Delivery partner resource

Horticulture Impact Assessment Program

AV20004 Case Study

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Hort Innovation

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AV20004 Avocado Market Access and Trade Development

Brent Chambers

Table 1 AV20004

Stakeholder	Brent Chambers
Business	The Avocado Collective
Location	Western Australia

What was the research about?

AV20004 Avocado Market Access and Trade Development program was designed to expand Australian avocado exports by supporting access to new protocol markets, strengthening demand for Australian avocados in existing international markets and building the capacity of industry to support increased production to meet rising demand.

A key component of the project was preparing the Australian avocado industry (industry) and its supply chain to access these new markets and to adhere with the phytosanitary requirements in new protocol markets. AV20004 aided growers through the provision of export education, the development of systems, and other trade related activities thereby ensuring the readiness of the industry to meet growing demand for exports.

The industry has been rapidly increasing production, with production value increasing 38% from $426.7 million in 2018-19 to $589.0 million in 2023-24.[1] Over this period, exports have accounted for an increasingly large proportion of production value, with exports growing 388% from $19.7 million to $96.1 million, with export markets providing a profitable outlet for domestic oversupply, offering a higher price per kilogram than domestic sales.[2] The project has had considerable impact in supporting and accelerating this growth by supporting the establishment of new protocol access markets and to ready the avocado supply chain to access and supply these new markets in adherence with local phytosanitary requirements.

In this case study, Brent Chambers of The Avocado Collective shares his experiences with the project and its benefits to industry.

Brent's background in the avocado industry

Brent works for the Avocado Collective, a Western Australia (WA) based company with operations in both WA and far north Queensland. The Avocado Collective comprises over 70 growers and operates 52 weeks a year, they are the largest exporter in the industry, they supply all major domestic retailers and food service markets. Brent estimates the Avocado Collective makes up roughly 40% of total industry volume.

Brent is also engaged more broadly across the industry, sitting on the avocado Strategic Industry Advisory

[1] Hort Innovation (n.d.). Australian Horticulture Statistics Handbook 2024/25. Accessed at: https://www.horticulture.com.au/growers/help-your-business-grow/research-reports-publications-fact-sheets-and-more/australian-horticulture-statistics-handbook/

[2] Ibid.

Panel (SIAP) and various project reference groups (PRGs) across the last 5-years.

Brent’s involvement in the project

Brent was involved in the PRG for AV20004 as an industry representative, overseeing the project from inception to completion and the transition from AV20004 to AV23003 – Avocado Market Access and Trade Development Project (2024-29). He also directly engaged with in-person workshops provided by the project. These engagements were positively received, with Brent acknowledging the new knowledge he’d gained through the workshop, the applicability of these learnings and the timeliness of delivery. He highlighted how the succinct delivery of key information helped to inform business decisions and mitigate risk, through the provision of information on the benefits and pitfalls or certain decisions. This supported industry stakeholders to make strategic decisions and to undertake pre-emptive actions that aided adaptation to changing export market opportunities and protocols.

Why is this research important for the avocado industry?

Brent acknowledged AV20004’s importance in supporting new market access and guiding informed, strategic decision making for growers and packhouses in short time frames. The opportunities and information provided through workshops were seen as irreplaceable outputs of the project.

In the absence of a project such as AV20004, Brent believed the information he gained through the workshops would have been lost in translation and lacked the ‘nitty gritty’ details required by industry stakeholders to aid change.

How has the research impacted industry practices?

Brent indicated that AV20004 has been embraced by industry, with the project appropriately supporting industry where an explicit need for strategic oversight and guidance was identified.

The project supported the development of the Avocado Export Strategy and provided industry stakeholders with visibility of a strategic roadmap moving forward. The roadmap outlined the timing of future export opportunities for industry and included the necessary requirements of industry supply chain participants moving forward to enable the realisation of future export opportunities.

This visibility had a positive impact at the industry level, in addition to the business level impacts. Improved understanding of the elongated timelines for market access to major export markets such as China, has enabled the strategic reallocation of levy funds to manage the research and development (R&D) budget over a longer time horizon.

Budget management changes have been achieved while simultaneously aiding earlier and accelerated adoption of new protocols across the supply chain for India and Thailand. This preparatory work, in addition to Avocados Australia Limited’s (AAL’s) communications and strategic oversight of the project, were identified as key enablers for gaining and sustaining access to new protocol markets.

As a result of these project outcomes the Avocado Collective, are supplying fruit to more international markets, including protocol access markets in India, Thailand and Japan (WA growers only).

What were the challenges with adopting recommendations from the project?

While he acknowledged that it was outside of the project’s scope, Brent suggested that there are opportunities for future projects to link in with the commercial realities of what access to new markets looks like on the ground. Be it through support in identifying and engaging key, and trusted, contacts for supplying fruit in a new market or by discussing and working through supply chain logistics in these new markets. These opportunities would support a smoother transition for businesses engaging in and supplying new markets, avoiding adverse outcomes in the short term. This would be particularly important were Australian avocados to gain protocol access to China, which in 2023 imported USD $122.4 million (in 2023 dollars).

Final reflections

Beyond the project, Brent highlighted the benefits of the current approach to avocado R&D funding. In his view the current approach enables industry representatives to quickly pivot R&D expenditure as required. He noted the benefits to industry through their ability to reallocate funds away from unproductive projects, thereby avoiding time lost to these projects, and to rapidly respond to evolving industry needs.

Finally, Brent acknowledged the value of the full-time export management role established within AAL, initially funded through AV20004. He spoke to the quality of work undertaken through the role, gathering critical information and providing timely distribution/communication of this information across industry. He believes the impacts of the role are leveraged by the respect held for the individual in the AAL role across industry stakeholders and the ease with which stakeholders could engage with AAL.