

Final Report

Avocado market access and trade development

Project leader:

John Tyas

Report authors:

Flora Zhang and John Tyas

Delivery partner:

Avocados Australia Ltd

Project code:

AV20004

Project:

Avocado market access and trade development (AV20004)

Disclaimer:

Horticulture Innovation Australia Limited (Hort Innovation) makes no representations and expressly disclaims all warranties (to the extent permitted by law) about the accuracy, completeness, or currency of information in this Final Report.

Users of this Final Report should take independent action to confirm any information in this Final Report before relying on that information in any way.

Reliance on any information provided by Hort Innovation is entirely at your own risk. Hort Innovation is not responsible for, and will not be liable for, any loss, damage, claim, expense, cost (including legal costs) or other liability arising in any way (including from Hort Innovation or any other person's negligence or otherwise) from your use or non-use of the Final Report or from reliance on information contained in the Final Report or that Hort Innovation provides to you by any other means.

Funding statement:

This project has been funded by Hort Innovation, using the avocado industry 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.

Publishing details:

Published and distributed by: Hort Innovation

Level 7

141 Walker Street

North Sydney NSW 2060

Telephone: (02) 8295 2300

www.horticulture.com.au

© Copyright 2024 Horticulture Innovation Australia Limited

Contents

Public summary.....	4
Introduction	6
Methodology	7
Results and discussion	11
Outputs	13
Outcomes	16
Monitoring and evaluation.....	19
Recommendations.....	19
Appendices	23
Appendix 1 – Export Development Events	23
Appendix 2 – Extract of the export registration system.....	46
Appendix 3 – Pick of the Communication examples.....	46
Appendix 4 – Export Articles in the Talking Avocados.	47
Appendix 5 - Extract of the Exporter Directory and pitch pack.....	65

Public summary

The AV20004 project, led by Avocados Australia (AAL), ran from 2021 to 2024 with the goal of transforming the Australian avocado export industry. Over three years, the project focused on expanding existing export markets, accessing new ones, and building industry capacity to support the rapid increase in avocado production. The results were significant, with export volumes increasing by over 600% during the project's lifespan, reaching over 21,979 tonnes by October 2024.

A key part of the project was the establishment of a skills-based Project Reference Group to develop priorities and annual work plans. The project aligned with the Australian Avocado Export Strategy, focusing on new market access, maintaining existing markets, and enhancing the supply chain's export readiness. The overall budget for the project was \$1.74 million, generating an impressive benefit-cost ratio of 3.78:1, resulting in an estimated return of over \$10.5 million.

Major Achievements

One of the most impactful outcomes was securing access to **two new export markets**: Thailand and India. This expanded the reach of Australian avocados and positioned the industry for sustained global growth. Key achievements included:

- **Supporting DAFF** (Department of Agriculture, Fisheries and Forestry) in securing market access for Thailand and India, with events and workshops to activate these markets.
- Providing expert advice to government bodies and industry stakeholders, including state governments, exporters, growers, Austrade, Hort Innovation, and others.
- Conducting **protocol seminars**, developing an export registration system, and organizing workshops to help growers comply with export requirements.
- Coordinating **inbound and outbound trade missions**, participating in trade shows in key markets such as Dubai, Hong Kong, Japan, and India, and fostering relationships with foreign officials and avocado industry groups.
- Publishing articles in **Talking Avocados magazine** and other industry channels to disseminate important information to stakeholders.

Outcomes and Impact

The project delivered significant benefits across multiple areas:

- **Strengthened relationships** with key stakeholders through enhanced consultation, supporting market access and trade development efforts.
- Increased **skills and knowledge** among avocado growers to meet export protocols, improving their export readiness.
- Heightened awareness within the industry about both existing and emerging export opportunities.
- Successfully developed the export supply chain, achieving 100% approval of export registrants by DAFF each year, ensuring adherence to protocols for Japan, Thailand, and India.

These efforts not only enhanced the **reputation of Australian avocados** but also contributed to more efficient supply chains and improved access to high-value export markets. The project's collaboration with other horticulture sectors helped share best practices and strengthen the industry as a whole.

Through its strategic initiatives, the AV20004 project has positioned the Australian avocado industry for long-term growth and competitiveness on the global stage, ensuring continued success in export markets.

Keywords

Australian avocados; export; market access; trade; market development; growers; packhouses; report; risk management.

Introduction

The growth in Australian avocado production has increased domestic market pressure, raising the risk of oversupply. Despite facing substantial challenges such as the COVID-19 pandemic, seasonal labor shortages, rising production costs and rapid production growth, the industry has demonstrated remarkable resilience. For the 2023/24 year, exports of avocados recorded 21,979 tonnes, 106 per cent above the previous years' export volume, worth A\$96.1m. The overall value increased by 64 per cent. However, unit values were 20.6 per cent lower at AU\$4.37 per kg (FOB). The MAT (Moving Annual Total) was 7.1 per cent higher since the previous month's MAT maintaining a strong positive momentum. Australian avocados industry was the third largest export fruit category by value in the Australian horticulture sector in 2023/24.

Over the course of this project, Australian avocado growers have recognized the positive impact of expanding export trade. Increasing exports is essential for the industry's sustainability. Over the past three years, significant efforts have been made to support the export sector through the AV20004 project.

This project was implemented to achieve the following objectives:

- Design and guide the Australian avocado industry's ongoing market access and trade development agenda and develop tools and training to capitalise on the opportunities being created
- Grow exports through creating an informed industry with capacity to participate effectively in export supply chains
- Grow exports through improving supply chain connectivity and market access opportunities
- Engage with all relevant stakeholders both domestically and internationally to facilitate export market access and market development for the Australian avocado industry
- Develop and maintain information to guide export decision making and to build export knowledge within the Australian avocado industry, through linkages with related projects
- Provide export industry development services for the Australian avocado industry and deliver extension services to develop an export culture and increased knowledge of export, including knowledge of all aspects of the supply chain and activities needed to grow export capability and success.

Numerous export industry development activities are necessary for the industry to reach its export potential. Many of these have been supported through this project. The export project has focused on three key areas identified in the Export Strategy: market access and maintenance, export trade development, and building industry capacity.

Methodology

1. Project management and planning

Avocado Australia employed a full time Export Development Manager (EDM) to manage the day-to-day activities within the project. A project reference group (PRG) was established involving key avocado exporters with an interest in the long-term development of avocado exports, including two representatives from the AAL Board and a representative from Hort Innovation. The PRG met face to face and on-line six monthly, and on an as-needs basis to plan and review project activities.

Over the life of the project, the project team provided input to export planning and facilitated the development of the Avocado Export Strategy 2022-2026 (Delivered under a separate project AV21000) to align with the term and priorities of the Avocado Strategic Investment Plan 2022-2026. The new export strategy sets out priorities in relation to market access, market improvement and market development. The PRG provided input to the development and maintenance of this strategy.

An annual workplan and progress reports were developed and endorsed by the PRG each year and submitted to Hort Innovation in milestone reports. The work plans aligned with the priorities in the Avocado Export Strategy 2018-2021 and 2022 - 2026 and Hort Innovation's market development programs.

2. Export communication and engagement

Communication and Stakeholder Engagement Plan

An export Communication and Stakeholder Engagement Plan was developed by the project team and approved by Hort Innovation. The project utilized multiple channels of communication directly with all growers and avocado industry stakeholders. An export section was included in the industry newsletter *Guacamole* to provide a focal point for news and information specifically relevant to export stakeholders. Project updates and important communications were distributed fortnightly through articles in *Guacamole* and direct emails to export news subscribers. Up to three articles for each edition of *Talking Avocados* (the printed quarterly industry magazine) were published with the latest outcomes and reporting from the project. Ongoing social media (LinkedIn and Facebook) was also used to share export insights and in-market learnings.

Avocados Australia maintained associate membership of Australian Horticulture Trade (AHT) to facilitate dissemination of relevant information from the export community and to provide information about the avocado export activities to the broader horticulture export community. During the project, an [industry trade video](#) and a [Shepard avocado showcase video](#) (with support from FF2M Queensland government grant) were developed to highlight our industry and Shepard avocados. These videos have been utilized at trade shows and export-related events as appropriate. Additionally, the videos have been re-edited into shorter clips for social media platforms such as TikTok. This strategy aims to enhance overseas audiences' knowledge and understanding of the Australian avocado industry, covering aspects from growing and packing to export handling.

A set of market access protocol training videos and printed checklists were produced and published to help growers and packers onboard with market access protocols with visual demonstration on the requirements.

3. Export Culture and Capacity Building

Data analysis and reporting

Project AV22016 (delivered by Avocados Australia) included a component of data analysis to support export development. The following trade reports were produced under a Global Avocado Trade Data and Analysis Framework in Project AV22016:

- Australian avocado exports and imports – twice per year – August, February
- Global market report – avocado producers and market suppliers - October, annually
- Global market report - avocado import markets – October, annually
- Australian avocado export and imports - monthly
- Australian avocados export report – weekly

- Australian avocados export intelligence portal – to report on retail pricing data from the selected key export markets

The reports were uploaded to the online Best Practice Resource (BPR) Export Module on Avocado Australia's website and communicated to the avocado industry stakeholders via Guacamole, social media platforms and direct emails to export news subscribers.

Meetings with key stakeholders

The project team maintained regular engagement with the Department of Agriculture, forestry and fishery (DAFF) in Canberra to discuss market access issues including formal (Market Access Advisory Group (MAAG) meetings.

The Export Development Manager represented the avocado industry on the Horticulture Export Industry Consultative Committee (HEICC). Through HEICC, the avocado industry had input to 'across horticulture', commercially relevant issues and recommendations to Hort Innovation regarding suitable trade-related research and development investments.

HEICC is a forum for the Department of Agriculture, Fisheries and Forestry (DAFF) to consult with the industries involved in the export of horticulture products. Within the framework of government policies and legislation delivered by the department that relate to the export inspection and certification, the committee is the primary consultation body to:

- discuss export inspection and certification issues affecting industry and propose solutions to address these issues
- discuss relevant market access issues
- discuss the performance of the department's programs
- communicate outcomes of the committee's work to relevant export industries; and
- explore, identify and promote opportunities to improve the efficient and effective administration, provision and consumption of the department cost recoverable regulatory activities and services.

The participation in HEICC has allowed the avocado industry to raise issues affecting avocado exports to DAFF and communicate the key messages arising from discussions with the department to industry stakeholders.

The project team members have been actively engaged with Austrade and state-level trade agencies such as DPIRD and TIQ. During the inbound missions in 2023 and 2024, we received financial and in-kind support, hosting delegates from over six countries, including importers and retailers.

The project has received additional funding via grants from Queensland government (FF2M) to provide additional resources to support to drive awareness for Shepard avocados in Singapore, Malaysia and Hong Kong.

Regional engagement

The project team conducted export regional forums with commercial stakeholders, including growers and packhouses, across Tamboorine/Northern Rivers (TNR), North Queensland (NQ), South Queensland (SQ), Central Queensland (CQ), and Western Australia (WA). These forums covered a range of topics, such as supply chain management best practices, overseas market insights, a case study of the Australian table grape industry, updates on export strategies, and project progress. Despite the challenges, these forums enabled meaningful dialogue and alignment among stakeholders on export goals and strategies in adapting to new market conditions.

Due to the impact of COVID-19 and travel restrictions, a few export regional forums were unable to take place or were merged into the regional extension forums as well as webinars.

Throughout the project, meetings were held as needed between the project team, key exporters, and representatives from Hort Innovation.

MRL information updates

Avocado Australia commissioned a mobile phone application to report on Maximum Residue Limits (MRLs) for key export markets in a timely manner. The MRL application compares the MRLs for products registered on label or permit

with those in the key exporting countries. The information has been communicated to the industry through Guacamole and regional export forums and uploaded in the export section in BPR on Avocados Australia's website. The MRL mobile application can be downloaded [here](#).

Australian Wine Research Institute (AWRI) provide a full suite of services to many Australian horticulture industries to assist in MRL data management. AAL have retained AWRI and their services to support the ongoing development and updates to the MRL Application, specifically, monitoring and updating withholding periods for Active Ingredients, monitoring the weekly change log and taking corrective actions, and ensuring MRL data supply from Third Party IP under the terms of agreement.

Market Access Support

The Australian avocado industry gained protocol market access to India and Thailand in 2023. AAL cooperated with DAFF to assist in converting the draft protocol to an approved protocol. Both India and Thailand required verification shipments to provide assurances that our standards could meet the protocol work plan. For Japan, India and Thailand, in 2023 and 2024, AV20004 provided support for the annual inspection by the trading partner auditors. AAL cooperated with DAFF and industry to provide farm and pack shed access to the auditors. The trading partner has the liberty to handpick_select which accredited properties they wish to audit, and AAL provides coordination and communication with stakeholders to assure a seamless, best practice, and derisked process for industry. Whilst the trading partner auditors were in country, AAL travelled to the place of audit to support the process on-ground, to mitigate unforeseen circumstances that could disadvantage industry whilst under the auditor's watch.

1. **India** – India required 10 verification shipments to gain formal protocol approval from the Indian National Plant Protection Organization. These verification shipments required whole-of-industry coordination. AAL mobilised resources across the industry to interface with DAFF in Canberra and in India, to sequence the shipments in keeping with the Indian draft protocol work plan. There were some administration issues (at the India side) in the initial 10 shipments and India requested an extra four shipments to confirm our operations met the protocol requirements.
2. **Thailand** – Thailand required one verification shipment. Unlike the Indian verification shipments, Thailand sent two Quarantine Inspectors to Western Australia to watch the fruit being picked, packed, secured and shipped. This inspection of the shipment process also involved DAFF. AAL coordinated supply chain stakeholders to ensure the process was seamless and without issues. Thailand was satisfied with the verification shipment and soon after provided official protocol approval.

Protocol registration training

Each year, Avocados Australia, in collaboration with DAFF and the Australian Table Grapes Association (who own the registration software), convened industry webinars to educate/train growers and packers how to register to become accredited properties for protocol markets. AAL provided 1-on-1 post-webinar support to help growers and packers complete their online registrations and prepare for their audit. To ensure AAL achieved optimal participation, AAL sent multiple webinar participation reminders via email and via industry communications. Aside from the administrative registration process, the most critical component to the webinar was DAFF clearly articulating the protocol work plan. AAL cooperated with DAFF to carefully curate the webinar presentations to ensure they captured the entire supply chain process.

Protocol related R&D support - FASTA

AAL, with the support of FASTA, convened a stakeholder Roundtable on 7 December 2023. The Roundtable was hosted by FASTA at the QDAF Redlands Research Facility, and in attendance were representatives from AAL, AAL Board, industry, QDAF, DAFF, DPIRD, CSIRO, HIA and Fresh Intelligence Consulting. The Roundtable, and subsequent communications, derived an *Avocado Market Access R&D Plan*. The Plan was vetted by DAFF for gaps and clarity. After the plan was agreed, AAL followed up with DAFF Plant & Biosecurity Team Leaders to gain assurances the plan was valid and that pre-existing data packs were deemed sufficient for new market access. AAL participated in R&D Technical Working Groups (TWG) and relayed updates and outcomes to stakeholders where necessary. HIA have a copy of the plan and AAL and industry are coordinating with HIA and FASTA to implement the plan.



Photo: 7 December 2023, AAL FASTA Roundtable, QDAF Redlands Research Facility, Cleveland, QLD

4. Trade Development and Market Access

Throughout the Australian Avocado Market Access and Trade Development project, several key initiatives were implemented to improve market access and engagement with trade for Australian avocados. These initiatives focused on adopting the new protocols, enhancing export capacity throughout the supply chain, and provide ongoing support to trouble shoot any export related barriers. In parallel, ongoing efforts were made to sustain existing markets by engaging regularly with importers, ensuring adherence to regulatory requirements, and participating in trade shows and market development activities.

Building collaborative partnerships with key stakeholders—such as government agencies, industry associations, and international trade organizations—was also a major focus. These partnerships were essential for addressing regulatory challenges, delivering improved practices, and promoting Australian avocados in global markets.

Moreover, trade missions were conducted to showcase Australian avocados, establish relationships with international buyers, and explore new market opportunities. These missions included outbound visits to target markets and inbound tours for international buyers to Australian production sites. Through these initiatives, ongoing in-market relationships were nurtured with key market players, reinforcing Australia’s position in international markets. Regular communication, joint promotional efforts, and participation in global trade events further supported these relationships.

By implementing these strategies, the project successfully bolstered the export capabilities of the Australian avocado industry, expanded market access, and supported the industry's long-term sustainability and growth.

Throughout the project, Avocados Australia also played a crucial role in providing active input into the Australian avocados B2C marketing campaigns in overseas markets. These efforts were aimed at building and strengthening the Australian avocado brand with the support of trade partners, who were actively engaged throughout the year. Acting as a vital bridge, Avocados Australia ensured that information and updates about the industry and market trends flowed seamlessly throughout the supply chain, fostering a cohesive approach to market development and brand promotion.

Results and discussion

In the development of the Australian avocado industry, efforts have been undertaken to ensure robust market access and growth. Avocados Australia has been actively involved in visiting avocado-growing regions across the country, hosting export workshops and forums in the six main production regions. These events have been crucial for providing growers and exporters with the latest information on market access and development, often in collaboration with the Department of Agriculture, Fisheries and Forestry (DAFF).

The organization has engaged with the broader horticultural community, including growers, exporters, industry representative bodies, and other relevant stakeholders, to address all export-related matters. Avocados Australia has also facilitated industry development, training, and information sessions, ensuring that the latest market requirements and opportunities are communicated effectively to growers and exporters.

Avocados Australia has liaised closely with Australian embassies and agricultural counsellors, federal and State governments focusing on market access and trade development.

Efforts have also included sourcing and sharing market intelligence reports from various countries, contributing to market access and trade development articles in industry publications, and providing regular updates through the industry communication program.

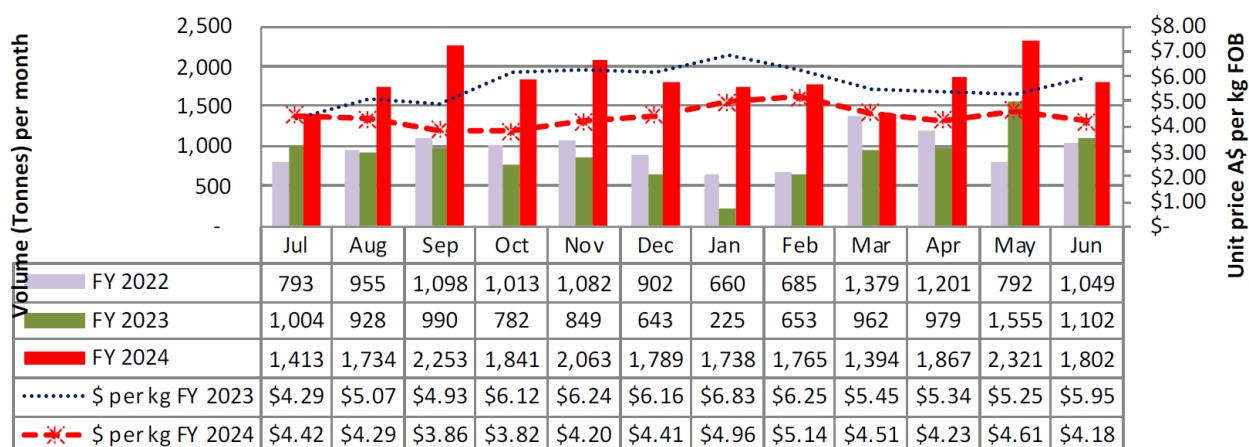
Avocados Australia has successfully coordinated export registrations for all growers and packhouses for the three protocol markets (Japan (WA only), Thailand (Japan (WA only) and India), and facilitated both inbound and outbound trade missions.

Avocados Australia has actively participated in international market trade shows, progressed market access and improvement requests with the federal government, and coordinated international audits of avocado farms, covering the entire process from picking to packing and marketing. The organization has also produced an updated export directory each year, ensuring that industry stakeholders have access to the most current information.

As a result of these activities, Australian avocado producers successfully exported their avocados to numerous countries including new markets in the middle east region, Thailand and India. This achievement comes despite ongoing challenges posed by global competition. Despite these difficulties, the avocado industry sustained a significant volume of exports and achieved over 600% growth in the three years. As export volumes have increased the industry is now utilising both air and sea freight. The sea freight proportion has increased from less than 10% to up to 50% at times.

Figure 1 below summarises the industry export volume and FOB prices over the past three years.

Figure 1 Avocado Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Outputs

Table 1. Output summary

Output	Description	Detail
Annual market access and trade development work plan	Annual review of the work plan delivered in milestones and to the PRG	Six-monthly reviews of: 1. Annual work plan – including Stakeholder engagement plan 2. Risk management plan and Program logic
Export Forums and interaction with growers on export specific topics including guest speakers from overseas See Appendix 1 – Export Development Events	The audience were levy paying farmers who interested or intended to export their product.	In-person communication within the growing regions is greatly appreciated by levy payers as a crucial source of information. The presentations addressed topics such as updates to the export registration system, insights from export market reports, the latest developments in current export campaigns, and expectations for grower compliance with DAFF audits.
Engagement and representation with avocado growers, and stakeholders to support with protocol adoption and registration	Intended audience was growers and pack houses	Each year, all growers and packhouses were supported to register through the avocado online registration portal to export to protocol markets such as Japan, Thailand, and India. This process requires farms to map out individual blocks, calculate their size, list intended country destinations, assign block numbers, indicate the locations of pest traps, and designate a meeting point for DAFF auditors. See Appendix 2 – Extract of the export registration system
Ongoing social media, BPR website, E-newsletters webinars and direct emails	Talking Avocados, Guacamole e-newsletter, BPR, Avocados Australia's website and AAL social media platforms	Contribution to each edition of Talking Avocados (the printed quarterly industry magazine). An export section was set up in the industry newsletter Guacamole to provide a focal point for news and information specifically relevant to export stakeholders. Project updates and important communications were distributed fortnightly through articles in Guacamole and direct emails to export news subscribers. See Appendix 3 – Pick of the Communication examples
Protocol checklist, training video, and webinar	Audiences was for growers and packers to adopt protocol and be familiar with the protocol requirement	The checklist and videos have been promoted via BPR, regional forum/webinars and industry led communication channels. • Grower Video Guide (Duration: 23 minutes 6 seconds) • Grower pre-season checklist • Grower audit and record keeping requirements • Pack House Video Guide (Duration: 25 minutes 21 seconds) • Packhouse pre-season checklist • Packhouse audit and record keeping requirements

Case study on Australian table grapes industry	Audiences was for growers, packers and exporters to know the journey of another export-oriented industry	The interview has been turned into articles and video has been promoted at all the regional forums as well as other social media channels. • Export journey of Australian table grapes industry (AV20004 case study) • Video for the interview
Articles for Talking Avocados	Total of 87 articles have been published in the 12 editions of the Talking Avocado magazines	Topics that relate to market access and trade development: Export development related activities, Marketing, international marketing campaign updates, market access updates and learnings/summaries from inbound/outbound study tours, See Appendix 4 – Export Articles in the <i>Talking Avocados</i>.
Website maintenance - BPR	Availability of information via the website was paramount to the success of the project deliverables.	Grower facing site https://avocado.org.au/best-practice-resource/export/ external facing - httpGlobal - Avocados Australiaaps://avocado.org.au/global/
Participation and coordination of Outbound (4) and Inbound (3) trade missions	Audience was for all growers and exporters, Outbound was under an EOI process	Inbound trade mission from Thailand, China, Japan and a delegation from Southeast Asian counties of Thailand, Philippines, Malaysia, and Singapore received by the AAL, industry presentations, farm and pack house visits and grower and exporter networking sessions. All the inbound missions were organized in conjunction with the program or support from the state government (TIQ and DPIRD) Outbound trade mission to SE ASIA (2022), GCC (2023&2024) and India (2024) and exporters attended from an EOI process. Visited retail outlets, distribution centers, cool storage facilities and conducted networking sessions with importers
Organization of the product launch programs upon market access successfully granted	Audience was for overseas importers, retailers and government officials (incl. embassy)	In Sept 2023, AAL has organized and carried out a launch in Bangkok, Thailand with over 80 participants attended. Western Australia's minister of agriculture Jackie Jarvis has attended the launch in Bangkok. In May 2024, AAL has organized the launch in the high commission in Delhi India for a media conference and a trade launch with the deputy Australian high commissioner attended and support the launch.
Exporter directory production	Audience is all importers and distributors from around the world	Avocados Australia's new Exporter Directory includes all the information an importer needs to import Australian Avocados. It features the contact details of Australian Exporters and other useful information. https://avocado.org.au/global/Australian avocados Pitch Pack here From the exporter's directory, AAL has developed a Pitch Pack includes all the information an importer needs to import Australian Avocados from quality to recipes. Australian Avocado - Pitch Pack 2023 by Effigy Creative Pty Ltd - Issuu

		See Appendix 5 - Extract of the Exporter Directory
Industry showcase video and shepard showcase video	The videos are produced in collaboration with AV21004 avocado communication project and FF2M grant from QDAF	Videos includes interview growers, showing farms and growing regions landscape and some avocado recipes Australian avocado trade video with subtitles Shepard avocados - Australian grown
Provided support to the market access related R&D and provide coordination support for the prioritization for the R&Ds – Avocados Market Access R&D Plan	To support FASTA and other market access related R&D	Work closely with QDAF and be the bridge between the research provider and the industry. HIA own the Plan and is available upon request.
Taste Australia/Australian avocados trade show attendance	Asian and GCC importers, retailers and distributors	Participated and attended trade shows in Hong Kong and Thailand– Asia Fruit Logistica; (2022-2024) Japan – Supermarket Tradeshow (2022-2024) UAE – Gulfood 2023 &2024. India – Fresh Produce India (2024)
Project reference group meetings	Project reference group	Online and in person meetings to review project progress and seek input to the work plan.

Outcomes

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
An informed industry aware of export opportunities and requirements	Avocado Export Strategic Investment Plan 2017-2021 - By 2023, over 10% of production will be exported to markets where customers have a willingness and capacity to pay a premium for Australian avocados.	The project aimed to enhance the industry's knowledge and capabilities by offering thorough training programs and distributing regular market intelligence reports. These efforts kept industry participants well-informed about export opportunities, market conditions, and compliance requirements.	Circulation of weekly, monthly, and annual market intelligence reports; Involvement in export regional forums; Record of export and market access emails distributed.
Evidence of maintained and increased export knowledge, attitudes, skills, and aspirations (KASA) within the Australian avocado industry leading to practice change	This result aligns with the project's goal to enhance the capacity and capability of the Australian avocado industry, ensuring that stakeholders are fully equipped with the knowledge, skills, and mindset needed to successfully navigate and excel in export markets.	The project aimed to elevate the export knowledge, attitudes, skills, and aspirations (KASA) of the Australian avocados industry through various educational and capacity-building efforts. It delivered comprehensive regional forum and protocol training programs to equip stakeholders with practical knowledge and skills, while regularly sharing market intelligence and best practices to keep them informed and engaged. Ongoing learning initiatives were also introduced to promote a culture of continuous improvement and adaptability to emerging challenges and opportunities.	Protocol checklist, agenda of workshop forums, including attendance records and participant feedback are on record. Presentations were delivered by invitation from DAFF on best practices and by DAFF auditors on export compliance requirements with support from ATGA. Additionally, revisions to pest monitoring and record-keeping practices were addressed. Much of this work is conducted annually.
Utilisation of market access pathways by growers and exporters	Strategy outcome is to open new export markets, and maximise their potential. Through this project new export markets opened were Japan, Thailand and India using conditional non-host pathway.	The utilization of new pathways by growers and exporters is reflected in registration participation, and participation in new market activation marketing and promotion. The pathway for Japan and Thailand is CNH for Mediterranean fruit fly and	Export volumes to these three markets since opening and a total contribution close to 15%. Japan – 1,377t (WA only) Thailand – 662t (WA only) India – 523t (Australia)

		only for Western Australia (South Australia lost area freedom due to Q-fly outbreak) and India is CNH for Q-fly for all Australia.	
Improvements in export supply chain connectivity (relationships with exporters, importers, distributors, and retailers in export markets) and industry's ability to utilize these export supply chains	This result aligns with the fund's objective to boost the efficiency and effectiveness of the export supply chain while improving market access for the Australian avocado industry.	The project aimed to improve the export supply chain by provide export capabilities, showcasing supply chains and build a strong presence with trade partners. The key activities are export regional forums and study tours. By concentrating on these areas, the project ensured that Australian avocados achieved increased market shares and that the supply chain operated efficiently and cost-effectively.	Export volume has increased more than 600% in the past 3 years. Feedback from exporters highlights improvements in the supply chain and market access.
Effective management of export related risks		The project tackled export-related risks by developing a comprehensive emergency response plan and offering risk management advice. These efforts helped the avocado industry prepare for and respond to potential disruptions, ensuring continuity and stability.	Development of a risk management plan; input from avocado growers and exporters on the effectiveness of the implemented risk management strategies; and timely dissemination of information to growers and exporters through emails.
New market access protocols achieved	The strategy and fund have been very focused on achieving new R&D outcomes to protocol support opening new markets.	DAFF used the CNH to negotiate new market access to Japan and Thailand for WA and for only med-fly, and CNH for India for all Australia. AV20004 worked with DAFF to ensure the protocols were commercially workable. The market access business case and	Japan, Thailand, India

		application been submitted to IMAAP pool for South Korea, Taiwan and Vietnam support by this project.	
Increased volumes and value of Australian avocado exports		This project aimed to maintain existing export markets and explore new opportunities by coordinating trade missions and promotional efforts. By establishing connections with trade partners, positive responses been received. Strong in-market relationships were developed to maintain ongoing demand and support for Australian avocados.	. Australian avocado export volumes in 2023/24 were 21,979 tonnes, which was a 106 per cent increase compared to last year valued at AU\$96.11 million. Unit prices were 21 per cent lower at AU\$4.37 per kg. Australian avocado exports accelerated in 2023/24 influenced by a domestic supply surplus and aggressive competitive pricing in key markets of Hong Kong, Singapore and Malaysia. Strong relationships were formed, and networking connections were created with overseas audiences and government agencies such as TIQ. .

Monitoring and evaluation

Given the significance of AV20004, Hort innovation engaged an independent party (Ag Econ) to provide an in-depth evaluation of the project including an impact assessment. Below are some insights from the report.

The Avocado market access and trade development (AV20004) project delivers a variety of initiatives to support the Australian avocado industry obtain and realise new market access opportunities, and resources and engagement to support avocado growers increase export capabilities to become 'export ready'. The project is funded through the Hort Innovation Avocado Fund using the avocado Research and Development (R&D) levy and contributions from the Australian Government. The project commenced in February 2021, will conclude in February 2024 and has been delivered by Avocados Australia Limited (AAL).

Ag Econ was engaged by Hort Innovation in July 2023 to complete an end-of-project Evaluation for AV20004. The Evaluation was commissioned to determine the extent to which the project's delivery (activities and outputs) supported achievement of its intended outcomes and impacts by considering Key Evaluation Questions regarding effectiveness, efficiency, process appropriateness and relevance.

The Evaluation was based on a combination of document review and targeted interviews with 16 industry and project stakeholders.

Summary of Evaluation findings

Informed by evidence from all stakeholders, the Evaluation found that project delivery achieved the intended project outcome of building export industry capability and capacity to realise demand creation opportunities in export markets. The project was viewed favorably across all industry stakeholder groups (growers, packers, marketers, exporters, government), performing a critical role that is enabling the industry to diversify demand creation opportunities, amid growing production volumes that would otherwise be surplus to domestic market requirements.

An impact assessment identified that seven economic and social impacts have been supported for the industry and the wider community as a result of delivery. The primary economic impact Increased capacity to export avocados (protocol and non-protocol markets) increases share of Australian avocado industry realising price premiums relative to the domestic market was found to generate a net benefit of \$8.3 million for industry over the project period and out to 2025-26

The Evaluation confirmed the rapidly changing nature of market access and trade development required a project delivery approach that could pivot and respond to short term opportunities. While flexible and collaborative intent has been supported through project delivery, underlying project management structures limited this approach and have emerged as a challenge influencing an effective delivery model moving forward.

The capacity to access and supply avocados competitively and profitably into diversified export markets will determine the level of ongoing level of growth for the Australian avocado industry as the maturing domestic market reaches saturation. Therefore, ongoing delivery of market access and trade development investment should be prioritized to further realise new protocol market opportunities that can be leveraged by a growing share of 'export ready' avocado industry stakeholders.

The Evaluation identified the following recommendations to support future iterations of investment in market access and trade development for the avocado industry.

Recommendations

- 1. Ongoing Market Access Research:**
Continuously provide support for research into the requirements of various countries to secure and maintain market access.
- 2. Protocol Registration and Efficiency Improvement:**
Continue supporting protocol registration efforts in collaboration with DAFF and explore opportunities to enhance efficiency where possible.

3. **Reinforce Responsible Chemical Use and Compliance with MRLs:**
Emphasize to growers the critical importance of proper chemical use and adherence to Maximum Residue Limits (MRLs).
4. **Expand Quality and Handling Education Internationally:**
Strengthen efforts to educate international audiences—such as importers, retailers, and other stakeholders across the supply chain—on avocado quality and handling best practices.
5. **Enhance Export Capabilities and Capacities:**
Collaborate with growers and exporters to further develop export capabilities through targeted activities designed for a variety of export destinations.
6. **Provide Timely Industry and Market Insights to Overseas Audiences:**
Offer up-to-date information and support to importers and retailers on the latest industry trends, crop forecasts, and trade developments.

Refereed scientific publications

N/A

Journal article

N/A

Whole book

N/A

Chapter in a book or paper in conference proceedings

N/A

References

N/A

Intellectual property

No project IP or commercialisation to report.

Appendices

Appendix 1 - Export Development Events

Domestic Events

HEICC Meetings

Date: 16 March 2022

Location: Canberra

Participants: Flora Zhang (AAL – Export Development Manager)

Date: 6 July 2022

Location: Canberra

Participants: Flora Zhang (AAL – Export Development Manager)

Date: 12 October 2022

Location: Canberra

Participants: Flora Zhang (AAL – Export Development Manager)

Date: 14 August 2024

Location: Canberra

Participants: Flora Zhang (AAL – Export Development Manager)

Export PRG Meetings

Date: 9 & 10 August 2022

Location: Canberra

Participants: John Tyas (AAL - Chair), Tom Silver (AAL – TNR Director), Daryl Boardman (AAL – SQ Director), Antony Allen (Marketer), Cormac te Kloot (Grower, Packer, Marketer & Exporter), Brent Chambers (Grower, Packer & Exporter), Jennie Franceschi (Exporter), Josh Franceschi (Packer, Marketer & Exporter), Mimi Doan (HIA), Troy Agosti (HIA), Flora Zhang (AAL – Export Development Manager)

Agendas:

[Agenda Avocado Export PRG Meeting.docx](#)

[Agenda Avocado Market Access Advisory Group Meeting.docx](#)

Date: 8 February 2023

Location: Brisbane

Participants: John Tyas (AAL - Chair), Daryl Boardman (AAL – SQ Director), Antony Allen (Marketer), Cormac te Kloot (Grower, Packer, Marketer & Exporter), Jennie Franceschi (Exporter), Josh Franceschi (Packer, Marketer & Exporter), Lucy Philip (AAL – CQ Director) Matt Kleyn (AAL – NQ Director) Mimi Doan (HIA), Troy Agosti (HIA) , Flora Zhang (AAL – Export Development Manager)

Agenda: [Agenda PRG Meeting.pdf](#)

Export Regional Forums

Central Qld Export Regional Forum

Date: 4 March 2022

Location: Bundaberg, Qld

Number of participants: 37

Number of growers, packers, and marketers: 25

Agenda: [Avocado Export Regional Forum CQ Agenda.pdf](#)

Evaluation survey summary:  [Evaluation survey summary - CQ forum.xlsx](#)





Western Australia Export Regional Forum

Date: 10 May 2022

Location: Manjimup, WA

Number of participants: 30

Number of growers, packers, and marketers: 22

Agenda: [WA Export Regional Forum Agenda.pdf](#)

Evaluation survey summary:  [Evaluation survey summary - WA forum.xlsx](#)



South Australia Export Regional Forum

Date: 13 May 2022

Location: Loxton, SA

Number of participants:14

Number of growers, packers, and marketers:12

Agenda: [SA Export Regional Forum Agenda.pdf](#)

Evaluation survey summary:  [Evaluation survey summary - SA forum.xlsx](#)



Central NSW Export Regional Forum

Date:15 June 2022

Location: Port Macquarie, NSW

Number of participants: 23

Number of growers, packers, and marketers:15

Agenda: [Avocado Export & Disease Management Workshop Agenda.pdf](#)

Evaluation survey summary:  [Post workshop survey.xlsx](#)



North Qld Export Regional Forum

Date: 21 July 2022

Location: Atherton, Qld

Number of participants: 27

Number of growers, packers, and marketers:18

Agenda: [NQ Export Regional Forum Agenda.pdf](#)

Evaluation survey summary: [Export regional forum feedback sheet Atherton QLD 2022.xlsx](#)



South East QLD Export Regional Forum

Date: 24 October 2023

Location: Highfields, QLD

Number of participants: 52

Number of growers, packers, and marketers: 32

Agenda:  [SQ Export Regional Forum Agenda.pdf](#)

Evaluation survey summary:  [SEQ Export Forum Survey Feedback.xlsx](#)



Central Qld Export Regional Forum

Date:18 Aug 2023

Location: Bundaberg, Qld

Number of participants: 47

Number of growers, packers, and marketers: 24

Agenda: [CQ Export Regional Forum Agenda.pdf](#)

Evaluation survey summary: [Export Regional Forum Feedback Sheet Central Queensland 2023_Final.xlsx](#)



North Qld Export Regional Forum

Date: 24 October 2024

Location: Atherton, Qld

Number of participants: TBC

Number of growers, packers, and marketers: TBC

Agenda: TBC

Evaluation survey summary: TBC

Farm Visits

Central Qld

Date: 17 & 18 October 2022

Number of Avocado growers visited: 5

Participants: Flora Zhang (AAL – Export Development Manager) & Hayleigh Dawson (AAL – Market Development Manager)

Produce Market Visits

Sydney Market Visit

Date: 1 & 2 December 2022

Participants: Flora Zhang (AAL – Export Development Manager) & Hayleigh Dawson (AAL – Market Development Manager)

Description: Visiting Sydney wholesalers/exporters

Melbourne Market Visit

Date: 12 October 2023

Participants: Flora Zhang (AAL – Export Development Manager)

Description: Visiting Melbourne wholesalers/exporters

Austrade Meeting

Date: 11 October 2023

Location: Melbourne

Participants: Flora Zhang (AAL – Export Development Manager)

AHEIA AGM

Date: 12 October 2023

Location: Melbourne

Participants: Flora Zhang (AAL – Export Development Manager)

International Events

Inbound Missions

Time in Motion Study for East Coast Avocados to Japan

Date: 30 June & 1 July 2022

Location: Bundaberg

Participants: Flora Zhang (AAL – Export Development Manager)

Taste of Queensland – South East Asia Delegation

Invitation: [Taste of Queensland Invitation.pdf](#)

Date: 8 to 11 May 2023

Location: North & South East Queensland

Participants: 13 (AAL Staff - Flora Zhang – Export Development Manager) & Buyers from Hong Kong, Malaysia, Singapore, GGC



China Delegation – Bundaberg

Date: 26 June 2024

Location: Bundaberg

Participants: AAL Staff (Flora Zhang – Export Development Manager & Matt Kleyn – Deputy Chair) & Chinese Importers (Riverking)



Taste of Queensland – Indian Delegation

Program: [TOQ Inbound India Avo mission 2024 A4 v5.pdf](#)

Date: 14 to 19 April 2024

Location: Queensland

Participants: Indian Buyers

Profile of participants: [TOQ Delegate profile India Avo mission 2024 A4 v5.pdf](#)



Inbound Mission to WA – South & South East Asia, North East Asia & Middle East Delegation

Date: November 2024

Participants: Retailers, Importers & Wholesalers from India, Thailand, Japan & GCC

Outbound Missions

Asia Fruit Logistica & South East Asia Market Visits

Itinerary – [Southeast Asia Avocado Market Visits Itinerary Updated.docx](#)

Asia Fruit Logistica & Market Visits

Date: 6 to 7 September 2022

Location: Hong Kong

Participants: 23 (Avocados Australia delegation – AAL Staff, DPIRD, Growers & Exporters)



Kuala Lumpur, Malaysia – Networking Event & Market Visits

Date: 7 November 2022

Event: Networking Event at EQ Hotel

Participants: 50 (AAL Staff, Growers, Exporters, Retailers & Importers)

Date: 8 November 2022

Event: Market visits in Kuala Lumpur (full day)

Participants: 21 (Avocados Australia delegation – AAL Staff, Hort Innovation, Growers & Exporters)



Singapore – Networking Event & Market Visits

Date: 9 November 2022

Event: Market visits in Singapore (half day)

Participants: 21 (Avocados Australia delegation – AAL Staff, Hort Innovation, Growers & Exporters)

Date: 10 November 2022

Event: Networking Event at Grand Copthorne Waterfront Hotel

Participants: 40 (AAL Staff, Hort Innovation, Growers, Exporters, Retailers & Importers)



Japan Supermarket Trade Show

Date: 15 to 17 February 2023

Participants: 7 (Avocados Australia delegation – Growers & Exporters)



Gulfood & Avocado Middle East Study Tour

Date: 19 to 28 February 2023

Locations: Dubai, UAE & Riyadh, Saudi Arabia & Doha, Qatar

Participants: 10 (Avocados Australia delegation – AAL Staff, Hort Innovation, Growers & Exporters)

Itinerary: [GCC and HK Study Tour Itinerary.pdf](#)



Hong Kong Australian Shepard Avocado Workshop & Market Visits

Itinerary: [GCC and HK Study Tour Itinerary.pdf](#)

Date: 2 to 3 March 2023

Event: Market Visits

Participants: 10 (Avocados Australia delegation – AAL Staff, Hort Innovation, DAF, Growers & Exporters)

Date: 3 March 2023

Event: Hong Kong Australian Shepard Avocado Workshop

Location: Grand Hyatt Hong Kong

Participants: 38 (AAL Staff, Growers, Exporters, Retailers & Importers)





Australian Avocados Thailand Launch & Stores Visit

Itinerary: [Australian Avocados program 27-28 Sept 23.pdf](#)

Date: 27 September 2023

Event: Australian Avocados Thailand Launch – Sukhothai Hotel

Participants: 107 (Embassy, Austrade, DAFF, DFAT, Press, AAL Staff, Growers, Exporters, Importers & Retailers)

Agenda: [Australian Avocados Thailand Launch Agenda.pdf](#)

Launch Summary Report: [Summary report - Event Australian Avocados.pdf](#)

Date: 27 to 28 September 2023

Event: Market visits in Thailand

Participants: 12 (Avocados Australia delegation – AAL Staff, Growers & Exporters)

Market Visit Summary Report: [Thailand market visit summary - July 23.pptx](#)



MOU - Official Signing Ceremony - Introducing Australian Avocados to China

Date: 10 November 2023

Location: Park Hyatt Beijing

Participants: AAL Staff (John Tyas -CEO, Flora Zhang - Export Development Manager & Brad Rodgers -Chair) & Government Officials

Invitation: [10th Nov_SigningCeremony_China_Invitation.pdf](#)



Avocados Australia India Launch & Study Tour

Event: Avocados Australia Launch Trade Reception

Invite: [Australian Avocado Launch Reception Invitation.pdf](#)

Date: 9 May 2024

Location: Australian High Commission, New Delhi

Participants: 25 (Australian delegation, Government officials from Aust & India, Avocados Australia Ambassador (Brett Lee), Indian Importers & Retailers, Media)

Event: India Study Tour

Itinerary: [Avocados Australia Study Tour Itinerary 2024 with hotel & flights info.pdf](#)

Date: 7 to 15 May 2024

Participants: 16 (Avocados Australia delegation – AAL Staff, Hort Innovation, TIQ, Growers & Exporters)



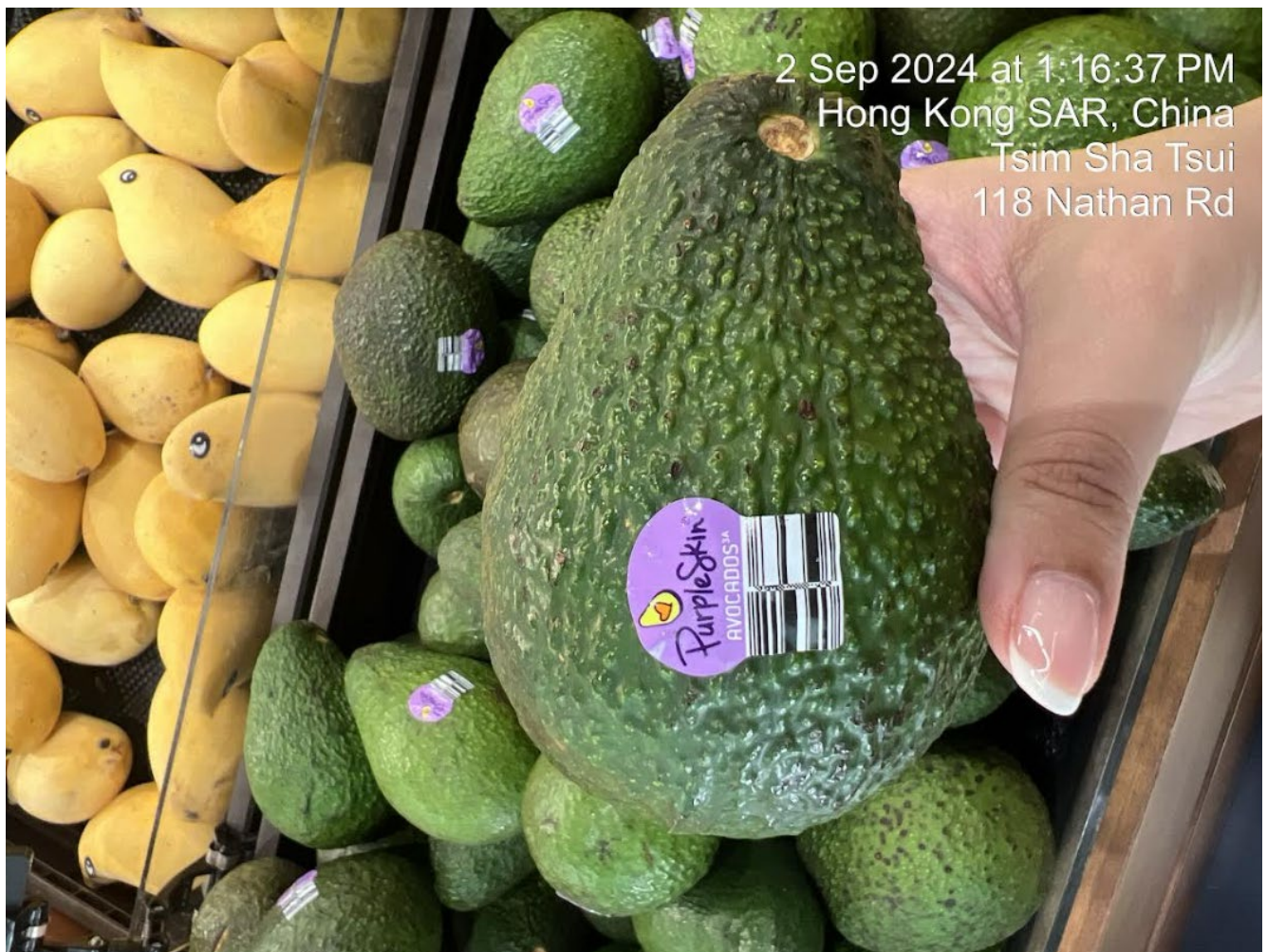
Hong Kong Evaluation Mission

Date: 2 to 6 September 2024

Itinerary: [Evaluation mission 2024 - HK Itinerary.docx](#)

3 Sep 2024 at 3:45:01 PM
Hong Kong SAR, China
Tsuen Wan
Wing Tai House, Fuk Loi Estate





Virtual Events

India Export Webinar - Preparing for India registration, audit & accreditation

Date: Friday, 19 January 2024

Description: This webinar aims to help growers and packhouses (based in QLD, NSW, VIC and SA) prepare to register and accredit their properties in preparation for exporting Hass avocados to India this season.

Participants: approx. 45

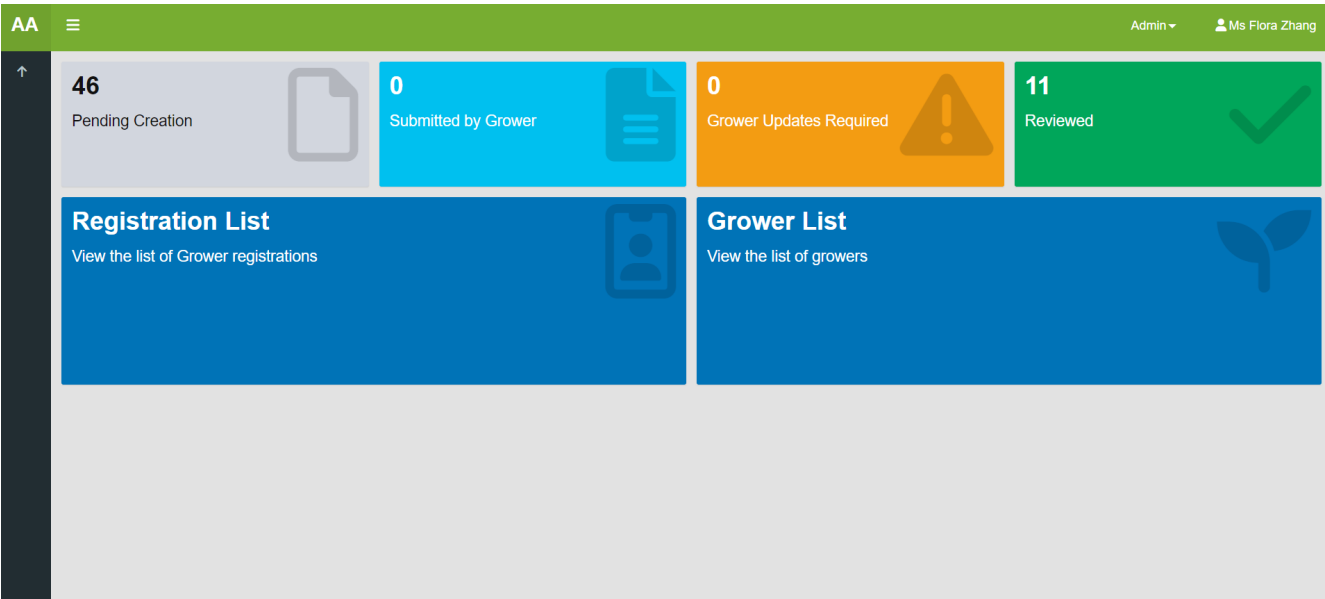
WA Export Registration & Accreditation Webinar

Date: Wednesday, 27 March 2024

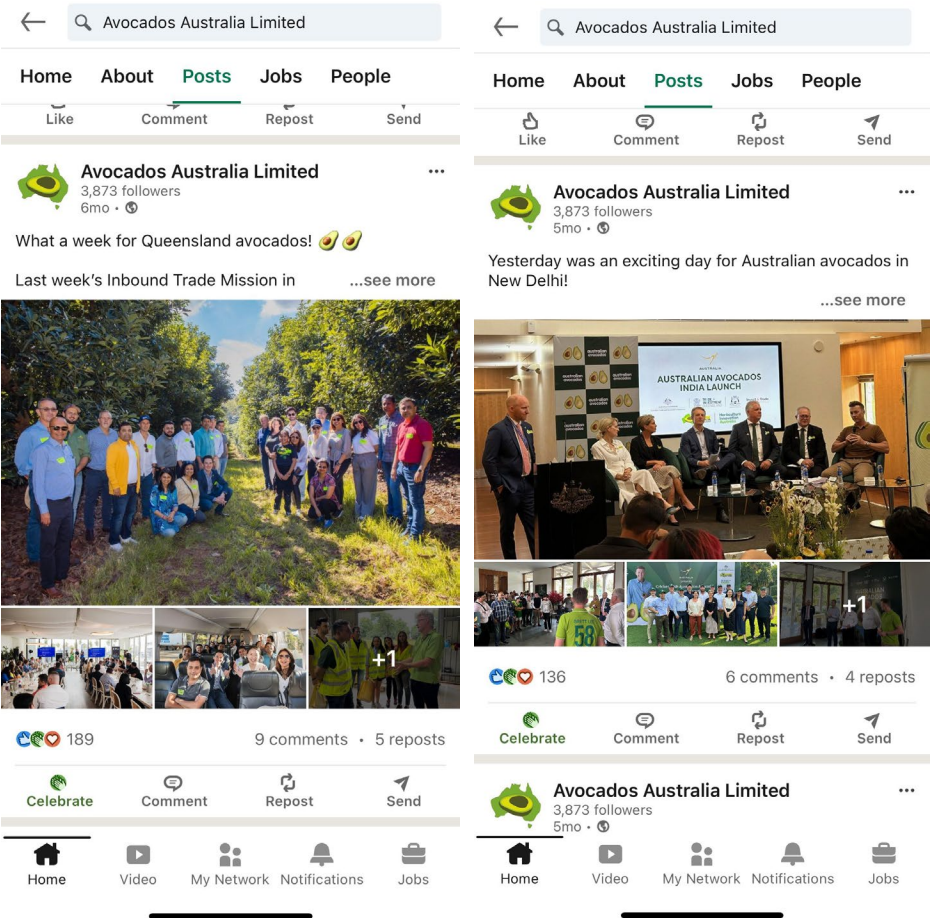
Description: The webinar will provide essential information on the 2024-25 season with the grower and packer exports to protocol markets requirements for Japan, Thailand, and India.

Participants: approx. 35

Appendix 2 – Extract of the export registration system



See Appendix 3 – Pick of the Communication examples



Appendix 4 – Extract of Export Articles in the Talking Avocados

YEAR	NUMBER OF PUBLICATIONS	TOTAL
2022	Summer: 4 Autumn: 5 Winter: 7 Spring: 7	23
2023	Summer: 8 Autumn: 7 Winter: 7 Spring: 11	33
2024	Summer: 9 Autumn: - Winter: 10 Spring: 12	31
Total:		87

AUTUMN 2022

— Export News —

CQ Export Regional Forum – The Exporting Edge

Growers, packers and exporters descended on Bundaberg on 4 March for Avocados Australia's CQ Export Regional Forum held at Bundaberg Rowers on the River in Bundaberg Central. An industry export overview and update was provided by John Tyan, CEO of Avocados Australia and this was followed by a presentation about Trade Investment Queensland from Joy Tang from Trade and Investment Queensland. The event provided "On the ground" insights from Trade and Investment Queensland Trade Commissioners from Singapore, Malaysia and Indonesia on the avocado category. The Malaysia, Singapore and Indonesia overviews provided a thorough outline of the avocado category in these overseas markets and showed retail displays and insights into these overseas markets. The event aimed to help boost Australian avocado exports and the majority of attendees said that the event has increased their intention to export avocados.

During the day a case study video was played to attendees that showed the Australian table grape industry's export journey. Like the Australian avocado industry, the Australian table grape industry had an over supply of grapes and they successfully worked on increasing their exports. The video outlined how they did it. The advice from the table grape growers/exporters to avocado growers is to get started early. The general message was that export is a long haul and requires commitment but it's worth it for growers in the end. The video can be accessed on the Best Practice Resource in the Library under "Export" look for the video title "Table Grapes Case Study".

Information about quality management for export was provided by Nod Ainsworth from Department of Agriculture and Fisheries. Providing a reliable supply of premium quality avocados to overseas markets is essential so Nod's overview held important messages for attendees.

In the afternoon after lunch a special session was dedicated to discussing future directions for exporting. Those who took part had a chance to provide input into discussions about overseas exporting prospects and hear more about the Export Strategy that's in development from Jenny Margittis from P2P who is working on the Export Strategy 2022-2026 (AV21000) project.

In all, this regional forum provided an excellent opportunity to hear the latest in export news and planning for the avocado industry. Avocados Australia intends to hold more Export Regional Forums around the country, the next one being held in Manjimup, Western Australia. Look out for email notices about the event.



John Tyan, CEO of Avocados Australia, provides an industry exporting overview.



Flora Zhang, Avocados Australia's Export Development Manager, talks about Avocado Market Access and Trade Development Project.

20 NEWS TALKING AVOCADOS AUTUMN 2022

— Export News —

Export Strategy 2022-2026 will impact your future



The updated long-term forecast suggests Australia's avocado production is expected to continue to increase to about 170,000 tonnes by 2026, more than double the 2020-21 crop. Finding a market for all this fruit is paramount and effort is underway to try to increase domestic consumption of avocados as well as increase exports (including opening new overseas markets). The current avocado export strategy (2019-2021) has served the industry well. Avocados Australia is now developing a new Export Strategy (2022-2026) to guide market development over the next five years. With changing supply and market conditions, this is a timely opportunity. The new Strategy will identify, assess and prioritise international market prospects for Australian avocados and identify the required R&D and investment to realise these prospects.

As part of the project, Australian avocado growers, exporters, researchers and other stakeholders are invited to register their interest to have the opportunity to take part in a range of consultation activities that are planned to help inform the final Strategy. This includes access to:

- Australian Avocado Export White Paper - review & comment (March-April 2022)
- Draft Export Strategy - review & comment (May-June 2022)
- Export Forums (WA and SA) (May 2022)

- Export Strategy Webinar (May 2022)
- Export Strategy presentation at Avo Connections (June 2022)

To date background work has been undertaken to understand current Australian avocado exports, where the best export opportunities are for Australian avocados, and what work is required to access and successfully build these markets. The project will assess more than 10 international markets to assess their feasibility, and consider any market access requirements and associated R&D. Market development and promotion requirements are also being considered.

So how will the Avocado Export Strategy help avocado growers manage the forecast over supply of avocados?

The Export Strategy will provide guidance so 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 Strategy will identify the best course of action to grow new markets that can cater for the rapidly increasing production volumes.

22 NEWS TALKING AVOCADOS AUTUMN 2022

Marketing Australian avocados internationally

Taste Australia campaign - Australian Avocados in Japan

The final report of the Taste Australia avocado campaign in Japan became available in March so we are excited to provide you with an overview of the activities that took place. Avocados are now very popular in Japan and they are enjoyed by Japanese families of all ages. Most of the avocados sold over the past few years in Japan have come essentially from Mexico.

The objectives of the Taste Australia avocado campaign in 2022-2023 season were:

1. To raise awareness towards consumers and trade partners (importers, intermediate wholesalers (jobbers), retail stores, and food service) around Australian Hass avocados
2. To inform the different stakeholders of the superior quality of Australian avocados and their pristine growing environment.

Trade Show

Included in the Taste Australia campaign was Trade Show participation. In cooperation with one of Japan's Australian avocado importers AINS, Australian Avocados took part in the Japan International Food Expo (held in Osaka on Nov 17-19 in 2021). Although held amidst the coronavirus pandemic, the three-day show attracted over 10,000 visitors from food related businesses around Japan. During the event, samples of Australian Hass avocados were distributed to interested guests in lidded containers. According to the demo staffers hired for the trade show, most visitors were surprised by the size of Australian avocados and the delicious and creamy taste. Many potential buyers commented on the fact that the fruits look beautiful inside and out, unlike avocados from other origins. Because the booth was on a

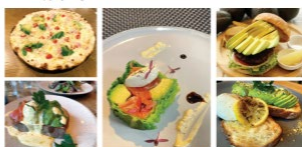
corner, there was a lot of traffic and many people stopped by for a taste. 561 fresh Australian avocados were handed out to interested visitors in lidded containers.

Food Service promotions

Food service promotions also took place in Tokyo. Fifteen privately held restaurants located in four Japanese prefectures participated in the Australian avocado promotions. The restaurants represented four prefectures, but were mainly concentrated in Yokohama, a major port city just south of Tokyo. Yokohama is one of the trend setting cities in Japan with a population of approximately 3.8 million. Each restaurant came up with unique culinary creations to showcase Australian Hass avocados at the height of the season. The promotion took place over two weeks and during that time a total of 2,036 Australian avocados were sold in 15 participating restaurant locations.

Tokyo Restaurant shows their love of Australian Avocados on Facebook & Twitter

A restaurant by the name of '64 Barrack Street' based in Tokyo showed their love for Australian avocados by preparing a number of



Fifteen privately held restaurants located in four Japanese prefectures participated in the Australian avocado promotions whereby they created culinary creations using Australian Hass avocados.



JPEX visitors who tried the Australian Hass avocados were surprised by the delicious and creamy taste.



Over 10,000 visitors attended the Japan International Food Expo.

The global avocado production lifted 12.5 per cent to 8.1 million tonnes in 2020 according to the FAOSTAT data. Mexico is the leading producer with 2.3 million tonnes followed by Colombia and Peru and together these producers account for 50 per cent of the global avocado production.

Global trade has been increasing at over 9.8 per cent per year over the last 5 years and in 2021 just over 1.0 million tonnes were traded internationally, or 2.5 million tonnes when adjusted for re-exports mainly in Europe. This means that around 37 per cent of production is traded internationally, one of the highest proportions to trade ratios for any fruit or vegetable.

Mexico is the world's largest producer and exporter and lifted export trade by 25 per cent to 1.2 million tonnes of which over 80 per cent was across the border to the United States. Peru lifted 31 per cent to 541,000 tonnes while Chile was up only 1 per cent to 98,000 tonnes and falling over the longer term influenced by weather and production issues. Peru and Mexico have the strongest influence on driving trade into North Asian markets of interest to Australia.

Despite the COVID19 impact on trade and logistics, demand for avocados kept increasing in North America, Europe and Asia. North America and Europe saw trade at around 1.2 million tonnes each while trade to Asia, mostly from Mexico and Peru increased 19 per cent last year to 176,000 tonnes or 6 per cent of the global trade.

The growing demand for avocados in North Asian markets is driven by exporters from Mexico, Peru and Chile into Japan, South Korea and China. Australia and New Zealand have

had a stronger influence on growing trade into Southeast Asian markets particularly Singapore and Malaysia, which should increase.

Avocado trade in Asia has started to ramp up since 2014 when major exporters gained access and invested in promoting avocados in China and South Korea. These are the fastest growing markets although Japan is

the largest importer and has been importing avocados for over 20 years. Japan dipped 4 per cent last year. Hong Kong has doubled though much of this goes through to China from Peru.

The Southeast Asian markets where Australia has a strong presence are increasing rapidly off smaller bases. Australia has driven the trade into Singapore 15 per cent higher while

	Total imports			1 yr change		5 yr CAGR		Australia	market share
	Tonnes							Tonnes	
Japan	76,694	-4%	6%					90	0.1%
China	36,856	34%	3%					-	-
Hong Kong	29,532	100%	9%					4,320	14.6%
South Korea	17,113	30%	30%					-	-
Singapore	6,380	15%	11%					3,046	47.7%
Malaysia	4,560	33%	18%					2,042	44.8%
Thailand	2,083	17%	37%					-	-
Taiwan	1,417	20%	24%					-	-
India	888	112%	80%					-	-

Source: ITC TradeMap based on import data. Fresh Intelligence analysis

Table 1. Avocado imports by market in Asia and Australia's market share.

	Consumption	Per Cap	Trend	Pop
	Tonnes	kg per person	5 years CAGR	Million
Hong Kong	11,542	1.54	20%	7
Singapore	5,976	1.05	11%	6
Japan	76,694	0.61	6%	126
South Korea	17,313	0.33	30%	51
Malaysia	4,330	0.13	18%	32
Taiwan	1,415	0.06	24%	24
Thailand	1,922	0.03	37%	70
China	36,845	0.03	3%	1,402
India	853	0.00	50%	1,380

Source: ITC TradeMap, World Bank, Fresh Intelligence analysis

Consumption + Production + Imports minus exports

Table 2. Per capita consumption of avocados in Asia.

TALKING AVOCADOS WINTER 2022

NEWS

17

Avocado Export Strategy 2022-2026 presented to Industry

Avocados Australia is striving to increase exports of Australian fresh avocados to overseas markets. As part of this effort work was underway to produce the Export Strategy 2022-2026. A draft was completed and presented at a Webinar on 3 June that provided around twenty interested members of the Australian avocado industry with the chance to hear Margerita (P2P Business Solutions), Noel Skidm (Consultant), Wayne Prowse (Fresh Intelligence Consulting) and Garry Genscher (G. Genscher & Associates).

The Avocado Export Strategy was also detailed at Avo Connections, Avocados Australia's annual industry event that took place on 4 June at the Brisbane Convention and Exhibition Centre. John Tyas made the presentation about the Avocado Export Strategy 2022-2026 to a gathering of over one hundred members of the Australian avocado industry. In his presentation John outlined the strategy's objective, that by 2026 Australian avocado exports will reach at least 20,000 tonnes at sustainable pricing levels. He also provided the details about the key strategy areas which covered, 1) Market Access and MRF Management, 2) Export Supply, 3) Export demand and 4) Capacity building.

Interested industry members were invited to provide their comments and feedback about the strategy by 10 June.

Avocados Australia would like to thank those who contributed to the Avocado Export Strategy consultation process.

Our thanks also go to the Project Reference Group members: Anthony Allen (Avokation), Cormac de Kloet (Costa Group),

Sophie Cremaschi (The Avocado Collective), Joe Lyons (Lyons Farming), Joe Sains (AHEIA), Mimi Doan, and Sue Viana (Hort Innovation).

Avocados Australia would also like to thank the export strategy team: John Tyas (AAL), Flora Zhang (AAL), Jenny Margerita (P2P Business Solutions), Noel Skidm (Consultant), Wayne Prowse (Fresh Intelligence Consulting) and Garry Genscher (G. Genscher & Associates).

A copy of the Avocado Export Strategy 2022-2026 is now available from the Best Practice Resource (BPR) online. To access it log on to the BPR then click on the "Library" (look at the top menu) then click on "Export".

For those of you who would like to know more contact Avocados Australia at 07 3846 6566 or email export@avocados.org.au

Acknowledgement

The development of the Avocado Export Strategy 2022-2026 was undertaken as part of the Avocado Export Strategy 2022-2026 (AV2026) project. This project has been 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.



From the left, Jenny Margerita (P2P Business Solutions), John Tyas (CEO Avocados Australia) and Flora Zhang (Export Development Manager, Avocados Australia) at the AAL offices taking part in the Avocado Export Strategy 2022-2026 Webinar on 3 June.



John Tyas, CEO of Avocados Australia, presents the Avocado Export Strategy at Avo Connections.

22 NEWS TALKING AVOCADOS WINTER 2022

2021-22 Australian Avocado Export/Imports Update

By Wayne Prowse, Fresh Intelligence Consulting

Australian avocado exports accelerated in 2021/22 influenced by a domestic supply surplus and aggressive competitive pricing in key markets of Hong Kong, Singapore and Malaysia.

The export volumes reached 11,626 tonnes, which was 268 per cent higher than 2020/21 and valued at AU\$52.05 million. Unit prices were 35.9 per cent lower at AU\$4.48 per kg.

Hong Kong was the largest export destination and accounted for 46 per cent of all export volumes followed by Singapore with 31 per cent share and Malaysia 19 per cent. Trade to Japan was 106 tonnes or 0.9 per cent share of export volumes.

Exports from Queensland increased 163 per cent to 5,549 tonnes mostly in the March to June period. Western Australia increased 10 x fold to 2,566 tonnes (Sept to Feb). New South Wales increased 278 per cent

to 2,194 tonnes while Victoria lifted 332 per cent to 926 tonnes.

By month, the exports were much higher than the previous year for every month though by May and June the levels were closer to the highest levels of the previous year.

Asian markets imported 158,000 tonnes of avocados from all sources in 2021, which was 13 per cent more than the previous year and a 9 per cent increase per year over 5 years. Japan remained the largest importer in Asia with 48 per cent share, importing mostly from Mexico though declined 3 per cent in 2021, partially due to supply productivity constraints in Mexico.

China had been the growth driver from zero to 4,000 tonnes by 2018 though reached 41,000 in 2021 and has remained around 30 - 45,000 tonnes since 2016. South Korea has emerged as a key importer lifting 30 per cent

to over 17,000 tonnes in 2021 and maintaining 30 per cent growth per year over 5 years.

Australia now holds over 65 per cent share of the Malaysian and Singapore markets, which combined have a 7 per cent share of all avocado imports by Asian region.

Globally 2.9 million tonnes of avocados were exported in 2021/22 including 630,000 tonnes from Europe that are mostly resupplied volumes from Latin America. The result was just 0.5 per cent higher than the previous year influenced by supply implications in Mexico and a short period in February when the US banned Mexican avocado imports.

From July to June 2022 there were 12,640 tonnes of avocados imported to Australia worth AU\$43.08 million, which was 55 per cent below the previous season. Unit values were 68 per cent lower at AU\$3.41 per kg.



22

TALKING AVOCADOS SPRING 2022

Exports have achieved a 268% increase in 2021/22

Flora Zhang, Avocado Australia Export Development Manager

We now have our 2021-22 export results and the total volume exported has dramatically increased when compared to the previous period. Total volume of Australian avocados exported reached 11,626 tonnes (valued at AU\$52.05 million) compared to 3,555 tonnes in 2020/21.

This is a positive result and is a step in the right direction if we are to be competitive in the global market and achieve our target volume (20,000 by 2026).

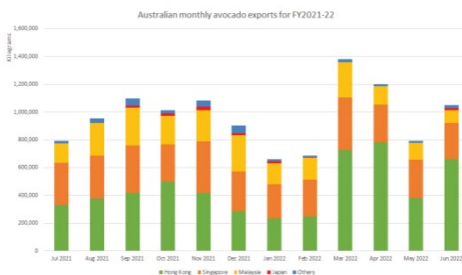
In FY21-22, Hong Kong was the largest export destination and accounted for 46 per cent of all export volumes followed by Singapore with 31 per cent share and Malaysia with 19 per cent (see the graph provided). Trade to Japan was 106 tonnes or 0.9 per cent share of export volumes.

Results are already being achieved with the implementation of our Avocado Export Strategy 2022-2026. The avocado-led international marketing activity is being focused on market access and growing market share in existing trading

markets. I recommend that you read the "Marketing Aussie avocados internationally" article located in the Marketing section of this magazine for information on where the marketing effort is being directed in our overseas markets.

A special focus has been directed to marketing to Japanese consumers in line with our aims to increase exports in that market given that Japan is the largest avocado importing country in Asia and our competitors have a strong footprint in that market.

In my recent discussions with growers and packers I am finding there is great interest in exporting. Those who are gearing up to export are conducting the necessary planning. Exporting requires that you plan at least six months ahead. Given our forecasts for record volumes in the coming years many growers will need to prepare and plan for exporting a significant proportion of their fruit. Our Export Regional Forums rolled out in each region provided valuable insights to growers and packers. In 2023/24, we are planning to have a series of export regional forums in each region



TALKING AVOCADOS SPRING 2022

NEWS

23

Avocados Australia Strategic Plan 2022-2026

Earlier this year the Board developed Avocados Australia's Strategic Plan for 2022-2026. They outlined four industry priorities and the strategies for delivering on those priorities. Avocados Australia's Vision is for a globally competitive and trusted Australian Avocado Industry. Our Purpose is to support Australian growers to become world leading sustainable producers.

Below is a summary of Avocados Australia's Strategic Plan 2022-2026 which is already being implemented. The Board is confident that it will help guide the organization in the coming years and deliver on the areas of most concern to the Australian avocado industry.

The board also developed operational priorities and strategies for the organization. A summary of these is presented on the next page.

Avocados Australia Strategic Plan 2022-2026

Vision - A globally competitive and trusted Australian Avocado Industry
Purpose - Supporting Australian growers to become world leading sustainable producers

Priority 1. Increase domestic consumption of Australian avocados to at least 150,000t by 2026 at profitable farm gate prices Strategies 1. Encourage consistent supply to the domestic market 2. Support domestic retailers to grow Australian avocado sales 3. Drive an increase in the frequency & volume of Australian avocado consumer purchases 4. Drive increased sales of Australian avocado through the food service sector 5. Support processing and value adding opportunities	80% Growth in domestic consumption of Australian avocados at profitable farm gate prices
Priority 2. Increase export volumes to at least 20,000t by 2026 at profitable farm gate prices Strategies 2.1 Grow existing high priority international markets 2.2 Facilitate access to new priority international markets 2.3 Build commitment, capability, and capacity of supply chain participants for international market growth	80% Growth in export volumes at profitable farm gate prices
Priority 3. Improve industry productivity and quality to increase global competitiveness Strategies 3.1 Support growers to make good business decisions 3.2 Develop best practice guidelines for the industry through focused R&D 3.3 Drive adoption of best practice and innovation throughout the supply chain	80% Increase in proportion of avocados at domestic retail level with <15% internal defects
Priority 4. Optimise the operating environment to support a sustainable and profitable industry Strategies 4.1 Proactively influence the legislation and regulation that affects the industry 4.2 Use innovative solutions to manage the risks & operational challenges affecting growers 4.3 Measure & report key metrics that support business & industry planning 4.4 Support a consistent, reliable, productive labour force	80% Maintain high industry satisfaction levels with AAI performance

TALKING AVOCADOS SPRING 2022

NEWS

29

MARKETING UPDATE

By Anna Peters, Avocado Australia

Three-year marketing plan work underway

Avocado Australia continues to work with Hort Innovation on the delivery of the industry's three-year marketing strategy, which was presented for advice on the 20-21 of October at the Marketing Strategic Investment Advisory Panel (SIAP). Hort Innovation has undergone a number of changes in order to better consult and meet the needs of industry. For almost a year now, we have been working with the two General Managers of Marketing. During this time, a new collaborative planning process was established and implemented with the aim to build more data and insight led marketing strategies and investment plans.

Hort Innovation has been embarking on a new marketing strategy planning process in time for the FY23-26 planning cycle. Workshops were held in Sydney on the 16-17 August where

industry marketing representative attendees included:

- Australian Produce Partners
- Avocadon
- Delivery Orchard
- Costa Avocados
- Green Skin Avocados
- Simpson Farms
- The Avocado Collective
- Avocado Australia
- Hort Innovation Marketing Team

By engaging in this collaborative process marketing plans will better meet the needs of industry and consumers. At the workshop 12 facts were discussed and will be taken into account in the marketing planning:

1. Currently 9% of supply is exported.
2. Food service is 24% and likely to grow.
3. There is scope to grow penetration, especially monthly.
4. Salience is low versus other fruit/veg

5. Light buyers only purchase 36 per year.
6. Perform on core needs, plus a strong advantage in health & nutrition.
7. Versatility across occasions is an advantage versus other fruits.
8. 4/5 top barriers to choice are related to a poor experience.
9. Lack of confidence in how to use across user groups.
10. "Our Green Gold" is a strong creative campaign.
11. Campaign has strong recall versus norms.
12. AVOccasion is driving versatility, taste and making everyday meals better.

The key learnings discussed in the marketing planning workshops related to: export, light buyers, strong benefits, versatility, quality and food service. All of these areas have implications for the FY23-26 strategy.

Avocado: Key Learnings & Implications

Theme	Learning	Implications for FY23-26 strategy
Export	Export currently represents only 9% of Avocado production volume while the industry is forecasting significant opportunity into the domestic market over the coming years.	• Significantly increase focus on export markets. • Expand existing markets and build new ones. • Continue to drive preference for Australian fruit over imports with retailers.
Light buyers	Light buyers are a big opportunity for avocados. While 25% of households have purchased in the past 12 months, only 42% have purchased in the Feb. Light buyers buy 6 times (or less) heavy buyers at \$3.	• Increase penetration of light buyers by driving consideration. • Build the confidence of light/non-buyers via 6 education (on pricing, storage, usage) 11 inspiration (simple ways to use and consume).
Strong benefits	Avocado has clear benefits in being quick & easy (82%), tasty (82%) and healthy. Avocados (82%) which are the top 3 benefits consumers desire when purchasing fresh produce.	• Test and validate our campaign in delivering the most motivating benefit. • Reinforce our benefits in our claims and focus on our strengths.
Versatility	Avocado has a clear strength in all other fresh produce in its versatility with each meal having a fairly even spread of occasions (Breakfast 30%, Lunch 25% & Dinner 27%).	• Maintain breakfast as our main consumer (share we own against other veg but still has room to grow) while also growing our usage in lunch and dinner occasions to promote the versatility of avoc - easy way to add to everyday/meal occasions.
Eating experience	4 of the top 5 barriers to increased purchase for current consumers are related to product experience with avocado (light state of ripeness 23%, gone off quickly 27%, poor quality 20%, bruises easily 17%) and all core roles in other food and veg.	• Continue to educate growers, suppliers and retailers on how to improve quality at the Point of Purchase. • Continue to extend and simplify education materials and tips for consumers on how to handle and pick avocados.
Food service	Food service is growing, and it requires home usage.	• Review existing data, collate new data on Food Service and its segments. • Develop an implementation strategy and plan.

TALKING AVOCADOS SPRING 2022

MARKETING UPDATE

45

Marketing Aussie avocados internationally

By Anna Petrus, Avocado Australia

Singapore & Malaysia - Taste Australia campaign completed

The Taste Australia marketing campaign that ran in Singapore and Malaysia over the last six months just ended and the final report results are extremely encouraging. The campaign included paid media, YouTube advertising, social media support and community engagement (see timeline provided).

Television commercials

The television commercial spots that ran over 2 months from July to August 2022 worked effectively and reached a significant number of the target audience. The results of the MasterChef Australia TV advertisement considerably exceeded the initial KPIs, indicating a strong interest for the audience towards fresh produce (avocado) and Australia. The MasterChef program was exclusively aired on Lifetime TV Cable Channel for the Southeast Asia region and the commercial promoting Australian avocados reached over 4.4 million viewers on Season 14. The program featured in 14 countries across Asia, with over 10 million household subscriptions. The total number of video impressions achieved, up till 28 August, was 11,500,000. This will exceed the goal KPI of \$70,000. The total number of television commercial spots was 358. You can view the commercials from the Avocado Australia YouTube channel located at <https://www.youtube.com/avocadoaustralia>.



Campaign revised timeline

Schedule Summary

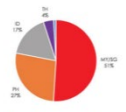
MasterChef Australia S14 on Lifetime Channel
Campaign dates: 17 July - 28 August 2022
Number of impressions: 11,500,000 (up to 28 August 2022)

Platform	Number of the spots	Number of the spots	Total
Prime Time Weekdays (5:00 - 5:30)	12	38	120
Prime Time Weekdays (5:30 - 5:55)	38	38	43
Prime Time Weekdays (5:55 - 6:30)	48	38	100
Prime Time Weekdays (6:30 - 7:00)	38	38	48
Extra spots	N/A	N/A	58
Total	140	200	298

Advertising schedule airing spots during MasterChef Australia in Asia

Data Intelligence Metrics

Results collected from the 27th of July to the 28th of August 2022 in the South East Asia Region.



MasterChef Australia S14 reached a total of 4.4 M Unique Viewers (all PTV) across South East Asia from 3rd of July to the 28th of August 2022.

Key SEA audience locations:

- 15% Indonesia
- 15% Philippines
- 15% Thailand
- 53% Other

MasterChef Australia advertising - Key SEA audience location.

48

MARKETING UPDATE

TALKING AVOCADOS SPRING 2022

- 2023 issues of *Talking avocados*

AUTUMN 2023

Export Market Analysis - India

By Wayne Prowse, Fresh Intelligence Consulting

Avocado Export Markets

The rise in Australia's avocado exports has gained new heights topping out at 10,976 tonnes in 2022. Not only did the volume increase 36 per cent after a record year in 2021, the unit value crept over A\$5.00 per kg allowing the overall value to increase 44 per cent to A\$53.1m. Additionally this was helped by a falling exchange rate against the USD as seen in Figure 1.

Hong Kong, Singapore, and Malaysia still accounted for 96 per cent of the export volumes however 309 tonnes were exported to Japan accounting for almost 3 per cent share lifting from 87 tonnes in the previous year. The remaining 1 per cent was shared across a dozen markets including Indonesia the Middle East and Pacific.

India

At time of writing the Indian government had just granted preliminary access to Australian avocados subject to a few remaining trial conditions. The exciting outcome announced when the Prime Minister Anthony Albanese was in India has surprised many across the industry and government at the speed

of reaching a successful outcome when other negotiations can take a decade or more. The rapid time frame and the reduction of tariffs under the new Australia-India Economic Cooperation and Trade Agreement (AIECTA) suggests that India is ready and wanting Australian avocados.

Despite the size of the Indian population (1.4 billion) the demand for avocados by India is in its infancy.

Production of avocados in India has seen trial plantings in Tamil Nadu, Kerala, Maharashtra, Karnataka in the south-central India lift to over 6,000 tonnes. Locally produced avocados have a fragmented supply chain with farmers collecting and delivering the avocados to distributors' warehouses, which are further distributed to retailers across the country. Local avocados are green skin avocados with low dry matter and they are used mostly in drinks.

New Zealand and Peru have been pioneering avocado import trade into India along with European exporters from Spain. New Zealand gained access in 2013, Spain in 2015 and Peru in 2016.

Tanzania is the latest new entrant since November 2021 and achieved 50 per cent market share in one year. Trade has lifted to 2,200 tonnes of imports in just over 5 years although this remains negligible in a market of the size of India. Therein lies both the opportunity and challenge.

Getting Australian avocados into the Indian market at an early stage of development is a huge opportunity for Australian growers providing that the marketing is right. The marketing fundamentals - *product, place, promotion, and price* come into play big time.

On product, we know that Australian avocados have a quality reputation where they are known, such as in Singapore and Malaysia where Australian avocados are market leaders. We do have to get avocados to India in the best possible condition as it is not simply an overnight truck ride.

A new study published by Hort Innovation noted a key growth driver was "rising public interest in being healthy, engaging in mindful eating and following dietary habits. The share of

Australian Avocado Exports - Annual Volume by key market Jan 2013 to Dec 2022

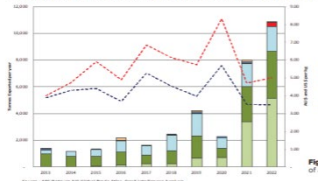


Figure 1: 10-year growth of avocado exports.

20

NEWS TALKING AVOCADOS AUTUMN 2023

Export News

Shepard avocados under the spotlight in Hong Kong

Flora Zhang, Avocado Australia Export Development Manager

As you may know, Avocado Australia is working hard to increase exports of Australian avocados and that means stepping up market development activities directed at increasing exports of both Hass and Shepard avocados to overseas markets. Included in AAL's Avocado Global Tour was a tour of Hong Kong markets and participation in the "Queensland Shepard Avocados Workshop & Networking Function". The Shepard workshop was held on 3 March at the Grand Hyatt and over 40 people attended the event which included leading Hong Kong retailers and importers. Australian growers and exporters were also present and directly engaged with retailers and importers. The workshop topics included: industry updates, supply chain management, marketing initiatives and interactive sessions with growers and exporters. This event raised awareness of Queensland Shepard avocados and their benefits. Importantly, AAL and the participants were able to build relationships with Hong Kong importers and retailers. The event also further worked to build the Australian avocado brand in Hong Kong. The executive chef Soren Lascelles at Grand Hyatt designed an avocado menu for our event showcasing a great mix between western dishes and oriental dishes using fresh Australian Shepard avocados.

My impression is that the importers and retailers recognise Shepard avocado as a unique offer to this export market. The Shepard workshop was well received, and both Shepard exporters and importers found value in taking part in the workshop. The workshop achieved good inroads and other events like this are planned for next year. The points of difference of Shepard, when compared with other varieties such as Hass, need to be communicated further. Further



Queensland Shepard Avocados Workshop & Networking Function participants.



Shepard avocados showcased by executive chef Soren Lascelles at Grand Hyatt.

engagement with Hong Kong retailers is also required. Consumers in Hong Kong are very spoiled with the best offerings from the world when it comes to fruit and vegetables, such as salad from France, white strawberries from Japan and so much more.

Avocado is widely used in food service outlets in Hong Kong. Shepard has a unique advantage in the food service market given the flesh doesn't turn brown after cutting. We visited one of the high-end supermarkets in the CBD during lunch time. The office

22

NEWS TALKING AVOCADOS AUTUMN 2023

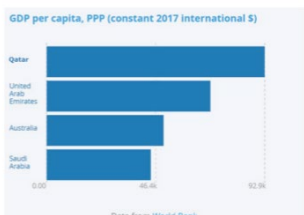
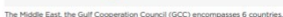
Access to India just 10 trial shipments away

Avocados Australia's Avocado Global Tour took place during 19 February to 1 March and gave participants (growers and exporters) the chance to visit produce markets, meet retailers and importers in Japan, the Middle East, and Hong Kong. The tour gave participants the chance to learn more about overseas markets and to generate export opportunities with first-hand information. Overall, the tour was a resounding success. In this article I will provide an overview of the Middle Eastern leg of the tour. In short, we learned that there are as yet untapped opportunities for Australian avocados in the Middle East.

If you are going to do business in the Middle East you need to know about the Gulf Cooperation Council or the GCC. The GCC is a regional, intergovernmental, political, and economic union comprising Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

Presently it encompasses a total area of 2,672,700 square kilometers and includes about 58.24 million people. The Middle Eastern leg of the Avocado Global Tour included visiting Dubai in the United Arab Emirates, Riyadh in Saudi Arabia, and Doha in Qatar. In the graph provided you will see the GDP per capita for the three countries the group visited in comparison with Australia. Qatar achieved GDP growth of 4.3% for 2021 followed by 3.4% for Saudi Arabia.

Here is a detailed overview of the activities that took place during the Middle Eastern leg of Avocado Australia's tour of the Middle East.



GDP per capita for Qatar, UAE, Saudi Arabia compared with Australia



In a joint statement delivered on Saturday 11 March, the Australian Prime Minister and the Prime Minister of India welcomed the 'finalisation of market access for Australian Hass avocados to India'. This event is momentous as Australian avocados officially gained entry into the Indian market, though as Richard says in his Market Access Update article, final approval is subject to the success of ten trial shipments. More information about this will be shared with industry via our email communications so watch out for our industry notices.

Avocados Australia commended the Australian and Indian governments on reaching this agreement in an Avocados Australia media release that went out on Monday 13 March and in a letter to the Minister of Agriculture, Fisheries and Forestry. Industry was also informed in an Industry Notice that went out the same day. John Tyas, CEO of Avocados Australia, believes market access to India will have a transformative effect on the Australian avocado industry.

"With the industry now capable of producing a strong supply of Hass avocados, having access to an overseas market such as India will be a 'game changer' for our industry," said John Tivas Chief Executive Officer of Avocados Australia.

"We acknowledge that final approval of the protocol will be dependent on 10 successful trial shipments, and we are very confident we can achieve that."

"The Australian Government has worked very hard and closely with industry to achieve a commercially viable and workable protocol that all Australian Hass avocado growers will be able to use."

"We believe there are great opportunities for Australian avocados in India and it is a market with enormous growth potential," said John Tyas.

Members of the Australian avocado industry interested in exporting avocados to India are recommended to read a recent international market research report that was prepared about the Indian market. This report was commissioned to provide market insights to support exporters and industry in developing the market once market access is available.

To access the report login to the Best Practice Resource and go to the "Library". Look under the "Export" heading and you will see the Market Research report for India listed below.

Trade activity aplenty in Japan, Middle East

By Troy Agosti, International Marketing Manager, Hort Innovation

Market access news could not be at a higher level pitch right now with the India market access announcement by Prime Minister Anthony Albanese, and Minister for Department of Foreign Affairs and Trade, Peter Dutton. The Hon. Murray Watt, Early March, Prime Minister Anthony Albanese visited Delhi, India, to meet with his counterpart, Prime Minister Narendra Modi. The visit highlighted many facets of the new Australia-India Economic Cooperation and Trade Agreement, and amongst the acknowledgements were the approvals of the Australian Government to provide market access for Australian hard mature Hass avocado, and Australia to provide market access for Indian avocado. Avocado to Australia is a priority for the Australian Government and the Hon. Peter Creaser and his DAFF team for their persistence, patience, and strategic negotiating skills to help give opportunity to Australia's avocado growers. The DAFF team will continue to access a burgeoning Indian consumer avocado market. AAL also thanks our Indian Agricultural Commissioner, Kirin Kulkarni, for his support in the market operational support to DAFF in the process of securing market access.

Although technical market access has been approved, there remains a final process of ten trial shipments that DAFF and industry must achieve together, to enable protocol gazettal, and prior to broader market access for industry. The ten trial shipments will be inspected on arrival and assessed under the necessary quarantine requirements in keeping with the draft protocol. DAFF and industry expect to begin these trials in June with good quality fruit from the Central Queensland region and moving to the Southeast Queensland region thereafter (pending the time taken for the ten shipments to be fulfilled and signed off by the India quarantine inspection authorities).

DAFF will require growers and packers wanting to export to India to undertake a necessary registration and audit process, similar to the Japan process, and to attain accreditation to enable approval for market access.

A fortnight prior to the Indian market access news, the Indian-Australian Business & Community Alliance (IABCA) Business Awards were held in Delhi. IABCA is an Australian based not for profit, but it was decided to have

the awards in India for the first time. The Avolution Group (an Australian marketer and exporter) won first place for Excellence in Innovation. We congratulate The Avolution team on this result.

Market access to Thailand remains in a holding position for Western Australia. DAFF and the Thailand Department of Agriculture have, in principle, completed the technical market access negotiations. However,

Grown in Good Nature - Japan

The avocado market in Japan has been growing considerably over the past few years – from approximately 10,000 metric tons (MT) in 2000 to 76,692 MT in 2021. In fact, avocados are the fifth most imported fresh fruit in Japan, just behind popular commodities such as bananas, pineapples, kiwifruits, and oranges.

Nearly all of Japan's avocado import volumes come from Mexico which contributed 84 per cent of total volume in 2021. Peru is quickly strengthening its position as the number two avocado source for Japan, followed by, in order of import volume, the United States, New Zealand, Australia, and Colombia.

This, as a consequence, presents a valuable opportunity for Australian avocados, which are in season and in high volume during autumn and winter in Japan.

Seizing upon this opportunity, a Grown in Good Nature campaign was undertaken in Japan from October 2022 to February this year and was declared an overall success based on several factors.

These included the number of retailers involved in the program, the estimated import volume forecasted by importers for next season, the excellent results on social media and the high interest raised during the Supermarket Trade Show that took place in February in Chiba.

While the duration of the campaign had to be extended due to delays in shipment, the flexibility of local trade partners allowed us to meet the key performance indicators and deliver a series of sales-driven activities.

The initial plan was to implement a large number of in-store sampling sessions, but importers had to pivot their strategy halfway through the campaign and decided to replace this activity by in-store displays in much higher volume across the country as a means to reach more customers and increase brand awareness.

Despite the lift of COVID-19 restrictions by the Japanese government, most retailers were still reluctant to conduct these types of activities and the limited space available in stores was another factor that would have made the handover of samples difficult.

That being said, more than 35 retail franchises participated in the campaign through the display of point of sales materials, the distribution of leaflets and sometimes even recommendation sales with a trained staff member and discounts to encourage people to buy more Australian avocados.

The promotional discounts available in more than 500 outlets was the perfect occasion to give shoppers the opportunity to try Australian Hass avocados for the first time and experience an element of comparison with other varieties and origins, especially Mexican and Peruvian avocados.



From left, Manujith Samantha from The Avolution, Richard Magney AAL's Chief of Export - Market Access and Antony Allen CEO of The Avolution.



Avocado Export analysis 2022/23

By Wayne Prowse, Fresh Intelligence Consulting

Australian Avocado Exports

According to the Australian Bureau of Statistics data Australian avocado export volumes reached 10,685 tonnes in 12 months to June 23, which was 8.0 per cent lower compared to last year valued at \$58.82 million. Unit prices were 23 per cent higher at \$5.51 per kg reflecting a better return to growers.

Australian avocado exports had accelerated in 2021/22 influenced by a domestic supply surplus and aggressive competitive pricing in key markets of Hong Kong, Singapore, and Malaysia. This momentum eased slightly though remains well ahead of previous years.

Australian Avocado Exports - Annual Volume by key market

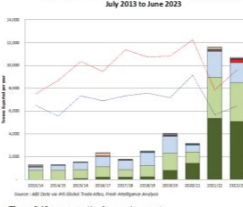


Figure 1: 10-year growth of avocado exports

Market Access Update

By Richard Marney, *Avocados Australia* Chief of Export - Market Access

The avocado market access arena continues to be a hive of activity.

continues to be a hive of activity. Avocados Australia (AA) hosted the Minister and his entourage. The Minister and Ministry of Agriculture to undertake Western Australian verification visits to accredited producers. The Avocado Collective subsequently sent a successful verification shipment from their property in Manjimup, to Bangkok. On 27 September AAL held the official Thailand launch event at the Bangkok Convention Centre. Thailand Ag Counsellor, Amber Pratt, Brad Rodgers (AAI Chair), John Tyas (AAI CEO), and Flora Zhang (AAI Market Export Development Manager). Distinguished guests who attended and also delivered speeches included the Australian Ambassador to Thailand, Dr Angela McDonald, and Western Australian Ministers for Agriculture and Food, Forestry and Small Business the Honourable Jackie Jarvis. Also in attendance was Australia's Senior Trade and Investment Commissioner

and Minister-Counsellor to Thailand, Michael Helleman, Western Australian (WA) growers, exporters and marketers along with many leading Thailand importers and retailers. Just over 100 people attended the launch. A big congratulations to Flora for curating and coordinating a hugely successful day.

The Department of Agriculture, Fisheries and Forestry (DAFF) have edged ever so close to formalising gazette of the India protocol with the Indian Ministry of Agriculture. We wait patiently for news on official approvals and AAL will look forward to advising industry as soon as the news comes to hand. There will be a strategic approach to registering and accrediting industry for India as India is our first market access protocol for all regions of Australia, and DAFF and AAL will need to be diligent to ensure adequate resourcing is allocated for efficiently and effectively administering the

process. Albeit we are extremely excited to open a new protocol market for the entire Australian avocado industry and make steady but certain inroads to the growing consumption of avocado in India.

AAL and DAFF have finalised the visit and itinerary for the Japan Ministry of Agriculture, Forestry and Fisheries (MAFF) to undertake their annual WA audit visit. Integrated into the new \$130M FASTA Fruit Fly R&D Investment, AAL and the FASTA governance committee, in December, will be convening an R&D idea roundtable to ensure we capture necessary R&D to bolster the revised data package to present to Japan MAFF in the effort to seek market access improvement for the inclusion of the broader industry.

Early August, I undertook a market visit to Hanoi, Vietnam. I had the pleasure to spend time at the



Australian Avocados Thailand Launch group photo, in attendance were Brad Rodgers (AAL Chair), John Tyas (AAL CEO), and Flora Zhang (AAL Market Export Development Manager). Distinguished guests who attended included the Australian Ambassador to Thailand, Dr Angela Macdonald, and Western Australia's Minister for Agriculture and Food, Forestry and Small Business the Honourable Jackie Jarvis.

Export development activities step up

By Flora Zhang, Avocados Australia Export Development Manager



Since the last issue of *Talking Avocados* much has happened to progress Avocados Australia's Export development activities. In this article I touch on three activities that significantly added value to our efforts.

Attendance at Asia Fruit Logistics

Australian Airlines and a few Australian attendees at Asia Fruit Logistica each year are always ready for developing trade connections in our region. Asia Fruit Logistica (AFL) returned to Hong Kong this year with a two-day event between 6 September. More than 13,000 trade visitors from over 70 different countries and regions met with over 700 exhibitors. The AFL website (www.asiafruitlogistica.com) and the Asia Fruit Logistica of Talking Australia/Hort Innovation provides an article about AFL attendance that I recommend you read. My key takeaway points from the event are that the first two days of AFL were rich with opportunities and a number of Australian exhibitors took advantage of the opportunity to meet in person. The event did not open on its final day (9 September) due to an extreme weather event involving excessive rain. Local authorities in Hong Kong had issued a "black rain warning" that remained in place for more than 12 hours.

Avocado growers, exporters and marketers that attended

represented the avocado industry and the Hort Innovation stand showcased Australian avocados under the national "Grown in Good Nature" banner. During AFL, the business development managers from India, Thailand and Hong Kong provided our growers and exporters with market briefings and some tips on how to tackle the new markets especially like India. I, along with Richard Magney, Avocado Australia's Chief of Export – Market Access, engaged with other delegates that included importers, retailers and other key stakeholders from existing export destinations as well as prospective markets.

As part of the AFL avocado specific program, I worked with our Trade and Investment Queensland's (TIQ's) team in Hong Kong and delivered a networking dinner followed by an evening wholesale market walk. It was a great experience to visit the containers unloading and to see how the pallets and trays are being distributed to the vendors. Four Hong Kong importers joined this evening program with us.

At AFL there were over 200 Chinese companies exhibiting, with over a hundred from other Asian countries. The show organisers said they were happy to see so many Chinese companies back at the show after a smaller presence last year in Bangkok. The fair attracted wide interest from attendees from across the Asia region. As per last year, stand participants made new trade contacts and gathered essential

Avocados Australia CEO meets with Indian stakeholders

By Anna Petrou, Avocados Australia Communications Manager

Market access to India is very close, with Indian officials getting close to gazetting, officially approving, Australia's market access. In early July John Tyas, CEO of Avocados Australia, made his first visit to India post-Australian avocados provisional access into the India Market as part of a delegation with the Honourable Murray Watt, Minister for Agriculture, Fisheries and Forestry. John had the chance to hold his first tray of Australian avocados in India. These were Costa Green avocados grown in Queensland and John met with Indian importers Sudhir Suri CEO and Manav Suri COO of Suri Agri Fresh. Together they discussed the promising future of Australian Avocados in the dynamic India Market.

Additionally, John took part in retail visits to Nature's Basket, Modern Bazaar and conducted a walk-through of

the Traditional Retail Khan Market and INA Market. This provided John with a comparative view of the Indian trade environment. In retail stores John saw very little point-of-sale information which suggests an opportunity for strong country of origin branding and consumer education.

John also had the opportunity to meet with Tejaswi Rathore (Head of Marketing Austrade Food & Beverage) to discuss marketing and category development ideas for Australian Avocados. He also met with Sumit Saran from SS Associates who is managing the World Avocado Organisation (WAO) marketing program currently underway in India. Talks are underway for Australia to participate in the WAO program to grow the avocado category in India.



2022 Global Market Analysis

Wayne Prowse, Fresh Intelligence Consulting

Global Avocado Production and Trade

The Food & Agriculture Organization of the United Nations reported (via FAOSTAT) global production of avocados as 4.1 million tonnes in 2020 and expanding 8.9 per cent per year over 5 years. Meanwhile the global trade in avocados reported by UN Comtrade in 2021 was 3.1 million tonnes worth AU\$10.9 billion equivalent. The global trade volume has increased on average by 10.6 per cent per year over the past 5 years. Avocado trade is around 40 per cent of global production making it one of the most highly traded fresh produce crops by proportion of production.

The reason is simple, akin to bananas. Being a warm climate crop the world's avocados are mainly grown mostly in tropical climate countries. The world's largest and most lucrative markets (North America, Europe, and North Asia) must import their needs for avocados as they do not have a suitable climate to grow sufficient volume, if any, to meet their demand. Asia avocados have seen a strong increase in demand as consumers discover their benefits and cannot get enough of them.

Therein lies the opportunity for export market growth into Northern markets.

Importers

The United States is the largest single country importer of avocados, importing 1.1 million tonnes in 2021/22, mostly from Mexico. Europe is also a large importer by region with combined imports of 1.36 million tonnes although re-export into European trade reduces the net imports to around 631,000 tonnes imported mostly from South America and Israel.

By global measures Asia is a small importer though has rapidly increasing growth rate. Asian markets imported 150,000 tonnes of avocados in 2021, which was 13 per cent more than the previous year and 9 per cent increase per year over 5 years. Japan, China, Hong Kong, and South Korea were the main importing markets and accounted for 90 per cent of the avocado imports by Asia.

China and South Korea are increasing imports more rapidly as avocados are becoming more popular in these markets. Hong Kong, now Australia's largest destination is also increasing.

Japan has long been the largest importer of avocados in Asia and recorded 65,914 tonnes imported in 2021/22 albeit falling 25 per cent in one year. Mexico and Peru are the main suppliers though the supply from Mexico declined offset by strong growth from Peru.

China is recording the highest growth rate for the imports of avocados over 10 years and increased 38 per cent to 43,134 tonnes in 2021/22, although annual imports are somewhat volatile. South Korean imports have increased to 15,486 tonnes and are being driven by aggressive market development activity from Peru.

Southeast Asian markets are smaller but are of interest to Australia where in 2021/22 Australia held a market share of almost 70 per cent in Singapore and 64 per cent in Malaysia. The aggressive pricing enabled Australian avocados to be competitive in these markets and the chart in Figure 3 shows the strong preference for Australian avocados when pricing is competitive.

It is evident that when Australian prices were much higher than the average, such as in early 2021 the demand from Australia was low and the supply was supplemented from Mexico and United States. From June 2021 until September 2022 the prices from Australia matched the average from all suppliers and being in the AUS\$5.00 area Australia regained a strong market share, thus lifting export volumes substantially. Since August 2022 the import prices have been creeping up and the volume from Australia has been decreasing. This chart also highlights that the market is prepared to pay around the AUS\$5.00 per kg for avocados to maintain a monthly demand for between 400 – 500 tonnes.

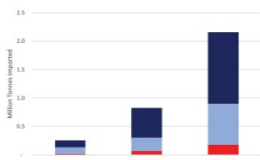


Figure 1. 20-year Avocado Import growth 2002 – 2021 by major regions.

Southeast Asia Market Visits a success!

Flora Zhang, Avocado Australia Export Development Manager



The Avocado market access and trade development (AV20004) project has been busy, and we have a lot of activities planned this year. I will be providing you with information about these activities in issues of our newsletter Guacamole and in Industry Notices so make sure you check your inbox and read our emails! For now, I would like to provide you all with an overview of the Southeast Asia Market Visits that took place at the end of last year. The Southeast Asia Market Visits took place in order to support Australian growers and exporters with trade development in Asia. Avocado Australia organised the Southeast Asia Market Visits to Bangkok, Kuala Lumpur and Singapore in November 2022. This was the first tour that Avocado Australia organised of this kind and the tour proved to be highly successful. Sixteen businesses took part sending representatives who were able to network and generate business leads during the program of activities. In all, the program was very busy over two weeks and included attendance at Asia Fruit Logistics (AFL).

At AFL growers and exporters had the chance to meet with trade partners and listen to the latest market insights in the Asian region. Australian avocados were featured by Austrade in cooking demonstrations that showcased avocado appetizers,

breakfast, and salad recipes. After AFL the Avocado Australia team and Southeast Asia Market Visit Group went to the Tahad Thai wholesale market which is the largest in the ASEAN (Association of Southeast Asian Nations).

In Malaysia growers and exporters had an opportunity to network with importers and retailers who shared their experiences with Australian avocados leading to interactive discussions. The industry provided an update joined by the regional grower representatives. The group heard from the Malaysian Commissioner, Melanie Harris, and Agriculture Minister, Sanjay Bhattacharya in the current outlook of the Malaysian market. In Kuala Lumpur the group spent time visiting the local wholesale market as well as retailers including ALIXON Group Malaysia and The BIG Group Malaysia where Australian Avocados were featured. They also visited the facilities of local importers Euro-Atlantic and Khushin Trading HQ giving growers the opportunity to better understand the export supply chain.

The group was in Singapore for the final leg of the tour. There they kicked off with some retail store visits to CS Fresh, Little Farms, and FairPrice Finest. This was followed by a tour of the Singapore fresh wholesale market, Patis Pajang

Market Access Update

Richard Magney, Avocado Australia

Avocado Australia Limited (AAL) has, for many years, had a sharp focus on exports and market access. However, given the fast-evolving competitive international avocado market landscape, coupled with domestic market factors, the AAL Board have strategically chosen to double down on market access activities, and created a new role to help execute the goals of AAL's Market Access Strategic Plan 2022-2026. Richard Magney started in the new role as Chief of Exports – Market Access in early November 2022 and in this article, he provides an update on AAL's recent market access activities. This new role is not funded through a levy funded project but instead is funded directly by Avocado Australia.

Indian Delegation

The new dawn of market access activity for AAL kicked off with a very busy schedule. On my first day at AAL, on 30 October, I boarded a flight to South Australia, where I joined AAL Board members to participate in an Indian delegation visit. The Indian delegation was visiting the Tristate region to explore, and inspect, orchards and packhouses, with the intention to progress bilateral market access discussions. Also forming a key part of the Australian delegation were key members of the Australian Department of Agriculture, Fisheries and Forestry (DAFF). The three-day trip allowed for robust and progressive discussions about Australia's diverse avocado industry, and importantly allowed for quality networking time to help forge deeper trusting relationships.

Instrumental to the three-day visit, was our own DAFF Agricultural Counsellor, based in New Delhi, India, Mr. Karan Karamil. Karan demonstrated, and helped us understand, key cultural business idiosyncrasies. Throughout my time talking with Karan on the trip, he explained the fast-growing consumer interest and demand for avocados, in particular, Australian avocados. Karan talked about the emerging trend in India for mothers to feed their young children healthy avocados, and the burgeoning home delivery market for fresh produce, pioneered by Amazon Fresh. Karan, himself, explained how he can place an order on his smartphone at 4pm in the office, and when he arrives home at 5.30pm, there is a chilled bag waiting at the door of fresh produce: leafy greens, bananas, and a few avocados... and maybe a little bit of chocolate! Although India is estimated to have reached a population of 1.3 billion, Karan is of the firm view that at least 5-10% of India are sophisticated, mature grocery consumers, and avocados are directly in their sights.

A major highlight for both the Indian and Australian delegation, was the networking dinner hosted on a Murray

Riverboat. Albeit the World Cup Cricket was on the television when we boarded the boat and took the Indian's attention away from avocados for a moment, we were all soon soon stop the riverboat enjoying a refreshing evening sundowner, as we drifted down the Murray, enjoying some good old-fashioned networking... whilst trying to spot some kangaroos for our tourists! As the sun set, and everyone adjourned to the dinner table on bottom deck, we were all treated to an avocado inspired degustation. We enjoyed some Avonara, a take of Carbonara without the cream. The chefs skillfully emulsified avocado into the delicious cream, and mixed in pasta, garlic, and mushrooms etc. Another highlight was the incredible avocado infused sorbet... there were seconds, and thirds being served up! The Indian delegation left the dinner understanding many alternative uses of avocado other than smashed aro on toast or guacamole.

DAFF continue to drive the bilateral dialogue with India, and we remain optimistic both Australia and India edge closer to an outcome that will open great opportunities for our industry.

Southeast Asia Delegation

Departing the Tristate, I boarded a flight to Bangkok, Thailand, to join my colleagues at Asia Fruit Logistics. I was unable to participate on the opening two days of the expo, given my attendance in the Tristate, however my esteemed colleague Flora Zhang was flying the flag for exports, market development, and market access. I was fortunate enough to participate on day three where we took a trip to the Bangkok fresh produce markets. There was a group of about thirty Australian growers (including avocado), marketers, industry associates, and department staff, that participated in the market visit. We were able to learn of the current avocado wholesale and import landscape in Thailand, and see firsthand, avocados imported from South and Central American countries. I was able to engage in meaningful discussions with several importers to learn more about their challenges, and how they are trading with existing suppliers such as Mexico, Peru, and Chile.

Next stop was Kuala Lumpur, Malaysia, where Australia has a healthy trading relationship. Again, the delegation embarked in fresh produce market visits, where we saw lots of great looking Australian avocados from groups such as Avocado Collective and The Avocado Group. Our Malaysian Austrade team hosted a formal networking function, where we were fortunate to hear from many importers, wholesalers, and retailers about their current avocado businesses, and importantly how Australia can

Australia-India - Tariff reductions applied as trade agreement enters force

Australian avocado exporters will benefit from tariff reductions under the Australia-India Economic Cooperation and Trade Agreement (ECTA). However, Australia does not yet have technical market access to India, so the benefits will only be realized once access is granted.

The agreement entered into force on 29 December (2022), bringing an immediate round of tariff reductions, followed by another round on 1 January (2023).

Avocados, macadamias and berries were among the products to have their tariff rates lowered under the agreement. Tariffs on these products will be phased down to zero within six years, according to a release issued by Australian minister for trade and tourism, Don Farrell.

The Australian government will manage the tariff-reduced quota system, according to AgNet Media.

The trade agreement will also support Australia's workforce needs, with an additional 1,000 work and holiday program places being made available to young Indian travellers.



India is Australia's sixth-largest trading partner and its fourth-largest export market.

"Australia and India are natural trading partners - this agreement will unlock the enormous potential in our trading relationship," Farrell explained.

Source: fruitnet.com

HYDRALADA

TALK TO US TODAY ABOUT THE BEST OPTION FOR YOU.....

Finance options available at very competitive rates. *Terms and conditions apply

- All terrain self-propelled elevating work platforms.
- Range of models available from 3.00m to 8.00m platform height.
- Tandem Four Wheel Drive option for steep undulating terrain.
- Four or hand control options for maximum productivity.
- Designed and manufactured to meet Industry Standards NZ & Australia.

1800 124 352

hydralada.com | sales@hydralada.co.nz

A SAFE, EFFICIENT WAY TO WORK YOUR AVOCADO TREES!

Marketing Aussie avocados internationally: Hong Kong Avocados Campaign overview

Compiled by Anna Petrov, Avocado Australia

This article provides an overview of what was involved in the recent Hong Kong marketing campaign, and provides some outcomes and learnings. The 2022 marketing program for Australian Avocados began at the end of August and concluded in late November. The marketing effort utilized the "Grown in Good Nature" program.

The Export Marketing Program's Campaign Objectives were to:

- Engage with the local audience promoting brand advocacy for the Grown in Good Nature program.
- Drive sales of Australian avocados and contribute to an increase of additional orders with retailers and importers.
- Showcase the vast array of health benefits associated with Australian avocados.
- Educate locals on the many ways in which Australian avocados can be consumed and build a competitive value proposition.
- Become the reference product in Hong Kong's consumers' mindset in terms of both quality and taste.

Campaign Overview & Activity Summary

The Grown in Good Nature campaign in Hong Kong for Avocados comprised of both offline and online activities including the distribution of point-of-sale materials, food services promotions, e-commerce engagement and social media support. The rollout in each platform was nuanced to how the audience consumes the medium which proved the way for the marketing team to generate good results. This overview of the activities undertaken also provides the corresponding results as well as the challenges faced throughout.

Here are the highlights of the activities in Hong Kong:

- **In-store display** – Distribution of point of sale (POS) material across three major retail partners – AEON, Wellcome and ParkShop – across 30 stores for one-month duration.
- **Retail promotions** – W Trained local staff attracted shoppers and triggered sales in supermarkets. A total of 84 sessions across 28 stores were conducted over a 3-week period.
- **E-commerce engagement** – Reached out to and engaged a broader audience via e-commerce platforms Freshie, bk and Chuan Fruit to boost the sales and increase the awareness of Australian avocados. A mix of activities such



as advertising banners, promotional discounts and social media posts were delivered from mid-October to mid-November.

- **Food services promotions** – Partnered with Australia-style cafes and restaurants to create special menus with Australian avocados as the hero product. A total of seven outlets took part in this activity during two weeks at the beginning of the campaign.
- **Social media support and YouTube advertising placement** – Promoted Australian premium produce on the Grown in Good Nature official social media channels, including both Facebook, Instagram, and YouTube.

Activity Breakdown

In-store activity

Display and the use of in-store sales staff was extended across a total of 30 stores, encompassing both Wellcome (20 stores) and AEON (10 stores) throughout October and November. All stores implemented POSM (Point of Sale Marketing), and shelf displays as well as taking part in the distribution of leaflets to local shoppers. The retail program was highly successful according to retailers with a rising demand from consumers for Australian premium produce. In-store sales staff give brands the opportunity to capture customers while they are in the mindset of food shopping and at the same time increasing education and understanding of the different varieties. To ensure that the staff on ground are equipped with the right messages and information, an online course was

Export Market Analysis - Thailand

By Wayne Prewie, Fresh Intelligence Consulting

Avocado Global

Global avocado supply exceeds 8 million tonnes and is likely to reach 10 million tonnes by 2025 based on current trends, and global analysis of new avocado production areas, including in China, Vietnam, and India. Mexico remains the avocado powerhouse producing more than 25 per cent of the global supply. In 2022 some 3.1 million tonnes of avocados were traded globally according to UN Comtrade data with the major trade lanes being from Mexico to United States and from Peru to Europe.

Australian Avocado Exports

Early data for Australia's avocado exports for the year ending 30 June 2023 reached 10,600 tonnes and around 9 per cent below 2022. With some export unit values increased bringing the overall value to A\$587m. This was helped by a falling exchange rate against the USD as seen in Figure 1. (Estimated and subject to final confirmation by ABS)

Hong Kong, Singapore, and Malaysia still accounted for 96 per cent of Australia's export volumes however 276 tonnes or 3 per cent were exported to Japan which lifted 161 per cent from 106 tonnes in the previous year. The remaining 1 per cent was shared across a dozen markets including Indonesia, the Middle East and Pacific.

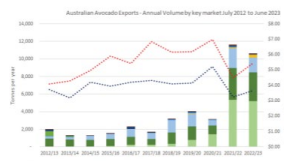
Thailand



Avocados have been gaining popularity in Thailand in recent years. Although traditionally not a native fruit, avocados have found a growing market in the country due to their nutritional benefits and versatility in various cuisines.

The demand for avocados has been driven by factors including the increasing awareness of health and wellness among Thai consumers that is leading to a greater emphasis on nutritious food choices particularly among younger affluent consumers. Additionally, the influence of Western cuisines and global food trends has played a role in the rise of avocados in Thailand.

Avocados have been marketed as a premium fruit with a perception of being trendy and fashionable in Thailand. This appeal has captured the interest of young, "influential" consumers who are willing to try new and unique food



Source: UN Comtrade Trade Data, Fresh Intelligence Analytics

Figure 1: 10-year growth of avocado exports

18 NEWS TALKING AVOCADOS WINTER 2023

TALKING AVOCADOS SUMMER 2023

MARKETING UPDATE

49

WINTER 2023

Global Avocado Market Intelligence

By Daniel Martins, Avocado Australia Data Analyst

A global trade data analysis framework was developed in the second quarter of 2018 specifically targeting current and potential exporters. This framework provided the foundation for a series of reports that have been developed and provided to exporters and the broader industry to assist with developing export markets and understanding global competitors.

The reports are made available to current exporters, as well as growers, and packers that are able and would like to export. All the reports are uploaded to the Best Practice Resource on our website, and we email out the monthly report to those subscribed to our export news list.

To access the Global Avocado Market Intelligence reports please visit our Best Practice Resource at <https://www.avocadoaustralia.com/best-practice-resource/export-report-updates>, or use the QR code provided using your mobile phone.

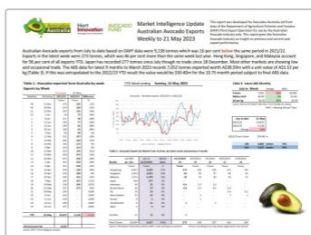
The current suite of global trade reports is comprised of:

Weekly export updates:

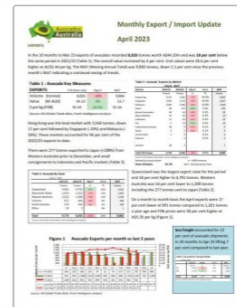
1-page weekly dashboard report based on DAFF data showing latest week and year to date exports compared with the previous year. The report includes relevant commentary to provide further insight into the current state of Australian avocado exports.

Monthly export update:

Latest month and year to date Australian exports compared with the previous year and Moving Annual Total (MAT) by volume, value, and unit value. Latest monthly import update and market shares and CIF price points by competitor for 5 key markets of interest (Singapore, Hong Kong, Malaysia, Japan, and India). Latest Australian imports from New Zealand and Chile by month and season to date. Similarly, this report includes relevant commentary to provide further insight into the current state of our exports, as well as fruit imported into Australia from New Zealand and Chile.



The Weekly Export Update.



Monthly Export Update.

TALKING AVOCADOS WINTER 2023

NEWS

15

Driving Export Success

Fiona Zhang, Avocado Australia Export Development Manager

Expanding your business through exports is an exciting endeavour and one effective way to achieve this is by investing in strong business relationships. Hosting an international buyers' mission provides a unique opportunity to connect with potential buyers and cultivate valuable connections. Last month Avocado Australia had the opportunity of working with Trade and Investment Queensland (TIQ) on inviting 14 international delegates to Far North Queensland as part of the Trade of Tropical Queensland program. The Trade of Tropical Queensland was held by TIQ and connected both international and domestic buyers with Queensland exhibitors. The 14 delegates for the avocado program included retailers and importers from Malaysia, Singapore, Hong Kong, and the Middle East.

In this article, I will share my learnings with you to help you explore how to leverage these relationships and understand your export opportunities while driving your avocado export growth.

1. Building Authentic Relationships:

To establish a solid foundation, it is crucial to invest in building genuine business relationships. Take the time to connect with individuals on a personal level, fostering trust and mutual understanding. This can be accomplished by organising farm visits, where international buyers can experience first-hand the land and trees where avocados are grown. Sharing your passion for avocado cultivation and providing informative updates, such as season reports harvesting/stocking updates and farm updates, will demonstrate your commitment to quality. If the exporters are new to the export space, it might take a while to experience and select like-minded business partners.

2. Understanding Buyers' Objectives:

To effectively cater to the needs of your potential buyers, it is important to understand their business objectives. Spend the time necessary to establish your vision and business plan for the next 2-3 years as it is important in helping both parties to instill a growth mindset. Engage in regular communication to gain insights into what matters most to them and what challenges they are facing. Are they focused on capturing a larger market share for avocados, or are they looking to build their brand and reputation as selected channels? By aligning your efforts with their goals, you can identify mutual benefits and tailor your export strategy accordingly. It is also a great opportunity to demonstrate your commitment to building export markets and to nurturing the business relationship.

3. Adding Value through Expertise:

Position yourself as a trusted grower/exporter by showcasing your expertise in avocado production and the supply chain. Share your knowledge and insights with the overseas buyers. Help them to understand the quality standards, critical factors in growing export-ready avocados, and market trends related to avocados. By positioning yourself as a quality expert, you not only instill confidence in your products but also provide added value to your customers.

4. Regular Communication and Follow-up:

Maintaining regular contact with your buyers is essential for nurturing long-term relationships. Stay informed about their business updates and objectives and demonstrate your commitment to their success. Share relevant industry news, provide market insights, and discuss potential areas of collaboration. By staying connected, you can adapt your export strategy to evolving market conditions and address any concerns promptly. Regular communication can be via WhatsApp, LinkedIn, or text messages and share photos of your avocados.

5. Identifying Opportunities to Add Value:

Identify how your business can add value to your customers through avocado exports. This could include offering seasonal updates, providing tailored packaging solutions, or developing joint marketing campaigns. Collaborating with buyers to understand their specific needs and preferences allows you to differentiate your product in the market and strengthen your competitive advantage.

Investing in business relationships is a key driver for export success. Hosting an international buyers' mission serves as a platform to build authentic connections and gain valuable insights into your potential buyers' objectives. By investing time in understanding their needs, sharing expertise, and maintaining regular communication, you can drive export growth and create mutually beneficial partnerships. Leveraging these strategies in the context of avocado exports will position your business for sustainable success in the global market.

Contact Information:

For more information contact Fiona Zhang, AAG Export Development Manager, email export@avocadoaustralia.com or call 0499 606 613.

TALKING AVOCADOS WINTER 2023

NEWS

21

Market Access Update

By Richard Magney, Avocado Australia Chief of Export - Market Access

Market Access continues to see a variety of opportunities and developments across the space. Since my last article, we have completed the ten trial shipments to India, received approval by Japan Ministry of Agriculture, Forestry and Fisheries (MAFF) for our accredited property list to begin exports from WA, completed Thailand accreditation for Western Australia growers and packers, discussed progress with Department of Agriculture, Fisheries and Forestry (DAFF) for New Zealand market access improvement specifically avocado unsalubrious virus (ASBVd), begun building some frameworks around market access improvement for Japan, taken important steps toward progressing market access to Vietnam and China, and collaborated with project authorities to make critical and positive strides toward the launch of the forthcoming \$100M Fruit Fly R&D investment project, AM22000.

India

The India trial shipment tallies made up of members from DAFF, Austrade, Avocado Australia (AAI), and industry, successfully orchestrated the execution of shipments to Delhi and Mumbai under the Indian draft protocol. The tenth and final trial shipment arrived in India on 5 July, and we are excited to announce the successful completion of the trial shipment process. Again, a big thank you to all the growers and packers that submitted an EOI to participate in the trial shipments, and to trial partners: Canto, Simpson Farms, Don Fort Packing, The Aviation Group, and Sunny Spot Farms, for their diligence, patience, and investment, in achieving a great outcome for industry.

AAI and DAFF are working toward an indicative timeline to try and have industry registered and accredited late August/early September, to continue the supply chain into India. All involved are working feverishly to ensure there is as little disruption to the supply chain into India, particularly given the trial shipment avocados are already being successfully sold through retail to Indian consumers.

The Minister for DAFF, the Hon. Murray Watt, invited AAI CEO, John Tye, to attend a departmental on-board trade delegation visit to India in early July where John had the opportunity over several days to network with Minister Watt to progress the launch plans of Australian avocados into India, but also spend time discussing with Minister Watt other important key steps the avocado industry needs to take to drive access into emerging vegetable markets (within the MAAP pool) such as Vietnam and China, and market improvement pathways for Japan and New Zealand.

Japan

April through June, the WA industry underwent their annual Japan registration and audit/accreditation process. All applicants passed with flying colors, and subsequently the accredited list has been approved by MAFF. We witnessed the growth of the applicant pool with 7 new growers and 1 new packer bringing the total accredited pool to 22 growers and 5 packers. Exports began early July with demand looking greater than in previous seasons.

Gaining market access improvement to Japan for the broader Australian avocado industry is a key performance indicator for AAI, and aligns with the market improvement plan of DAFF. MAFF have provided technical feedback to DAFF on the barriers we need to address and overcome to ensure our Fruit is pest free. AAI are working with researchers, namely research partners of the Fruit Fly investment project, AM22000, to create a research plan, and data package, sufficient to meet technical barriers.

Thailand

The Industry Advice Notice (IAN) for registrations for Thailand opened at the same time as Japan. WA growers and packers were able to register in time with Japan registrations. Late June, Thailand Department of Agriculture (DOA) rather stamped the official granted protocol and sent it through to DAFF. DAFF will undertake Thailand audits and accreditation in preparation for an accreditation visit by the Thailand DOA late August. Thailand DOA have made a verification shipment request, and for industry to complete one shipment which meets the requirements of the protocol. This shipment can be shipped immediately after Thailand's verification visit, and it could be expected that WA could have access to export early October, and as early as mid-September if an air freight shipment is allowed for the verification. We do not have confirmation of the shipment made at the time of drafting this article.

New Zealand

ASBVd is a quarantine pest for New Zealand. New Zealand currently requires Australian avocados to be sourced from orchards that have been planted using approved stock known to be free from ASBVd. Under these conditions a grower must provide documentary evidence for registration with an official tree certification scheme such as ANVAS, with reference to indeed and new indeed blocks. While this approval of orchards based on ASBVd-free planting material is an effective means of demonstrating freedom from ASBVd, these conditions mean that if records such as the identification

Hitting the mark on the international stage

By Troy Agost, International Marketing Manager, Hort Innovation

Brett Lee lining up for avos

One of the fastest bowlers in world cricket during his prime, Brett Lee is now going in to bat for Australian avocados.

The popular former cricketer, who has a high profile internationally as well as in Australia, has signed up as an avocado ambassador.

Now an international cricket commentator, businessman, author and philanthropist, Brett will soon be speaking the attributes of avocados on various media platforms in India, the Middle East and Australia.

He needs no introduction to the Indian target audience – Brett is something of a lion on the subcontinent where, in addition to his cricketing exploits, he starred in a Bollywood movie, wrote and starred in a popular TV series and has appeared on numerous prime time television talk shows.

As the new avocado ambassador, Brett will be delivering positive messages about Australian avos, extolling their virtues in terms of taste, nutrition and versatility.

Light-hearted in its approach, the campaign will feature Brett in the orchard, in the kitchen and at home relaxing.

His genuine love of avocados will be at the heart of the campaign which will encourage consumption at all meal times.

Video content was filmed in July and you can expect to see Brett at events, on social media and in regional marketing materials.

Activity galore globally

Much is happening on the Grown in Good Nature international marketing front, with activity continuing to abound in the key markets of Singapore, Malaysia and Hong Kong, in particular.

The Singapore campaign (April-July) involved a comprehensive retail, e-commerce and food service program including four retail partners, 20 stores nationwide, 128 push-vending systems, distribution of thousands of leaflets and goodies, seven weeks of advertising placements and the engagement of numerous influencers.

Proud to be the campaign in Singapore has been promotion of the benefits of Australian avocados: their fresh and excellent



Former cricketer Brett Lee to act as an avocado ambassador



Avocados Australia new export intel portal

By Daniel Martins, Avocados Australia

Avocados Australia is developing a one-stop-shop for export market intelligence, where users can find current actionable data and valuable insights directly from our key export markets.

The platform focuses on the industry's priority markets and will include in-market online and on-shelf pricing, display and promotion images and videos, as well as becoming the hub for the export report suite.

The platform will be managed by our newest contractor ExportConnect. ExportConnect will gather in-market information directly from the source and update it to the platform fortnightly. Everyone with access to the Best Practice Resource (BPR) will be granted access to the new platform by default.

The export intel portal has been designed to include the following modules:

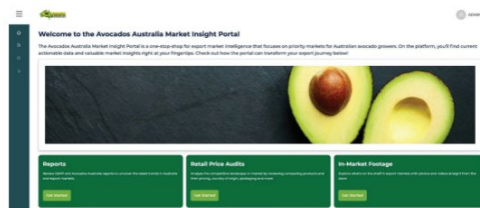
1. On-shelf retail price and online competitor audit; analyse the competitive landscape in-market by reviewing competing products and their pricing, country of origin, packaging, and more.

2. Export Market In-store Photos & Videos: explore what's on the shelf in export markets with photos and videos straight from the store.
 - Avocados.
 - Avocado category display.
 - Promotions of fresh fruit and vegetables that are occasionally occurring on the fortnightly visits.
3. Export Market Reports: these are the currently available periodic reports developed by Fresh Intelligence and DAFF. The new export intel portal will become the hub to access these:
 - Weekly & monthly export/import update reports.
 - Global trade annual reports.
 - DAFF reports.

The information available in the portal will be comprised of 3 of the main retail stores in addition to 6 online outlets in 8 key markets: Singapore, Malaysia, Hong Kong, Japan, Saudi Arabia, United Arab Emirates, India, and Thailand.

The retailers will be selected based on their market dominance. The portal will include a module showing their location on a map.

We expect the portal to be delivered to industry by the second quarter of 2024. Once the portal has been delivered and



Avocados Australia new export intel portal main menu.

16 NEWS TALKING AVOCADOS AUTUMN 2024

Global Export Trade Update

By Wayne Prowse, Fresh Intelligence Consulting

In February while in Berlin for Fruit Logistica, Fresh Intelligence attended the World Avocado Organisation (WAO) conference and heard about the WAO 2023 investment in research and marketing programs for avocados in Europe. It was good to hear the enthusiasm for driving avocado market growth in Europe using many of the marketing tools that the Australian avocado industry has been using for over 2 decades.

Europe

The investment in market research was significant across 5 key markets (Spain, France, UK, Germany and Italy) that pulled together retail and consumer market data to understand consumer purchase behaviours and eating occasions for avocados. The research provides avocado marketers with insights and data to help understand and target opportunities for growth.

The campaign in Europe sought to position avocados as a sustainable, superfood and a nutritious and tasty food for a healthy lifestyle. Highlights of the program involved educating consumers through media that generated 553 positive stories in media publications potentially being viewed 842 million times.

The social media & influencer activities involved

- 4 social media channels - Facebook, Instagram, TikTok and Pinterest
- 626 social media posts in 4 markets/ languages
- 15 influencer marketing collaborations
- 143 influencer stories

The campaign reached 31 million consumers with a 9.2 per cent engagement rate and generated more

than 200,000 followers according to the WAO campaign managers.

European consumption per capita is around 1.5kg per person, albeit varying by market which the substantiated research showed, compared to 5 kg per person in Australia. There is significant growth potential for avocados in Europe which currently consumes around 800,000 tonnes or 10 per cent of the global production. Although largely out of reach for Australia, the trends in Europe and North America do influence trends in Asia as we are seeing.

India

We also heard about the WAO investment in India involving a pilot 5-month educational campaign launched in June 2023. Fortunately this helped prime the market for the arrival of the first 330 tonnes of avocados from Australia in January/February 2024.

The campaign set out to introduce avocados to consumers via social media using leading food and lifestyle media and celebrated chefs and nutritionists as influencers. The results were above expectations achieving 33 million impressions in social media with a 2.2 per cent engagement rate. However, these numbers are small in the 1.4 billion population and underscore both the challenges to reach consumers and the market potential. India imported 3,931 tonnes of avocados in 2023 lifting 79 per cent in one year and is increasing exponentially. Here Australia is in a strong position to capitalise on the growth in demand for avocados and be part of the supply base.

Australian Exports lift 52 per cent in 2023

Australian avocado exports for January to December 2023 were 16,624 tonnes, which was 51.7 per cent higher compared to same period last year and valued at AU\$77.01 million. Unit prices



18 NEWS TALKING AVOCADOS AUTUMN 2024

A fruitful trip to the GCC for Aussie avocados

By Flora Zhang, Avocados Australia

Off the back of the 2023 Avocado Global Tour, in February 2024 Australian avocado growers participated in a market visit to the Gulf Cooperation Council (GCC) region. Last year's programme was a huge success, culminating in leading retailers moving over 300 tonnes of Aussie avocados across the GCC region. Growth prospects are looking even more promising for 2024, with this figure to be tested over the next 12 months as Australia solidifies its position as a leading premium avocado exporter to the GCC.

This year, the programme involved a visit to Kuwait, the United Arab Emirates (UAE) and Saudi Arabia as well as a chance for growers to exhibit at Gulfood 2024 - the world's largest annual food and beverage sourcing event showcasing over 5,500 Food and Beverage (F&B) brands and 150,000 products from more than 90 countries. Over the course of the trip, avocado growers were given the opportunity to visit supermarkets and produce markets on the ground and meet with buyers from key F&B retailers - both in their offices and at Gulfood. This allowed the growers to gain a unique first-hand insight into the market and build connections with prospective buyers to develop a thriving export strategy. Now let's take a closer look at the export opportunity for Australian avocados in the GCC region!

Business in the Middle East is concentrated within the GCC region. Established in 1983, the GCC is a political and economic alliance of six countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE) designed to unite members based on common objectives including strengthening regional coordination and economic ties. The alliance encompasses over 58 million people and is responsible for 1.7% of the world's GDP, with The World Bank forecasting the GCC's GDP to triple by 2050 - signifying extraordinary trade potential.

Meanwhile in Australia, avocados are on a strong growth trajectory with production forecast to increase by 40% by 2026. Combined, these statistics demonstrate a significant opportunity for Australian avocados in the Middle East, further supported by the fact that Middle Eastern consumers are becoming increasingly health conscious and selective in their food choices. This has seen a shift towards consuming more fresh fruit and vegetables, with avocados especially viewed as a superfruit thanks to their strong nutritional benefits as a source of healthy fats, vitamins E and folate.

Further, the avocado market in the GCC is extremely diverse, with avocados imported from a wide range of countries. While Kenya is currently the dominant supplier to the

Successful Trade mission to India reveals new insights

By Anna Petrou, Avocados Australia

From 21 to 22 March, 'Fresh Produce India' took place in Mumbai and for those interested in the Indian market it was an essential event to attend. Fresh Produce India assembled a large gathering of people exclusively from the fresh produce industry in India.

The event is regarded as India's top business event for fresh fruit and vegetables and brings together the best opportunities for B2B networking. John Tyan, Avocados Australia's CEO, and seven avocado growers/exporters attended the event and had the opportunity to network and connect with key Indian stakeholders along with other international business representatives.

An Australian avocado sampling display was in a prominent position at the entrance to the event and attracted a lot of attention. A range of dishes were prepared by celebrity chef Rakhee Vaswani demonstrating the versatility of avocados, including some very effective examples of how avocados can be incorporated into Indian cuisine.

The Australian avocado growers and exporters that attended could connect with customers, buyers, and other service providers. The presentation program covered valuable information on emerging trends along with practical takeaways that delegates could use in their businesses. The presentations included a spotlight on avocados and berries. John Tyan was one of the speakers and he spoke alongside Zac Rand (Westfalia Fruit), Ajay Ig (Westfalia Fruit), Peter McPherson (Costa Group) and Ambrish Karwat (Tropicana Group of Companies).

While in India John Tyan met with key stakeholders including importers, wholesalers, retailers and ripeners. He also had the opportunity to visit retail outlets, the Westfalia Ripening facility and the Westfalia team. The trip also included visits to a wholesale market.

Among the highlights of the trade mission to India was probably John witnessing the dominance of Australian avocados in the Mumbai market. John also found that the interest at Fresh Produce India in Australian avocados was very strong.

'Importers in Mumbai became familiar with Australian avocados during January to March this year following the first entry into the market,' said John Tyan.

'Many have told me they are impressed with the exceptional quality of avocados that have been supplied from Western

Australia, so Australia has established a very strong reputation in a short period.'

'It will be important that the rest of the country continues in this vein once the east coast starts supplying. The east coast will be going head-to-head with Tanzania who can supply at half the price of Australia. Indications are that Australia can compete based on quality, but consistent high quality will be paramount.'



John Tyan, Avocados Australia CEO, providing an Australian avocado industry overview at Fresh Produce India.



Fresh Produce India attendees - L to R Front Row: Rakhee Vaswani, Celebrity Chef, John Tyan-CEO, Avocados Australia, Antony Allen-CEO, The Avocado, Floris Abaj-Ampro Marketing, India Representative of Avocados Australia, L to R Back Row: Wayne Robinson-Marketing Manager, The Avocado Collective, Brent Chambers-Marketing Manager, Simpson Farms, Joshua Clementson-Brand Manager, Bondi Agri, Kabul Singh-Ampro Marketing, India Representative of Avocados Australia.

20 NEWS TALKING AVOCADOS AUTUMN 2024

TALKING AVOCADOS AUTUMN 2024

NEWS 25

Market Access Update

By Richard Magney, Avocado Australia

It has been very busy on the Market Access front since the last issue of Talking Avocados magazine. Much of my time has been focused on China but here for you now is a quick overview of some of the activities.

China

In the past 13 months, China has opened market access for avocados from Kenya, South Africa, Dominican Republic, and Vietnam. This is a clear sign that China recognise their immediate need for more volume of avocados to meet the burgeoning demand growth, and secondly, this signals an opportunity for Australia to open dialogue with the General Administration of Customs China (GACC).

In the theme of demonstrating Avocado Australia's commitment to China market access, Avocado Australia (AAL) have been granted the once in a decade opportunity to be a Co-Major Sponsor for His Excellency Mr. Scott Dewar, new Ambassador to China, at the celebratory Welcome Dinner, on 16 April in Beijing. Ambassador Dewar was appointed by the Albanese government in September 2023, and recently took residence in the role in April 2023. As part of AAL's membership of AustCham Beijing, AAL was fortunate enough to coordinate a partnership with longtime AustCham Beijing Foundation Member, King & Wood Mallesons, to share the prestigious and honourable Co-Major sponsorship. The dinner is expected to host between 200-300 guests from blue-chip Australian and Chinese companies, and government officials. AAL looks forward to deepening relations with key market access stakeholders, but importantly sharing industry's appetite to access China. AAL importantly thank Ms. Sue Kersch, King & Wood Mallesons Global CEO, and AustCham Beijing Vice Chairperson, for affording AAL Co-Major Sponsorship and sharing the podium, along with her firm.

It is confirmed, Mr. Sheng Wei, avocado and macadamia farmer in the Bundaberg region, will be travelling to attend the important occasion, and will use the Welcome Dinner to re-engage with the business community, and to voice his support for market access. Mr. Wei moved from China to Australia in 1992 and has built a successful domestic and export business.

Within the last five months two large Chinese fruit importers, Riverking and SupaFresh, have conducted in-bound visits. The interest continues to grow. In February, a large fruit importer from Chengdu, Sichuan Trading Company, made a trip to Australia to visit our avocado farms. Chengdu is the capital of southwestern China's Sichuan province. Chengdu's history dates back to at least the 4th century B.C. and it is very

exciting to see avocados emerging as a favourite food amongst the people within this region. AAL thank the Sichuan Trading Company Founders Jason, and associate, Betty, for their effort to visit and explore opportunities.

To continue building credentials and capabilities toward technical market access, AAL continues to prepare for several important China related engagements -

- Shanghai Fruit Expo (September 2024)
- China International Import Expo (November 2024)
- China Entry-Exit Inspection & Quarantine Association inbound trade visit
- Industry outbound trade and research mission to China (approved investment, Project AY23012)

Behind the scenes, AAL is working hard to ensure avocados are next in line for negotiation for access to China by the Australian Government.

AAL will continue strategic market access dialogue with state and federal ministers, and the DAFF Secretariate Office.

India

As the WA season closed, we can announce a very exciting 330 tonnes of Haas were exported to India. This was achieved in the timeframe of about 11-12 weeks. Registrations and accreditation for East Coast Australia are complete and AAL looks forward to watching industry build on the fantastic work WA have done to establish sales and distribution channels in India. East Coast Australia successfully had 33 growers and 18 packers register for India, and at the time of this article, it was yet to be understood from DAFF the final costs for accreditation.

Fresh and Secure Trade Alliance (FASTA) Update

Over February and March, AAL, in conjunction with all FASTA Supply Partners, including DAFF, have been working hard to fine tune our FASTA Market Access R&D Plan. Also, with the assistance of industry, the final draft was agreed, and will be delivered to the FASTA Governance Committee for endorsement. Under the tight confidentiality arrangements, particulars of the draft plan are yet to be made public. It is expected the Plan will be accessible to industry soon after FASTA Governance Committee has approved. Nonetheless, AAL can report that the Plan shall help deliver what we all hope to be improvements in critical data to supplement existing data packages.

24

NEWS

TALKING AVOCADOS AUTUMN 2024

Marketing activities abroad

By Troy Agosti, International Marketing Manager, Hort Innovation

Recently completed retail programs

As part of the international marketing program, a series of activities were conducted from October 2023 to February 2024 in key export markets such as Japan, Thailand and the Gulf Cooperation Council (GCC) region.

Highlights of activities in key selected markets included:

- **Japan** - A comprehensive retail program involving major importers (AIS, KIFA, RB Foods) and key retailers (AEON, Seijo Iishi, Don Quijote, Lepa) was completed in February, simultaneously with the participation of Avocado Australia at the Supermarket Trade Show in Tokyo. The Supermarket Trade Show attracted almost 76,000 visitors, which was 121 per cent more than last year and the largest since the outbreak of Covid-19. The avocado booth was well located, with the claw machine and soft toys attracting many visitors. The excellent quality of avocados tasted led to a higher number of business meetings than last year.
- **Gulf Cooperation Council (GCC) Region** - The program was spread across the entire region in collaboration with Lulu Hypermarkets with an emphasis on the brand ambassador program with cricket personality Brett Lee. Australian Avocados also took part in the GulfFood trade show in Dubai, a very successful event for the participating stakeholders. Several meetings with importers, retailers and distributors were conducted during the trade show and supermarket visits.
- **Thailand** - A comprehensive retail program with sales-driven activities was executed with multiple launch events at each of the participating retailers. Key retail partners included

Makro, Tops and Gourmet Market where in-store displays and sampling sessions were conducted, as well as online promotions.

Upcoming campaigns

Malaysia, Singapore, Hong Kong and India are the focus of upcoming campaigns.

The retail program in Malaysia runs until mid-July and involves 120 participating stores hosting 344 active selling sessions. The estimated reach is 2.6 million shoppers and 100-150 trade numbers. E-commerce and social media promotions will complement the in-store program.

Key visuals and merchandising have been confirmed for the retail program in Singapore, where staff training is being prepared ahead of the in-store sampling sessions.

Running from mid-April to June, the Singapore program will involve 20 stores and 164 active selling sessions, reaching an estimated 164,000 people.

An online campaign promoting gifts-with-purchase is expected to reach 250,000 people.

Four retail partners will be involved in the retail program in Hong Kong from March-July, with 528 stores participating and hosting 140 active selling sessions.

The program planned for India also involves four selected retail partners, whose 75 stores will provide 450 active selling sessions. The estimated reach of this program is 1,250,000 people in the period May-July this year.

Online promotions in India are expected to reach another five million people via retail platforms and social

media, including posts featuring five influencers.

Digital media

Overall, the pattern of growth in reach and engagement through social media activities continued across all channels in February.

Total engagements across Facebook and Instagram were up 11 percent on January's figures, while total reach rose by eight per cent.

Accordingly, cost-per-engagement came in at \$0.002 - an outstanding and extremely cost-effective result.

Brand ambassador program

Australian cricket personality Brett Lee remains front and centre of the international campaign, via video and static imagery that is posted to the Grown in Good Nature web page.

A content calendar outlining the themes of upcoming posts has been developed, each depicting the nutrition attributes and/or versatility of use of Australian avocados.



Brett Lee continues to spearhead the Australian Avocado campaign.

42

MARKETING UPDATE

TALKING AVOCADOS AUTUMN 2024

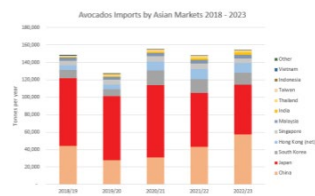
How Asian markets are smashing more avocados

By Wayne Prowse, Fresh Intelligence Consulting

A rebound in imports influenced by China has seen a lift in imports by Asian markets from 132,000 tonnes in 12 months to December 2022 to 154,091 tonnes in the 12 months to June 2023. China and Japan were the largest importers where China increased 6.5 per cent to 57,128 tonnes and nudged ahead of Japan which declined 7.3 per cent to 57,128 tonnes. Overall avocado imports are back on their growth trends after a dip in 2022 caused by various COVID-related issues affecting demand and logistics.

With over 95 per cent of Australia's avocado exports destined to Singapore, Malaysia, and Hong Kong, opening the trade opportunities to other Asian markets remains a key industry priority. However, every Asian market is at a different stage of consuming avocados and becoming a viable market for Australia. In the main, avocado consumption in Asia is still in its infancy compared to North America, Europe, and Australia. Average consumption of avocados for Asia is 0.21 kg per person vs about 5.0 kg for Australia. Even Japan, the largest importer of avocados in Asia consumes 0.6 kg per person. This underlines the growth potential for avocados in the Asian markets. Although most of the supply is coming from Mexico and Peru, there is also significant local production development in China, Vietnam, Philippines, and India to help sustain the growing demand.

China imported less than 100 tonnes per year before 2022 and following initial investment and market development by Mexico and Chile the imports have increased to 57,000 tonnes with Peru accounting for 75 per cent market share. Local production is increasing and could reach 120,000



Source: CIA Global Trade Atlas, ITC TradeAtlas, Fresh Intelligence Consulting

tonnes once the non-bearing trees mature over the next 5 years. Australia is one of several countries applying for market access. Kenya is the latest country to gain market access to China's 1.4 billion-person market. At this stage the per capita consumption is around 0.12 kg per person although this would vary widely across the country with higher consumption in the major cities.

Japan has been the largest importer of avocados in Asia with Mexico being the main supplier. Peru is now the second largest supplier and supplements Mexican supply from April to September. More recently Japan has opened their market to Australia (WA only) and Colombia. Last year Australia supplied 293 tonnes through in the first 5 months of 2023/24 Australia has supplied 745 tonnes, a significant improvement albeit still a small share of the 57,000 tonnes imported last year. Currently Australia competes with Mexico's main season. If East Coast fruit had access, we could compete with

Peru with a quality advantage.

South Korea has seen rapid growth of avocado imports, reaching 16,000 tonnes, influenced by Peru which has driven prices lower and volumes higher than it gained access in 2019. Peru and Mexico are now the main players with counter seasonal supply. The small volumes supplied from New Zealand, United States and Chile have been almost excluded since the access from Peru. The average import price has fallen from \$16.00 in 2018 to \$13.94 in 2023.

United States and New Zealand are the only suppliers to Taiwan which imported just 1,047 tonnes last year. They supply nearly in a counter seasonal pattern for a year-round supply that has scarcely changed over 5 years and the per capita consumption is very low at 0.04 kg per person. The import price levels are among the highest in Asia, which is convenient for the two suppliers though would be disrupted if Mexico or Peru successfully gained

Avocado Export Momentum - Supported by industry & Collaboration

By Flora Zhang, Avocados Australia Export Development Manager

The surge in Australian avocado exports - experiencing a staggering 200% rise in recent years - owes its momentum to strategic initiatives spearheaded by the industry and underpinned by the avocado export strategy plan (2022-26). Avocados Australia (AAL) has been delivering the *Avocado export development and market access* (AV20004) project over the last 2.5 years focusing efforts on enhancing export awareness and capability development, which is pivotal. This project will be wrapped up in June 2024 and a co-design process is currently underway for the next export development project (2024-29).

Prioritising networking events in key markets like Hong Kong, Singapore, and Thailand has been instrumental in forging crucial connections and laying the groundwork for future collaborations. As exporters started exporting larger volume with a set program working with importers or even directly with retailers, the need to use sea freight has arisen and shifted from only 10% being sea freighted to now 55% by sea.

Export Performance: Navigating Challenges, Surpassing Goals

Australian Avocado exports in 6.5 months to 14 January 2024 were 11,570 tonnes which was 127.6 per cent above the same period in 2022/23. Exports in the second week of 2024 were 366 tonnes. Hong Kong, Singapore, and Malaysia accounted for 82 per cent of all exports to date in FY24 while others are increasing share. Japan has recorded 849 tonnes from Western Australia for the 2023/24 season to date. Thailand has recorded 490 tonnes under the new protocol.

Valued by industry & supported through collaboration

The *Avocado market access and trade development* (AV20004) project team work closely with Hort Innovation, industry and government departments and agencies such as Austrade and Trade and Investment Queensland in order to achieve goals such as the successful delivery of the Thailand Launch. For example, the support of the Western Australian Minister for Agriculture has been valuable and this kind of support is important for the industry in overseas markets.

The current trade development project acts as a flagship project leveraging resources such as the Queensland Government's Food and Fibre to Market - Industry Partnerships (FF2M) funding. Trade development initiatives

overseas are a real "Team Australia" effort with involvement from numerous key stakeholders, including industry.

The Export Regional Forums delivered by this project are also valued by industry and provide important information and insights to support the industry's export journey. Guest speakers are experts in their field and add significant value to event programs.

AAL's concerted efforts with Austrade have notably expanded avocado exports, with a study tour of the Middle East, supported by Austrade, boosting exports from 50 tonnes a year to 50 tonnes a month. AAL is actively navigating new protocol markets including India, Japan, and Thailand with the support of Austrade.

Members of the industry, such as The Avolution and Green Skin Avocados, value Avocados Australia and the trade development project.

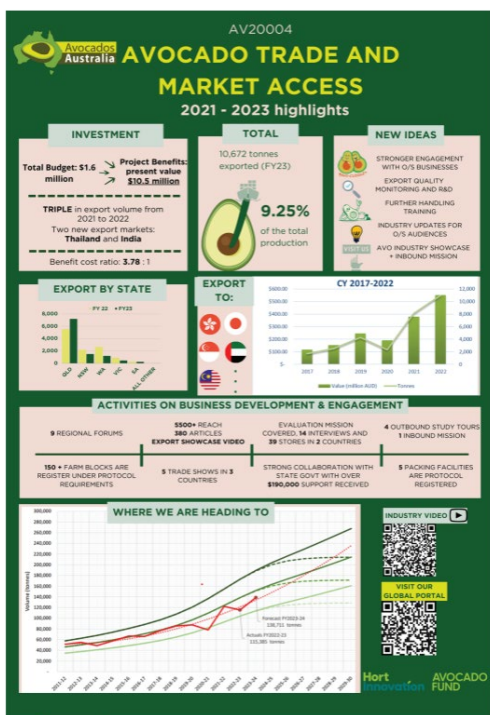
Antony Allen, CEO of The Avolution, emphasized AAL's crucial role: "The organisation is important in the mix. They play a key part in our ability to open new export opportunities."

"In terms of future challenges, there is always competition. AAL assists us in adjusting to competitors in international markets. Having them as a well-rounded Australian representative in trade shows is important in impressing the international market."

Treana Welch, Executive Director of Marketing at Green Skin Avocados, expresses the company's unwavering commitment to the export plan, empowering Australian avocado growers and the industry.

"Growers attend regional forums for the latest updates on exports. Attending the export regional forum in person brings life to the actual plan. It provides an opportunity for networking with other growers and marketers, enabling you to hear the latest reports. If there is an inbound mission held at your region, we encourage you to attend and chat with international delegations to gain firsthand market insights."

"If growers wish to delve deeper into export knowledge, we suggest considering attendance at outbound/inbound study tours organized by AAL. Participating in trade shows fosters invaluable networking experiences, offering growers a profound understanding of overseas market challenges and opportunities."



Market Access Update

By Richard Magney, Avocados Australia

Our market access program progressed a number of key initiatives in the last couple of months of 2023. It was a very busy period in the lead-up to the Christmas break with some great outcomes achieved.

China

November 2023 kicked off with a significant market access project that had been nine months in the making, the Official Memorandum of Understanding (MoU) Signing Ceremony with China Entry-Exit Quarantine and Inspection Association (CIQA) in Beijing, China. The ceremony was witnessed by the recently outgoing Queensland Premier, the Honourable Anna Palaszczuk, the Australia-China Agricultural Counsellor, Leah Catrissa, Trade Investment Queensland CEO, Justin McGowan, Austrade China Commissioner, Janina Patin, WA Department of Primary Industries and Regional Development China Manager, Nathalie Brooks, Trade Investment Queensland China Commissioner, Robert Miller, and many Chinese importers and wholesalers. Importantly, Sheng Wei, a successful Chinese-Australian avocado grower from Bundaberg, also attended and participated in the ceremony.

The MoU was drafted over a period of many months and carefully constructed to allow for crucial projects to help build capabilities toward technical market access. And with this, careful consideration was made to align collaborative work with China's market access authorities and horticultural research institutes to assist in the Fresh and Secure Trade Alliance (PASTA) R&D location. This will ensure we best capture the technical requirements needed for the Department of Agriculture, Fisheries and Forestry (DAFF) to best deliver the most optimised data submission. The MoU ceremony finished with a very enjoyable networking dinner with guests and was a more relaxed environment to develop deeper

relationships with key avocado importers and wholesalers.

As an outcome of the MoU ceremony, came some very important announcements:

1. Riverking, an MoU ceremony attendee, and one of China's largest avocado importers would conduct a trade and research mission to Australia from 16 to 20 December 2023, and visit Western Australia growers and packers.
2. SupuFresh, China's first avocado importer, similarly to Riverking, committed to make an avocado research visit to Queensland in Feb/March 2024.
3. Avocados Australia's (AAL's) MoU partner, CIQA, to make a research and trade delegation mission to Australia in 2024.
4. Shanghai Markets, China's largest fruit importation port, to bring a research and trade delegation mission of key Chinese avocado importers to Australia in 2024.
5. AAL is invited to host a stall to showcase and promote Australian Avocados (under the auspice of a special China customs import permit) at: China Fruit & Veg Fair (April 2024), Shanghai Fruit Expo (September 2024), and China International Import Expo (November 2024).

India

Western Australian desktop registrations and accreditation for India took place in early December 2023 and the first shipment was sent in the week of 18 December 2023. By early January additional shipments were made. AAL will undertake the official India market launch in April 2024 with the support of Australian Avocado India Ambassador, ex-Australian cricketer, Brett Lee. India is shaping up to be a unique but very promising market. Enquiries from importers and wholesalers have been escalating over recent weeks and we expect demand to steadily increase over the remainder of the Western Australia season and into the East Coast season.

CHEMJET TREE INJECTION

Economical, efficient and reliable to control pest diseases by injecting trees.

PHOSPHORUS, PESTICIDES, FUNGICIDES, FERTILISERS & TRACE ELEMENTS

CONTACT US FOR MORE INFORMATION

Phone: 07 122 100 100 Fax: 07 122 100 088 Email: info@chemjet.co.uk www.chemjet.co.uk

CHEMJET TREE INJECTION

EASY TO USE

BUILT TOUGH 1 YEAR WARRANTY

REDUCES STRESS ON TREE

LOW INJECTION PRESSURE DOES NOT DAMAGE TREE

INJECTION UPTAKE IMPROVES

MULTIPLE INJECTIONS PER DAY

General News

Leading Chinese avocado importer visits Australia

By Anna Petrus, Avocado Australia

From 16 to 20 December 2023, Avocado Australia's Chair, Brad Rodgers, and Richard Magney, Avocado Australia's Chief of Export for Market Access, assisted with hosting a trade visit by Oliver Peng, the Global Avocado Buyer for Riverking, one of China's largest fruit importers. Oliver made a research visit to Western Australia to meet avocado growers, packers, to learn about our production practices and further build strategic alliances.

The Honourable Jackie Jarvis MLC, WA Minister for Agriculture and Food, Forestry, Small Business, met with Oliver to discuss opportunities for Western Australian avocado growers. Oliver visited Delroy Orchard, The Avocado Collective, Forty's Food Orchard, Bendetti's Sons and Jasper Farms. Our sincere thanks go to the growers and packers who took part in the trade visit. This visit further builds on the gains achieved from the recent Memorandum of Understanding (MOU) signed that took place on 10 November 2023 in Beijing with the China Entry-Exit Quarantine Inspection Association.

Brad Rodgers, as Avocado Australia's Chair, and Wang Xin, the China Entry-Exit Inspection and Quarantine Association's President, signed the MOU that aimed to build capabilities toward technical market access. This MOU signing ceremony was an important forward step toward market access and was witnessed by then-Premier and Minister for the Olympic and Paralympic Games, the Honourable Annastacia Palaszczuk MP.

Avocado Australia has made it a priority to increase Australian avocado exports and John Tyas, Avocado



From left to right: Ben Weller (Chair Fresh & Delroy Orchard), Brad Rodgers (AAL Chair), the Hon. Jackie Jarvis MLC, Oliver Peng (Riverking), Richard Magney (AAL Chief of Export - Market Access), and Sophie Cremasco (The Avocado Collective).



At the visit with Delroy Orchard.

Australia's CEO, believes the MOU signing was an important milestone. "The MOU signing ceremony was an important next step in our market

access journey and I believe it paved the way for Riverking's trade visit. We know there is a lot of interest from China in Australian avocados."

WINTER 2024

Data News

Export trade exceeds 20,000 tonnes

By Wayne Provic, Fresh Intelligence Consulting

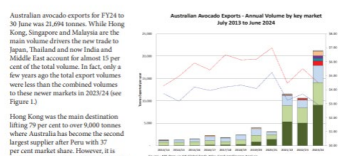


Figure 1. India is the newest market access gain and Australia is building a strong presence in a very small yet exponentially growing market sector. Australia has supplied 563 tonnes to date into the market that has imported 5,000 tonnes in the last 12 months, almost double the previous year. Tanzania is the main supplier driven by the marketing effort of the Westfalia brand.

Finally trade to the Middle East has reached 1,000 tonnes in 2023/24, up from just 49 tonnes a year ago. This is in no small way due to the industry marketing efforts in the Middle East.

Global avocado trade in 2023 increased 17 per cent to 1.8 million tonnes. While 88 per cent of global trade is absorbed by North America and Europe, mostly supplied from Latin American producers, the avocado trade into Asia markets lifted 29 per cent last year to 184,000 tonnes.

China has extended Japan as the largest importer taking 64,000 tonnes during 2023 while Japan, traditionally the

largest importer in Asia, took in 62,000 tonnes. Peru and Mexico dominate the suppliers to these North Asian markets.

Peru was the largest supplier of avocados to China holding 76 per cent market share and lifted 49 per cent to 50,000 tonnes followed by Chile (19% share) and Kenya (6.6%). Mexico, which pioneered the early avocado trade to China supplied 2,000 tonnes or 1.1 per cent share demonstrating a changing fabric of suppliers.

Mexico remained the largest supplier to Japan after lifting 19 per cent to 15,000 tonnes while Peru increased 19 per cent to 13,000 tonnes. Australia became a more serious player in the Japan market supplying 954 tonnes jumping into No. 3 position.

South Korea imports eased 6 per cent to 13,000 tonnes again led by Peru with 41 per cent market share followed by Chile and Mexico.

India is emerging as the next big market for avocados where imports increased 112 per cent to 5,000 tonnes mostly supplied from Tanzania. Australia and Kenya also entered the Indian market

TALKING AVOCADOS WINTER 2024 NEWS 17

Export News

Exploring the avocado opportunities in India - Recent study tour observations

By Flora Zhang, Avocado Australia



India, a country renowned for its diverse agricultural landscape, has recently seen a growing interest in the fresh produce category, particularly avocados. On a recent study tour to India, following the Australian avocado launch activity in Delhi, together with growers and exporters, we had the unique opportunity to delve into the supply chain, consumer preferences, retail structure, environmental factors, and the competitive landscape for avocados. The insights gained from this tour are invaluable for understanding the challenges and opportunities in the Indian avocado market.

Supply Chain Dynamics

The avocado supply chain in India is still in its nascent stage, characterized by a mix of domestic production and imports. Domestic production of avocados is concentrated in specific regions with favourable climatic conditions, such as the southern states of Karnataka and Tamil Nadu. Most of the avocado grown in India are green skin types, used mainly in drinks.

INDIA IN NUMBERS

Total Population	1.41 billion
Vegetarian Population	30 percent
Non-Vegetarian Population	70 percent
Population < 25 years	More than 50% of the total population
Middle-Class Population	400 million
Internet Users	700 million
Number of food and grocery retail outlets	12.0 million

TALKING AVOCADOS WINTER 2024 NEWS 19

International marketing momentum rolls into 2024

By Troy Agosti, International Marketing Manager, Hort Innovation

Live retail programs

A series of activities are being conducted in Japan, Thailand and the GCC (Gulf Cooperation Council) region as part of the international key-funded marketing program delivered through Hort Innovation.

Other markets – such as India, Hong Kong, Malaysia and Singapore – are in the preparation stage ahead of activation in our autumn.

Below are highlights of activities across the key selected markets (as of end of November):

- Japan (September-December 2023) – A comprehensive retail program including display, samplings and promotional deals is being conducted alongside with a food services promotion in partnership with restaurant chains.
- Middle East (October-December 2023) – The retail program is still in train across the region, and all the point-of-sale materials highlighting the collaboration with brand ambassador Brett Lev have been installed in Lulu Supermarkets.
- Thailand (October-December 2023) – The retail program is now live in the country, with launch events attracting an abundance of attention and engagement.
- India – This program is currently on hold and likely to start around April 2024 after a series of launch events in major cities.

Feedback from international markets has been positive. Japan's importers have praised the excellent quality of Australian avocados which has reflected in the sales results.



Above: Launch events in Thailand have attracted an abundance of attention and engagement.

It was also brought to our attention that avocados exported to Japan from other regions are tending to be more expensive than in the past, closing the gap with Australian fruit. The quality of the product has therefore become the first criteria of selection.

In the GCC region, stakeholder discussions have generated insightful feedback, including one importer expressing a keen interest to expand its avocado portfolio and explore a long-term collaboration for enhanced awareness of Australian avocados.

In Thailand, importers are also planning to bolster promotion of Australian avocados – with a particular emphasis on the ripening and selection processes.



Above: A sampling session in Thailand.

TALKING AVOCADOS SUMMER 2024

MARKETING UPDATE

55

Market Access Update

By Richard Magney, Avocados Australia



China

Avocados Australia (AAL) has several recent engagements with the Department of Agriculture, Fisheries and Forestry (DAFF). DAFF's Market Coordination and Strategy team presented at Avo Connections providing an overview of the general market access landscape for China. We remain patient for the outcome of positive news for the current technical negotiation of Australian mainland apples and blueberries. AAL continues to press our ambition for access to China. It was revealed by Wayne Prowse at Avo Connections that China has now surpassed Japan as the largest volumetric importer of avocado in Asia. This is a very encouraging announcement and only helps empower AAL to continue working hard to build credentials and capabilities toward technical market access to China.

AAL has been awarded a Hort Innovation levy funded project (AV23012 - Avocado China market study tour). The project includes an outbound study tour to China to help industry learn about the supply chain and market conditions. The delegation participants have been selected from an EO process which focuses on businesses that can show strong levels of existing exports with preference toward businesses that have accredited properties for protocol markets. The study tour will be undertaken in late August and the findings will be reported in subsequent Talking Avocados editions.

Riverking inbound trade visit

Riverking is one of China's largest fruit importers including a significant investment of their own in Chilean cherry production. Riverking is a strong trader in avocado and import around 400 containers per annum. Riverking completed the installation of avocado ripening facilities in 2023 to cater for the increasing demand for avocados and retail 'ripe n ready' avocados.

Riverking visited Queensland in June, their second visit in 7 months (coverage of their visit appears in this issue). Previously, Riverking visited WA farms and packhouses in December 2023, and extended their delegation visit this time with senior global procurement leaders. I believe this is a steadfast sign for their growing desire to access the best of Australia's avocado production. Riverking's visit was supported by Trade Investment Queensland and leading central Queensland growers and exporters: Donovan Avocados, Brooklet Farms, and Costa Group. Avocado Australia's China Study Tour in August will make a visit to Riverking's Global Headquarters to meet their executive team and General Manager Avocado Procurement and take a walk through their recently completed ripening facilities.

Richard Magney (AAL's Chief of Export - Market Access) is currently based in China for one month to progress our market access strategy with various key engagements in market.

AAL is officially a new Foundation Member of AustCham China. For this new membership, AAL was invited to a private dinner, July 1, with Australia's Ambassador to China, His Excellency Mr. Scott Dewar. The dinner was an opportunity for the Ambassador to debrief Foundation Members on his interaction on the Chinese Premier Li Qiang's visit to Australia. Whilst visiting Beijing, AAL will undertake ongoing market access capability building exercises with Trade Investment Queensland, AAL MoU Partner China Entry-Exit Inspection and Quarantine Association, China Chamber of Commerce, Food Staff & Natural Products, China Agricultural Wholesale Markets Association, and China Fruit Marketing Association. The visit will also help to fine tune the itinerary for the AAL China Study Tour and participation in China International Fruit Expo.

TALKING AVOCADOS WINTER 2024

NEWS

23

Avocados Australia's India Launch a success!

By Flora Zhang and Anna Petrou, Avocados Australia



On Thursday 9 May, members of the Australian avocado industry and Avocados Australia representatives came together at the Australian High Commission in New Delhi for the official India Launch to celebrate the entry of Australian avocados to the Indian market. The event was attended by over 100 people and was a resounding success. The Australian avocado industry has much to learn about the Indian market in order to develop this market over time. The India Launch was a terrific starting point that recognised the contributions of key stakeholders and also set the scene for future marketing activities that will support the supply chain and grow the market there.

A press conference was held before the launch in which over 30 leading Indian media outlets asked questions of Nick McCaffrey (Australia's Deputy High Commissioner to India), Brett Lee (ex cricketer and Australian Avocados Ambassador), Julie Bird (Chair of Hort Innovation), Brad Rodgers (Chair of Avocados Australia), and John Tyas (Avocados Australia CEO). A number of Australian exporters, growers and Indian importers and other stakeholders took part in the celebration.

The avocado market in India is gaining momentum. Avocado consumption has increased in India, with global demand also witnessing a significant surge over the past decade. Avocado is a healthy addition to all diets and is perfect for those eating vegetarian diets.

The Australian avocado industry is growing rapidly producing just over 115,385 tonnes of avocados in 2022/23

and Australian production is forecast to increase strongly over the next few years to approximately 170,000 tonnes by 2026. In line with this production growth, Aussie growers are committed to developing new overseas markets such as India. Increased exports will be critical for the future viability of the Australian avocado industry.

At the India Launch, Brett Lee proved to be an outstanding asset for the Australian avocado industry. As an excellent ambassador he reinforced the benefits of eating avocados based on his own personal experience and knowledge. Indian journalists were enthusiastic about Brett Lee and Australian avocados.

Brett, with the help of a local Indian chef, helped prepare some avocado recipes during the launch and after the launch Brett took part in a game of cricket.

Brett said he was excited about the partnership.

"I am thrilled to be associated with Australian avocados and with the fruit that embodies the essence of health. Throughout my journey, I have prioritised nourishing my body with good food, which is why I'm excited to combine this passion with my deep affinity for India and its rich culture. I look forward to championing the exceptional taste, quality, and adaptability of Australian avocados both at home and abroad."

During the launch Nick McCaffrey said that "the introduction of Australian avocados to the Indian market signifies a promising partnership between our nations."

24

NEWS

TALKING AVOCADOS WINTER 2024

Australian avocado industry came together for Avo Connections

By Anna Petrou, Avocados Australia



On Monday 3 June Avocados Australia's annual forum, Avo Connections, brought over 200 industry stakeholders together at the Melbourne Convention Centre to hear a thorough update on the current status of the industry, the opportunities and challenges, and some of the key initiatives underway. This event was regarded by many as a valuable networking event, and we know that industry stakeholders appreciated having the opportunity to take part in the panel sessions and ask questions.

John Tyas, Avocados Australia's CEO, set the tone with an industry update that outlined the current heavy supply and the range of levy funded projects and activities that are underway to address this. Michael Harvey (Rabobank) provided a financial perspective and global trends, Felicia White and Emma Day (Hort Innovation) provided a comprehensive overview of the domestic marketing activities and plans, and all other speakers provided valuable insights in the areas of food industry trends, fruit quality, international marketing, global export trends, and the Australian Macadamia Society shared their India export journey.

You can access all of the Avo Connections presentations on our Best Practice Resource (BPR) at aavocados.org.au/best-practice-resource/library/. Just log in and you will automatically be directed to the BPR Library. Look under the "Event Proceedings" heading. If you need assistance, please contact us on 1300 303 971 or email admin@avocados.org.au.

If you operate in the Australian avocado industry and you don't have access to the BPR, you can apply to access online here: aavocados.org.au/best-practice-resource/registration/ or use the QR code provided.



26

NEWS

TALKING AVOCADOS WINTER 2024

Leading Chinese avocado importer returns to Australia

By Anna Petrou, Avocados Australia



Riverking, one of China's leading avocado importers, took part in a trade visit from 25 to 30 June whereby this time they visited the east coast of Australia. Riverking's avocado procurement leaders, Sean Chen (Global Import Director) and Oliver Peng (Senior Manager), met with key stakeholders and some of Queensland's leading avocado growers, packers and exporters in and around Bundaberg. They visited Costa Group, Donovan Avocados and Brooklet Farms. The aim of the visit was to learn about Australia's production practices and further build strategic alliances with stakeholders involved in the Australian avocado industry.

In the group photo pictured above, the Riverking representatives (on the right), were joined by Flora Zhang (AAL's Export Development Manager), Matt Klein (AAL Deputy Chair & NQ director), Philippe Demitieux (Bastion agency), Lucy Philip (AAL Central QLD/Sunshine Coast director), and Matt Dorrain (Dorrain Farms).

Avocados Australia's CEO, John Tyas, saw this trade visit as a special opportunity to show that our industry are leading providers of quality avocados.

"Avocados Australia has made it a priority to increase Australian avocado exports and I believe this visit by Riverking paves the way for further engagement with our key Chinese stakeholders," he said.

"Avocados Australia is building a strong and enduring relationship with Riverking. AAL met with Riverking's President and executive team at their Shanghai Head Quarters in 2023 and they attended a special Memorandum of Understanding Signing Ceremony between Avocados Australia and the China Entry-Exit Inspection and Quarantine Association in the same year."

Lachlan Donovan, from Donovan Avocados, was one of the growers/exporters that hosted Riverking. He values Riverking's interest in the growing region.

"We know there is a lot of interest from China in Australian avocados and hosting visits like this one from Riverking is a logical step for us to take to progress our relationships with Chinese stakeholders."

Riverking's visit to Queensland was covered by local and international media, an example is online here: <https://bit.ly/3d8W5E5>.

Avocados Australia is doing everything it can to progress China market access and is undertaking comprehensive engagement with key stakeholders - both in Australia and in China - and working closely with Federal and State Governments. Details of our progress is reported in industry in our email communications and in the Market Access Update articles that appear in Talking Avocados magazine, and our members-only newsletter, Avo Insider.

28

NEWS

TALKING AVOCADOS WINTER 2024

India Inbound Trade Mission to Queensland a success

By Anna Petrou, Avocados Australia



India Inbound Trade Mission participants visiting avocado orchards in South Queensland.

In April an India Inbound Trade Mission to Queensland took place supported by Trade and Investment Queensland (TIQ) in association with Avocados Australia. This trade mission provided five days of valuable networking experiences for visiting Indian importers and retailers and included visits to avocado orchards, packing sheds, processing facilities along with two networking events and more.

Importantly, the mission provided Queensland avocado growers, packers and exporters with the opportunity to establish relationships with Indian importers and retailers and to learn more about the Indian market.

The Inbound Mission toured the Indian delegates across Southeast, Central and North Queensland. Our sincere thanks go to Sunnyspot Avocado, Dona Fort Packing, Simpson Farms, Costa Group, AustChilli Group, and Green Skin Avocados for being involved and hosting the delegation.

While the trade mission delegates visited Sunnyspot in South Queensland, ABC Landline filmed part of the trade mission, and this appeared in their 'Australian Avocados in India'

segment that aired on their program on Sunday 9 June 2024. Landline also interviewed John Tyas, Antony Allen (The Avocadon), Daryl Boardman (Sunnyspot), an Indian importer, and a number of other key stakeholders. You can see the segment online using this link - <https://bit.ly/3VNTkKs> - or use the QR code provided on your mobile.

For information

For more information about this inbound trade mission, and future missions or to find out more about exporting avocados contact Flora Zhang, Avocados Australia's Export Development Manager, email export@avocadosaustralia.com.au or call 07 3846 6566.



TALKING AVOCADOS WINTER 2024

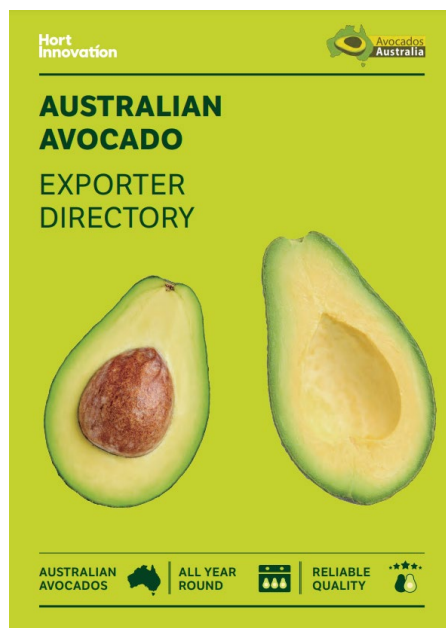
NEWS

29

Appendix 5 - Extract of the Exporter Directory and pitch pack

[AVO AUS Exporter-Directory WEB v3 Harvestaadded SeasonZonesC2.pdf](#) [View the Exporter Directory here](#)

[View the Pitch Pack here](#)



THE AUSTRALIAN AVOCADO INDUSTRY OVERVIEW

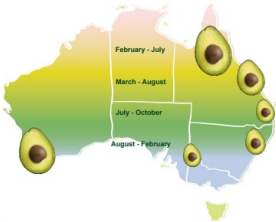
In 2021-22 Australian avocado growers produced over 122,000 tonnes of avocados.

The updated long-term forecast suggests Australia's avocado production is expected to continue to increase to about 190,000 tonnes by 2026. So Australian growers and exporters can reliably supply fresh avocados to overseas markets.

Australian avocado growers are dedicated to growing quality avocados. You can expect clean, high quality and delicious avocados from Australia, and this is due to our orchard practices, and compliance with rigorous quality assurance programs.

Great care is taken to meet all of the necessary guidelines and standards required to safely export our avocados to our overseas customers. Australian avocado growers use sustainable farming systems and ensure fair work practices.

Plentiful land, clean water, well drained soils, and our great environment all work together to create perfect avocados. Our large country has a wide range of climates including tropical, sub-tropical, Mediterranean and temperate. This allows us to provide Year-round high-quality avocados 12 months of the year.



EXPORTER DIRECTORY

FIRM RIPE

Deforms 2-3mm with slight thumb pressure

Slicing Ready
Good for slicing

Highly susceptible to bruising from squeezing or dropping

0.7-1.0
44-56
41-53

RIPE

Deforms easily with gentle hand pressure.

Smashing ready
Good for slicing, smashing, spreading

Highly susceptible to bruising by squeezing or dropping

0.4-0.6
33-43
32-40

SELECTING TIPS FOR A PERFECT SHEPARD AVOCADO

Bright green skin, even when ripe!

Firm and bright green - ready in 1-2 days.

Hard and bright green - ready in 2-3 days.

Gently press the neck of the avocado. If it gives a little, it is ready to eat now.

Gently Press Here

17