industry stakeholders as below: Infocado weekly reports distributed via email to contributors each working week and published to	Record keeping, and AAL website.	Data analyst is responsible; monitoring to occur quarterly, or annually	All industry reporting to date has been delivered to satisfy quality, frequency, and

		the AAL website on a six-week delay. Infocado quarterly reports distributed via email to contributors each quarter and published to the AAL website on a six-month delay. OrchardInfo Tree Census is distributed annually via email to contributors only. Annual industry statistics are published to the AAL website each year for the previous year. Global avocado trade reporting in accordance with the Global trade data analysis framework developed under AV16006 (Q2 2018).		depending on timings at left.	timely requirements.
	Data verification.	Infocado annual Australian market supply volumes are verified using levy receipts. Season forecast verification will be carried out at end of season, against supply volumes for the season. OrchardInfo Tree Census is annually verified against ABS data.	Record keeping. DAWR levy receipts. ABS data.	Data analyst is responsible; monitoring to occur continuously as verification sources become available.	Data verification has been carried out as per schedule. For reference, please consult the data verification update in appendix A.
	Project communication to stakeholders.	Project information and results are communicated through the Avocado Communication Program and increase stakeholder awareness of project value and outcomes: A minimum of two project related articles are published in each quarter in the avocado industry magazine Talking Avocados, at least one of these will be a report of industry data, the other will be ad hoc, or relating to project results or upcoming activities. Reminders and notification about project activities will be published in the fortnightly newsletter Guacamole, expected to be at least once a month.	Communication outputs can be tracked in Guacamole and Talking Avocado editions.	Data analyst is responsible; monitoring to occur quarterly, or annually depending on timings at left.	Key results derived from industry reporting have been communicated to industry through products of the Avocado Industry Communications program AV18003 as required.
Intermediate outcomes.	Data collection and delivery mechanisms are	Efficient data capture and reporting processes are implemented. Engagement and training are provided to	Record keeping.	At end of project (project lead, data analyst)	Data system features are being incorporated to improve the efficacy

	implemented which optimise data collection and reporting capacity, and which encourage a culture of data-driven decision making in the avocado industry.	contributors.			of data capture and reporting.
	The relevance of the data we collect, analyse and report, and whether it informs the industry's decision making.	Maintaining participation rate over 80% in Infocado and OrchardInfo. Ongoing voluntary participation is an indicator of the value of the data to individual business decision making.	Infocado / OrchardInfo Records.	Data analyst is responsible; monitoring is ongoing.	High rate of participation to date confirms the importance of data in decision making. Only those who contribute are provided with timely access to the data.
End-of-project outcomes.	Provide data which helps to support industry and business planning to enable a balance in supply and demand. This in turn will help to optimise returns for growers and deliver high quality avocados for consumers.	Analysis of supply and demand balance as indicated by price stability and quality over time.	Industry trend analysis. Wholesale market data reports showing trends in market prices. Results from retail quality monitoring (AV19003).	Data collected throughout the project (project lead, data analyst).	Evaluation to be carried out at end of project.
		Seasonal supply data regularly informs SIAP decisions.	Feedback from HIA industry strategic partner.	Annual.	
		Marketing campaigns are demonstrably in alignment with data reported.	Marketing annual reports.	Annual.	
		Supply data assists retailers in seasonal transitions.	Feedback from Market Development	Biannual.	

			Manager.		
		Data presented in the OrchardInfo informs industry and business planning.	Dissemination of reports and projections.	Ongoing.	
		All our reports support the avocado industry's strategy outcomes as stated in the Avocado strategic investment plan 2022-26.	Data is referenced in Avocado SIP.	Ongoing.	
		Global trade reports are utilised by the export reference group in planning and monitoring global trade	Feedback from project reference group.	Ongoing.	

Appendix C – Outputs Table

Table 4: Outputs Table

Output	Issue	Content	Delivered on	Available at
Infocado weekly	Week 33 of 2020 until week 39 of 2023	Weekly dispatch & forecast figures	18/08/2020 until 29/09/2023	https://avocado.org.au/our-programs/supply-chain-data/infocado/
Infocado quarterly	2020 Q3 (October 2020)	Seasonal figures October 2019 - September 2021	23/10/2020	https://avocado.org.au/our-programs/supply-chain-data/infocado/
	2020 Q4 (January 2021)	Seasonal figures January 2020 - December 2021	15/02/2021	

	2021 Q1 (April 2021)	Seasonal figures April 2020 - March 2022	24/04/2021	
	2021 Q2 (July 2021)	Seasonal figures July 2020 - June 2022	24/07/2021	
	2021 Q3 (October 2021)	Seasonal figures October 2020 - September 2022	23/10/2021	
	2021 Q4 (January 2022)	Seasonal figures January 2021 - December 2022	25/01/2022	
	2022 Q1 (April 2022)	Seasonal figures April 2021 - March 2023	6/05/2022	
	2022 Q2 (July 2022)	Seasonal figures July 2021 - June 2023	5/08/2022	
	2022 Q3 (October 2022)	Seasonal figures October 2021 - September 2023	2/11/2022	
	2022 Q4 (January 2023)	Seasonal figures January 2022 - December 2023	10/02/2023	
	2023 Q1 (April 2023)	Seasonal figures April 2022 - March 2024	28/04/2023	
	2023 Q2 (July 2023)	Seasonal figures July 2022 - June 2024	20/07/2023	
OrchardInfo	2020	Plantings data up until August 1 2020	4/12/2020	

	2021	Plantings data up until August 1 2021	17/12/2021	Distributed to contributing growers and Hort Innovation
	2022	Plantings data up until August 1 2022	15/12/2022	
Facts at a glance	2020	Figures for the financial year 2019-20	30/10/2020	https://avocado.org.au/news-publications/statistics/
	2021	Figures for the financial year 2020-21	30/09/2021	
	2022	Figures for the financial year 2021-22	24/10/2022	
Export Reports	Weekly Export/Import Update	52 / year x 1-page reports showing weekly export information.		https://avocado.org.au/best-practice-resource/export/export-reports/
	Monthly Export/Import Update	12/year x 1-page reports showing latest month and year to date exports comparison to the previous year and Moving Annual Total (MAT) by volume.		
	2020 Global market report avocado producers and market suppliers	1-page market profile report for each of the leading 10 producing countries production and export trade by volume, price and consumption (to latest calendar year), including key Latin American suppliers Mexico, Peru and Chile with analytics and commentary.	30/10/2020	
	2020 Global market report: avocado import markets	2-page market profile report for each of the top 5 importing countries and the 10 countries listed in the export review AV16011 showing 5-year import /	24/10/2020	

		export trade by volume, price, and consumption (to latest CY 2019) with analytics and commentary.		
	2021 Avocado Global Market Trends	12-page reports involving data tables, analytics, graphs, and basic commentary in a Power Point format with supplementary excel sheets meeting the needs of section using supplied Hort Innovation graphics.	3/11/2021	
	2021 Global Market Report - Avo Producers & Market Suppliers	1-page market profile report for each of the leading 10 producing countries production and export trade by volume, price and consumption (to latest calendar year), including key Latin American suppliers Mexico, Peru and Chile with analytics and commentary.	30/10/2021	
	2022 Avocado Global Market Trends	12-page reports involving data tables, analytics, graphs, and basic commentary in a Power Point format with supplementary excel sheets meeting the needs of section using supplied Hort Innovation graphics.	1/11/2022	
	2022 Global market report avocado producers and market suppliers	1-page market profile report for each of the leading 10 producing countries production and export trade by volume, price and consumption (to latest calendar year), including key Latin American suppliers Mexico, Peru and Chile with analytics and commentary	1/11/2022	

	2022 Global Trade Report - Australian avocado exports & imports	12-page reports involving data tables, analytics, graphs, and basic commentary in a Power Point format with supplementary excel sheets meeting the needs of section using supplied Hort Innovation graphics.	15/08/2022	
	2023 Global Trade report - Australian avocado exports & imports	12-page reports involving data tables, analytics, graphs, and basic commentary in a Power Point format with supplementary excel sheets meeting the needs of section using supplied Hort Innovation graphics.	15/02/2023	
	Import & Export Report - January-December 2020	12-page reports involving data tables, analytics, graphs, and basic commentary in a Power Point format with supplementary excel sheets meeting the needs of section using supplied Hort Innovation graphics.		
	Import & Export Report - July 2020-June 2021	12-page reports involving data tables, analytics, graphs, and basic commentary in a Power Point format with supplementary excel sheets meeting the needs of section using supplied Hort Innovation graphics.		
Talking Avocados	Spring 2020	Positive trends for the Australian avocado industry	30/10/2020	

	Spring 2020	Where are all the missing trees?	30/10/2020	Distributed to members, all growers, other stakeholders, and Hort Innovation
	Summer 2021	Avocados for India?	29/01/2021	
	Summer 2021	National orchard continues to grow	29/01/2021	
	Autumn 2021	2020 export market analysis	30/04/2021	
	Autumn 2021	Building confidence in industry data	30/04/2021	
	Winter 2021	AvoData: tracking fruit flow	30/07/2021	
	Spring 2021	Long-term production forecast	29/10/2021	
	Spring 2021	Building a data driven culture for avocado export	29/10/2021	
	Spring 2021	2021 Export Market Analysis	29/10/2021	
	Summer 2022	Orchard Census Update	28/01/2022	
	Autumn 2022	AvoData welcomes new contributors!	29/04/2022	
	Winter 2022	Global Avocado Trade Update	29/07/2022	
	Winter 2022	Mapping trees - Why do we do it	29/07/2022	

	Spring 2022	2021-22 Australian Avocado Export/Imports Update	28/10/2022	
	Spring 2022	Facts at a Glance 2021-22	28/10/2022	
	Summer 2023	2022 Global Market Analysis	27/01/2023	
	Summer 2023	Orchard Census Update	27/01/2023	
	Autumn 2023	Export Market Analysis - India	28/04/2023	
	Autumn 2023	End-of-season forecast verification for 2022 seasons.	28/04/2023	
	Autumn 2023	Infocado Survey: Preliminary Results	28/04/2023	
	Winter 2023	Export Market Analysis - Thailand	08/2023	
	Winter 2023	Avocados Australia Export Report Suite	08/2023	
	Spring 2023	10 years of data verification	11/2023	
	Spring 2023	Varroa Response in New South Wales	11/2023	
	Spring 2023	AARSC update	11/2023	
	Spring 2023	Global trade update	11/2023	

Appendix D – Survey Feedback

"It has come to my attention that Infocado may need some tweaking when it comes to estimating not just overall numbers but Premium supermarket grade fruit. e.g. When fruit size is down or more damage than expected. Pricing seems to be going on this overall total number and not considering other factors. Also can this overall # can it be crossed checked with total area of production? Infocado can be a useful tool but when not giving out the correct information is actually more detrimental."

"Maybe needs to be simplified for quick/easy viewing? With links to the more complex/detailed data instead. I find it hard to follow and interpret without setting aside time to really concentrate and interpret the data. Perhaps quality reports would also be interesting to see what's impacting the different regions? Some historical data about average prices received by growers from different regions for the previous season?"

"Good as it is now. The reality is that Infocado may influence when a grower mar start harvest or when they might plan to end harvest. However, when a grower starts harvest heshe usually keeps going at a pace that continues the same worker hours from start to finish. It is almost impossible to ramp up harvest rate or slow down harvest rate once harvest starts. Worker availability governs harvest rate. Capiche"

"Cut the users down just to growers at the moment market agents are using the information for a justification of why the price needs to be putted down. We need to still get growers / plackers to contribute information. I'm not use if any information is not 100% right or there are fudge factors in place but if so the data the might be not 100% trust worthy needs to be colour coded."

"It may be beneficial to capture end of week stock on hand expressed as total tray figure and total number of 10kg cartons for each major trader, so it gives a clearer picture of what is being carried into the next week and a true status of volumes for a trading week."

"Dispatch for this week total at the top should also include the non reported dispatch number as a total actual figure."

"infocado should use agents to supply data for domestic, international, and major supermarkets supply, Tho not all fruit dispatched is going to be for domestic markets the weekly pricing is adjusted according to figures supplied"

"More has to be done to understand how a crop is forecasted. If the size profile of the crop is different to what was used when estimating then the actual crop will be impacted."

"Market sales prices instead of major retailers price would be a much better tool to understand and compare for us growers, chain pricing doesn't mean much to us."

"Spilt North Queensland shepherd and hass. Don't put it together with a total count like this year of 6 million? I think it is. Have 2 separate"

"I believe ta simplified data entry system, ie bins picked less reject rate might get better uptake and lead to more accurate reports"

"Infocado to be available to all AAL growers directly- not via packing sheds as this information can sometimes be passed on too slow."

"Detailed summary of weekly packout, to get a picture of what our average size is and to have detailed summary at end of our season."

"Add the previous year dispatch as a square or circle and n the top bars. "

"Give per tray market prices rather than per fruit retail prices."

"Increase forecasts to 6 weeks." "Others that were repeated: higher participation / accuracy, include wholesale prices, stock on hand (sales), volume by destination."

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Hort Innovation
Strategic levy investment
AVOCADO FUND

2022 OrchardInfo Report - Avocados Australia's orchard census report - December 2022.

The OrchardInfo report is compiled using data contributed annually by avocado growers from all Australian growing regions.

Region	Contribution summary				Number of trees				Number of hectares				Density (trees/hectare)		
	Known Growers	Updated 2022	Not Updated	No Record	Recorded	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted averages
North QLD	103	95	1	7	89	568,411	327,670	896,081	22.45%	2,502.76	2,147.46	4,650.22	28.47%	227	153	193
WA/NT	236	191	32	13	210	774,877	629,992	1,404,869	35.20%	1,999.79	2,110.29	4,110.08	25.16%	387	299	342
Central QLD	66	50	11	5	56	360,199	420,901	781,100	19.57%	1,222.27	2,148.54	3,370.81	20.64%	295	196	232
Tristate	98	71	21	6	86	142,149	188,443	330,592	8.28%	474.79	786.05	1,260.84	7.72%	299	240	262
Central NSW	107	81	17	9	89	66,856	177,254	244,110	6.12%	279.32	904.83	1,184.15	7.25%	239	196	206
South QLD	76	52	16	8	60	56,608	131,942	188,550	4.72%	271.20	777.91	1,049.11	6.42%	209	170	180
Tamborine/Northern Rivers	85	57	12	16	53	29,689	57,399	87,088	2.18%	149.59	284.74	434.33	2.66%	198	202	201
Sunshine Coast	44	30	10	4	36	11,454	47,205	58,659	1.47%	35.05	239.24	274.29	1.68%	327	197	214
Region Total	**815**	**627**	**120**	**68**	**679**	**2,010,243**	**1,980,806**	**3,991,049**	**100%**	**6,934.77**	**9,399.06**	**16,333.83**	**100%**	Weighted averages		
ABS Stats 2019-20						764,516	2,429,829	3,194,345						**288**	**211**	**244**

REPORT NOTES:

An individual orchard is defined as a production unit that is associated to a single address in our records. A growing business may consist of one or multiple individual orchards at different addresses. To arrive at the total number of orchards in last year's census, we tallied the multiple individual orchards. For this year's however, we have grouped individual orchards that are relatively adjacent, and managed by the same people.

The source of data is Infocado, via the OrchardInfo tree census unless noted. This report is provided to OrchardInfo contributors and is not intended for wider distribution. The report is based on data provided voluntarily by 92% of all known avocado orchards.

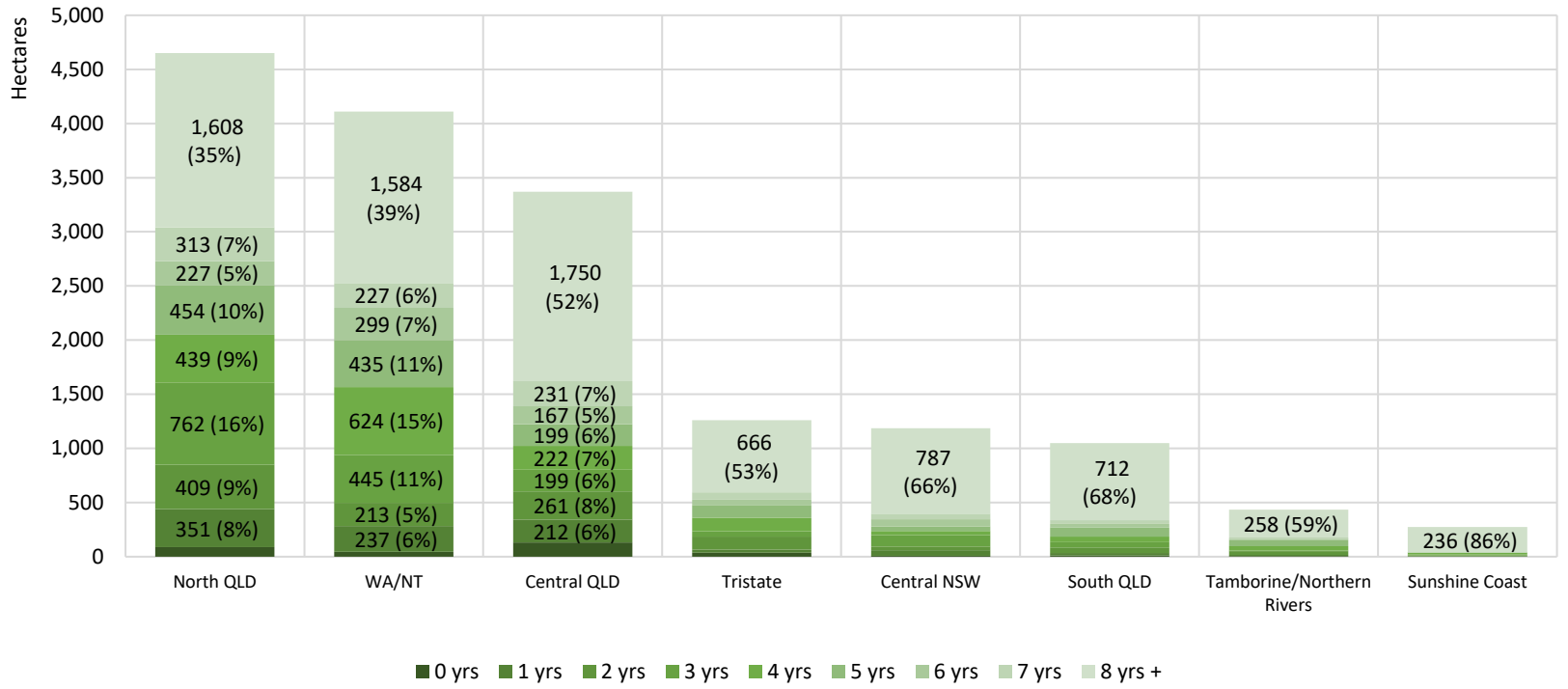
This report has been produced by project AV20000 (Avocado industry and market data capture and analysis) funded by Hort Innovation using the avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

The Australian Tree Crop Map, run by the Applied Agricultural Remote Sensing Centre (AARSC), is an effective tool in case of biosecurity incidents or natural disasters. The number of hectares recorded by the AARSC serve as a reference to compare and validate our own census results. The table below is a comparison between both sets of records by State.

State	Hectares			Diff. %
	AARSC ATCM	AAL OrchardInfo	Difference	
Queensland	10,852	9,441.15	-1,410.85	-13%
Western Australia	4,709	4,094.82	- 614.18	-13%
New South Wales	2,300	1,703.59	- 596.41	-26%
Victoria	993	735.39	- 257.61	-26%
South Australia	409	342.62	- 66.38	-16%
Tasmania	18	15.00	- 3.00	-17%
Northern Territory	-	1.26	1.26	+100%
	19,281	**16,333.83**	**- 2,947.17**	**-15%**

2022 OrchardInfo Report - avocado hectares by regional tree maturity.

Region	0 yrs	1 yrs	2 yrs	3 yrs	4 yrs	5 yrs	6 yrs	7 yrs	8 yrs +	Grand Total	% of Total
North Queensland	87.96	350.52	409.27	762.20	439.17	453.64	226.65	313.21	1,607.60	4,650.22	28.47%
Western Australia / N. Territory	44.98	237.21	212.98	445.39	624.22	435.01	299.11	227.00	1,584.18	4,110.08	25.16%
Central Queensland	129.30	212.17	260.85	199.27	221.65	199.03	167.20	231.01	1,750.33	3,370.81	20.64%
Tristate	34.57	31.06	119.89	46.96	126.96	115.35	49.41	70.31	666.33	1,260.84	7.72%
Central New South Wales	8.50	51.35	34.49	104.37	38.46	42.15	65.14	52.78	786.91	1,184.15	7.25%
South Queensland	8.76	23.22	52.91	47.56	51.19	87.56	29.13	36.74	712.04	1,049.11	6.42%
Tamborine/Northern Rivers	3.90	12.02	34.03	6.05	39.92	53.67	14.08	12.78	257.88	434.33	2.66%
Sunshine Coast	1.15	2.60	6.97	7.80	16.05	0.48	3.03	0.11	236.10	274.29	1.68%
Age Group Total	**319.12**	**920.15**	**1,131.39**	**1,619.60**	**1,557.62**	**1,386.89**	**853.75**	**943.94**	**7,601.37**	**16,333.83**	**100%**
Age Group as % of Total	2%	6%	7%	10%	10%	8%	5%	6%	47%	**100%**	
Age Group Cumulative Total	319.12	1,239.27	2,370.66	3,990.26	5,547.88	6,934.77	7,788.52	8,732.46	**16,333.83**		
Age Group Cumulative Total %	2%	8%	15%	24%	34%	42%	48%	53%	**100%**		



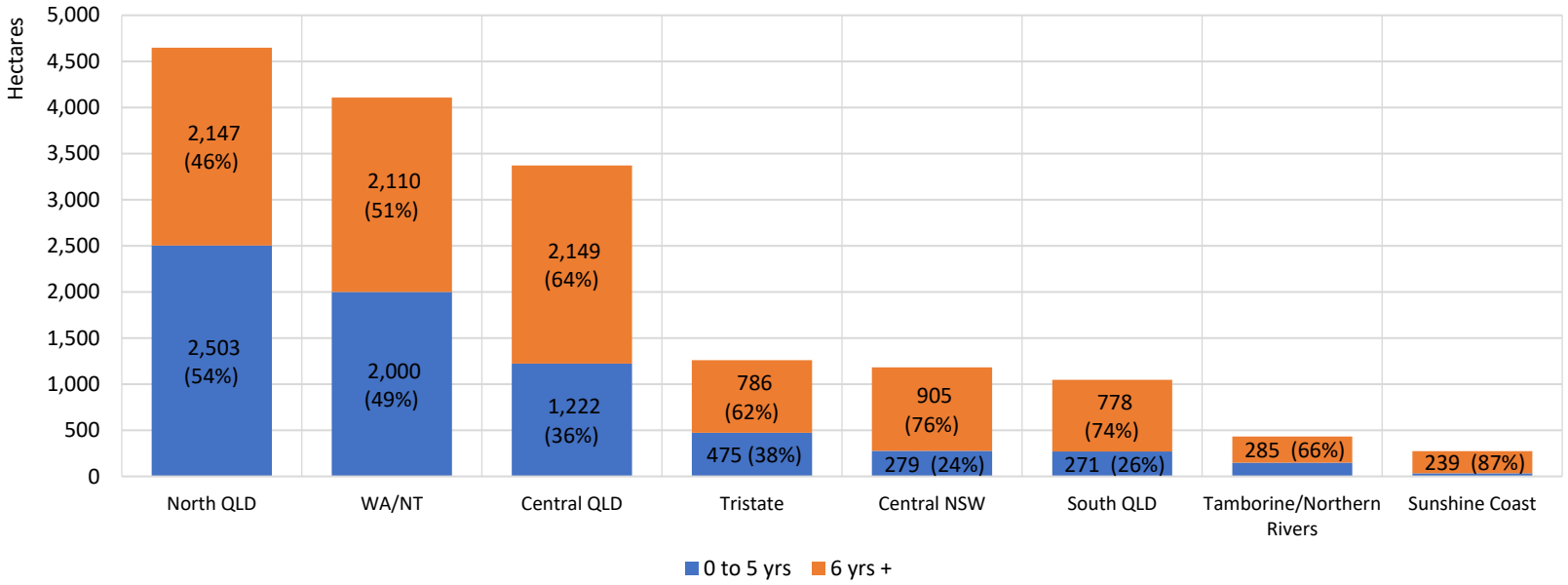
The result of this year's census shows that 42% of plantations in Australia are less than 6 years old. The remaining 58% of hectares are more than 6 years of age, with 47% of them being 8 years +.

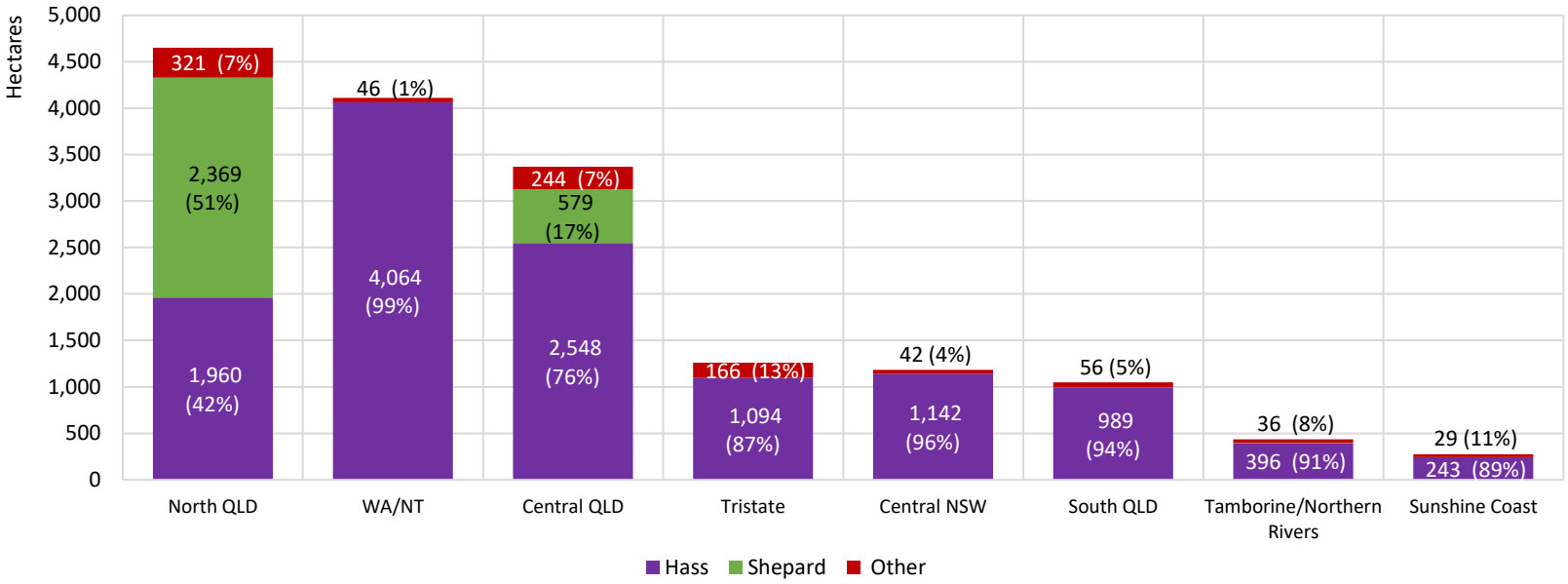
In 2019 North Queensland planted 762.2 hectares, and 1,619 were planted nationally, the largest number of hectares planted in a single year. These hectares are 3 years of age and will soon reach their production maturity.

For the past 8 years North QLD planted an average of 380 (8.2%) hectares per year, the highest of all, followed by WA at 315 (7.2%), and Central QLD at 202 (6%). The industry has planted an average of just over 1,000 hectares a year, representing a 7% YoY growth for that period.

Focusing on the younger group (Age group as % of Total) about 1/3 of total plantings are 2 to 5 years old. This corresponds with a planting peak that occurred in 2018-19, and since then new plantings have been in decline.

2022 OrchardInfo Report - avocado hectares by regional tree maturity and varieties.

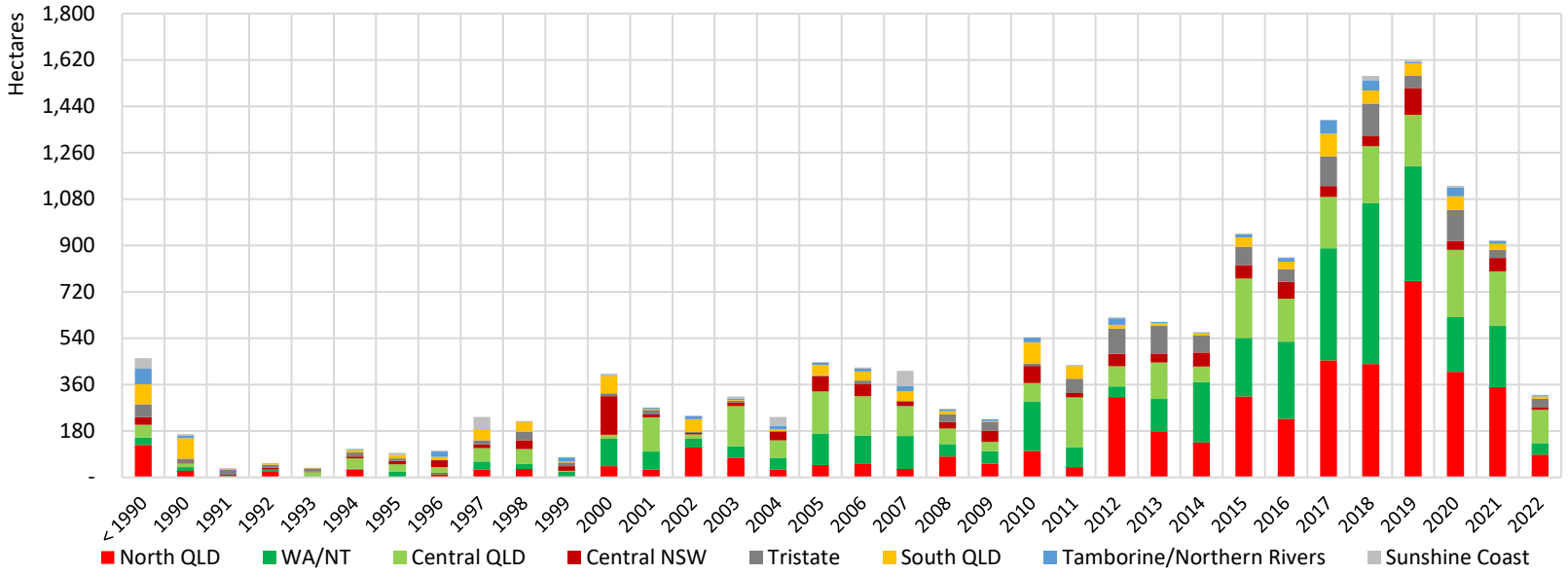


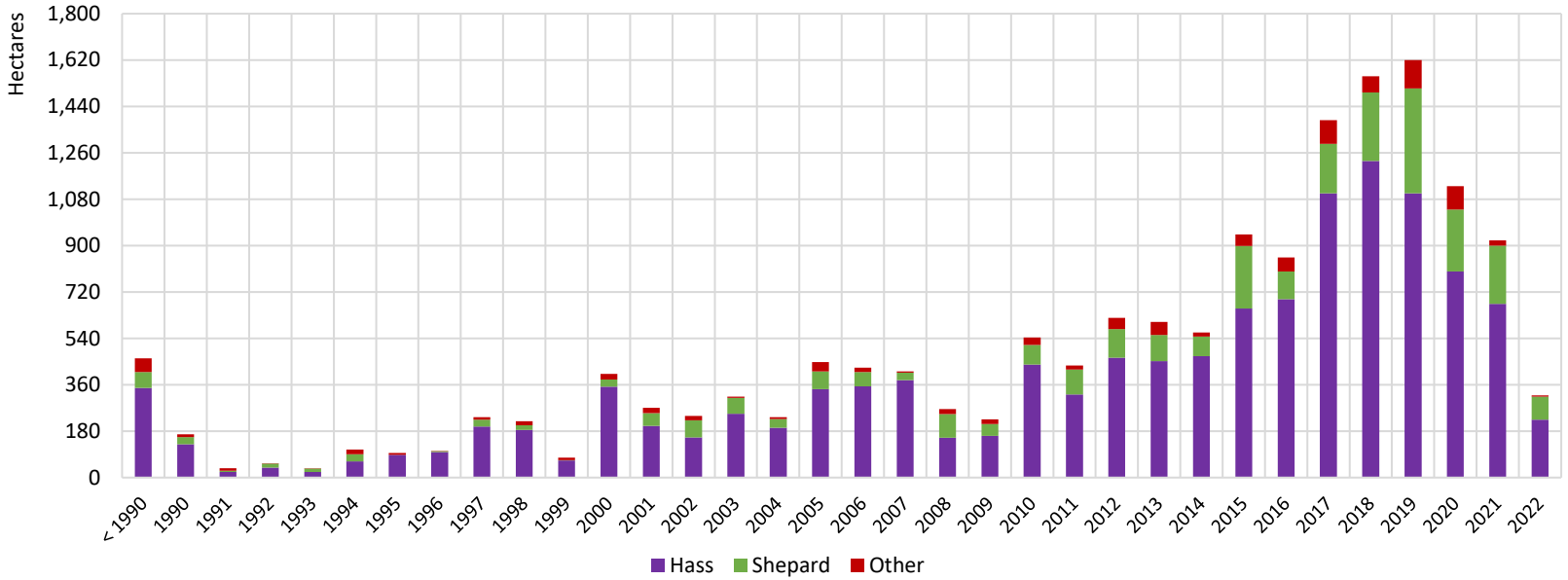


To enhance the contrast between young and more mature planting proportions, all hectares in every region are shown here in two groups: 0 to 5 years of age, and 6 years + of age. This chart shows the regional spread of young hectares which will come into production over the next few years.

Looking at hectares by variety and region this chart shows the regions with the highest proportion of Hass are WA (99%), Central NSW (96%), South QLD (94%), and Tamborine / N. Rivers (91%). The proportion is lower in North and Central QLD, mainly due to the large share of Shepard present in these regions (51% and 17% respectively). These proportions have slightly decreased relative to last year's census due to slightly higher proportions of 'Other' varieties.

2022 OrchardInfo Report - yearly planting by region and variety (hectares).



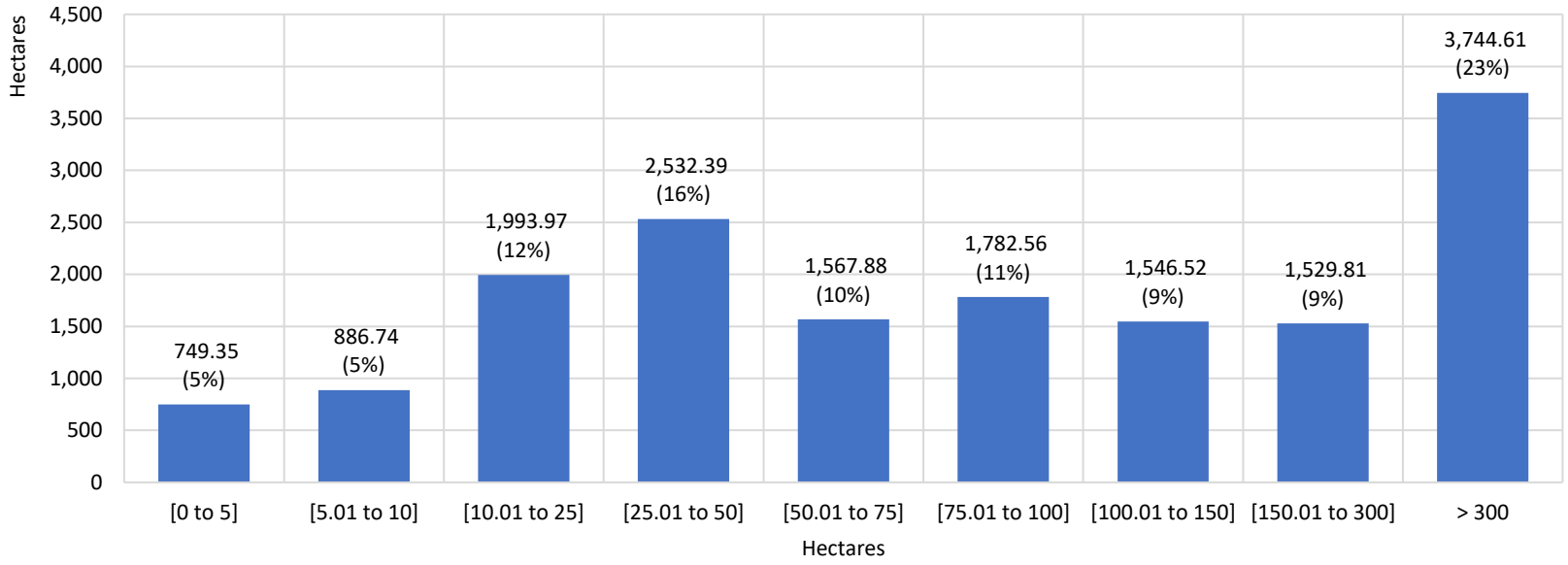


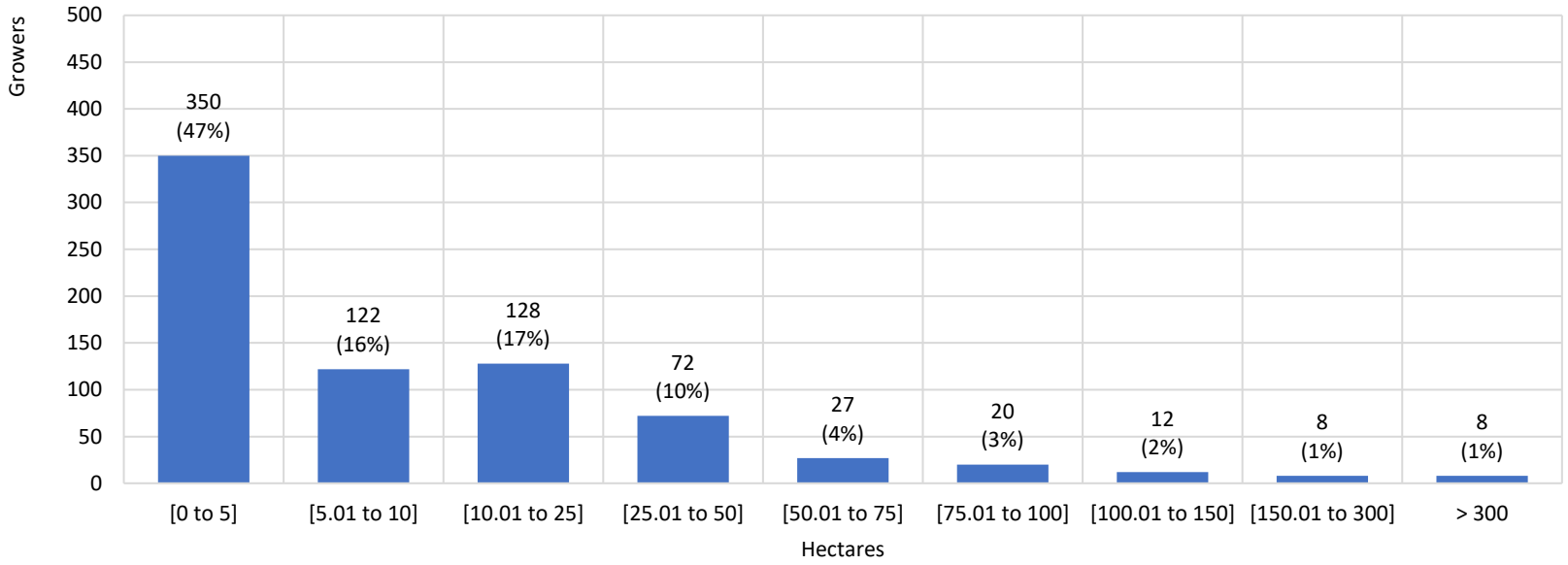
The rate of new plantings in Australia was relatively flat from 2000 until it began ramping up to become nearly exponential in the mid 2010's, to the extent that about half of all trees currently in the ground were planted since 2015. In 2019 plantings peaked (nearly 10% of all trees were planted in that year alone), after which the rate began dropping, and returning to pre-mid 2010's rates of new planting by 2022.

Looking at plantings by region, the data shows that the largest proportion of plantings over the past 10 years have been in North Queensland and Western Australia. These two regions together with Central QLD represent 3/4 of the total area planted.

By variety, the data shows that the ratio of Hass to Shepard to Other has remained roughly constant over time, although Shepard has seen a greater proportion of plantings in the last 3 years, accounting for a lot of the growth in North Queensland.

2022 OrchardInfo Report - orchard size profile distribution.



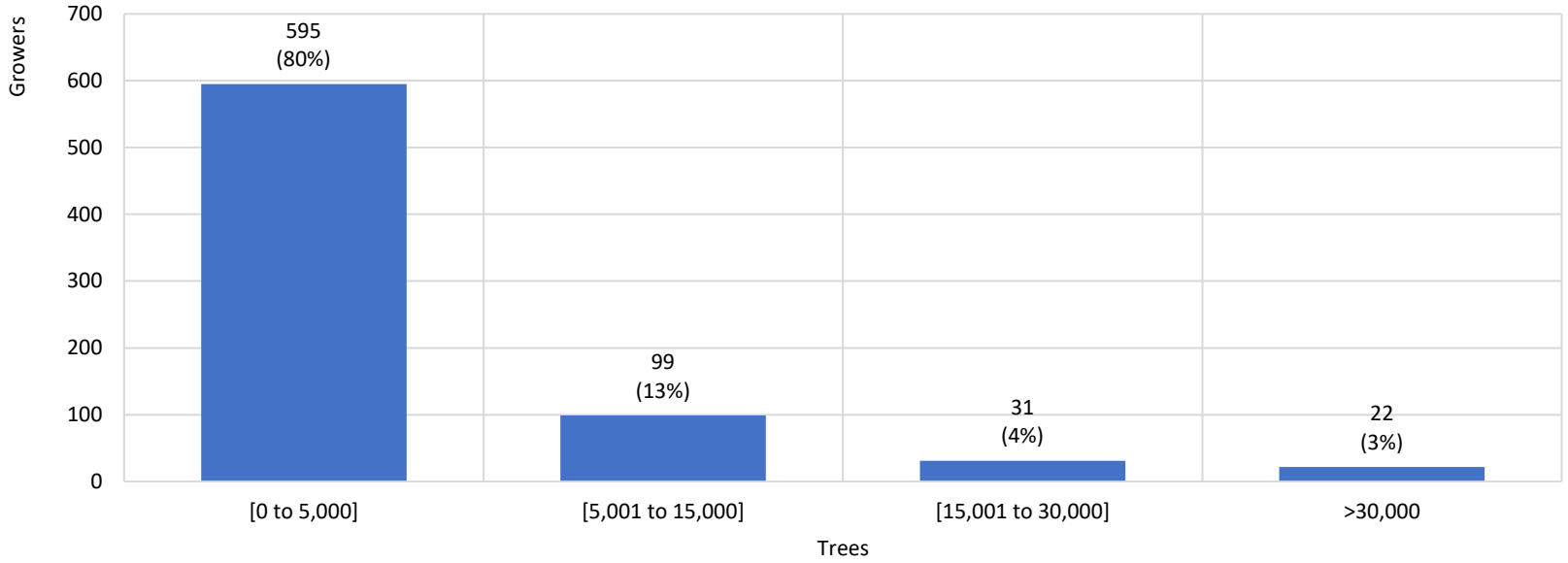


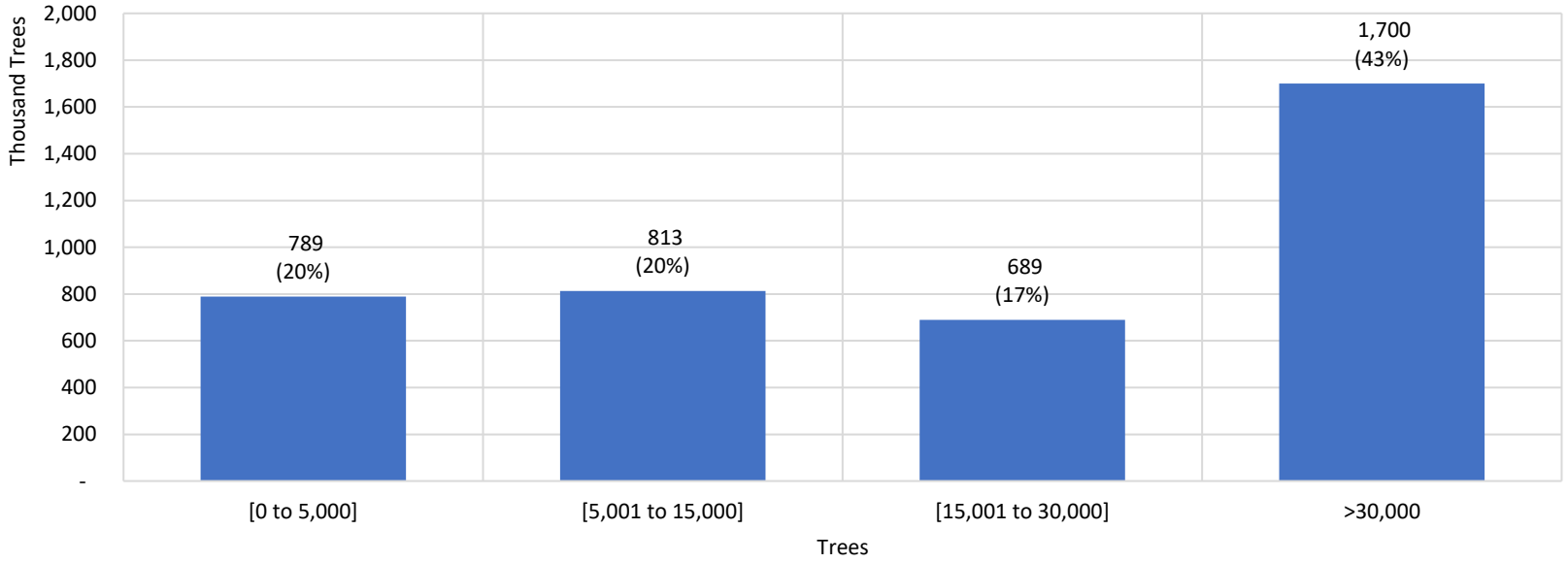
This data shows the size distribution of individual orchards in Australia, by expressing the number of individual orchards that fall within a size category, and how many hectares correspond to orchards that fall within that same size category.

Since we have grouped adjacent orchards managed by the same people, this year's orchard size histogram shows a higher concentration of land among the largest category group.

Of the 815 growers that are known to us 68 we have no records for and are excluded from this dataset. Of the remaining 747, nearly half (47%) are within the 0 to 5 hectare range but account only for 749 hectares (5% of total). Conversely, there is a very small number of comparatively very large growers , that account for the largest proportion of hectares of any single group.

2022 OrchardInfo Report - orchard size profile distribution.





Much like in the previous page, grouping adjacent individual orchards together, this histogram also shows a higher concentration of trees on the largest category group.

The grower size distribution based on number of trees. Shows:

595 (80%) of all growers have 0 to 5,000 trees, accounting for 788,977 of the total trees (20%), averaging 1,326 trees per grower.

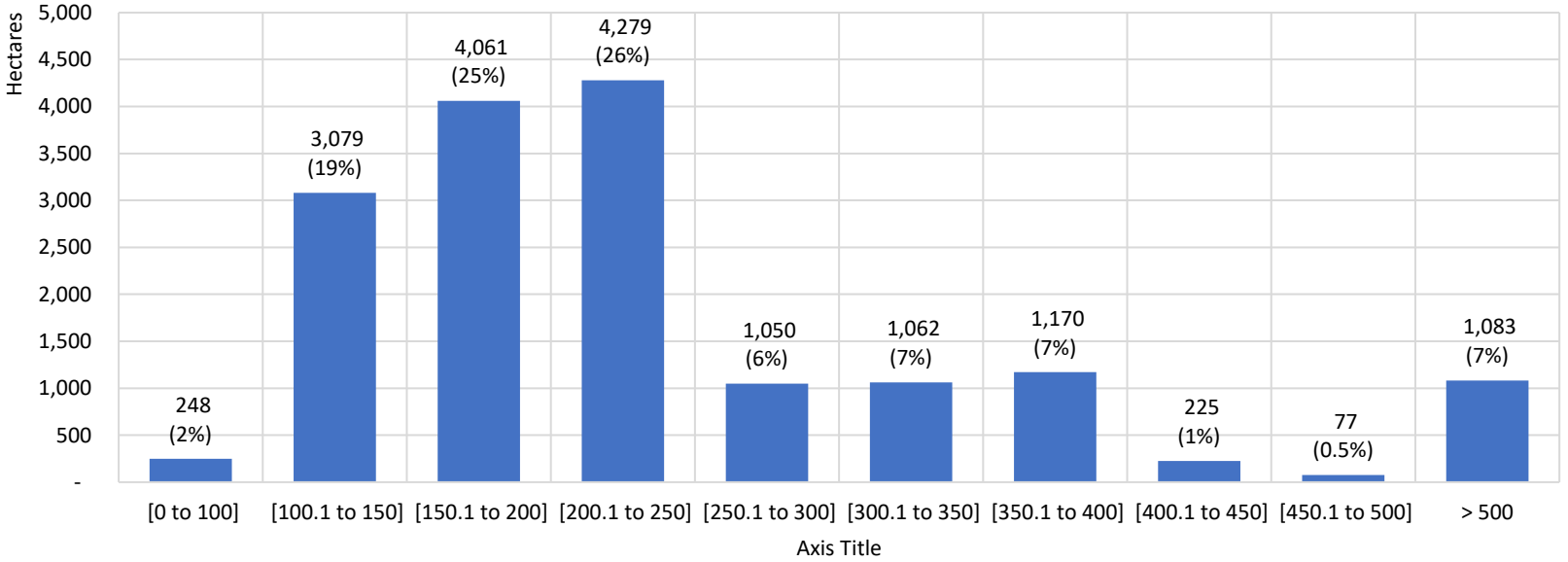
99 growers (13%) accounting for 812,872 trees (20%), averaging 8,211 trees per grower.

31 growers make up 17% of all trees (689,379), averaging 22,238 trees per grower.

Only 22 growers in the category of > 30,000 trees make up 43% of all trees (1,699,821), averaging 77,264.59 trees per grower.

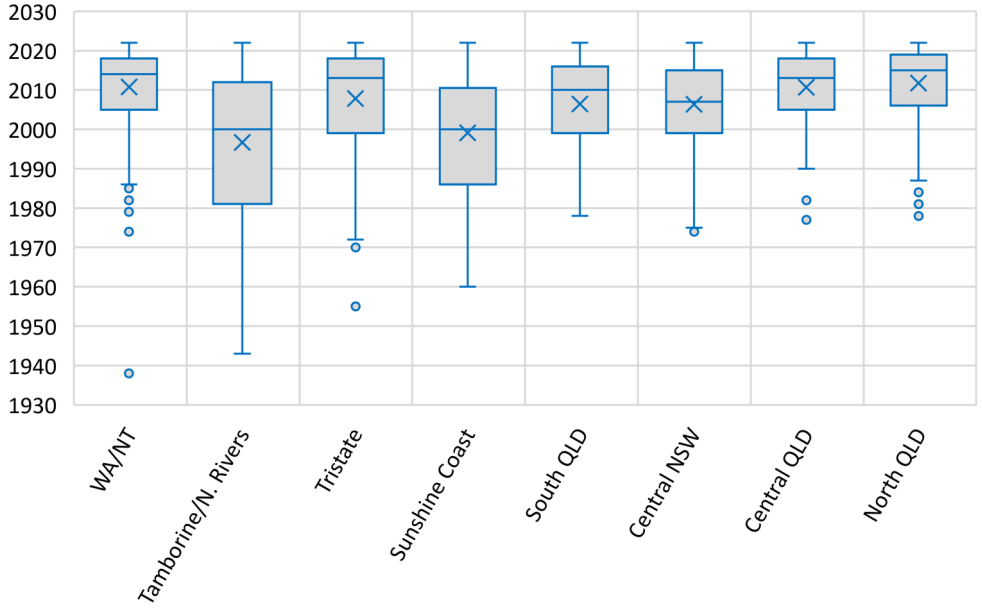
Finally 152 growers (20%) account for 3,202,072 trees, 80% of the total.

2022 OrchardInfo Report - planting density profile distribution.



This chart shows the distribution of planting densities. 11,418 hectares (70% of the total) are planted at densities ranging from 100 to 250 trees per hectare, most of which 4,278 (26% of the total) have a density between 200.1 and 250. The national weighted average density is 244 trees per hectare.

Planting age distribution.



The graph to the left provides a picture of the age distribution of the Australian avocado industry by region through quartiles. 50% of the observed data is between the lower and upper limit of the boxes, and the median is represented by the horizonal line which divides the box between the 2nd and 3rd quartile, and the 'X' represents the mean. The vertical lines extending from the boxes indicate variability outside the upper and lower quartiles. The individual dots represent outliers. From looking at the distributions of the Tamborine / Northern Rivers, and the Sunshine Coast regions, we see that these were where avocados began to be grown in Australia (aside from a couple outliers in Western Australia and Tristate), and that by contrast regions such as Western Australia, North and Central Queensland, by far the largest today, were the newcomers of the industry.

2022 OrchardInfo Report - plantings by variety table.

Variety	Number of trees						Hectares						Trees/hectare		
	0 to 5 yrs	% age group	6 yrs +	% age group	Total	% total	0 to 5 yrs	% age group	6 yrs +	% age group	Total	% total	0 to 5 yrs	6 yrs +	Weighted average
Hass	1,582,994	50%	1,606,202	50%	3,189,196	79.91%	5,134.29	41%	7,301.24	59%	12,435.53	76.13%	308	220	256
Shepard	241,709	49%	246,766	51%	488,475	12.24%	1,418.99	48%	1,539.71	52%	2,958.70	18.11%	170	160	165
Maluma	124,097	85%	21,418	15%	145,515	3.65%	201.59	69%	90.97	31%	292.56	1.79%	616	235	497
Reed	8,026	25%	24,167	75%	32,193	0.81%	27.91	23%	93.62	77%	121.53	0.74%	288	258	265
Carmen	13,676	64%	7,718	36%	21,394	0.54%	59.64	59%	42.21	41%	101.85	0.62%	229	183	210
Lamb	3,420	16%	17,724	84%	21,144	0.53%	9.04	12%	65.34	88%	74.38	0.46%	378	271	284
Wurtz	813	7%	11,616	93%	12,429	0.31%	1.92	3%	57.82	97%	59.74	0.37%	423	201	208
Other*	10,015	57%	7,442	43%	17,457	0.44%	26.91	46%	31.74	54%	58.65	0.36%	372	234	298
Gem	15,981	68%	7,489	32%	23,470	0.59%	25.50	49%	26.52	51%	52.02	0.32%	627	282	451
Fuerte	898	11%	7,409	89%	8,307	0.21%	3.24	7%	42.41	93%	45.65	0.28%	277	175	182
Turner		0%	6,528	100%	6,528	0.16%		0%	37.74	100%	37.74	0.23%	-	173	173
Sharwil	1,464	22%	5,304	78%	6,768	0.17%	4.88	14%	30.15	86%	35.03	0.21%	300	176	193
Edrinol	4,305	91%	439	9%	4,744	0.12%	12.86	83%	2.68	17%	15.54	0.10%	335	164	305
Gwen	635	13%	4,176	87%	4,811	0.12%	1.02	7%	12.88	93%	13.90	0.09%	623	324	346
Pinkerton	679	22%	2,423	78%	3,102	0.08%	1.11	8%	11.98	92%	13.09	0.08%	612	202	237
Zutano	360	14%	2,162	86%	2,522	0.06%	0.53	10%	4.93	90%	5.46	0.03%	679	439	462
Hazzard	635	77%	192	23%	827	0.02%	4.02	81%	0.92	19%	4.94	0.03%	158	209	167
Bacon	159	19%	673	81%	832	0.02%	0.56	18%	2.51	82%	3.07	0.02%	284	268	271
Ryan		0%	612	100%	612	0.02%		0%	2.14	100%	2.14	0.01%	-	286	286
Ettinger	367	74%	127	26%	494	0.01%	0.72	55%	0.58	45%	1.30	0.01%	510	219	380
Rincon		0%	56	100%	56	0.00%		0%	0.39	100%	0.39	0.00%	-	144	144
Llanos		0%	100	100%	100	0.00%		0%	0.37	100%	0.37	0.00%	-	270	270
Santana		0%	49	100%	49	0.00%		0%	0.16	100%	0.16	0.00%	-	306	306
Linda	10	56%	8	44%	18	0.00%	0.04	50%	0.04	50%	0.08	0.00%	250	200	225
Nabal		0%	6	100%	6	0.00%		0%	0.01	100%	0.01	0.00%	-	600	600
Total	**2,010,243**	**50%**	**1,980,806**	**50%**	**3,991,049**	**100%**	**6,934.77**	**42%**	**9,399.06**	**58%**	**16,333.83**	**100%**	**290**	**210**	**244**

**The category 'Other' is comprised of varieties not listed in this table.*

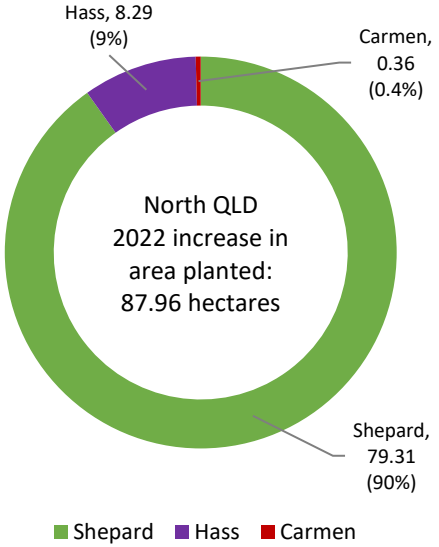
This table summarizes all varieties reported in this census. Hass remains by far the dominant variety with Shepard a distant second, followed by Maluma. Apart from these three largest, no other variety surpasses 1% of the total either by area planted or number of trees, and combined, they only add up to about 4% of trees and of all hectares.

Almost precisely half of all Hass and Shepard trees are up to 5 years of age. Proportionally, younger trees outnumber old ones for other varieties, such as Maluma, Gem, Carmen, and Edrinol.

In terms of density, Hass is close to the total average of 244 trees/hectare. Shepard has one of the lowest densities (165) while Maluma has one of the highest (497).

2022 OrchardInfo Report - North Queensland.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Shepard	190,267	169,359	359,626	40.13%	1,225.34	1,144.05	2,369.39	50.95%	155	148	152
Hass	298,271	132,079	430,350	48.03%	1079	880.88	1,959.88	42.15%	276	150	220
Maluma	72,871	18,685	91,556	10.22%	161.6	77.3	238.90	5.14%	451	242	383
Carmen	6,985	3,581	10,566	1.18%	36.74	21.83	58.57	1.26%	190	164	180
Lamb		1,052	1,052	0.12%		6.31	6.31	0.14%	-	167	167
Other	5	1124	1129	0.13%	0.04	6.25	6.29	0.14%	125	180	179
Turner		680	680	0.08%		4.08	4.08	0.09%	-	167	167
Sharwil	6	420	426	0.05%	0.02	2.62	2.64	0.06%	300	160	161
Gem		435	435	0.05%		2.61	2.61	0.06%	-	167	167
Reed	6	255	261	0.03%	0.02	1.53	1.55	0.03%	-	167	165
Region Total	**568,411**	**327,670**	**896,081**	**100%**	**2,502.76**	**2,147.46**	**4,650.22**	**100%**	**222**	**154**	**190**
Rest of Australia	**1,441,832**	**1,653,136**	**3,094,968**		**4,432.01**	**7,251.60**	**11,683.61**				
Region / Total	**28%**	**17%**	**22%**		**36%**	**23%**	**28%**				



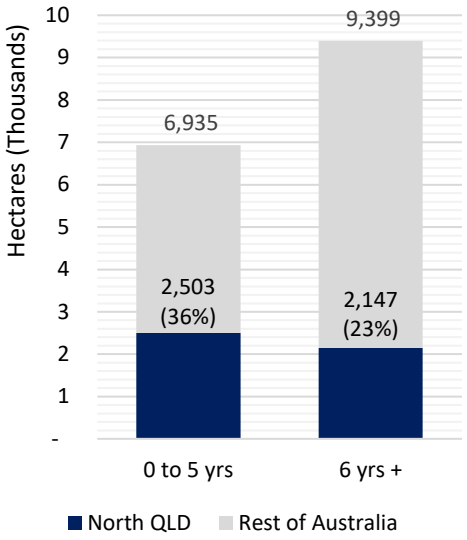
With 4,650 hectares, North Queensland has 28% of Australian total hectares of avocado plantings, making it the largest region in Australia by area.

The number of trees in North Queensland is 896,081 representing 22% of all Australian trees, making it the second largest producing region by number of trees.

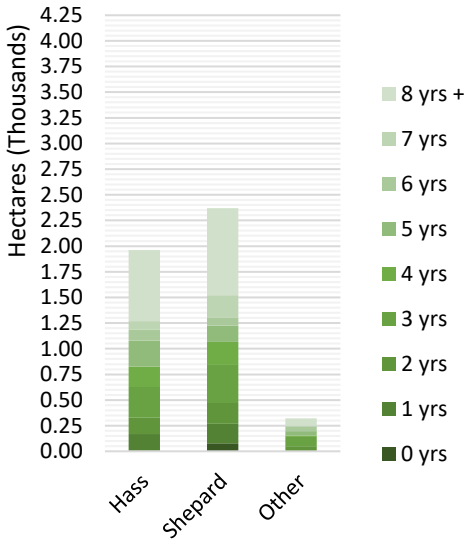
In 2022 North Queensland had a net increase of 13,144 trees across 87.96 hectares, which represents 1.89% of all NQ hectares, and 27.56% of new hectares planted nationally. In total, 53.82% of all NQ hectares were planted in the last five years, compared to the national proportion of 42.46%.

Shepard is the dominant variety in North QLD followed by Hass. Maluma now makes up over 5% of avocado plantings by area in North QLD.

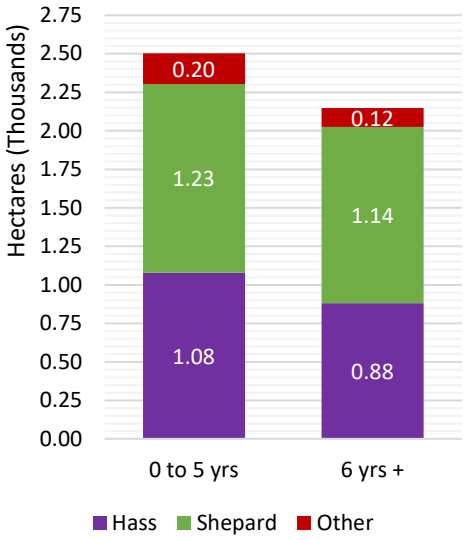
NQ vs Rest of Australia



NQ age groups by variety

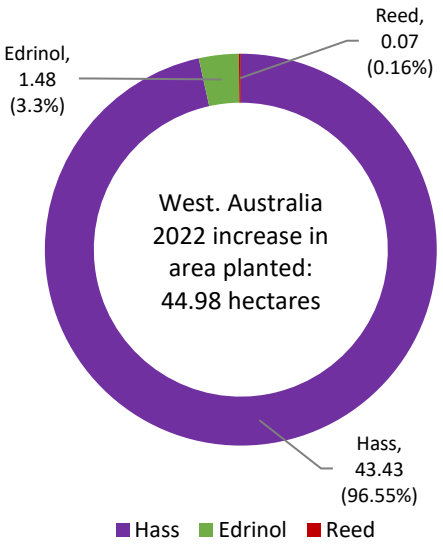


NQ varieties by age group



2022 OrchardInfo Report - Western Australia.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	765,032	621,881	1,386,913	98.72%	1,975.54	2,087.98	4,063.52	98.87%	387	298	341
Lamb	628	2,863	3,491	0.25%	1.01	8.58	9.59	0.23%	622	334	364
Reed	2,740	1,454	4,194	0.30%	5.98	3.19	9.17	0.22%	458	456	457
Zutano	60	2,039	2,099	0.15%	0.21	4.32	4.53	0.11%	286	472	463
Sharwil	1250	130	1,380	0.10%	3.95	0.31	4.26	0.10%	316	419	324
Hazzard	625	7	632	0.04%	4	0.01	4.01	0.10%	156	700	158
Edrinol	1453	145	1598	0.11%	3.5	0.47	3.97	0.10%	-	309	37
Fuerte	400	388	788	0.06%	1.4	1.62	3.02	0.07%	286	240	261
Carmen		600	600	0.04%		2.1	2.10	0.05%	-	286	286
Other	2689	485	3174	0.23%	4.2	1.71	5.91	0.14%	640	284	537
Region Total	**774,877**	**629,992**	**1,404,869**	**100%**	**1,999.79**	**2,110.29**	**4,110.08**	**100%**	**387**	**299**	**342**
Rest of Australia	**1,235,366**	**1,350,814**	**2,586,180**		**4,934.98**	**7,288.77**	**12,223.75**				
Region / Total	**39%**	**32%**	**35%**		**29%**	**22%**	**25%**				



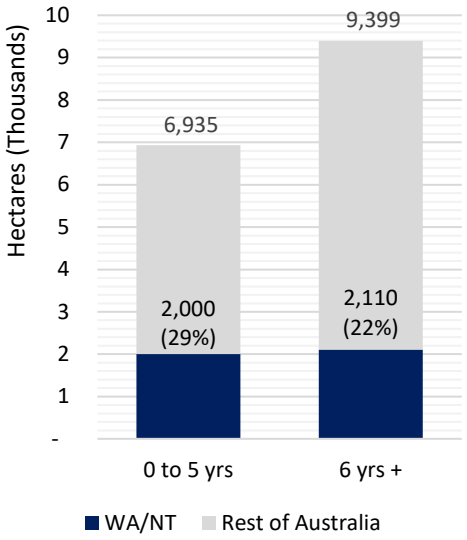
With 4,110 hectares, Western Australia has 25% of Australian total hectares of avocado plantings, making it the second largest region in Australia by area.

The number of trees in Western Australia is 1,404,869 representing 35% of all Australian trees, making it the largest producing region by number of trees after NQ.

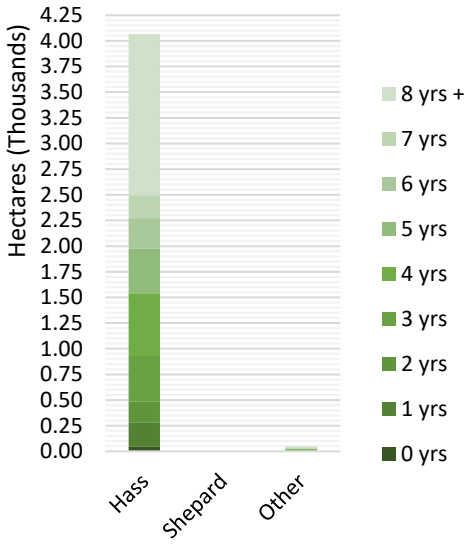
In 2022 Western Australia had a net increase of 14,726 new trees across 44.98 hectares, which represents 1.09% of all WA hectares, and 14.1% of new hectares planted nationally. In total, 48.66% of all WA hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in Western Australia, making up nearly 99% of avocado plantings by area in the region.

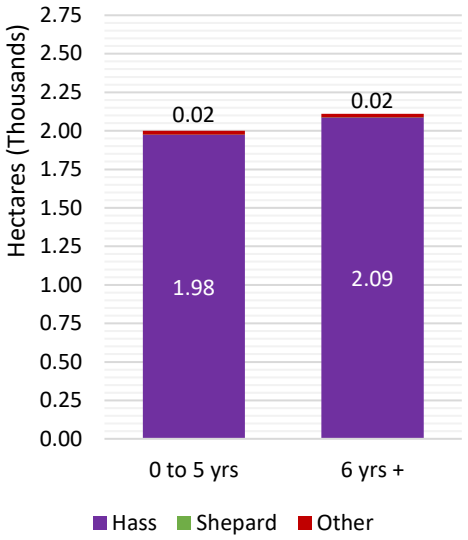
WA vs Rest of Australia



WA age groups by variety

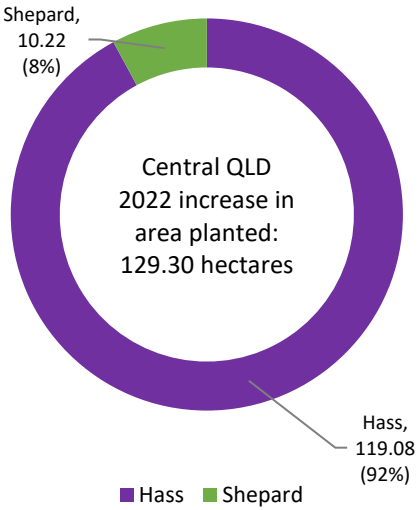


WA varieties by age group



2022 OrchardInfo Report - Central Queensland.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	248,193	310,031	558,224	71.47%	954.68	1,593.16	2,547.84	75.59%	260	195	219
Shepard	49,596	76,626	126,222	16.16%	186.88	392.37	579.25	17.18%	265	195	218
Maluma	40,931	2,733	43,664	5.59%	29.92	13.67	43.59	1.29%	1368	200	1,002
Carmen	6,441	3,087	9,528	1.22%	21.96	15.44	37.40	1.11%	293	200	255
Wurtz	600	7,315	7,915	1.01%	1.44	34.16	35.60	1.06%	417	214	222
Turner		5848	5848	0.75%		33.66	33.66	1.00%	-	174	174
Gem	10302	3850	14152	1.81%	14.34	10.78	25.12	0.75%	718	357	563
Reed	2436	2223	4659	0.60%	11.13	10.86	21.99	0.65%	219	205	212
Lamb		3482	3482	0.45%		11.51	11.51	0.34%	-	303	303
Other	1700	5706	7406	0.95%	1.92	32.93	34.85	1.03%	885	173	213
Region Total	**360,199**	**420,901**	**781,100**	**100%**	**1,222.27**	**2,148.54**	**3,370.81**	**100%**	**283**	**196**	**228**
Rest of Australia	**1,650,044**	**1,559,905**	**3,209,949**		**5,712.50**	**7,250.52**	**12,963.02**				
Region / Total	**18%**	**21%**	**20%**		**18%**	**23%**	**21%**				

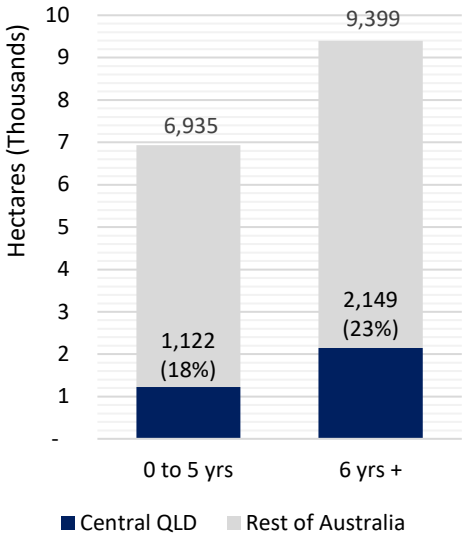


With 3,371 hectares, Central Queensland has 21% of Australian total hectares of avocado plantings. The number of trees in Central Queensland is 781,100 representing 20% of all Australian trees. By both number of trees and hectares, Central QLD is the 3rd largest region.

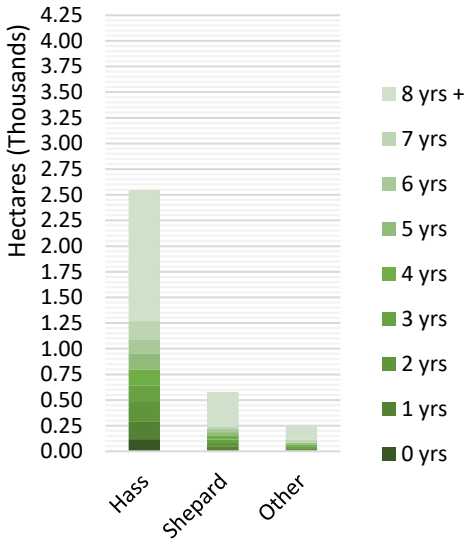
In 2022 Central Queensland had a net increase of 28,084 new trees across 129.30 hectares, which represents 3.84% of all CQ hectares, and 40.52% of new hectares planted nationally. In total, 36.26% of all CQ hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in Central QLD followed by Shepard. Maluma now makes up 1.3% of avocado planted hectares in Central QLD, but 5.59% by number of trees due to its high density.

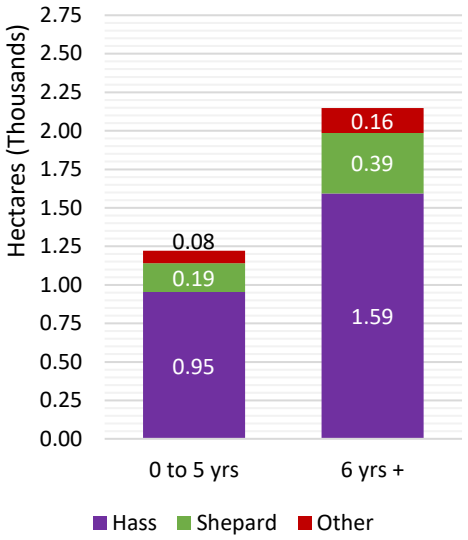
CQ vs Rest of Australia



CQ age groups by variety

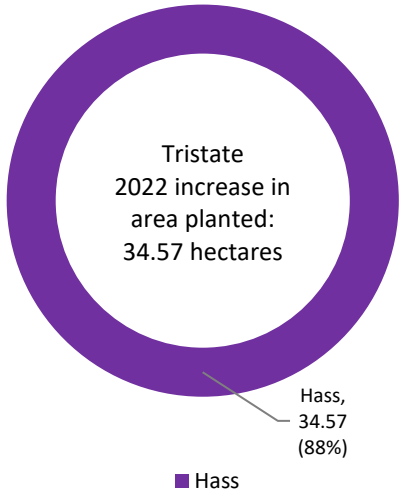


CQ varieties by age group



2022 OrchardInfo Report - Tristate.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	123,152	158,018	281,170	85.05%	419.8	674.22	1,094.02	86.77%	293	234	257
Reed	1,627	8,488	10,115	3.06%	6.62	30.33	36.95	2.93%	246	280	274
Other	7,984	4,208	12,192	3.69%	25.16	15	40.16	3.19%	317	281	304
Lamb	2,223	6,865	9,088	2.75%	6.14	19.3	25.44	2.02%	362	356	357
Gem	4555	2,314	6,869	2.08%	8.63	10.51	19.14	1.52%	528	220	359
Fuerte	66	2864	2930	0.89%	0.17	15.01	15.18	1.20%	388	191	193
Gwen	10	4019	4029	1.22%	0.02	12.17	12.19	0.97%	500	330	331
Edrinol	2323	160	2483	0.75%	7.46	0.74	8.20	0.65%	311	216	303
Wurtz	60	1120	1180	0.36%	0.25	7.39	7.64	0.61%	240	152	154
Bacon	149	387	536	0.16%	0.54	1.38	1.92	0.15%	276	280	279
Region Total	**142,149**	**188,443**	**330,592**	**100%**	**474.79**	**786.05**	**1,260.84**	**100%**	**301**	**239**	**262**
Rest of Australia	**1,868,094**	**1,792,363**	**3,660,457**		**6,459.98**	**8,613.01**	**15,072.99**				
Region / Total	**7%**	**10%**	**8%**		**7%**	**8%**	**8%**				

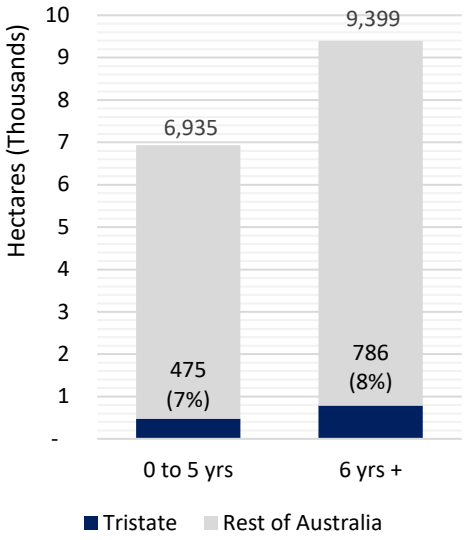


With 1,261 hectares, Tristate has 8% of Australian total hectares of avocado plantings. The number of trees in Tristate is 330,592 representing as well an 8% of all Australian trees.

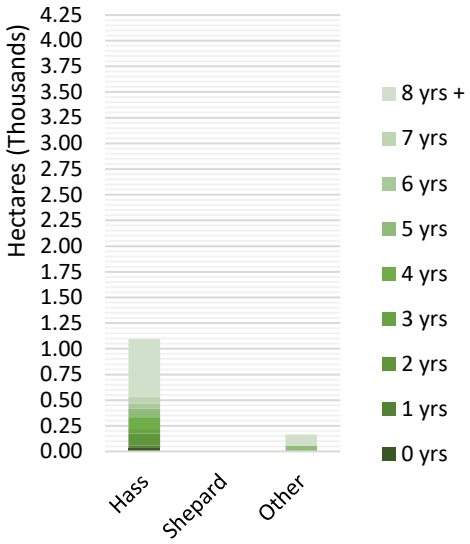
In 2022 Tristate had a net increase of 7,108 new trees across 34.57 hectares, which represents 2.74% of all Tristate hectares, and 10.83% of new hectares planted nationally. In total, 37.66% of all Tristate hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in Tristate making up 86.77% of avocado plantings by area in the region followed by Reed, making up 2.93% of plantings.

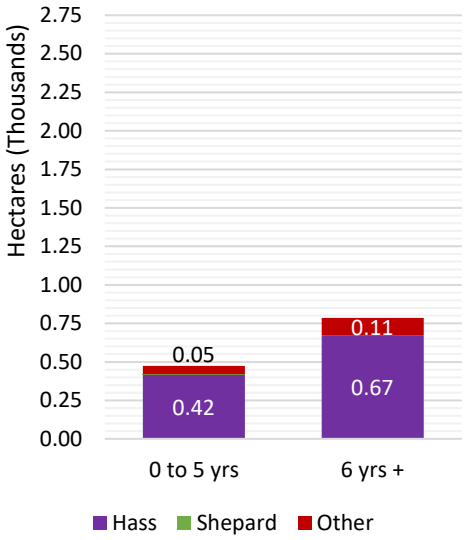
TRI vs Rest of Australia



TRI age groups by variety

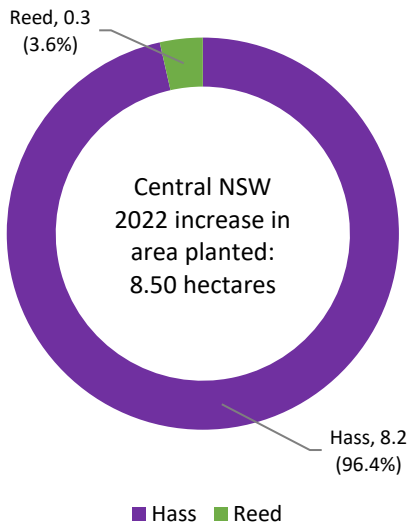


TRI varieties by age group



2022 OrchardInfo Report - Central New South Wales.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	57,531	168,082	225,613	92.42%	269.12	872.75	1,141.87	96.43%	214	193	198
Reed	118	6,462	6,580	2.70%	0.37	19.08	19.45	1.64%	319	339	338
Maluma	8,740		8,740	3.58%	8.03		8.03	0.68%	1088	-	1,088
Fuerte	2	874	876	0.36%	0.01	5.23	5.24	0.44%	200	167	167
Lamb	100	990	1,090	0.45%	0.75	3.52	4.27	0.36%	133	281	255
Sharwil	6	564	570	0.23%	0.04	3.16	3.20	0.27%	150	-	2
Carmen	113		113	0.05%	0.68		0.68	0.06%	166	-	166
Other	16	193	209	0.09%	0.04	0.77	0.81	0.07%	400	251	258
Shepard		89	89	0.04%		0.32	0.32	0.03%	-	278	278
Gem	230		230	0.09%	0.28		0.28	0.02%	821	-	821
Region Total	**66,856**	**177,254**	**244,110**	**100%**	**279.32**	**904.83**	**1,184.15**	**100%**	**221**	**193**	**200**
Rest of Australia	**1,943,387**	**1,803,552**	**3,746,939**		**6,655.45**	**8,494.23**	**15,149.68**				
Region / Total	**3%**	**9%**	**6%**		**4%**	**10%**	**7%**				

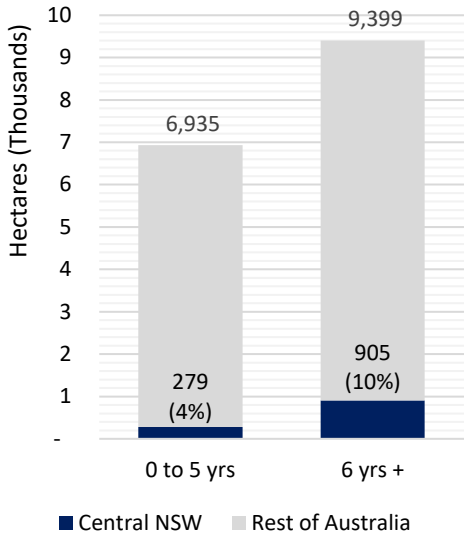


With 1,184 hectares, CNSW has 7% of Australian total hectares of avocado plantings. The number of trees in CNSW is 244,110 representing 6% of all Australian trees.

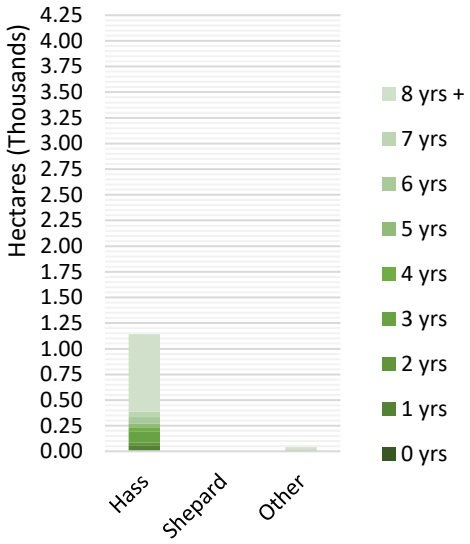
In 2022 CNSW growers had a net increase of 1,048 new trees across 8.5 hectares, which represents 0.72% of all of the region's hectares, and 2.66% of new hectares planted nationally. In total, 23.59% of all CNSW hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in CNSW making up 96.43% of avocado plantings by area in the region, followed by Reed, making up 1.64% of plantings.

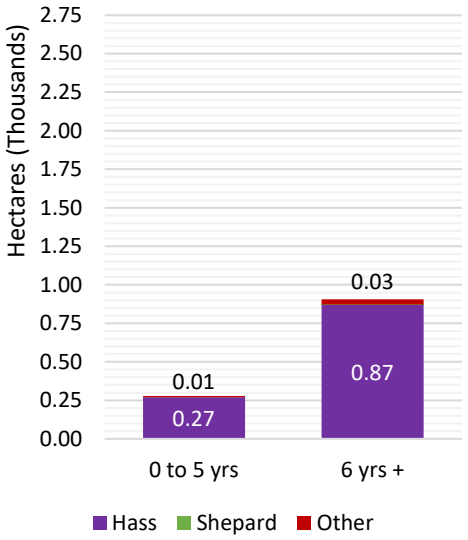
CNSW vs Rest of Australia



CNSW age groups by variety

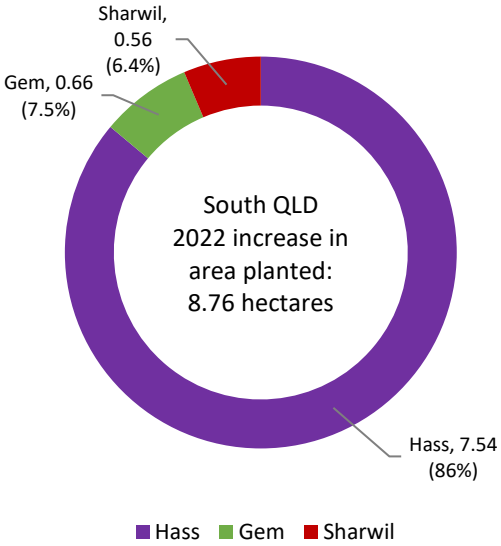


CNSW varieties by age group



2022 OrchardInfo Report - South Queensland.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	53,899	124,443	178,342	94.59%	262.91	726.21	989.12	94.28%	205	171	180
Reed	553	3,367	3,920	2.08%	1.22	20.58	21.80	2.08%	453	164	180
Lamb	125	1,561	1,686	0.89%	0.52	10.71	11.23	1.07%	240	146	150
Sharwil	192	724	916	0.49%	0.85	5.88	6.73	0.64%	226	123	136
Wurtz		483	483	0.26%		4.6	4.60	0.44%	-	105	105
Fuerte	80	471	551	0.29%	0.4	4.13	4.53	0.43%	-	114	104
Shepard	646	16	662	0.35%	3.6	0.09	3.69	0.35%	179	178	179
Carmen	100	450	550	0.29%	0.16	2.84	3.00	0.29%	625	158	183
Edrinol	49	82	131	0.07%	0.24	0.98	1.22	0.12%	204	84	107
Other	964	345	1309	0.69%	1.3	1.89	3.19	0.30%	-	183	108
Region Total	**56,608**	**131,942**	**188,550**	**100%**	**271.20**	**777.91**	**1,049.11**	**100%**	**209**	**170**	**180**
Rest of Australia	**1,953,635**	**1,848,864**	**3,802,499**		**6,663.57**	**8,621.15**	**15,284.72**				
Region / Total	**3%**	**7%**	**5%**		**4%**	**8%**	**6%**				

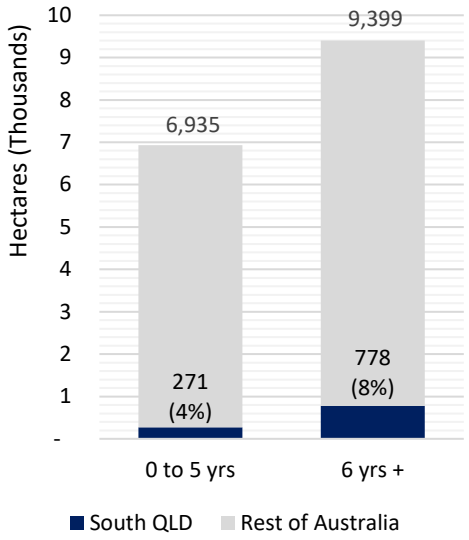


With 1,049 hectares, South Queensland has 6% of Australian total hectares of avocado plantings. The number of trees in SQ is 188,550 representing 5% of all Australian trees.

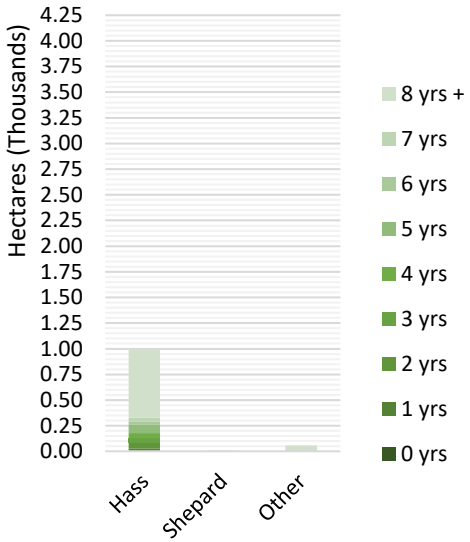
In 2022 SQ had a net increase of 2,525 new trees across 8.76 hectares, which represents 0.83% of all of the region's hectares, and 2.75% of new hectares planted nationally. In total, 25.85% of all SQ hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in SQ making up 94.28% of avocado plantings by area in the region.

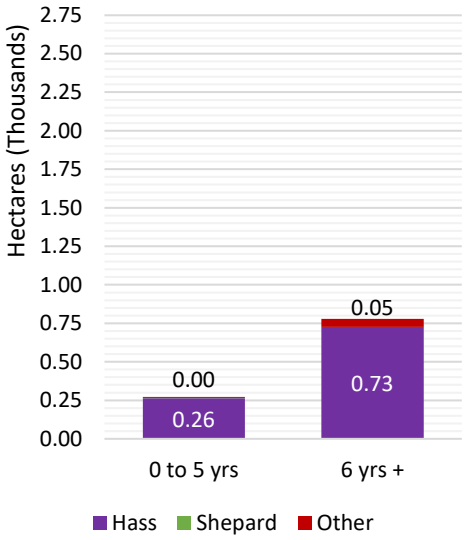
SQ vs Rest of Australia



SQ age groups by variety

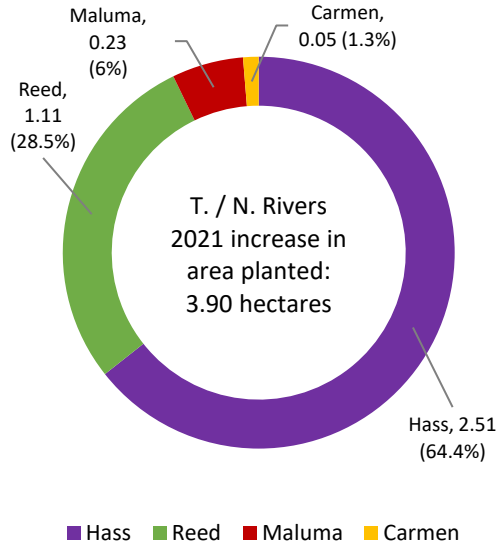


SQ varieties by age group



2022 OrchardInfo Report - Tamborine / Northern Rivers.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	26,327	51,376	77,703	89.22%	141.49	254.46	395.95	91.16%	186	202	196
Fuerte	350	1,356	1,706	1.96%	1.26	7.73	8.99	2.07%	278	175	190
Reed	546	1,523	2,069	2.38%	2.57	6.29	8.86	2.04%	212	242	234
Other	1,057	1,231	2,288	2.63%	1.62	5.24	6.86	1.58%	652	235	334
Lamb	344	476	820	0.94%	0.62	3.22	3.84	0.88%	555	148	214
Wurtz		539	539	0.62%		3.17	3.17	0.73%	-	170	170
Sharwil		557	557	0.64%		2.67	2.67	0.61%	-	209	209
Shepard	680	157	837	0.96%	1.42	1.05	2.47	0.57%	479	150	339
Pinkerton		184	184	0.21%		0.91	0.91	0.21%	-	202	202
Maluma	385		385	0.44%	0.61		0.61	0.14%	631	-	631
Region Total	**29,689**	**57,399**	**87,088**	**100%**	**149.59**	**284.74**	**434.33**	**100%**	**199**	**201**	**200**
Rest of Australia	**1,980,554**	**1,923,407**	**3,903,961**		**6,785.18**	**9,114.32**	**15,899.50**				
Region / Total	**1%**	**3%**	**2%**		**2%**	**3%**	**3%**				

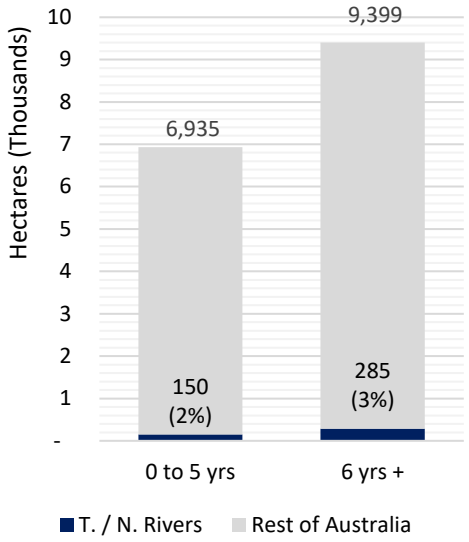


With 434 hectares, Tamborine / Northern Rivers has 3% of Australian total hectares of avocado plantings. The number of trees in TNR is 87,088 representing 2% of all Australian trees.

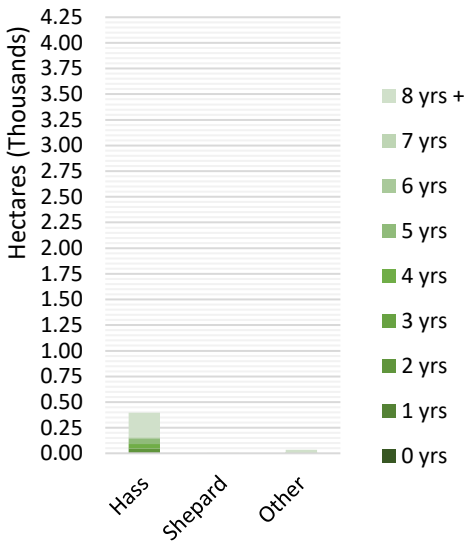
In 2022 TNR had a net increase of 1,330 new trees across 3.90 hectares, which represents 0.9% of all of the region's hectares, and 1.22% of new hectares planted nationally. In total, 34.44% of all TNR hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in TNR making up 91.16% of avocado plantings by area in the region.

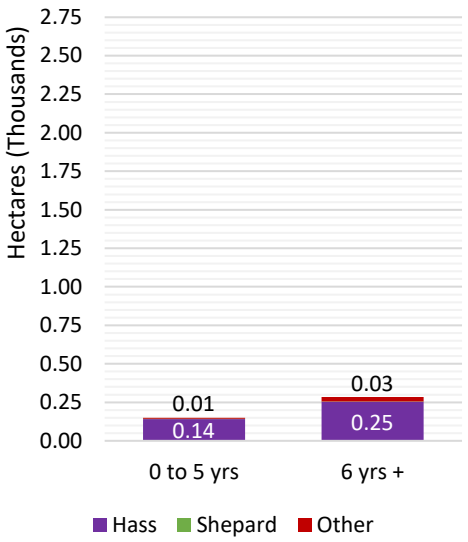
TNR vs Rest of Australia



TNR age groups by variety

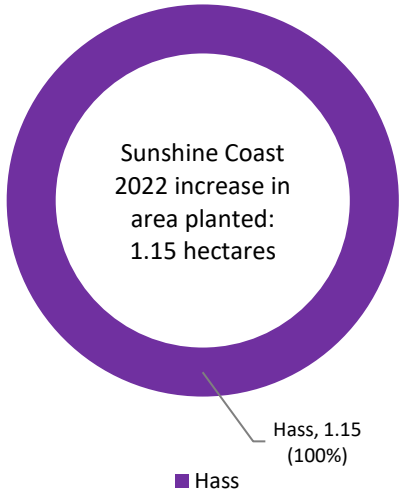


TNR varieties by age group



2022 OrchardInfo Report - Sunshine Coast.

Variety	Number of trees				Hectares				Trees/hectare		
	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Total	%	0 to 5 yrs	6 yrs +	Weighted average
Hass	10,589	40,292	50,881	86.74%	31.75	211.58	243.33	88.71%	334	190	209
Wurtz		2,116	2,116	3.61%		8.26	8.26	3.01%	-	256	256
Pinkerton		1,265	1,265	2.16%		4.92	4.92	1.79%	-	257	257
Gem	530	860	1,390	2.37%	1.59	2.58	4.17	1.52%	-	333	206
Sharwil		656	656	1.12%		3.64	3.64	1.33%	-	180	180
Lamb		435	435	0.74%		2.19	2.19	0.80%	-	199	199
Shepard	120	517	637	1.09%	0.29	1.82	2.11	0.77%	414	284	302
Fuerte		515	515	0.88%		1.82	1.82	0.66%	-	283	283
Reed		395	395	0.67%		1.76	1.76	0.64%	-	-	-
Other	215	154	369	0.63%	1.42	0.67	2.09	0.76%	151	230	177
Region Total	**11,454**	**47,205**	**58,659**	**100%**	**35.05**	**239.24**	**274.29**	**100%**	**300**	**196**	**209**
Rest of Australia	**1,998,789**	**1,933,601**	**3,932,390**		**6,899.72**	**9,159.82**	**16,059.54**				
Region / Total	**1%**	**2%**	**1%**		**1%**	**3%**	**2%**				

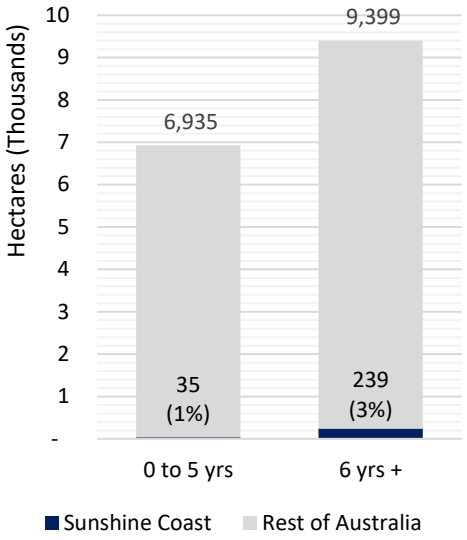


With 274 hectares, Sunshine Coast has 2% of Australian total hectares of avocado plantings. The number of trees in SC is 58,659 representing 1% of all Australian trees.

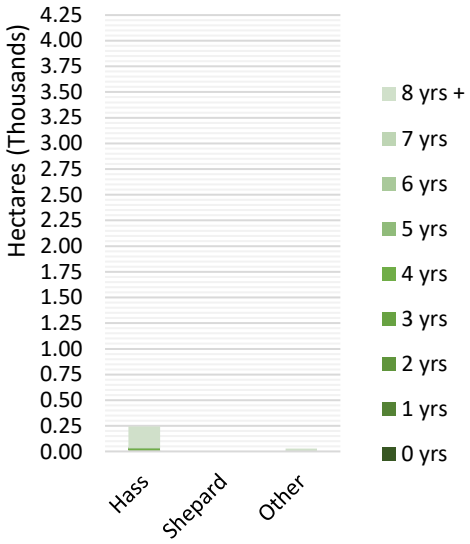
In 2022 SC had a net increase of 385 new trees across 1.15 hectares, which represents 0.42% of all of the region's hectares, and 0.36% of new hectares planted nationally. In total, 12.78% of all SC hectares were planted in the last five years, compared to the national proportion of 42.46%.

Hass is the dominant variety in SC making up 88.71% of avocado plantings by area in the region.

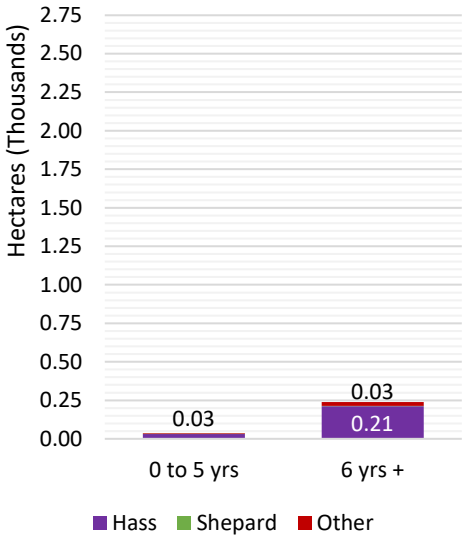
SC vs Rest of Australia



SC age groups by variety



SC varieties by age group



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Weekly Infocado Report - week 37 of 2023 (09 - 15 September 2023)

Forecast for this week:	Dispatch for this week:	Next week's forecast:	Dispatch this week last year:	Average retail price:
380,819 tray eqv.	**345,168** tray eqv.	**438,281** tray eqv.	**358,664** tray eqv.	**$ 1.18** / piece
	-9.36% relative to forecast for this week	+26.98% relative to dispatch for this week	+3.91% relative to dispatch for this week	-7.81% relative to last week
				more detail here

Week 37 - 2023 Comments:

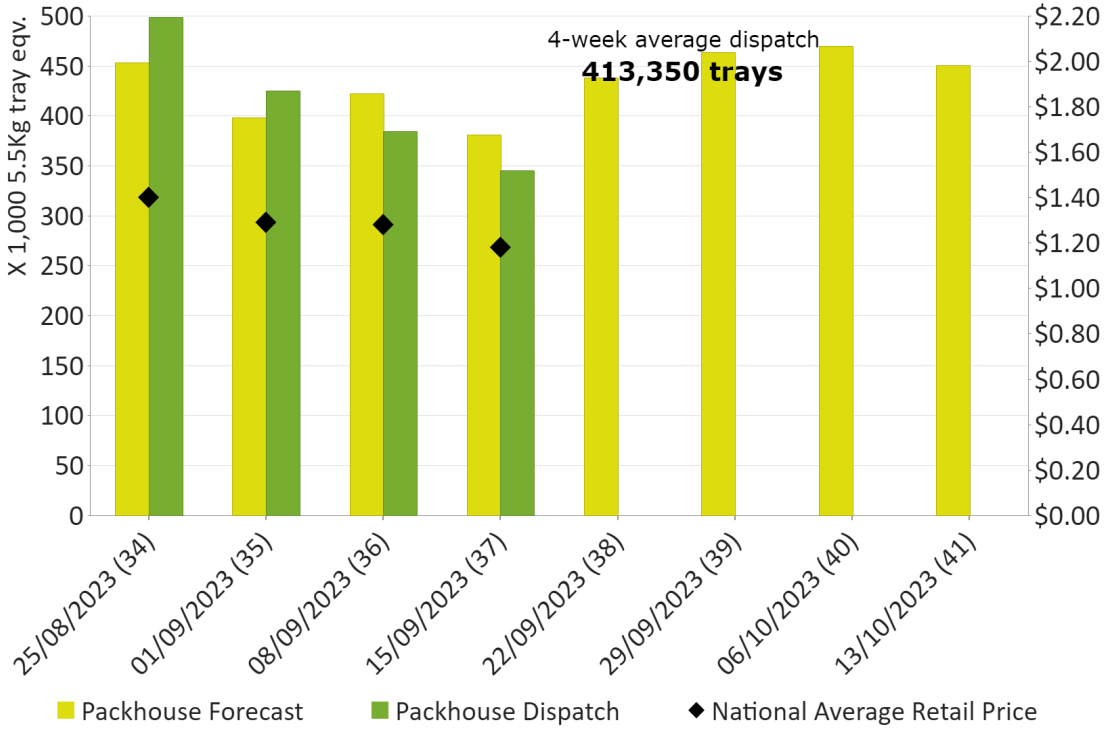
Are you staying up to date on current market conditions? More importantly, are you listening to the feedback from your agent on sizing and quality? Don't be caught out with unsaleable fruit, ask for feedback and take action to ensure your fruit is meeting the market demand.

Total recorded dispatch for week 37 was 345,168 tray equivalents, a –10.18% decrease on the previous week (384,308 tray eqv.) and 9.36% lower than the forecasted 380,819 tray eqv. Western Australia supplied the majority of the fruit at 43.52%, followed by Tristate with 30.85%, South Qld with 11.98%, Central NSW with 10.37%, Tamborine / N.Rivers, New Zealand, and the Sunshine Coast supplied the remaining 3.28%.

If you are finishing your season, please remember to tick the 'final dispatch / forecast for the season' box on the dispatch and forecast forms.

Using and interpreting Infocado

Figure 1. Dispatch vs forecast (weeks 34 to 41 - 25/08/2023 - 13/10/2023)



Marketing Update: Australian Avocados - nutrient boosters!

We all know Avocado is well known for its healthy fats, but there is so much more nutrition packed inside every avocado. The Australian Avocados website provides this information to both consumers and health professionals. The nutrition hub on the website keeps health professionals up-to-date with all the latest health research and handy resources including meal plans, literature reviews and dietary advice. https://australianavocados.com.au/health-professional/

Latest avocado marketing news

Upcoming Public Holidays:
Monday 25th September: King's Birthday (WA)
Monday 2nd October: King's Birthday (QLD) & Labour Day (ACT, NSW & SA)

Report Index:
Cover: Weekly summary; Dispatch vs forecast
Page 2: Marketing brief; Upcoming public holidays; Index of contributors
Page 3: Dispatch data by variety and pack type; 4-weekly forecast data; Dispatch data by origin, fruit size, and pack type; Dispatch vs forecast; Dispatch vs weekly forecast by region
Page 4: Seasonal progress chart; Estimated total supply
Page 5: Packers dispatch by region of origin; New Zealand and Chile avocado exports
Page 6: Packers dispatch by variety; Packers dispatch by trade channel

Reports Notes:
The Weekly Infocado report is compiled using data contributed by avocado packhouses and traders through the AvoData system. Please note that Quarterly Infocado reports incorporate additional data (by region) which is not contributed directly into the system. Therefore it is not possible to extrapolate the figures from Weekly Infocado reports to those in Quarterly Infocado reports. Initially, this report is provided to contributors only, then publicly released six weeks later. Until public release, the report is confidential. This report has been 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.

Week 37 - 2023 Contributors - Packhouses

NZ Avocado Ltd (NZ)	T W Silver (TNR)	Avowest (WA/NT)
B & M Trousdell Enterprises (SQ)	60 Foot Orchards Pty Ltd (Tristate)	Bendotti Avocado (WA/NT)
Balmoral Orchard (SQ)	Barham Avocados (Tristate)	Delroy Orchards (WA/NT)
Cherry Creek Orchards Pty Ltd (SQ)	Churinga Orchards (Tristate)	Licciardello & Son Orchards (WA/NT)
Minmore Fruits (SQ)	Cutri Fruit (Tristate)	Newton Orchards (WA/NT)
Natures Fruit Company (SQ)	Golden Hill Packing Pty Ltd (Tristate)	R & S Bamess (WA/NT)
Sunnyspot Packhouse Pty Ltd (SQ)	Goldup Farms (Tristate)	The Avocado Collective (WA/NT)
Touchwood Farming (SQ)	J.G. Loffler (Tristate)	The Avocado Grove (WA/NT)
Wodonga Park Fruit and Nuts (SQ)	Marrbiz Pty Ltd (Tristate)	CNSW: Less than 3 packhouse contributors
Aussie Orchards Growers & Packers (TNR)	Parkes Lane Produce (Tristate)	SC: Less than 3 packhouse contributors
Jirel Holdings (TNR)	Vitor Marketing Pty Ltd (Tristate)	
Summerland Farm (TNR)	Avonova (WA/NT)	

Week 37 - 2023 Contributors - Traders

Sinclair & Antico Pty Ltd [Sydney]	Watt Export (National)
Costa Avocado (National)	Green Skin Avocados (National)
Costa Farms [Adelaide]	WA Farm Direct [Perth]
Fresh Choice WA Pty Ltd [Perth]	Natures Fruit Company (National)
N & A Fruit Distributors Pty Ltd [Sydney]	LaManna Premier Group [Adelaide]
Costa Farms [Melbourne]	LaManna Premier Group [Melbourne]
Murray Bros [Brisbane]	LaManna Premier Group [Sydney]
J.H.Leavy & Co [Brisbane]	Rock Ridge Fresh (National)

Figure 2. Dispatch data by variety and pack type - Week Ending 15/09/2023 (37)

Variety	5.5 Kg Trays units	10 Kg Bulks units	Pre-packed Kg	Processing Kg	Other Kg	5.5Kg Tray Eqv
Hass	265,863	39,193	6,358	26,276	2,642	343,540
Shepard	-	-	-	-	-	-
Other	877	281	-	1,318	-	1,628
Total	**266,740**	**39,474**	**6,358**	**27,594**	**2,642**	**345,168**

Figure 3. 4-weekly forecast data in 5.5 Kg tray eqv (date: week ending)

Variety	15/09/2023 (37)	22/09/2023 (38)	29/09/2023 (39)	06/10/2023 (40)	13/10/2023 (41)
Hass	380,819	438,281	463,845	469,542	450,617
Shepard	-	-	-	-	-
Other	-	-	-	-	-
Week Total	**380,819**	**438,281**	**463,845**	**469,542**	**450,617**

Figure 4. Dispatch Data By Origin, Fruit Size and Pack Type - Week Ending 15/09/2023 (37)

	5.5Kg trays (counts)									Total 5.5Kg Trays	Bulk 10kg cartons	Pre-packed Kg	Proc Kg	Other Kg	Total 5.5Kg Tray Eqv	%
	<16	16	18	20	22	23	25	28	>28							
NQ	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00 %
CQ	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00 %
SC	-	6	11	34	-	13	17	-	-	81	41	-	-	-	156	0.05 %
SQ	91	711	2,741	6,044	-	6,836	6,052	4,981	1,513	28,969	6,540	-	-	2,642	41,341	11.98 %
TNR	-	35	299	674	-	2,057	1,597	1,334	132	6,128	389	4,398	-	-	7,635	2.21 %
CNSW	101	375	1,531	5,911	-	5,042	7,020	3,234	480	23,694	4,890	1,960	15,751	-	35,805	10.37 %
Tristate	-	2,231	6,070	15,670	-	23,164	21,769	10,128	5,915	84,947	10,659	-	11,843	-	106,481	30.85 %
WA/NT	34	506	5,742	18,725	-	32,245	29,050	24,750	8,348	119,400	16,955	-	-	-	150,229	43.52 %
NZ	-	141	282	598	-	950	669	458	423	3,521	-	-	-	-	3,521	1.02 %
Grand Total	**226**	**4,005**	**16,676**	**47,656**	**0**	**70,307**	**66,174**	**44,885**	**16,811**	**266,740**	**39,474**	**6,358**	**27,594**	**2,642**	**345,168**	**100 %**

Figure 5. Dispatch vs forecast - 31/03/2023 - 13/10/2023 (weeks 13 to 41)

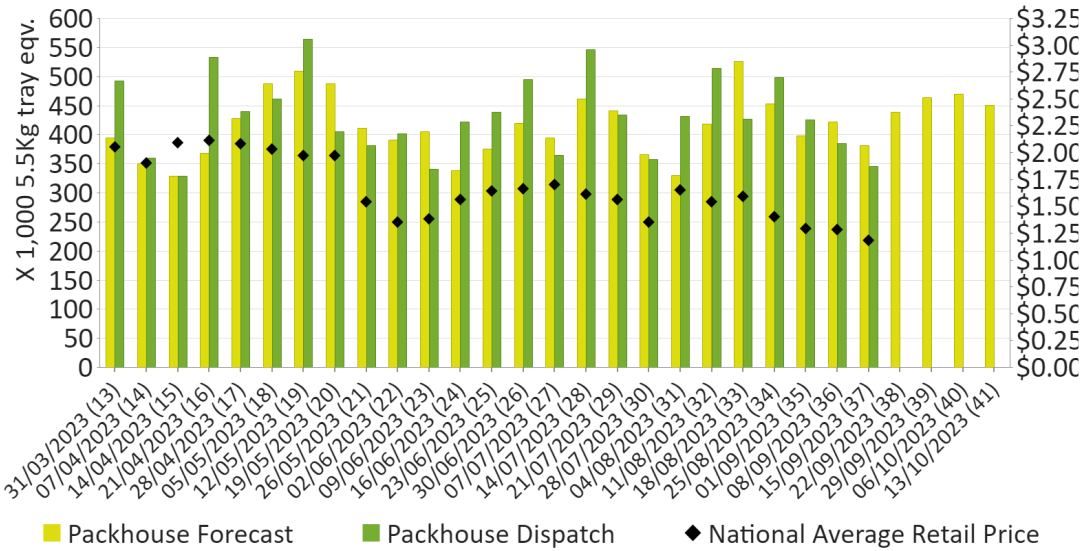


Figure 6. Dispatch vs weekly forecast by region - Week Ending 15/09/2023 (37)

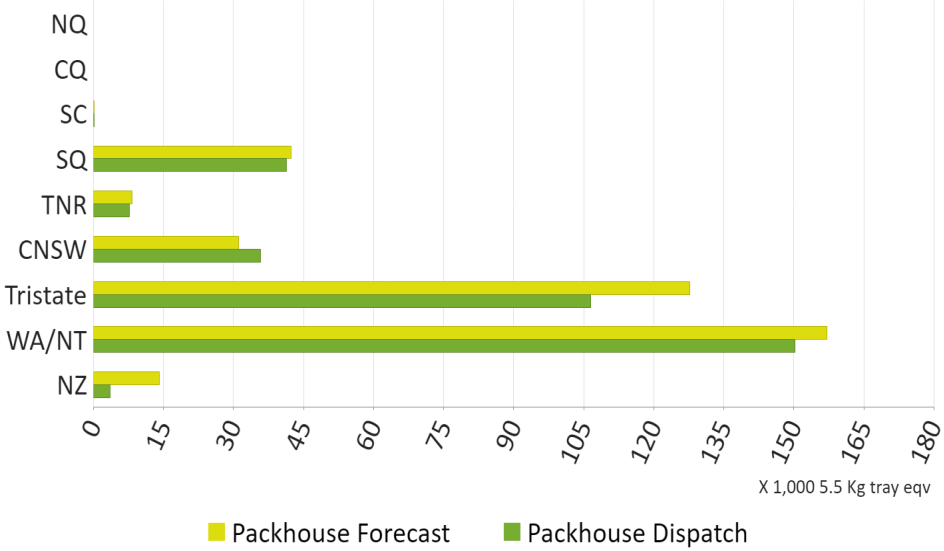
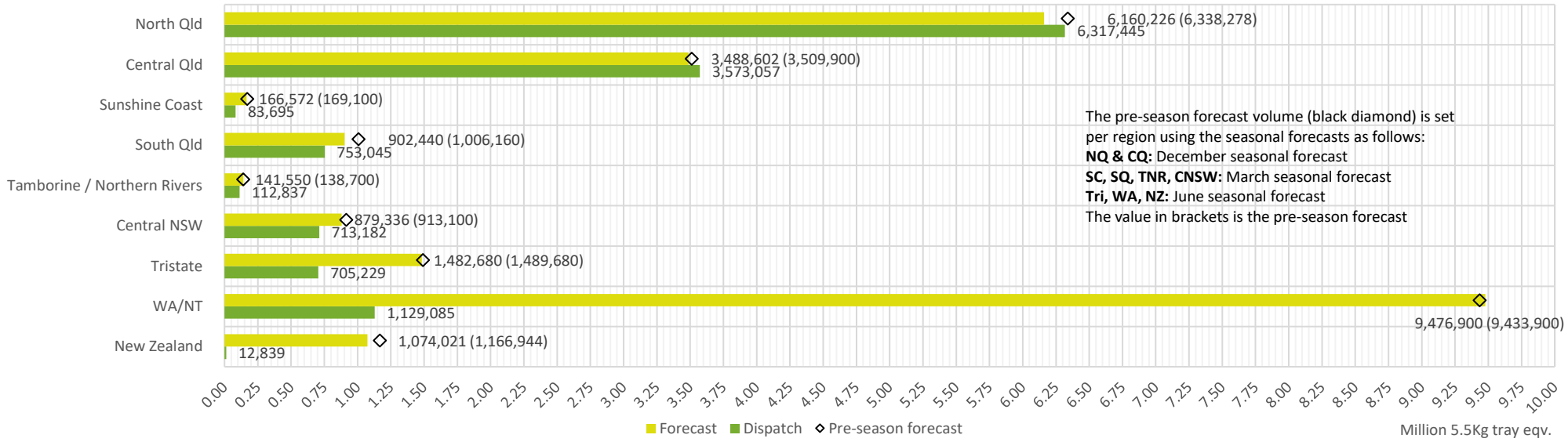


Figure 7. 2023-24 Season Progress (Million 5.5Kg trays) - Week Ending 15/09/2023 (37)

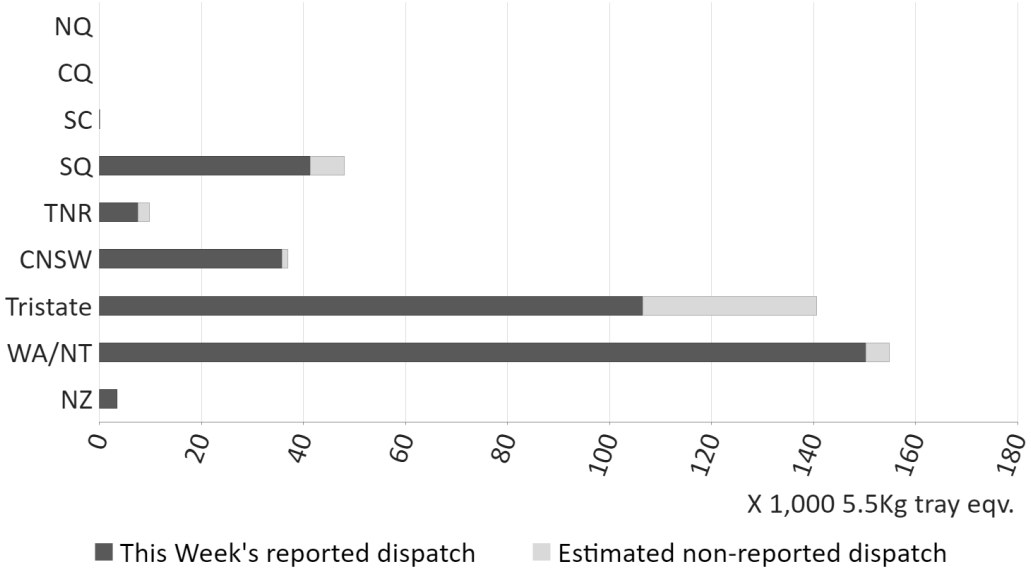


The **season progress graph** above uses seasonal forecast data from direct contributors, it does not include data from non-contributing packhouses. Therefore these figures may be lower than those shown on the Quarterly Infocado Report.

Figure 8. Estimated total supply - Week Ending 15/09/2023 (37)

Region	Percent of Estimated Total Supply *	This Week's Reported Dispatch	Estimated Non-reported Dispatch	Estimated Total Supply
	%	5.5 Kg tray eqv	5.5 Kg tray eqv	5.5 Kg tray eqv
North QLD	-	-	-	-
Central QLD	-	-	-	-
Sunshine Coast	79 %	156	33	189
South QLD	84 %	41,341	6,615	47,956
Tamborine/Northern Rivers	71 %	7,635	2,214	9,849
Central NSW	97 %	35,805	1,074	36,879
Tristate	68 %	106,481	34,074	140,555
WA/NT	97 %	150,229	4,507	154,736
New Zealand	100 %	3,521	-	3,521
Grand Total		**345,168**	**48,516**	**393,684**

Figure 9. Estimated total supply - Week Ending 15/09/2023 (37)



All data in this report is provided by direct contributors only. The table and chart above provides an estimate of the total volume dispatch this week including data extrapolated from the Quarterly Infocado Report.

Figure 10. Packers dispatch by region of origin - 31/03/2023 - 15/09/2023 (weeks 13 to 37)

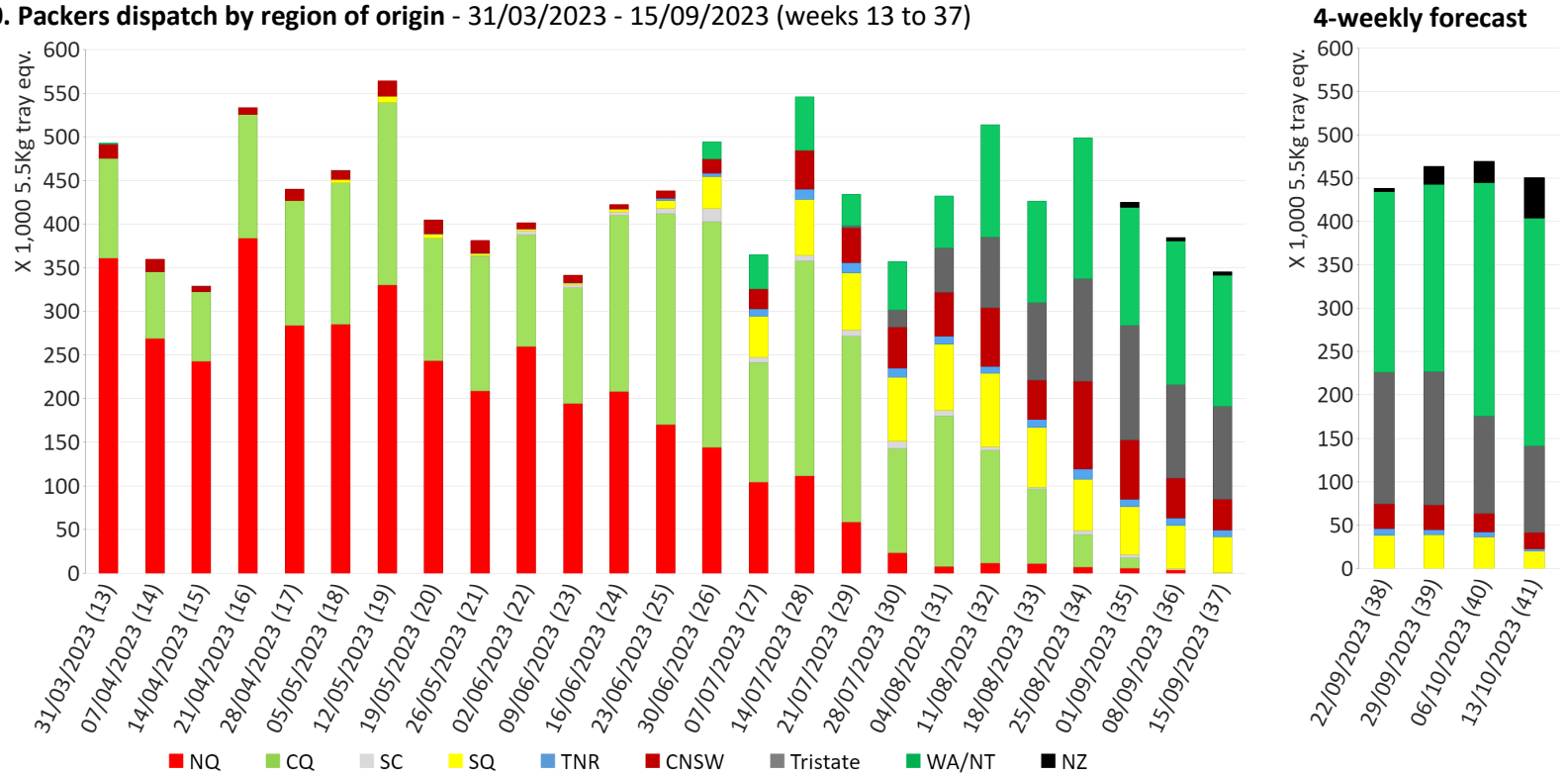


Figure 11. New Zealand and Chile avocado exports: forecast v dispatch (5.5kg eqv. trays) August 2023 - February 2024									
NZ export to Australia		Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Total
Pre-Season Forecast (1) at 17/07/2023		28,160	121,120	171,840	204,160	315,040	237,600	89,024	1,166,944
Updated Season Forecast (1) at 29/08/2023		5,797	56,320	194,080	192,904	288,320	226,080	78,840	1,042,341
Dispatch volume Infocado (1)		5,797	7,041						12,838
Customs data: Australian imports from New Zealand [2]									
Customs data: NZ avocado exports - total non-Aus. [3]	Korea, South								
	China								
	Thailand								
	Taiwan								
	Other								
	Total								
Customs data: Australian imports from Chile [2]									

[1] Source: Infocado

[2] Source: IHS Markit - Global Trade Atlas (Imports)

[3] Source: IHS Markit - Global Trade Atlas (Exports)

Grey cell — Forecast is set and can no longer be updated

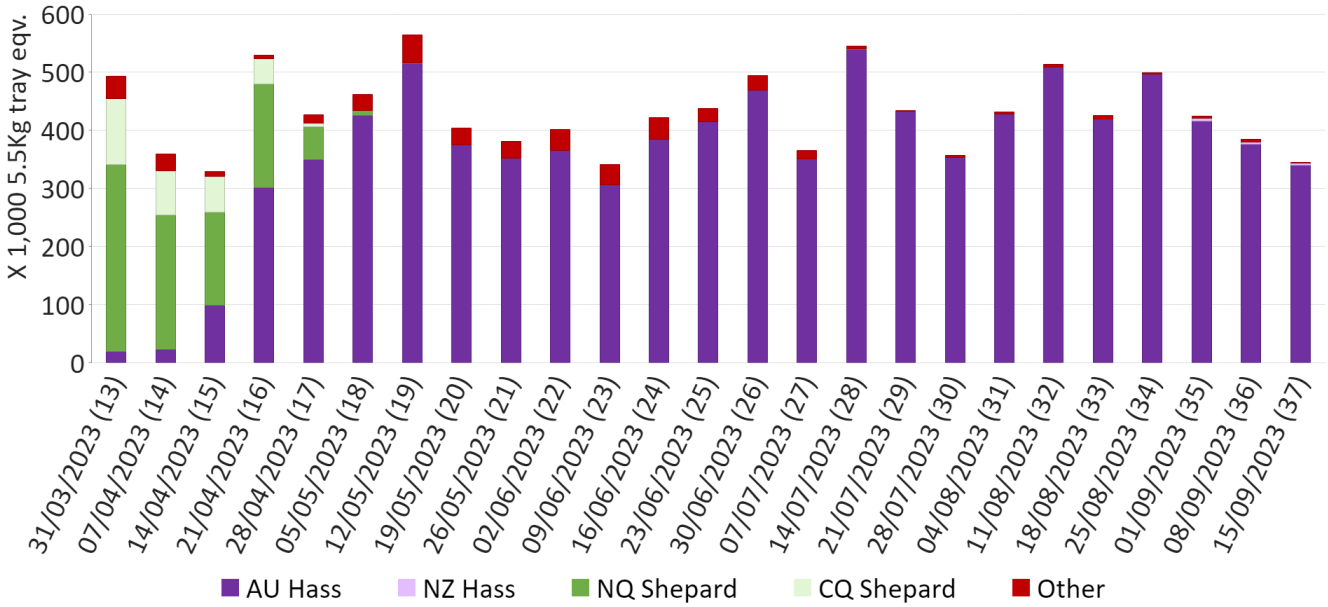
Green cell — Actuals (dispatch)

Yellow cell — Forecast can still be updated

black text — Data complete for the month / season

Red text — Data not yet complete for the month / season

Figure 12. Packers dispatch by variety - 31/03/2023 - 15/09/2023 (weeks 13 to 37)



4-weekly forecast

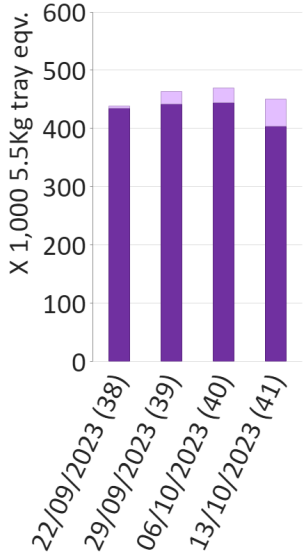
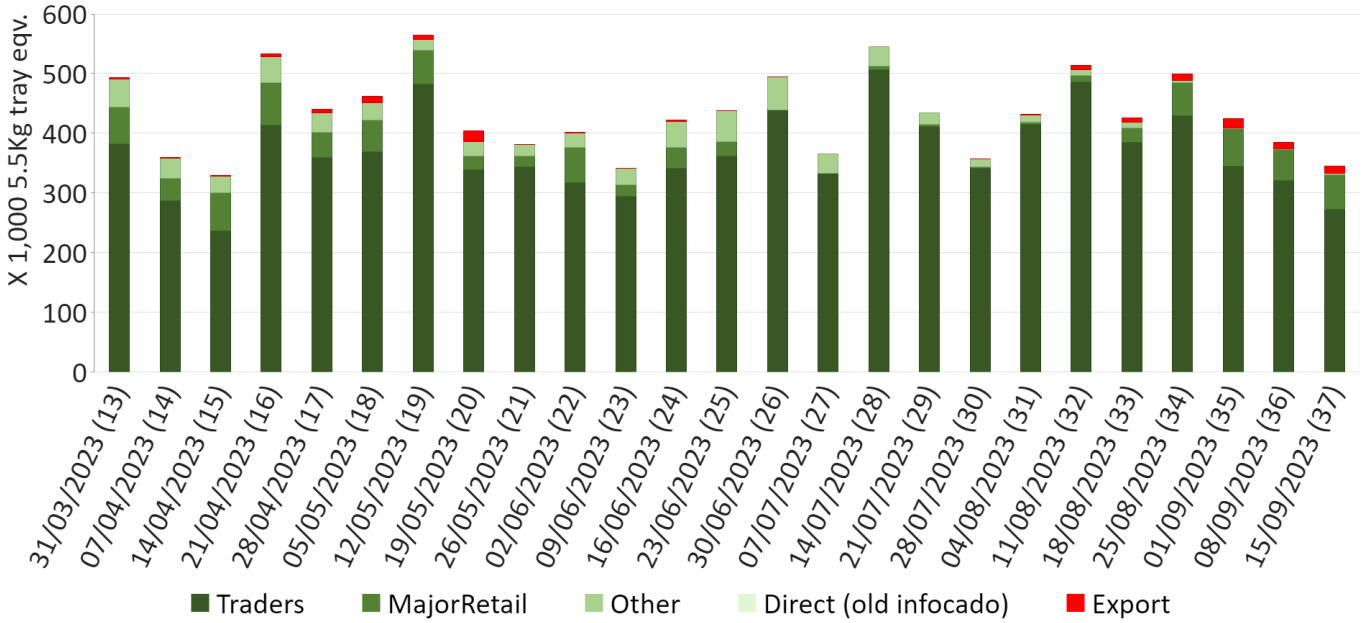
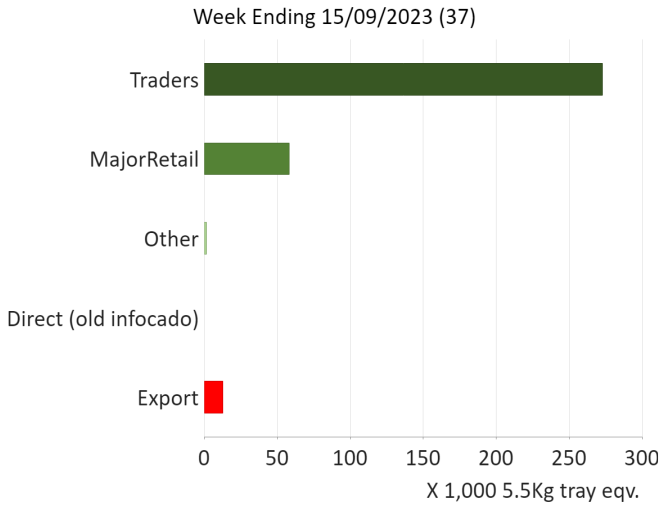


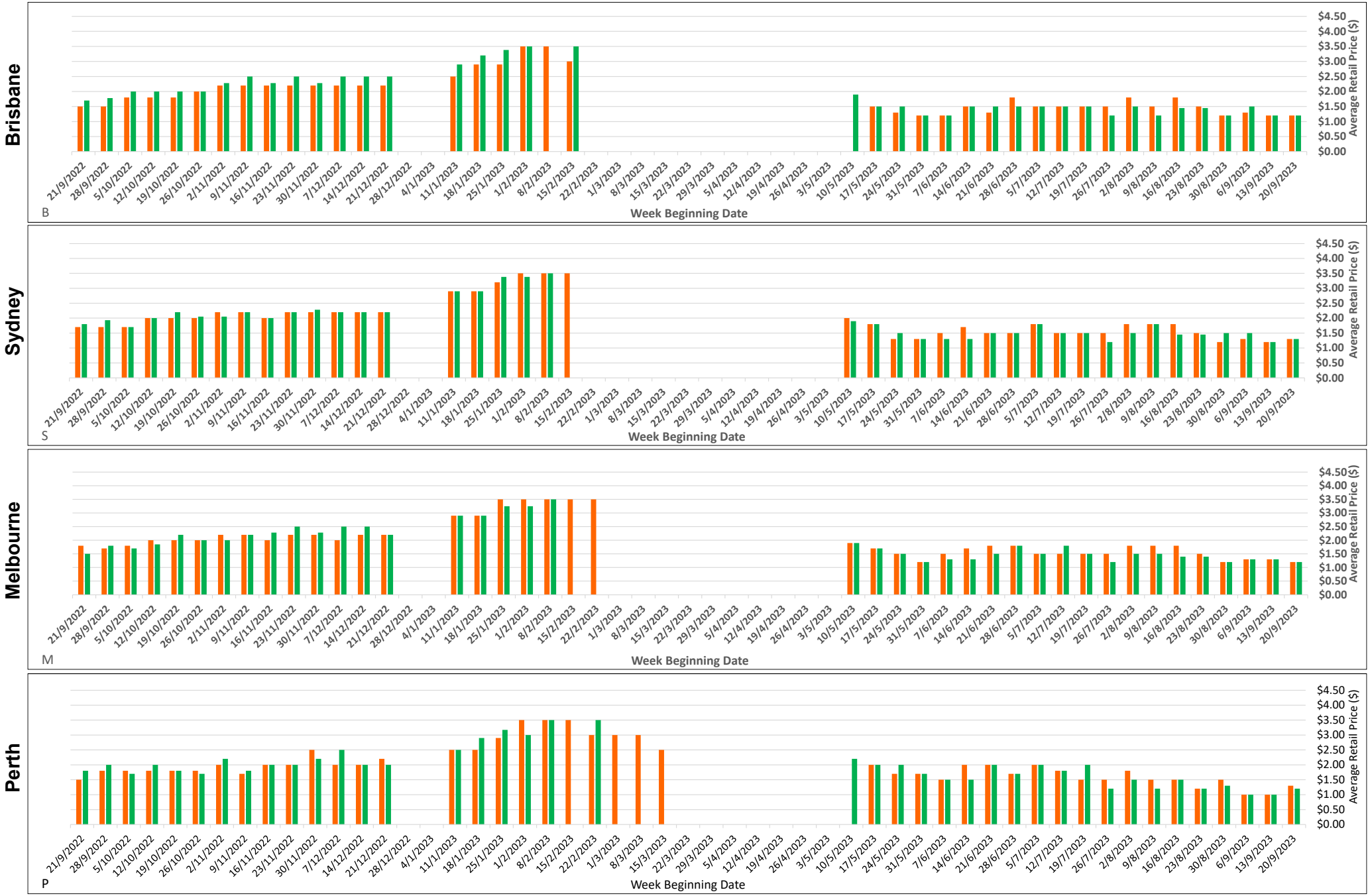
Figure 13. Packers dispatch by trade channel - 31/03/2023 - 15/09/2023 (weeks 13 to 37) **Trader**: a primary wholesaler, marketer, or consolidator. **Major Retail**: Woolworths, Coles, or Aldi. **Other**: any other outlet that is not a trader or major retail. The bar chart to the right shows the most recent week's data. **Note**: as most exports are via a Trader, the export volumes identified in this chart only represent exports direct from packhouse via freight forwarder.





Avocados Australia online retail pricing report **Reporting period: week 38-2023 (Wed 20/09/23 - Tue 26/09/23)**

Hass avocado single fruit online retail pricing over 12 months: Coles and Woolworths **Key: Coles online Woolworths online**



Avocado online retail pricing for Coles and Woolworths

Reporting period: week 38-2023 (Wed 20/09/23 - Tue 26/09/23)

	Pack Type	Variety	Description/ Origin	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass	Australian	$1.20*	$1.30↑*	$1.20↓*	$1.30↑*
	5 pack	not indicated	Australian	$5.00*	$5.00↑*	$5.00↑*	$4.00↓*
	1kg bag	not indicated	I'm Perfect	$4.50↑*	$4.50↑*	$4.50↑*	$4.50↑
	Organic Single fruit	not indicated	Australian	$3.90	$3.90	$3.90	
Woolworths	Single fruit	Hass	Australian	$1.20	$1.30↑	$1.20↓	$1.20↑
	5 pack	not indicated	Mini Avocados	$4.90	$4.50↓	$4.50↓	$5.00↑
	1kg Prepacked	not indicated	Odd Bunch	$4.00↓	$4.00↓	$4.50	$4.00
	Organic Single fruit	not indicated	Australian	$3.30↑	$3.50↑	$3.00	
	550g Organic mini fruit	not indicated	Australian			$5.50	
Single fruit average by city (Hass & Shepard, excluding organic)				$1.20	$1.30↑	$1.20↓	$1.25↑
Single fruit average (Hass & Shepard, excluding organic)			$1.24↑				

Catalogue offers on avocados:

Coles - Brisbane & Perth: Australian unspecified variety 5 pack $5 each

Coles - Sydeny & Melbourne: Australian Hass $1.30 each

Woolworths - Brisbane & Sydney: Australian Hass $1.20 each

Woolworths - Perth: Australian unspecified variety 1kg Odd bunch bag $4 each

Aldi - National: No catalogue offers

Foodworks - Sydney: Australian Hass $1.29 each

Foodworks - Perth: Western Australian Hass 2 for $3

IGA - Sydney: Australian Hass $1.20 each

Key:

*	advertised as a weekly and/or catalogue special
↑ (green)	increase in price from previous week
(yellow)	same price as previous week
↓ (red)	decrease in price from previous week

Notes for graphs on previous page:
Online retail pricing for Hass & Shepard single fruit

24/05/23 to 26/09/23 (Weeks 21– 38)
Coles single Shepard price not available nationally
Woolworths single Shepard price not available nationally

17/05/23 (Week 20)
Coles single Shepard price not available nationally
Woolworths single Shepard price not available nationally

10/05/23 (Week 19)
Coles single Hass price not available Bris & Perth
Coles single Shepard price not available nationally
Woolworths single Shepard price not available nationally

03/05/23 (Week 18)
Coles single fruit price not available nationally
Woolworths single Hass price not available nationally
Woolworths single Shepard price not available in Melb

26/04/23 (Week 17)
Coles single Hass price not available nationally
Woolworths single Hass price not available nationally

19/04/23 (Week 16)
Coles single Hass price not available nationally
Woolworths single Hass price not available nationally

12/04/23 (Week 15)
Coles single Hass price not available nationally
Woolworths single Hass price not available nationally

05/04/23 (Week 14)
Coles single Hass price not available nationally
Woolworths single Hass price not available nationally

29/03/23 (Week 13)
Coles single Hass price not available nationally
Woolworths single Hass price not available nationally

Avocados Australia research the online shopping and catalogue prices for avocados on Wednesdays when major supermarkets usually publish their weekly prices. Advertised weekly, prices are valid for seven days, Wednesday to Tuesday.

Hort Innovation Strategic levy investment | AVOCADO FUND

This project has been funded by Hort Innovation using the avocado research and development levy and funds from the Australian Government. For more information on the fund and strategic levy investment visit horticulture.com.au

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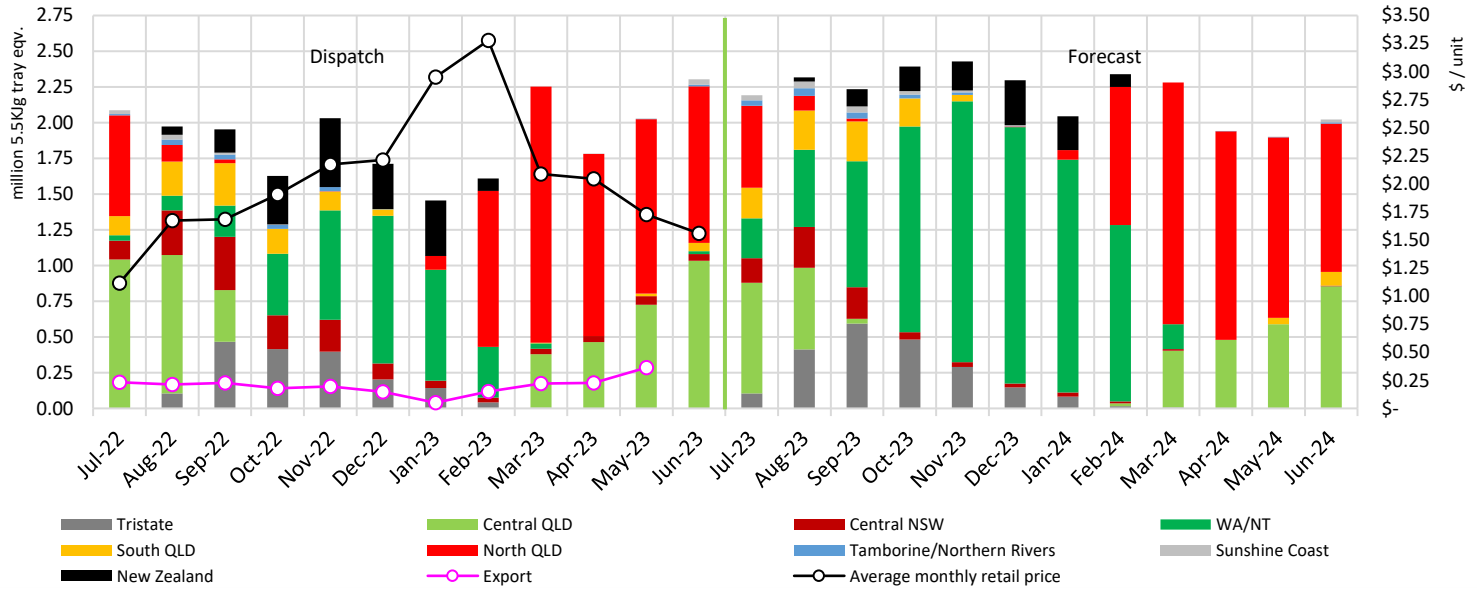
Quarterly Infocado Report Crop Forecast - July 2023

Avocados Australia releases four quarterly Infocado crop forecast reports per year, in the months January, April, July and October.

Australian Avocados **Forecast July '22 to June '23** (5.5 kg tray eqv.)													
	Jul 22	**Aug 22**	**Sep 22**	**Oct 22**	**Nov 22**	**Dec 22**	**Jan 23**	**Feb 23**	**Mar 23**	**Apr 23**	**May 23**	**Jun 23**	**Total**
Hass	1,837,190	1,834,754	1,541,494	1,385,085	1,391,637	1,184,341	736,393	393,651	92,837	695,716	1,780,356	2,092,050	14,965,504
Shepard	-	-	-	-	-	-	108,240	839,372	1,512,054	1,137,789	103,061	-	3,700,516
Other	22,854	11,751	23,753	15,271	42,576	64,079	31,392	19,266	76,531	123,743	178,303	135,147	744,666
Total	1,860,044	1,846,505	1,565,247	1,400,356	1,434,213	1,248,420	876,025	1,252,289	1,681,422	1,957,248	2,061,720	2,227,197	19,410,686
Australian Avocados **Dispatch July '22 to June '23** (5.5 kg tray eqv.)													
Hass	2,039,347	1,889,134	1,753,820	1,265,991	1,510,278	1,337,399	863,930	394,886	81,071	822,735	1,859,210	2,122,223	15,940,024
Shepard	-	-	-	-	-	-	95,110	1,051,489	2,030,595	896,302	11,500	-	4,084,996
Other	47,018	26,817	37,242	21,972	38,158	57,402	108,783	76,279	140,447	61,397	157,190	181,336	954,041
Total	2,086,365	1,915,951	1,791,062	1,287,963	1,548,436	1,394,801	1,067,823	1,522,654	2,252,113	1,780,434	2,027,900	2,303,559	20,979,061
Australian Avocados **Forecast July '23 to June '24** (5.5 kg tray eqv.)													
	Jul 23	**Aug 23**	**Sep 23**	**Oct 23**	**Nov 23**	**Dec 23**	**Jan 24**	**Feb 24**	**Mar 24**	**Apr 24**	**May 24**	**Jun 24**	**Total**
Hass	2,127,941	2,276,424	2,088,446	2,203,801	2,186,155	1,936,503	1,663,111	1,255,233	261,660	693,607	1,624,972	1,847,257	20,165,110
Shepard	-	-	-	-	-	-	65,811	955,703	1,847,587	1,112,496	82,077	-	4,063,674
Other	64,520	11,667	24,318	16,120	38,315	44,990	78,149	38,800	171,195	134,885	193,476	174,924	991,359
Total	2,192,461	2,288,091	2,112,764	2,219,921	2,224,470	1,981,493	1,807,071	2,249,736	2,280,442	1,940,988	1,900,525	2,022,181	25,220,144

Australian & New Zealand Avocados: July 22 to June 23 Dispatch / July 23 to June 24 Forecast



Jul 22 to Jun 23 Dispatches & Jul 23 to Jun 24 Avocado Production Estimates 5.5kg eqv. Trays			
Region	**Jul22 to Jun23**	**Jul23 to Jun24**	**% change**
North Queensland	7,417,266	7,185,860	-3%
Central Queensland	4,974,295	3,723,525	-25%
Sunshine Coast	114,927	190,109	+65%
Southern Queensland	1,102,490	1,152,945	+5%
Tamborine/Northern Rivers	152,829	188,702	+23%
Central NSW	1,658,243	845,763	-49%
Tristate	1,780,443	2,141,276	+20%
WA	3,778,569	9,791,964	+159%
New Zealand	1,832,300	1,166,944	-36%
Total	**22,811,362**	**26,387,088**	**+16%**

Avocado supply for April, May, & June (Q2) of 2023 was 2.15% lower than the forecast for the same period published back in April, with 6,111,893 5.5Kg trays dispatched compared with 6,246,165 5.5Kg trays forecast for the three months. When compared with the same period the previous year (April - June 2022: 5,337,569 5.5Kg trays), supply increased by 14.51%. The updated forecast for the coming quarter (Q3) of July, August, & September of 2023, is 6,742,596 5.5Kg trays, an increase of 10.32% compared with the previous quarter and 12.18% more than the volume dispatched the same period last year (6,010,721 5.5Kg trays).

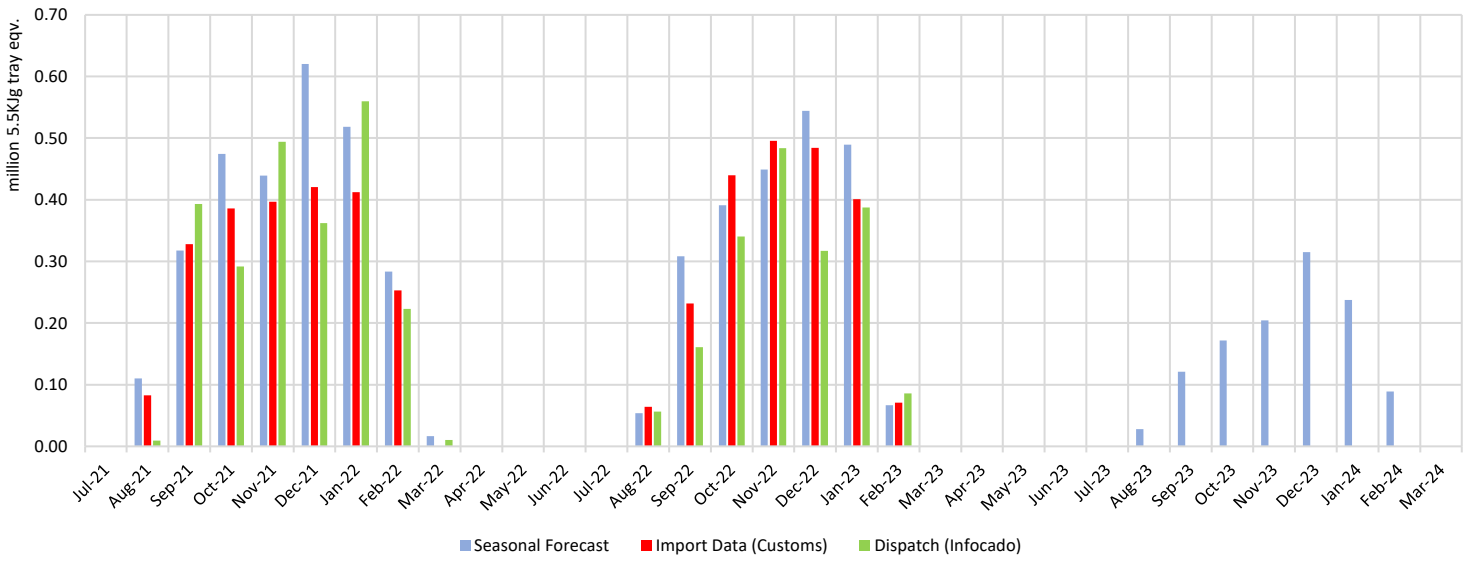
Compared with the past 12 months, the total volume forecast for the 12 months from July'23 to June'24 is expected to increase by 4,241,082 5.5Kg trays (+20.22%) for Australian fruit. The total forecast for the next 12 months including New Zealand is 26,387,088 5.5 Kgs trays. This is 3,575,726 5.5 Kg trays more (+15.68%) than the volumes dispatched in the previous 12 months (22,811,362 5.5Kg trays).

All regions are expected to be on the increase, apart from Central NSW, New Zealand, Central and North QLD which are expecting volumes to be down -49%, -36%, -25%, and -3% respectively for the next 12 months. We are expecting to see fruit volume out of Western Australia increase a remarkable +159% respective to last season.

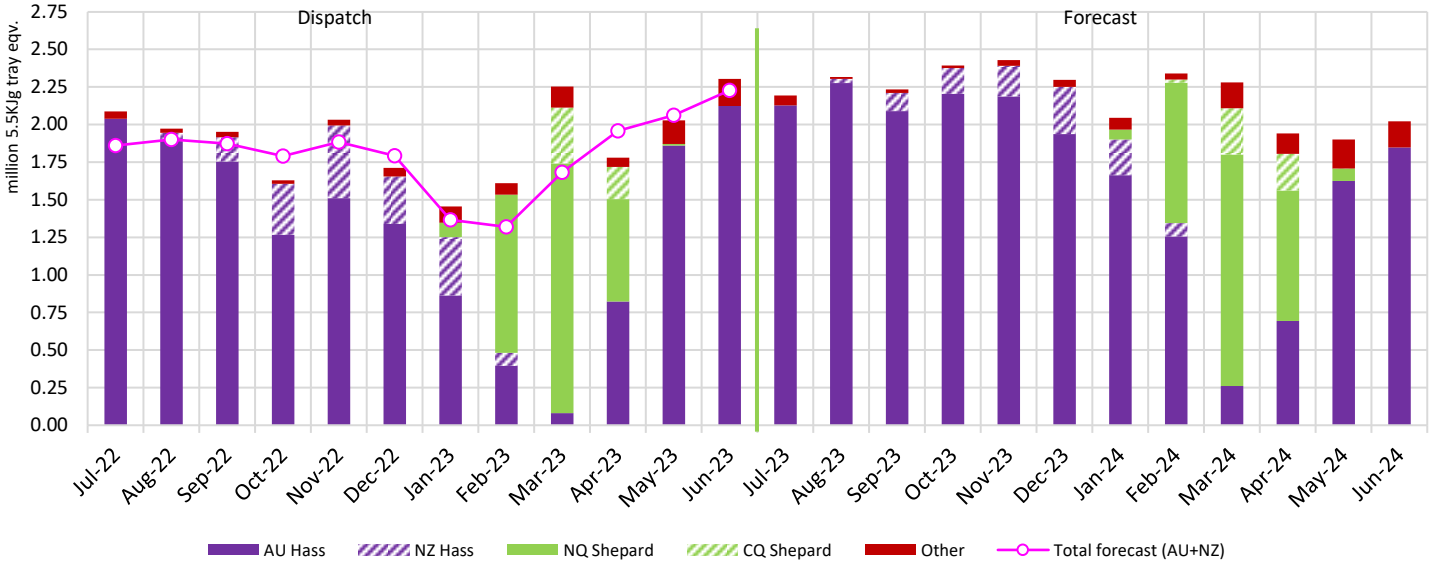
We have included the exported volume for the past 12 months in the figure above (source: IHS Global Trade Atlas, data for June'23 not yet available). The weighted average volume exported for the period is 9.34% of domestically produced volume.

Report notes: The Quarterly Infocado report is compiled using data collected through the Infocado system from an estimated 85+ % of industry packhouses, consolidators and wholesalers. Please note that the data in this report is slightly different from the weekly report you receive every Tuesday, as it includes additional data captured from sources other than direct online data entries. It is thus, not possible to extrapolate the figures from Weekly Infocado reports as a comparison. This report is provided initially to Infocado contributors only. Until public release, the report is confidential.

New Zealand Avocados: Dispatch and Forecast



Avocados by Variety: July 22 to June 23 Dispatch / July 23 to June 24 Forecast



Note: NZ dispatch figures in the above graph are from Infocado, the total forecast line (pink) indicates the most up to date forecasts.

Seasonal forecast direct contributors

Central Qld
Costa Avocado/SuperPak
Donovan Family Investment Trust
Lava Valley Produce
Natures Fruit Company (CQ)
Simpson Farms Pty Ltd
Sunny Bluff Produce Pty Ltd
Sunnyspot Packhouse Pty Ltd (CQ)

New Zealand
NZ Avocado Ltd

North Qld
Adil Farming
Aussie Orchards Growers & Packers (NQ)
Avocados with Altitude
Avogreen Orchards
Battistin Orchards Pty Ltd
Bellview Orchards Pty Ltd
Blue Sky Produce
Cadorin Orchards Pty Ltd
Cobra Hill Orchards
Costa Avocado/Avocado Estates
DBC Farming Pty Ltd
Delais Orchards Pty Ltd
Golden Triangle Avocados
Green Skin Avocados
Gunnado Farming Pty Ltd
Hinterland Avocados
Jennings Family Trust
JL Trimarchi & PM Trimarchi
Kureen Farming
Leadwood Pty Ltd
Manbulloo Ltd
Mountain Side Avocados
Rock Ridge Farming Pty Ltd
Rockley Partners
Rocky Creek Orchards Pty Ltd
Tinaroo Falls Avocado Trust
Tropico Farms

South Qld
B & M Trousdell Enterprises
Balmoral Orchard
Cherry Creek Orchards Pty Ltd
Googa Farms
In2avocados Pty Ltd
Minmore Fruits
Natures Fruit Company (SQ)
Sunnyspot Packhouse Pty Ltd (SQ)
Touchwood Farming
Wodonga Park Fruit and Nuts

Sunshine Coast
Bluegum Creek Produce Pty Ltd
Natures Fruit Company (SC)
Sunnyspot Packhouse Pty Ltd (SC)

Tamborine/Northern Rivers
Aussie Orchards Growers & Packers (TNR)
Jirel Holdings
Merrinee Farm
Summerland Farm
T W Silver
WJ Row

Tristate
60 Foot Orchards Pty Ltd
Barham Avocados
Churinga Orchards
Cutri Fruit
Golden Hill Packing Pty Ltd
Goldup Farms
J.G. Loffler
Kingston Avocado
Marrbiz Pty Ltd
Mildura Fruit Company
Parkes Lane Produce
Vitor Marketing Pty Ltd

WA/NT
Applewood Orchard
Avonova
Avowest
Bendotti Avocado
D & L Smith
Delroy Orchards
Licciardello & Son Orchards
Mariners Rest
Newton Orchards
R & S Bamess
The Avocado Collective
The Avocado Grove
West Aussie Avos
Willow Creek

CNSW less than 3 contributing packhouses

Infocado information is available at www.avocado.org.au/our-programs/supply-chain-data/infocado/ or contact us at infocado@avocado.org.au. This report has been 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. **Disclaimer**: Avocados Australia Limited (AAL) has taken all due care to ensure the accuracy of the data collected for this report. Contributors have been asked to participate in 'good faith' and provide accurate and complete data at all times. AAL takes no responsibility for the data that is entered. In no event shall AAL be liable for any special, direct, indirect, consequential, or incidental damages or any damages whatsoever, whether in an action of contract, negligence or other tort, arising out of or in connection with the use of the report or the contents of the report.

Market Intelligence Update Australian Avocado Exports Weekly to 27 August 2023

This report was developed for Avocados Australia Ltd from data of the Department of Agriculture Fisheries and Forestry (DAFF) Plant Export Operation for use by the Australian Avocado industry only. This report gives the Australian Avocado industry an insight on previous and current year export performance.

Australian Avocado until 27 August FY24 were 3,121 tonnes which was 55 per cent above the same period in 2022/23. Exports in the latest week were 492 tonnes. Hong Kong, Singapore, and Malaysia accounted for 96 per cent of all exports in FY23 and remain the largest destinations. **Japan has recorded 152 tonnes from WA for the 2023/24 over last 3 weeks**.

The ABS data for 12 months to June 2023 records 10,685 tonnes exported worth A$58.82m with a unit value of A$5.51 per kg (Table 3). If this was extrapolated to the 2023/24 YTD result the value would be $17.18m for the period subject to final ABS data.

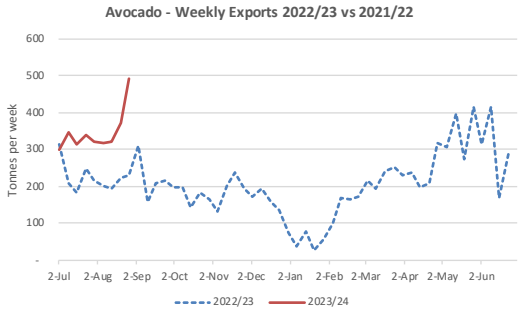
Table 1 : Avocados exported from Australia by week

Exports by Week

		YTD to week	27-Aug	
Week No	W/Ending	2022	2023	Difference
		Tonnes	Tonnes	%
26	2-Jul	313	**297**	*-5%*
27	9-Jul	207	**346**	*68%*
28	16-Jul	181	**314**	*73%*
29	23-Jul	247	**339**	*37%*
30	30-Jul	214	**322**	*50%*
31	6-Aug	200	**318**	*59%*
32	13-Aug	192	**319**	*66%*
33	20-Aug	222	**373**	*68%*
34	27-Aug	231	**492**	*113%*
35	3-Sep	311	-	
36	10-Sep	156	-	
37	17-Sep	207	-	
38	24-Sep	216	-	
39	1-Oct	197	-	
40	8-Oct	196	-	
41	15-Oct	144	-	
42	22-Oct	182	-	
43	29-Oct	163	-	
44	5-Nov	131	-	
45	12-Nov	202	-	
46	19-Nov	238	-	
47	26-Nov	192	-	
48	3-Dec	173	-	
49	10-Dec	195	-	
50	17-Dec	158	-	
51	24-Dec	135	-	
52	31-Dec	72	-	
1	7-Jan	38	-	
2	14-Jan	77	-	
FYTD	**27-Aug**	**2,007**	**3,121**	*55.5%*
Moving Annual Total		***10,685***		

Source: DAFF; Fresh Intelligence analysis

YTD Week ending **Sunday, 27 August 2023**



July to date	27-Aug
2021/22	2,007
2022/23	3,121
Change	55%

Table 3: Latest ABS Monthly

July to June		change	MAT
Tonnes	10,685	-8%	10,685
Million AUD	58.82	13%	58.82
A$ per kg	$5.51	23%	$5.51

Source: ABS via IHS Global Trade Atlas; Fresh Intelligence analysis

MAT = Moving Annual Total

2023/24 est Value $17.18 m

Table 4: FYTD Export by state*

States	FYTD (Tonnes)	share
NSW	**1,263**	40%
QLD	**1,132**	36%
VIC	**170**	5%
WA	**556**	18%
Total	**3,121**	**100%**
AIR	**1,658**	**53%**
SEA	**1,463**	**47%**

* establishment state of expo

Table 2 : Avocado Exports by Market Year to Date, by latest week and previous 4 weeks

	Last MAT	July to	Market	27/8/2023	20/8/2023	13/8/2023	6/8/2023	30/7/2023
Market	**Jun - May**	**27/8/2023**	**share**	**34**	**33**	**32**	**31**	**30**
	Tonnes	Tonnes	%	**Tonnes**	Tonnes	Tonnes	Tonnes	Tonnes
Hong Kong	5,074	**1,046**	42%	**218**	135	137	114	137
Singapore	3,403	**701**	28%	**125**	100	62	130	104
Malaysia	1,752	**544**	22%	**60**	117	66	70	77
Japan	277	**152**	6%	**82**	18	50	-	1
Indonesia	48	**5**	0%	**2.1**	-	0.7	0.6	-
Brunei Daruss	30	**3**	0%	**0.6**	1.0	-	-	-
United Arab E	22	**1**	0%	**0.5**	-	-	-	-
New Caledoni	22	**4**	0%	**-**	1	-	1	2
Fiji	18	**7**	0%	**1.8**	-	2	1	0
Qatar	10	**4**	0%	**-**	2	-	1	-
India	-	**3**	0%	**-**	-	-	1.5	-
Kuwait	0	**7**	0%	**2**	-	-	2	-
all other	30	**-**	0%	**0**	(0)	1	(2)	0
Total Tonnes	10,685	**2,477**	100%	**492**	373	319	318	322

Source: IHS Global Trade Atlas (2023); DAFF, Fresh Intelligence analysis (minor rounding errors may show negatives for low values)

Monthly Export / Import Update

July 2023

EXPORTS

In July 23, first month of the 2023/24 year, exports of avocados recorded **1,423** tonnes worth A$6.29m and was **42 per cent** above the same month last year (Table 1). The overall value increased by 46 per cent. Unit values were 2 per cent higher at AU$4.42 per kg (FOB).The MAT (Moving Annual Total) was 11,091 tonnes, up 3.8 per cent since the previous month's MAT showing increased momentum.

Table 1 : Avocado Key Measures

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	1,423	42%	11,091
Value (M AUD)	6.29	46%	60.7
$ per kg (FOB)	$4.42	2.9%	$5.48

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market with 672 tonnes, up 24 per cent followed by Singapore +46%) and Malaysia (+100%). These markets accounted for 96 per cent of the annual exports to date.

There were 19 tonnes exported to Japan (+16%) from Western Australia in July, and small consignments to Indonesia and other markets (Table 3).

Table 3 : Avocado Exports by Market

July to July

Market	2021/22	2022/23	Chg LY	share	MAT
	Tonnes	Tonnes	%	%	Tonnes
Hong Kong	541	672	24%	47.2%	5,205
Singapore	296	431	46%	30.3%	3,532
Malaysia	141	283	100%	19.9%	1,887
Japan	16	19	16%	1.3%	279
Indonesia	1	4	675%	0.3%	52
Fiji	4	4	-4%	0.3%	17
Qatar	0	3	1961%	0.2%	13
Brunei Darussalam	3	3	1%	0.2%	30
New Caledonia	2	2	-26%	0.1%	21
India	-	3		0.2%	9
Saudi Arabia	-	0		0.0%	16
United Arab Emirates	0	0		0.0%	22
all other	*0*	*0*			7
Total YTD Tonnes	**1,004**	**1,423**	42%	100%	**11,091**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 2. Avocado By State

July to July

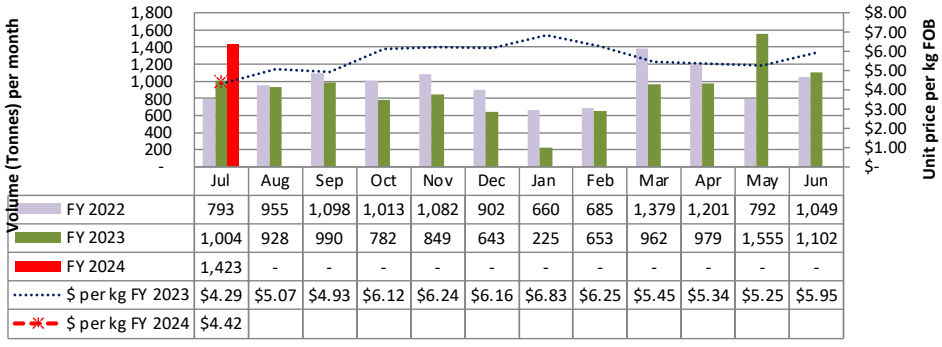
	2022/23	2023/24	Chg LY	share	MAT
	Tonnes	Tonnes	%	%	Tonnes
Queensland	807	1,120	39%	79%	7,517
New South Wales	131	140	7%	10%	1,536
Western Australia	17	140	715%	10%	1,333
Victoria	45	15	-66%	1%	432
South Australia	4	7	76%	0%	270
Other	-	0		0%	3
Total	**1,004**	**1,423**	42%	100%	**11,091**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Queensland was the largest export state for the month and 39 per cent higher to 1,120 tonnes. Western Australia was 7 x higher to 140 tonnes for the first month of the season (Table 2).

On a month to month basis the July exports were also 42 per cent higher at 1,423 tonnes compared to 1,004 tonnes a year ago and FOB prices were 2.9 per cent higher at A$4.42 per kg (Figure 1).

Figure 1 Avocado Exports per month vs last 2 years



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2022	793	955	1,098	1,013	1,082	902	660	685	1,379	1,201	792	1,049
FY 2023	1,004	928	990	782	849	643	225	653	962	979	1,555	1,102
FY 2024	1,423	-	-	-	-	-	-	-	-	-	-	-
$ per kg FY 2023	$4.29	$5.07	$4.93	$6.12	$6.24	$6.16	$6.83	$6.25	$5.45	$5.34	$5.25	$5.95
$ per kg FY 2024	$4.42											

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Sea freight accounted for 41 per cent of avocado shipments in July lifting 67 per cent compared to July last year.

Table 4. Avocado By Transport Mode

July to July

	2022/23	change	share
	Tonnes	%	%
Air	840	28%	59%
Sea	583	67%	41%
Total	**1,423**	42%	100%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Monthly Export / Import Update

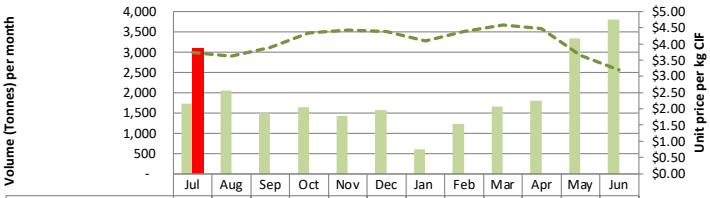
July 2023

MARKET INSIGHTS

Hong Kong (July 23)

Hong Kong imported 3,083 tonnes of avocados in **July 23**, which was 78 per cent more than the previous year. More than 60 per cent is re-exported to China. Australia supplied 532 tonnes or 2.3 per cent more. Peru is the largest supplier and was up 76 per cent to 2,342 tonnes where most of this is reexported to China. Mexico was 20 per cent higher to 192 tonnes.

Figure 3 Hong Kong Avocado Imports

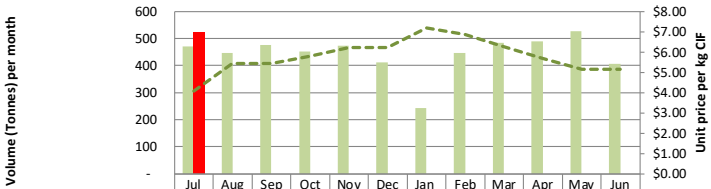


	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2022/23	1,726	2,042	1,494	1,630	1,413	1,565	593	1,220	1,656	1,805	3,336	3,805
FY 2023/24	3,083	-	-	-	-	-	-	-	-	-	-	-
$ per kg FY 2022/23	$3.74	$3.62	$3.89	$4.34	$4.42	$4.39	$4.09	$4.39	$4.58	$4.46	$3.64	$3.19
$ per kg FY 2023/24	$3.03											

Singapore (July 23)

Singapore imported 521 tonnes of avocados in **July 23**, 10 per cent more than last year. Australia supplied 419 tonnes or 27 per cent more than a year ago accounting for 80 per cent market share. Kenya supplied 27 per cent less or 48 tonnes while Peru entered the market with 8 tonnes. Australia's recorded CIF prices were A$5.34 in July compared to A$4.96 average for all suppliers.

Figure 3 Singapore Avocado Imports

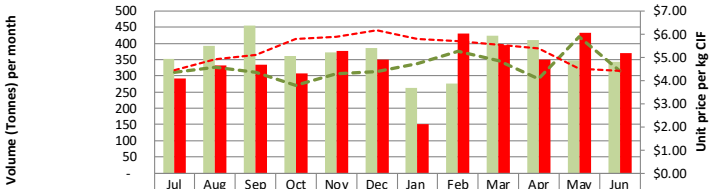


	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2022/23	471	446	475	453	473	411	244	446	485	490	527	407
FY 2023/24	521	-	-	-	-	-	-	-	-	-	-	-
$ per kg FY 2022/23	$4.07	$5.43	$5.44	$5.79	$6.21	$6.22	$7.19	$6.88	$6.27	$5.67	$5.16	$5.14
$ per kg FY 2023/24	$4.96											

Malaysia (June 23)

Malaysia has imported 4,121 tonnes of avocados in **12 months to June 23**, which was 6.0 per cent less than last year. Australia supplied 2,369 tonnes or 16 per cent less than last year and holds 57 per cent market share. United States, Mexico and Philippines ramped up supplies again from low bases. Australian CIF prices were recorded A$6.62 average for the year and dropped to $5.45 in June (No later updates).

Figure 3 Malaysia Avocado Imports



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2022	353	392	456	360	373	386	263	277	423	411	348	344
FY 2023	292	331	333	308	376	351	151	430	395	351	432	371
$ per kg FY 2022	$4.35	$4.58	$4.34	$3.79	$4.29	$4.37	$4.72	$5.26	$4.85	$4.06	$5.88	$4.42
$ per kg FY 2023	$4.44	$4.92	$5.10	$5.79	$5.89	$6.16	$5.80	$5.68	$5.53	$5.39	$4.52	$4.42

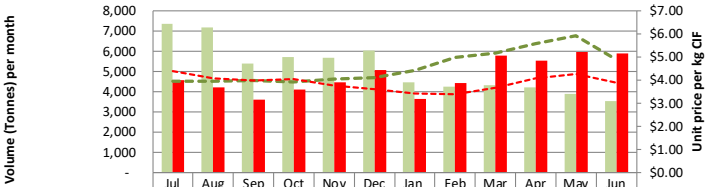
Monthly Export / Import Update

July 2023

Japan (Jun 23)

Japan imported 57,173 tonnes of avocados in **12 months to June 23** and is 4.9 per cent higher than last year. Australia supplied 293 tonnes. Mexico, the lead supplier, was 6.3 per cent lower to 42,773 tonnes though has lifted 32 per cent in the last 5 months. Peru increased 23 per cent to 10,367 tonnes. Australia's recorded average CIF price was A$4.77 compared to average A$3.88 from all sources, influenced by Mexico and Peru.

Figure 4 Japan Avocado Imports



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2021/22	7,367	7,162	5,395	5,693	5,684	6,017	4,455	4,251	4,313	4,187	3,870	3,521
FY 2022/23	4,557	4,193	3,611	4,078	4,468	5,071	3,634	4,403	5,787	5,513	5,959	5,900
$ per kg FY 2022	$3.94	$3.94	$3.99	$3.90	$4.04	$4.10	$4.41	$4.99	$5.16	$5.57	$5.91	$4.89
$ per kg FY 2023	$4.37	$4.08	$3.97	$4.03	$3.74	$3.61	$3.42	$3.38	$3.66	$4.08	$4.25	$3.88

India (June 23)

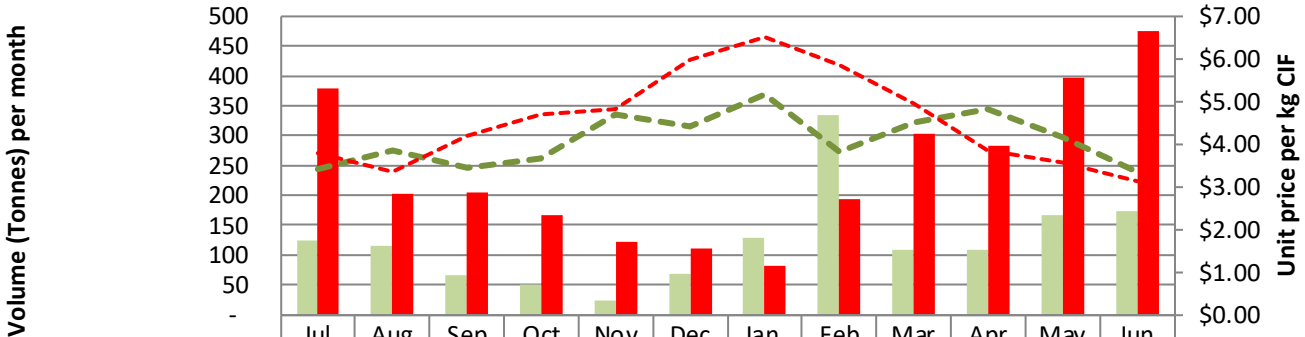
India imported 2,916 tonnes of avocados in **12 months to June 23** and is 159 per cent above last year. Tanzania supplied 2,222 tonnes is its first full year of access and now leads the trade with 76 per cent share. Netherlands (ex Peru) is 27 per cent lower and Peru is 95 per cent lower with just 11 tonnes. Australia's first consignments were recorded in these June figures with more to follow in July.

Table 9 : Avocado Imports by India

	Jul to June				Year to date	Month of
Market	FY 2022/23	**Chg LY**	share	Value	***Unit Value***	***June***
	Tonnes	%	% YTD	A$ Mill	*A$ per kg CIF*	*A$ per kg CIF*
Australia	**3**	**++**	0%	**0.0**	***$2.91***	***$2.91***
Tanzania	2,222	**2908.2%**	76%	8.6	*$3.85*	***$3.12***
New Zealand	277	**-34.5%**	10%	1.7	*$6.07*	
Netherlands	312	**-27.2%**	11%	1.6	*$5.24*	***$3.66***
Peru	11	**-94.6%**	0%	0.0	*$3.74*	
Other	91		3%	0.3		
Total YTD Tonnes	**2,916**	**159.5%**	100%	12.1	***$4.16***	***$3.12***

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

India Avocado Imports



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2021/22	123	114	67	49	24	67	128	333	108	109	167	173
FY 2022/23	378	202	204	167	121	110	82	194	303	283	397	475
$ per kg FY 2022	$3.41	$3.85	$3.44	$3.66	$4.69	$4.42	$5.17	$3.83	$4.49	$4.82	$4.17	$3.35
$ per kg FY 2023	$3.77	$3.33	$4.19	$4.68	$4.82	$5.98	$6.50	$5.86	$4.95	$3.85	$3.55	$3.12

Monthly Export / Import Update

July 2023

IMPORTS

The imports for the 2022/23 import season arrived mostly from New Zealand. Imports of avocados were **12,896** tonnes worth A$54.7m or 2 per cent more than last year (Table 9). Unit values increased 33 per cent to A$4.52 and has meant the overall value increased by 36 per cent for the period. The MAT (Moving Annual Total) was 12,896 tonnes easing 0.4 per cent in the month.

Table 10 : Import Key Measures

IMPORTS	YTD (from July	Chg LY	MAT
Volume (tonnes)	12,896	2%	12,896
Value (M AUD)	58.35	35%	58.4
$ per kg	$4.52	28.7%	$4.52

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 11 : Avocado Imports by Market
July to April

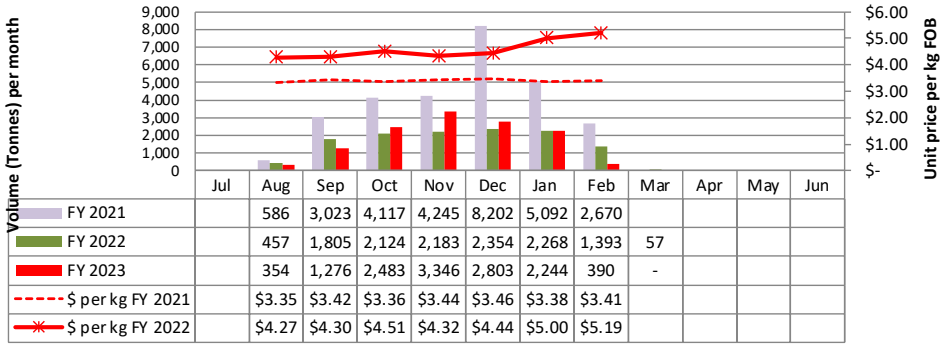
Market	2022/23	Chg LY	Value	Unit Value
	Tonnes	%	A$ Mill	*A$ per kg*
New Zealand	12,029	-5%	54.7	*$4.54*
Chile	868		3.7	*$4.26*
Total YTD Tonnes	**12,896**	**2%**	58.4	***$4.52***

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

868 tonnes were recorded imported from Chile.

February imports recorded 390 tonnes, pulling up early compared to 1,393 tonnes for the same month last year (Figure 2), and considerably less than the 2,670 tonnes recorded in February 2021 when Australia had a supply shortage. No further imports are expected until August 2023.

Figure 2 Avocado Imports per month vs last 2 years



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2021		586	3,023	4,117	4,245	8,202	5,092	2,670				
FY 2022		457	1,805	2,124	2,183	2,354	2,268	1,393	57			
FY 2023		354	1,276	2,483	3,346	2,803	2,244	390	-			
$ per kg FY 2021		$3.35	$3.42	$3.36	$3.44	$3.46	$3.38	$3.41				
$ per kg FY 2022		$4.27	$4.30	$4.51	$4.32	$4.44	$5.00	$5.19				

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

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