



# Monthly Export / Import Update

## June 2021

### EXPORTS

For the year ending June 2021, exports of avocados were **3,191** tonnes worth A\$22.21m and 21 per cent lower than last year to date (Table 1). Unit values were 13 per cent higher at A\$6.96 and has meant the overall value decreased by 11 per cent for the period. The MAT (Moving Annual Total) was 3,191 tonnes, rising 40 per cent since the previous month and indicating a very strong turn around in positive momentum.

**Table 1 : Avocado Key Measures**

EXPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	3,191	-21%	3,191
Value (M AUD)	22.21	-11%	22.2
\$ per kg	\$6.96	12.7%	\$6.96

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Hong Kong was the lead market for the year, up 78 per cent followed by Singapore and Malaysia both remaining lower. These markets accounted for 96 per cent of the 2020/21 exports. There have been no recorded shipments to Japan since February 2020 (Table 3)

**Table 3 : Avocado Exports by Market**  
July to June

Market	2020/21		share	MAT
	Tonnes	Chg LY		
Hong Kong	1,431	78%	44.8%	1,431
Singapore	1,019	-33%	31.9%	1,019
Malaysia	622	-57%	19.5%	622
Indonesia	58	-23%	1.8%	58
Brunei Darussalam	35	17%	1.1%	35
New Caledonia	7	121%	0.2%	7
Kuwait	7	-83%	0.2%	7
Fiji	4	-73%	0.1%	4
Qatar	3	-28%	0.1%	3
Nauru	2	31%	0.1%	2
United Arab Emirates	2	-69%	0.0%	2
Japan	-	-100%	0.0%	-
all other	2			2
<b>Total YTD Tonnes</b>	<b>3,191</b>	<b>-21%</b>	<b>100%</b>	<b>3,191</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume

++ >500% increase

share of season

100.0%

MAT - Moving Annual Total

Queensland was the largest export state (YTD) and was tracking 37 per cent higher for the year to June, ramping up mostly in the April to June period. Western Australia exports have declined 83 for the year.

**Table 2. Avocado By State**

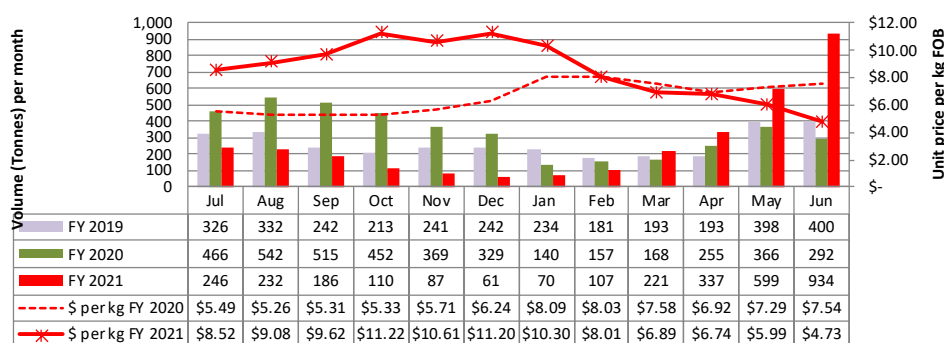
July to June			
	Tonnes	Chg LY	share
Queensland	2,138	37%	67%
New South Wales	588	5%	18%
Western Australia	237	-83%	7%
Victoria	215	-56%	7%
South Australia	6	-91%	0%
<b>Total</b>	<b>3,191</b>	<b>-21%</b>	<b>100%</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



On a month to month basis the June exports were 220 per cent higher to 934 tonnes, the highest monthly result ever recorded for Australian avocado exports, compared to 292 tonnes last year with prices 37 per cent lower at A\$4.73 per kg (Figure 1), which is at or below internationally competitive levels.

**Figure 1 Avocado Exports per month vs last 2 years**



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 93 per cent of avocado export shipments. There were 147 tonnes (16%) shipped in June.

**Table 4. Avocado By Transport Mode**

July to June			
	Tonnes	change	MAT
		%	Tonnes
Air	2,965	-26%	2,965
Sea	226	274%	226
<b>Total</b>	<b>3,191</b>	<b>-21%</b>	<b>3,191</b>



# Monthly Export / Import Update

## June 2021

### MARKET INSIGHTS

#### Hong Kong

Hong Kong has imported 19,657 tonnes of avocados in 12 months to June 2021, 44.8 per cent more than last year. Around 50 per cent is re-exported to China. Australia supplied 1,425 tonnes or 98 per cent more. Chile, the largest supplier in 2020 supplied 75 per cent less offset by a large growth from Peru.

**Table 5 : Avocado Imports by Hong Kong**

Market	July to June		Value A\$ Mill	Year	
	2020/21 Tonnes	Chg LY %		Unit Value A\$ per kg CIF	Unit Value A\$ per kg CIF
Australia	1,425	97.6%	11.1	\$7.79	\$6.95
Peru	8,707	281.7%	25.2	\$2.89	\$2.33
Mexico	5,404	59.7%	16.2	\$3.00	\$2.53
Chile	1,601	-75.1%	6.4	\$4.00	\$7.88
Other	2,519		11.1	\$4.41	
<b>Total YTD Tonnes</b>	<b>19,657</b>	<b>44.8%</b>	<b>70.0</b>	<b>\$3.56</b>	<b>\$3.19</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

#### Singapore

Singapore has imported 5,954 tonnes of avocados in 12 months to June 2021, 27 per cent more than last year. Australia supplied 1,032 tonnes or 31 per cent less than last year. Mexico became the largest supplier and posted 57 per cent growth and US and Kenya increased 116 per cent each offsetting Australia's decline. import value. Australia's recorded CIF prices have reduced to A\$4.63 in June.

**Table 6 : Avocado Imports by Singapore**

Market	July to June		Value A\$ Mill	Year	
	2020/21 Tonnes	Chg LY %		Unit Value A\$ per kg CIF	Unit Value A\$ per kg CIF
Australia	1,032	-30.9%	7.6	\$7.36	\$4.63
Mexico	1,760	57.3%	8.6	\$4.88	\$7.14
United States	1,332	115.9%	7.9	\$5.94	\$6.64
Kenya	843	115.6%	2.3	\$2.68	\$2.62
Other	987		3.7	\$3.72	
<b>Total YTD Tonnes</b>	<b>5,954</b>	<b>29.6%</b>	<b>30.0</b>	<b>\$5.04</b>	<b>\$4.41</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

#### Malaysia

Malaysia has imported 3,663 tonnes of avocados in 11 months to May 2021, 39 per cent more than last year. Australia supplied 643 tonnes or 51 per cent less than last year. Mexico became the largest supplier and posted 250 per cent growth and US increased 7 x fold to offset Australia's decline. Kenya increased by 94 per cent. Australian CIF prices were recorded more than 100 per cent above the average import value for the year though have reduced by May.

**Table 7 : Avocado Imports by Malaysia**

Market	July to May		Value A\$ Mill	Year	
	2020/21 Tonnes	Chg LY %		Unit Value A\$ per kg CIF	Unit Value A\$ per kg CIF
<b>Australia</b>	<b>643</b>	<b>-51.3%</b>	<b>5.8</b>	<b>\$9.07</b>	<b>\$6.56</b>
Mexico	893	250.5%	3.7	\$4.18	\$2.73
United States	738	695.3%	3.4	\$4.59	\$5.39
Kenya	633	94.6%	1.8	\$2.84	\$2.73
Other	757		2.5	\$3.31	
<b>Total YTD Tonnes</b>	<b>3,663</b>	<b>39.4%</b>	<b>17.3</b>	<b>\$4.71</b>	<b>\$4.89</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis



# Monthly Export / Import Update

## June 2021

### IMPORTS

For the 12 months to June 2021, imports of avocados were **28,027** tonnes worth A\$184.7m. The result was 74 per cent above the same period last year (Table 5) and includes imports from Chile. Unit values increased 36 per cent to A\$6.59 and has meant the overall value increased by 131 per cent for the 2020/21 year. The MAT (Moving Annual Total) was thus 28,027 tonnes being the same as the season to date.

IMPORTS	YTD (from July)	Chg LY	MAT
Volume (tonnes)	28,027	74%	28,027
Value (M AUD)	184.70	131%	184.7
\$ per kg	\$6.59	35.8%	\$6.59

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Market	July to April		Value	Unit Value
	2020/21	Chg LY		
	Tonnes	%	A\$ Mill	A\$ per kg
New Zealand	25,509	58%	171.6	\$6.73
Chile	2,518	++	13.1	\$5.19
<b>Total YTD Tonnes</b>	<b>28,027</b>	<b>74%</b>	<b>184.7</b>	<b>\$6.59</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

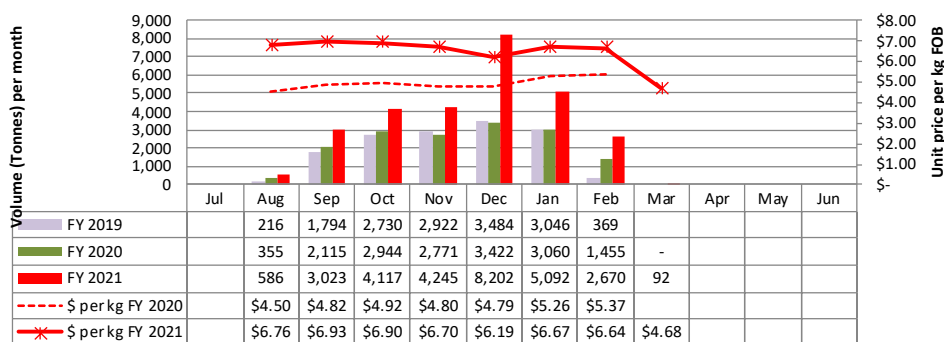
New Zealand, as always, was the lead supplier for the seven months, up 58 per cent supplemented for the first time by Chile that supplied 2,518 tonnes during the season.

The unit value of imported avocados (CIF) is showing A\$6.73 for New Zealand and A\$5.19 for Chile.

**ACCORDING to Chilean export data, Chile has shipped 2501 tonnes to Australia before their season ended early in December. This concurs with the ABS data showing imports of 2,518 tonnes by end February.**

There were no imports recorded since March as expected, with the next import season expected from August. (Figure 2).

**Figure 2 Avocado Imports per month vs last 2 years**



Source: IHS Global Trade Atlas; Fresh Intelligence analysis