

HASS  
AVOCADO  
BOARD



2018

## Country Profile: Israel

Producer country profile produced by CIRAD, *The Centre De Cooperation International En Recherche Agronomique Pour Le Développement.*

## Producer country file

# The avocado in Israel

by Eric Imbert

**A pioneering and predominant Mediterranean origin, Israel is among the top twelve producer countries, with an average harvest of 100 000 t and still growing, still largely composed of green varieties. Focused on exports, this country provides a significant part of the supply to the Community market during the winter campaign, and has played a big part in raising the product's profile. The cultivation area is still seeing considerable growth, in particular for Hass.**



© Udi Gafni

# Avocado – Israel

## Location

The majority of the Israeli's cultivation area's 9 200 hectares is situated on a coastal strip approximately 25 km wide extending from Tel Aviv to the Lebanese border. This region where Hass is very well-established has a hot Mediterranean climate. There are two distinct major centres separated by Mount Carmel. To the south, the Sharon Plain, extending from north of Tel Aviv to Mount Carmel, packs in approximately just over one quarter of production. In the north, western Galilee also produces just over a quarter of the national harvest, in a zone reputed for the quality of its fruits which extends from the city of Acre to the Lebanese border. The country's second major production centre is situated in the north-eastern valleys (Upper Galilee, Jordan Valley). These zones, rather specialised in green varieties, account for approximately 20 % of national production on their own. The rest of the cultivation area is packed into the north-west of the Negev, a more recent development zone with a hotter climate (semi-arid). This production centre, rather specialised in Hass, is exhibiting a development trend since it has larger land reserves than the rest of the country.



Processing and graphics: Criad-Fruitrop

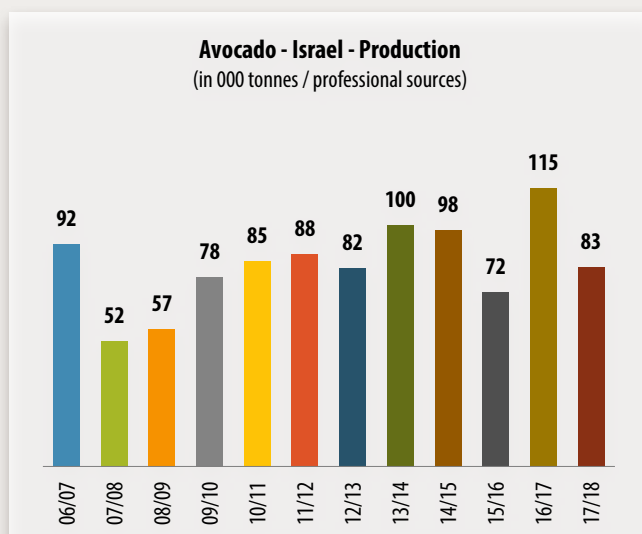
# Avocado – Israel

## Production

The crop developed rapidly from the late 1950s, with planting culminating at 11 000 ha during the 1980s. Thereafter, surface areas gradually halved, after a succession of difficult campaigns and the implementation of an economic policy less favourable for the primary sector. The cultivation area, which covered no more than 4 000 ha in the early 2000s, rallied to reach approximately 9 200 ha. It is growing at a rate of approximately 450 to 650 ha per year, limited by the production capacity of the nurseries and by the availability of agricultural land in the traditional production centres. The growing harvest has fluctuated between 85 000 and 115 000 t in recent seasons (approximately 30 to 35 % Hass and 65 to 70 % green varieties). There can also be high production variations from year to year, often due to the Hamsin, a hot wind that blows sometimes between April and June. The dry climate helps limit sanitary problems (no *Phytophthora* in particular). Hence, rational agricultural is very widespread. Average yield levels are good (approximately 15 t/ha for Hass and 20 to 25 t/ha for green varieties) thanks to a high farm technology level (cutting-edge irrigation systems based 90 % on micro-irrigation, recent high-density planting, etc.). The availability, quality and cost of irrigation water, still highly problematic in the early 2000s, has distinctly improved in most zones thanks to massive use of recycling, and to a lesser degree desalination (approximately 90 % of requirements covered by recycled water). Water requirements are greater in the eastern valleys than on the coastal strip. Nearly three-quarters of production originates from kibbutzes or Moshavs, kinds of agricultural cooperative. The country has a dozen nurseries with a significant production of avocado plants (five of which are large-scale). Their total production is estimated at approximately 500 000 to 600 000 plants/year. The Volcani Center and the Fruit Board provide the industry with scientific and technical support.



Photos © Eitan Zvi



# Avocado – Israel

## Production calendar and varieties

The season is relatively long thanks to the wide varietal range, which has seen major changes. The emphasis is currently being placed on Hass and “Hass like”, which represent just over 50 % of total surface areas and a large part of new plantations. Nonetheless, producers are not abandoning the green varieties, easier to handle, with a much higher yield and highly lucrative on the local market (especially Reed). Pinkerton and Ettinger remain the two predominant varieties (respectively 12 and 18 % of total surface areas). Fuerte has lost momentum, now representing just 3 % of surface areas, while Reed has grown (8 %). The rest of the range is composed of Ardith, Arad, Nabal and Fino. The Volcani Center is developing a research programme into new varieties: “Hass like” such as Naor and Lavi, recently patented, early green varieties (Galill) or late varieties (Moti).

Avocado – Israel – Production calendar

S	O	N	D	J	F	M	A	M	J
	Ettinger								
		Fuerte							
		Hass							
		Pinkerton							
				Nabal					
					Ardith				
						Reed			

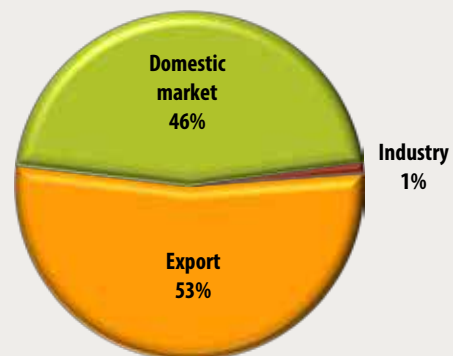


## Outlets

The industry is focused on exports. However, the local market, which consumes practically exclusively green varieties, plays a key role since it is proving highly lucrative, even for merchandise without sufficient quality standards for export. Israel's 8.5 million or so population is currently consuming growing volumes, representing 45 to 50 % of the harvest. Hence, consumption per capita figures among the world's highest, fluctuating between 5.5 and 6 kg/year, depending on the production level and price. The big fruits (calibres 10 to 14) are the most prized, especially for the Pinkerton and Reed varieties. Hence volumes available for processing are highly limited.

Avocado - Israel - Outlets

(professional sources)



# Avocado – Israel

## Exports

Exports, which follow the sometimes pronounced cyclical pattern of production, are up slightly from the beginning of the decade. Volumes are currently fluctuating between 55 000 and 65 000 t across all destinations during a campaign with normal climate conditions (35 to 40 % Hass). Approximately 80 to 85 % of volumes are still aimed at the European Union, where Israel has played in a big part in raising the avocado's profile and increasing its consumption. The freshness of Israeli fruits, due to a limited transport time to Europe, is a major asset. The country's two main markets are France and the United Kingdom, where the Israeli Hass has seen big growth in recent seasons. The Benelux, Scandinavian and German markets come next in the ranking. East European countries, whether the intra or extra-Community, have become major destinations for green varieties, which have an increasingly narrow outlet in Western Europe. Hence Russia currently takes in 15 to 20 % of total exports. The country has a good dozen packing stations. The two main ones, Granot (situated near Hedera to the north of Tel Aviv) and Milopri (situated in western Galilee near Acre), pack approximately half of production on their own. Liberalised since the end of the State monopoly held by Agrexco until 1993, exports are now in the hands of a dozen private companies. Nonetheless, the two main ones, Mehadrin and Galilee, represent 90 % of volumes on their own.



Pinkerton

## Logistics

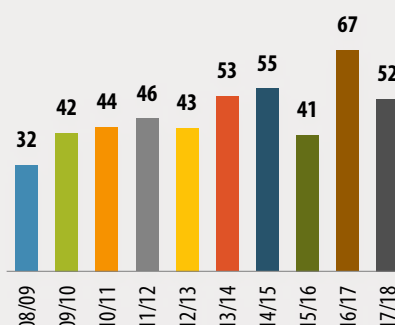
The merchandise, loaded in reefer containers, are taken by refrigerated lorries to the port of Ashdod or Haifa. They are then shipped via generalist shipping lines serving the Mediterranean. France (Fos-sur-Mer) is served in 5 days, the United Kingdom (Felixstowe) in 12 days and the Netherlands (Rotterdam) in 13 days. Three European ports are used as transit points: Marseille/Fos to serve a large part of West European markets (especially at the beginning and end of the season when export volumes are limited), Rotterdam to serve Eastern Europe and to a lesser degree, Koper (Slovenia) to serve both Eastern and Western Europe.

### Avocado – Israel – Sea freight

Market	Main lines		Transit time	Observations
	Port of departure	Port of arrival		
EU	Ashdod Haifa	Fos sur Mer	5 days	Non-specialized lines
		Felixstowe	10 days	

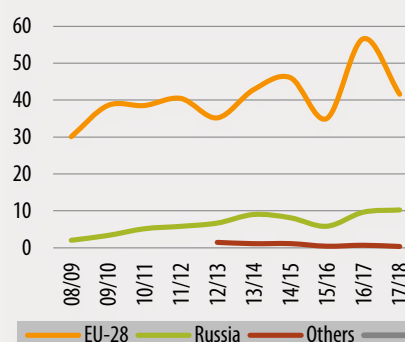
### Avocado - Israel - Exports

(in 000 tonnes / sources: Eurostat, Trademap)



### Avocado - Israel - Exports by destination

(in 000 tonnes / sources: Eurostat, Trademap)



### Avocado – Israel – Main operators

Operators	Market shares
Mehadrin	45 %
Galilée	45 %
Others	10 %

Professional sources