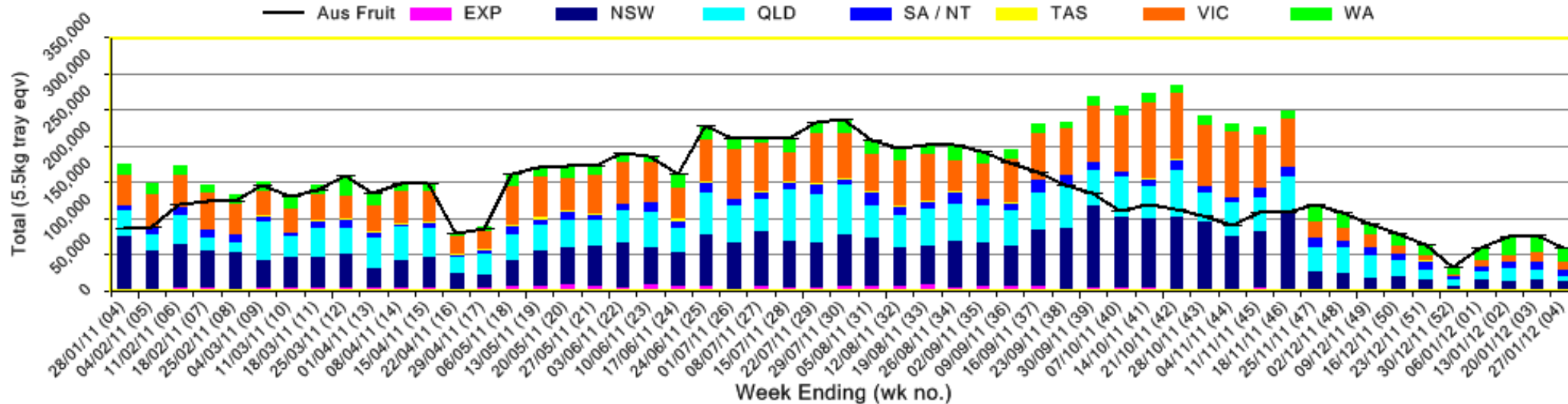


# INFOCADO WEEKLY REPORT: 21st - 27th January 2012 (Wk 4)

Industry Dispatches By Destination State and Count Size : 21st January - 27th January 2012 (Wk 4)

Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Total
EXP		80							317	467			1,495
NSW	1,136	1,499	1,814	1,401			1,778	604	336		1,408	486	11,216
QLD	487	587	965	534	1,070	300	447	375	375		884		6,372
SA / NT	506	560	1,394	2,354	152	1,246	1,877	460	78		668		9,842
VIC	1,916	2,467	2,202	1,361		745	287	332			871	605	11,004
WA	477	1,078	2,052	4,069		4,023	2,012	638	23		1,497		17,094
<b>Total</b>	<b>4,522</b>	<b>6,271</b>	<b>8,427</b>	<b>9,719</b>	<b>1,222</b>	<b>8,092</b>	<b>5,227</b>	<b>2,458</b>	<b>568</b>	<b>46,506</b>	<b>5,675</b>	<b>1,091</b>	<b>57,022</b>

Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2012 to date = 263,481 5.5kg tray eqv



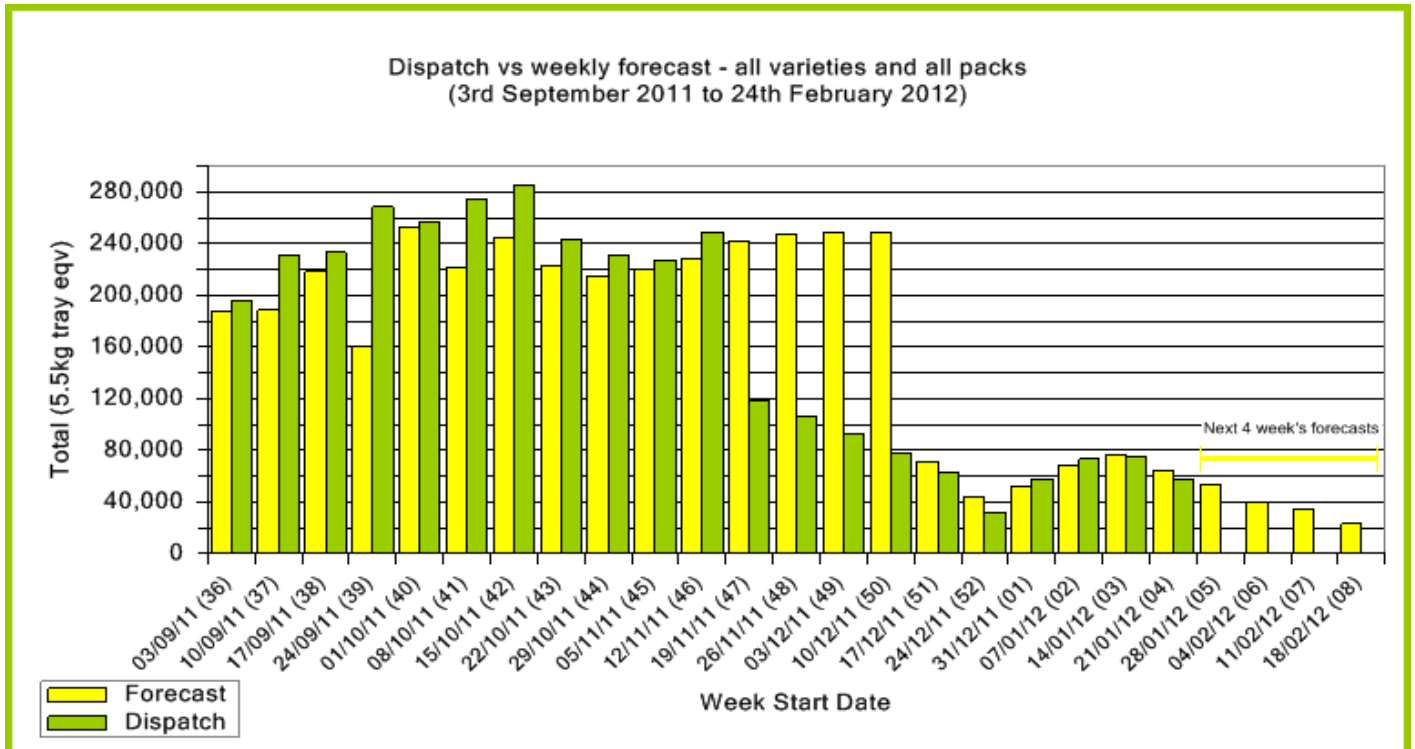
## CEO Comments

- NZ forecasts and dispatches are not included in this report. The most up to date import data has been included on page 2 and has been sourced from Australia Customs records.
- Please take time to review the January Quarterly Report which was sent out last week. Given the predicted volumes for 2012, all packhouses and growers will need to work closely with their supply chain contacts to ensure fruit moves through the system.
- If less than 3 packhouses have contributed data for a region their names are removed from the contributors list on page 3 of this report. This is done to help keep individual's data confidential and is the reason why the packhouse contributor's list for this week's report seems small.
- Growers are urged to make sure new season Hass fruit reaches a Dry Matter reading of 23% or above and Shepard reaches 21% before being sent to market. Instructions on how to conduct Dry Matter tests at home are included at the back of this report.



Forecast Data (Week 4 - 8)				
Variety	Trays - Total	Bulk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	5.5Kg Eqv
<b>Week 4 - begin 21/01/2012</b>				
Gwen	2,200	450		3,018
Hass	42,573	5,518		52,606
Lamb Hass	4,900	450		5,718
Reed	1,447			1,447
Shepard	1,130			1,130
<b>Week Total</b>	<b>52,250</b>	<b>6,418</b>		<b>63,919</b>
<b>Week 5 - begin 28/01/2012</b>				
Gwen	800	600		1,891
Hass	34,417	3,890		41,490
Lamb Hass	4,100	390		4,809
Reed	1,670	176		1,990
Shepard	3,600	50		3,691
<b>Week Total</b>	<b>44,587</b>	<b>5,106</b>		<b>53,871</b>
<b>Week 6 - begin 04/02/2012</b>				
Gwen	1,000		4,000	1,727
Hass	22,992	2,475		27,492
Lamb Hass	2,200	200		2,564
Reed	2,200	350		2,836
Shepard	5,630	50		5,721
<b>Week Total</b>	<b>34,022</b>	<b>3,075</b>	<b>4,000</b>	<b>40,340</b>
<b>Week 7 - begin 11/02/2012</b>				
Hass	19,072	1,570		21,927
Lamb Hass	2,200	200		2,564
Reed	1,700	120		1,918
Shepard	8,605	50		8,696
<b>Week Total</b>	<b>31,577</b>	<b>1,940</b>		<b>35,104</b>
<b>Week 8 - begin 18/02/2012</b>				
Hass	15,452	1,170		17,579
Lamb Hass	1,200			1,200
Reed	1,200			1,200
Shepard	2,650	250		3,105
<b>Week Total</b>	<b>20,502</b>	<b>1,420</b>		<b>23,084</b>

Green shading indicates dispatch data		Yellow shading indicates forecast data		
Dispatch Data (Week 4 - begin 21/01/2012)				
Variety	Trays	Bulk	P/PK	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Total Trays
Gwen	725	449		1,541
Hass	37,216	4,617	1,091	45,809
Lamb Hass	4,593	472		5,451
Reed	2,882	137		3,131
Shepard	1,090			1,090
<b>Total</b>	<b>46,506</b>	<b>5,675</b>	<b>1,091</b>	<b>57,022</b>



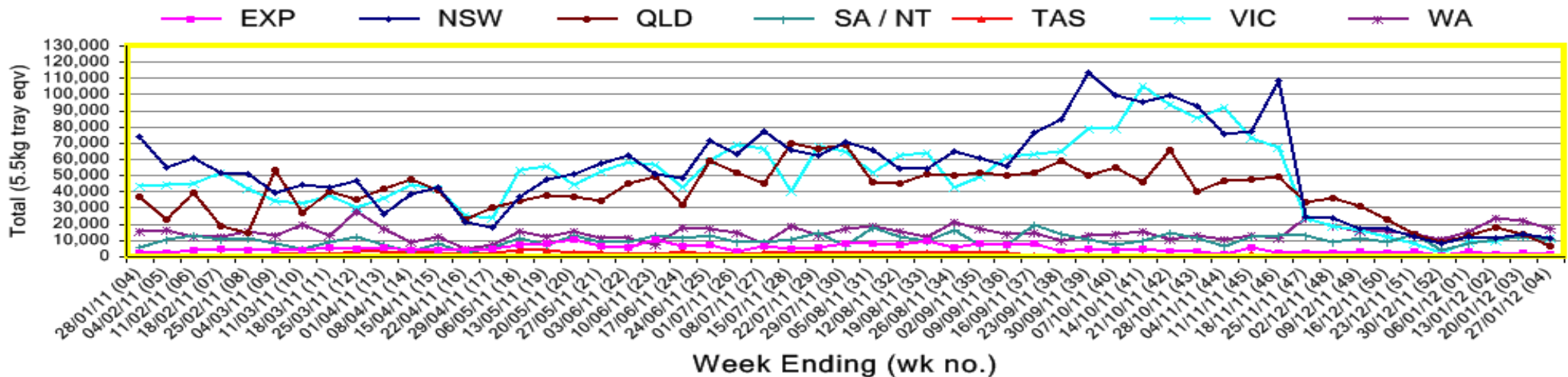
New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) August 2011-April 2012										
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to date
<b>NZ Export to Australia Forecast</b>	33,520	313,264	508,152	667,235	591,141	660,876	305,159	26,101	10,208	<b>3,115,656</b>
<b>Australia</b>		314,209	617,690	655,540	685,179					<b>2,272,618</b>
<b>USA</b>		11,782	47,380	36,098						<b>95,260</b>
<b>Japan</b>	818	24,196	106,337	123,344						<b>254,695</b>
<b>Total</b>	<b>818</b>	<b>350,187</b>	<b>771,407</b>	<b>814,982</b>	<b>685,179</b>					<b>2,622,573</b>

Percentage dispatched by region (Based on seasonal forecast - 2012)

■ Dispatch for season so far as a proportion of regional forecast  
■ 12 month relative regional Forecast



Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2012 to date = 263,481 5.5kg tray eqv



Week 4 contributors - Packhouses

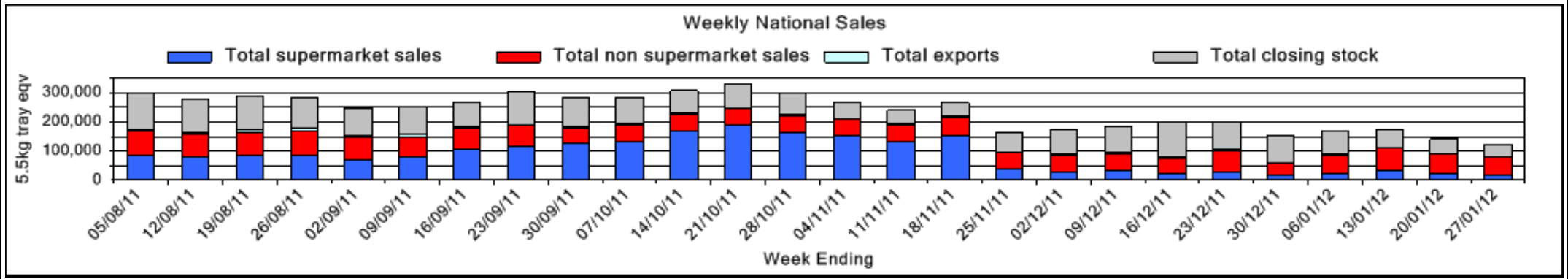
- Advance Packing & Marketing Services P/L
- Ashbourne Hills Avocados
- Avonova
- C F Fechner
- Chinoola Orchards
- Delroy Orchards
- Mariners Rest
- Natures Fruit Company
- One Harvest
- Sunfresh
- Willow Creek

Week 4 contributors - Wholesalers

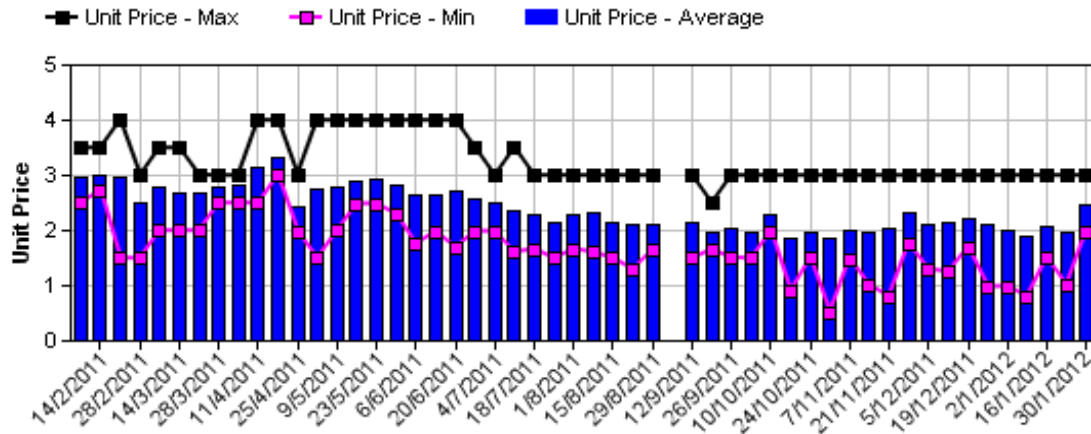
- Allcrops Pty Ltd (Sydney)
- Avanti Fresh Produce Pty Ltd (Melbourne)
- Costa Farms (Adelaide)
- Costa Farms (Brisbane)
- Costa Farms (Melbourne)
- Costa Farms (Perth)
- Dykes Bros (Melbourne)
- Etherington (Perth)
- Fresh Choice WA Pty Ltd (Perth)
- Freshmax Pty Ltd (Brisbane)
- Kelly's (Melbourne)
- Murray Bros (Brisbane)
- Sculli & Co Pty Ltd (Melbourne)
- Sinclair & Antico (Aust) Pty Ltd (Sydney)
- The La Manna Group (Adelaide)
- The La Manna Group (Brisbane)
- The La Manna Group (Melbourne)
- United Fresh (Adelaide)

## Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

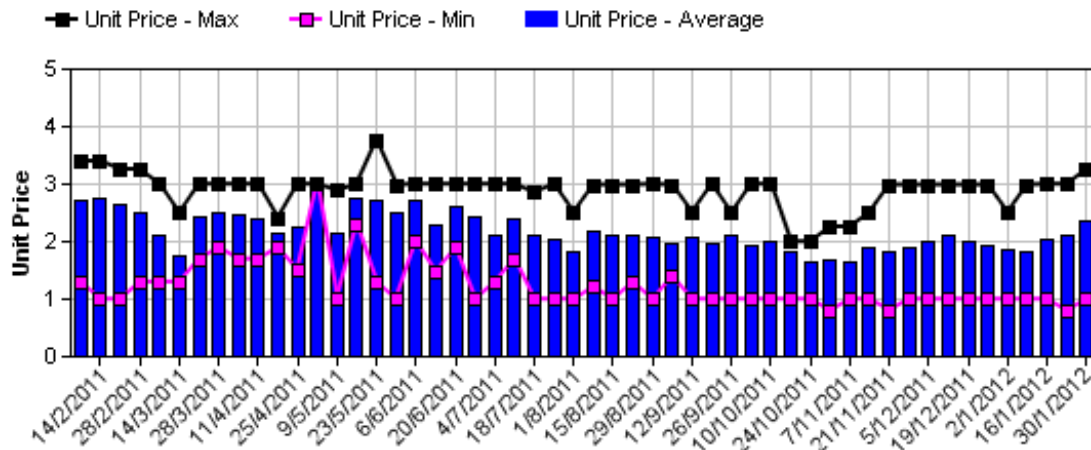
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total supermarket sales</b>																		
<b>Total non supermarket sales</b>																		
<b>Total exports</b>																		
<b>Total sales</b>	9,706	402	868	10,976	652		282	934	1,698						10,891	402	1,381	12,674
<b>Total Stock on Hand</b>																		
QLD																		
<b>Total supermarket sales</b>	275	1,090		1,365	52			52	95						370	1,090		1,460
<b>Total non supermarket sales</b>	15,982	228	731	16,941	495		12	507	922						16,882	228	753	17,863
<b>Total exports</b>																		
<b>Total sales</b>	16,257	1,318	731	18,306	547		12	559	1,016						17,252	1,318	753	19,322
<b>Total Stock on Hand</b>	8,010	144	31	8,185	280			280	509						8,519	144	31	8,694
SA & TAS																		
<b>Total supermarket sales</b>	9,471		1,125	10,596	36			36	65						9,536		1,125	10,661
<b>Total non supermarket sales</b>	5,999		275	6,274	363		299	662	1,204						6,659		819	7,478
<b>Total exports</b>																		
<b>Total sales</b>	15,470		1,400	16,870	399		299	698	1,269						16,195		1,944	18,139
<b>Total Stock on Hand</b>	7,991		1,505	9,496	725		924	1,649	2,998						9,309		3,185	12,494
VIC																		
<b>Total supermarket sales</b>																		
<b>Total non supermarket sales</b>	14,012	10	753	14,775	1,001		112	1,113	2,024						15,832	10	957	16,798
<b>Total exports</b>																		
<b>Total sales</b>	14,012	10	753	14,775	1,001		112	1,113	2,024						15,832	10	957	16,798
<b>Total Stock on Hand</b>	11,190		83	11,273	100		62	162	295						11,372		196	11,568
WA																		
<b>Total supermarket sales</b>	6,172			6,172	19			19	35						6,207			6,207
<b>Total non supermarket sales</b>	4,721			4,721	815		13	828	1,505						6,203		24	6,226
<b>Total exports</b>	864			864	347			347	631						1,495			1,495
<b>Total sales</b>	11,757			11,757	1,181		13	1,194	2,171						13,904		24	13,928
<b>Total Stock on Hand</b>	3,613			3,613	173			173	315						3,928			3,928
Total																		
<b>Total supermarket sales</b>	15,918	1,090	1,125	18,133	107			107	195						16,113	1,090	1,125	18,328
<b>Total non supermarket sales</b>	50,420	640	2,627	53,687	3,326		718	4,044	7,353						56,467	640	3,932	61,040
<b>Total exports</b>	864			864	347			347	631						1,495			1,495
<b>Total sales</b>	67,202	1,730	3,752	72,684	3,780		718	4,498	8,178						74,075	1,730	5,057	80,862
<b>Total Stock on Hand</b>	34,251	174	2,027	36,452	1,278			2,264	4,116						36,575	174	3,820	40,569



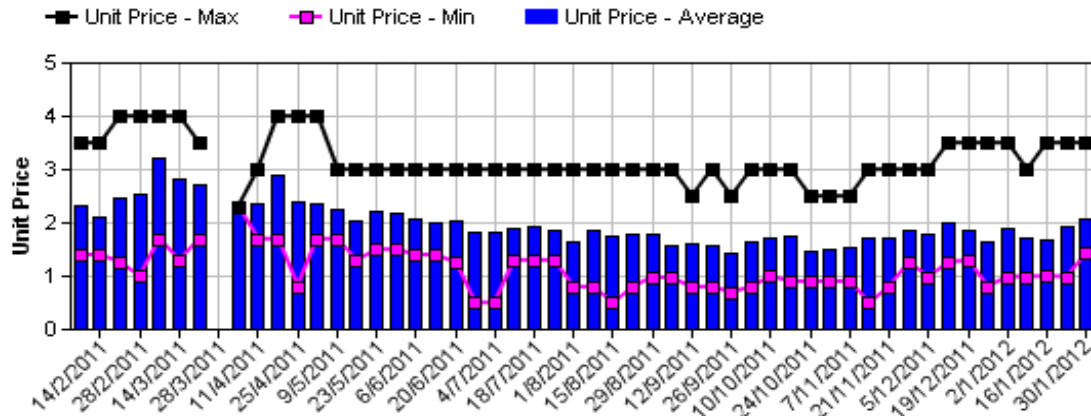
### Hass Avocado Average Retail Prices - Sydney



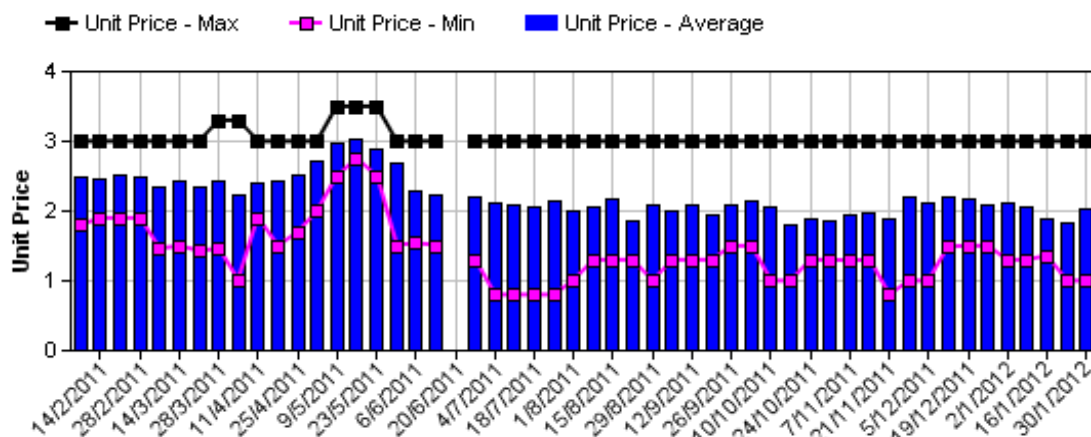
### Hass Avocado Average Retail Prices - Melbourne



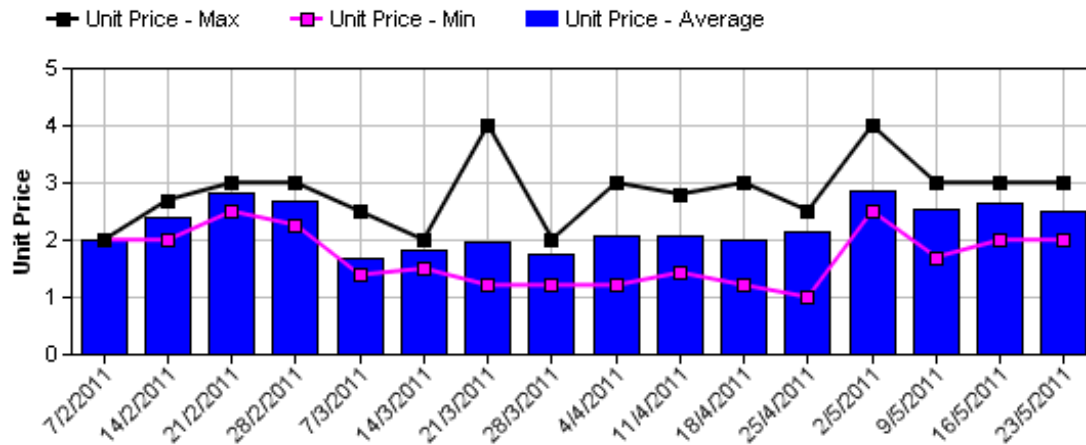
### Hass Avocado Average Retail Prices - Brisbane



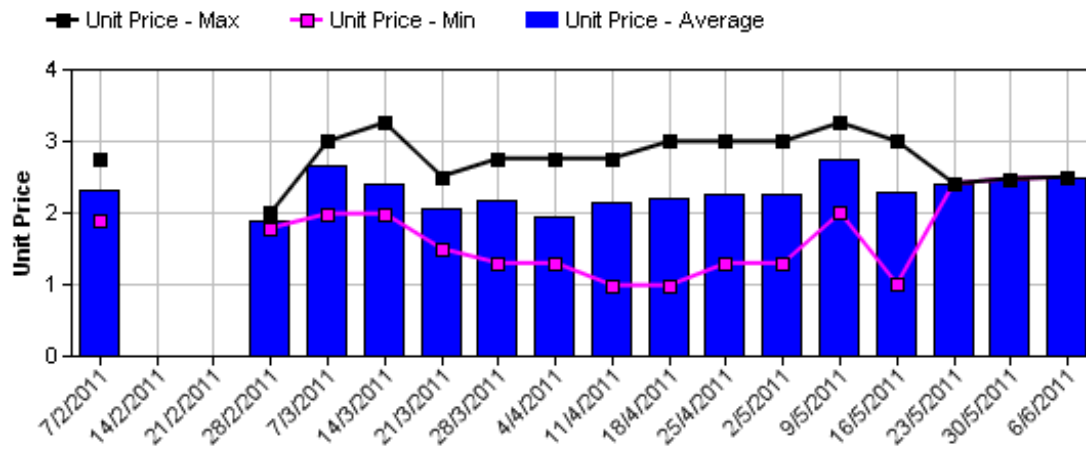
### Hass Avocado Average Retail Prices - Perth



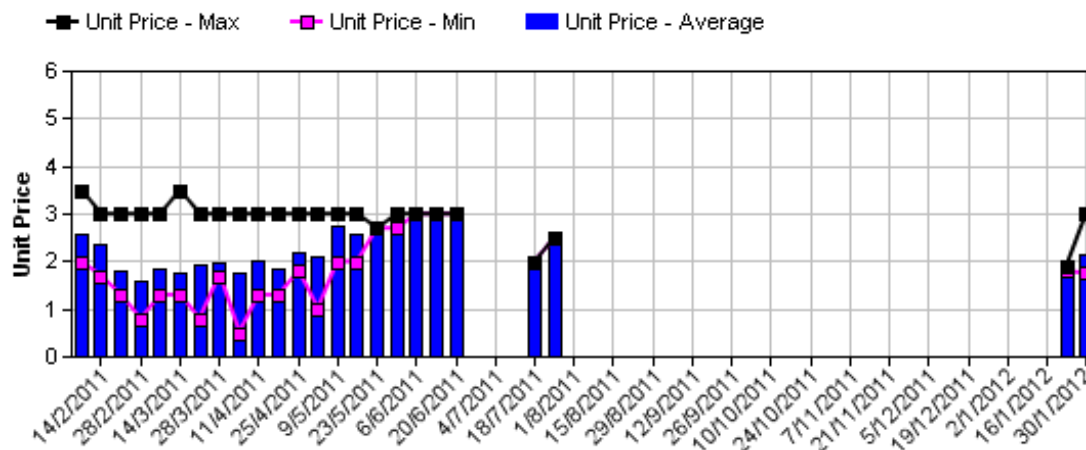
### Shepard Avocado Average Retail Prices - Sydney



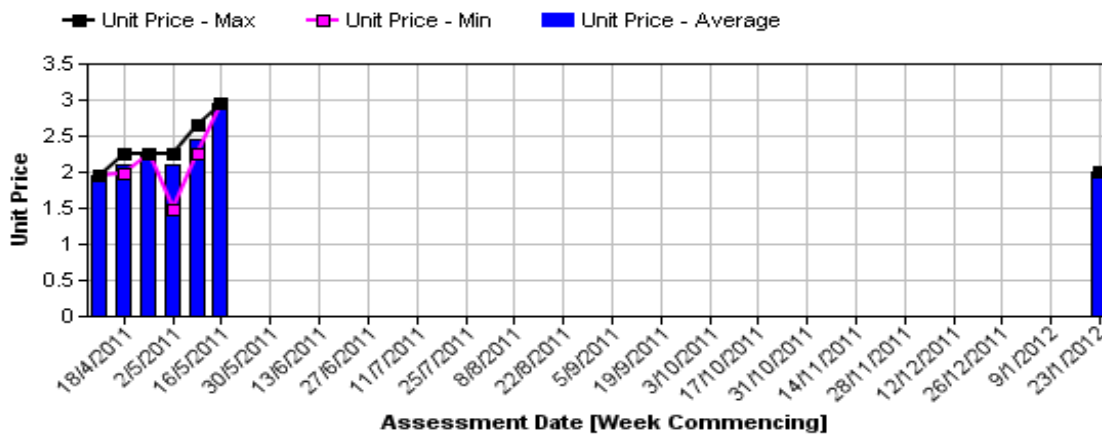
### Shepard Avocado Average Retail Prices - Melbourne



### Shepard Avocado Average Retail Prices - Brisbane



### Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]



## Retail Prices by City, Store and Variety - 30th January 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>						<b>MELBOURNE</b>					
Coles	Hass	290	1.98	No	NZ	I	Hass	235	0.99	No	NS
Coles	Hass	280	1.98	No	NZ	Coles	Hass	280	1.98	No	NZ
Coles	Hass	265	1.98	No	NZ	Coles	Hass	305	1.98	No	NS
IGA	Hass	270	1.99	No	Mixed	Coles	Hass	310	1.98	No	NZ
Woolworths	Hass	260	2.48	No	NZ	I	Hass	264	1.99	No	Mixed
Woolworths	Hass	290	2.48	Store	NZ	I	Hass	285	2.47	No	Aus
Woolworths	Hass	270	2.48	Store	NZ	IGA	Hass	280	2.47	No	NZ
I	Hass	280	2.49	No	Aus	Safeway	Hass	290	2.48	No	NZ
I	Reed	450	2.49	No	Aus	Safeway	Hass	285	2.48	No	NZ
I	Hass	260	2.49	No	Aus	Safeway	Hass	310	2.48	No	NZ
I	Reed	500	2.50	No	Aus	I	Hass	275	2.48	No	Aus
I	Reed	400	2.50	No	Aus	I	Hass	280	2.49	No	Aus
I	Hass	300	2.50	No	NZ	IS	Hass	245	2.49	No	NZ
I	Hass	300	2.50	No	NZ	I	Hass	300	3.25	No	Aus
Foodworks	Hass	280	2.79	No	Aus	I	Hass	280	3.25	No	Aus
I	Reed	480	2.99	No	Aus	<b>PERTH</b>					
I	Hass	325	2.99	No	Aus	I	Hass	190	0.99	No	Aus
IGA	Hass	370	2.99	No	Aus	IGA	Hass	230	1.39	Store	Aus
I	Hass	300	2.99	No	Aus	Coles	Hass	260	1.80	Cat	Aus
I	Reed	510	3.99	No	Aus	Coles	Hass	235	1.80	Cat	Aus
<b>BRISBANE</b>						Woolworths	Hass	240	1.98	Store	Aus
IGA	Hass	240	1.42	Store	Aus	Woolworths	Hass	215	1.98	Store	Aus
IGA	Hass	200	1.42	No	Aus	I	Hass	235	1.99	No	Aus
Woolworths	Reed	335	1.74	No	Aus	Woolworths	Hass	220	1.99	Store	Aus
Woolworths	Hass	245	1.74	Store	NZ	IS	Hass	270	1.99	Store	Aus
Woolworths	Shepard	240	1.74	No	Aus	I	Hass	270	1.99	No	Aus
Woolworths	Hass	280	1.74	Store	NZ	IGA	Hass	310	1.99	Store	Aus
Woolworths	Hass	235	1.74	No	NZ	I	Hass	260	2.49	No	Aus
Coles	Hass	245	1.75	Cat	NZ	IGA	Hass	270	2.49	No	Aus
Coles	Hass	220	1.75	Cat	NZ	IGA	Hass	260	2.49	No	Aus
Coles	Hass	255	1.75	Cat	NZ	I	Hass	285	2.99	No	Aus
I	Shepard	210	1.79	Store	Aus						
I	Hass	360	1.99	Store	NS						
I	Hass	250	1.99	Store	Aus						
I	Shepard	240	1.99	Store	Aus						
IGA	Hass	280	1.99	No	Aus						
I	Reed	545	1.99	No	Aus						
I	Hass	305	1.99	No	NZ						
I	Hass	265	2.89	Store	NS						
I	Hass	305	2.99	No	Aus						
I	Wurtz	285	2.99	No	Aus						
I	Shepard	245	2.99	Store	Aus						
I	Hass	340	3.49	Store	Aus						

Size ranges based on 5.5kg trays	
Size	Weight Range
28	185 - 208g
25	208 - 230g
23	230 - 245g
22	245 - 263g
20	263 - 290g
18	290 - 325g
16	325 - 363g

### Special Codes

Cat = fruit is on catalogue special for that city this week  
 Store = fruit is on special in that store only this week

### Country of Origin Codes

Aus = display sign indicates fruit is from Australia  
 NZ = display sign indicates fruit is from New Zealand  
 NS = display sign doesn't say where fruit is from

### Store Codes

I = Independent Fruit and Vegetable stores  
 IC = Independent Fruit and Vegetable store Chains  
 IS = Independent Supermarkets

## Maturity and Dry Matter Testing

The Industry mandated standard for Hass avocados in terms of maturity was in 2009 updated from 21% to 23% Dry Matter (DM) at time of harvesting. This was based on consumer research which showed that consumer acceptance of the quality of avocados declined from approximately 95% to 70% if the DM was below 23% and that up to 70% of consumers would choose 26% DM avocados over 22% DM avocados.

The standard for Shepard avocados remains at 21% DM. These standards aim to assist growers and packhouses to supply the best tasting avocados to consumers.

Avocados Australia has implemented a project to randomly sample avocados on a monthly basis from the wholesale market and test for DM percentage as a measure of maturity. The aim of this is to provide data to illustrate how the current level of maturity available to consumers' stacks up against consumer preferences as determined in the consumer testing.

Individual results are sent to each of the grower's whose fruit is tested in any one month. The aggregated results of these tests are also reported on the Avocados Australia website.

### Deciding when to harvest for optimum quality

Given consumer's preferences for mature Shepard and Hass avocados it is particularly important for growers to be monitoring maturing closely in the lead up to harvest. Below is a guide on how to test DM at home.

The below information is based on the following reports/articles:

- The Avocado Agrilink Manual
- Hofman PJ, O'Farrell PJ (2004) The importance of correctly sampling avocado fruit for maturity testing. *Talking Avocados* 15, 24-24.
- Woolf A, Clark C, Terander E, Phetsomphou V, Hofshi R, Arpaia ML, Boreham D, Wong M, White A (2003) Measuring avocado maturity; ongoing developments. *Orchardist* 76, 40-45

The date when minimum harvest maturity is reached will vary from year to year and according to the location on your property, for each variety. For example, large fruit on the northern and eastern side of the tree, and fruit at the top and outside of the canopy usually mature first. Rootstocks may also have an influence.

Avocado fruit have a number of characteristics which help indicate when the fruit may be getting close to minimum maturity. Judging maturity on these characteristics is not reliable, but with the experience of comparing them with DM testing results, they can help indicate when to start testing. These characteristics include:

- More mature fruit can be larger, but this is not very reliable.
- Skin is dull and lustreless, with a powdery appearance, rather than shiny. The usefulness of this characteristic is variety dependent.
- Fruit stalk is yellow rather than green, and the lenticels may become brown and prominent.
- The seed coat is dark, dry and somewhat shrivelled, rather than pale whitish in colour.



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The dates when the fruit have reached minimum maturity in previous seasons is also a useful indicator of when to start maturity testing. Once you think that your fruit may be approaching acceptable maturity, it is important to check by doing a ripening test and a DM test before picking.

### **Ripening test**

For a ripening test, select at least 10 avocados from trees scattered throughout the block that are representative of the fruit that may be ready for harvest. Sample fruit will show no sign of broken skin, insect stings or disease. Allow the fruit to ripen at room temperature, and examine and taste the fruit when ready to eat. Mature fruit usually ripen within 10 to 15 days without shrivelling, and will have good flavour.

### **Dry Matter Test**

Percent DM is the easiest and relatively accurate maturity test for avocados. The % DM at which you harvest will depend on variety and the intended market. The Australian domestic market standard for Hass is now set at a minimum of 23%. This is based on an average DM over a sample of at least 10 fruit.

The DM test involves weighing a sample of flesh before and after drying. The test can be done at home using a household conventional oven, domestic food dehydrator or a microwave (although this can be less reliable because of the risk of burning the samples). Alternatively, some marketing cooperatives and packhouses offer this service for a fee. Here are the details of the various tests based on methods used by Agri-Science Queensland (formerly Queensland Department of Primary Industries). The three components are sampling the fruit, holding the fruit before DM testing and weighing and drying the sample. Poor practices in any of these components will result in inaccurate results.

#### **1. Sample preparation**

##### **a. Using the grated flesh method**

- Harvest at least 10 avocados, making sure that they represent the fruit (size, position on the tree, block etc.) that you intend to harvest.
- Place the fruit in a plastic bag and keep cool. Start the DM test within a few hours of harvest.
- Cut each fruit lengthwise into quarters (stem end to base). Remove the seed as well as any adhering seed coat.
- Select two diagonally opposite quarters from each fruit to provide a total sample of 20 quarters. Peel the 20 quarters.
- Shred the flesh of all 20 quarters using a kitchen grater. Ideally the shreds should be less than 1mm thick. This can be achieved using graters with five cutters per square centimetre.
- Thoroughly mix all of the shredded flesh together.

Or

##### **b. Using the Hofshi Coring Machine (or a similar implement – for small quantities of fruit a hand held cork borer is adequate)**

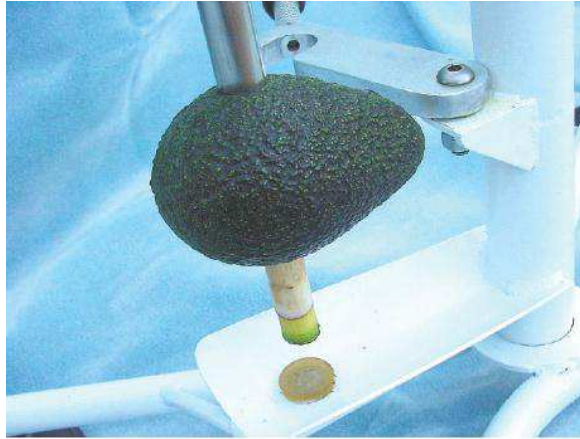
- Bore a 'plug' or core of flesh from the equator of the fruit as seen below. The Hofshi machine pushes a sharpened 15.9 mm metal tube completely through the equator of the fruit, yielding a core of tissue as seen in the below images. The two plugs of flesh generally weigh about 5g (depending on the fruit size).
- Remove the skin and seed coat from the flesh plugs.
- Cut each plug in half so that there are four pieces of flesh from each piece of fruit.



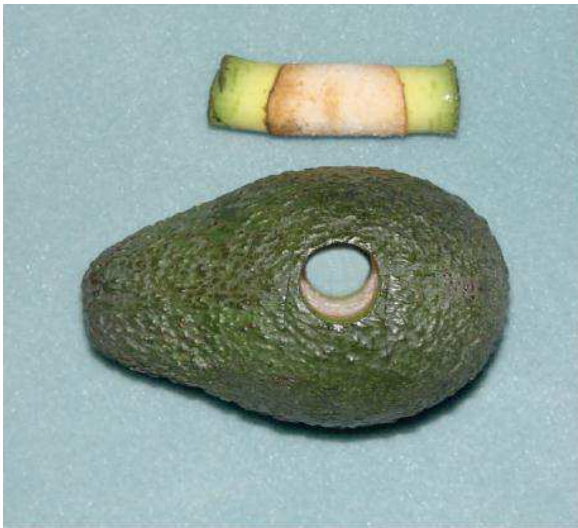
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The Hofshi Corer



The Hofshi machine taking an avocado core sample



A core sample of fruit taken by the Hofshi machine

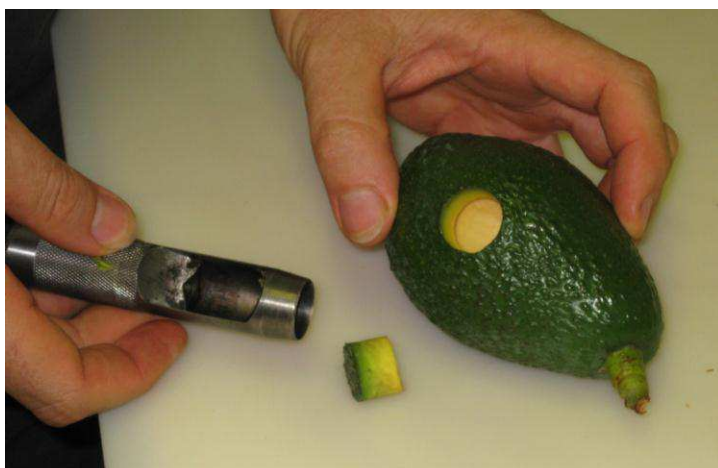
The above photos were taken from Woolf A, Clark C, Terander E, Phetsomphou V, Hofshi R, Arpaia ML, Boreham D, Wong M, White A (2003) Measuring avocado maturity; ongoing developments. *Orchardist* 76, 40-45.

It should take approximately 10 minutes to process (not dry) 10 individual fruit using the Hofshi corer.

NB: An adaptation of the Hofshi corer is available from a New Zealand company. For more information please contact the Avocados Australia office. Alternatively, hand-held 'cork borers' can be purchased from some hardware stores (see below for an example). Make sure the diameter is at least 15.9mm.



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Hand held 'cork borer' available from some hardware stores (photo provided by Matt Weinert, DEEDI, Mareeba)

### **WARNING**

After the flesh is cut/mixed, move IMMEDIATELY to the weighing step below. Any delay will result in moisture loss before weighing, causing inaccurate results.

### ***Drying procedure***

#### ***(a) Conventional Oven***

- Preheat oven to 100 to 110°C.
- Use a shallow, ovenproof container. Weigh the dry/empty container and record this weight.
- Spread at least 100g of the shredded avocado (if using the grated sample method) or all the pieces from the core samples (if using the corer sampling method) evenly onto the container and weigh. Record this weight. Use a balance with 2 decimal places if the wet flesh weight is less than 20gm, as may be the case if measuring individual fruit DM with the corer.
- Place the container in the centre of the oven and leave undisturbed for five hours. During drying, be careful to avoid burning the avocado flesh.
- Avoid or at least minimise opening the oven door during this period. An easily read oven thermometer is useful to monitor the actual oven temperature.
- After five hours, allow to cool in a dry environment for no more than five minutes, and re-weigh to determine dried avocado weight.
- With initial tests, redry the sample for a further 30 minutes and then re-weigh to ensure that the sample is fully dried.

#### ***(b) Domestic Food Dehydrator (models that go to 60-65°C)***

- Use approximately four shallow, heatproof containers (exact number will depend on the size of the fruit).
- Weigh the dry/empty containers and record these weights.
- Spread at least 100g of the shredded avocado (if using the grated sample method) or all the pieces from the core samples (if using the corer sampling method) evenly amongst the containers.
- Weigh the fruit in the containers. Record the weight of each of the containers.
- Place the containers in the dehydrator and leave undisturbed for one day, weigh, then dry for another day and re-weigh to make sure it is dry.



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(c) *Microwave oven*

- Use a shallow, microwave-proof container. Weigh the dry/empty container and record this weight.
- Spread at least 100g of shredded avocado (if using the grated sample method) or all the pieces from the core samples (if using the corer sampling method) evenly onto the container and weigh. Record this weight.
- Set microwave at medium-low for 15 to 20 minutes. **Note: You may need to adjust power setting and time depending on the microwave model.** Avoid burning the flesh.
- Dry to a constant weight by reheating and re-weighing. You can also use the 'snap' test (see below), to determine if the sample is fully dry. Note the time taken for future reference (if you use a different amount of flesh, the setting may need to be changed).
- When first trying the microwave method, keep a constant watch on the sample until you are confident of your settings. To avoid possible damage to your microwave, always place a container of water on the turntable.

**HINT – Snap Test**

A simple way to determine if the sample is fully dried is to take a shred of the dried flesh about five cm long, place it lengthwise between the thumb and forefinger, and try to bend it. If it is brittle and snaps cleanly, it is fully dried. If it bends without snapping, more drying time is required.

**3. Calculate percentage of dry matter**

Use the following calculation:

$$\frac{\text{Weight of dried avocado sample (minus weight of container)} \times 100}{\text{Weight of fresh avocado sample (minus weight of container)}}$$

NB: if you have dried the samples using a domestic food dehydrator with multiple containers you will need to take an average of the DM percentages you calculated for each container.

Please note: There are **no DM standards** for over-maturity, but this fruit should not be marketed. Do not leave fruit on trees beyond the normal picking period. Picking over-mature fruit results in poor flavour and increased fruit diseases and flesh disorders, as well as reducing the yield of the next crop.

