

# The European market potential for avocados

Last updated:  
23 January 2023

The supply of avocados is increasing fast, but the European market still has room for growth and can absorb the higher volumes. The healthy nature and multiple uses of avocados result in a strong consumer demand for avocados. Fruit businesses can free-ride on the promotion of avocados, but to join the success in trade your supply must be consistent and of high quality.

## Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for avocados?](#)
3. [Which European countries offer most opportunities for avocados?](#)
4. [Which trends offer opportunities on the European avocado market?](#)

## 1. Product description

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

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.

Harmonized System (HS) code	08044000 Avocados, fresh or dried
Commercial varieties	<ul style="list-style-type: none"><li>• Hass (Guatemalan)</li><li>• Fuerte (hybrid)</li><li>• Ettinger (hybrid)</li><li>• Pinkerton (hybrid)</li></ul>
Minor commercial varieties	<ul style="list-style-type: none"><li>• Tropical avocado (Dominican Republic)</li><li>• Reed (Guatemalan)</li><li>• Ryan (Mexican/Guatemalan)</li><li>• Zutano (Mexican)</li></ul>

Figure 1: Examples of avocado varieties



Top: Benik, Hass, Nabal. Bottom: Ettinger, Fuerte, Pinkerton Source: [OECD \(2004\), Avocados, International Standards for Fruit and Vegetables, OECD Publishing, Paris](#)

## 2. What makes Europe an interesting market for avocados?

The European demand for avocados continues to grow. Higher volumes in the market will continue to drive up consumption, but production and supply volumes make the avocado market unpredictable.

### **Avocado will be the second best-selling tropical fruit in the world in 2030**

According to the [Agricultural Outlook 2021-2030](#) report from the Organization for Economic Cooperation and Development (OECD) and the Food and Agriculture Organization of the United Nations (FAO), avocado is expected to become the second-most traded major tropical fruit by 2030, after bananas. It will overtake the export volume of both pineapples and mangoes. In Europe, avocados have already become the second most valuable imported fruit from developing countries, overtaking grapes. A growing global demand and major investments in production are at the base of this expansion.

Although avocado has the lowest production among the major tropical fruits, the growth outperforms the other fruits. The global production volume is expected to reach 12 million tonnes by 2030, three times more than a decade ago. In Mexico, the world's largest avocado producer, there was a decrease in volume in 2020. But in the long-term Mexican supplies may increase by 5.2% on an annual basis to fulfil the growing demand in the United States. Countries such as Peru, Colombia and Kenya continued their growth with double digits, with most of their exports being destined for the European market.

The United States and Europe are expected to remain the largest importers. According to OECD/FAO these regions will be responsible for 40% and 31% of global imports in 2030 despite the growing trade with other regions such as China and the Middle East. For growers and exporters it will be important to focus on specific regions where demand has room to grow, but also to diversify their markets, anticipating on markets becoming less concentrated.

### **Europe can absorb growing volumes of avocados**

Avocado has been the most dynamic fruit in the past years. There has been an almost insatiable demand and an unbalanced supply. In recent years, oversupply has occurred more frequently. But Europe proves that it can still absorb more avocados.

After a peak in volumes in 2018, the leading suppliers, Peru and South Africa, both saw their export potential decline in 2019 and as a result the overall price was higher. In 2020, the COVID-19 pandemic broke out, which initially led to a sudden increase in demand. This demand was mainly fulfilled by retailers since restaurants were closed due to the lockdowns. The European import volumes continued to grow, but the increasing production volumes did not benefit prices. All together imports grew to a volume of over 800,000 tonnes in 2021 and a value of almost 1.8 billion euros (see figure 2). In 2022, traders saw a similar development as in 2018 with excessive volumes from Peru.

The advantage of avocados is that they are programmed (contractually planned) by retailers. Their promotions can help sell additional volume. This way a much larger volume can be pushed into the market for lower prices and boost consumption. This is what happened in 2018 and again in 2022, but with a much lower profit in return. Despite the strong demand for avocados, there is a limit to Europe's ability to keep up with the speed in which avocados are being cultivated for export across the world.

Supply volumes have a major influence in stimulating European imports. In the next years you will see import volumes increase further. At the same time, you can expect new price drops when there is too much supply. These drops will be noticeable especially during the Peruvian season, but other suppliers from Colombia, Mexico and Kenya are also reaching volumes that can over-supply the market later in the year. New markets, in and outside Europe, will be necessary to make a growing supply sustainable. In the long term (>3 years), avocados will become a standard product for retailers in most European countries. You will see higher volumes throughout Europe, but also with a slower growth rate.

## Tips:

Combine your export to Europe with the development of new markets outside Europe (and the USA), for example in Asia and the Middle East. Diversification will help you spread trade risks and make you less dependent on one region. Make sure you have access to new target markets by checking if your country has a phytosanitary agreement with that country – contact your local food safety authority.

Make sure to offer a sufficient volume with at least weekly full-container shipments. Importers favour larger producers to guarantee supply certainty. However, do not prioritise quantity over quality. In the end, wholesalers and retailers demand good quality products and trustworthy suppliers.

Figure 2: European import (EU-27+UK+EFTA) of avocados with non-European origin



Source: Eurostat / Access2Markets (EU-27) & ITC Trade Map (UK)

## Still room for growth in consumption

Avocados are appreciated because it is a unique and healthy product (oleaginous or oil containing fruit) with many culinary applications. But compared to other high-demand regions, European consumption is still underdeveloped.

The differences in consumption within Europe and the gap with other developed consumer countries such as the United States and Canada show that there is much potential for growth. In 2020/21 the average consumption in Europe was approximately 1.4 kg per capita. In the United States this is nearing 4 kg and in Canada almost 3 kg. Mexico, the world's largest avocado producer, even consumes 6.5-7 kg per capita. According to [Cirad's FruiTrop Magazine](#) the consumption of avocados in Europe has grown by 17% from 2019/20 to 2020/21. Scandinavia and France have particularly high consumption rates per capita. The recent growth is most notable in countries where consumption is still relatively low such as Germany, Italy and Eastern Europe. In the next few years more European markets will reach a higher level of maturity.

## Tip:

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

## 3. Which European countries offer most opportunities for avocados?

France is the leading end markets for avocados, while Scandinavian countries have the highest consumption per capita. Although the growth in some of these leading consuming countries is slowing down, Germany, Italy and Eastern European countries still have lots of potential in the coming years. Many of these countries are either supplied by traders in the Netherlands. Spain, Europe's largest-avocado producing country, is also fulfilling more and more a role of international distributor.

Table 1: Estimated avocado consumption and growth in Europe in 2021

	Consumption in tonnes	Population	Consumption per capita	Growth 2015/16 - 2020/21	Growth 2016/17 - 2021/22	Growth 2019/20 - 2020/21	Growth 2020/21 - 2021/22
France	148965	64.5	2.31	41%	31%	11%	8%
Spain*	113617	47.5	2.39	203%	189%	27%	8%
United Kingdom	107662	67.3	1.60	29%	10%	1%	0%
Germany	104714	83.4	1.26	156%	107%	15%	3%
Netherlands*	49953	17.5	2.85	-2%		70%	
Italy	39710	59.2	0.67	179%	201%	39%	37%
Poland	20789	38.3	0.54	161%	94%	23%	14%
Sweden	18962	10.5	1.81	19%	-1%	4%	-2%
Switzerland	18915	8.7	2.17	19%	45%	4%	17%
Denmark	15631	5.9	2.65	18%	25%	-1%	9%
Norway	15494	5.4	2.87	26%	23%	12%	-3%
Belgium	13043	116	1.12	133%		78%	
Finland	7570	5.5	1.38	6%	-15%	3%	-12%

Calculated consumption based on import, export and production statistics, sources: UNComtrade, Eurostat, and compared with data of [Cirad / FruiTrop](#). \*Netherlands & Spain: not reliable due to transit/production and partly based on data Cirad / FruiTrop

## The Netherlands: Your main trade hub for avocados

The Netherlands is the main trade hub for avocados in Europe. You will find several major avocado importers in the Netherlands. Here avocados are ripened and distributed to many European destinations.

The Netherlands is responsible for more than half of Europe's avocado imports. The country is also the largest non-producing exporter of avocados in the world. Large volumes are re-exported to Germany, France and Scandinavian countries. And there are growing exports to Spain, Poland and many others. Dutch traders have become specialists in avocado ripening, packing and logistics. They are also used to working with different sustainability requirements of retail chains in Europe.

Because of the leading role in avocado trade, the Dutch market is familiar with avocados and has a large consumer market. With a relatively small population of 17.5 million people it is among the top consumption countries in Europe. Dutch retailers offer a variety of avocados from pre-packaged, ready-to-eat avocados to small-size avocados in a net for home ripening (see figure 5 and 6 as examples).

The Netherlands will remain a main trade hub for avocados. Over time its function may become more logistical

and less commercial as other avocado specialists emerge throughout Europe.

### Tips:

Meet with potential buyers by presenting yourself at international fairs like [Fruit Logistica](#) or [Fruit Attraction](#). You can also connect with companies through [Fruit Logistica's digital industry platform](#).

Consider using the established trade routes and find an importing partner in the Netherlands, since the Netherlands has become the most dominant transit country for avocados for the European market.

Find Dutch importers on the [member list of the Fresh Produce Centre](#). Please also see our study on [Exporting fresh fruit and vegetables to the Netherlands](#).

## France: Your largest destination for avocados

France is a leading market for avocados in Europe with a focus on high-quality avocados. Potentially you can find decent margins when you can fit your product into the major retail chains.

France imported 182,000 tonnes of avocados in 2020, and more than 60% came directly from developing countries. With a calculated local demand of 149,000 tonnes, France is the largest destination for avocados in Europe. Consumption growth has been slower than in several other European markets (see Table 1). This can be attributed to the fact that France is a more mature market with an annual consumption of well over 2 kg per capita. Regular price increases also slow down the growth in avocado consumption. Despite the higher prices, organic avocados are taking an increasing share of the market.

In supplying the French market Peru has overtaken Spain again, with 51,000 tonnes versus 38,000 tonnes. Israel, Mexico and Kenya complete the top five. A local or regional product (from Spain) is highly preferred, but there is a year-round demand. Spain and Israel are not necessarily the most economic sources for avocados. Price is less of an issue for a number of buyers that focus on quality and local products, including organic.

### Tips:

Find buyers that supply larger retailers in France and be prepared to commit to extra quality requirements. Prices and margins are likely to be better on average when working with retail contracts compared to the traditional wholesale markets.

Check organic and conventional avocado prices in French import, wholesale and retail on the Market News Network of [FranceAgriMer](#) (search for "avocat" in French).

## Germany: Provides most growth perspective

Germany is in full development. Promotion of health benefits and discount offers are important drivers for a rising avocado market. This makes it an interesting country for exporters.

Germany is one of the bigger countries with the most growth perspective besides Italy. Germany has the largest population in Europe and is still developing its avocado market. Currently, the consumption is just over 1.2 kg per capita and rising. Avocados are praised because of their health benefits and the German consumption is expected to catch up with other northwest-European markets.

Favourable consumer prices and the additional attention for healthy eating during the COVID-19 pandemic contributed to a strong growth in 2020. Supermarkets more than compensated for the loss in wholesale. Ongoing high freight rates made avocados slightly more difficult to sell in 2021. Total imports stabilised at a little over 120,000 tonnes. The supply from developing countries remained strong and reached 77,000 tonnes, and came mainly from Peru, Mexico and Colombia.

Germany is the home country of discount retailers such as Lidl and Aldi, which often take the lead in offering promotions in avocados. At the same time a retailer like Lidl is known to be one of the strictest when it comes to pesticide residues. This can be a barrier for avocado exporters. The aversion to pesticides is also notable in the highest sales revenue for organic food in Europe, making Germany an interesting market to explore for organic avocados.

### Tips:

Maintain Lidl standards for supplying the German market, which is known as being one of the strictest. This means the pesticide residue level of your avocados must be a third of the European allowed limits.

Focus on the facts when presenting your product such as the results of a laboratory analysis or your registration of used chemicals. German purchasers are not very sensitive to emotional sales arguments.

Read about all the specifics of the German market in CBI's market information on [Exporting fresh fruit and vegetables to Germany](#).

## United Kingdom: Important consumer but with increasing economic pressure

The United Kingdom is among the largest markets for avocados, but with high standards and increasing price pressure. As a supplier you must be competitive and well organised at the same time.

Like in France, consumption in the United Kingdom increased fast until 2016. Rising costs and prices due to Brexit (the United Kingdom leaving the European Union) and COVID-19 have tempered recent fruit sales. The sustainability of avocado orchards, or lack thereof due to their intensive water use, have also had an effect on some avocado enthusiasts. Nevertheless, the consumption of avocados will continue to increase and a growing interest in plant-based diets will keep up the demand.

The United Kingdom imported 114,000 tonnes of avocados in 2021. This was slightly less than in the previous year. In spite of that, import from developing countries such as Peru and Colombia continued to grow. Direct import replaced some of the former supplies via the Netherlands and Spain.

Avocado companies consider the United Kingdom to be one of the main markets. Investments and product branding confirms this. California-based Mission Produce has announced [plans to open a state-of-the-art ripening, packaging and forward distribution centre](#) in the UK in 2023. Westfalia Fruit introduced the 'gourmet' GEM avocado through the British main retailer.

The United Kingdom is an interesting market to supply directly from developing countries. But there is little room for informality or mistakes. In this developed market you can expect continuing pressure on prices, while the quality and certification standards remain one of the highest.

## Tips:

Be flexible with your volume and prices to remain active in the United Kingdom. There are trade shifts due to increased administrative burden of EU import. This may provide more opportunities for non-EU suppliers, especially when you are in a similar supply season as Spain – the main European producer of avocados.

Find more opportunities for market entry in CBI's report on [Exporting fresh fruit and vegetables to the United Kingdom](#).

## Spain: Complements production with import

Spain is a producer, consumer and also an emerging trade hub for avocados. For an exporter Spain is an interesting target country, because it is likely you will find a broader market than just Spain itself.

Spain is the main producer of avocados in Europe with over 116,000 tonnes in 2021 according to Eurostat. On top of that the country imported 214,000 tonnes. More than 80% was sourced in developing countries such as Peru and Mexico. There is also an increase in imports from Morocco (17,500 tonnes in 2021) which overlap with the Spanish season.

Production and trade statistics are not fully aligned. For that reason, the consumption rate in Spain is difficult to estimate. Either way, Spanish traders also purchase more and more avocados from abroad to complement their own production season and comply with international supply contracts. This makes Spain Europe's second-largest exporter of avocados after the Netherlands. In the years to come you can expect Spain to become a larger consumer of avocados, but more importantly, it will also play a bigger role in the European avocado supply.

Most of the avocados traded from Spain have France as their destination (54,000 tonnes), followed by the Netherlands and Germany (20,000 and 15,000 tonnes respectively).

## Tips:

Use Spanish avocado importers and traders mainly to strengthen your position in France and southern Europe. [Visit the Fruit Attraction trade fair](#) to get in contact with Spanish avocado companies.

See how Spain is developing its trade in the reports on [Exporting fresh fruit and vegetables to Spain](#).

## Italy: An emerging country for avocados

Italy is still emerging as an avocado country. The potential of its large population and underdeveloped consumption should be a reason for exporters to maintain a focus on Italy.

The avocado consumption in Italy is very small in comparison with the population size (less than 700g per capita) and far behind the Western European average. In Italy consumers hold on to traditional fruit and vegetables. 'New products' such as avocados take time to be introduced. Green skins and smaller sizes (12-14) are popular, but people are getting more used to the Hass variety as well.

Despite the traditional consumers, Italian traders are optimistic about avocados, and with reason. The import volume was nearly 42,000 tonnes in 2021, a 50% increase compared to the previous year. Most of the import is

realised through the Netherlands, France and Spain. The consumption has doubled in five years' time.

Although Italy is currently not among the top five import countries in Europe, the potential of its avocado market must be counted among the ones with the highest potential.

### Tip:

Take advantage of the potential growth of avocados in Italy and start building relations with importers. Italian companies are normally most focused on their internal market. So to meet them you must go there. A popular gathering place for Italian fruit companies is the [Macfrut trade fair](#) in Rimini.

## 4. Which trends offer opportunities on the European avocado market?

Avocado consumption is boosted by its reputation as a healthy fruit, product promotion and the innovation in ready-to-eat avocados. Due to the increased attention, sustainability has become an important factor in the avocado trade.

### Ready-to-eat fuels consumption

The consumption of avocados has been supported by developments such as 'ready to eat'. Ripening helps provide convenience and quality at the same time. Consumers are prepared to pay a premium price for high-quality 'ready to eat' avocados. It is a safe and an easy choice.

The 'ready to eat' trend is particularly strong in the United Kingdom and the Netherlands, but many countries in Europe are following. It will continue to develop further and help boost the consumption.

Companies offer fruit ripening as a service or large fruit suppliers implement their own ripening facilities. Examples of specialist ripeners are [Nature's Pride](#) and [LBP](#) (service provider) in the Netherlands, and [Ripenow](#) and [The Avocado Company](#) (Fresca Group) in the United Kingdom.

Ripening facilities will grow larger and more professional. More and more large companies invest in European-based facilities with the latest technologies. New non-destructive technologies to test the quality of avocados, will contribute to an optimum fruit quality for ready-to-eat avocados. These technologies include inventions such as [Avos, by the company Experience Fruit Quality](#), and fully automated [avocado sorting machines](#).

As an exporter you can best capitalise on this trend by focusing on importers with ripening facilities and supply avocados with an acceptable dry matter content. In doing so, you should always be aware of supplying the right uniform quality.

Figure 5: Example of a ready-to-eat avocado



Source: Photo by [smias](#) per Open Food Facts

### Tip:

Always check the fruit maturity and dry matter before shipping. Supply avocados with a minimum dry



matter content of 22-23%, especially when destined for ripening. You can find more information on buyer requirements for avocados in the CBI study '[Entering the European market for avocados](#)'.

## Sustainability has become a precondition

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. To stay in business you must work on a sustainable and responsible production.

There are increasing concerns about water resources, deforestation and supply chain transparency in avocado production. These concerns touch Peru, Chile, Mexico and Brazil, among others. Because avocados are a popular fruit in health food media, negative attention resonates in the public sphere. Although it has had little impact on general consumption so far, it can influence the sourcing preferences and the pressure on certifications. Marketers of avocados will have to prove to consumers that their products are produced sustainably – this is a tendency that will only become stronger in the long run.

Avocado exporters have taken steps to improve their sustainability. Companies such as [the Chilean Subsole](#) have implemented several projects to confront different environmental issues, including the management of water, soil, energy and waste. As an exporter you must be able to prove your good practices and convince importers and retailers in Europe.

A large number of retailers and importers are committing to social standards such as Sedex Members Ethical Trade Audit ([SMETA](#)), or initiatives such as the Sustainability Initiative Fruit and Vegetables ([SIFAV](#)). For example, together with SIFAV, the company Eosta has increased the transparency in Kenya in [Living wages in practice](#). Social and environmental standards and certifications such as GlobalGAP, GRASP, SMETA and BSCI have become a precondition for the import of fresh tropical fruit such as avocado. Some European retailers are upgrading their standards to meet the more stringent requirements of certifications such as [Rainforest Alliance](#).

### Tips:

Promote sustainable agriculture and proactively show your actions to reduce water usage. Pay extra attention to this in water-scarce regions.

Get certified and implement standards. See the [SIFAV Basket of Standards](#) for relevant social and environmental standards, but also try to think creatively and undertake activities to guarantee a sustainable production and sustainable water use.

## Attention to the health factor of avocados

Avocado has gained a good reputation for its health benefits. In the future you will continue to see avocado grow as a healthy product. You can also profit from the increasing demand for organic-certified avocados.

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. It also serves specific consumer groups that prefer a plant-based diet, such as vegans, vegetarians and flexitarians. All these aspects are used in the promotion of avocados and contribute to the increasing consumption throughout Europe. Health is also the reason that the COVID-19 pandemic gave a positive impulse to the consumption of avocados.

Thanks to the increased attention to health and the environment, the interest in organically produced avocados is growing. The current supply does not fully satisfy market demand due to the difficulty of producing organic avocados. Organic avocados can be an opportunity for growers that are able to produce according to the strict European guidelines for organic production. You can expect a premium price for organic avocados – however, when avocado prices become too high, consumers stop purchasing organic or fall back on conventional supply.

### Tip:

Familiarise yourself with the [organic guidelines](#) and [organic farming in Europe](#) before getting into the organic trade.

## Promotion, innovation and branding improve consumer experience

The promotion of avocados has reached extreme levels. It explains why avocados followed a strong upward trend, but it is also a reason to be cautious as food hypes never last forever. As a supplier you can best add to the promotional strength of avocados by providing a positive background story about the origin and the growers of your product.

Figure 6: Example of Italian branding of ‘creamy, organic avocado with soft pulp’



Image by [ICI Business](#)

Branding and promoting can contribute to consumers’ experience and quality perception. Avocados have great promotional value and are unique in the fresh sector for their level of innovation. Avocado suppliers create ready-to-eat or organic avocado brands in an attempt to link their brand to quality. Retailers try to steal the show with all kinds of variations:

- [Avocados for home ripening](#) in Tesco supermarket
- Fresh [guacamole kits](#), for example in Dutch retailer Albert Heijn
- From [supersized](#) to [egg-sized avocados](#), and the special [Gem variety](#) in Tesco
- [Seedless avocados](#) in Marks & Spencer
- Ecologically labelled avocados through [laser technology](#) in Marks & Spencer and the Swedish ICA Supermarket

The Western obsession with avocados has become so strong there are nowadays even restaurants dedicated to avocados as a main ingredient: the restaurant [The Avocado Show](#) that has grown into a European franchise chain, and the [Avobar](#) that launched in London.

### Tips:


Create and communicate the story of your product (what promise does it deliver?) and be consistent with your supply. Avocados benefit from their promotion, but your contribution as a foreign supplier is limited and your actions must be targeted at your buyer.

See the [CBI Trends in fresh fruit and vegetables](#) for more information on trending topics.


This study has been carried out on behalf of CBI by [ICI Business](#).

Please review our [market information disclaimer](#).

Follow us for the latest updates

(opens in a new tab)  Twitter

(opens in a new tab)  Facebook

(opens in a new tab)  LinkedIn



[RSS](#)