



INFOCADO CROP FORECAST

Quarterly Report— April 2013

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 Apr 12 to Mar 13 (5.5 kg eqv trays) - from quarterly report April 12

	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	12 Mth Total
Hass	462,697	1,242,795	1,068,864	753,137	791,481	720,572	698,792	691,914	801,291	571,188	399,960	103,041	8,305,732
Shepard	414,251	34,113	1,235	0	1	0	4,706	4,000	4,706	6,553	210,261	729,694	1,409,520
Other	36,014	68,259	53,941	108,166	118,952	25,759	10,921	11,000	9,765	53,850	47,884	43	544,554
Total	912,962	1,345,167	1,124,040	861,303	910,434	746,331	714,419	706,914	815,762	631,591	658,105	832,778	10,259,806

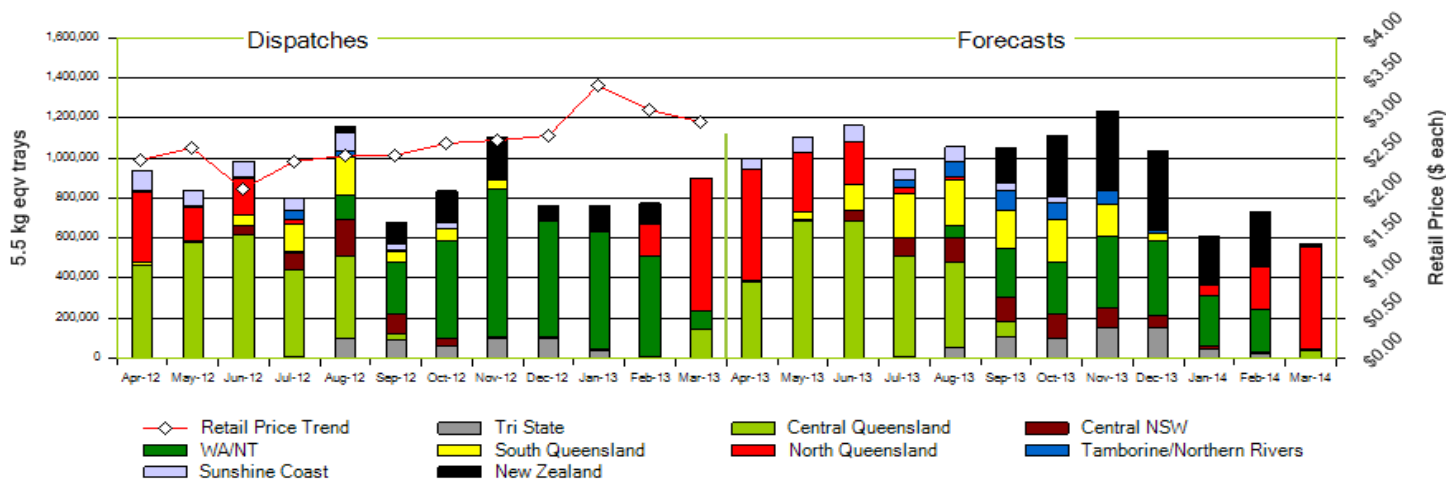
Australian Avocados Dispatches Apr 12 to Mar 13 (5.5 kg eqv trays)

	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	12 Mth Total
Hass	596,028	796,255	947,227	684,332	1,032,604	537,466	653,460	844,362	604,070	558,092	468,339	93,866	7,816,101
Shepard	267,177	12,880	190	0	0	0	0	0	0	7,836	164,917	800,895	1,253,895
Other	71,228	29,993	36,902	118,719	93,772	36,717	26,088	51,276	83,386	70,115	40,230	3,576	662,002
Total	934,433	839,128	984,319	803,051	1,126,376	574,183	679,548	895,638	687,456	636,043	673,486	898,337	9,731,998

Australian Avocados Forecast Apr 13 to Mar 14 (5.5 kg eqv trays)

	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	12 Mth Total
Hass	548,989	1,054,903	1,085,528	866,977	950,319	839,475	800,568	825,287	603,554	296,718	236,222	2,728	8,111,268
Shepard	423,841	9,930	20,014	19,477	19,874	12,930	0	0	0	48,547	214,050	543,516	1,312,179
Other	25,316	37,023	55,649	57,795	85,054	25,676	9,588	14,507	35,819	16,466	9,361	5,456	377,710
Total	998,146	1,101,856	1,161,191	944,249	1,055,247	878,081	810,156	839,794	639,373	361,731	459,633	551,700	9,801,157

Australian & New Zealand Avocados : Apr 12 to Mar 13 Dispatch / Apr 13 to Mar 14 Forecast



Apr 12 to Mar 13 Dispatches & Apr 13 to Mar 14 Avocado Production Estimates 5.5kg eqv trays

Region	Apr12 to Mar13	Apr13 to Mar14
North Queensland	1,573,311	1,870,969
Central Queensland	2,682,119	2,792,526
Sunshine Coast	476,710	418,100
Southern Queensland	540,808	1,215,667
Tamborine/Northern Rivers	103,624	382,587
Central NSW	479,622	703,715
Tri State	497,485	633,728
WA	3,378,319	1,783,865
Total	9,731,998	9,801,157

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.

Comments from the Infocado Team

NZ had been expecting a bumper 13/14 crop following the light 12/13 one but cooler temperatures around fruit set have proven problematic. Cold snaps were felt in some areas as late as November. For more information refer to The Orchardist, February 2013. Rain has also been scarce, which may impact fruit size.

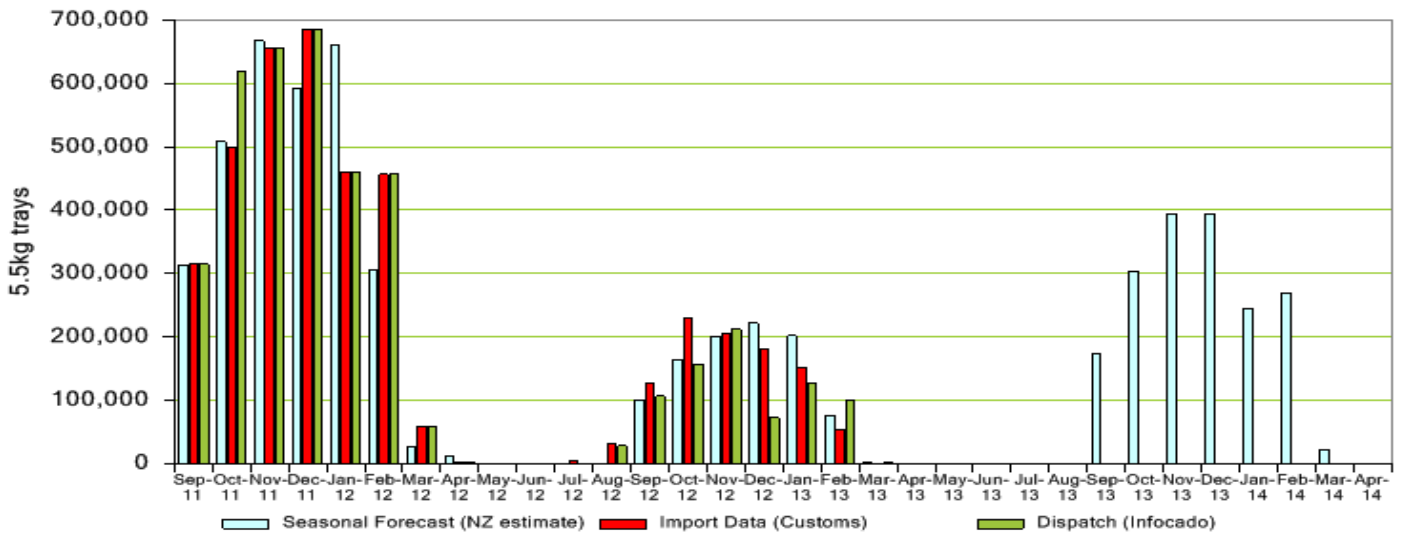
Shepard fruit size was an issue for NQ growers in past months but despite this prices have been good. The lack of Hass in the market in the last month has kept prices higher than normal for this time of year and has meant that the market place has been investigating more prominent promotion of other varieties to keep up with demand. Ongoing consumer and retailer education about green skin varieties is needed.

Research in 2012 showed that previous avocado marketing has been successful in expanding the usage of avocados, with consumers using avocados on average approximately 7 different ways. A new industry marketing campaign will be launched during 2013-14. The campaign has evolved from the rational message around versatility to focus on more emotive messages to drive consumption higher. The total marketing investment for 2013-14 will take account of production forecasts and therefore projected levy income.

As you can see from the table to the left, the WA forecast for the coming year is significantly lower than the dispatches over the last year. This is due to a series of hail storms from flowering onwards.

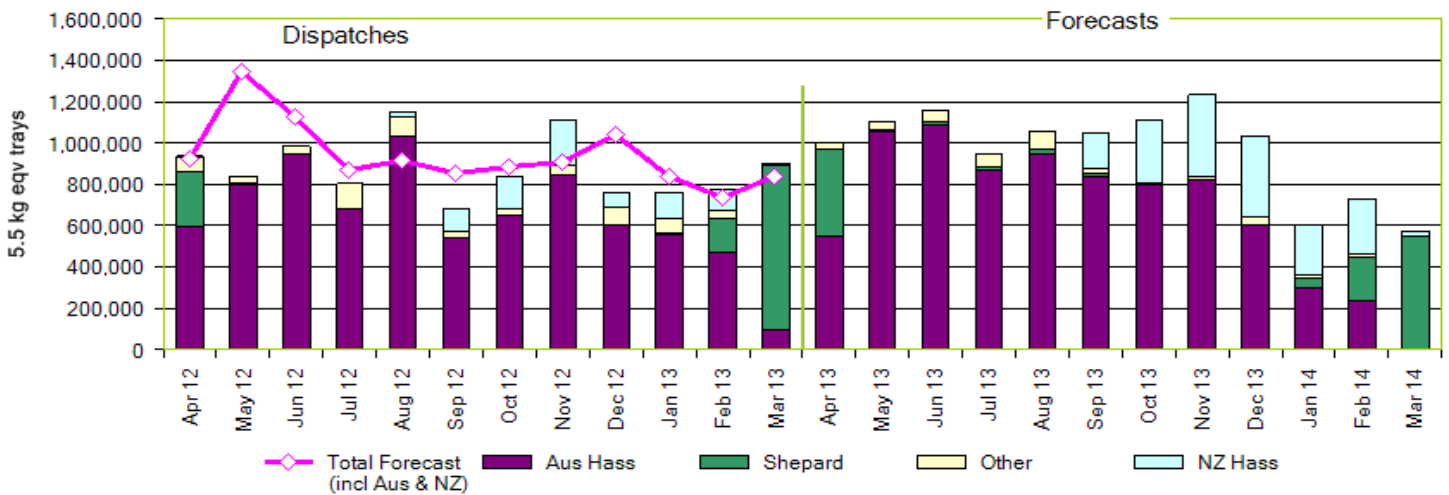
Supply into the Australian market from now until Dec is forecast to be significantly higher than the same period last year. This will require very disciplined marketing to ensure supply doesn't outstrip demand.

New Zealand Avocados - Dispatch and Forecast



NB: NZ Dispatch (Infocado data) in the graph above were not available for Nov 11 to Apr 12 therefore Customs data has been inserted in its place for this report

Apr 12 to Mar 13 Dispatches & Apr 13 to Mar 14 Forecasts Avocados by Variety



NB: NZ Dispatch figures in this graph are from Infocado and Customs data. The total forecast line (pink line) in the chart above illustrates the most up to date forecasts. ie. The Oct 11 figure comes from the forecast made in Sep 11 and the Nov 11 figure comes from the forecast made in Oct 11.

Seasonal Forecast Contributors

Advance Packing & Marketing Services P/L	Chinoola Orchards	Jirel Holdings	Sunny Bluff Produce Pty Ltd
Ashbourne Hills Avocados	Chislett Developments Pty Ltd	Kulnura Ambrosia Avocados	Sunnyspot Packhouse Pty Ltd
Aussie Orchards Growers & Packers	Chris and Sue Allan	KV & JM Lehmann	SuperPak
Avocado Estates	Coastal Avocados	Lava Valley Produce	The Avocado Grove
Avocado Industry Council (NZAGA)	Delroy Orchards	Lavers Orchards	The I & R Philpott Family Trust
Avocado Ridge	Donovan Family Investment Trust	LD & PM Burns	Tinaroo Falls Avocado Trust
Avonova	G & C Christensen	Lone Gum Avocados	Touchwood Farming
Avowest	G & J Krenske	Mariners Rest	Tropicado Avocados
B & F Sanderson Farming	Googa Farms	Midcoast Avocados	Vitor Marketing Pty Ltd
Balmoral Orchard	Green Nugget Orchards	Mountain Fresh	VP & EA Farrell
Battistin Orchards Pty Ltd	Green Pear Avocado	Natures Fruit Company	West Aussie Avos
Bellview Orchards Pty Ltd	Gunnado Farm	Perseverance Farming Co	Willow Creek
Blushing Acres Pty Ltd	Hilltop Mareeba	R & M Waterman	WJ Row
Box Organics	I & A Tolson	Simpson Farms Pty Ltd	Wodonga Park Fruit and Nuts
BT & RG Pegg	ID & AM Leighton	Summerland House With No Steps	
C F Fechner	JB & CM Culross	Sunfresh	

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