



Exporting fresh avocados to Europe

The European import value of avocados almost tripled in the period between 2013 and 2017. This upward trend is driven by consumer demand for ready-to-eat and health food. It creates opportunities for producers and exporters, especially for the Hass avocado variety, although competition is increasing. The best opportunities are in large consumer markets such as France, Germany, Spain and the UK, which are often supplied through the Netherlands.

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1 . Product description

Avocados (*Persea americana*) are classified into four main types: Guatemalan, Mexican, West Indian and hybrids. Commercial varieties include:

- Hass (Guatemalan)
- Fuerte (hybrid)
- Ettinger (hybrid)
- Pinkerton (hybrid)
- Reed (Guatemalan)
- Ryan (Mexican/Guatemalan)
- Zutano (Mexican)

The Hass avocado, a Guatemalan race with pebbled black skin, is the main planted variety today. There are new Hass varieties available, such as Lavi Hass, Lamb Hass and Gem Hass. These Hass sub-varieties help extend the supply season.

Table 1: Combined Nomenclature (CN) commodity code for fresh Avocados

Number	Product
0804.40.00.10	Avocados, fresh

Source: Eurostat Comext.

Information on quality, size, packaging and labelling requirements for avocados can be found in:

- The [UNECE standards for avocados](#)
- The [Codex Alimentarius Standard for avocados](#) ('Food code' of WHO and FAO)
- The [General Marketing Standards of Regulation \(EC\) No. 543/2011](#)

Quality

The development of the avocados should have reached a physiological stage, which will ensure a continuation of the ripening process. The UNECE standards require a minimum dry matter content of 21% for Hass and of 20% for Fuerte (maturity requirement). Suppliers use different [measuring methods](#) and product standards may differ per country and per variety. For the Hass variety, Europe often prefers a dry matter of 23%. For importers that ripen avocados 23% of dry matter is a minimum.

Avocados are generally classified into [three classes](#) according to quality:

- Extra Class
- Class I
- Class II

Europe almost exclusively maintains class I as a minimum.

Avocados should, at the very least, be:

- intact
- clean and sound
- free from pests
- free from damage
- free of abnormal external moisture
- have a stalk no longer than 10 mm in length
- be in a condition to withstand transport and handling

Size and packaging

Fresh avocados are classified according to Size Codes 1 to 30, with a minimum weight of 123 grams (or for Hass 80 grams). In Europe, the preferred sizes for Hass avocados range between size 16 and 20 (for the Fuerte variety 14 to 16).

Packaging requirements differ between customers and market segments. They must at least be packed in new, clean and quality packaging to prevent damage and protect the product properly. Discuss packaging requirements with your customers.

Some general characteristics are:

- 4 kg cardboard boxes, often wholesale packaging
- 10 kg plastic or cardboard crates, often for importers that ripen and re-pack avocados

Make sure to use a controlled atmosphere during the logistical process.



Photos: [ICI Business](#)

Labelling

Consumer packaging labelling must comply with the rules and regulations applying to the European market:

- Labels cannot contain any toxic ink or glue
- Products must be traceable using a coding system for individual lots
- Labels must be in the English language, unless buyers indicate otherwise.

The following items should be on the label of fresh fruit and vegetables:

- Product name, including the name of the variety

- The commercial identification: class, size (code), number of units, net weight
- Name and address of exporter, packer and/or dispatcher
- Country of origin
- Traceability code
- Optional: certifications, for example organic (including name of inspection body and certification number)

If your product is pre-packed for retail, check the additional requirements in the [Codex General Standard for the Labelling of Prepackaged Foods \(CODEX STAN 1-1985\)](#) or [Regulation \(EU\) No. 1169/2011](#)

For more information on labelling, packaging and quality see also: [Codex Alimentarius Standard for avocados](#) (CODEX STAN 179-1995). Always discuss additional requirements with your buyer.

2 . Which European markets offer opportunities for exporters of avocado?

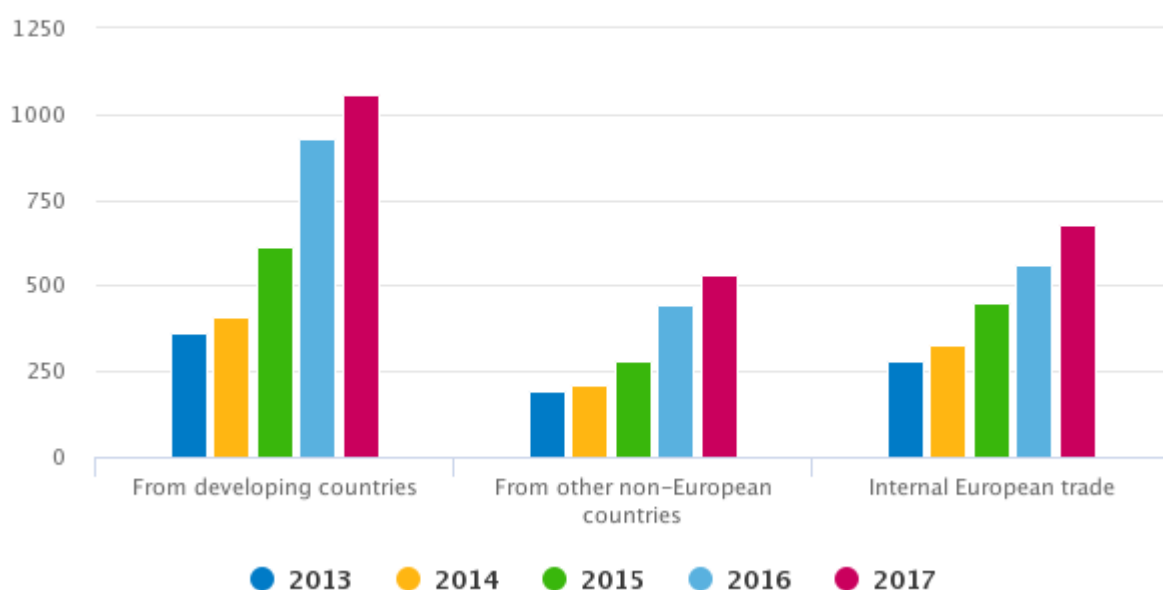
Avocado imports from developing countries continue to grow

Imports from developing countries such as Peru, Mexico, South Africa, Kenya and Colombia are increasing, and their value exceeded a billion euros for the first time in 2017 (see Figure 1). The remaining European imports, worth around half a billion euros, were mainly supplied by Chile (no longer considered a developing country by the OECD) and Israel.

Since 2015, the total value of imported avocados has developed faster than the volume, indicating good prices for suppliers. In the short term, you can expect the demand to remain high and increasing.

Figure 1: European import of avocados

in € million



Source: ITC Trademap

Strong consumer demand all over Europe

Based on production and trade statistics, the total European consumption of avocados is approaching 500 thousand tonnes, which is around one kilo per capita. This consumption rate is still

relatively low compared to, for example, the USA where people consume four times as much avocados.

Traditionally France is the largest market for avocados and continues to be so. The United Kingdom, Spain and Germany are also experiencing very strong growth.

Scandinavian countries are much smaller in terms of population but maintain one of the highest consumption rates of avocados thanks to strong promotion and the attention to health food.

Tip:

- Avoid the mistake of prioritising quantity over quality when exporting to a growing market. In the end, wholesalers and retailers demand good quality produce and trustworthy suppliers.

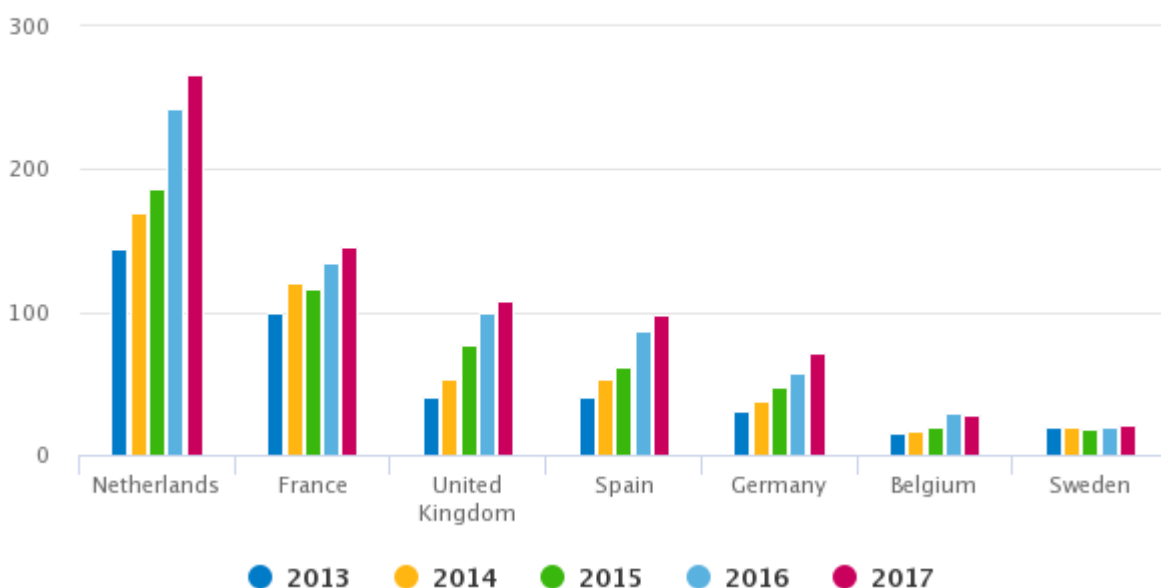
The Netherlands is the main trade hub for avocado

The Netherlands is the second largest non-producing exporter of avocados in the world. The country is also responsible for almost half of Europe's avocado imports. From there, large volumes are re-exported to Germany, France, Scandinavian countries and in lesser extent to other countries.

Large 'final' destinations in Europe are France, the UK and Germany. In general, the European market is expected to grow further in the coming years. Nevertheless, the market will remain very competitive and importers favour larger producers because of supply certainty.

Figure 2: Main European importers

in 1,000 tonnes



Source: ITC Trademap

Tips:

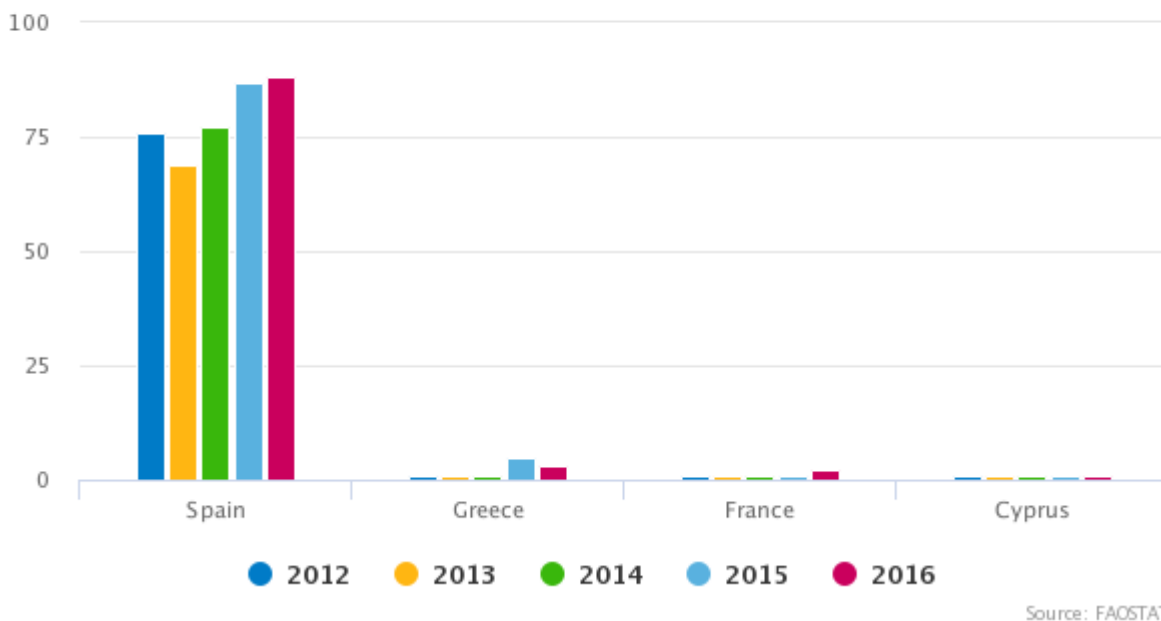
- Make sure that your product is of competitive quality and find trustworthy partners in Europe to optimally benefit from the growing demand.
- Consider using the established trade routes and find an importing partner in the Netherlands. The Netherlands has become the dominant importing country for the European market.
- Find a European importer by presenting yourself at fairs like [Fruit Logistica](#) or [Fruit Attraction](#).

Spain complements production with import

With around 87 to 88 thousand tonnes per year in 2015-2016 according to FAOSTAT (and 55 thousand in 2017 according to [other sources](#)), Spain is the most important producer of avocados in Europe (see Figure 3). But Spanish traders also purchase more and more avocados from abroad to complement their own season and comply with international supply contracts. This makes Spain Europe's third-largest exporter of avocados after the Netherlands and Belgium.

Portugal also harvests around 14 to 18 thousand tonnes per year, but these data were not available at the time of writing.

Figure 3: European production of avocados
in 1,000 tonnes



Tips:

- Make sure that your production expansion is in line with market demand by keeping an eye on market developments in the European avocado market and beyond, for example on [Freshplaza](#), [FruiTrop](#), and [FreshFruitPortal](#).

- Find latest production statistics for fresh avocado production at the Statistics division of the Food and Agriculture Organisation ([FAOSTAT](#)).

Hass most popular avocado variety

The green varieties are losing market share to Hass quickly. Green varieties are mostly sold loose or in small nets, while Hass dominates the market for ready-to-eat avocados. Green varieties are still sold because they have a different harvest period, but Western European countries mainly favour the taste and ease of the ready to eat Hass variety.

The green varieties are more commonly seen in Italy and Greece. There are still prospects for growth for green avocado consumption in Eastern Europe and other middle-income countries that experience economic growth, although these markets do not have the same volume as Western Europe yet. In these countries, the Hass variety is expected to replace a large part of the green avocado consumption in the long term as well.

Tips:

- Take account of market preferences when planning new plantings. In general, consumer preference for green skin avocados is decreasing.
- Stay up to date with consumer preferences in growing consumer markets, such as the Scandinavian countries and Eastern Europe. For example, look for information with local distributors in these countries.

3 . What trends offer opportunities on the European market for avocados?

[CBI's Trends](#) study provides you with general trends in the European market for fresh fruits and vegetables. This section provides more details about specific trends in the market for fresh avocados.

Convenience fruit

The consumption of avocado has been supported by new developments such as 'ready to eat' and, more recently, frozen avocado. Consumers are prepared to pay a premium price for high quality 'ready to eat' avocados. The added value of taste and ripening fruit is setting a new standard.

Avocados that are ripened in Europe and sold as 'ready to eat', should be picked when mature but well before ripening stage. Fruit must be picked with a dry matter not lower than 23% and must be uniform throughout the parcel.

Tip:

- Make sure that your harvest and cold chain are perfectly managed. This is crucial to reach

the right quality that is expected by the European ripening companies and retailers.

Growing interest in sustainable fruit

Environmental and social issues are becoming more and more important in the supply of fresh fruit and vegetables. This is also the case for avocados, for example in water usage during production.

Certification schemes that are in line with the [Global Social Compliance Programme \(GSCP\)](#) will have a higher chance of being accepted by European supermarkets.

The general [trends in fresh fruit and vegetables](#) provide a further insight into different types of certifications. See the buyer requirements below for fair and sustainable fruit production for more information.

Tip:

- Check the [Global Social Compliance Programme \(GSCP\)](#) website for more information about social and environmental conduct.

Attention to health food

Consumers in Europe are becoming more aware of health issues and pay more attention to their diet. Avocado fits well in this trend thanks to its good fats, fibre, vitamins and minerals. These health aspects are used in the [promotion of avocados](#) and contribute to the increasing consumption throughout Europe.

Organic niche

Thanks to the increased attention to health and environment, the interest in organically produced avocados is also growing. The current supply does not fully satisfy the market demand due to the difficulty of producing organic avocado.

Organic avocados are a growing niche and sold by both specialized and main retailers. It can be an opportunity for growers that are able to produce according to the strict guidelines linked to organic production methods, to sell their produce as organic. See the [buyer requirements for organically produced fruit](#) below for more information on the requirements.

Tip:

- Read more about organic farming on the [Soil Association website](#).

Fluctuation in supply and price

Avocado has been a growing market for several years. Changes in production planning and climate result in variation of supply and therefore also in prices. In 2014 prices dropped due to an oversupply, while in 2015 and 2016 they started at a higher level because of poor or postponed harvests in Peru and Chile. In general, importers in the European market favour larger producers because of supply certainty.

Demand has remained strong throughout 2018, but prices have dropped steeply again due to an oversupply. Dealing with products like avocados that are growing in popularity can also be risky. This has resulted in a large number of (new) producers and it is hard to predict when supply will exceed demand, or the other way around.

Tip:

- Organise your supply well; get producers together or join cooperatives to increase your export potential.

Strong promotion of avocados

In order to increase the demand for avocados, associations from producing countries such as [Peru](#), [Chile](#) and [South Africa](#) launch promotional campaigns. Similar initiatives can be seen in Europe, such as an investment from the fresh sector in a [restaurant chain dedicated to avocados](#). These promotional offices and activities stimulate the consumption and are important for all companies that are involved in the avocado business.

Tip:

- Join or cooperate with active associations that promote avocados from your home region.

4 . What requirements should avocados comply with to be allowed on the European market?

Buyer requirements can be divided into (1) musts, requirements you must meet in order to enter the market, such as legal requirements, (2) common requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market, and (3) niche market requirements for specific segments.

The food safety requirements for avocados are the same as for other fresh fruit and vegetables. You can find a complete overview in:

- The general [buyer requirements for fresh fruit and vegetables](#).
- The [Trade Helpdesk](#) that provides an overview of export requirements for avocados (code 08044000) per country.

What legal and non-legal requirements must your product comply with?

Minimise pesticide residues

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental damage, the EU has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the EU market. Note that buyers in several Member States such as the UK, Germany, The Netherlands and Austria, use MRLs which are stricter than the MRLs laid down in EU legislation.

Tips:

- Find out the MRLs that are relevant for avocados by consulting the EU [MRL database](#) in which all harmonised MRLs can be found. You can search on your product or pesticide used. The database shows the list of the MRLs associated to your product or pesticide.
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Read more about [MRLs on the website of the European Commission](#). Check with your buyers if they require additional requirements on MRLs and pesticide use.

Complying with phytosanitary requirements

Fruit and vegetables exported to the EU must comply with the EU legislation on plant health. The European Commission has laid down [phytosanitary requirements](#) to prevent introduction and spread of organisms harmful to plants and plant products in Europe. These requirements are managed by the competent food safety authorities in the importing and exporting countries.

Tips:

- Verify with the [National Plant Protection Organisation](#) or food safety authority in your country if and under which condition you can export avocados to Europe. These authorities normally work with international standards, but always check with your buyer as well.
- Read more about [plant health in the EU Export Helpdesk](#).

5 . What additional requirements do buyers often have?

GLOBALG.A.P. and other certifications as guarantee

Since food safety is a top priority in all EU food sectors, you can expect most buyers to request extra guarantees from you in form of certification. The most commonly requested certification for avocado is [GlobalG.A.P.](#) GLOBALG.A.P. is a pre-farm-gate standard that covers the whole agricultural

production process, from before the plant is in the ground to the non-processed product (processing is not covered). The need for GLOBALG.A.P. also depends on the destination country, market conditions and market channel. For example, it has become nearly impossible to supply northern Europe without GLOBALG.A.P., since it is a standard requirement for most supermarkets.

Examples of other food safety management systems that can be required are:

- [BRC](#) (British Retail Consortium)
- [IFS](#) (International Food Standard)
- [FSSC22000](#) (Food Safety System Certification)
- [SQF](#) (Safe Quality Food Programme)

These management systems are additional to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

Tips:

- Check which Food safety management systems are most commonly requested in your target market. Expect GLOBALG.A.P. to be one of them.
- Read more on the different Food Safety Management Systems at the [Standards Map](#).
- As food safety is a major issue; work proactively with buyers to improve food safety and be transparent and up-to-date with buyer requirements and regulations.

6 . What are the requirements for niche markets?

Growing demand for organic avocados

An increasing number of consumers prefer food products that are produced and processed by natural methods. The market for organic avocados is relatively small, but with growing demand and a limited supply.

In order to market organic products in Europe, you have to use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier.

Consider organic as a plus, not as a must, and be prepared to comply with the whole organic process. Remember that implementing organic production and becoming certified can be expensive.

Tips:

- For more details about organic produce as a requirement, see the [CBI buyer requirements for fresh fruit and vegetables](#) and consult the [Standards Map database](#) for information about the different organic certifications.
- Find importers that specialise in organic produce that understand the market and have access to this niche market. Use databases such as [Organic-Bio](#).

7 . What competition do you face on the European avocado market?

For general information about market competitiveness for fresh fruit and vegetables you can have a look at the [CBI's Competition study](#) available at the CBI market intelligence platform. The platform also provides [tips for doing business with European buyers](#).

In this section market entry opportunities and barriers as well as competition on company and product level regarding avocados are listed.

Company competition

Main retails channels are difficult to access

The majority of fresh avocados in the European market are sold through large supermarket chains, even more so in North-western Europe. The buyer power of large supermarkets is very strong and so is the obligation to comply with their strict requirements. The companies that supply these supermarkets are well organised and often have control over an important part of the supply chain, from production to distribution.

The negotiating position of avocado suppliers towards European importers is gradually improving, mainly thanks to the positive market developments. But competing with large experienced suppliers and selling directly to retail clients is a very different game. As a smaller exporter it will be extremely difficult to reach the main market channels for avocados if you are not part of a larger supply combination.

Tip:

- Improve your company's performance by building relationships with experienced buyers and become part of a long term retail programme.

More producers cover increasing demand

The worldwide production of avocados is increasing and competition is fierce. Temporary shortfalls in supply or demand (e.g. through border closures or climate) have a huge impact on prices.

Mexico is by far the largest producer with a [record production](#) of nearly 2 million tonnes in 2017. For Mexico the European market is an alternative to their usual North American focus and their export to Europe has gone up significantly since 2015.

After Mexico there are several countries producing between 0.2 and 0.6 million tonnes of avocados per year (2016 data), among which are the Dominican Republic, Peru, Indonesia, Colombia and Kenya.

Although most avocados in Europe originate in Peru and Chile, other countries such as Colombia are positioning themselves as a new upcoming suppliers thanks to an enormous increase in production, although quality issues sometimes remain a major point of attention.

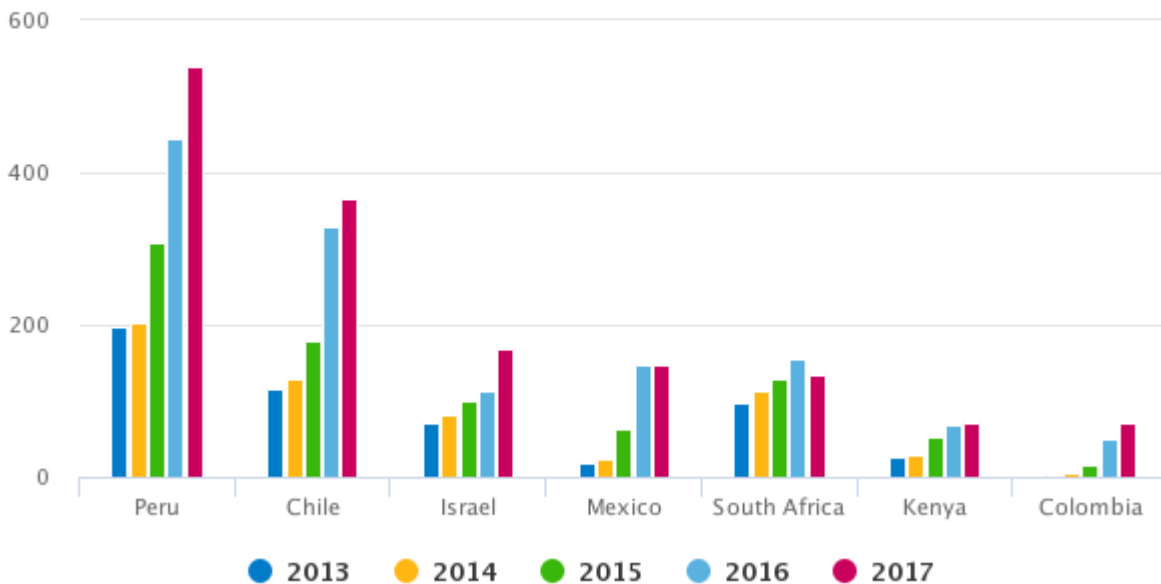
Smaller countries such as Guatemala are expected to become more significant suppliers in the future as well. Here, producers have developed considerable production volumes and started their export to Europe in 2017. Their exports in 2017 were around 700 tonnes destined for the

Netherlands and the United Kingdom, but strong effects will probably take a few more years.

Your competition from other countries is determined by the supply season (see supply calendar in Table 2).

Figure 4: Main suppliers of avocados to Europe

in € million



Source: ITC Trademap

New markets provide a stable growth

With new markets coming up, such as China and India, the expectation is that the worldwide demand will still be growing for a number of years. Worldwide the production is also increasing rapidly but it will take a number of years before saturation will be reached.

Competition between buyers

Professionals in the avocado industry expect shortages in the near future. The avocado plantations worldwide are expanding fast but they take time to reach full capacity and catch up with the demand.

At the same time new consumer markets such as China have stepped into the global avocado trade. Buyers in Europe are concerned that their suppliers will switch to markets with less strict requirements such as Asia and the Middle East.

This competition between buyers can be a blessing for exporters that seek more flexibility in product size and certification.

Tip:

- Find more information about the supply of avocados in Europe on the websites of the [South African Avocado Growers' Association](#) (SAAGA) and [FruiTrop](#).

Table 2: Supply calendar

	J	F	M	A	M	J	J	A	S	O	N	D
Peru												
Chile												
S. Africa												
Israel												
Mexico												
Kenya												
Colombia												
Morocco												
Spain												

Market entry

Certification and fulfilling both legal and non-legal requirements are major obstacles for producers and exporters entering the market.

For avocados, quality during harvest and shipping is crucial and Corporate Social Responsibility (CSR) is becoming increasingly important. Buyers also expect supply chain transparency and information sharing and look for long-term partnerships to ensure product supply and quality.

Tip:

- Establish a credible track record including transparent information on your company and product quality.

Product competition

In the last decade the diversity of fruits and vegetables supplied to the European market has increased; this increases competition from other products. Avocados are a multifunctional fruit that can be used in salads, sandwiches, in spreads and sauces. There are no other products similar to avocados, therefore the risk of replacement is limited.

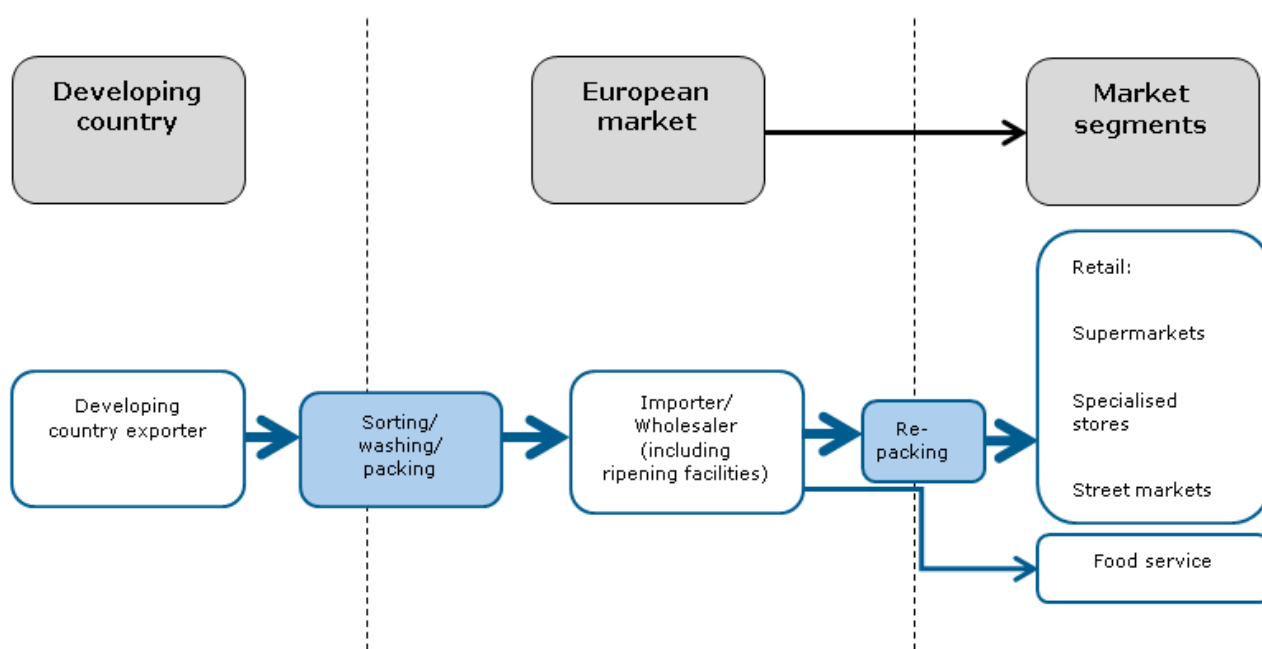
Tips:

- Do not compete on price alone, but build partnerships with buyers/ripening facilities and strive for excellent product quality and handling.
- Use storytelling (e.g. show its origin and producer), novel packaging and premium quality as methods for setting your product apart. Ready-to-eat avocados are increasingly popular, but require excellent logistical processes.

8 . Through what channels can you get avocados onto the European market?

For more general information about market channels and segments, you can have a look at the [Market Channels and Segments](#) section available at the CBI market intelligence platform. This section provides some information about the various marketing channels through which fresh fruit and vegetables are marketed in Europe.

Figure 6: Market channels for Fresh Fruit and Vegetables in the European market



Importers in the Netherlands form an important hub for the rest of Europe

The Netherlands and France are the main entry ports in Europe for avocados. Dutch wholesale exporters deliver avocados to many buyers throughout Europe.

- The Netherlands: Main trade hub for avocados
- France: Large consumption market for imported avocados
- Spain: Main producer of avocados in Europe, but also important processor and importer.

Tip:

- If your focus is the European market as a whole, find your importing partner in a main trade hub for avocados such as the Netherlands.

Avocados are mainly sold by retailers

Avocados are sold mainly in the retail. Large retail stores (so-called hypermarkets) in Spain and France are a dominant market channel. Large retailers and North-Western Europe are premium

markets and generally consume high quality and 'ready-to-eat' avocados. Eastern Europe and Spain (for processing) are able to absorb other avocado qualities as well.

Tip:

- Choose an importer, based on the size of your company or strategy, keeping in mind that importers/distributors differ in their relationship with the retail sector. Some are suppliers for private label products, some have their own brand, while others market the brand of a producer (cooperation).

9 . What are the end-market prices for avocados?

Consumer prices for avocados fluctuate

Consumer prices for avocados fluctuate according to quality, availability and segment. Supermarkets in Western Europe generally sell a good-quality avocado for between 1 and 1.5 euros per unit ('ready-to-eat' Hass quality).

Organic avocados are sold with a premium of 20% or even higher.

Not ripened or lower quality avocados are sold for much less. Also prices on street markets are usually lower than in supermarkets.

When trade prices are rising, the retail market can resort to smaller sizes of avocados and this way maintain a similar price per unit.

Pricing slightly lower in peak season

European avocado prices are slightly lower during the summer months when the product is available from strong suppliers such as Peru and South Africa, whose peak harvest season extends from May to August. Beginning and end of seasons are especially challenging to maintain product quality, which means you have to keep a close eye on the maturity to avoid claims.

Retail prices do not reflect trade prices

Large retail chains or supermarkets often have programmes for avocados with their suppliers. The retail prices and promotions are managed independently from those on the free market (spot). A retail programme provides stability and the security of a steady supply volume, but prices are not negotiable.

Tips:

- For an indication of wholesale prices, find information at wholesale markets such as [Rungis](#). Remember that these prices only provide a limited insight into actual sales prices throughout Europe.
- For consumer prices you can check the online shops or assortments of supermarket chains such as [Tesco](#), [Albert Heijn](#) (search: 'avocado') or [Carrefour](#) (search: 'avocat').

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