



# INFOCADO CROP FORECAST

## Quarterly Report—July 2009

Welcome to the quarterly Infocado report. This report is released in the months January, April, July and October. Each reports shows the previous 12 month's dispatch figures and the future 12 month's forecast figures including both Australian and New Zealand data where and when available.

### Australian Avocados Forecast Jul 08 to Jun 09 (5.5 kg eqv trays) - from quarterly report July 08

	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	Mar 09	Apr 09	May 09	Jun 09	12 Mth Total
<b>Total</b>	677,526	644,044	665,028	669,714	511,941	511,254	439,615	486,229	749,966	902,092	1,075,263	1,057,821	<b>8,390,494</b>

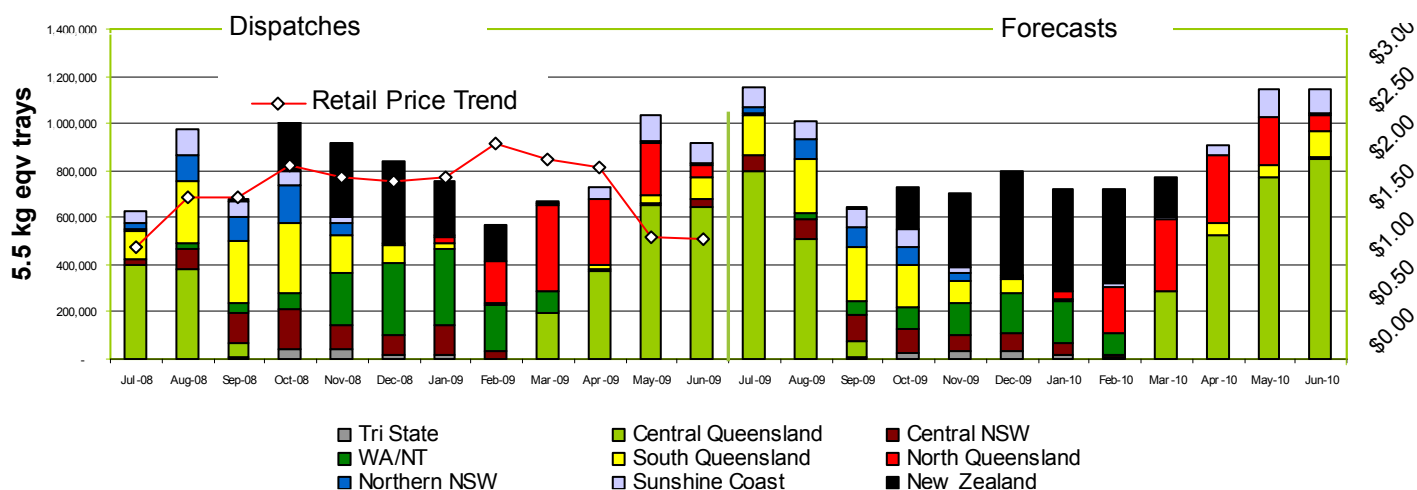
### Australian Avocados Dispatches Jul 08 to Jun 09 (5.5 kg eqv trays)

<b>Total</b>	628,721	971,537	671,441	800,686	605,784	496,232	522,310	415,051	659,453	728,720	1,031,452	913,379	<b>8,444,766</b>
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### Australian Avocados Forecast Jul 09 to Jun 10 (5.5 kg eqv trays)

	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10	12 Mth Total
<b>Hass</b>	1,058,045	935,107	619,452	537,131	378,836	344,985	244,281	103,789	18,987	434,241	1,030,195	1,070,321	<b>6,775,372</b>
<b>Shepard</b>	-	-	-	-	-	-	32,941	217,059	579,118	449,882	51,765	-	<b>1,330,765</b>
<b>Other</b>	95,379	71,955	19,120	14,294	7,353	11,824	12,941	4,965	5,294	23,882	65,882	76,216	<b>409,106</b>
<b>Total</b>	<b>1,153,424</b>	<b>1,007,063</b>	<b>638,572</b>	<b>551,425</b>	<b>386,189</b>	<b>356,809</b>	<b>290,164</b>	<b>325,812</b>	<b>603,399</b>	<b>908,006</b>	<b>1,147,842</b>	<b>1,146,538</b>	<b>8,515,242</b>

Australian & New Zealand Avocados: Jul 08 to Jun 09 Dispatch / Jul 09 to Jun 10 Forecast



### Jul 08 to Jun 09 Dispatches & Jul 09 to Jun 10 Australian Avocado Production Estimates 5.5kg eqv trays

Region	Jul 08 to Jun 09	Jul 09 to Jun 10
<b>North Queensland</b>	1,132,170	1,107,118
<b>Central Queensland</b>	2,687,747	3,800,181
<b>Sunshine Coast</b>	574,509	638,278
<b>Southern Queensland</b>	1,355,557	1,188,918
<b>Northern NSW</b>	466,788	325,454
<b>Central NSW</b>	813,706	585,000
<b>Tri State</b>	129,016	120,529
<b>WA</b>	1,285,273	749,765
<b>Total</b>	<b>8,444,766</b>	<b>8,515,242</b>

### Comments from the CEO

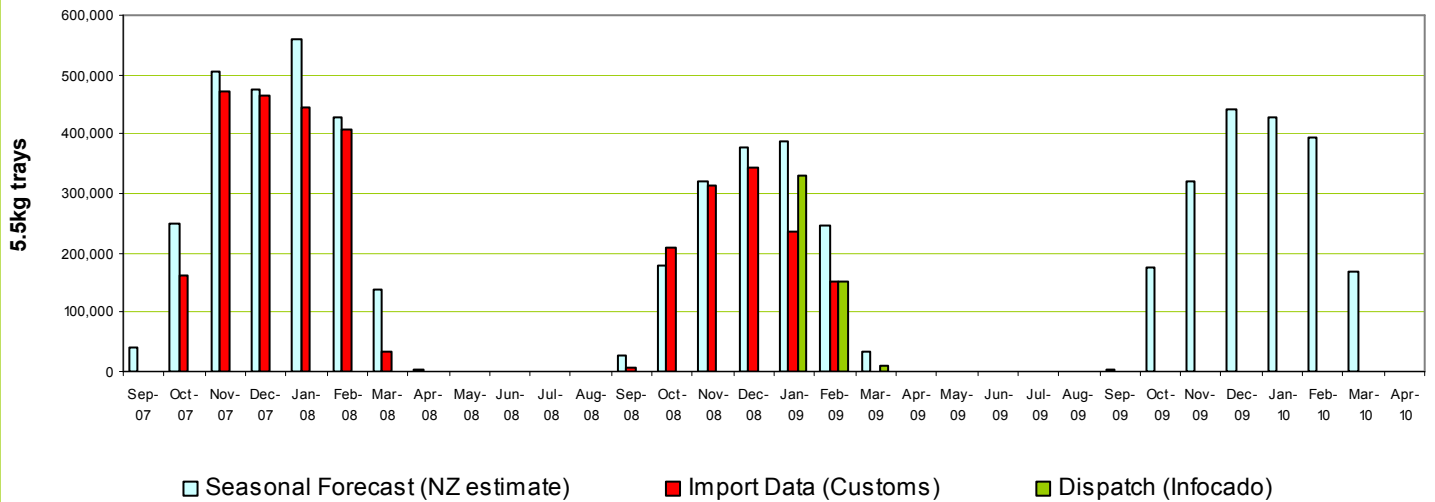
The season continues to produce surprises in both value and volume. For the last 12 months the forecasts and dispatches have been within 10% of each other, with June 09 the first month with a major difference.

Average retail prices have also matched well the volumes moving into the market, with fruit flowing well through the retail system and to date not resulting in any large back log of fruit.

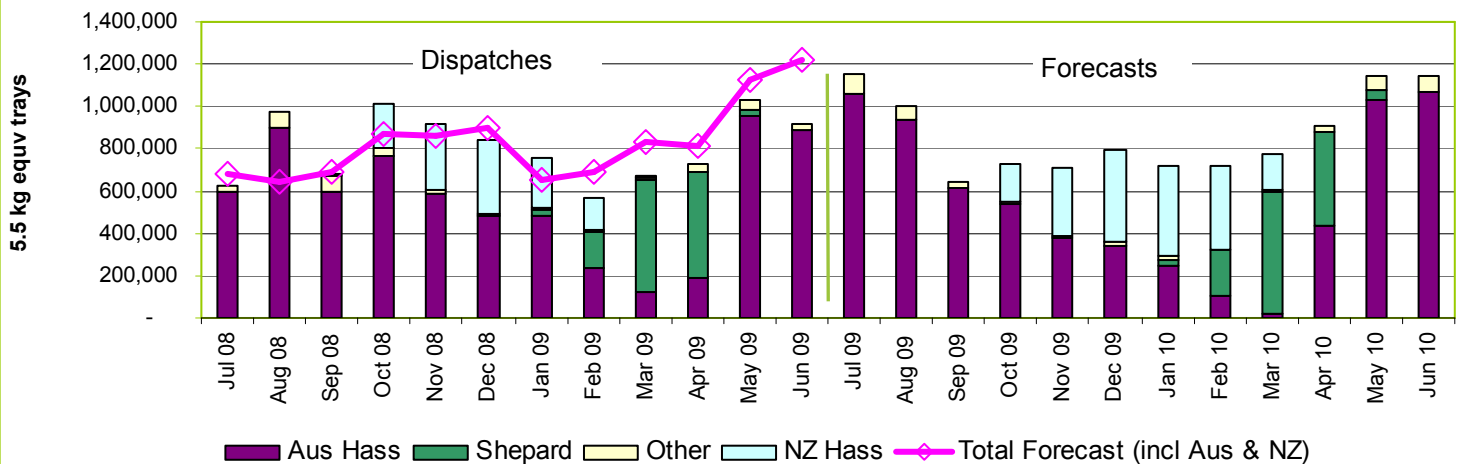
Equally, wholesale pricing has matched volumes and has been helped with extensive industry and retailer promotion that has been underway and will continue for the rest of the financial year.

Forecasts indicate that the 2009-10 summer period will produce significantly less fruit than last year with the Tri-state region still suffering from the worst drought in 100 years and Western Australia having a significant drop in their crop forecast. This will be offset with New Zealand's initial crop estimate being larger than last year. It is looking at this early stage as if the total volume of fruit available in the market will be similar to the 2008-09 summer period.

## New Zealand Avocados - Dispatch and Forecast



## Jul 08 to Jun 09 Dispatches & Jul 09 to Jun 10 Forecasts Avocados by Variety



NB: NZ Dispatch figures sourced from Australian Customs, NZ forecast figures are based on NZ export estimate for 09/10. The total forecast line (pink line) in the chart above illustrates the most up to date forecasts as per previous quarterly reports eg. The October, November & December figures come from the October 08 quarterly report and the figures from January, February & March 2009 come from the January 09 quarterly report.

## Seasonal Forecast Contributors

Advance Packing & Marketing Services	DG & CJ Kafer	Mariners Rest	Sunfresh
Avocado Industry Council (NZ)	Donovan Family Investment Trust	Merrinee Farms	Sunny Bluff Produce Pty Ltd
Avocado Ridge	G & C Christensen	Midcoast Avocados	Sunnyspot Packhouse PL
Avocados With Altitude Pty Ltd	G & J Krenske	Mount Hallen Avocados	Sunrise Avocados
Avonova	Goodlife Orchards	Mountain Fresh	SuperPak
Avowest	Googa Farms	Mt Binga Orchards Pty Ltd	Tam MT Farm Management
Balmoral Orchard	Green Nugget Orchards	Natures Fruit Company	The Avocado Grove
Battistin Orchards	Green Pear Avocado	NJ & JK Donovan	The I & R Family Trust
Bellview Orchards Pty Ltd	Gunnado Farm	One Harvest	Theart Farming Pty Ltd
Blackboy Ridge Pty Ltd	Hilltop Mareeba	Perseverance Farming Co	Tinaroo Falls Avocado Trust
Blushing Acres Pty Ltd	I & A Tolson	R & M Waterman	Touchwood Farming
BT & RG Pegg	J & K Hummer	R & S Bamesse	Tropicado Avocados
C F Fechner	JB & CM Culross	RM & KL Cornwall	VP & EA Farrell
Chinoola Orchards	Jirel Holdings	Rob Farnsworth Pty Ltd	West Aussie Avos
Chislett Developments Pty Ltd	Kulnura Ambrosia Avocados	Serrata Enterprises	Willow Creek
Chris and Sue Allan	Lavers Orchards	Simpson Farms Pty Ltd	WJ Row
Delroy Orchards	Malic Properties Pty Ltd	Summerland House With No Steps	Zanfar Pty Ltd

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**This report has been authorised by Antony Allen, CEO Avocados Australia on the 16th July 2009**