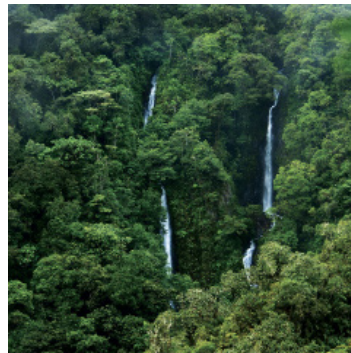


Marketing and commercial stream



■ The market avocado in Europe and France

G. Burunat¹

¹. Presidente de Commercial Fruits S.A – Francia

There is an enormous potential market for avocados in Europe. We have 520.4 millions of consumers and the market is highly competitive with many different origins and varieties available. A new trend has been developing in the consumption of avocados. Chile and Peru are, the two origins, that have participate the most to the European growth market during these last 10 years.

Europe is a market with a cultural diversity of languages, consumption habits, taste and purchasing power. Consumption per capita varies from country to country. The main consumers are France and the Scandinavian countries with Denmark in the first place. Nonetheless, it remains countries such as Italy, Germany and Eastern markets that need to be developed.

Everywhere, growth has begun since supermarkets decided to sell ripped avocados This market diversity is actually an advantage because it gives us the opportunity to have complementary countries in terms of sizes and Hass varieties. Larger sizes go to southern markets, small sizes to the north and the green variety to new consumers with less purchasing power.

When it comes to France, the preference goes to the Hass variety (85% of the market). New markets always start consuming the green skin variety and once consumption increases they start moving toward Hass. We are witnessing as a result, a growing interest towards the medium sizes and mainly size 18.

The main aspects in which we should concentrate our efforts and focus for the future are the quality, the use of packaging (generic), the fat dry matter, certifications and marketing campaigns.

Finally, the importance of the European market keeps growing every year, consumption in terms of volumes is increasing without affecting prices. It is interesting to see that we cannot relate a price to a volume. The two main reasons that can affect prices are the increasing number of agents in origin and in destination, as well as the arrival into the market of a size or a quality that is not in demand.

With regard to the number of hectares that has been planted, Peruvian production is expected to continue growing strongly. That is why, it is important to avoid saturating the market or increasing products in the same market

A further point must be mentioned here, the average importer selling price in Europe has been increased for the last seasons. We are, therefore, optimistic about the future. In conclusion, there is still a growth potential market in Europe, since the market absorbs more and more volume with better prices.

■ The U.S. avocado market

G. Cavaletto

V.P., Sourcing

Index Fresh, Inc.

Riverside, California, USA

The United States is the world's largest market for fresh avocados. The industry there was pioneered in the early 20th century by a handful of growers learning to grow a new and exciting product. Several important trends have helped this industry evolve to into the 2 billion pound market that it is today. Interest in avocados continues to grow, as consumers there become increasingly familiar with avocados. This presentation explores the evolution of the avocado from a specialty product supplied by domestic farmers producing dozens of varieties to the 'Hass' dominated global industry that it is today. It describes the impact that imported avocados have had on the U.S. market and how that impact is expected to change in the near future. Special attention will be given to the latest developments that have driven avocado sales from obscure to essential in produce departments and on menus across the country.

■ United States avocado market profile

E. Escobedo¹

¹. Hass Avocado Board, California, EE.UU.

Hass Avocado consumption in the United States has increase 130% in the last ten years becoming now the largest consumption market in the world. Using information from various sources accumulated by the Hass Avocado Board, the presentation will cover the profile of the US consumer, retail sales dynamics and supply trends during the seasons of the year.

■ **Positining the health benefits of avocaods in the U.S. Market**

E. Escobedo¹

¹. Hass Avocado Board, California, EE.UU.

The Hass Avocado Board has invested millions of dollars in human nutrition research in the last five years. To communicate the science and motivate consumers to eat more, the Hass Avocado Board developed a marketing and communications strategy that brings the industry together under a single nutrition message that is simple and motivating for the consumer by combining the pleasure of eating avocados with the nutritional benefits.

■ **Cost-benefit analysis of area-wide management of laurel wilt disease in Florida commercial avocado production area**

E. A. Evans¹, J. H. Crane¹, R. C. Ploetz¹, F. H. Ballen¹

¹. University of Florida, IFAS, Tropical Research and Education Center, Homestead, FL, USA.

Laurel wilt (LW), caused by *Raffaelea lauricola*, is an invasive, lethal disease of members of the Lauraceae plant family in the southeastern United States. Since 2003, it has killed millions of native forest trees and has impacted commercial avocado production in South Florida. Given the destructive nature of this disease, there are major concerns over the future of the Florida avocado industry, which provides an annual economic impact of nearly \$100 million. Cost-effective management of LW remains an elusive goal. In 2012, an area-wide management program centered on early detection and destruction of affected trees, funded largely through a combination of industry, state, and federal sources, was implemented with the aim of preventing or drastically slowing the spread of the disease in the commercial avocado production areas. However, given that the disease is now endemic within the production area, some of the stakeholders have begun questioning the wisdom of maintaining the program. Given these developments, this study assesses the potential net benefit of the area-wide management programs. The results of the analysis indicate that the benefits of the program far exceed the costs, suggesting that while not ideal, the program has played a significant role in minimizing the rate of spread, thus providing time for scientists working around the clock to continue their effort towards developing a cost-effective treatment.

■ **Knowledge dissemination strategy for the Hass avocado chain in Antioquia, Colombia**

D. H. Gómez Franco¹, G. L. López Flórez²

¹. Terravocado, Medellín, Antioquia

². Universidad Pontificia Bolivariana, Medellín, Antioquia

The paper presents the construction of a strategy to disseminate knowledge to the Hass avocado productive chain in Antioquia; it serves as a precedent for replicate to other varieties of avocado and other departments in Colombia. This was done by three phases:

- 1) **Phase I:** consensus development of the perception of the most important actors in the production chain avocado in Colombia about the organization of it, the structure of the cluster in the department, and the status of claimant and / or knowledge generators of each actor.
- 2) **Phase II:** selection of relevant and priority thematic of knowledge dissemination through the Delphi methodology, involving more than 200 experts.
- 3) **Phase III:** pilots of knowledge dissemination, It was made an analysis of the importance of including Information and Communication Technologies, It is proposed a knowledge disseminating strategy and finally It is presented the results and lessons learned from the diffusion rounds that were made over 150 avocado growers.

■ Establishing an avocado industry in Mozambique: an answer to poverty alleviation?

H. Blight¹

¹. Amorentia Estate y Vivero, Mozambique

The Mozambique Midlands above 500m in altitude, running along the eastern side of the Chimanimani Mountain are a frost free area ranging from 21°S to 10°S. Summer rains range from 800mm to 1500mm per annum resulting in perennial stream and river flows. This area of Mozambique has, over the past 5 years, proved to be most ideally suited to the production of avocado. By the end of 2015, 350ha of avocados of various cultivars will have been planted and orchards thus far show promising results with excellent and fruit quality. A large commercial avocado nursery producing trees on West-Indian rootstocks has been established in the Manica Province.

The rebuilding of the country's infrastructure, together with a stable political environment, continues to encourage the appropriate business confidence. South African farmers, as well as investors from certain European countries are entering the Agribusiness arena in Mozambique, with particular attention been given to the subtropical fruit and nut basket which is headed-up by macadamias, litchis and avocados.

Tarred roads and main-line electrical installations are being upgraded. The country has a good, structured banking system. Land acquisition is achieved through the DUAT system. This is a 50 year deed of lease of land from the state with an option for renewal, and is protected by law and land cannot be confiscated by the state once improvements have been brought about on the land. Government and Provincial authorities are actively encouraging new investments into the Agribusiness sector.

The first large commercial avocado packhouse for the export market is currently built near the central city of Chimoio. In most cases the costs associated with acquiring land on which to plant avocados in Mozambique is a quarter of the price being asked for land in South Africa.

■ Developing new avocado plant material: overview of the plant breeders rights/patent concept, time-frames in testing, internationalisation and commercialisation

J.S. Köhne¹; T. Bekker¹; Z. van Rooyen¹; S. Kremer-Köhne²; R.C. Brokaw³; C. Fernandez³

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². Independent consultant, Haenertsburg, South Africa

³. Brokaw Nursery, California, United States of America

The development and testing of avocado plant material deemed to hold commercial potential requires thorough testing and evaluation, before a commercial release is justified. Westfalia Technological Services (WTS) in South Africa has developed expertise in this field, together with partners in several avocado growing countries. Further, as plant material owners often require their new plant material to be protected by Plant Breeders Rights (PBR) or, in the case of the USA, by patent, the process and implications of this aspect will be explained. In addition, the introduction of plant material from one country to another one requires diligent compliance with phytosanitary regulations. Time-frames and lessons learnt involved in the testing, internationalisation and commercialisation of avocado plant material will be discussed.

■ Prospects in Colombia Hass avocado

A.E. Mejia Hernandez

Presidente, CorpoHass

The avocado industry in Colombia has been providing a very important growth dynamics; According to DANE this product was one of the fastest growing fruit areas in the last decade and is now the third fruit in importance within the national agricultural sector. Keep in mind that the avocado in Colombia comprises a diversity of varieties according to climatic conditions and living areas of production. Avocado in Colombia can be planted from sea level to 2500 meters above sea level.

In the last five years Colombia has shown an exceptional increase in export figures avocado, from 20 tons in the 2008-2009 season to 3800 tons in the 2014-2015 season that is going from 1 container to 187 (an increase of 18,600 %).

Finally, it is important to note the recent establishment of the National Organisation of Producers and Exporters of Avocado Hass Colombia - CORPOHASS, which will have the task of representation and national dialogue on the future process of Hass avocado exporter to the US and work for the progress and welfare avocado growers in Colombia. The focus of this organization will be based on compliance with international standards and positioning of Colombia as a reliable source of Hass avocado worldwide.

■ **China: the new frontier**

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Mission Produce, Inc., Oxnard, California

As China continues to modernize, unprecedented changes are taking place. The country's population has grown to over 1.5 billion people, and large metropolitan areas have up to between 12 and 45 million inhabitants. In the year 2000 the middle class in China accounted for about 4% of the population, and today it has risen to nearly 66%. As the middle class grows, more wealth affects spending on food, dietary options, and an increased focus on health and nutrition. These factors have driven a tremendous change in avocado consumption throughout China.

■ **The rise in fame of the amazing New Zealand avocado**

M. Munro¹

¹ New Zealand Avocado Growers' Association, Tauranga, New Zealand

The New Zealand avocado industry is on a path to triple production and quadruple sales of its Hass avocados. This is very positive for New Zealand's export industry as we develop new markets but also means an increase of fruit on the fragile New Zealand market.

To maintain a profitable industry, NZ Avocado has recognised the need for a unified marketing strategy and investment in promotions for both export markets and the domestic market. A category story for New Zealand avocados has been developed with industry and implemented in 2014. The key goal of this initiative is to increase consumption in New Zealand at value and to increase overseas customers' awareness of the benefits of New Zealand grown avocados and to position avocados from New Zealand as a premium choice.

This process has also had the spillover benefit of fostering greater collaboration between industry and the governing body to develop promotional strategies. This presentation:

- Explores the NZ Avocado promotions programme
- Details the process to develop a category story

■ **State - enterprise - university: successful relationship around the Hass avocado in Antioquia - Colombia**

J. C. Ruiz¹

¹ Ex Director Ejecutivo CORPOAGUACATE. Medellín. Antioquia. Colombia

The global demand for Hass Avocado is an opportunity for Colombia to compete in that market. In Antioquia, Hass avocado cultivation, with 3,000 hectares today, projects with 10,000 hectares for 2020.

This growth must be accompanied by strategies to ensure: export quality, appropriate phytosanitary management, vegetable material with genetic and sanitary quality, crop establishment in suitable areas, farms certification, qualification of labor, consumer promotion, planting new areas.

For these reasons has been made a project called: "Technology, productive and comercial development of Hass Avocado in Antioquia - Colombia", built in collaboration with members of avocado chain, articulated the development of government projects supported by the funds Compensation and Rural Development, royalties system, to be achieved at the end of it, an average yield of 12,000 kg / hectares.

■ Avocado symbol of youth, beauty and health

L. S. López

With this thesis, I intend to cover the nutritional properties of avocado, focusing on the cosmetology and pharmaceutical industry. The lack of concience and knowledge regarding the benefits of avocado, directed to the health, nutritional, pharmaceutical and cosmetological industry, has led me to the challenge of completing the overall cluster of avocado. The overall production of avocado in México has led to a field where there is little knowledge, which has been barely exploited, fact that allows us to visualize the industry in all facets.

In the exciting organical current of the actual world, which is growing, the avocado covers the demand for the health, nutritional, pharmaceutical and cosmetologic industry. It is 100% usable material. The benefits of avocado oil have displaced other vegetables oils including olive oil. Thanks to the increasing production of avocado in diferent regions within the country of Mexico, such as Michoacán (major world producer) It has been possible to cover the demand of the avocado industry without increasing the cost of raw materials, creating a space to exploit, enabling the clients easy access to the final product.

I pretend to emphasize on the growth that the yearly demand of avocado has in the world market especially regarding personal aesthetic and alternative fields on which I will focus and look for different distribution channels.

■ New Zealand avocados go global

J. Scoular¹

¹. New Zealand Avocado Growers' Association, Tauranga, New Zealand

New Zealand Avocado has set a vision to triple volume and quadruple value by 2023 through the industry strategy “New Zealand Avocados Go Global”. This strategy aims to transform New Zealand’s avocado industry from a reliance on one market to a globally competitive, high value, sustainable export industry, with a dynamic market in New Zealand.

The priority for increasing value is to drive returns for export fruit, ensuring premium fruit is delivered efficiently throughout the supply chain. Meeting customer needs remains a priority and with additional volumes available new markets need to be developed. Maximising returns for non-export grade fruit also needs innovative options.

To implement the Go Global strategy, New Zealand Avocado is utilising resource and capability from across the sector to drive change and lead the industry towards a common goal, encouraging both competition and collaboration. This presentation discusses the strategy set to address some of the issues of the New Zealand avocado industry and the solutions being implemented, both on-orchard and strategically.

■ An overview of Westfalia technological services’ research - roots, shoots and fruit

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The South African avocado industry is strongly export driven. Westfalia Fruit Estates (Pty) Ltd is one of the largest avocado producers in Southern Africa and Westfalia Marketing SA (Pty) Ltd is responsible for just under half of South Africa’s total avocado exports. Part of the Hans Merensky Holdings Group, Westfalia Fruit is a vertically-integrated organization with a growing international footprint.

The research conducted at Westfalia Technological Services (WTS) covers most aspects of avocado production – from the cultivation of nursery trees to ensuring that avocado lovers around the world are served perfectly ripe and attractive fruit. The WTS team comprises horticulturalists, plant pathologists, fruit physiologists and food technologists. Research is aimed at solving both short- and long-term challenges, with our rootstock selection programme running for over 30 years and producing the highly-successful Merensky 2 (Dusa®) rootstock.

With ever-increasing competition in the international avocado market, producers and suppliers need to remain at the forefront of technological advancements while satisfying consumer preferences. Such requirements were foreseen by the organization’s founder, Dr Hans Merensky, whose pioneering strategies can now be shared with future generations across the globe. This paper shares some of these strategies with you.

■ Avocado industry in the highlands/sierra of Peru: creating value in the Andes

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².Responsable del Programa Nacional de Innovación e Industria de la Palta Hass y otros Frutales, Sierra Exportadora. Ministerio de Agricultura y Riego

Sierra Exportadora is an executor under the Ministry of Agriculture and Irrigation which seeks to promote and develop exportable quality to articulate the Peruvian highlands to national and international markets, promoting entrepreneurship and innovation of production processes to turn the Andes area in a competitive region. In the case of avocado, the National Programme of Innovation and Industry of the Hass avocado and other fruits is developing projects in three corridors: South-South Corridor with Arequipa and Moquegua; South corridor, Huancavelica, Ayacucho, Apurimac and Cusco and the Northern Corridor, Cajamarca, Lambayeque and La Libertad.

In this sense given by exploiting the agro-ecological characteristics of the valleys that allow avocado harvest between April and November and cover the lower supply of avocado to the EU's comparative advantage, Sierra Exportadora is making efforts and strategies in the three corridors for small andean producers be more competitive: improving production by validating experience and knowledge processes; conversion and increase the area of avocados to the variety "Hass"; promoting the association to improve its negotiating position and generate economies of scale, training in good agricultural practices and articulating with exporters. A new strategy is the management, implementation and certification of Global G.A.P, Fairtrade and Organic protocols to directly access foreign markets taking the integral service given by fruit packing plants on the coast, enhanced partnerships in the corridors forming consortia of the mountain avocado and collective marks.

■ Construction of communication in the supply of commodity type of product

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In human societies, feeding habit is built from the influence of the most diverse areas: cultural, regional, social and historical. The act of eating remains a vital necessity for survival to be modeled in the anthropological profile of human beings and their culture. In this scenario, the work in question seeks to analyze the use of communication of the nutritional values of food consumption habit avocado.

The selection of the corpus for analysis is the information of the nutritional values in the materials of the advertising campaign 'Practice Avocado' from Jaguacy Farm, Avocado producer of Hass and Fuerte, supported by Supermercados Confiança of sales data, from 2011 compared with 2010, in Bauru / SP, Brazil.

In Brazil, the avocado fruit consumption is based on its sweet version, with sugar, also the population does not consider the nutritional appeal of fruit and believe that avocado fattening. The strategy to inform the nutritional values of Avocado, a product with characteristics of a "commodity product", was able to increase sales volume by more than 100% compared to the period where there happened no communication stimulus. The increase in sales in the period show that the effort in dissemination of nutritional values increased the volume of Avocado sales.

In Brazil, the effort in communication is unprecedented and seeks to transform the Hass avocado, until then considered only an unknown fruit for most of the population in a sales success story, with new opportunities for positioning in the consumer market.