

CLOSE-UP: AVOCADO

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European apple & pear harvest forecasts

<http://passionfruit.cirad.fr>



Producer country sheet

Avocado in Israel

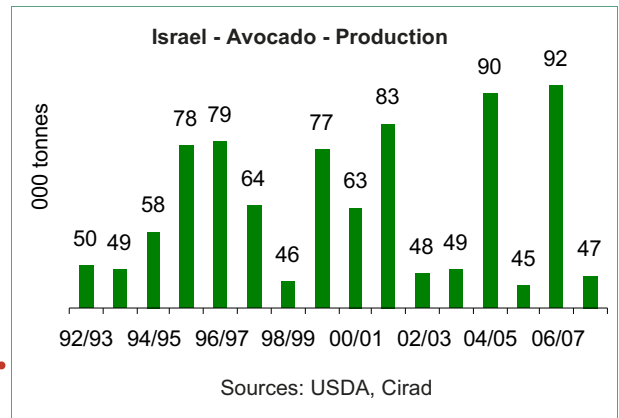
A pioneer and major origin in the Mediterranean area, Israel is among the ten to twelve leading producer countries with production of some 90 000 tonnes—increasing. Export-oriented, it covers a significant proportion of EU market supplies during the winter season and has contributed substantially to making avocado known. Still concentrated in spite of the end of the state monopoly, the export sector historically aimed at the French market is diversifying its outlets (United Kingdom, Eastern Europe, etc.). The domestic market plays a major role.



Production zones

About 70 % of avocado production is in a coastal strip barely 15 km wide running from the north of Tel Aviv to the Lebanese frontier. The plantations north of the town of Acre in western Galilee are along the most reputed. About 20% of the area under avocado is in Upper and Lower Galilee and the Jordan Valley and the remaining 10% is south and east of Tel Aviv. Nearly three-quarters of production is from kibbutzim, co-operative farming organisations. The country has about ten packing stations and two of these alone pack about half of production. Sanitary problems are limited (no *Phytophthora*), in

particular thanks to the climate. Rational farming is therefore very widespread and average yields are high. The availability of irrigation water is one of the main limiting factors and water forms a large proportion of production costs.



Volumes

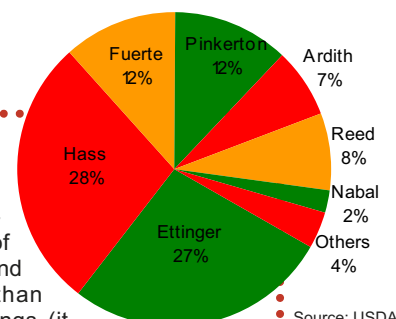
The crop developed rapidly from the end of the 1950s onwards, with plantations culminating at 11 000 ha during the 1980s. The area then halved after a succession of difficult seasons and the setting up of an economic policy that was less favourable for the primary sector. Avocado has been grown on about 4 500 ha since the end of the 1990s and production is about 80 000 to 90 000 t in normal seasons (the Hamsin, a hot wind that sometimes blows from April to June, can cause a strong decrease in production). Frost in January 2008 caused a serious but temporary decrease in the tonnage harvested in 2007-08. The area under avocado has increased again since the mid-2000s (by about 100 ha per year) and yields have also increased. Production will therefore continue to increase but the 2008 frost will slow short-term dynamics. Nevertheless, the harvest should soon reach 100 000 t (with a target of 150 000 t in 2020). The Volcani Center provides considerable research support.

Production calendar and varieties

The season is comparatively long thanks to a broad range of varieties. This has changed considerably. 'Ettinger', a locally bred cultivar, and 'Hass' have developed strongly at the expense of 'Nabal' and 'Fuerte', although the latter is well represented. Emphasis is currently laid on 'Hass' and

Israel — Avocado — Production calendar											
O	N	D	J	F	M	A	M	J	J	A	S
Ettinger											
		Fuerte									
		Hass									
		Pinkerton									
			Nabal								
				Ardith							
					Reed						

Israel - Avocado - Range of varieties



this forms more than 60% of new plantings (it should cover 35% of the total area under avocado in 2010). Among green varieties, 'Pinkerton', and 'Ardith' and 'Arad' to a lesser degree, should develop at the expense of 'Ettinger'.





KEDEM

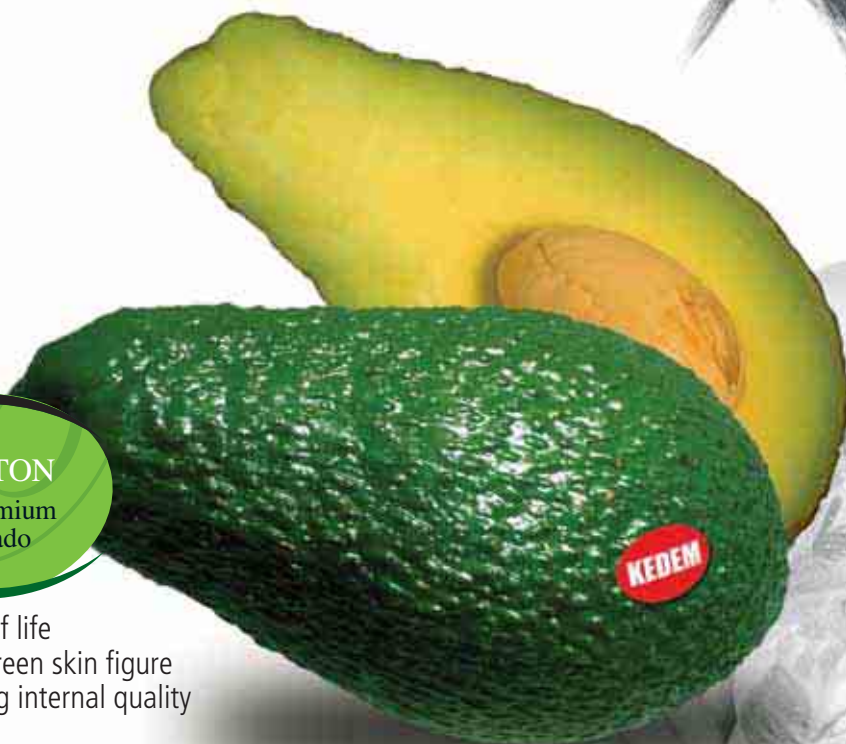
PREMIUM FRUIT AND VEGETABLES
GROWN IN ISRAEL



PINKERTON

Our premium
Avocado

- Longer shelf life
- Beautiful green skin figure
- Outstanding internal quality



Kedem's superior Avocado are grown in the Upper Galilee, where climate conditions are ideal: caressing sun, excellent rich soil and fresh river water. This combination produce healthy trees that yield the highest quality Avocado. Our Avocado growers, equipped with updated know-how based on research, are cultivating the Avocado orchards using the most modern agricultural growing techniques.



Kedem Hadarim offers to its customers a reliable and steady supply of a wide range of premium fruit and vegetables: Avocado, Capsicums, Citrus (all the varieties of top quality "jaffa" citrus), Plums, Peach, Nectarines, Pomegranates, Herbs, Grapes, Dates, Exotics - Persimmon / Sharon Fruit, Mango, Kiwi, Litchi, Kumquat, Limquat, Lime, Carrots, Potatoes, Melons and more.

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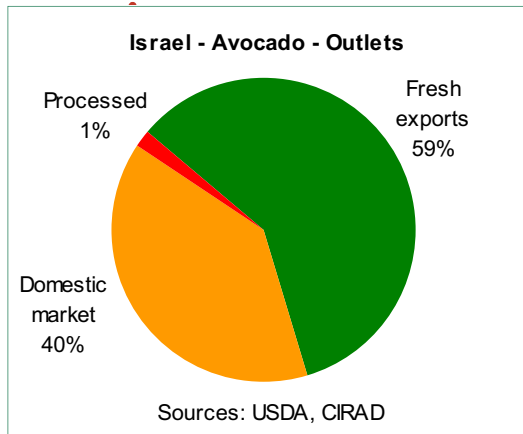
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Outlets

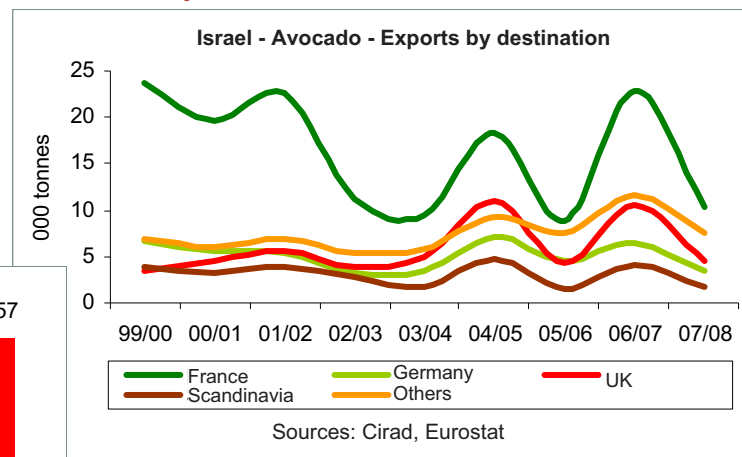
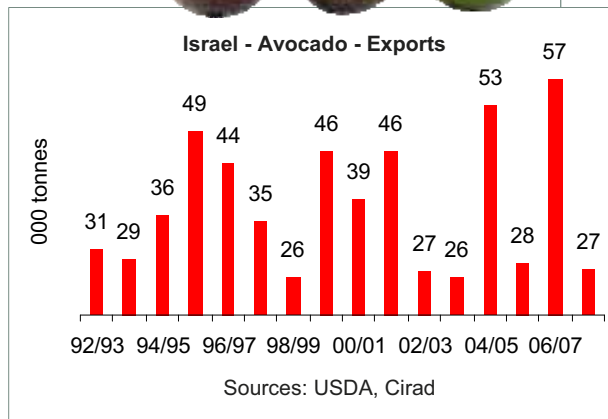
The sector is export-oriented. However, the domestic market plays a key role as it is very profitable even for produce that does not meet export quality standards. Today, the some 6.4 million people who live in Israel purchase about 35 to 40% of the quantity grown. Per capita consumption is therefore among the highest in the world, oscillating between 3 and 5 kg per year according to production volume and prices.

Large fruits are preferred (sizes 10 to 14) especially for 'Ettinger'. The quantities available for processing are therefore very limited. The oil mill has closed and the pulp factory is operating at low output.



Total exports

Exports follow the markedly cyclic production and have increased very slightly since the 1980s recession. Quantities currently vary from 45 000 to 60 000 t in seasons with normal weather conditions. Practically all the fruits exported are shipped to the European Union, where Israel has contributed strongly to making avocado known and developing consumption. France is still the main outlet but its market share has decreased to approximately 40% today. For a number of seasons, exporters have used a diversification strategy based on shipments targeting the expectations of each market as regards size and variety. Shipments of 'Hass' to the United Kingdom have thus increased strongly. Germany and Scandinavia are still key markets for green varieties. Shipments to the eastern EU (especially to Poland) and the former Soviet bloc (Russia and the Ukraine), have development strongly in recent seasons and are now significant. The Agrexco company was the only sector player for a long time and is still the main exporter but today shares the market with the companies Mehadrin, Kedem-Hadarim and Bachan-Development.



Logistics

The goods are carried in refrigerated lorries to the port of Ashdod (and sometimes Haifa). Most sea transport is handled by two modern vessels belonging to the Agrexco company and specially designed for the requirements of fresh produce. General shipping companies operating in the Mediterranean are sometimes called upon in busy months. Practically all the produce is unloaded in Marseilles and then carried by road to the various consumer countries.

Israel — Avocado — Sea freight

Markets	Main shipping lines		Shipping time	Observations
	Port of departure	Port of arrival		
EU	Ashdod	Marseilles	3 days	Vessels specific for the purpose