

Final report

Project title:

China Market Study Tour

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AV23012

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Public summary

The levy-funded Avocado Export Development Strategy 2022-26 and the Avocado Fund SIP 2022-26 outlines the actions and outcomes necessary to support the growth and diversification of the Australian avocado industry. China has been identified as a crucial market for this strategy, given its potential to drive future industry expansion. To support and advance the objectives of the Avocado Export Development Strategy 2022-26 and Avocado Fund SIP 2022-26, project AV23012 was initiated. Led by Avocados Australia (AAL), AV23012 ran from August 2023 to December 2024, with key goals to:

- Gather market intelligence to strengthen the business case underpinning the China market access strategy.
- Build cooperative R&D relationships and alliances with key avocado and agricultural stakeholders.
- Gain insights into the Chinese avocado market and supply chain to support future commercial trade.

Major Achievements

- Conducted six face-to-face engagements and one avocado tasting session with the General Administration of Customs China (GACC) at CIIE.
- Featured in a two-minute live TikTok broadcast with a Key Opinion Leader (KOL) on CCTV, reaching an audience of over 1 billion viewers.
- Secured a pre-purchase agreement between Shanghai Huizhan Fruit Markets and Avocados Australia, valued at AUD\$300 million.
- Established a cooperation agreement with Joy Wing Mau, China's largest fruit importer.
- Formed a strategic partnership with JD.com, China's largest e-commerce platform, which generates an annual gross sale of USD\$600 million, and is the country's leading online reseller of fresh avocados.
- Entered a cooperation agreement with Sinomach, China's largest agricultural State-Owned Enterprise and a major importer of fresh avocados.
- Developed collaboration agreements with the Yunnan Department of Agriculture & Rural Affairs and Xishuangbanna Dai Prefecture of Agriculture to enhance avocado industry resilience, productivity, and profitability in both regions.
- Established cooperation agreements with key Chinese trade organizations, including the China Import-Export Quarantine and Inspection Association (CIQA) and the China Chamber of Commerce of Import & Export of Foodstuffs, Native Produce & Animal By-Products (CFNA).
- Formed a cooperation agreement with Sichuan State-Owned Assets Operation Investment Administration, the largest fruit distributor in Southwest China.
- Approval and successful export of 800kg of Hass avocados to the 7th China International Import Expo (CIIE) under GACC Special Protocol Permit.

Key Outcomes

The project delivered substantial benefits across multiple areas, including:

- Increased awareness of Australian avocados within the Chinese trade and market access ecosystem.
- Strengthened confidence among Chinese customs authorities in Australia's ability to safely export fruit under a conditional non-host pathway, as demonstrated at CIIE.
- Enhanced knowledge among Australian avocado growers and exporters regarding China's fruit supply chain, importer and retailer requirements, and competitive landscape.
- Gained access to market entry protocols from countries with existing avocado trade agreements with China.
- Received an invitation to participate in the China International Fruit Conference (April 2025).
- Established the inaugural China-Australia Avocado Symposium (April 2025), creating a platform for bilateral industry collaboration.
- Initiated an inbound trade and study mission for Shanghai Huizhan Fruit Market (June 2025), further fostering trade relationships.
- Proposed booth collaboration with JD.com at the China International Fruit Expo (August 2025), providing a major promotional opportunity for Australian avocados.

Keywords

Avocados; Australian avocados; market access; future; trade; cooperation; knowledge; symposiums; technical exchange; R&D; study; China; Yunnan; Xishuangbanna; Beijing; Shanghai; Huizhan; CIFE; CIIE

Introduction

This project was undertaken in response to the growing need for greater access to new export markets for the Australian avocado industry. In 2024, Australian avocado production reached 150,000 tonnes, with projections indicating an increase to approximately 170,000 tonnes by 2026. Given the imminent imbalance between domestic supply and demand, securing and expanding export markets is critical for the industry's long-term sustainability.

In 2024, China overtook Japan as the largest avocado importer in Asia, with imports reaching approximately 80,000 tonnes. This shift underscores the necessity of AV23012 as a strategic de-risking initiative aimed at preparing Australian avocados for market access. The project also sought to equip Australian avocado farmers and exporters with a deep understanding of both the Chinese supply chain and their own industry's competitive landscape.

A key driving factor behind this project is that avocados have been approved by the International Market Access Advisory Panel (IMAAP) for inclusion in the China market access pool. Avocados are now seeking prioritisation as the next commodity to be selected from the IMAAP pool for technical market access negotiations. To support this initiative, Avocados Australia must demonstrate to the Department of Agriculture, Fisheries, and Forestry (DAFF) that the industry possesses strong technical capability and can deliver financially sustainable returns to the Australian economy.

To advance our market access strategy, direct engagement in China is essential. This includes sourcing market intelligence, building relationships, fostering collaboration, exchanging knowledge, overcoming supply chain challenges, and deepening cultural and commercial connections. The achievements and outcomes detailed in the Public Summary illustrate how AV23012 has laid the foundation for export and trade with China by facilitating these critical engagements.

As a key linkage, previous projects—particularly AV20004—demonstrated that participation in major fruit expos significantly enhances country brand recognition and generates commercial benefits for Australian avocado exporters. Building on the learnings from AV20004 and AV23003, AV23012 participated in two of China's most influential fruit import expos: the China International Fruit Expo (CIFE) and the China International Import Expo (CIIE).

Through a strategic partnership with More Yogurt, China's leading avocado smoothie bar operator with over 2,000 stores, Avocados Australia activated booths at both expos. This activation served as a highly effective exposure platform for Australian avocados, drawing significant foot traffic to our booth and creating meaningful engagement opportunities for Australian exporters. The smoothie bar activation not only facilitated direct introductions and conversations but also generated substantial media attention, further elevating the profile of Australian avocados within the Chinese market.

By executing this strategic approach, AV23012 has strengthened Australia's avocado export readiness, enhanced industry visibility in China, and positioned Australian growers and exporters to successfully enter and compete in this high-potential market once access is secured.

Methodology

AV23012 was a future commercial trade development project to generate intelligence, insights, knowledge and build awareness of the Australian avocado industry and brand. The **methods** used to achieve outcomes for the study component were symposiums and stakeholder engagement with key Chinese organisations relevant to the market access ecosystem. The methods to achieve outcomes for the activation component were key Chinese fruit expos.

1. Study component -

- Separate symposiums with Yunnan Provincial Department of Agriculture and Rural Affairs, Xishuangbanna Dais Prefecture Department of Agriculture (autonomous region within Yunnan), and Sichuan Provincial Department of Agriculture and Rural Affairs -
 - Australian avocado growers and exporters are interested in the development of the Chinese avocado industry. The Chinese avocado industry has long been an immature and embryonic industry, however in the recent two to three years, there has been steady growth and investment in the development of the Chinese avocado industry largely due to the increased consumption within the Chinese diet.
 - It is important for Australian growers and exporters to understand the investment level and the growth capacity of the Chinese avocado industry to make better informed decisions when assessing their own participation in this market. It was important for the participants to see firsthand the challenges the Chinese avocado industry will face in trying to expand.
 - 90%+ of China's avocado production is within the Yunnan and Sichuan provinces due to climatic and geographical factors. It was important for the project to convene symposiums with the leaders of the Yunnan, Xishuangbanna and Sichuan agricultural departments to truly understand and appreciate what they see as the obstacles and opportunities for the avocado industry in China
- The delegation undertook numerous in-field avocado farm visits in Xishuangbanna. The delegates were interested to understand Chinese production skills, capabilities, inadequacies, growth trajectories and challenges. Meetings and discussions were convened between the project and key stakeholder organisations within the market access ecosystem including GACC, CIQA, CFNA, China Fruit Marketing Association (CFMA), China Agricultural Wholesale Markets Association (CAWA), Ministry of Commerce (MofCom)
 - These above organisations have input to and cooperate within the market access ecosystem. It was integral to the project mission to gain insight and intel on how to improve Australian avocado market access readiness.
 - These organisations have previously cooperated with other countries that already have avocado market access to China, and it was important to learn about the phytosanitary approach to market access.
 - These organisations have access to the import, wholesale and retail supply chain, and much needed valuable insights were needed to help Australian avocado exporters appreciate the supply chain complexities, challenges, and opportunities.
 - These organisations hold knowledge and intelligence on the performance of competing avocado importing countries and are able to provide insight to ways Australian avocado exporters can best prepare and position themselves to succeed in the Chinese market.
 - GACC ultimately hold the key to market access for Australian avocados to China. GACC are the only authority to release Special Permits for CIIE. It was critical this project communicated and cooperated with GACC to submit and receive a Special Permit so that Australian exporters could ascertain some of the challenges associated with the supply chain from Australia to China.
- AAL attended The Second Symposium of Typhritid Workers of Asia, Australia and Oceania (TAAO), Beijing, 6 May 2204. Peter Leach, FASTA Director, presented the FASTA project, and highlighted some of the opportunities and pathways for Australian fruit into China under some current and pending R&D. GACC were in attendance and AAL had the opportunity to meet and introduce Australian avocados.

2. Future Commercial Trade Development component –

○ China International Fruit Expo (CIFE)

- CIFE is widely regarded as the premier fruit expo in China. Hosted by the China Chamber of Commerce for Import and Export of Foodstuffs, Native Produce and Animal By-products (CFNA), CIFE provides Australian avocado exporters with a valuable platform to engage and build relationships with key Chinese avocado importers. Through these engagements, exporters gained crucial insights into the needs and expectations of importers, wholesalers, and retailers, fostering a deeper understanding of the Chinese avocado market.
- Although the project was unable to exhibit Australian avocado fruit at CIFE, a strategic partnership was formed with two prominent local Chinese companies—More Yogurt and SupaFresh—to assist with the expo booth activation. More Yogurt, China’s leading avocado smoothie bar operator, boasts approximately 2,000 stores across Mainland China and processes around 20,000 tonnes of fresh avocados annually. SupaFresh, one of China’s largest avocado importers, supplied the CIFE smoothie bar activation with a fresh daily supply of locally grown Yunnan Hass avocados.
- Beyond the expo itself, CIFE served as a gateway for the project participants to undertake field visits to key importer warehouses in Shanghai, including Riverking and SupaFresh. These site visits allowed Australian avocado exporters to study the supply chain dynamics and distribution networks that facilitate avocado imports into China.
- The project leveraged the opportunity to visit the Shanghai Huizhan Fruit Market, where participants assessed the quality of imported avocados available on the market floor. This benchmarking exercise provided exporters with a better understanding of product standards in China. The market visit also served as a crucial networking platform, enabling exporters to establish connections with key importers and exchange market intelligence. During the visit, project participants engaged with the executive leaders of the market management team, discussing the demand for Australian avocados and exploring the market’s potential for future imports.

○ 7th China International Import Expo (CIIE)

- The China International Import Expo (CIIE) is commissioned by the Ministry of Commerce (MOFCOM) and supported by the General Administration of Customs of China (GACC) and CFNA. This expo serves as an unparalleled platform for Australian avocados to make their debut in the Chinese market. As part of the International Market Access Advisory Panel (IMAAP) pool for China, Australian avocados are seeking market access prioritisation once Australian mainland apples gain approval, which is widely expected to occur in 2025. Given this timeline, the opportunity for Australian avocado growers and exporters to showcase their product at CIIE was particularly significant.
- Securing a Special Permit for the event, the project successfully facilitated the shipment of 800kg of fresh Hass avocados to CIIE. Building upon the strategic relationship established with More Yogurt at CIFE, the activation was replicated at CIIE, but this time featuring Australian avocados instead of Chinese avocados. The initiative proved highly successful, with 17,000 Australian avocado smoothie samples distributed and over 200kg of fresh avocado slices served with soy sauce. This activation not only provided an opportunity to highlight the quality and appeal of Australian avocados but also reinforced relationships with key stakeholders in the Chinese fresh produce industry.
- The project considered the Special Permit the opportunity to demonstrate to GACC that Australian avocado exporters can effectively comply with the GACC’s import and quality standards, helping build a good reputation for a future Trade & Market Access Submission review.

Results and discussion

Already highlighted, Project AV23012 had a strong focus on building alliances with Chinese organisations and stakeholders that have information, insights, and historical knowledge about market access, the Chinese avocado supply chain, and the Chinese avocado industry. AV23012 set out to build enduring working and collaborative relationships to act as channels for the Australian avocado industry to gain enduring and sustainable connectivity to information, insights and knowledge for the benefit of pre-market access readiness and post market access activities/execution.

Results

1. Nine cooperation agreements, accompanied with official ceremonies, with key Chinese organisations associated with avocado trade
2. \$AUD300million pre-purchase agreement with Shanghai Huizhan Fruit Market
3. Two in-bound study tours by Chinese avocado importers
4. Commitment for an in-bound study tour by Executive Leadership Team of Shanghai Huizhan Fruit Market (Avo Connections and Bundaberg visit, June 2025)
5. Special Permit approval from GACC to export 800kgs of fresh Hass to CIIE
6. Industry participation on outbound tours to China – six growers
7. Five avocado technical and market access exchanges/symposiums -
8. China Import-Export Inspection & Quarantine Association, 1 August 2024, Beijing,
9. Yunnan Provincial Department of Agriculture and Rural Affairs, 30 August 2024, Kunming
10. Xishuangbanna Dais Prefecture Department of Agriculture, 1 September 2024, Xishuangbanna
11. Sichuan Provincial Department of Agriculture and Rural Affairs, November 1, 2024, Chengdu
12. China Academy of Agricultural Sciences (CAAS), 6 September 2024, Beijing
13. Commitment to Inaugural China-Australia Avocado Symposium by Yunnan Provincial Department of Agriculture and Rural Affairs (Yunnan, April 8-9, 2025)
14. Two promotional smoothie bars with distribution of 26,000 avocado smoothie samples and 200kgs of fresh avocado and soy sauce samples
15. Four meetings with Australia Commissioner-Counsellor of China
16. Study tour participants engagement with Australian Ambassador to China
17. Official introduction to GACC at CIFE by Shanghai Huizhan Fruit Markets
18. Seven discussions with GACC, and one meeting with MofCom at CIIE
19. One Hass avocado sampling meeting with GACC at CIIE
20. One meeting with China Academy of Agricultural Sciences (CAAS)
21. Three meetings with Australia Chamber of Commerce China (AustCham China)

Understanding the Chinese market, and locating the opportunities for Australian avocado growers and exporters

1. Competitor countries currently with market access to China – New Zealand, Vietnam, Venezuela, Mexico, Columbia, Ecuador, Guatemala, Chile, Peru, Tanzania, Kenya, South Africa, Israel
2. Mainland China has three first tier fresh fruit markets; Guangzhou, Shanghai and Beijing. Importers in these cities have integrated avocado ripening rooms as a demonstration of the advancement of supply chains.
3. Mainland China has circa 420 fresh fruit markets with many of these located in smaller and lesser populated regional cities. CAWA are the association representing wholesale fruit and vegetable markets across mainland China.
4. China is the fastest growing avocado importer in Asia, surpassing Japan in 2024 with circa 80ktonnes.
 - 70% of China's avocado imports are from Peru. 100% Hass.
5. Yunnan and Sichuan Provinces produce 90% of China's avocados. It is unknown the varietal percentage grown in China, but Chinese avocado industry leaders estimate national production to be upward of 75% Hass.
 - a. Anderson Horticulture, an Australian based nursery, has developed a joint venture in Xishuangbanna, Yunnan Province, with U-Avo, a local avocado consultancy. Together, they have established an exclusively Australian rootstock nursery to sell in the China market.
6. From the intelligence gathered by AV23012, most countries with technical market access to China rely on a Methyl Bromide fumigation pathway. There is no known existing efficacy data for species of fruit fly treated with

- Methyl Bromide fumigation. To the knowledge of AV23012, Methyl Bromide fumigation has been relied upon by GACC as the default treatment for the safe phytosanitary pathway for avocados to China.
7. Chinese importers have grown intolerant of the volatile and inconsistent quality of imports and therefore seek accelerated access to Australian avocados. The volatile quality is causing a difficult downstream relationship with their retail and food service customers.
 - Chinese fruit importers advise their confidence in Australian citrus, table grapes and stone fruit. This confidence helps create an impression of quality for Australian avocados.
 8. Leading avocado importers are SupaFresh, Riverking, Now Frutti, Shanghai Wonong, Wellfruit, Shouyang Fruit, Pagoda, Joy Wing Mau
 - majority of these importers have operations in Guangzhou and Hong Kong. It is widely known that these importers see the tremendous quality of Australian Hass and Greenskin varieties in Hong Kong which helps the demand for our fruit in China.
 9. China is undergoing a wave of cuisine innovation with avocado. Chinese chefs are adopting western style consumption of avocado with the introduction of avocado on toast, guacamole, fresh cut avocado with salad, avocado tempura.
 10. Many famous Peking duck restaurants are introducing avocado salad as an appetizer to the Peking duck.
 11. JD.Com is the largest, and fastest growing e-commerce fresh fruit market with a customer base of 600million in mainland China.
 12. China has a diverse portfolio of retailers spanning across different store footprints -
 - bulk pack - Sams Club, Costco
 - hypermarket - RT-Mart (Sun Art Retail Group, controlled by Alibaba), Carrefour, Walmart
 - supermarkets - ÆON (Japanese), Aldi (Aldi Süd, German), Auchan (French), RT-Mart (Taiwanese), Carrefour (French), Walmart (American), Tesco (British) , Subsidiaries of China Resources, including CR Vanguard, Ole', BLT, Suguo, Subsidiaries of AS Watson, including PARKnSHOP and Taste, CitySuper, Hema 盒马, Lianhua Supermarket/BHG, Lotte Mart (Korean), Lotus Supermarket, Wumart, Fulande, Jingkelong, Baozhen (Guarantee) in Hainan, Fields, CityShop, Parkson, Freshmart, Ito Yokado (known as Huatang in Mandarin), Bai Hua Bai Huo 百花百货, Feidan, Pines, Jenny Lou's, Epermarket, Yonghui (aka Bravo)
 - e-commerce - JD.com, Pinduoduo (also owns Temu), Hema Supermarket (Alibaba), Pagoda

What do these results and findings mean for us

1. Strategic Alliances and Cooperation Agreements

- Significance of the nine cooperation agreements in strengthening industry relationships.
- Impact of official ceremonies in reinforcing bilateral trust and collaboration.
- Long-term benefits of these agreements for market access and knowledge sharing.

2. Major Commercial agreement and Investment Commitments

- The \$AUD300 million pre-purchase agreement with Shanghai Huizhan Fruit Market—its implications for Australian avocado exporters.
- How this agreement establishes a foundation for future trade growth.
- Potential scalability of similar agreements with other Chinese distributors.

3. Trade Missions and Study Tours

- The role of in-bound study tours in building importer confidence.
- The significance of the upcoming visit by the Executive Leadership Team of Shanghai Huizhan Fruit Market.
- Outcomes of the two completed in-bound study tours and the benefits for Australian growers.

4. Special Permit and Market Entry Success

- Importance of the GACC special permit for exporting fresh Hass avocados to CIIE.
- How this approval sets a precedent for future exports.
- Challenges and opportunities associated with regulatory approvals.

5. Industry Engagement and Knowledge Exchange

- The participation of six Australian growers in outbound tours—insights gained and industry benefits.
- The role of five technical exchange meetings/symposiums in Kunming, Xishuangbanna, Chengdu, and Beijing (two) in shaping industry discussions.
- The significance of the proposed inaugural China-Australia Avocado Symposium in fostering collaboration.

6. Market Promotion and Consumer Engagement

- Success of the promotional smoothie bars in increasing Australian avocado awareness.
- Distribution of 26,000 avocado smoothie samples and 200kgs of fresh cut samples—impact on consumer perception.
- Opportunities for further product innovation (e.g., avocado-based products tailored for Chinese consumers).

7. High-Level Government and Institutional Engagement

- The value of meetings with the Australian Commissioner-Counsellor of China in strengthening government support.
- The significance of discussions with GACC and MoFCom at CIIE in streamlining regulatory processes.
- The role of China Academy of Agricultural Sciences (CAAS) in research and industry collaboration.

8. Business and Trade Advocacy

- The importance of collaboration with AustCham China in navigating the Chinese market.
- Strategies for Australian avocado industry players to leverage these business connections.
- Future efforts to enhance Australia-China avocado trade relations.

Outputs

Output	Description	Detail
Cooperation Agreements	Co-signed agreements with future commercial trade partners and agricultural organisations	Agreement for ongoing engagement on information exchange, knowledge gathering, and activity cooperation to advance the prospects of the Australian avocado industry in China. Appendix 1 – photo
Trade Expos	China International Fruit Expo (CIFE) China International Import Expo (CIIE)	These two trade expos are both platforms for Australian avocado growers and exporters to meet, greet, and build conversations about future trade partnerships with importers, wholesalers, retailers, and consumers. Sampling Australia’s Hass at CIIE allowed for feedback and competitor benchmarking. This also allowed for Australian exporters to showcase their quality, brand, and provenance. Participating in these trade shows was demonstration to China’s regulators, our commitment to the Chinese market and to build their confidence in our product. Activating a smoothie bar in each CIFE and CIIE with More Yogurt illuminates to all Chinese milk tea, smoothie bars, and other avocado value-add food service operators of Australian avocados. Appendix 2- Photos
Access to other country protocols	Support Australian avocado market access phytosanitary strategy to China	AV23102 was able to obtain information pertaining to avocado protocols for Venezuela, Tanzania, Kenya. Information in these protocols will help to inform Australia’s technical market access submission.
Avocado symposiums, technical exchange meetings, market access information gathering	<ul style="list-style-type: none"> • Yunnan Provincial Department of Agriculture and Rural Affairs • Sichuan Provincial Department of Agriculture and Rural Affairs • Xishuangbanna Dais Prefecture Department of Agriculture • China International Fruit Conference 	<ul style="list-style-type: none"> • key agenda item; to help gain an understanding of China’s market access 2x2 market access regulatory and administrative process. <ul style="list-style-type: none"> ○ AV23012 is advised that when one commodity from each country is approved and announced (announcement is simultaneous), a new commodity from each country is nominated to replenish the approved commodity and to make the 2x2 full again. • Avocado technical exchange meeting/Symposium <ul style="list-style-type: none"> ○ Exchange information about

	<p>(symposium)</p> <ul style="list-style-type: none"> • The Second Symposium of Tephritid Workers of Asia, Australia, and Oceania (TAAO) • China Import-Export Inspection & Quarantine Association 	<p>respective avocado industries; production, yields, disease, irrigation and water management, mulching, rootstock, chemicals, post-harvest management, flushing, flowering</p> <ul style="list-style-type: none"> ▪ China has systemic phytophthora problems severely affecting yields ▪ Many avocado farmers are planting other crops amongst the avocado trees. These other crops require different chemicals, and these chemicals are adversely affecting the health and development of the avocado trees ▪ Best practice production knowledge is low. Until knowledge is improved, will there is substantive improvements in yields and quality. ▪ China’s agriculture land use policy is restricted to rubber, tobacco, sugar, rice. And provinces find it hard to gain Beijing’s approval to release land for new avocado planting and existing crop expansion. <ul style="list-style-type: none"> • The Second Symposium of Tephritid Workers of Asia, Australia, and Oceania (TAAO) – Beijing <ul style="list-style-type: none"> ○ AAL attended this Symposium with Peter Leach, FASTA Director, The Symposium addressed key matters associated to fruit fly research. Peter Leach presented the FASTA project with GACC in the audience. ○ Chinese biosecurity and phytosanitary stakeholders addressed market access barriers and opportunities. <p>Appendix 3- Photos</p> <p>Link to TAAO Symposium, Beijing, 2024</p>
Articles for Talking Avocados	Audience are growers, packers and exporters to gain updates and knowledge from the project.	<p>TA is a dedicated channel for AAL to connect and update industry. AAL provides Market Access updates in each TA edition, and progress updates were provided on AV23012.</p> <p>Please refer to Appendix 5 for TA editions</p>

		between November 2023 – December 2024. Appendix 4 - article sample
Industry adoption. Presentations at Regional Export Forums	Audience are growers, packers and exporters. Gain updates and knowledge from the project.	Regional Export Forums is the main channel for AAL to communicate face to face with industry. At multiple forums, AV23012 updates were presented to industry with Q&A time. Appendix 5 - photo
Inbound visits	Inbound visits from Chinese avocado importers; Riverking and Sichuan State-Owned Assets Operation Investment Administration.	AV23012, with the support, Trade and Investment Queensland and Western Australian Government (DPIRD), hosted two inbound visits from Riverking and one visit from Sichuan State-Owned Assets Operation Investment Administration. Riverking and Sichuan Administration took market, retail, farm, and packshed visits to learn about our production, quality controls, supply chain, and marketing. Sichuan Administration visited Queensland Department of Primary Industries' laboratory to gain a better understanding of our technology capabilities. Appendix 6- Photo
Marketing and promotional exposure	At CIIE, China Central Television (CCTV) attended Avocados Australia booth	CCTV are China's dominant State-Owned media outlet. CCTV is television across all China with access to an estimated 1.6billion people. CCTV attended the Avocado Australia booth for a live cross to its audience. The live cross created enormous attention on our booth and Australian avocado exporters were able to showcase their brand and fruit. It was estimated by CCTV our exposure was to circa 1billion viewers via the TV CCTV social media channel (Tik Tok Chinese Social Media platform). Appendix 7- Photo
Premarket visit briefing with DAFF	AV23012 briefed Australia's Counsellor-Commissioner to China and DAFF Market Coordination and Strategy	Via teleconference, AV23012 provided two separate pre-market visit briefings to DAFF; prior to Study Tour leg to CIFE, Yunnan, and Shenzhen, and CIIE. Australia's Commissioner-Counsellor to China and Market Coordination and Strategy were present at the pre-market briefings.
Meeting with Chinese supply chain stakeholders to gain key insights	Delegation gaining insights how to integrate into Chinese supply chain	AV23012 introduced the study tour delegates to organisations across the entire supply chain <ol style="list-style-type: none">1. Cosco China – shipping and customs clearance agent. For the 800kgs of fresh Hass for CIIE, Cosco Shipping helped arrange the customs paperwork for clearance with GACC. And helped monitor the fruit for ripening in

		<p>preparation for the expo.</p> <ol style="list-style-type: none"> 2. Joy Wing Mau (JWM) robotic warehouse tour – JWM’s state of the art artificial intelligence robotic warehouse is considered the most sophisticated in Asia. The delegation got a handheld tour of the warehouse and was briefed on how they procure, ship, store, and distribute to customers. 3. Shanghai Huizhan Market tour – of market floor and introduced our delegates to avocado importers. The delegation received a presentation on the operations of the market and how to best trade with the market and its members (importers and wholesalers). 4. Beijing Fruit Market tour – of market floor 5. Retail tours – during the entirety of the project, with the support of Trade and Investment Queensland China Team, visits to Aldi, Hema (Alibaba), Bravo, Pagoda, Walmart, Carrefour, and AEON. At CIFE, delegates received instore supply chain presentations from the fruit buyers of Haoguoyuan, Ole, and Hema. <p>Appendix 8 - photo</p>
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Outcomes

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Better informed China market access strategy	<ul style="list-style-type: none"> Develop export markets Improve technical access to high-value markets as identified within the export strategic plan 	improved knowledge base of industry and DAFF to support a better technical market access opportunity and negotiation	Access to some protocols for counties that have avocado market access to China
Future commercial trade agreements and relationships	<ul style="list-style-type: none"> building international trade opportunities to diversify markets access to new high-value markets 	<ul style="list-style-type: none"> Avocados Australia and Shanghai Huizhan Fruit Market signed an AUD\$300m pre-purchase agreement Avocados Australia signed cooperation agreements to foster future commercial trade opportunities; JD.com, Joy Wing Mau, Sinomach, Sichuan State-Owned Assets Operation Investment Administration. In-bound market visits by Riverking and Sichuan State-Owned Assets Operation Investment Administration. 	Co-signed agreements and on farm field trips
Showcasing Australian avocados in China and Expo participation	Increase exporters capability	<ul style="list-style-type: none"> shipment of fresh Hass avocado from Australian to Shanghai. Attendance and participation at CIFE and CIIE 	<ul style="list-style-type: none"> New networks with China's avocado importers, wholesalers, and retailers Special Permit from China's customs agency, and DAFF avocado phytosanitary

			certificate to release avocados to China.
Strengthen cooperation with China avocado and agricultural industry	Export market cooperation	Avocado technical exchange meetings, symposiums, and workshops with key Chinese agricultural stakeholders	<ul style="list-style-type: none"> • Strategic Cooperation Agreement signed with Yunnan Provincial Department of Agriculture and Rural Affairs • Cooperation Agreement signed with Xishuangbanna Dais Prefecture Agricultural Department • Sichuan Provincial Department of Agriculture and Rural Affairs – agreement to participate in future R&D and cooperation activities in China and Australia • China Import-Export Quarantine and Inspection Association – agreement to participate in future R&D and cooperation activities in China and Australia • China Academy of Agricultural Sciences – agreement to participate in future R&D and cooperation activities in China and Australia

Monitoring and evaluation

To capture important intelligence that feeds into this Final Report, post mission face-to-face delegation evaluation discussions were convened. Other evaluations were undertaken in the form of individual interviews and an online Performance Survey.

Performance and Evaluation Findings

The Avocado China Market Study Tour Survey (AV23012) gathered feedback from 10 (out of 15) delegates regarding their experiences and perceptions of the tour. The results indicate that the tour was highly successful in meeting its objectives. A significant portion of the delegates rated their increase in knowledge and understanding of the Chinese market as outstanding or exceeding expectations. Similarly, most respondents found that the tour effectively advanced future market access credentials and provided valuable insights into commercial trade opportunities in China. Networking opportunities were another strong point, with all participants expressing satisfaction in their ability to build relationships with Chinese importers and wholesalers.

The tour also contributed positively to delegates' understanding of consumer consumption trends in China, with a majority rating this aspect as outstanding or exceeding expectations. Avocados Australia's communication and support were well received, with all respondents expressing satisfaction with staff assistance. In terms of market intelligence and commercial partnerships, participants reported high levels of satisfaction with the insights gained for market access strategy, trade partnerships, and supply chain knowledge. However, while most were satisfied with travel arrangements, accommodations, and hygiene standards, a small portion of delegates expressed dissatisfaction. Representation of the Australian avocado industry also received mostly positive feedback, though one delegate rated it very unsatisfactory.

Looking forward, nearly all respondents indicated they were highly likely to recommend the tour and participate in another similar initiative. There was unanimous support for ongoing cooperation with Chinese stakeholders to optimize future market access. Overall, the survey results highlight the tour's effectiveness in achieving its goals, while also identifying areas for minor improvements, particularly in logistics and industry representation.

Below are the key insights:

1. Meeting Expectations for Knowledge & Market Understanding

- Knowledge of Chinese Market:
 - 100% rated the tour as outstanding or exceeded expectations
- Understanding of Future Market Access Credentials:
 - 100% rated it as outstanding or exceeded expectations
- Commercial Trade Opportunities Awareness:
 - 100% found it outstanding or exceeded expectations,

2. Networking & Relationship Building

- Opportunities to Network with Importers/Wholesalers:
 - 100% were very satisfied, or satisfied,

3. Knowledge of Consumer Consumption Growth

- Impact on Understanding Consumer Trends:
 - 100% rated the tour as outstanding or exceeded expectations,

4. Satisfaction with Avocados Australia's Support

- Communication & Staff Assistance:
 - 100% were very satisfied, or satisfied.

5. Effectiveness in Market Intelligence & Commercial Partnerships

- Gathering Market Intelligence for Market Access Strategy:
 - 100% were satisfied or very satisfied.
- Building Commercial Partnerships with Chinese Importers:
 - 100% were very satisfied or satisfied.
- Market Intelligence on Chinese Avocado Market & Supply Chain:
 - 100% were very satisfied or satisfied.

6. Logistics & Industry Representation

- Travel, Accommodation, Hygiene & Food Standards:
 - 88.88 % were very satisfied or satisfied,

7. Future Engagement & Recommendations

- Likelihood to Recommend the Tour:
 - 100% were very likely or likely.
- Likelihood of Participating in Another Tour:
 - 100% were very likely, or likely.
- Support for Ongoing Cooperation with Chinese Stakeholders:
 - 100% of delegates supported continued collaboration.

Conclusion

The study tour was highly successful in enhancing market knowledge, fostering relationships, and gathering intelligence. The majority of participants were very satisfied with the organization, networking opportunities, and market insights. However, there was a small percentage expressing dissatisfaction with certain aspects such as travel arrangements and industry representation. Overall, strong support was evident for continued engagement with Chinese stakeholders.

Delegation evaluation discussion summary – key points from delegates

- delegates were overall satisfied with the opportunities to understand China's avocado market and production industry.
- Delegates were highly encouraged by the sophistication of China's cold supply-chain, warehousing capabilities and ripening infrastructure
- Some delegates felt there was itinerary overload, and possibly having a few evenings of private R&R would be recommended
- Delegates agree the Expos provided growers and exporters confidence there is a large desire for Australian avocados giving hope to family succession
- Consensus to visit more retailers given the large amount of retail diversification
- Delegates agree e-commerce is an enormous and exciting growth channel, i.e., a consumer can order fresh fruit online and have a ripe avocado within 30 minutes. Delegates
- China still has a long way to go in terms of avocado production sophistication, and it's unsure if the Chinese avocado industry can ever expand to a level of Australia given the lack of suitable and available land
- Prior to the tour, delegates did not appreciate just how steep the avocado production terrain. And how dangerous it is to cultivate and harvest
- Delegates were overall very optimistic about future market access given the numerous commercial trade and cooperation agreements signed throughout the project
- Delegates were very interested to explore ways to introduce greenskin varieties to the Australian avocado market access application as this was a variety known to Chinese importers because of the success in the Hong Kong market
- Delegates were awestruck to learn the expansive distribution networks in Western China, i.e., Sichuan Province has an addressable consumer market of 90million with best-in-class cold chain distribution and warehousing.
- Delegates support ongoing industry commitment to develop the China market

Recommendations

The overall feedback from the delegates was highly encouraging and positive. We did have some constructive criticism catered around better inclusiveness and representation of industry. This feedback is important, has been considered, and will be used to assist in improving the curation of future expressions of interest, project engagement and communication, and overall representation of industry.

Key Recommendations -

- Continue with ongoing collaboration with cooperation partners to continue enhancing future market access opportunities
- Formalise R&D activities with key Chinese agricultural stakeholders to deepen industry to industry relations
- Replicate participation in China's trade expos and conferences such as China International Fruit Conference, China International Fruit Expo, China International Import Expo

Referred scientific publications

Not applicable

Intellectual property

No project IP or commercialisation to report

Appendices

Appendix 1

11 November 2024, Beijing, Cooperation Signing Ceremony between AAL and Sinomach. Signatory witnesses; Mr. Mr. Rhett Miller, Trade & Investment Queensland China Commissioner, and Mr. Lu Kun, CFNA Fruit Manager



6 November 2024, Shanghai, AAL and JD.com Cooperation Singing Ceremony during CIIE. Signatory witnesses; Ms. Yu Lu, CFNA Vice President, and Mr. Daniel Gschwind, QLD Trade & Investment Chairman



Appendix 2

China International Fruit Expo, Shanghai, 27-29 August 2024, photo of Study Tour delegates preparing to open the avocado smoothie bar on day 1.

28 August 2024, Shanghai, Peak Industry bodies, Avocados Australia and Summerfruit collaborate for dinner at China International Fruit Expo.



Appendix 3

Symposium with Yunnan Provincial Department of Agriculture & Rural Affairs, and Study Tour delegates avocado farm field trip.

30 August 2024, group photo outside the Yunnan Provincial Department of Agriculture & Rural Affairs after a robust and in depth three-hour technical exchange symposium



31 August 2024, Xishuangbanna, Yunnan Province, Study Tour delegates assessing the quality concerns of the Yunnan Chief Agronomist



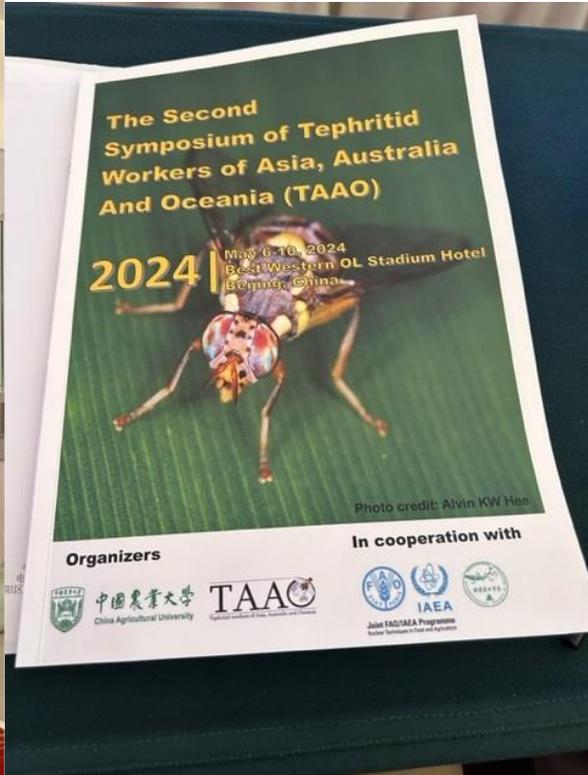
31 August 2024, Xishuangbanna, Yunnan Province, Study Tour delegates assessing the tree health, flowering, and flushing



August 29, 2024, Chinese Supermarket study visit for delegates to assess instore avocado merchandising, price, quality and learn from avocado buyer about supply chain



May 6, 2024, Beijing, The Second Symposium of Tephritid Workers of Asia, Australia, and Oceania (TAAO) - gather knowledge, and intelligence about China's understanding of fruit fly and listen to Peter Leach present FASTA to China



5 September 2024, Beijing, information gathering meeting with China Agricultural Wholesale Markets Association (CAWA)



6 September 2024, Beijing, Avocado technical exchange meeting with, Trade & Investment Queensland, and China Academy of Agricultural Sciences (CAAS).



Appendix 4

Winter Edition 2024, Talking Avocado article about Riverking, a leading Chinese avocado importer inbound mission to Australia for their second visit to inspect Australian avocados and packing sheds

Leading Chinese avocado importer returns to Australia

By Anna Petron, Avocados Australia



Riverking, one of China's leading avocado importers, took part in a trade visit from 25 to 26 June whereby this time they visited the east coast of Australia. Riverking's avocado procurement leaders, Sean Chen (Global Import Director) and Oliver Peng (Senior Manager), met with key stakeholders and some of Queensland's leading avocado growers, packers and exporters in and around Bundaberg. They visited Costa Group, Donovan Avocados and Brooklet Farms. The aim of the visit was to learn about Australia's production practices and further build strategic alliances with stakeholders involved in the Australian avocado industry.

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

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

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

"Avocados Australia is building a strong and enduring relationship with Riverking. AAL met with Riverking's President and executive team at their Shanghai Head Quarters in 2021 and they attended a special Memorandum of Understanding Signing Ceremony between Avocados Australia and the China Entry-Exit Inspection and Quarantine Association in the same year."

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

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

Riverking's visit to Queensland was covered by local and international media, an example is online here: <https://bit.ly/3hag1VK>

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

Appendix 5

22 October 2024, Atherton, Far North Queensland Export Forum – AV23012 Industry Adoption activity report to growers and exporters



Appendix 6

4 December 2024, Tambourine Mountains, Queensland, inbound study mission by large Chinese fruit importer and trader, Sichuan State-Owned Assets Investment & Operations Administration Visiting rootstock nursery, Anderson Horticulture.



Appendix 7

8 November 2024, China International Import Expo, Shanghai. Study Tour delegates promoting Aussie Hass avocados to China's King of Leaders, livestream broadcast to 1 billion people. And Australian exporter brands (The Avolution and Purpleskin/Greenskin Avocados) highlighted in the livestream



Appendix 8

9 November 2024, Cooperation Signing Ceremony between AAL and Joy Wing Mau at CIIE, and the participation of Trade & Investment Queensland, and CFNA.



29 August 20224, Shanghai, Study Tour delegates taking a photo under the large avocado billboard at Shanghai Huizhan Fruit Markets



29 August 2024, Shanghai, meeting with Study Tour delegates and Shanghai Huizhan Fruit Market leaders to agree on AUD\$300million pre-purchase agreement and discussion how to cooperate to secure future commercial trade



9 November 2024, Shanghai, AAL Chair, Matt Kleyn, and Shanghai Huizhan Fruit Market General Manager, Marie Wong, sign the AUD\$300 million pre-purchase agreement at the Shanghai Local Government Economic Convention during CIIE. Trade & Investment Queensland Queensland China Trade Commissioner, Mr. Rhett Miller, Australia Chamber of Commerce China, CEO Mr. Tian Zhang, and the AV23012 Study Tour delegates were witnesses to the signing ceremony.



Appendix 9

Avocados Australia China Study Tour (AV23012) - Trade Delegation & Stakeholder Engagement Report

Executive Summary

The China Study Tour (AV23012) was undertaken to develop new and strengthen existing trade and R&D relationships, explore market opportunities, and enhance stakeholder engagement for the Australian avocado industry. The delegation engaged with key Chinese stakeholders, including importers, distributors, retail chains, and industry regulators, to assess market potential and establish long-term partnerships. This report details the outcomes, achievements, strategic alignments and linkages with AV20004 Avocado Trade Development Project and the Avocado Strategic Investment Plan 2022-26 (SIP), while providing in-depth analysis of market conditions, logistical challenges, and regulatory landscapes.

Objectives of the Visit

- **Market Expansion:** Identify new opportunities for Australian avocados in China, focusing on premium market segments and emerging retail channels.
- **Stakeholder Engagement:** Establish and strengthen relationships with key Chinese importers, retailers, agricultural and R&D institutions, and government bodies.
- **Regulatory Navigation:** Understand China's phytosanitary requirements, and compliance frameworks to facilitate smoother avocado exports.
- **Competitive Analysis:** Assess China's avocado market, including consumer preferences, pricing trends, and competition from other exporting nations.
- **Supply Chain Optimisation:** Explore logistics and distribution models to ensure product freshness,

efficiency, and cost-effectiveness.

Key Outcomes and Achievements

1. Strengthened Trade Relations

- Conducted high-level discussions with key Chinese importers and distributors, leading to commitments for future avocado shipments from Australia (including a AUD\$300m prep-purchase agreement from Shanghai Huizhan Fruit & Vegetable Market).
- Reinforced Australia's position as a premium supplier by highlighting superior quality, food safety standards, and sustainable farming practices.
- Established framework agreements with potential long-term partners for streamlined supply chain integration.

2. Market Insights and Observations

- Retail visits and interviews with industry experts revealed that Chinese consumers are highly receptive to avocados as a health-conscious food choice.
- Identified rapid growth in avocado consumption, particularly in first-tier cities such as Beijing, Shanghai, and Guangzhou, driven by increased awareness of nutritional benefits.
- It has been observed that online retail platforms, such as JD Fresh and Alibaba's Freshippo (Hema), are playing an increasingly dominant role in fresh produce sales, indicating the need for a strong digital marketing strategy.
- Noted that price sensitivity remains a key factor, with a preference for competitively priced avocados sourced from Peru, Kenya, and Chile.
- Recognized a growing trend of ready-to-eat avocados, with packaging innovations such as ripeness indicators being well received by consumers.

3. Stakeholder Engagement and Collaboration

- Held meetings with major supermarket chains, including Ole, Fresh Hippo (Hemma) and Haoguoyuan which expressed interest in diversifying their avocado supply chains to include Australian produce.
- Engaged with leading e-commerce players, discussing potential collaborative campaigns to promote Australian avocados through online retail platforms.
- Participated in roundtable discussions with Chinese trade associations and industry bodies, fostering knowledge exchange and trade facilitation.
- Explored potential partnerships with local wholesalers and cold chain logistics providers to ensure efficient distribution and minimise post-harvest losses.

4. Meeting Summaries and Key Contacts

Importer and Distributor Meetings

- **Shanghai Huizhan Fruit Market** Explored long-term procurement strategies, discussed preferred sizing and packaging formats for the Chinese market.
- **Joy Wing Mau, Riverking and SupaFresh** Discussed post-market access trial shipments and promotional activities, including in-store tastings and awareness campaigns.
- **Cosco** Evaluated storage and transport solutions to maintain avocado quality and reduce spoilage. Cooperated to airfreight 800kgs of fresh Hass avocados under a GACC Special Permit to Shanghai.

Retail and Consumer Insights

- **Sam's Club:** Provided insights into the Chinese avocado consumer profile, highlighting demand for consistency in size, ripeness, and packaging innovations.
- **Freshippo (Hema) & JD Fresh:** Highlighted the role of e-commerce in fresh produce sales, emphasizing the importance of digital engagement, influencer marketing, and logistics efficiencies.
- **Local Wholesale Markets:** Demonstrated varying consumer preferences across different regions, with distinct buying patterns in urban vs. rural areas.

Regulatory Engagement

- **China's General Administration of Customs (GACC):** Discussed phytosanitary compliance for avocado imports.
- **Chinese Trade Associations:** Strengthened industry relationships, exchanging insights on trade policies and market entry strategies.

Alignment with the Avocado Strategic Investment Plan 2022-26 (SIP)

The findings from the China Study Tour align with the Avocado SIP in the following key areas:

- **Market Access & Development:** Uncovered new export opportunities and diversified potential sales channels.
- **Strengthening Industry Capability:** Equipped Australian avocado growers with market intelligence, pricing strategies, and consumer insights.
- **Fostering Partnerships:** Established meaningful collaborations with Chinese stakeholders to support long-term trade development.
- **Improving Supply Chain Efficiency:** explored best practices and routes for cold chain logistics and packaging solutions to maintain customer satisfaction

Challenges and Considerations

- **Regulatory Hurdles:** Import regulations and compliance requirements remain complex, necessitating ongoing engagement with Chinese authorities.
- **Market Competition:** Peru and Chile have well-established market shares, offering lower-cost alternatives that appeal to Chinese price-sensitive consumers. Australian Greenskin varieties are of substantial interest to Chinese importers and wholesalers
- **Consumer Awareness:** Further marketing efforts are needed to differentiate Australian avocados as a premium product.
- **Cold Chain Infrastructure:** Ensuring efficient cold chain logistics remains critical to preventing post-harvest losses and maintaining avocado freshness.
- **Currency Exchange and Tariffs:** Fluctuations in exchange rates and potential trade policy changes could impact export profitability.

Market Access Preparation and Readiness

1. **Develop Targeted Marketing Campaigns:** Increase brand awareness through influencer partnerships, digital advertising, and in-store promotions tailored to Chinese consumers.
2. **Address Regulatory Challenges:** Continue engagement with Chinese authorities to facilitate streamlined import processes and ensure compliance with phytosanitary requirements.

3. **Enhance Logistics Strategies:** Strengthen partnerships with cold chain providers to maintain avocado quality and reduce spoilage rates.
4. **Expand Distribution Networks:** Leverage both traditional retail and e-commerce channels to maximize reach and consumer accessibility.
5. **Monitor Market Trends:** Conduct ongoing research to adapt to evolving consumer preferences, competitive dynamics, and emerging trends in avocado consumption.
6. **Packaging Innovation:** Develop consumer-friendly packaging, including ripeness indicators and eco-friendly materials, to align with market expectations.
7. **Trade Promotion and Education:** Organise trade fairs, cooking demonstrations, and nutritional awareness programs to enhance consumer engagement and demand.

Conclusion

The China Study Tour (AV23012) successfully advanced the Australian avocado industry's presence in China by establishing strong trade and R&D relationships, gaining valuable market insights, and identifying key areas for growth. The actions, activities and outputs of AV23012 are linked with sought outcomes of AV20004 Avocado Trade Development Project and the Avocado Strategic Investment Plan 2022-26 (SIP). Moving forward, a strategic focus on regulatory navigation, logistics efficiencies, and targeted consumer engagement will be critical to achieving sustainable long-term success in the Chinese market. Ongoing collaboration with industry stakeholders, investment in marketing initiatives, and continuous market research will be essential to maintaining Australia's competitive edge in China's rapidly expanding avocado sector.