USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** November 05, 2026

Report Number: TZ2026-0006

Report Name: Avocado Sector

Country: Tanzania

Post: Dar Es Salaam

Report Category: Avocado

Prepared By: Benjamin Mtaki

Approved By: Damian Ferrese

Report Highlights:

FAS Dar es Salaam projects a significant expansion in Tanzania's avocado industry, with production expected to increase by 25 percent from 200,000 metric tons (MT) in calendar year 2025 to 250,000 MT by the end of 2026, driven by expanded harvested area and maturing orchards. Export volumes to markets like the EU and India are also forecast to grow by 13.6 percent to 40,000 MT in 2026 from 35,208 in calendar year 2025, supported by higher output and sustained global demand.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Executive Summary

FAS Dar es Salaam forecasts robust growth in Tanzania's avocado sector, projecting production to rise by 25 percent from 200,000 MT in calendar year (CY) 2025 to 250,000 MT in CY 2026 due to expanded harvested area and improved orchard maturity. Avocado exports are expected to increase by 13.6 percent to 40,000 MT in CY 2026 from 35,208 MT in CY 2025, supported by higher production and strong international demand. This performance underscores Tanzania's emerging role as a regional supplier in the global avocado market and highlights ongoing opportunities to improve supply-chain efficiency and competitiveness.

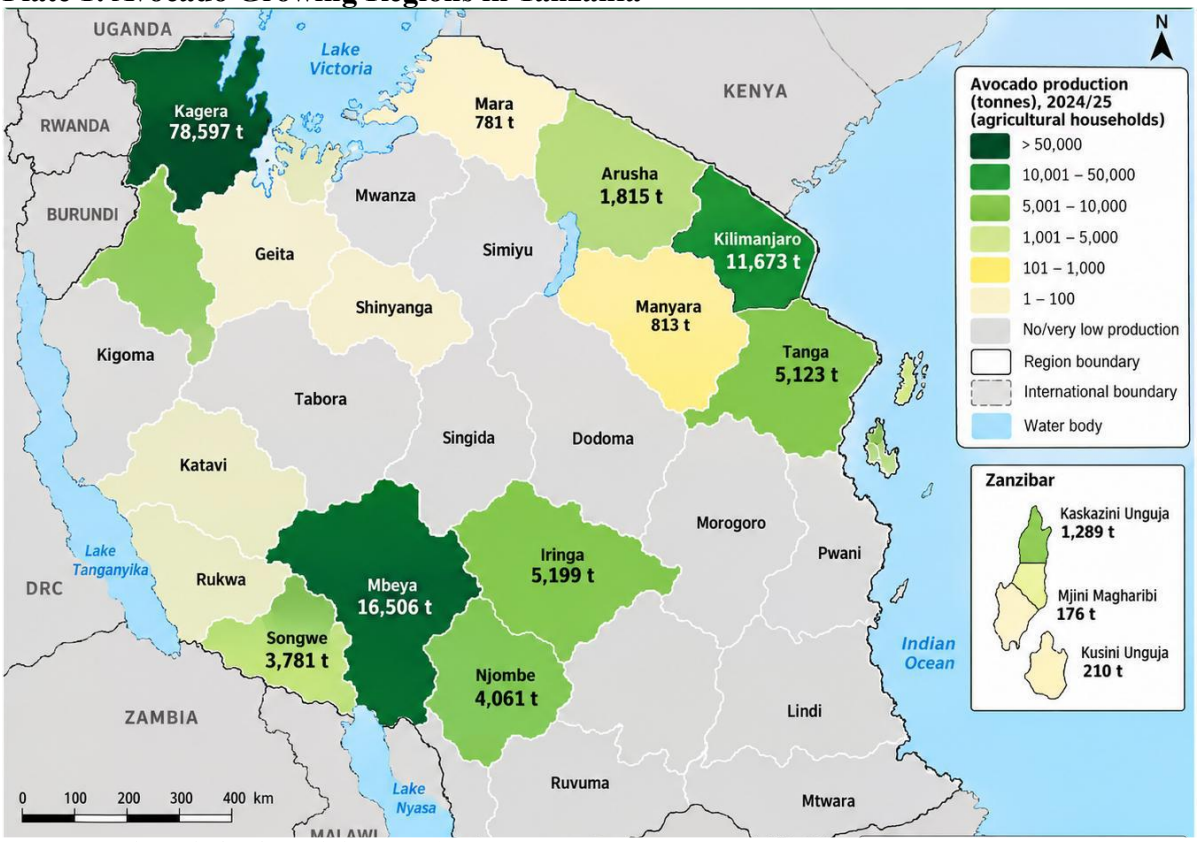
Despite this outlook, the sector still faces constraints typical of a growing horticultural industry. Key challenges include limited cold-chain infrastructure, inconsistent product quality associated with smallholder-dominated production systems, and seasonal logistical pressures that require a shift from cost-effective sea freight to more expensive air freight. Policy and trade-related issues—such as the need to strengthen phytosanitary compliance, improve export certification processes, and enhance regulatory coordination—continue to affect export reliability. Addressing these constraints through improved post-harvest handling, expanded cold-chain capacity, producer training, and traceability systems will be critical to sustaining long-term growth in the sector.

Production

FAS Dar es Salaam forecasts Tanzania's avocado production to rise by 25 percent, from 200,000 MT in CY 2025 to 250,000 MT in CY 2026, driven by expanded harvested area and improved orchard maturation. The sector is predominantly smallholder-based, with small-scale farmers supplying approximately 90 percent of national output. An estimated 3,000 to 4,000 hectares are under cultivation, roughly half managed by more than 10,000 smallholders, while large-scale estates account for the remaining area. Despite favorable growth prospects, structural challenges in post-harvest handling, logistics, and market absorption continue to limit long-term expansion potential.

Avocado production occurs primarily in mid- and high-altitude zones with temperatures between 10°C and 23°C, elevations of 600–3,000 meters, and annual rainfall of 600–1,600 millimeters. Major producing regions include Arusha, Kilimanjaro, Mbeya, Songwe, and Njombe, with additional production from Kagera, Kigoma, Rukwa, Tanga, Manyara, and Ruvuma, where the Ministry of Agriculture is working to strengthen infrastructure and expand access to export markets. Approximately 50 percent of national production consists of the Fuerte variety, followed by Hass at about 30 percent. The remaining 20 percent comprises traditional varieties such as X-Ikulu, Zutano, Dulu, X-Muna, Tonnage, and Mwaikokyesa, along with improved commercial varieties including Gem, Bacon, Nabal, Pinkerton, DUSA, and Carmen.

Plate 1: Avocado Growing Regions in Tanzania



Source: Tanzania Horticultural Association (TAHA)

In Tanzania, avocado harvest periods vary by production zone. In the Southern Highlands Zone (Mbeya, Iringa, Rukwa, Njombe, and Ruvuma Regions), the main harvest season occurs from March to May, with a minor harvest period from January to February. In the Northern Zone, the primary harvest season extends from June to September, while the low season falls between December and January. These staggered harvest windows position Tanzania competitively in the global market, as they coincide with off-season periods in many other avocado-producing countries.

Table 1: Tanzania Avocado Harvest Seasons by Production Zone

Zone	Variety	Jan	Feb	Mar	April	May	June	July	August	Sept	Oct	Nov	Dec
Southern Zone	Hass												
	Fuerte												
Northern Zone	Hass												

Source: Ministry of Agriculture, Tanzania

Key:
Low Season
High Season

Table 2: Production Seasonality by Regions in Tanzania

Region	Varieties	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Arusha	Fuerte												
Kilimanjaro	Hass & Fuerte												
Ruvuma	Fuerte												
Iringa	Hass &Fuerte												
Mbeya	Hass & Fuerte												
Songwe	Hass & Fuerte												
Rukwa	Fuerte												
Kigoma	Green												
Kagera	Hass & Fuerte												
Mwanza	Green												
Manyara	Fuerte												
Njombe	Hass & Fuerte												
Geita	Green												
Mara	Fuerte												

Source: Ministry of Agriculture, Tanzania

Key:

Low Season

High Season

Consumption

Avocados remain primarily a domestically consumed commodity in Tanzania, with an estimated 80–90 percent of production absorbed locally. Strong demand is driven by consumer preference for larger, high-fat local varieties and increasing interest in nutrient-dense foods. The main harvest from January to September ensures ample supply, while consumption patterns are influenced by seasonal availability.

Households predominantly consume fresh avocados, either sliced or mashed for snacks, breakfast dishes, salads, and sandwiches. Urban markets have seen growing demand for avocado smoothies and juices. In addition to fresh use, avocados are processed into homemade spreads and small-scale oil products, contributing to household nutrition and supplemental income.

Smallholder farmers dominate the supply chain, though producer margins are often constrained by limited extension services and market inefficiencies. Farm gate prices range from $1 to $1.50 per kilogram; however, many producers report dissatisfaction due to limited extension support, pest and disease pressures, market inefficiencies, and vulnerability to climate variability. Meanwhile, most traders express satisfaction with profitability, reflecting inconsistent returns across segments of the supply chain. Retail prices generally range from $3 to $5 per kilogram, with export-oriented varieties commanding premiums. Major consumption centers include Dar es Salaam, Kilimanjaro, Mbeya, Kagera, Tanga, and Morogoro.

Local avocado varieties are preferred by consumers in the domestic market for the simple reason that they’re larger in size and have high fat content. Yet, export-oriented varieties are sold at higher prices. The price for commercial avocado varieties such as Hass and Fuerte is about $1.50 per kilo, while the price for local varieties is about $0.50 - $1 per kilo.

Trade

FAS Dar es Salaam projects a 13.6 percent increase in Tanzania's avocado exports for CY 2026, reaching an estimated 40,000 MT from 35,208 MT in 2025, driven by rising production and strong global demand. Most exports are transported via refrigerated sea freight using controlled atmosphere reefer containers through the Ports of Dar es Salaam and Mombasa, while late-season shipments increasingly rely on air freight from Julius Nyerere International Airport to preserve quality for markets such as India and China. According to Trade Data Monitor, Tanzania exported 35,208 MT of avocados valued at $64.2 million in CY 2025, reflecting the country's robust growth trajectory in the global avocado market while maintaining a mid-tier export position relative to regional competitors.

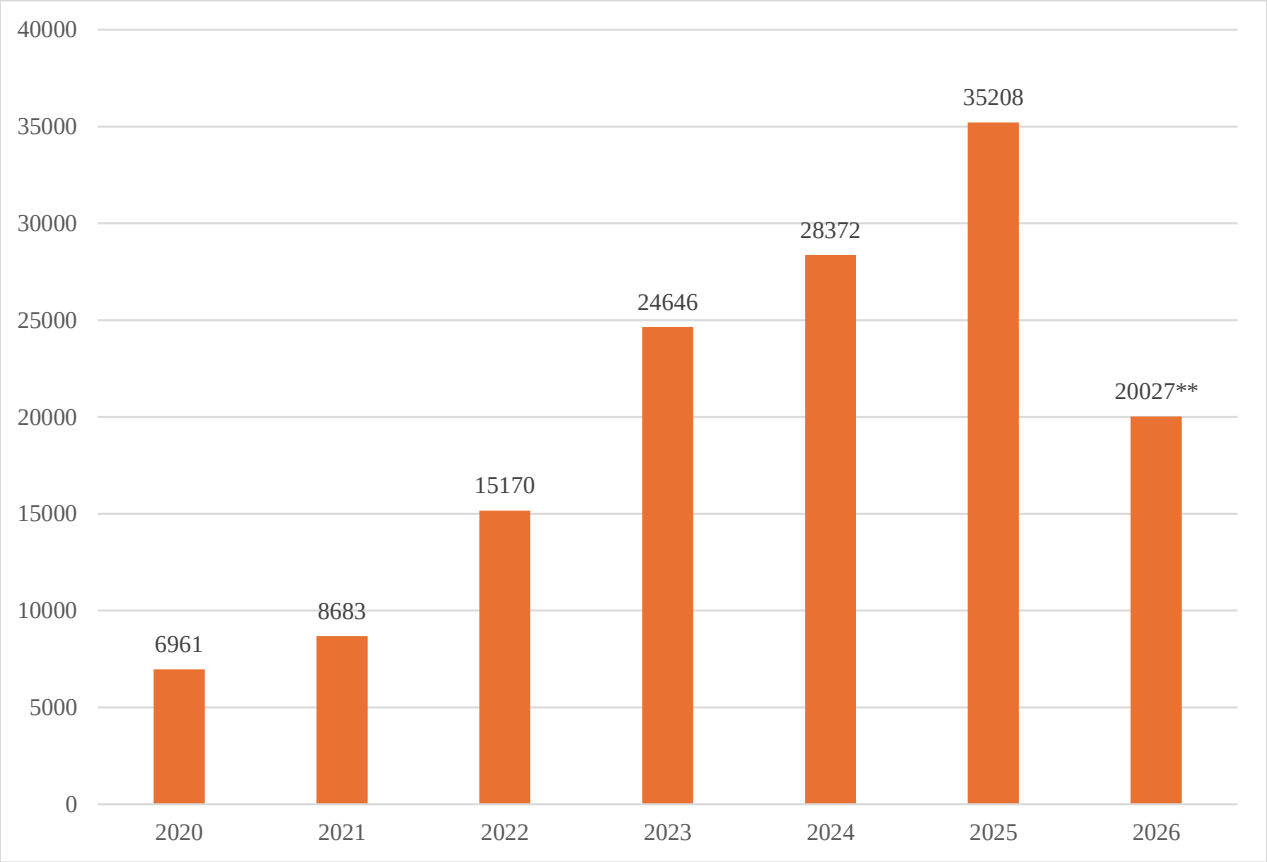
Table 3: Major Avocado Importers from Tanzania 2020-2025, MT.

Importer	2020	2021	2022	2023	2024	2025	2026**	Total (2020–2026)
EU 27	5,077	5,656	9,575	14,374	14,463	6,083	3,693	58,921
India	0	0	1,104	3,491	7,888	15,991	9,149	37,623
Uganda	0	0	0	40	401	6,227	1,495	8,163
United Kingdom	902	1,181	2,200	2,641	712	401	0	8,037
South Africa	0	396	1,038	806	1,163	2,809	1,429	7,641
Saudi Arabia	107	43	560	979	2,532	1,130	564	5,915
Other	226	781	138	304	407	1,119	1,262	4,237
Türkiye	23	64	200	1,056	253	871	1,118	3,585
Hong Kong	45	136	0	215	100	322	1,142	1,960
Ukraine	37	219	279	562	423	226	1	1,747
Kenya	500	143	0	21	0	0	150	814
Switzerland	44	64	76	157	30	29	24	424

Source: Trade Data Monitor. LLC
**Data available up to September 2026

Between 2020 and 2026, the EU-27 was by far the largest importer of Tanzanian avocados, with cumulative imports of 58,921 MT, followed by India with 37,623 MT, reflecting rapid growth since 2022 and highlighting India's emergence as a key export market. A second tier of important destinations includes Uganda (8,163 MT), the United Kingdom (8,037 MT), and South Africa (7,641 MT). Saudi Arabia (5,915 MT) and Türkiye (3,585 MT) also became increasingly significant markets, while Hong Kong (1,960 MT) showed particularly strong growth by 2026. In contrast, Ukraine (1,747 MT), Kenya (814 MT), and Switzerland (424 MT) accounted for relatively small volumes. Overall, the data indicate that Tanzania's avocado exports have become increasingly concentrated in the EU and rapidly expanding Asian markets, particularly India, while regional African markets such as Uganda and South Africa are also gaining importance.

Figure 1: Trends of Total Avocado Exports from Tanzania 2020-2026



Source: Trade Data Monitor, LLC
**Data available up to September 2026

The export sector continues to benefit from growing international demand; however, domestic consumption has also risen, occasionally exceeding local supply, resulting in Tanzania importing avocados from neighboring Rwanda and Kenya during off-peak periods. This development highlights the need for ongoing monitoring of supply-demand balances and suggests the industry may be operating near domestic market constraints.

Overall, Tanzania's avocado export industry demonstrates strong potential for continued growth driven by expanding production, improved market linkages, and rising global demand. Key challenges include yield variability, inconsistent data reporting, and balancing domestic food security considerations with export ambitions. Continued coordination among government institutions, producers, and exporters remains essential to strengthen compliance, enhance value chain efficiency, and support expansion into high-value export markets.

Table 4: Top Exporters of Avocado to Tanzania

Reporter	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**
Kenya	0	65	100	150	266	64
Rwanda	0	0	0	0	0	19
South Africa	0	0	0	0	0	2
Total	**0**	**65**	**100**	**150**	**266**	**85**

Source: Trade Data Monitor, LLC

Tanzania’s avocado imports remain relatively low, totaling just 85 MT in 2025. Imports rose steadily from 65 MT in 2021 to a peak of 266 MT in 2024, before declining sharply in 2025. Kenya remained the dominant supplier, accounting for 96.8 percent of total imports during 2021–2025, while Rwanda and South Africa entered the market in 2025 with 19 and 2 metric tons, respectively, indicating modest diversification of import sources.

Attachments:

No Attachments.