



INFOCADO CROP FORECAST

Quarterly Report— July 2014

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

Australian Avocados Forecast Jul 13 to Jun 14 (5.5 kg eqv trays)

	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	12 Mth Total
Hass	811,652	784,546	711,551	636,026	574,844	408,694	224,524	110,745	32,395	553,529	1,008,016	1,143,559	7,000,081
Shepard	0	0	0	0	0	0	31,355	246,958	742,577	422,605	41,986	0	1,485,481
Other	36,477	105,875	24,825	12,324	47,815	45,884	13,957	17,804	913	16,125	58,805	39,079	419,883
Total	848,129	890,421	736,376	648,350	622,659	454,578	269,836	375,507	775,885	992,259	1,108,807	1,182,638	8,905,445

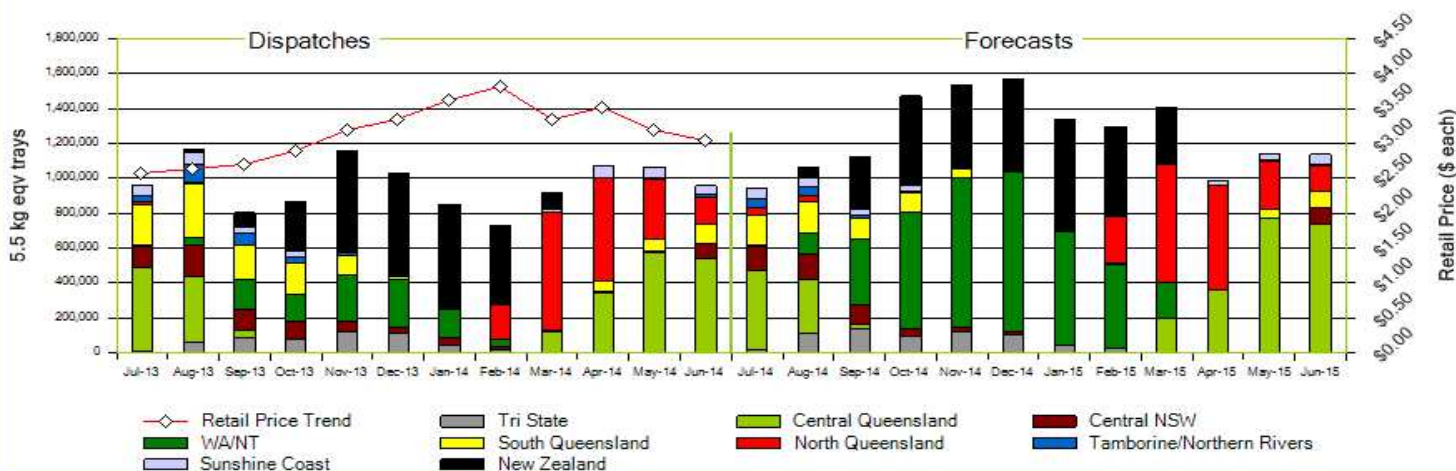
Australian Avocados Dispatches Jul 13 to Jun 14 (5.5 kg eqv trays)

	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	12 Mth Total
Hass	927,713	1,036,076	686,666	567,800	563,360	391,732	200,795	73,826	625	452,376	991,150	928,511	6,820,630
Shepard	0	0	0	0	0	0	0	198,886	807,931	574,515	33,498	0	1,614,830
Other	31,873	112,315	32,860	11,018	8,503	46,766	53,835	6,322	11,320	40,659	38,308	27,978	421,757
Total	959,586	1,148,391	719,526	578,818	571,863	438,498	254,630	279,034	819,876	1,067,550	1,062,956	956,489	8,857,217

Australian Avocados Forecast Jul 14 to Jun 15 (5.5 kg eqv trays)

	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	12 Mth Total
Hass	883,651	954,056	793,101	946,452	1,035,025	994,167	663,163	521,226	259,375	490,223	1,085,900	1,074,081	9,700,420
Shepard	0	0	0	0	0	0	6,350	256,581	801,949	484,460	10,633	2,151	1,562,124
Other	56,951	51,480	31,016	12,841	26,892	47,564	29,345	5,231	14,157	6,666	46,774	59,641	388,558
Total	940,602	1,005,536	824,117	959,293	1,061,917	1,041,731	698,858	783,038	1,075,481	981,349	1,143,307	1,135,873	11,651,102

Australian & New Zealand Avocados : Jul 13 to Jun 14 Dispatch / Jul 14 to Jun 15 Forecast



Jul 13 to Jun 14 Dispatches & Jul 14 to Jun 15 Avocado Production Estimates 5.5kg eqv trays

Region	Jul13 to Jun14	Jul14 to Jun15
North Queensland	1,974,318	2,044,300
Central Queensland	2,485,141	2,856,079
Sunshine Coast	387,391	307,397
Southern Queensland	1,316,874	779,764
Tamb/Northern Rivers	288,306	156,432
Central NSW	765,177	563,913
Tri State	519,484	648,438
Western Australia	1,120,526	4,294,779
Aust. Sub Total	8,857,217	11,651,102
New Zealand	2,693,019	3,352,347
Aust. & NZ Total	11,550,236	15,003,449

Comments from the Infocado Team

The modest supply of avocados has continued throughout the first six months of 2014, therefore strong prices have continued on the domestic market. It has been reported that, due to seasonal difficulties that have been felt throughout the regions over the previous years, fruit volumes and size are still being affected. Heat waves, wind storms and flooding have all contributed to the overall reduction of the total volume of avocados produced.

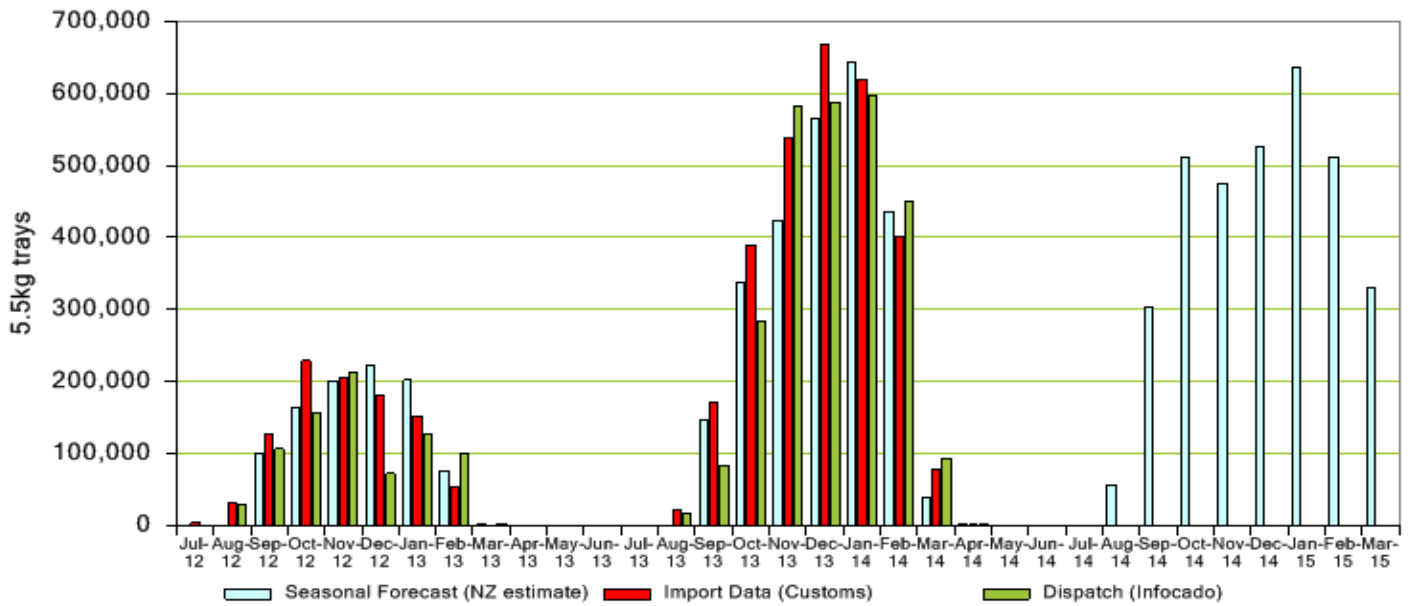
Western Australia and New Zealand have estimated that a very large season is due in 2014/15. With estimated volumes exceeding any prior levels that have been experienced in the Australian domestic market, both regions have reported that harvesting will start earlier than previously thought, mostly beginning in August. These two events coinciding will mean quite large volumes of avocados are set to enter the domestic marketplace during Spring.

The Qualicado program has continued to roll out across the regions moving through 2014 with great success and the first phase is nearing the end. The program has continually focussed upon improving practices (where necessary) thus improving fruit quality throughout the entire supply chain of avocados. Since the launch in North Queensland in August 2013, 12 workshops have been held (regional and metro) with a total of 648 attendees participating. The workshop days have been well received with strong support from industry stakeholders.

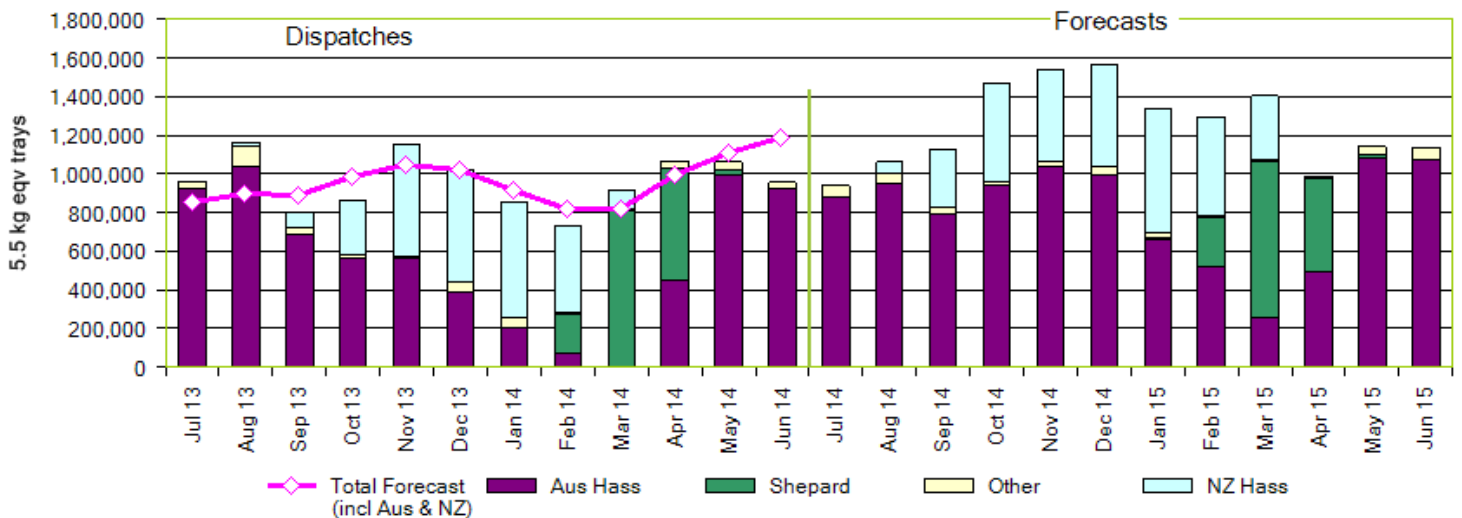
The new marketing campaign that was launched in the first part of 2014 has continued. The campaign has taken many forms including a TV commercial, chef masterclasses, POS material which is currently under production and that focusses on educating consumers about avocado handling, ripening and uses of the avocado. The consumer website has also been redesigned throughout this process to provide a better overall user experience for consumers. The NZ industry has also agreed to contribute funding towards the avocado promotion program in Australia this year to help build continued consumption of avocados.

Please Note: The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons including some packhouse's unwillingness to engage with industry and/or lack of computer access. For this reason it is not possible to extrapolate the figures from the Weekly Infocado Report to come up with either the dispatch and/or forecast figures in the Quarterly Infocado Report. At any time the Weekly Infocado Report incorporates around 85% of total production and forecasts however this does vary depending on time of year (as a result of the fruit coming from different regions with different levels of packhouse input). It is not functionally possible to incorporate allowances for missing data into the Weekly Infocado Report hence the variance between it and the Quarterly Infocado Report.

New Zealand Avocados - Dispatch and Forecast



Jul 13 to Jun 14 Dispatches & Jul 14 to Jun 15 Forecasts Avocados by Variety



NB: NZ Dispatch figures in this graph are from Infocado and Customs data, the total forecast line (pink line) above displays the most up to date forecasts.

Seasonal Forecast Contributors

Central NSW

Coastal Avocados
I & A Tolson
Kulnura Ambrosia Avocados

Central Qld

Avocado Ridge
BT & RG Pegg
Donovan Family Investment Trust
Lava Valley Produce

Simpson Farms Pty Ltd
Sunny Bluff Produce Pty Ltd
SuperPak

New Zealand

Avocado Industry Council (NZAGA)

North Qld

Avocado Estates
Battistin Orchards Pty Ltd

Gunnado Farm

Hilltop Mareeba
Lakeshore Pty Ltd

R & M Waterman

Rockridge Farming Pty Ltd

Tinaroo Falls Avocado Trust

Tropicado Avocados

South Qld

Balmoral Orchard

Googa Farms

G & J Krenske

Green Nugget Orchards

Mountain Fresh

One Harvest

Perseverance Farming Co

Sunnyspot Packhouse Pty Ltd

Touchwood Farming

Wodonga Park Fruit and Nuts

Sunshine Coast

G & C Christensen

Natures Fruit Company

Sunfresh

Tamborine / Northern Rivers

Aussie Orchards Growers & Packers

JB & CM Culross

Summerland House With No Steps

WJ Row

Tristate

Ashbourne Hills Avocados

Bonyaricall Vineyards

Chinoola Orchards

Chislett Farms Pty Ltd

Golden Hill Packing Pty Ltd

KV & JM Lehmann

Marrbiz Pty Ltd

Vitor Marketing Pty Ltd

Western Australia

Advance Packing & Marketing Services P/L

Avonova

Avowest

Box Organics

Delroy Orchards

Green Pear Avocado

Mariners Rest

The Avocado Grove

VP & EA Farrell

West Aussie Avos

Willow Creek

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