



[Exporting fresh avocados to Europe](#)

Imports of fresh avocados to the European market have increased from 186,000 tonnes in 2011 to 343,000 tonnes in 2015. This upward trend is driven by consumer demand for convenience and health food. It creates opportunities for new producers and exporters, especially for the Hass avocado variety. 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)

Hass (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 [Codex Alimentarius Standard for avocados](#) ('Food code' of WHO and FAO)
- The [UNECE standards for avocados](#)
- 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%.

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

- Extra Class
- Class I
- Class II

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.



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).

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

Strong consumer demand in France and Nordic countries

Based on production and trade statistics, the total European consumption of avocados is estimated at 327,000 tonnes, which is around 0.65 kilo per capita. This consumption rate is still relatively low compared to, for example, the USA where people consume four times as much avocados. In Europe,

France is the largest consumer market for fresh avocados. The Nordic countries also consume a relatively large amount per capita. In almost all countries consumption is increasing with an average of 16% annually over the past few years.

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. There are, however, still prospects for growth for green avocado consumption in Eastern Europe and other middle-income countries that experience economic growth, although these market do not have the same volume as Western Europe yet.

Tips:

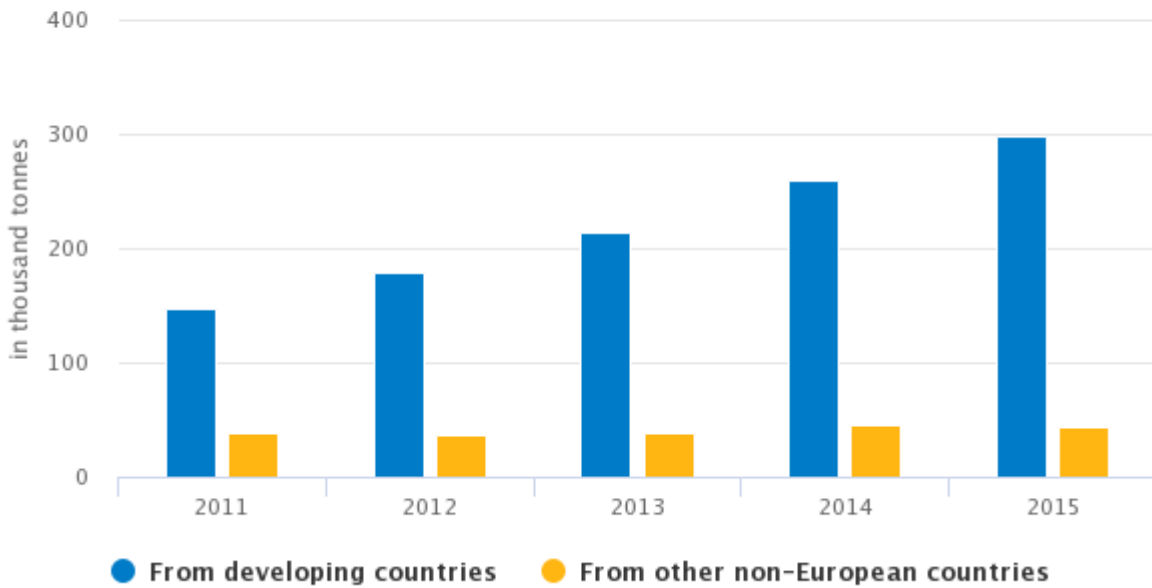
- Avoid the mistake of prioritising quantity over quality when exporting to a growing market. In the end, wholesalers and retailers demand good quality produce and trustworthy suppliers.
- Besides using the main trade channels, also explore retailer requirements and consumer preferences in growing consumer markets in the Scandinavian countries and Eastern Europe. For example, look for information with local distributors in these countries.
- EU buyers and consumers have a growing preference for Hass, especially in Western Europe. Take account of market preferences when planning new plantings. In general, consumer preference for green skin avocados is decreasing.

Avocado imports from developing countries increasing

Imports from developing countries such as Peru, Chile, Mexico and Kenya are increasing, reaching a total of almost 300,000 tonnes (see Figure 1). The rest of European imports (44,000 tonnes) is mainly covered by Israel. While the imported volume increased by over 12% in 2015, the import value increased by 47%, indicating higher prices in 2015.

Figure 1: European import of avocados

2011-2015



Source: Market Access Database

Source: Market Access Database

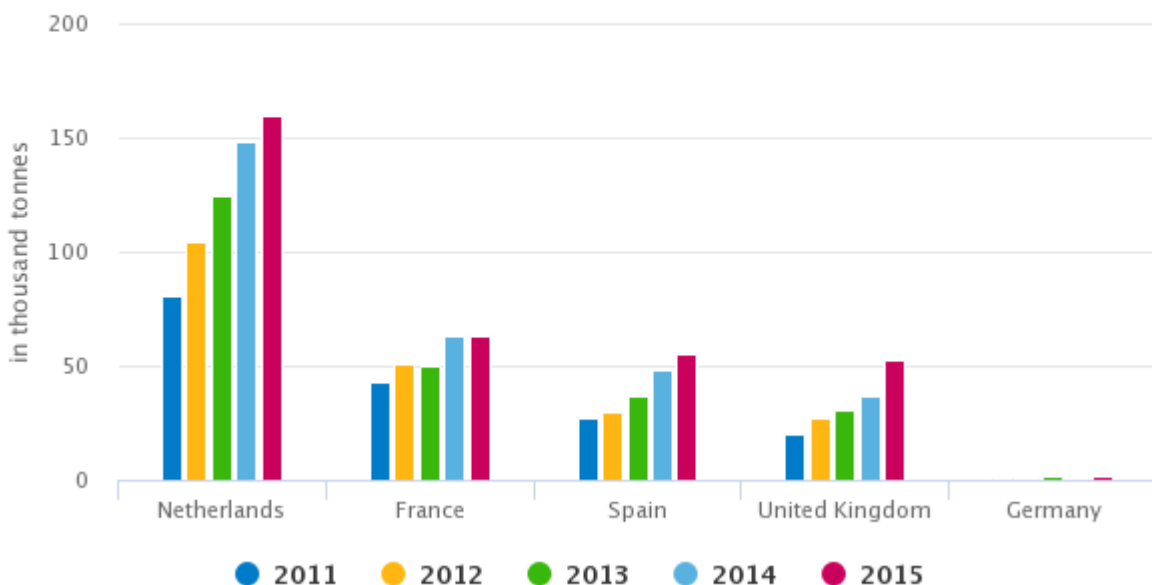
The Netherlands is the main trade hub for avocado

The Netherlands is responsible for 47% of European 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 and the UK. 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 from non-EU countries

2011-2015



Source: Market Access Database

Tips:

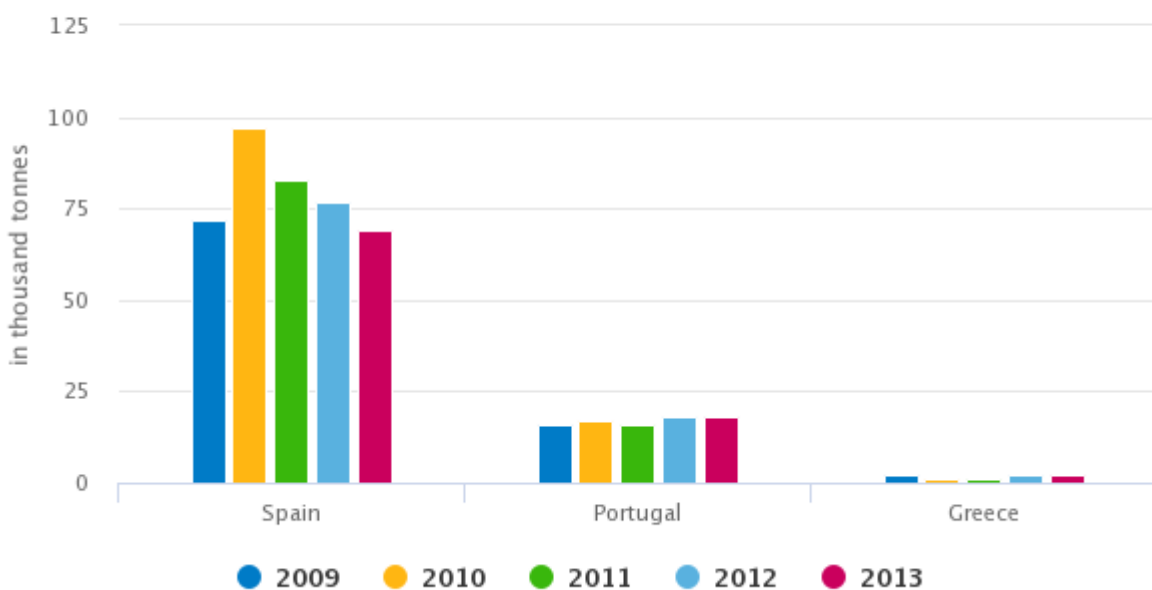
- Make sure that your product is of competitive quality and find trustworthy partners in the EU to optimally benefit from the growing demand. There is a growing market for avocados in the EU but worldwide supply and competition is growing too.
- Consider using the established trade routes and find an importing partner in the Netherlands. The Netherlands has become the dominant importing country in the EU.
- Find a European importer through CBI or by presenting yourself at fairs like Fruit Logistica. For more information: <http://www.fruitlogistica.de/en/>
- Find more information about the supply market for avocados in Europe in the trade section of the South African Avocado Growers' Association ([SAAGA](#)) [Internet site](#).

Spain is an important producer of avocados

With around 70,000 tonnes per year, Spain is the most important producer of avocados in Europe (see Figure 3). But Spanish traders also purchase avocados from abroad to complement their own season and comply with supply contracts. This makes Spain Europe's third-largest exporter of avocados after the Netherlands and Belgium.

In total around 280,000 tonnes are exported by Europe, but most of this is internal trade. Export to non-European countries is limited to around 16,000 tonnes.

Figure 3: European production of avocados
2011-2015



Source: FAOSTAT

Source: FAOSTAT

Tips:

- Make sure that your production expansion is in line with market demand by keeping an eye on market developments using available data and professional journals such as [Freshplaza](#) and [Fruitrop](#).
- Find latest production statistics for fresh avocado production at the Statistics division of the Food and Agriculture Organisation ([FAOSTAT](#)).

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.

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. 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.

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. Certification schemes that are in line with the [Global Social Compliance Program \(GSCP\)](#) will have a higher chance of being accepted by European supermarkets. The general [trends in fresh fruit and vegetables](#) provides further insight into different types of certifications. See the buyer requirements for [fair and sustainable fruit production](#) below for more information.

Tip:

- Check the [Global Social Compliance Program \(GSCP\)](#) 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, there is also a growing interest in organically produced fruit and vegetables. The demand for organic avocado is growing, but not fully satisfied due to the difficulty of producing organic avocado. Organic avocados are a growing niche and sold by both specialized and main retailers. See the [buyer requirements for organically produced fruit](#) below for more information.

Tip:

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

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 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.

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.

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 [Export 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?

Minimalise 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](#) in the EU Export Helpdesk. 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.

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.

What are the requirements for niche markets?

Growing demand for organic avocados

An increasing number of EU 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 the EU, you have to use organic production methods according to [EU legislation](#). Furthermore, you have to use these production methods for at least two years before you can market your avocados as organic. In addition, you (or your EU importer) must apply for an import authorisation from EU organic control bodies. After being audited by an accredited certifier, you may put the [EU organic logo](#) on your products, as well as the logo of the standard holder, for example [Soil Association](#) (especially relevant in the UK), [Naturland](#) (Germany) or [Bio Suisse](#) (Switzerland). Some of these standards are slightly different, but they all comply with the EU legislation on organic production and labelling.

Tips:

- Implementing organic production and becoming certified can be expensive, so assess the market potential before making any investments.
- Consult the [Standards Map database](#) for information about the different organic certifications.
- For the export of organic avocados into the European market, use a specialised importer, who understands the market and knows the way into niche markets with their particular requirements. For example, use the database of [Organic-Bio](#).

Fair and sustainable

There is increasing attention to the social and/or environmental conditions in the producing areas. Most European buyers have a social code of conduct which they expect you to adhere to. For avocados social compliance is important, although in day-to-day trade product quality is the top priority. A few specialised buyers offer an extra opportunity for socially certified products.

Buyer initiatives which have an impact on you as a supplier in terms of social compliance:

- the [Ethical Trading Initiative](#) (ETI) in the UK
- the [Business Social Compliance Initiative](#) (BSCI) in North-Western Europe.
- the [Global Social Compliance Programme](#) (GSCP), which provides reference and self-assessment tools

Examples of social or sustainable labels for fresh fruit and vegetables are:

- [Fair for Life](#)
- [Fairtrade](#)

Tips:

- Check your company's current performances, for example by doing a self-assessment on the [BSCI website](#).
- Consult the [Standards Map database](#) for more information and for differences between fair trade labels.

5 . 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](#).

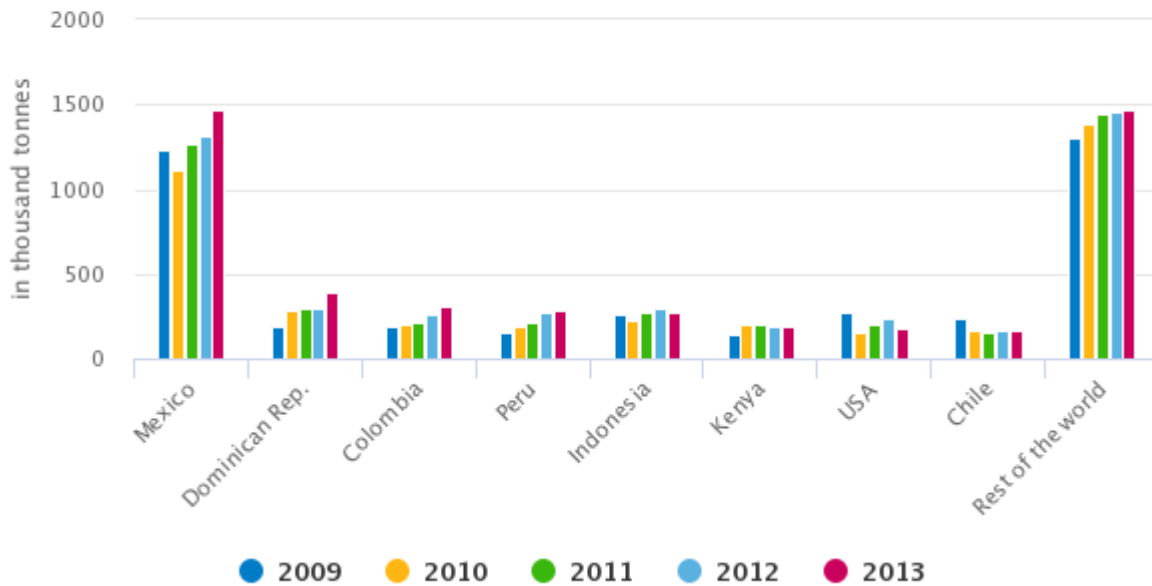
In this section market entry opportunities and barriers as well as competition on company and product level regarding avocados are listed.

Company competition

The majority of fresh avocados in the European market are sold through large supermarket chains, even more so in Northwestern Europe. The buyer power of large supermarkets is very strong, so their buyer requirements are very important. The negotiating position of suppliers towards European importers is gradually improving, but the probability of receiving a fair price continues to depend on strong retailers and the negotiation skills of their direct suppliers.

Figure 4: Global production of avocados

2009–2013



Source: FAOSTAT

Source: FAOSTAT

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 the largest producer with almost 1.5 million tonnes in 2013. The Dominican Republic, Colombia, Peru and Indonesia all produce between 0.2 and 0.4 million tonnes of avocados. The main supplier to the European market is Peru, followed by Chile, South Africa, Israel, Mexico and Kenya. All are increasing their supply to Europe while the demand is still growing. Colombia and Morocco are also becoming important suppliers. Your competition from other countries is determined by the supply season (see supply calendar in Table 2).

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, as well as supply chain transparency and information sharing. European buyers look for long-term partnerships to ensure product supply and 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 used in salads, sandwiches, in spreads and sauces. There are no other products similar to avocados, therefore the risk of replacement is limited.

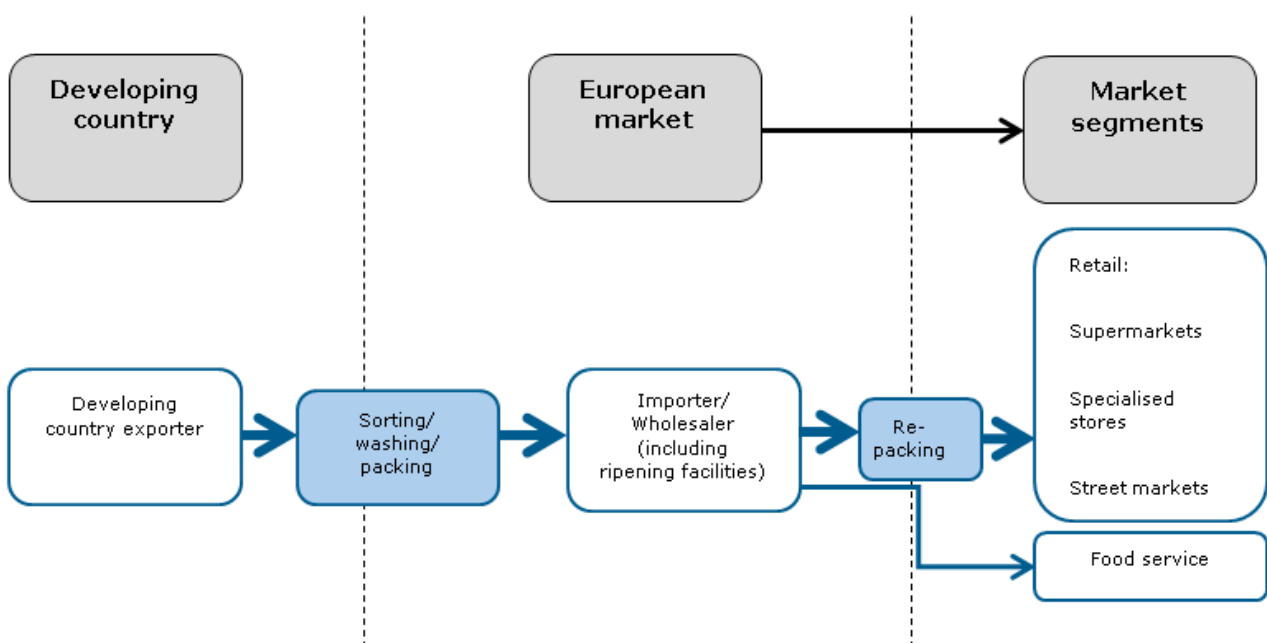
Tips:

- Become part of a long term retail programme and improve your company's performance by building relationships with experienced buyers.
- Do not compete on price alone, but build partnerships with buyers/ripening facilities and strive for excellent product quality and handling.
- Establish a credible track record including transparent information on your company and product quality. Being part of a stable partnership and being a trustworthy supplier can help you to establish and maintain your position on the market.
- 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.

6 . 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 5: Market channels for Fresh Fruit and Vegetables in the European market



Importers in the Netherlands form an important hub into 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 retail stores. Large retail stores (so-called hypermarkets) in Spain and France are a dominant market channel. Large retailers and Northwestern 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).

7 . What are end market prices for avocado?

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 between 1 and 1,5 euros ('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. Prices on street markets are usually lower than in supermarkets.

Pricing slightly lower in peak season

European avocado prices are slightly lower during the summer months when the product is available from 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.

Tip:

- For an indication of wholesale prices, find information at [the Fresh Portal](#) or [Freshplaza](#). Remember that these are the average prices wholesalers 'want' to get for their avocados, but actual sales prices can be much lower.
- 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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