

2024-2025

LEBTRADE PORTAL A GOLDMINE FOR EXPORTERS

Avocados HS Code: 08044000



Creating Export Opportunities by
MINISTRY OF ECONOMY & TRADE

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1. INTRODUCTION - WHICH MARKETS OFFER MOST OPPORTUNITIES FOR AVOCADOS FROM LEBANON?

Lebanon is gradually strengthening its position in the global avocado export market. The country's avocado exports increased significantly, rising from USD 433,000 in 2021 to USD 8.2 million in 2024, highlighting strong growth trends and considerable untapped potential, as well as opportunities to enter new and promising markets.

Notably, Lebanon holds strong prospects for expanding its market share in both European and Middle Eastern markets.

This report provides an overview of Lebanon's current production and exports of avocados, its position in the international markets, and the opportunities available to further develop the country's export potential, with the overall objective of enhancing the capacity and competitiveness of Lebanese exporters.

2. PRODUCT DEFINITION

Depending on the variety, avocados have green, brown, purplish, or black skin when ripe, and may be pear-shaped, egg-shaped, or spherical. Commercially, the fruits are picked while immature and ripened after harvesting.

Avocados are cultivated in tropical and Mediterranean climates of many countries.

Hass avocados are at the top of the list of products with the most potential in the next few years.

3. WHERE DO LEBANESE AVOCADOS CURRENTLY GO TO?

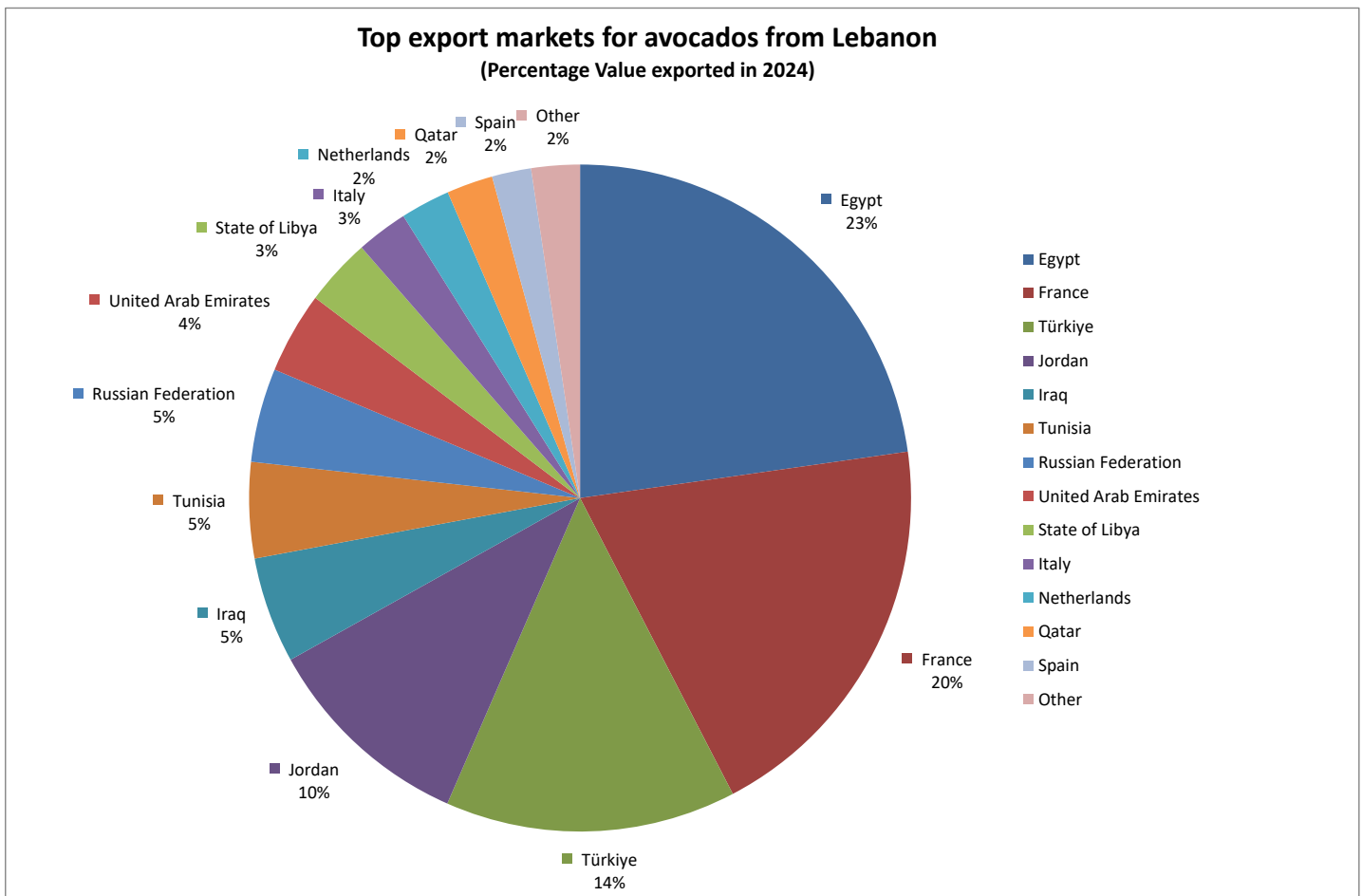


Figure 1. Top export markets for avocados from Lebanon in 2024 - Source: ITC Trade map

As shown in figure 1 above, the top destinations for Lebanese exports of avocados include Egypt, France, Turkey, Jordan, and Iraq.

Figure 1 shows that Lebanon has successfully accessed the European market, with France ranking the second-largest destination for Lebanese exports, while Italy, the Netherlands and Spain account for 7% of total exports.

Egypt, Turkey, Jordan and other Middle Eastern countries are also top destinations for Lebanese avocado exports in 2024.

Research conducted on Lebanese avocado exports some years ago highlighted a strong potential for Lebanon to enter the European market. A comparison with recent data shows that Lebanon has indeed entered this market, with France now ranking as its second-largest export destination. Exports have also expanded to other European countries, indicating significant potential in markets such as the Netherlands, Italy and Spain. Based on these trends, forecasts suggest a more aggressive market entry into these countries in the coming years.

4. WHAT IS LEBANON’S POSITION IN THE INTERNATIONAL MARKET?

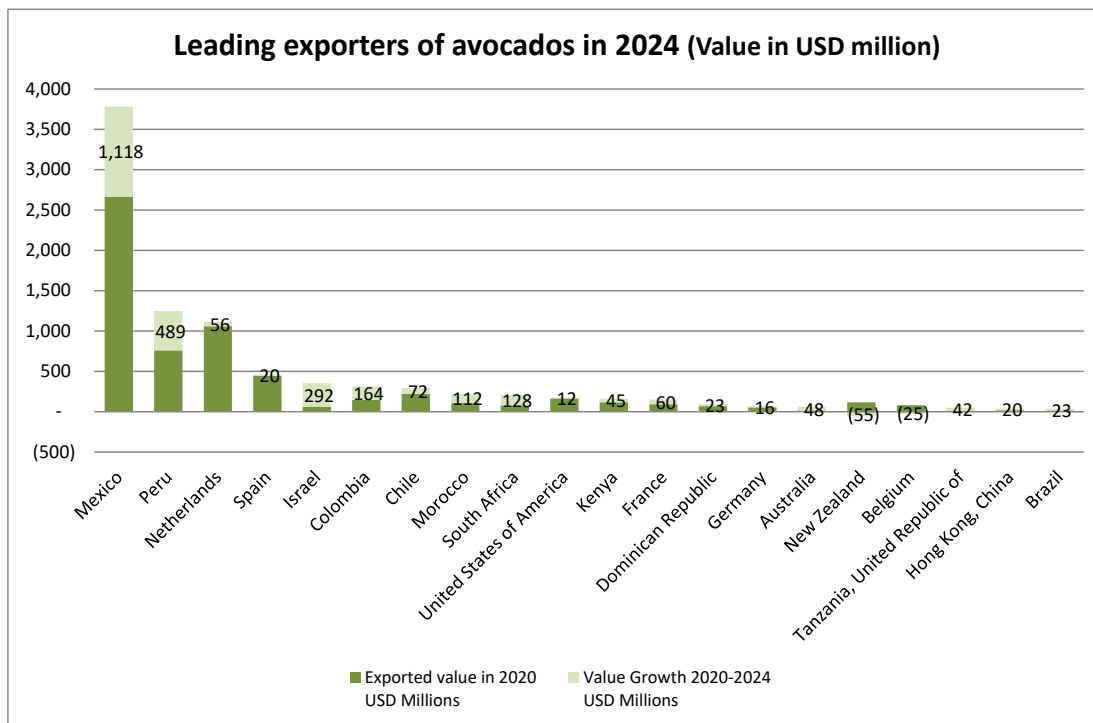


Figure 2. Leading Exporters for Avocados 2024 - Source: ITC Trade map

As shown in figure 2, the largest exporters of avocados worldwide are Mexico, Peru, Netherlands, Spain, and Israel. Within the MENA region, Israel and Morocco are dominant avocado exporters.

Lebanon has maintained steady export values over the last four years, accounting for around 0.1% share in world export and ranking 28th among global exporters. Lebanon is mainly in competition with the other supplying countries from the Middle East and in terms of import tariffs applied worldwide, avocados trade can be considered as a level playing field.

Largest Avocado Producers

By far, the largest producer and exporter of Avocados globally is Mexico, with an export value of USD 3.8 Billion in 2024. Mexico has 3 times the production and exports of its closest rival, Peru. The top two producers account for an estimate of 54% of worldwide production in 2024.

Largest Avocado Producers in the Mediterranean region

The largest three avocado producers in the Mediterranean region are Spain, Israel, and Morocco. Turkey, despite being the top regional producer for most fruit crops, has limited avocado production due to its climate conditions. Lebanon's avocado production is growing rapidly, with data showing 20,300 tons produced in 2023, an estimate of 25,000 tons annually in 2025, and projections to attain 30,000 tons in the upcoming few years.

Table 1. Overview of avocados harvest windows in the world's leading production countries

Country	J	F	M	A	M	J	J	A	S	O	N	D
Peru												
Mexico												
S. Africa												
Israel												
Morocco												
Chile												
Spain												
Lebanon												

Table 2. List of supplying markets for a product imported by the most potential European markets in 2024

Exporters	Import value 2024-M01	Import value 2024-M02	Import value 2024-M03	Import value 2024-M04	Import value 2024-M05	Import value 2024-M06	Import value 2024-M07	Import value 2024-M08	Import value 2024-M09	Import value 2024-M10	Import value 2024-M11	Import value 2024-M12
Importer: Netherlands												
World	108,440	91,500	133,053	200,288	222,711	144,235	177,083	174,438	150,010	156,488	136,914	99,839
Israel	11,501	10,131	10,356	4,436	95	0	0	32	867	2,151	4,333	4,654
Morocco	13,179	14,477	3,298	0	0	0	0	0	738	1,552	17,787	8,380
Peru	3,244	7,939	49,100	84,452	102,101	77,868	105,860	98,837	79,326	19,013	1,506	817
Importer: Germany												
World	56,505	54,067	54,775	50,464	50,210	49,584	47,782	46,338	45,959	50,337	51,811	46,472
Israel	10,622	11,906	15,856	13,795	3,903	277	138	144	119	1,012	6,844	8,106
Morocco	11,754	11,285	6,972	1,173	124	103	117	110	117	131	9,485	9,016
Peru	1,337	2,880	6,060	11,294	15,910	17,547	24,791	25,257	27,791	18,040	2,598	1,243
Importer: France												
World	70,093	57,724	67,802	62,655	46,708	48,105	53,474	50,284	62,250	56,962	64,514	55,565
Israel	24,977	17,816	25,574	21,478	1,686	48	97	535	3,778	11,078	11,662	16,634
Morocco	12,136	9,863	8,228	613	100	132	10	0	370	830	18,003	11,711
Peru	2,619	1,962	7,019	17,680	23,434	25,396	30,169	28,705	39,423	23,423	8,299	4,533
Importer: Italy												
World	11,975	10,780	12,859	13,839	14,805	13,655	15,947	16,944	18,869	13,528	18,431	13,232
Israel	2,775	1,853	3,078	1,428	333	0	0	0	2,122	2,023	2,222	2,289
Morocco	165	0	0	0	0	0	0	0	64	59	1,228	824
Peru	0	0	870	1,866	3,591	3,359	6,861	5,754	5,323	527	0	0

In table 1, the darker blue means it is a peak harvest month, whereas the clearer blue shows a slower harvest time.

The main avocado harvest window in Lebanon runs from December through May, with some early varieties starting in late autumn and others extending into July. The peak season allows for consistent supply to both local and export markets, particularly during the winter months. In the regional competitive countries, Morocco and Israel have somewhat similar harvest windows, therefore representing a high regional competition for Lebanese avocados exports.

Furthermore, if we analyze the import of avocados in the top importers EU countries, in Table 2 we can spot a decrease in import from Morocco and Israel starting May. This creates a window for the late Lebanese avocados varieties (such as Lamb Hass and Reed) with harvest extending into June and July.

5. WHAT ARE THE LATEST TRENDS IN TRADE?

5.1 WHAT ARE THE TRENDS IN THE 20 LARGEST IMPORTING COUNTRIES?

The world total import value of avocados has significantly increased since the year 2020, reaching almost USD 10.2 billion in 2024. As the figure below shows, the United States is by far the largest importer in the world and its import value increased by 52.6% between 2020 and 2024. Netherlands is also a prominent avocado importer internationally. It is known for being a hub for avocados in Europe; it imports avocados then export them.

The European region is the second largest importing market of avocados after the US. The main importers in the EU are Netherlands, France, Spain, Germany and UK, which show just how much Europe is a potential market for Lebanon.

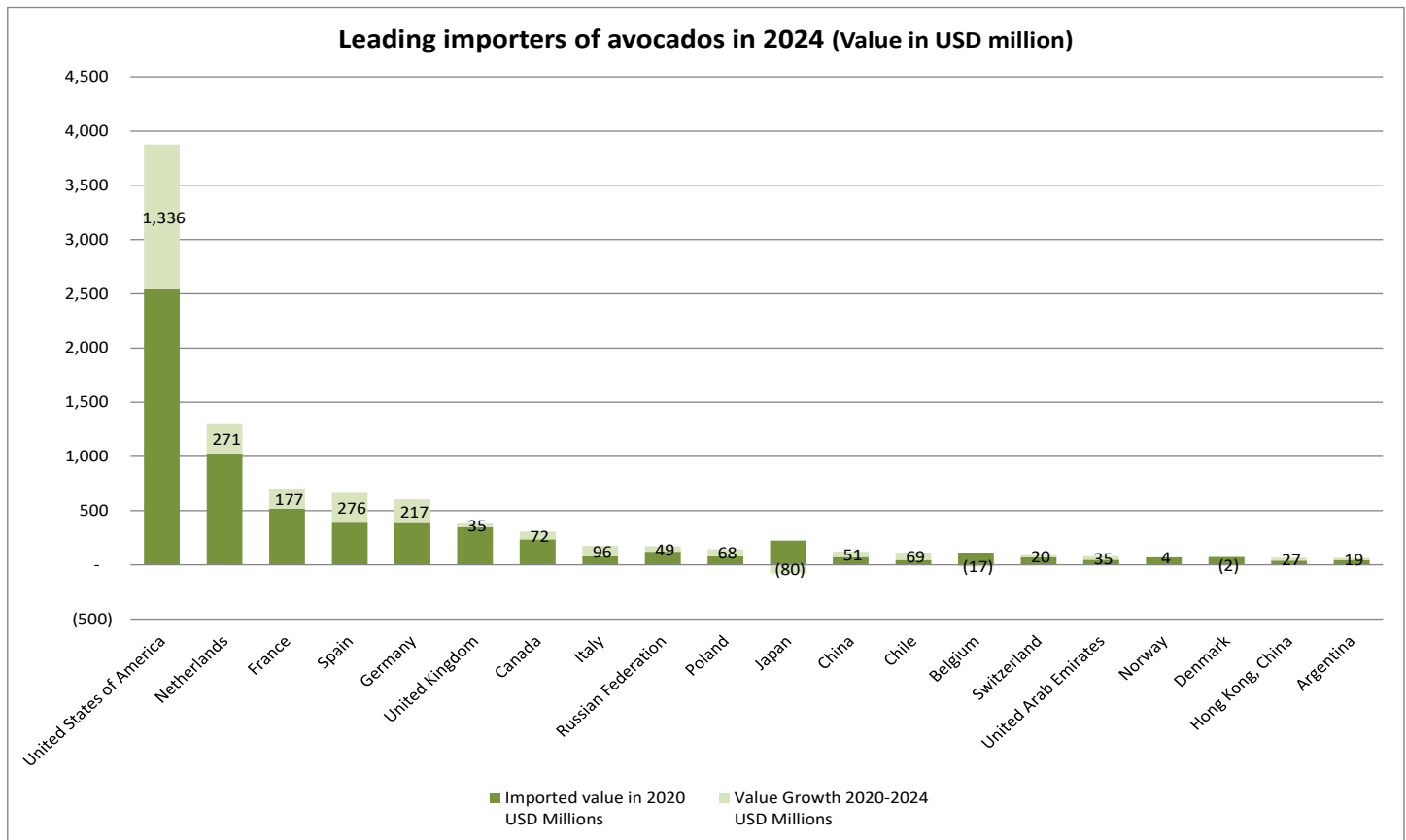


Figure 3. Leading importers for avocados in 2024 - Source: ITC Trade map

As for the Asian market, The Russian Federation is the main importer of avocado, followed by Japan and China.

Interestingly, the per capita import statistics of 2024 (as shown in Fig. 4 below); show that Spain, Norway, Denmark, United States, and France topped in avocado consumption. It also shows that there is still a huge potential for growth in countries with lower per capita like UAE, Germany, UK, and Italy.

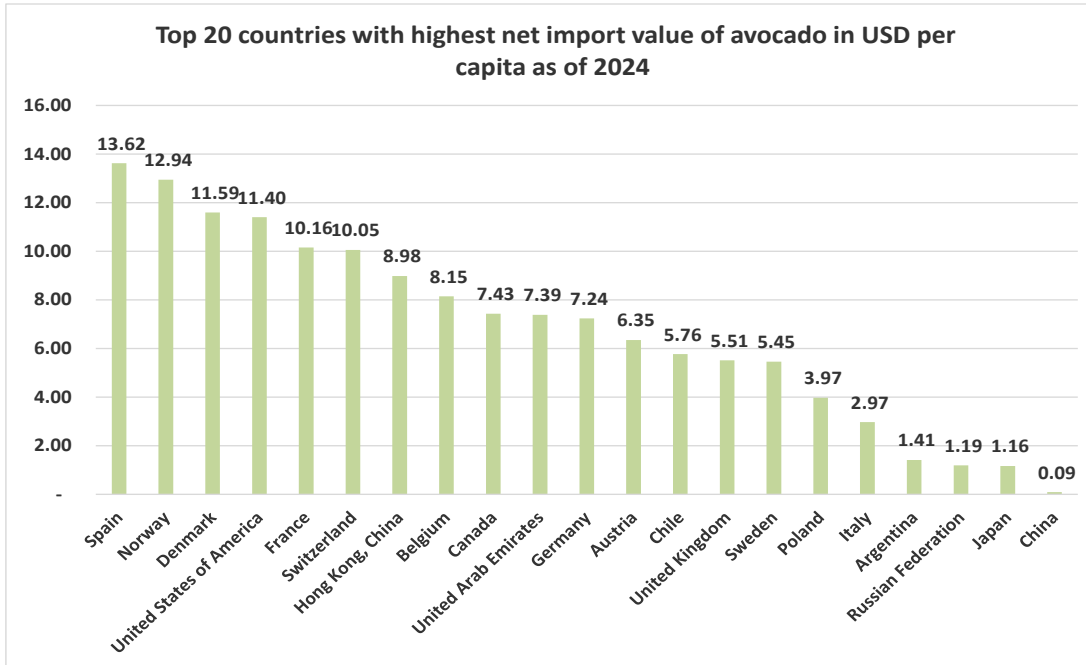


Figure 4. Top 20 countries with highest net import value of avocado in USD per capita in 2024 - Source: ITC Trade map

Avocado is a promising product. According to stat ranker, the global avocado market is expected to continue to grow, with projections of a USD 20 billion market by 2030. Besides, the price of avocados is constantly increasing, and is expected to stay high. It is estimated that the per capita consumption of avocados will grow even further in the next coming years, with a huge potential for growth in the European markets, especially Germany and Italy, which are already starting to increase their avocado imports. Experts assume that it is still possible that import volumes will double, provided the market attains supply chain and price stability.

5.2 WHAT ARE THE TRENDS IN TRADE IN THE EUROPEAN MARKET?

According to the CBI study, The European market potential for avocados continues to expand. In 2024, Europe imported around 963,000 tons of avocados from non-European origins, confirming the region’s strong and growing demand.

However, growth across Europe is becoming more uneven. France and the Scandinavian countries are considered relatively mature markets, while Germany, Italy and parts of Eastern Europe continue to offer stronger growth opportunities. At the same time, the market is becoming more competitive and more volatile, particularly during peak supply periods such as the Peruvian season, when larger volumes can put downward pressure on prices.

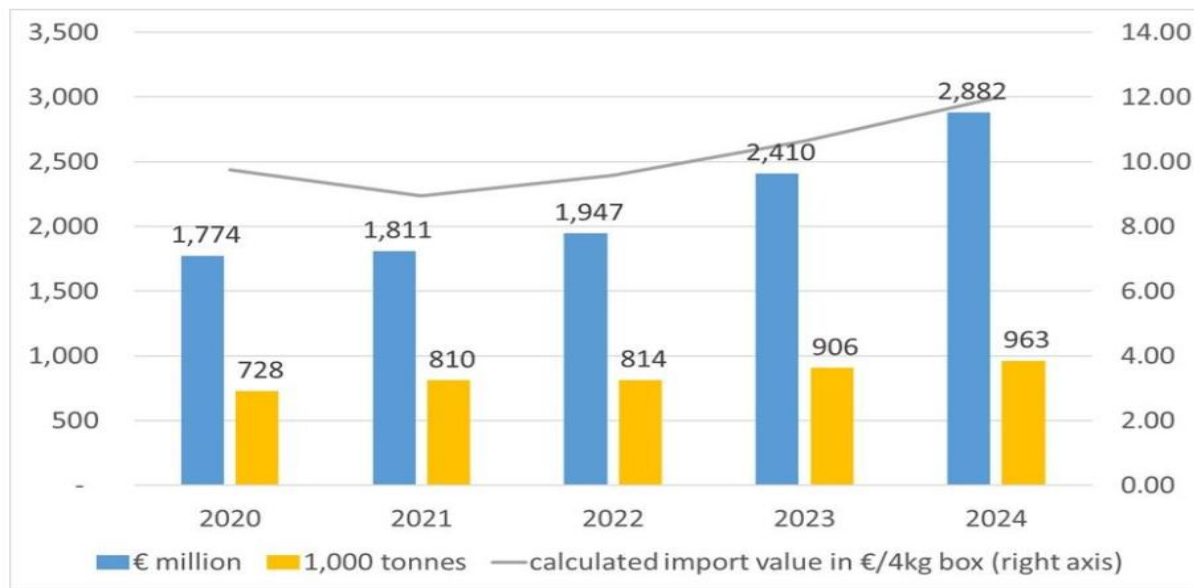


Figure 5. European import (EU-27 + UK + EFTA) of avocados with non-European origin
Source: CBI, *The European market potential for avocados*

Country	Total imported quantity (tonnes)	Unit value (USD/unit)	Annual quantity 2020-2024	Share of world imports	Average distance of supplying countries (km)
Netherlands	386,533	3,408	2%	12.9%	8,110
France	202,218	3,443	4%	6.8%	5,636
Germany	185,056	3,693	11%	6.7%	7,398
Spain	260,420	2,555	8%	6.5%	7,443
United Kingdom	134,296	2,841	3%	3.7%	7,701
Italy	58,350	2,996	19%	1.7%	3,660
Poland	46,195	3,143	17%	1.4%	5,443

Figure 6. Details and development of the main European avocado markets in 2024
Source: CBI, *The European market potential for avocados*

Another important trend is the growing importance of retail programmes, ripening and consistent quality. As a result, exporters must compete not only on volume, but also on reliability, compliance and product performance in order to remain competitive in the European market. For more information, see the full CBI study: [The European market potential for avocados | CBI](#).

5.3 WHAT ARE THE TRENDS IN TRADE IN THE MIDDLE EASTERN MARKET?

The Middle Eastern avocado market is not to be compared with the ones in North America and Europe. Still, this smaller market has experienced an increase in demand between the years 2020 and 2024.

Lebanon mainly exports its avocados to Egypt, Turkey, Jordan and Iraq. In the GCC market, Lebanon mainly exports to UAE and Qatar.

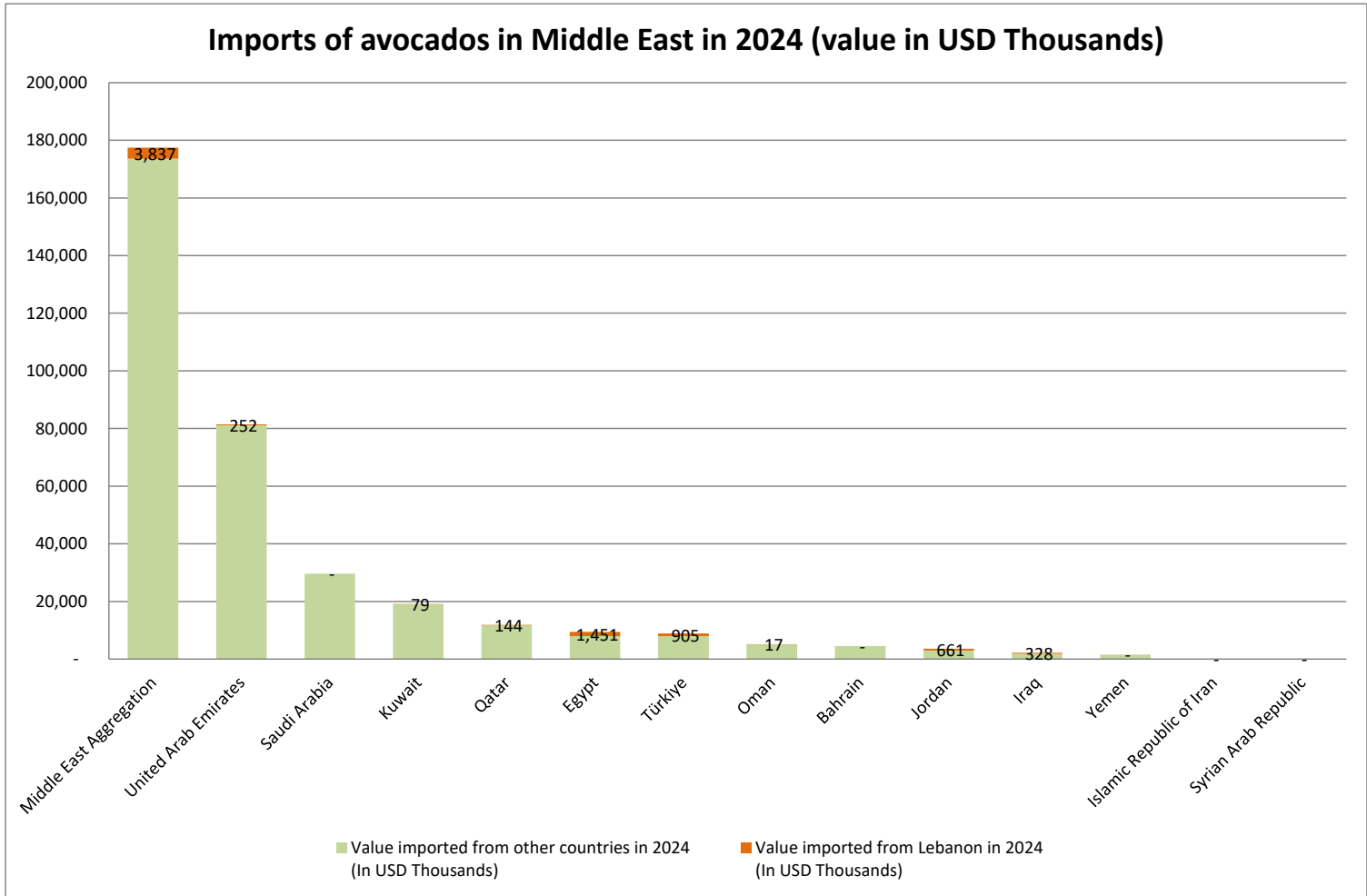


Figure 7. Imports of avocados in Middle East in 2024 - Source: ITC Trade map

In terms of per capita consumption, the UAE stands out with more than twice the consumption of other countries such as Qatar, Kuwait, and Bahrain. The Figure 8 below shows there is still a lot of growth possible in most of the GCC market countries.

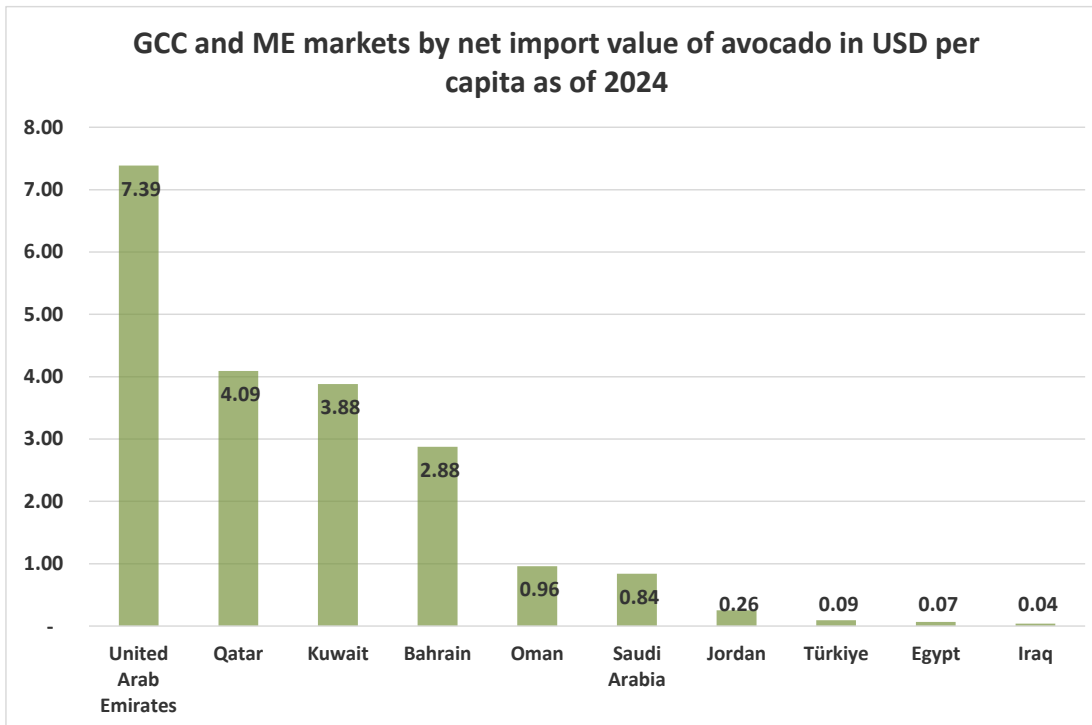


Figure 8. GCC and ME imports of avocados in USD per capita as of 2024 - Source: ITC Trade map

6. WHAT ARE INTERESTING MARKETS FOR THE FUTURE?

For the purpose of identifying potential markets for Lebanese exports of avocados, a model was developed to include indicators such as worldwide imports, exports and export growth from Lebanon, a comparison between tariffs facing Lebanon and leading competitors in the market, average distance of suppliers, concentration of suppliers, import trade windows, Import value of avocado in USD per capita, and other relevant factors.

Existing studies from years prior to 2022 show that these countries were potential markets for Lebanon several years ago, the numbers below show that Lebanon succeeded in entering these markets.

Based on the calculation and analysis in table 3, 6 countries in Europe were identified as promising and offering great opportunities for Lebanese exporters of avocados. These countries include Netherlands, Germany, France, Spain, United Kingdom and Italy. All of these countries are growing their avocado imports, with a Import value of avocado in USD per capita good enough. In addition, all of them do import from different countries, not necessarily neighboring countries, which makes Lebanon a great option.

Table 3 below provides an overview of these potential export markets including the main used indicators.

Table 3. Top 6 European potential markets for Lebanese avocados

Country	Import value 2024 (USD Thousands)	Annual growth '23-'24 (%)	Value imported from Leb 2024 (USD Thousands)	Average distance of suppliers (Km) ¹	Concentration of suppliers ²	Import value of avocado in USD per capita ³	Tariffs (%)
Netherlands	1,298,500	12%	154	8,065	0.16	Very high	0%
Germany	604,304	14%	NA	7,326	0.12	Medium	0%
France	696,193	17%	1,248	5,636	0.18	High	0%
Spain	665,253	19%	122	7,443	0.34	High	0%
UK	381,557	33%	NA	7,701	0.17	Medium	0%
Italy	174,836	25%	160	3,660	0.16	Low	0%

As for the markets in the Middle East and North Africa, including GCC, five countries were identified as potential markets for growth as seen in table 4. Here, the countries, Egypt, Turkey, UAE and Kuwait all already import avocado's from Lebanon. Based on the analysis of indicators listed in the table, these countries will offer potential for more supply of Lebanese avocado's in the years to come.

Table 4. Top potential (existing) export markets for avocados from Lebanon

Country	Import value 2024 (USD Thousands)	Annual growth '23-'24 (%)	Value imported from Leb 2024 (USD Thousands)	Average distance of suppliers (Km) ¹	Concentration of suppliers ²	Import value of avocado in USD per capita ³	Tariffs (%)
Egypt	7,974	-18%	1,451	2,247	0.5	Low	0%
Turkey	7,968	-19%	905	6,187	0.32	Low	45%
Saudi Arabia	29,652	13%	NA	5,284	0.28	Low	0%
UAE	81,156	23%	252	7,494	0.23	Medium	0%
Kuwait	19,005	14%	79	10,671	0.35	Low	0%

¹ The average distance of supplier's measures how far an importing country sources its avocados. Higher values indicate that imports originate from more distant countries, while lower values suggest that imports are sourced mainly from neighboring countries.

² The concentration of suppliers is an index ranging between 0 and 1. Values closer to 0 indicate a diversified supplier base, with imports sourced from multiple countries, while values closer to 1 indicate a high concentration, meaning imports are sourced from a small number of countries (typically two or three).

³ The ratio of imports of avocados in USD value and the population of each country.

The results of the model are also consistent with the CBI study, The European market potential for avocados. In 2024, the Netherlands imported 386,533 tons of avocados, with an average unit value of USD 3,408 per ton, confirming its role as the main European trade hub. Spain imported 260,420 tons at an average unit value of USD 2,555 per ton, reflecting its growing importance as both a destination market and a redistribution hub. France imported 202,218 tons with a unit value of USD 3,443 per ton, showing the strength of its high-quality destination market, while Germany imported 185,056 tons at USD 3,693 per ton, underlining both its market size and relatively high value. These figures support the identification of the Netherlands, Germany, France and Spain as the main European potential markets for Lebanese avocados.

For more information, see the full CBI study: [The European market potential for avocados | CBI](#).

7. INTERPRETATION AND TIPS

- Past studies suggested that Lebanon could enter the European market due to its potential for avocado exports. Today, this study confirms this view and shows that Lebanon has already entered several European markets, with even greater potential for the future, given the continued growth of the avocado market in Europe.
- Given that Europe is a large and growing market for avocados, Lebanon has a great opportunity to increase its market share in this region. With the Netherlands being the hub for Avocados in Europe, enhancing linkages between Lebanese exporters and distributors in Netherlands is a recommended distribution strategy.
- Israel and Morocco are Lebanon's main regional competitors due to their similar climatic conditions and geographical location. As shown in Table 2, European imports from these two countries are almost zero during the June–August period, which gives Lebanon a competitive advantage. By focusing on a later harvest, Lebanon can target exports during these months, as this represents an open market window.
- ITC export potential map confirms our choices of Spain, France, and Egypt as promising markets since the data show how much unrealized potential they have for avocado imports.
- Israel has significantly expanded its avocado production in recent years by increasing planted acreage, adopting advanced irrigation and cultivation technologies, and investing in research to produce healthier and higher-yield seedlings. This has enabled record-breaking harvests and strong export performance. It also suggests that Lebanon should also adopt smarter farming practices and strategic market planning to increase its exports year-round, including outside the traditional harvest months.
- In the GCC; the UAE, Kuwait, and Qatar are the largest avocado importers, where Lebanon has a limited market share. UAE imports most of its avocados from Kenya and Mexico. Therefore, Lebanon should focus on exporting during the months when Kenya is not harvesting, particularly from October to February, which corresponds to Lebanon's harvest window, in order to supply the UAE market.
- In the GCC, the UAE and Saudi Arabia are relatively large importers where Lebanon has limited market share. Low-priced, non-commercial "green" Kenyan avocados dominate these markets. For Lebanon to capture market share from Kenya, it would have to take advantage of Kenyan supply shortfalls between October and February, or increase demand for the higher quality avocados from Lebanon.
- Leverage Sustainability Branding: European and GCC consumers are increasingly conscious of sustainability and traceability. Highlighting eco-friendly farming practices, reduced pesticide use, and fair-trade certifications can give Lebanese avocados a premium positioning compared to low-cost suppliers.
- Develop Stronger Branding and Marketing: Establishing a "Lebanese Avocado" label backed by quality standards can help build recognition, especially in premium European supermarket chains that value origin branding.
- Promote Differentiation through Varieties: Lebanon could expand its presence by promoting niche avocado varieties with unique taste or texture that distinguish it from mass suppliers like Kenya, Mexico, and Peru.
- Lebanon has the potential to enlarge its markets in both Europe and the Middle East. Lebanon can start working on new methods like later harvest to compete with other exporting countries.
- UAE is a market with high potential for Lebanon. It imports most of its avocado from countries that only supply in non-harvest season of Lebanon. During the harvesting season in Lebanon, it imports from Mexico, whose supply has been decreasing annually. Neither Israel nor Morocco has tapped this market properly despite its great potential. Most of its suppliers are from Latin America and Africa, most of which harvesting seasons are opposite to the Lebanese one.
- Spain and France are a rising hub and could replace the Netherlands for Lebanese product if need be. Spain has an increasing local demand and European demand that is mostly covered by Peru/Latin America or Spanish/Moroccan avocado. Israel does not compete in the Spanish market a lot, which is why Lebanese should take it as a promising hub that complements supply in Q4 where only Moroccans really cover.