

## **Final Report**

# **Avocado export strategy 2022-2026**

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Avocados Australia

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AV21000

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Avocado export strategy 2022-2026 (AV21000)

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## Public summary

The current Australia Avocado Export Strategy (2019-2021) has served the industry well. However, a significant shift in industry dynamics, driven by increased Australian and global supply, now requires much increased investment and effort in export development. Hence, the objective of this project is to deliver a new Avocado Export Strategy (2022-2026) (Export Strategy) to help guide the export development so that industry can optimise commercial outcomes both in the short- and long-term, recognising the increasingly challenging and globally competitive environment in which it now and in the future will operate.

The new Export Strategy will also importantly assist Hort Innovation to identify export development and growth opportunities for the Australian avocado industry and prioritise investments in this area. It will provide direction for export activity, including market access prioritisation and development, industry export capability building, and international market development. In addition, it will also inform effective R&D and marketing investments and provide supporting data and information for future market access and improvement applications to the International Market Access Assessment Panel (IMAAP).

Avocados Australia's approach to this project has been to develop a White Paper to succinctly capture the current state of the industry, the challenges it faces, the available opportunities. This was then communicated and tested with a broad range of stakeholders, through a tailored consultation process, before developing a draft Export Strategy (and its objectives, rationale, sub strategies and desired outcomes), which was provided to industry for comment before the Export Strategy was finalised.

This approach provided a mechanism for sharing detailed information, educating stakeholders, and finding industry consensus on export development and growth initiatives, priority activities and investments. As a result, the Export Strategy articulates a clear understanding of export development and growth opportunities.

This project contributes to the Avocado Industry Strategic Investment Plan (2022 – 2026), most directly in relation to Outcome 1: Demand creation - demand creation supports the Australian avocado industry to develop existing and future domestic and international markets and specially the following strategies:

- Strategy 2: Increase international consumer demand for fresh, quality Australian avocados through improving knowledge, attitudes, and purchase intent
- Strategy 3: Develop a strategic plan for market access and trade development opportunities
- Strategy 4: Improve technical access to high-value markets as identified within the export strategic plan.

It also provides a number of benefits, including:

- A clear understanding and articulation of export development challenges and growth opportunities
- Industry consensus on export development and growth priority activities and investments
- Focused volume targets to an increased number of markets.

And helps support:

- Decision making in relation to new market access or market improvement applications to IMAAP
- Increased volume and value of export to an increased number of markets
- Increased levy payer participation in export supply chains
- Awareness and adoption of the project reports and recommendations throughout industry and Hort Innovation.

The industry has set a clear volume target to export at least 20,000 tonnes by 2026 at sustainable pricing. To help achieve this the project has provided:

- The Avocado Export Strategy (2022-2026)

- A White Paper (updated 25 May 2022)
- International Market Analysis (Fresh Intelligence Consulting)
- Situation Analysis (Garry Goucher & Associates)
- Phytosanitary market access matrix (current as at 14 March, 2022).

Due to the commercial sensitivity of some information in the Export Strategy and accompanying documents, its distribution is limited and available through Hort Innovation on request.

## Keywords

Avocado, export, trade, export development, international trade, market access, market improvement

## Introduction

The current Australia Avocado Export Strategy (2019-2021) has served the industry well. However, a significant shift in industry dynamics, driven by increased Australian and global supply, now requires much increased investment and effort in export development. Hence, the objective of this project is to deliver a new Avocado Export Strategy (2022-2026) (Export Strategy) to help guide the export development so that industry can optimise commercial outcomes both in the short- and long-term, recognising the increasingly challenging and globally competitive environment in which it now and in the future will operate.

The Australian avocado industry has seen many years of continual production growth to supply the increasing demand in the Australian domestic consumer market. This growth has been underpinned by increased planting and strong R&D programs that have provided productivity increases. At the same time, effective market development and promotion programs have driven consumer demand, providing a scenario where there was significant unmet demand in the market. This combination of increasing supply and increasing demand, fostered a period of record returns for growers. As such over the last decade there has been limited incentive for growers or marketers to look at major expansion plans for export markets.

With the desire to capitalise on ongoing unmet demand in the Australian market, Australian commercial businesses responded by continuing to increase plantings. In the past 5 years 6,400 ha of new orchards have been planted, 43% of total plantings. This is resulting in increasing supply, to the point where supply is now exceeding demand in the domestic market and returns to growers in 2021 have significantly diminished. There is now evidence, in some cases, the return on export markets would be greater than the domestic market.

The recent updated long-term crop forecast by Avocados Australia estimates that Australia's production will reach 170,000 tonnes by 2026 based on current plantings and average yields. This is more than double the production in 2020-21.

The industry has identified in its Industry Strategic Plan (2022 – 2026) that it needs to significantly increase both domestic consumption and grow export markets to avoid a significant long-term decline in terms of trade for the industry. Hence, the new Export Strategy is required to not only capture the available and future opportunities, but also provide pathways to achieving commercial outcomes around these, whilst mitigating risks that potentially impede the industry achieving its goals. Currently the goal of the industry is to be exporting at least 20,000 tonnes of avocados by 2026 at sustainable pricing.

The Australian industry has already started to respond by building export markets and increased export volumes from 1,786 tonnes (AUD12million) in 2017/18 to 4,051 tonnes (AUD25million) in 2019/20, representing an average annual growth rate in volume and value of 50.6% and 46.8% respectively, albeit off a very low base.

Since March 2020, despite constraints due to Covid, including limited access to flights, increased transport costs, and variable demand in markets, the industry has seen exports reach 11,275 tonnes MAT as at April 2022. This represents approximately 9% of production over this period. This export growth is considered to be primarily driven by reduced price of Australian fruit as a result of oversupply, meaning the Australian product is more price competitive and as a result is replacing fruit from other less desired source countries.

Despite the current challenges the industry has set a target to increase exports to at least 20,000 tonnes and domestic consumption to at least 150,000 tonnes within five years. These targets are outlined in the recently completed Avocado Industry Strategic Plan (2022-2026).

Given the goal to increase exports to at least 20,000 tonnes, the new Export Strategy needs to target markets with the capacity to collectively absorb the required increased volume at sustainable prices. The existing, primarily non-protocol, markets have limited capacity to grow (e.g., Singapore's total imports are relatively stable, however market share changes based on product competitiveness) and to meet the future export volumes of the Australian industry. Therefore, the focus needs to be on larger markets, which are predominantly phytosanitary protocol markets. Sustained efforts are required to continue to progress workable market access protocols based on robust data packages.

Most Australian avocado growers and exporters have no or limited experience in meeting the requirements of international phytosanitary protocols. Significant effort will need to be directed to helping growers, packers and exporters adopt new market access protocols and incorporate the requirements into their business processes.

The new Export Strategy has been developed to guide activities and investment in relation to future export development so that the Australian avocado industry can successfully build export markets to reach desired goals.

The new Export Strategy will also importantly assist Hort Innovation, Avocados Australia and commercial stakeholders to identify export development and growth opportunities for the Australian avocado industry and prioritise investments in this area. It will provide direction for export activity, including market access prioritisation and development, industry export capability building, and international market development. In addition, it will also inform effective R&D and marketing investments and provide supporting data and information for future market access and improvement applications to the International Market Access Assessment Panel (IMAAP).

This project contributes to the Hort Innovation Avocado Strategic Investment Plan (2022 – 2026) , most directly in relation to Outcome 1: Demand creation - demand creation supports the Australian avocado industry to develop existing and future domestic and international markets and specially the following strategies:

- Strategy 2: Increase international consumer demand for fresh, quality Australian avocados through improving knowledge, attitudes, and purchase intent
- Strategy 3: Develop a strategic plan for market access and trade development opportunities
- Strategy 4: Improve technical access to high-value markets as identified within the export strategic plan.

It will also align with several strategies in:

- Outcome 3: Extension and capability - Improved capability and an innovative culture in the Australian avocado industry maximises adoption of best practice and innovation in productivity and demand, and
- Outcome 4: Business insights - Improved decision-making in the Australian avocado industry through the use of consumer knowledge and tracking, trade data, production statistics and forecasting, and independent reviews.

The Export Strategy provides several benefits, including:

- A clear understanding and articulation of export development challenges and growth opportunities
- Industry consensus on export development and growth priority activities and investments
- Focused volume targets to an increased number of markets.

And helps support:

- Decision making in relation to new market access or market improvement applications to IMAAP
- Increased volume and value of export to an increased number of markets
- Increased levy payer participation in export supply chains
- Awareness and adoption of project report and recommendations throughout industry and Hort Innovation.

## Methodology

### Objective

To develop an Australian Avocado Export Strategy to assist Hort Innovation identify export development and growth priorities for the Australian Avocado Industry.

The Strategy is to:

- Direct export activity by industry (and inform government), including market access prioritisation and development, industry export capability building, and international market development.
- Be a resource for growers/exporters looking to develop their export capability, identify international market opportunities, and grow their exports
- Be a resource to inform effective R&D and marketing investments by Hort Innovation through levy or frontier funds in export development projects related to market access, industry capability, or international market development
- Provide data and information to support the development of business plans required for market access and improvement applications to the International Market Access Assessment Panel (IMAAP) (previously TAP). Note, development of business plans for market access and improvement applications are currently part of AV20004.

### Broad approach

Avocados Australia's approach to this project has been to develop a White Paper to succinctly capture the current state of the industry, the challenges it faces, the available opportunities. This was then communicated and tested with a broad range of stakeholders, through a tailored consultation process, before developing a draft Export Strategy (and its objectives, rationale, sub strategies and desired outcomes), which was provided to industry for comment before the Export Strategy was finalised.

This approach provided a mechanism for sharing detailed information, educating stakeholders, and finding industry consensus on export development and growth initiatives, priority activities and investments. As a result, the Export Strategy articulates a clear understanding of export development and growth opportunities.

Avocados Australia also noted the significant amount of the thinking and planning embodied in the current Australian Avocado Export Strategy 2019-2021, the ongoing industry development activity, and the role of the Avocado Export Development Manager (employed as part of AV20004) is still integral to the future development of the industry.

### Steps

The key steps involved in developing the Export Strategy were as follows:

#### 1. Project governance: Project Reference Group (PRG), planning and reporting

A PRG was formed. An initial meeting was held to update the PRG on the approach to the project, proposed meetings and to receive feedback. The PRG were engaged at key points throughout the project and at finalisation of the Export Strategy. Members of the PRG are provided in the Acknowledgment section.

A Program Logic and Monitoring & Evaluation Plan, Risk Plan and Monthly Milestone Report were submitted to Hort Innovation as required (*provided at Milestone 102*).

#### 2. Review of existing materials, initiatives and export performance

Existing export metrics, trends, relevant and aligned projects and recent reports were reviewed by the project team.

#### 3. Report Card

The progress of industry was assessed against the current Export Strategy (2019-2021) to understand the achievements, challenges, and emerging issues.

*Completed - Report Card provided in Appendix 1.*

#### **4. Phytosanitary market access status matrix**

A phytosanitary market access status matrix was developed for the avocado industry.

*Completed - Phytosanitary Matrix provided in Appendix 2.*

#### **5. Internal Workshop to assess industry capability and review R&D requirements to support market access requirements**

The Project Team met to assess current industry export activities and capability plus the challenges and opportunities (short and long term). The collective and deep knowledge of the Team, as well as a detailed International Market Analysis of 20 potential import markets completed by Fresh Intelligence Consulting was used to inform workshop discussions. Current active markets, markets in the DAWE Pool for future market access / improvement negotiations, future phytosanitary markets being considered, other possible phytosanitary markets and other non-phytosanitary markets that are not part of the current strategy (such as Europe / UK) were assessed to validate and/or understand the opportunity available for Australian avocados.

A review of R&D requirements to support market access and maintenance was also undertaken.

The information collected as part of this process was incorporated into the White Paper and Export Strategy.

*Completed - International Market Analysis (Fresh Intelligence Consulting) provided in Appendix 3.*

#### **6. Situational Analysis (Price modelling):**

An analysis was undertaken by Garry Goucher (Garry Goucher & Associates) to understand the relationship between demand in potential export markets and likely returns to growers, taking into account the domestic demand outlook. It explores a range of volume targets and their potential impact on returns.

*Completed – available on request to qualified parties through Avocados Australia.*

#### **7. Stakeholder Engagement, Consultation and Communication plan.**

A comprehensive stakeholder engagement, consultation and communication plan was developed, to communicate with and engage as many relevant stakeholders as possible to encourage their participation in the consultation process through one of the mechanisms available.

The Plan facilitated:

- registration of Australian industry stakeholders (54 people),
- the dissemination of information about the new Export Strategy and the development process,
- dissemination of relevant documentation to registered stakeholders including the White Paper, International Market Analysis, the draft Export Strategy, and the final Export Strategy once approved by Hort Innovation).
- engagement in the consultation and feedback process including invitations to participate in Export Forums and AvoConnections, online survey, one-one consultation, Export Strategy webinar, review of a Draft Export Strategy, a feedback loop and a final Export Strategy. Stakeholders had multiple ways to access the process, including access to written material, interviews, online information sessions and presentations at Export Forums.

All communications components were extended through Avocados Australia's network as part of the Avocado Industry Communication project (AV18003).



*Completed - Stakeholder Engagement, Consultation and Communication Plan provided to Hort Innovation at Milestone 102.*

## **8. White Paper**

A White Paper was developed based on review and consultation work completed.

The objective the White Paper was to:

Inform Australian avocado industry stakeholders about the current state of the industry, industry challenges and the opportunities for future export development that will likely present over the next five years.

Provide realistic targets (volumes and pricing for specific countries) for the market development, which was presented as Market Demand / Feasibility Matrix. This Matrix identifies the combination of markets that have the best capacity to accept the volume of fruit that is targeted to be exported, at sustainable price levels.

Provide a mechanism to receive informed feedback / comments from industry stakeholders about the possible approaches to support export market development.

The rationale for this approach was that many avocado industry stakeholders are well informed, and provision of this information in a concise manner allowed those being consulted to absorb and consider facts prior to consultation or providing feedback.

The content of the White Paper was tested with the PRG and adjusted before being provided to all parties who registered for the consultation process related to the development of the Export Plan.

*Completed - White Paper provided in Appendix 4.*

## **9. Consultation**

A series of fit-for-audience Consultation Surveys were developed to:

Test / validate information and ideas provided in the White Paper, including priority markets and target volumes articulated in the Market Demand / Feasibility Matrix.

Explore possible future scenarios, including markets, market development (including promotion), other industry and business requirements

Explore challenges that businesses will need to address to be effective contributors to export supply chains (either as growers, exporters, importers, retailers), including cost competitiveness, fruit quality, access to freight / CA technology etc.

Discuss research (including market access research, quality / fruit robustness research, aligned (quality) production research, cold chain technologies (e.g., use of CA, postharvest fruit coatings, monitoring and analytics), export process improvements etc., technology, industry / government policy, financial, export efficiency (process, documentation, payment), grower/exporter and market education, future data needs, or other support that might be required or be beneficial for the industry.

Consultation was through a mix of processes including

- Online survey
- One-on-one interviews with key stakeholders with grower-exporters and exporters, importers and retailers in current and potential export markets and other key industry stakeholders, such as research agencies.
- Feedback from industry meetings i.e. Export Forums and via direct communication.

## **10. Draft Export Strategy developed.**

Based on the completed review, analysis and consultation, a draft Export Strategy was developed for industry consultation. The Export Strategy articulates the overall export objectives of the industry based on prioritised markets. It incorporates suitable key strategy areas including:

Market Access and MRL Management – market access, maintenance and improvement strategies, MRL management strategy

Export Supply – quality, meeting market access protocols/ MRL requirements, packaging, traceability, food safety

Export Demand – market (trade) development, promotion

Capacity building – education for Australian growers and supply chain, education for importers, food service and retailers.

#### **11. Draft Export Strategy provided for industry consultation**

The draft Strategy was initially reviewed by the PRG and adjusted.

A copy was then be provided to all stakeholders who registered to participate in the consultation. Concurrently, all stakeholders were invited to participate in a short webinar to explain the Strategy, the rationale for different priorities and objectives, the opportunities, and challenges in front of the industry and the proposed strategies to address these. All feedback / commentary was considered, and appropriate changes incorporated into the final Strategy.

#### **12. Export Strategy finalised**

The Final Report and Export Strategy submitted to Hort Innovation

*Completed – Export Strategy provided in Appendix 5.*

## **Results and discussion**

The results of work undertaken is provided in the appendices, including:

1. Report card
2. Phytosanitary market access matrix (current as at 14 March, 2022).
3. International Market Analysis (Fresh Intelligence Consulting)
4. A White Paper (updated 25 May 2022)
5. The Avocado Export Strategy (2022-2026)

The following commentary is provided to highlight key issues that emerged through the Export Strategy development process:

1. The targets set in the Export Strategy are realistic and achievable, based on analysis undertaken.
2. Improved market access is critical to reach these targets outlined and is the highest priority for industry
3. Strategic MRL management is an important consideration for export development
4. Export Guidelines will assist the industry to focus on key requirements to meet export market requirements
5. The ability to consistently provide quality fruit to meet import country expectations is essential
6. Support is needed for growers to ensure they can easily and successfully engage with export supply chains
7. A targeted and well-funded Export Marketing and Promotion strategy is critical to support market development
8. Prices experienced over the last year are likely to be the 'new normal' over the next 5 years (noting that irregular bearing in Western Australia may cause some supply/price fluctuations from year to year). This situation will have impact on everything from production management through to market development and demand.

Overall, feedback from the PRG and registered stakeholders is that the Export Strategy meets the needs of the industry.

## Outputs

A summary of the project's outputs is provided in the Table 1 below.

**Table 1. Output summary**

Output	Description	Detail
Report Card	A report card providing an assessment of the progress of industry against the current Export Strategy (2019-2021) to understand the achievements, challenges, and emerging issues.	Internal use only. Provided as confidential appendix to this report.
Phytosanitary Matrix	This is a simple matrix showing the conditions of import that apply for Australian avocados to a range of countries.  Additional notes are also provided for the 3 protocol markets including Japan, New Zealand and Thailand.  Target audience: Internal use	Internal use only. Provided as confidential appendix to this report.  HIA may make this document available to industry stakeholders, with the caveat that it should be checked for currency in case any conditions of market entry have changed since original information was captured.  Stakeholders interested in accessing up-to-date information, can be directed to MiCOR. .
Situational Analysis	This report provides insight into the relationship between the expected supply and potential volumes directed to the domestic and export markets. Scenarios were developed which explore the potential impact on the domestic market under three different export volume targets.  Target audience: Internal use only - HIA and Avocados Australia to inform and assist decision making.	Internal document only – used to inform the Export Strategy.
International Market Analysis (Fresh Intelligence Consulting)	Analysis of 20 current and potential markets.  The information in this analysis includes country demographic information, avocado imports, import growth trends, reliance on imports and supply country – volume, value and seasonality. In addition, an assessment of the possible market share and volume available for Australian fruit by 2026, was derived.  Target audience: Registered key industry stakeholders including: growers, packers, exporters, researchers and government.  Total registered participants: 54	This Analysis was made available to all Australian parties who participated in one-on-one consultation and other registered industry stakeholders who requested a copy.
White Paper	The White Paper articulates current state of the industry, industry challenges and the opportunities for future export development that will likely present over the next five years.	Due to the commercial sensitivity of some information in the Export Strategy and accompanying documents, industry stakeholders were asked to register to be able

	<p>It provides realistic targets (volumes and pricing for specific countries) for the market development, which was presented as Market Demand / Feasibility Matrix.</p> <p>Target audience: Registered key industry stakeholders including: growers, packers, exporters, researchers and government registered to be part of the Export Strategy consultation.</p> <p>Total registered industry stakeholders to receive White Paper: 54</p>	<p>to access information through the consultation process. In total 54 people, across the range of stakeholder groups, registered to participate in consultation and received a copy of the White Paper.</p>
Export Forums	<p>Presentations at Export Forums.</p> <p>A series of four Export Forums, across the main production regions, were held between March 2022 and June 2022, as part of Project AV20004.</p> <p>Target audience: key industry stakeholders including growers, packers, exporters, researchers and government.</p> <p>Total attendees: 99 (across 4 Forums)</p>	<p>At each of these Forums, presentations about the development of the Export Strategy, and where appropriate the details of the Export Strategy were provided. Interested stakeholders were asked to register to be part of the consultation process and provide input/feedback as appropriate.</p>
Webinar	<p>Webinar</p> <p>A short webinar was held on 03.06.2022 to explain the draft Export Strategy and feedback process.</p> <p>Target audience: key industry stakeholders including: growers, packers, exporters, researchers and government registered to be part of the Export Strategy consultation</p> <p>Total attendees: 10</p>	<p>A short webinar was held on 03.06.2022. The webinar provided a short update on the details of the draft Export Strategy and invited participants to provide final feedback by 10.06.2022.</p>
Avo Connections	<p>Presentation to Avo Connections forum (as part of Hort Connections) on 06.06.2022.</p> <p>Target audience: key industry stakeholders including growers, packers, exporters, researchers and government.</p> <p>Total attendees: 145</p>	<p>A summary of the Export Strategy was provided at Avo Connections. Participants were invited to provide final feedback on the Strategy by 10.06.2022.</p>

## Outcomes

A summary of the project's outcomes are provided below:

**Table 2. Outcome summary**

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
<p>A clear Export Strategy for the industry to focus its efforts in regard to export development activities to achieve the stated outcomes/ targets.</p>	<p>Fund: Avocado Fund</p> <p>SIP: Avocado Strategic Investment Plan 2022-2026</p> <p>Strategy: Demand creation:</p> <p>Key sub-strategy: Develop a strategic plan for market access and trade development opportunities</p> <p>KPIs:</p> <ul style="list-style-type: none"> <li>- Development of a market access and trade development program</li> <li>- Development of an export marketing strategy</li> <li>- Evidence-based market access protocols are prioritised on national benefit</li> </ul> <p>There are also several other sub-strategies and KPI's in the Avocado Strategic Investment Plan that align to the key sub-strategy above.</p>	<p>The Export Strategy will be realised by all stakeholders (Hort Innovation, Avocados Australia, exporters, growers, research agencies and government) working together to create the environment where conditions are achieved that facilitate the export of Australian avocados at sustainable pricing.</p>	<p>Evidence will be collected as the Export Strategy is implemented over the next five years</p>

## Monitoring and evaluation

Table 2. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
1. To what extent has the project achieved its expected outcomes?	The Export Strategy provides a clear pathway to potentially reach 20,000+ tonne / annum export by 2026 at sustainable pricing. It is however dependent on market access targets being achieved.	Hort Innovation and Avocados Australia should monitor progress against targets provided.
2. How relevant was the project to the needs of intended beneficiaries?	The Export Strategy has met the needs of intended beneficiaries in that it provides a pathway and targets based on sound analysis. This will assist in directing the industry over the next 5 years, as well as assisting individual businesses in decision making.	Continue to communicate the Export Strategy to industry stakeholders, focusing on targets and practice change required to meet / support these targets. Review annually or as required if there are substantive changes in the trading environment.
3. How well have intended beneficiaries been engaged in the project?	Level of engagement with all key stakeholder groups was very good. Export development over the next 5 years is a high priority for the sector given current market conditions.  Regular updates have been provided through the industry communications program and direct engagement with registered stakeholders.	The registered stakeholder group could be used for future consultation in regard to any matters to do with the review / updating of the Export Strategy.
4. To what extent were engagement processes appropriate to the target audience/s of the project?	Given the need to maintain some discretion in distribution of project documentation, access to consultation process for Australian export stakeholders was relatively easy and open.  There was substantial communication and engagement activities to inform and engage with industry in relation to the development of the Export Plan through the industry communications program and direct engagement with registered stakeholders.	The approach taken was sound, and could be repeated for future similar activities.
5. What efforts did the project make to improve efficiency?	The project was well managed and efficient in that it was able to leverage the capacity of Avocados Australia and the existing export development project (AV20004)	Any future issues related to the Export Strategy should be facilitated through Hort Innovation project AV20004 and Avocados Australia.

## Recommendations

It is recommended that:

- Hort Innovation and Avocados Australia adopt and operationalize the Avocado Export Strategy 2022-2026, including addressing the R&D requirements for the Australian avocado industry to achieve its objectives.
- the Export Strategy be reviewed on an annual basis or if there are significant changes in the trading environment, to ensure that the Objectives and Strategies continue to be appropriate.

## Refereed scientific publications

Not applicable.

## Intellectual property

No project IP or commercialisation to report.

## Acknowledgements

Avocados Australia would like to acknowledge the following parties that contributed to this project:

Project Reference Group:

- Ms Sophie Cremasco, The Avocado Collective
- Mr Cormac te Kloot, Costa Group
- Mr Joe Lyons, Joe Lyons, Lyons Farming & Chair– Bundaberg Fruit & Veg Growers
- Antony Allen, The Avolution
- Joe Saina, Chair – AS Barr & Chair -Australian Horticultural Exporters & Importers Association (AHEIA)
- Ms Mimi Doan, Hort Innovation

(John Tyas, Flora Zhang and Jenny Margetts also form part of the PRG.)

All parties that contributed to the consultation to help develop the Export Strategy, including:

- Mr Lachlan Donovan, Donovan Family Trust
- Mr Nick Gill, Fresh Country Farms
- Mr Josh Franceschi and Ms Sophie Cremasco, The Avocado Collective
- Mr Antony Allen, The Avolution
- Mr Cormac te Kloot and Mr Daniel Green, Costa Group
- Mr Russell Delroy and Mr Ben Walker, Delroy Orchards
- Mr Shanon Williams, AustOn Corporation
- Mr Daryl Boardman, Avocados Australia Director

And international importers and retailers consulted.

## Appendices

Note: The Appendix below are available to qualified parties on request from Hort Innovation.

1. Report card
2. Phytosanitary market access matrix (current as at 14 March, 2022).
3. International Market Analysis (Fresh Intelligence Consulting)
4. A White Paper (updated 25 May 2022)
5. The Avocado Export Strategy (2022-2026)