



Facts at a Glance **2021/22** for the Australian avocado industry

Key statistics of the Australian avocado industry
Data current at September 2022



**Hort
Innovation**
Strategic levy investment

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Avocados Australia

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

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

General enquiries: admin@avocado.org.au

Media enquiries: co@avocado.org.au

Online

www.avocado.org.au

www.facebook.com/AvocadosAustralia

<https://twitter.com/AvocadosAu>

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Report notes

Export values are calculated using Free on Board (FOB) price.

Gross Value of Production (GVP) for annual Australian avocado production is estimated by combining: local wholesale value of fresh volume; local wholesale value of processing volume; and export value (FOB) of exported volume.

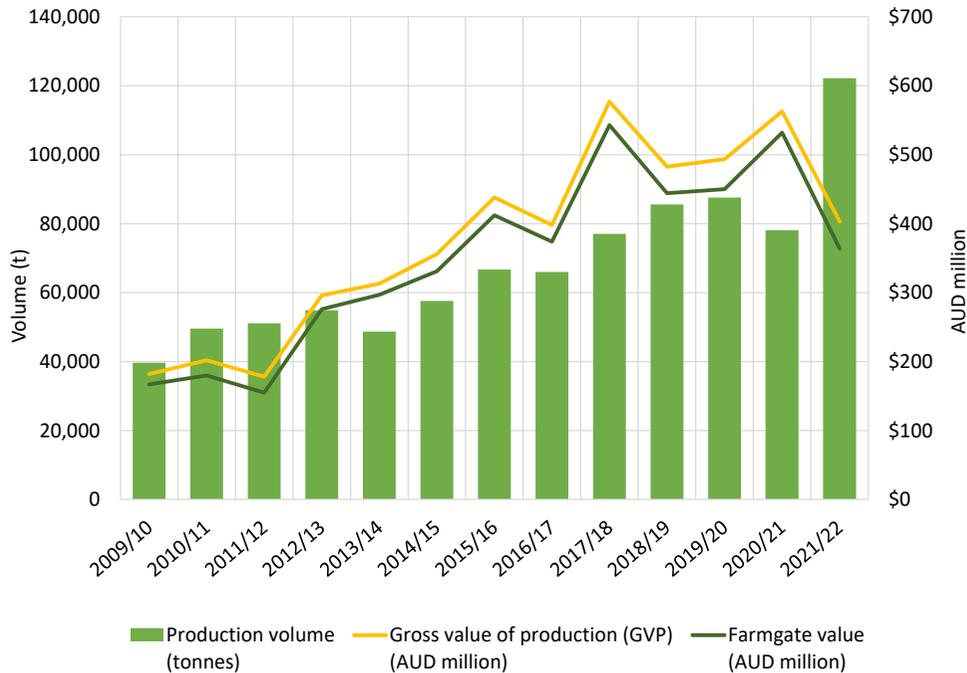
Consumer market value is estimated using average retail prices (Coles and Woolworths online price data) multiplied by Australian avocado volumes (fresh and processed) that are supplied to the Australian consumer market. The consumer market is broadly defined as both retail and foodservice channels.

Farmgate value is estimated by multiplying the Australian avocado production volume by the local wholesale price minus estimated marketing/supply chain costs.

Australian consumption is estimated using total volume supplied to the Australian market divided by Australian population (based on ABS data).

Data source is Infocado unless otherwise stated. Infocado is the data collection platform from which avocado supply and forecast volumes are reported. The production of these reports is currently funded through AV20000. See <http://www.avocado.org.au/our-programs/supply-chain-data/infocado/> for more information.

Avocado production and value

Australian annual avocado production and value


Australia produced just over 122,197 tonnes of avocados in 2021/22, which was 56% more than the previous year. The gross value of production (GVP) for Australian avocados was estimated at \$403 million.

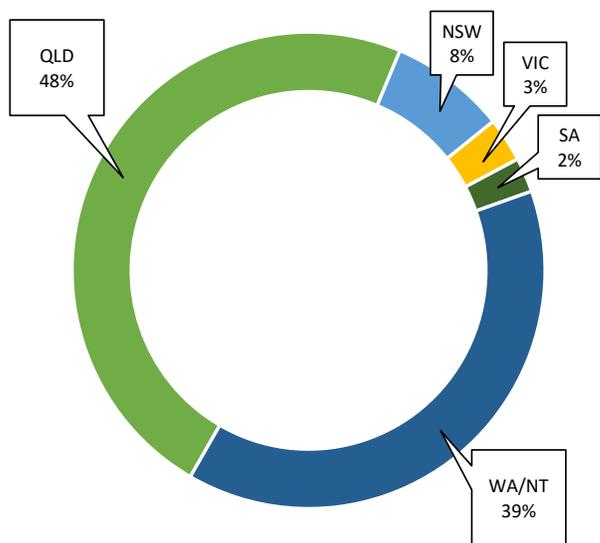
Australian avocado production

| Year | Production volume (tonnes) | Number of 5.5kg trays | Gross value of production (GVP) (AUD million) | Farmgate value (AUD million) | Consumer market value of Australian fruit sold domestically (AUD million) | Export value (AUD million) |
|---------|----------------------------|-----------------------|---|------------------------------|---|----------------------------|
| 2012/13 | 54,877 | 9,977,567 | \$ 296 | \$ 276 | \$ 661 | \$ 8.1 |
| 2013/14 | 48,715 | 8,857,217 | \$ 313 | \$ 297 | \$ 668 | \$ 5.6 |
| 2014/15 | 57,595 | 10,471,887 | \$ 356 | \$ 331 | \$ 750 | \$ 6.4 |
| 2015/16 | 66,716 | 12,130,207 | \$ 438 | \$ 412 | \$ 899 | \$ 9.2 |
| 2016/17 | 65,992 | 11,998,467 | \$ 398 | \$ 374 | \$ 755 | \$ 12.5 |
| 2017/18 | 77,032 | 14,005,754 | \$ 557 | \$ 543 | \$ 958 | \$ 11.6 |
| 2018/19 | 85,546 | 15,553,808 | \$ 483 | \$ 444 | \$ 898 | \$19.6 |
| 2019/20 | 87,546 | 15,917,477 | \$ 493 | \$ 450 | \$ 845 | \$25.0 |
| 2020/21 | 78,085 | 14,197,276 | \$ 563 | \$ 532 | \$ 861 | \$22.0 |
| 2021/22 | 122,197 | 22,217,709 | \$ 403 | \$ 364 | \$ 666 | \$52.0 |

Sources: Infocado, IHS Global Trade Atlas, and Avocados Australia analysis using Ausmarket Consultants data and Freshlogic assumptions

Avocado production by state

Avocado production by state
2021-22



Queensland continues to produce the majority of Australian avocados, with 48% of production. Western Australia produced the next largest share at 39%.

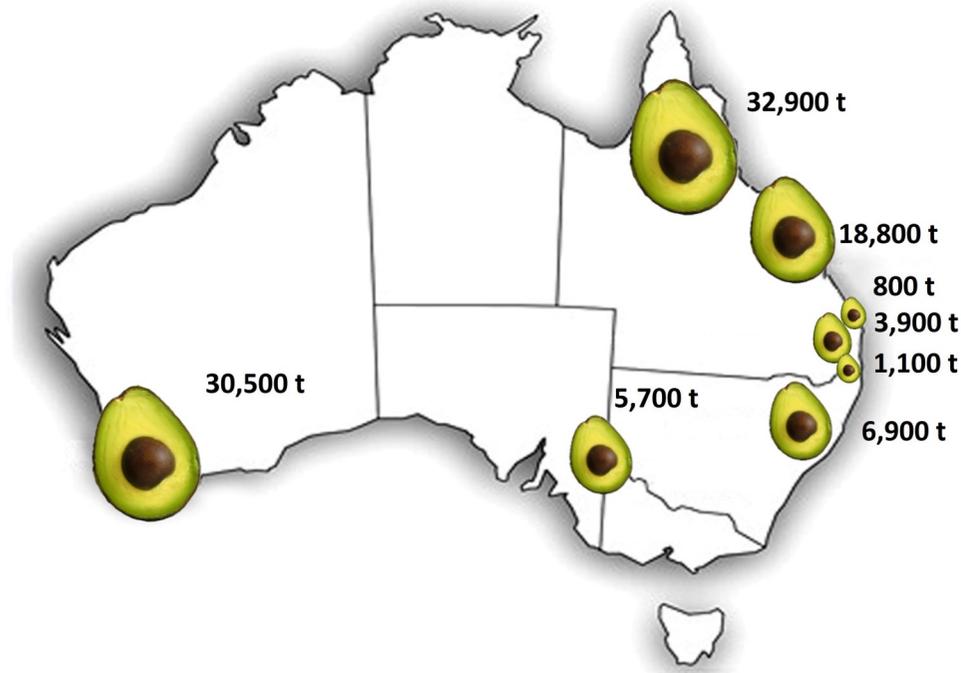
Avocado production by state (tonnes)

| Year | Qld | NSW | Vic/Tas | SA | WA/NT | Total |
|----------------|--------|-------|---------|-------|--------|----------------|
| 2012/13 | 30,195 | 3,373 | 303 | 2,431 | 18,575 | 54,877 |
| 2013/14 | 33,925 | 5,801 | 1,348 | 1,479 | 6,163 | 48,715 |
| 2014/15 | 28,010 | 4,666 | 1,699 | 1,396 | 21,824 | 57,595 |
| 2015/16 | 32,875 | 6,693 | 1,524 | 1,853 | 23,771 | 66,716 |
| 2016/17 | 42,039 | 6,980 | 1,881 | 1,608 | 13,483 | 65,992 |
| 2017/18 | 45,170 | 7,791 | 2,579 | 1,312 | 20,180 | 77,032 |
| 2018/19 | 47,999 | 9,773 | 538 | 1,618 | 25,617 | 85,546 |
| 2019/20 | 43,067 | 6,589 | 2,209 | 2,442 | 33,239 | 87,546 |
| 2020/21 | 53,987 | 8,185 | 1,028 | 1,338 | 13,547 | 78,085 |
| 2021/22 | 58,640 | 9,694 | 2,866 | 3,683 | 47,316 | 122,197 |

Source: Infocado

Avocado regions in Australia

Annual tonnes produced in each region averaged over two years*: 2020/21 and 2021/22



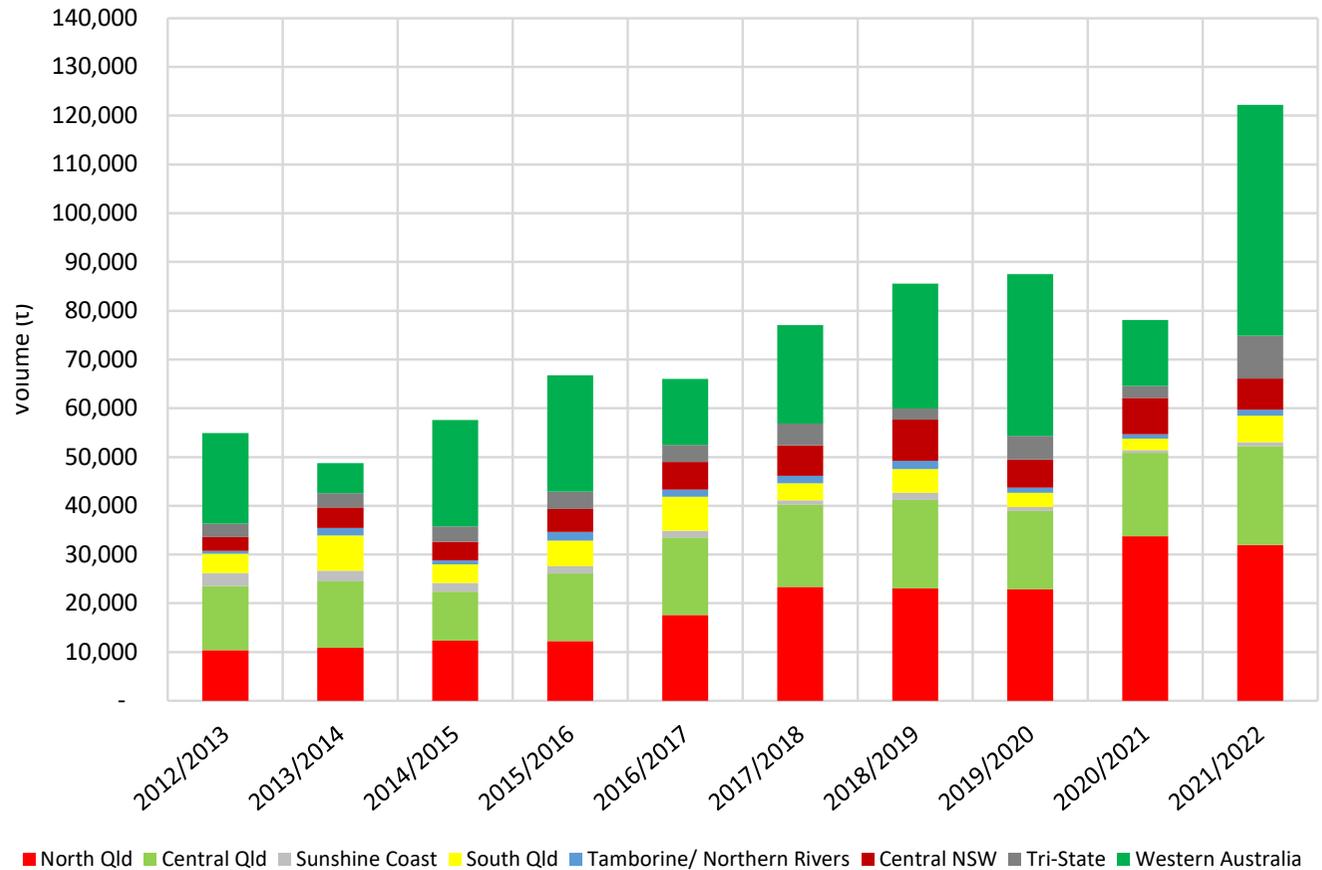
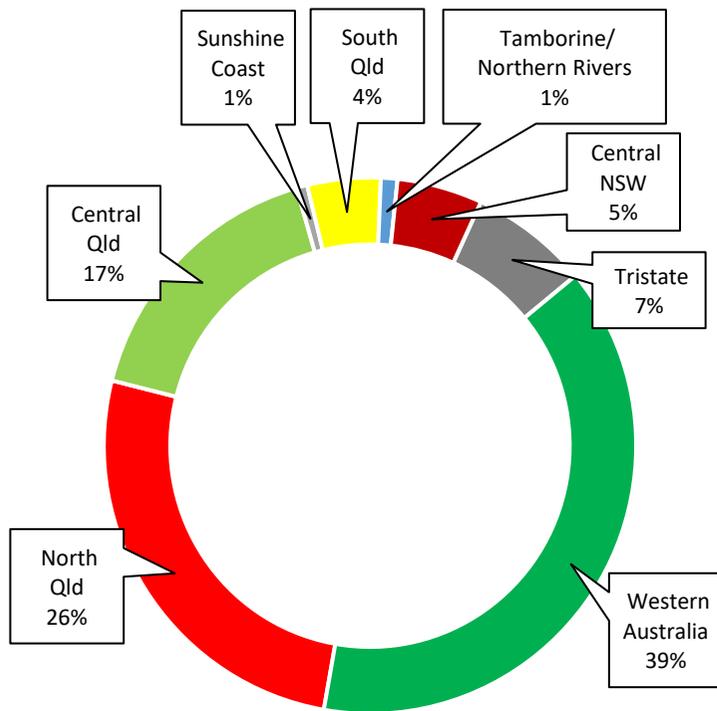
* A two-year average is used to compare production by region, because some regions have irregular bearing years, meaning crop load may vary significantly from year to year.

| State/s | Region |
|---|--|
| Queensland | North Queensland (NQ) |
| | Central Queensland (CQ) |
| | Sunshine Coast (SC) |
| | South Queensland (SQ) |
| Queensland & New South Wales | Tamborine / Northern Rivers (TNR) |
| New South Wales | Central New South Wales (CNSW) |
| New South Wales, Victoria, South Australia & Tasmania | Tristate (Tri) |
| Western Australia & Northern Territory | Western Australia & Northern Territory (WA/NT) |

Australia's avocado production is divided into regions which have similar growing conditions and seasons. Some regions cross state boundaries. On average across 2020/21 and 2021/22, production has mostly come from the Queensland regions (59%) and Western Australia (28%).

Avocado production by region

Avocado production by region 2021/2022



Source: Infocado

Avocado production by region

44,112 additional trays of avocados were produced in FY2021-22, a 56% increase over the volume produced the previous financial year.

Western Australia accounted for 77% of the total increase.

| Australian avocado production by growing region (tonnes) | | | | | | | | | |
|--|-----------|-------------|----------------|-----------|---------------------------|-------------|----------|-------------------|----------------|
| Year | North Qld | Central Qld | Sunshine Coast | South Qld | Tamborine Northern Rivers | Central NSW | Tristate | Western Australia | Total |
| 2012/13 | 10,399 | 13,164 | 2,603 | 4,027 | 533 | 2,843 | 2,734 | 18,575 | 54,877 |
| 2013/14 | 10,859 | 13,668 | 2,131 | 7,243 | 1,586 | 4,208 | 2,857 | 6,163 | 48,715 |
| 2014/15 | 12,310 | 10,054 | 1,782 | 3,848 | 781 | 3,815 | 3,182 | 21,824 | 57,595 |
| 2015/16 | 12,285 | 13,857 | 1,421 | 5,301 | 1,737 | 4,752 | 3,592 | 23,771 | 66,716 |
| 2016/17 | 17,599 | 15,882 | 1,401 | 6,964 | 1,500 | 5,645 | 3,517 | 13,483 | 65,992 |
| 2017/18 | 23,346 | 16,851 | 927 | 3,470 | 1,548 | 6,260 | 4,450 | 20,180 | 77,032 |
| 2018/19 | 23,023 | 18,216 | 1,389 | 4,877 | 1,722 | 8,408 | 2,294 | 25,617 | 85,546 |
| 2019/20 | 22,902 | 16,049 | 778 | 2,929 | 1,071 | 5,748 | 4,830 | 33,239 | 87,546 |
| 2020/21 | 33,716 | 17,100 | 641 | 2,296 | 931 | 7,453 | 2,399 | 13,547 | 78,085 |
| 2021/22 | 31,933 | 20,331 | 804 | 5,433 | 1,229 | 6,347 | 8,805 | 47,316 | 122,197 |
| 2021/22 % by region | 26% | 17% | 1% | 4% | 1% | 5% | 7% | 39% | |
| Past 2yr average % by region | 33% | 19% | 1% | 4% | 1% | 7% | 6% | 30% | |

Source: Infocado

Avocado supply periods by region

Australian avocado supply periods by region and variety

| Region | Variety | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---------------------------|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| North Queensland | Hass | | | | ■ | ■ | ■ | | | | | | |
| | Shepard | | ■ | ■ | ■ | | | | | | | | |
| Central Queensland | Hass | | | | ■ | ■ | ■ | ■ | ■ | | | | |
| | Shepard | | | ■ | ■ | | | | | | | | |
| Sunshine Coast | Hass | | | | | ■ | ■ | ■ | ■ | ■ | | | |
| South Queensland | Hass | | | | | ■ | ■ | ■ | ■ | ■ | ■ | ■ | |
| Tamborine/Northern Rivers | Hass | | | | | | ■ | ■ | ■ | ■ | ■ | | |
| Central New South Wales | Hass | | | | | ■ | ■ | ■ | ■ | ■ | ■ | | |
| Tristate | Hass | ■ | | | | | | | ■ | ■ | ■ | ■ | ■ |
| Western Australia | Hass | ■ | ■ | ■ | | | | ■ | ■ | ■ | ■ | ■ | ■ |
| New Zealand | Hass | ■ | ■ | ■ | | | | ■ | ■ | ■ | ■ | ■ | ■ |



Hass Avocado



Shepard Avocado

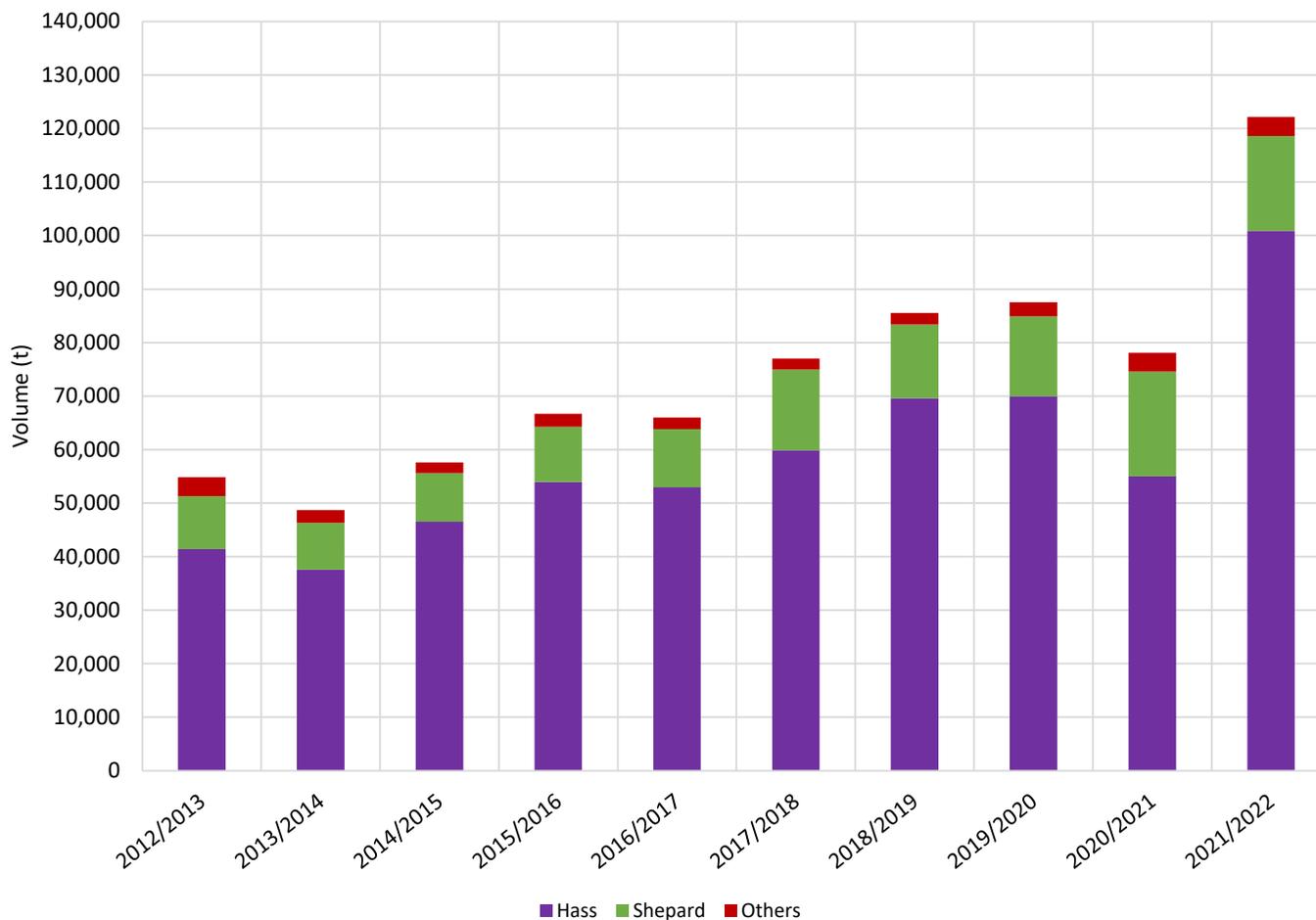
Avocado production by variety

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

Hass is the main avocado variety, and is produced almost all year round. In 2021/22 Hass represented 83% of production.

Shepard, which is harvested in Queensland through late Summer and Autumn, made up 14% of total production, and at that time of year, is the dominant Australian variety on the market.

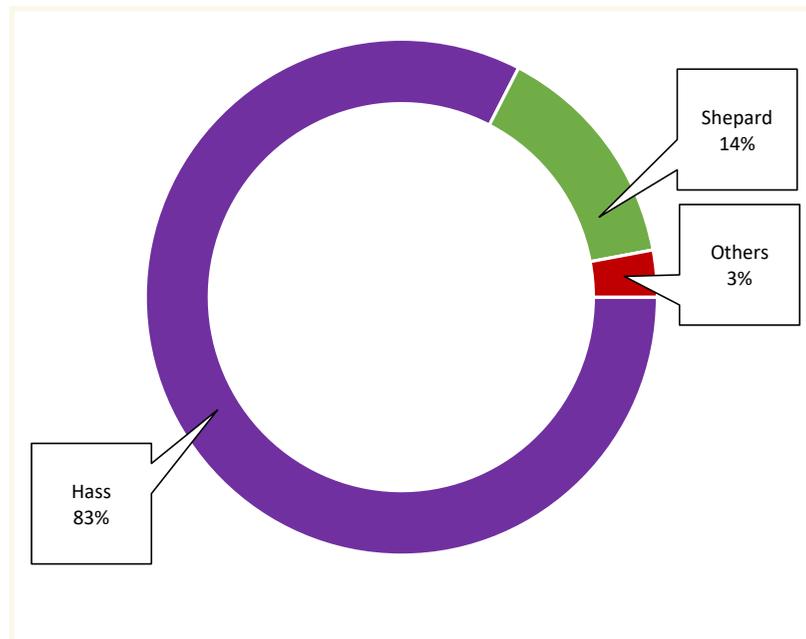
Australian annual avocado production volume (tonnes) by variety



Source: Infocado

Avocado production by variety

Australia's avocado production by variety in 2021/22



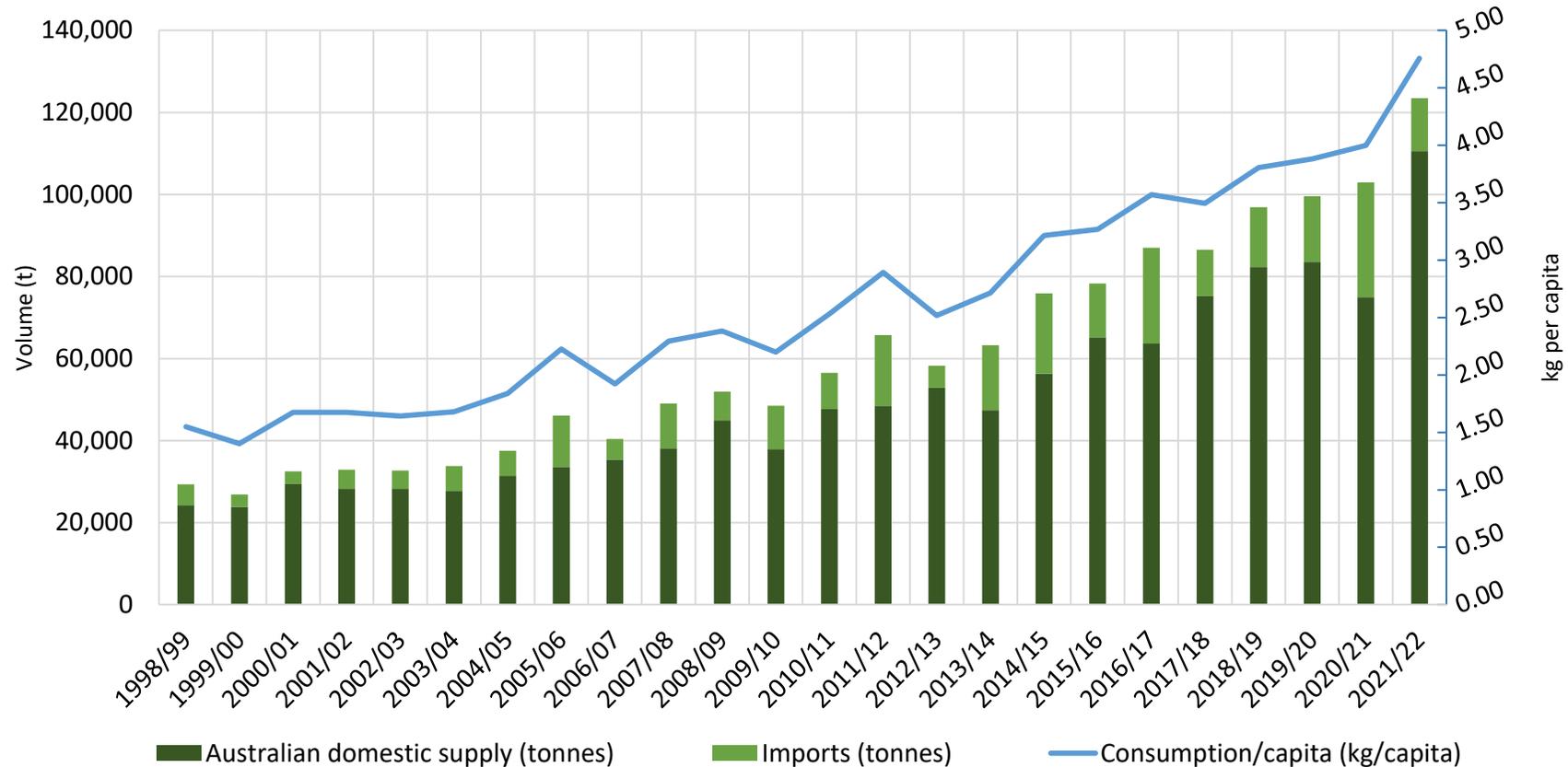
The 3% of fruit which is not Hass or Shepard is made up of varieties including: Maluma, Reed, Carmen, Lamb, Wurtz, Gem, Fuerte, Turner, Sharwil, Gwen, Edrinol, Pinkerton, Zutano, Bacon, Ryan, Ettinger, Sir Prize, Hazzard, Rincon, Llanos, Santana, Linda, Anaheim, Nabal.

| Production by Variety (tonnes) | | | | |
|--------------------------------|---------|---------|-------|----------------|
| Year | Hass | Shepard | Other | Total |
| 2012/13 | 41,398 | 9,923 | 3,556 | 54,877 |
| 2013/14 | 37,578 | 8,774 | 2,363 | 48,715 |
| 2014/15 | 46,540 | 9,090 | 1,966 | 57,595 |
| 2015/16 | 53,965 | 10,281 | 2,470 | 66,716 |
| 2016/17 | 52,962 | 10,860 | 2,169 | 65,992 |
| 2017/18 | 59,870 | 15,085 | 2,077 | 77,032 |
| 2018/19 | 69,612 | 13,775 | 2,160 | 85,546 |
| 2019/20 | 70,016 | 14,875 | 2,655 | 87,546 |
| 2020/21 | 55,025 | 19,540 | 3,521 | 78,085 |
| 2021/22 | 100,904 | 17,709 | 3,585 | 122,197 |

Source: Infocado

Domestic avocado consumption

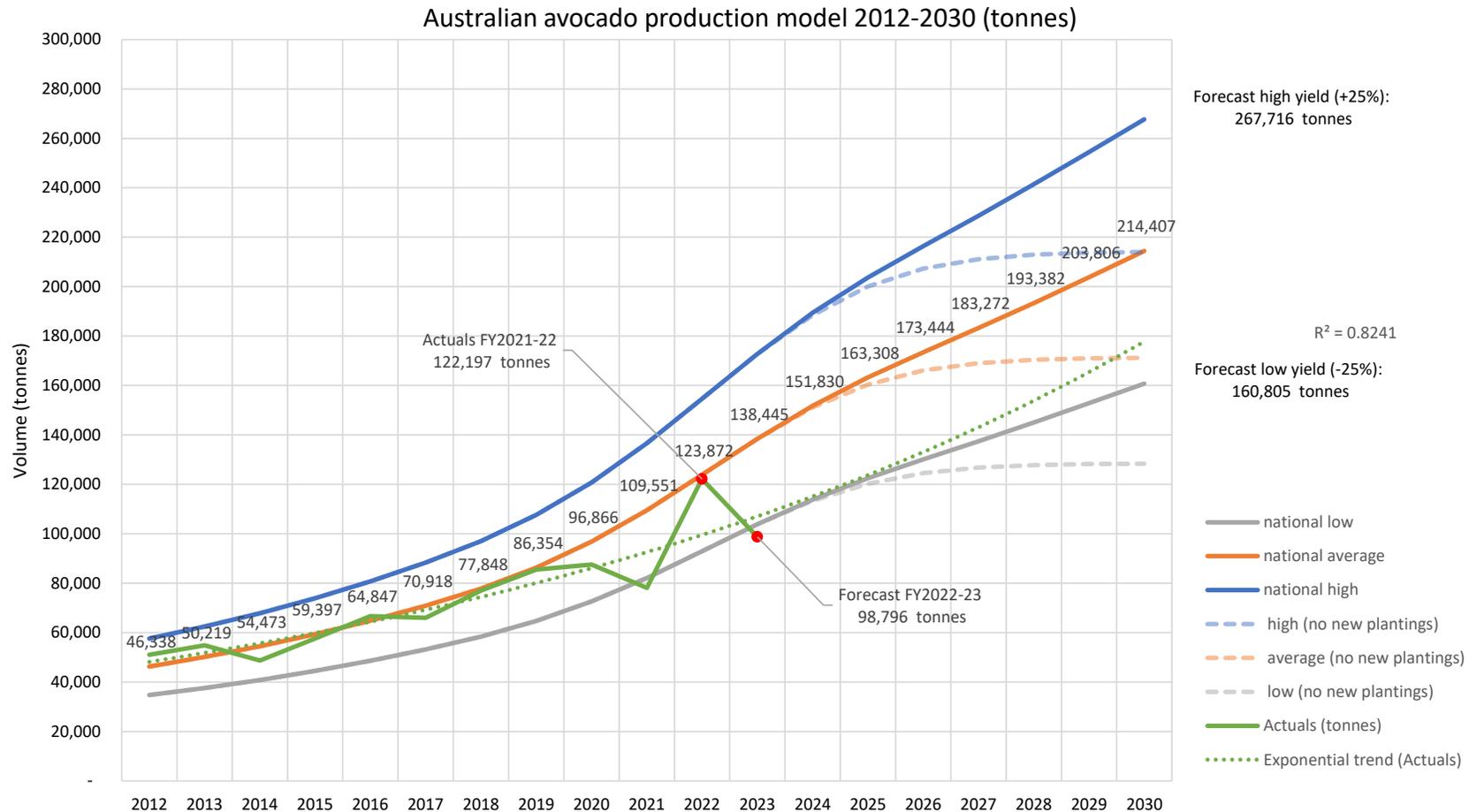
Australian annual domestic avocado supply, NZ imports and Australian per capita consumption



Sources: Infocado, IHS Global Trade Atlas (2021) and population based on ABS data

Australia avocado consumption in 2021/22 was 4.76 kg per person. Imported New Zealand fruit supplements Australian supply during their harvest season during Spring and Summer.

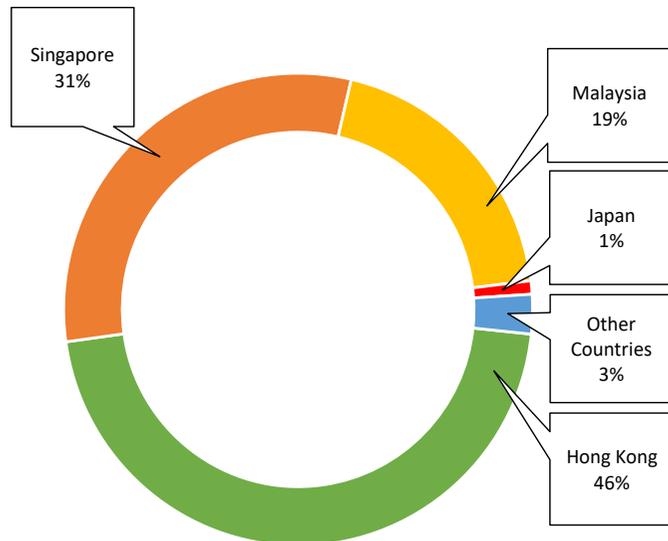
Australian avocado production



Australian production is forecast to increase strongly over the next few years, to an average of around 170,000 tonnes per annum expected to be produced by 2026. *Source: Infocado, Avocados Australia analysis .*

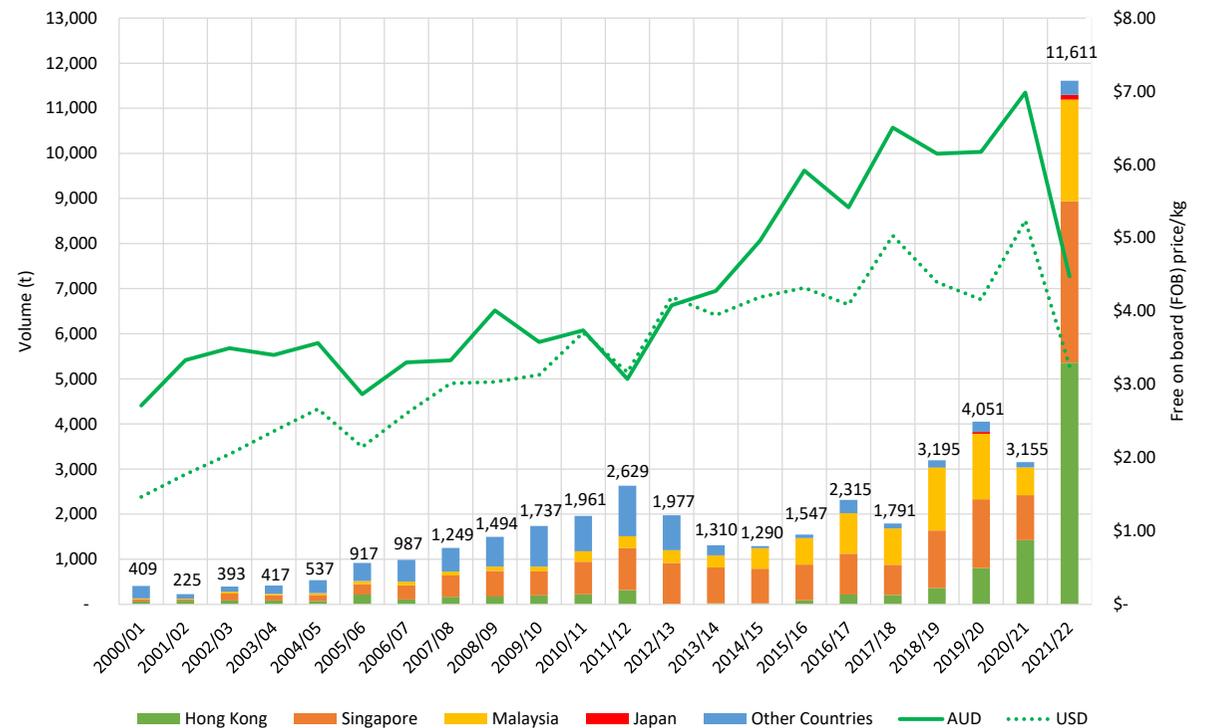
Australian avocado export markets

Australia's export markets in 2021/22



Source: IHS Global Trade Atlas (2022)

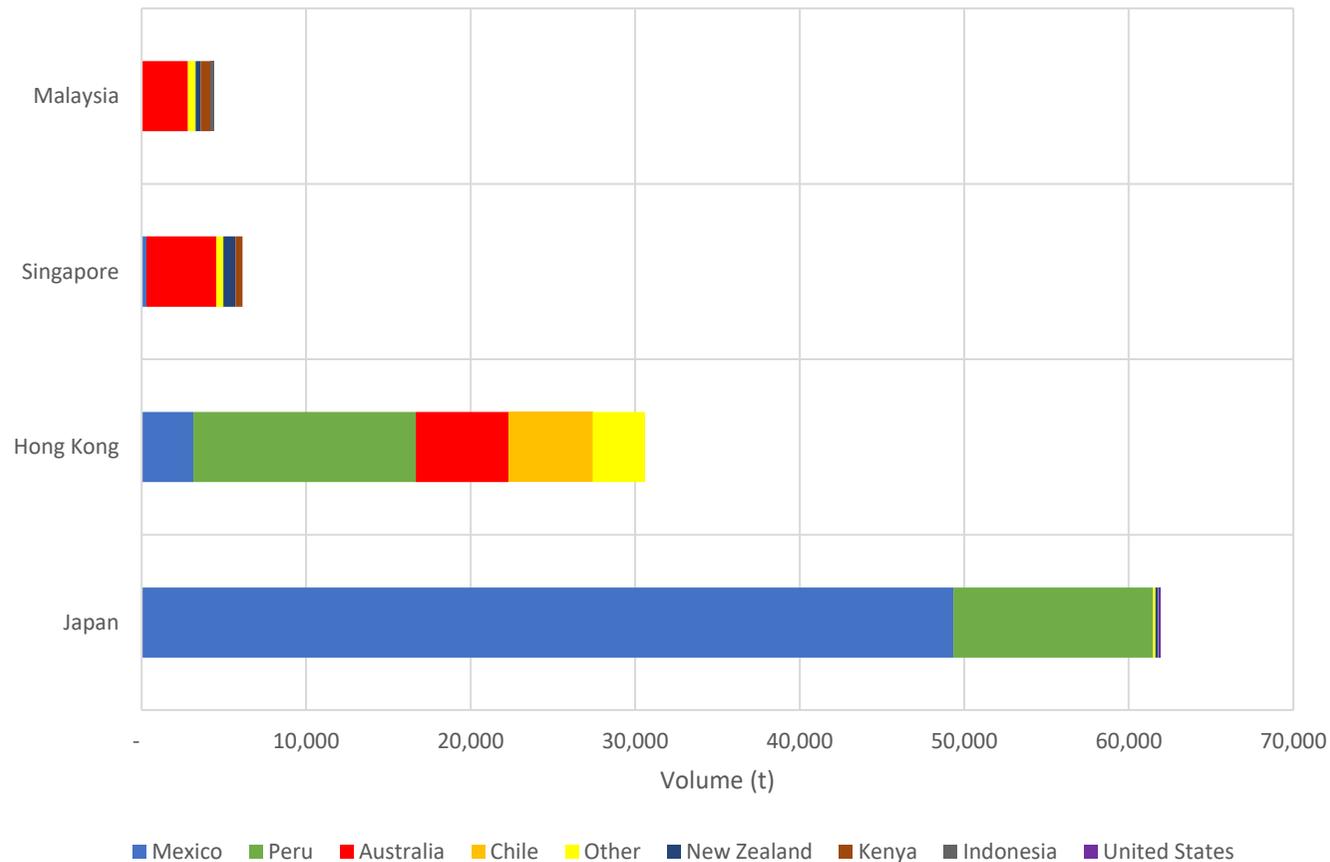
Australian annual avocado export volumes in tonnes by country and AU\$/Kg FOB



In both production and exports, Australia is currently a small player in the world avocado market. Ongoing activity is underway targeting Australia's growth in export markets. In 2021/22 Australia exported 11,626 tonnes, representing an increase of 268% over the previous financial year, and 9.50% of the total 122,197 tonnes produced in Australia.

Australian avocado export markets

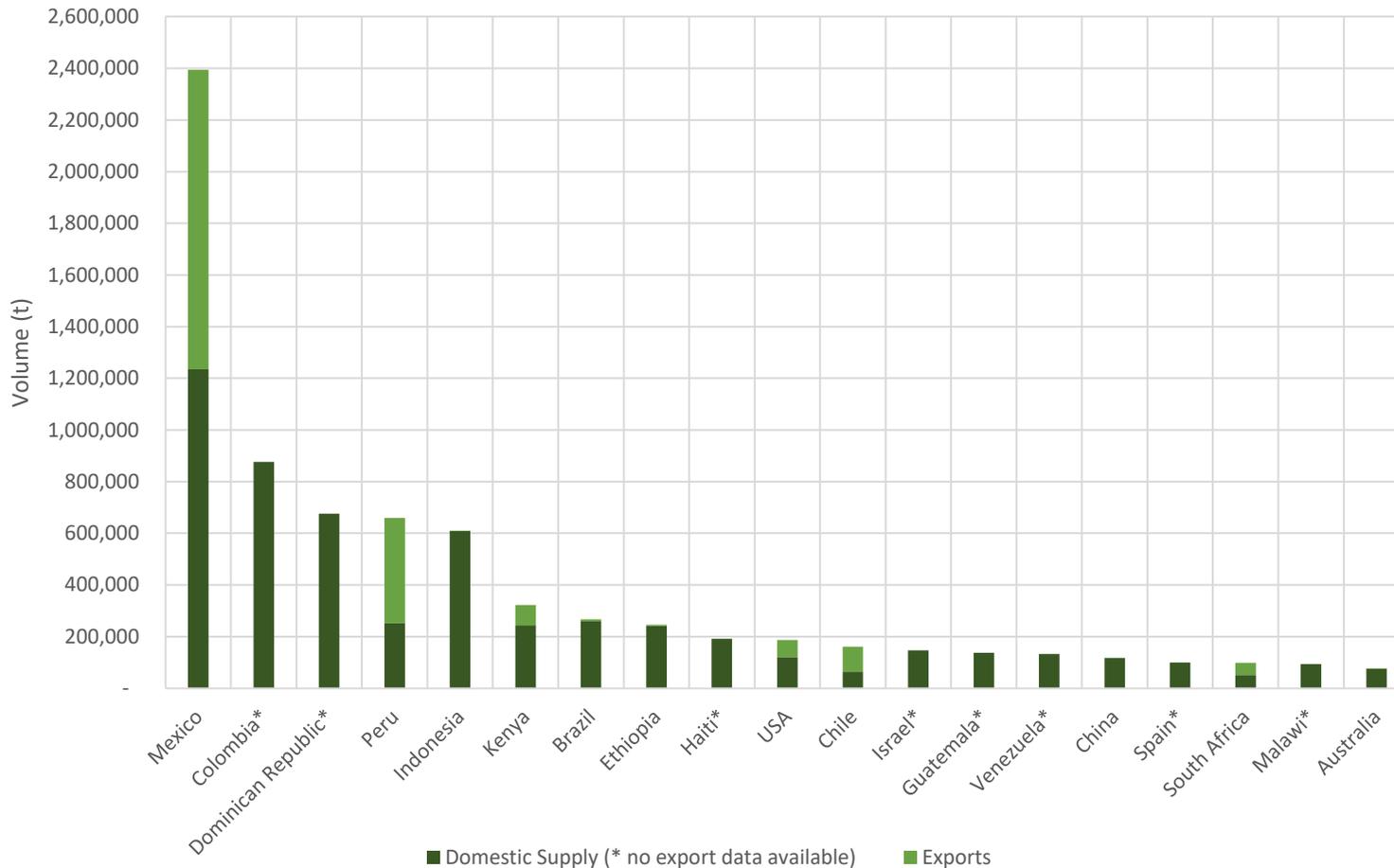
Annual imported volumes by country of origin for the 4 main Australian overseas markets



Source: IHS Global Trade Atlas (2022)

Top 20 largest global producers

Avocado production and export volumes for the top 20 countries (calendar year 2020)



Source: IHS Global Trade Atlas and FAOSTAT (2022)