



# Facts at a Glance 2017/18

## for the Australian avocado industry

Key statistics of the Australian avocado industry  
*Data current at August 2018*



**Hort  
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AVOCADO  
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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.

**Data source** is Infocado unless otherwise stated. Infocado is the data collection platform from which avocado supply and forecast volumes are reported. The production of these reports is currently funded through AV16006. See <http://www.avocado.org.au/our-programs/supply-chain-data/infocado/> for more information.

**Consumption** is estimated using total supply volume divided by Australian population (based on ABS data).

**Report version updated** 9 October 2018

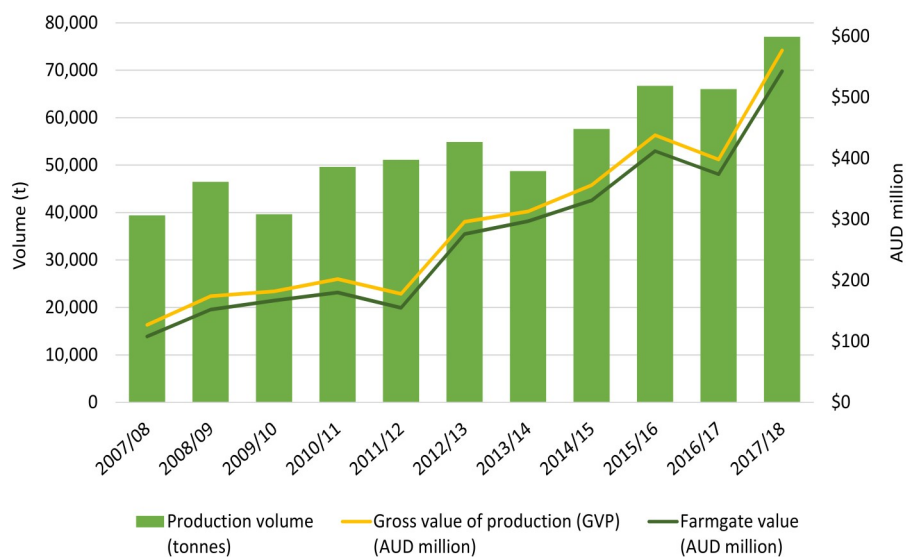
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This report has been produced as part of the strategic levy investment project *Avocado industry market data capture and analysis* (AV16006), part of the Hort Innovation Avocado Fund. It is funded by Hort Innovation, using the avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

# Avocado production and value

Australian annual avocado production and value



Sources: Infocado; AusMarket Consultants; Freshlogic; IHS Global Trade Atlas (2018)

**Australia produced just over 77,000 tonnes of avocados in 2017/18, which was 17% more than the previous year. The gross value of production (GVP) for Australian avocados was estimated at \$557 million.**

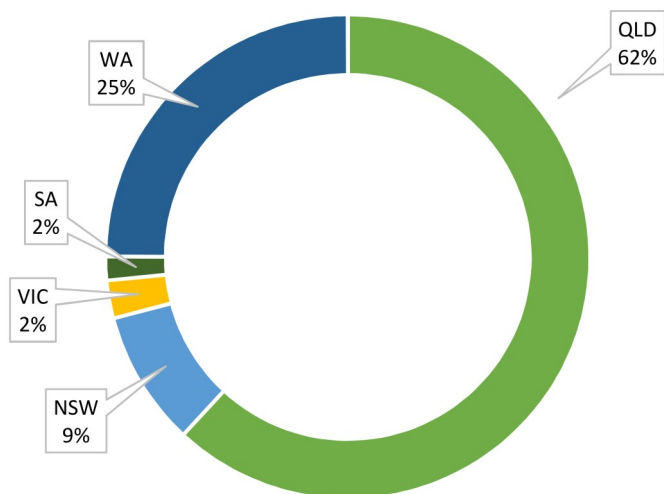
Australian avocado production

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)
2007/08	39,394	7,162,546	\$ 127	\$ 108	\$ 326	\$ 4.2
2008/09	46,446	8,444,728	\$ 174	\$ 152	\$ 462	\$ 6.0
2009/10	39,641	7,207,501	\$ 182	\$ 167	\$ 426	\$ 6.2
2010/11	49,612	9,020,281	\$ 202	\$ 180	\$ 498	\$ 7.3
2011/12	51,113	9,293,315	\$ 178	\$ 155	\$ 461	\$ 8.1
2012/13	54,877	9,977,567	\$ 296	\$ 276	\$ 661	\$ 8.1
2013/14	48,715	8,857,217	\$ 313	\$ 297	\$ 668	\$ 5.6
2014/15	57,595	10,471,887	\$ 356	\$ 331	\$ 750	\$ 6.4
2015/16	66,716	12,130,207	\$ 438	\$ 412	\$ 899	\$ 9.2
2016/17	65,992	11,998,467	\$ 398	\$ 374	\$ 755	\$ 12.5
2017/18	77,032	14,005,754	\$ 557	\$ 543	\$ 958	\$ 11.6

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 2017/2018



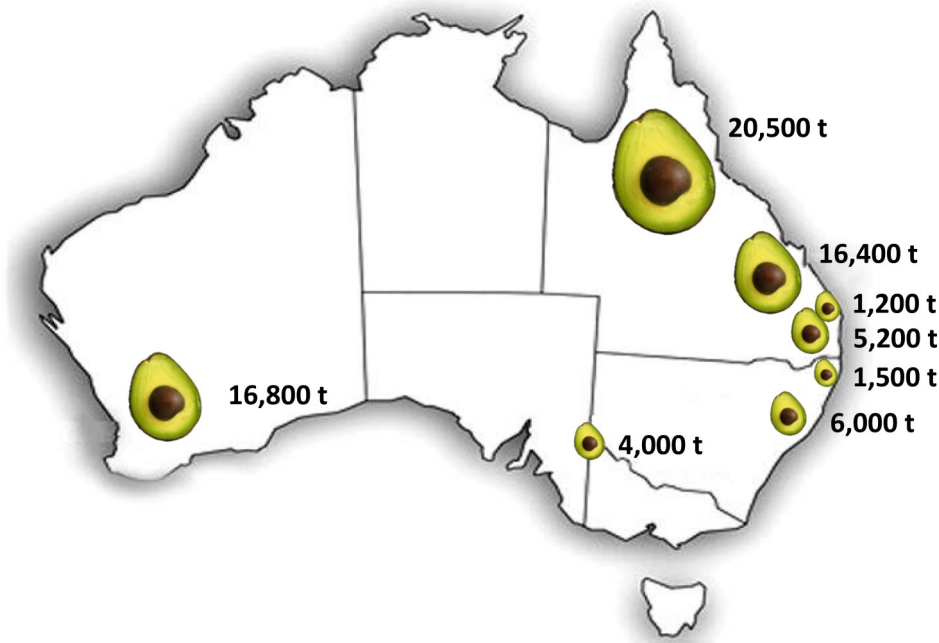
Queensland continues to produce the majority of Australian avocados, with 62% of production. Western Australia produced the next largest share at 25%.

Avocado production by state (tonnes)

Year	Qld	NSW	Vic/Tas	SA	WA/NT	Total
<b>2007/08</b>	31,416	4,385	55	484	3,053	<b>39,394</b>
<b>2008/09</b>	33,179	5,456	120	248	7,443	<b>46,446</b>
<b>2009/10</b>	32,484	3,203	62	167	3,724	<b>39,641</b>
<b>2010/11</b>	40,654	4,009	77	210	4,661	<b>49,612</b>
<b>2011/12</b>	40,665	4,012	186	1,931	4,319	<b>51,113</b>
<b>2012/13</b>	29,294	3,116	119	956	21,392	<b>54,877</b>
<b>2013/14</b>	35,602	5,601	770	719	6,024	<b>48,715</b>
<b>2014/15</b>	28,703	4,286	1,106	913	22,587	<b>57,595</b>
<b>2015/16</b>	32,374	8,305	1,646	1,429	22,961	<b>66,716</b>
<b>2016/17</b>	45,608	6,108	1,296	1,105	11,875	<b>65,992</b>
<b>2017/18</b>	47,669	6,964	1,947	1,215	19,236	<b>77,032</b>

# Avocado regions in Australia

Annual tonnes produced in each region averaged over two years\*: 2016/17 and 2017/18



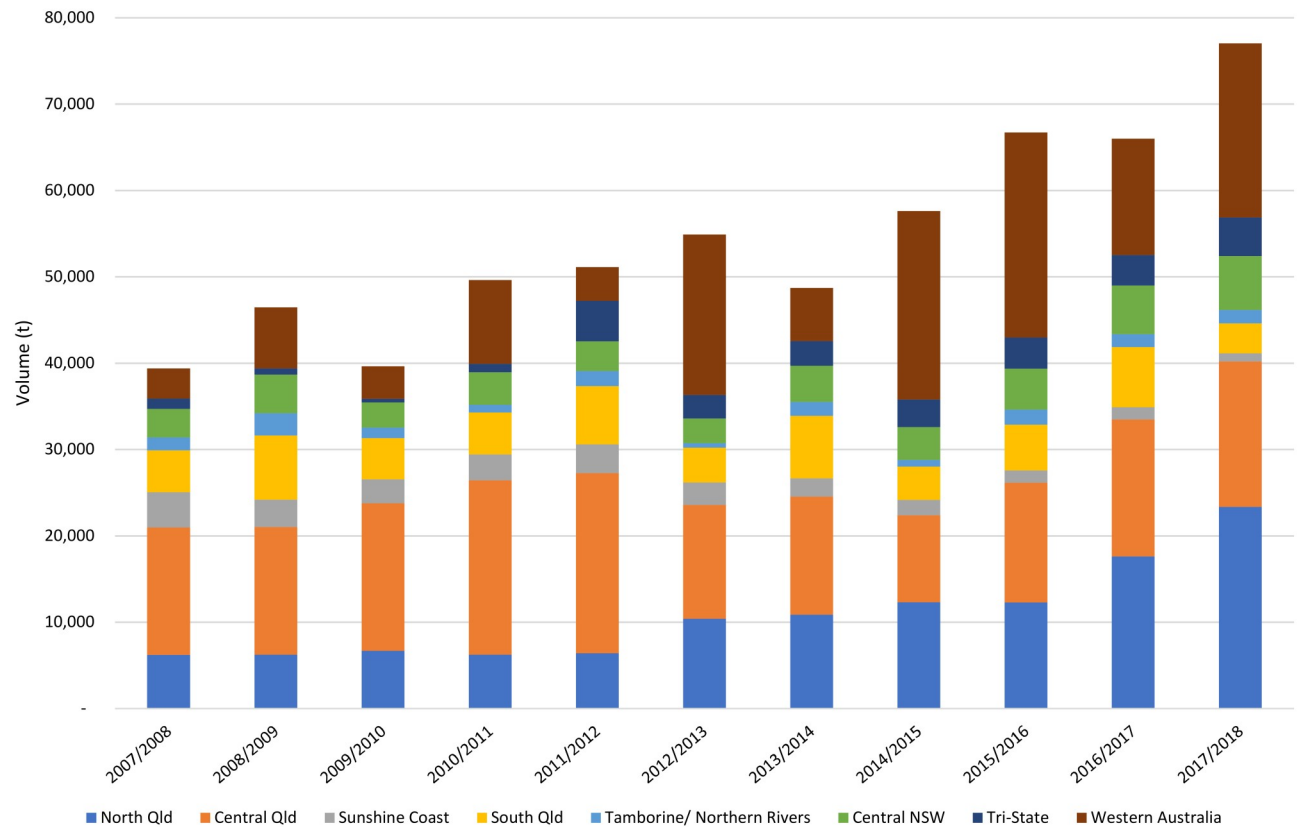
\* A two-year average is used to compare production by region, because some regions have irregular bearing years, meaning crop load may vary significantly from year to year.

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)

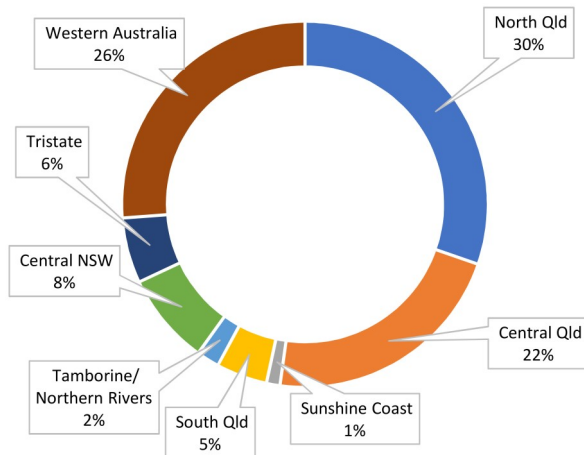
Australia's avocado production is divided into regions which have similar growing conditions and seasons. Some regions cross state boundaries. On average across 2016/17 and 2017/18, production has mostly come from the Queensland regions (62%) and Western Australia (25%).

# Avocado production by region

Australian annual avocado production by region



Avocado production by region 2017/2018



# Avocado production by region

Western Australian production has continued to increase significantly, albeit with some 'off years'.

North Queensland production continues to grow steadily, and Central Queensland continues to perform well despite severe weather events affecting harvests over the last ten years.

**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
<b>2007/08</b>	6,205	14,757	4,082	4,841	1,509	3,309	1,180	3,510	<b>39,394</b>
<b>2008/09</b>	6,227	14,783	3,160	7,456	2,567	4,475	710	7,069	<b>46,446</b>
<b>2009/10</b>	6,667	17,105	2,766	4,779	1,220	2,914	394	3,797	<b>39,642</b>
<b>2010/11</b>	6,211	20,210	3,000	4,864	890	3,748	974	9,715	<b>49,612</b>
<b>2011/12</b>	6,378	20,870	3,337	6,738	1,743	3,462	4,668	3,917	<b>51,113</b>
<b>2012/13</b>	10,399	13,164	2,603	4,027	533	2,843	2,734	18,575	<b>54,877</b>
<b>2013/14</b>	10,859	13,668	2,131	7,243	1,586	4,208	2,857	6,163	<b>48,715</b>
<b>2014/15</b>	12,310	10,054	1,782	3,848	781	3,815	3,182	21,824	<b>57,595</b>
<b>2015/16</b>	12,285	13,857	1,421	5,301	1,737	4,752	3,592	23,771	<b>66,716</b>
<b>2016/17</b>	17,599	15,882	1,401	6,964	1,500	5,645	3,517	13,483	<b>65,992</b>
<b>2017/18</b>	23,346	16,851	927	3,470	1,548	6,260	4,450	20,180	<b>77,032</b>
<b>2017/18 % by region</b>	<b>30 %</b>	<b>22 %</b>	<b>1 %</b>	<b>5 %</b>	<b>2 %</b>	<b>8 %</b>	<b>6 %</b>	<b>26 %</b>	
<b>Past 2yr average % by region</b>	<b>29 %</b>	<b>23 %</b>	<b>2 %</b>	<b>7 %</b>	<b>2 %</b>	<b>8 %</b>	<b>6 %</b>	<b>24 %</b>	

# 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



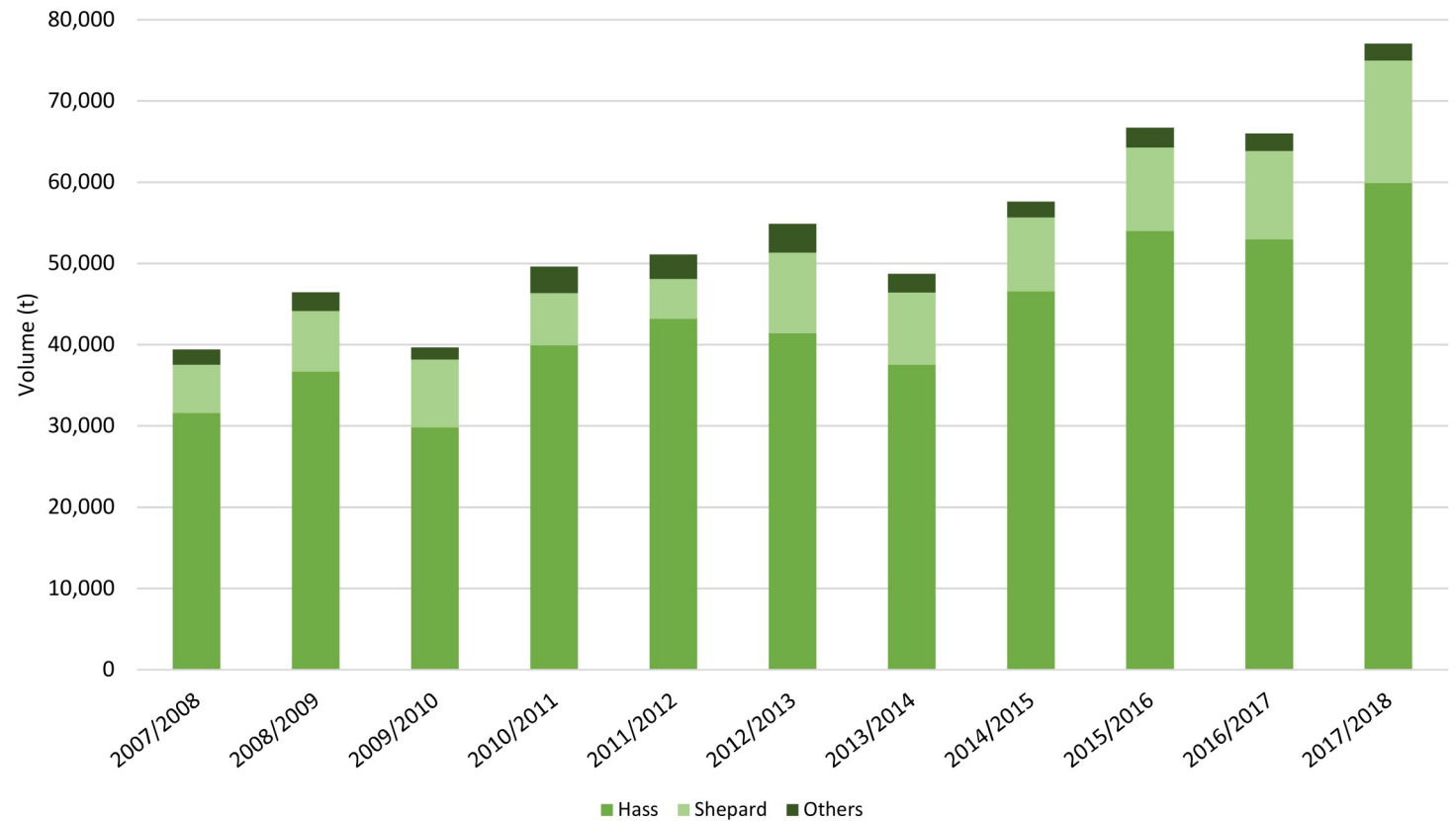
Shepard Avocado



# Avocado production by variety

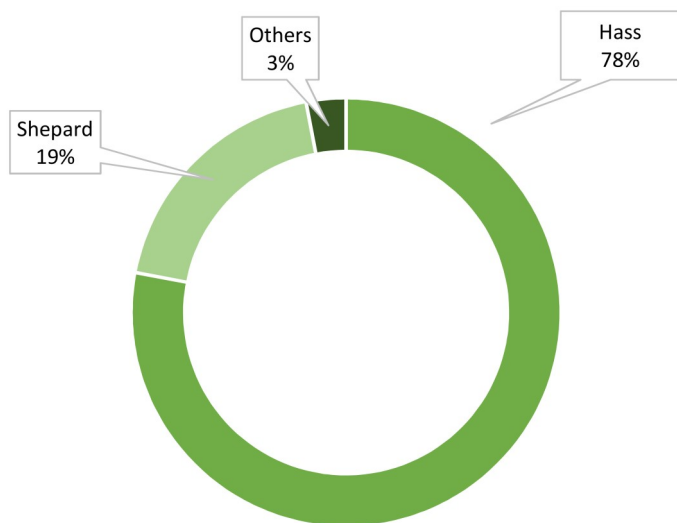
In Australia, avocados are produced almost all year round due to the range of climates and conditions in our eight major avocado growing regions. Hass is the main avocado variety, and is produced almost all year round. In 2017/18 Hass represented 78% of production. Shepard, which is grown in Queensland through late Summer and Autumn, made up 19% of production, and at that time of year, is the dominant Australian variety on the market.

Australian annual avocado production volume (tonnes) by variety



# Avocado production by variety

Australian avocado production by variety 2017/18

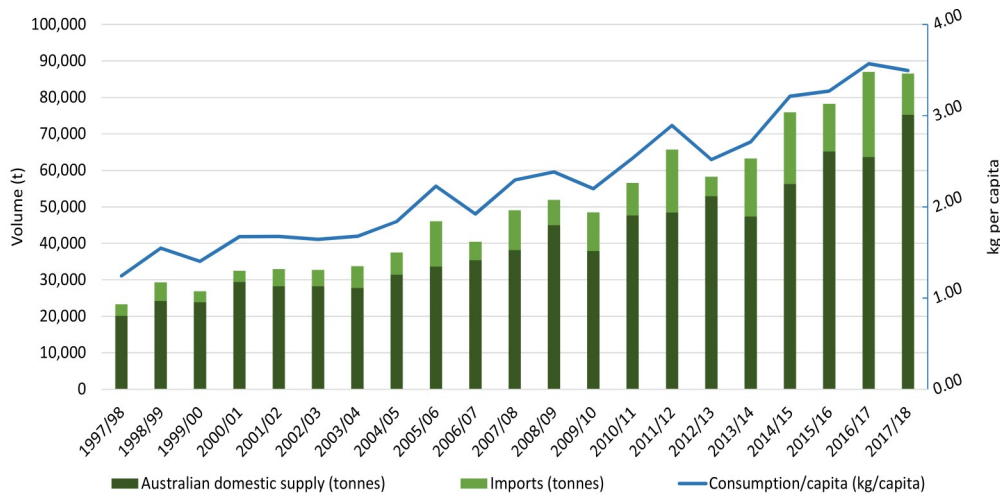


The three percent of fruit which is not Hass or Shepard is made up of the following varieties, listed in order of volume produced: Reed, Lamb Hass, Wurtz, Gwen, Sharwil, Fuerte, Pinkerton, Gem, Bacon, Edrinol.

Production by Variety (tonnes)				
Year	Hass	Shepard	Other	Total
<b>2007/08</b>	31,578	5,933	1,883	<b>39,394</b>
<b>2008/09</b>	36,669	7,450	2,327	<b>46,446</b>
<b>2009/10</b>	29,790	8,353	1,498	<b>39,641</b>
<b>2010/11</b>	39,913	6,418	3,280	<b>49,612</b>
<b>2011/12</b>	43,155	4,923	3,035	<b>51,113</b>
<b>2012/13</b>	41,398	9,923	3,556	<b>54,877</b>
<b>2013/14</b>	37,513	8,882	2,320	<b>48,715</b>
<b>2014/15</b>	46,540	9,090	1,966	<b>57,595</b>
<b>2015/16</b>	53,965	10,281	2,470	<b>66,716</b>
<b>2016/17</b>	52,962	10,860	2,169	<b>65,992</b>
<b>2017/18</b>	59,870	15,085	2,077	<b>77,032</b>

# Australian consumption of avocado

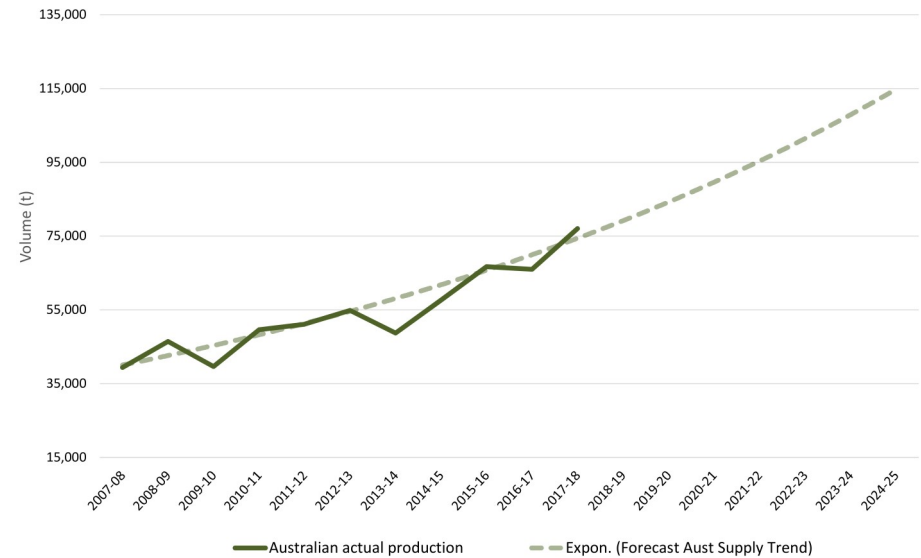
Australian annual domestic avocado supply, NZ imports and Australian per capita consumption



Sources: Infocado, IHS Global Trade Atlas (2017) and population based on ABS data

**Australia avocado consumption in 2017/18 was 3.5kg per person. Imported New Zealand fruit supplements Australian supply during their harvest season during Spring and Summer.**

Australian production forecast trend (tonnes)

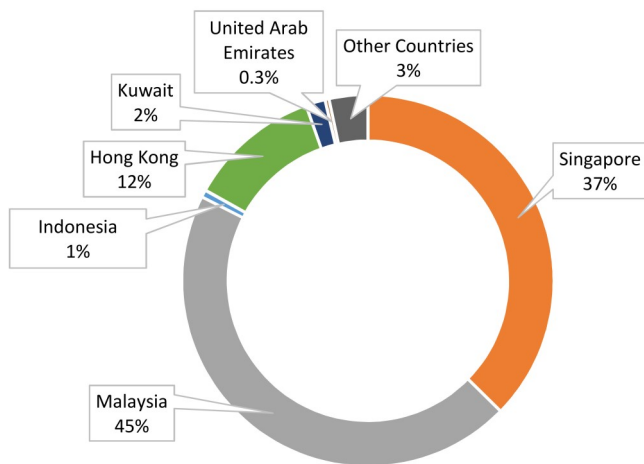


Sources: Infocado, Avocados Australia analysis

**Australian production is forecast to increase strongly over the next few years, with about 115,000 tonne per annum expected to be produced by 2025.**

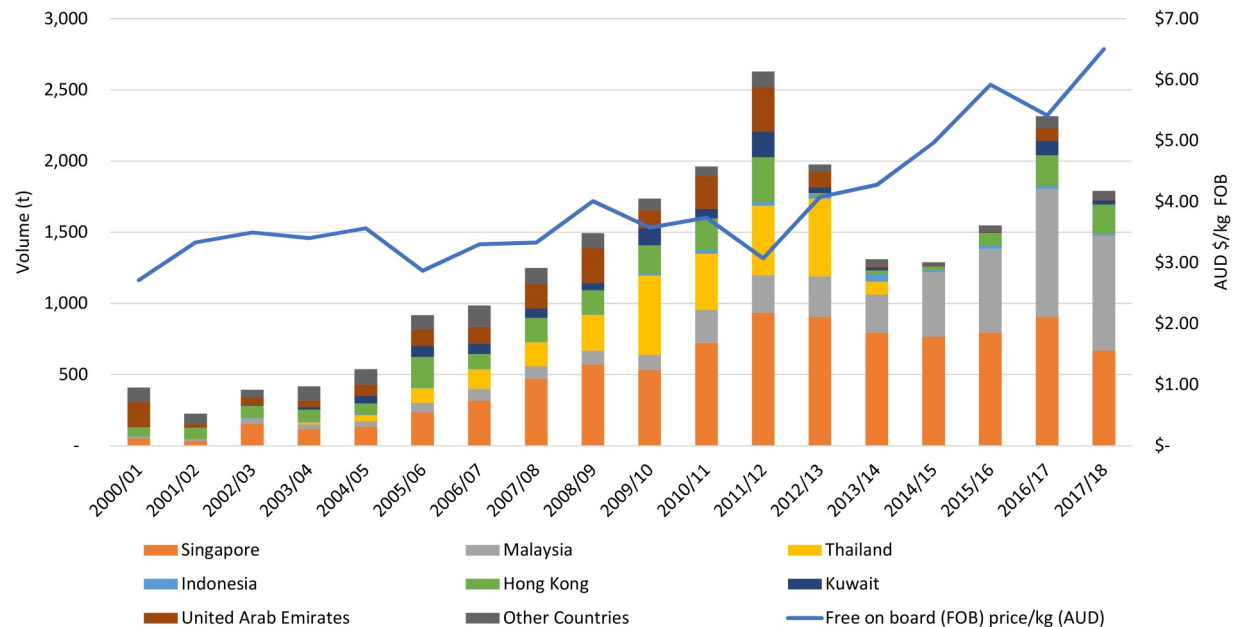
# Australian avocado export markets

Australia's export markets in 2017/18



Source: IHS Global Trade Atlas (2018)

Australian annual avocado export volumes in tonnes by country and AU\$/kg FOB (blue line)



Source: IHS Global Trade Atlas (2018)

In both production and exports, Australia is currently a small player in the world avocado market. Ongoing activity is underway targeting Australia's growth in export markets with Malaysia and Singapore, currently Australia's main avocado export markets. In 2017/18 Australia exported almost 1,800 tonnes of avocados, which is 2.3% of the 77,032 tonnes produced in Australia.