



INFOCADO CROP FORECAST

Quarterly Report— January 2014

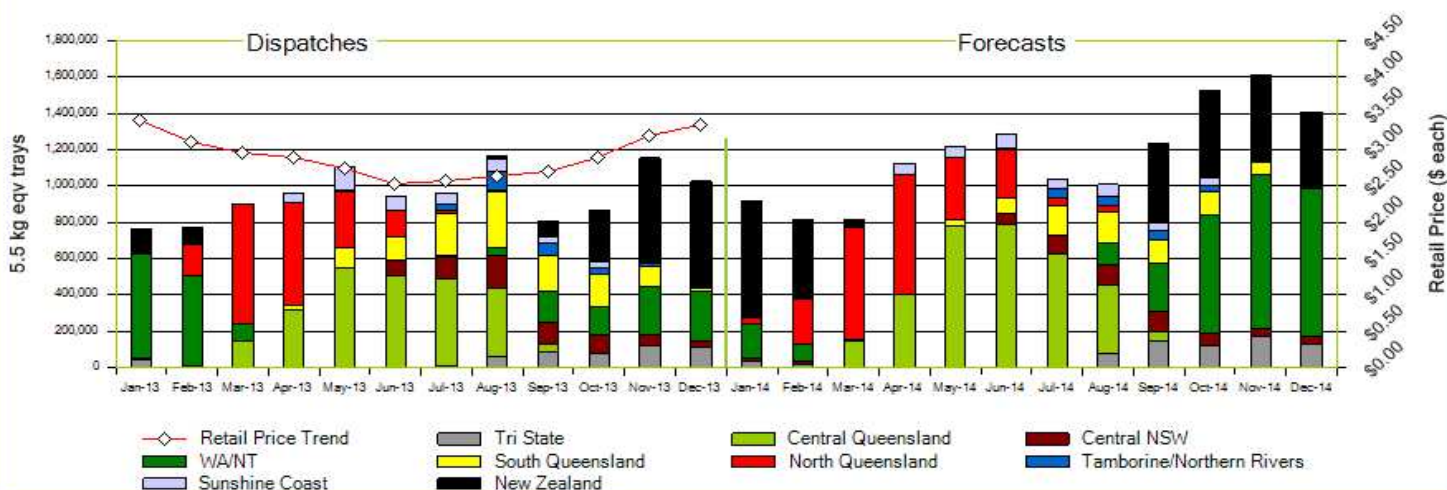
Welcome to the quarterly Infocado report. This report is released in the months January, April, July and October. Each report shows the previous 12 month's dispatch figures and the future 12 month's forecast figures including both Australian and New Zealand data.

Australian Avocados Forecast Jan 13 to Dec 13 (5.5 kg eqv trays)													
	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	12 Mth Total
Hass	571,188	399,960	103,041	548,989	1,072,225	1,089,475	811,652	784,546	711,551	636,026	574,844	408,694	7,712,191
Shepard	6,553	210,261	729,694	423,841	9,908	0	0	0	0	0	0	0	1,380,257
Other	53,850	47,884	43	25,316	38,724	55,715	36,477	105,875	24,825	12,324	47,815	45,884	494,732
Total	631,591	658,105	832,778	998,146	1,120,857	1,145,190	848,129	890,421	736,376	648,350	622,659	454,578	9,587,180

Australian Avocados Dispatches Jan 13 to Dec 13 (5.5 kg eqv trays)													
	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	12 Mth Total
Hass	558,092	468,339	93,866	184,271	959,283	906,702	927,713	1,036,076	686,666	567,800	563,360	391,732	7,343,900
Shepard	7,836	164,917	800,895	739,882	89,869	753	0	0	0	0	0	0	1,804,152
Other	70,115	40,230	3,576	32,850	58,352	31,487	31,873	112,315	32,860	11,018	8,503	46,766	479,945
Total	636,043	673,486	898,337	957,003	1,107,504	938,942	959,586	1,148,391	719,526	578,818	571,863	438,498	9,627,997

Australian Avocados Forecast Jan 14 to Dec 14 (5.5 kg eqv trays)													
	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14	12 Mth Total
Hass	224,524	110,745	32,559	562,951	1,124,098	1,219,731	990,211	924,436	773,284	1,034,348	1,120,161	939,065	9,056,113
Shepard	31,355	251,955	738,827	550,738	41,512	32,510	0	0	0	0	0	0	1,646,897
Other	13,957	17,804	6,129	7,851	50,073	30,601	50,376	84,497	22,593	6,707	13,152	48,259	351,999
Total	269,836	380,504	777,515	1,121,540	1,215,683	1,282,842	1,040,587	1,008,933	795,877	1,041,055	1,133,313	987,324	11,055,009

Australian & New Zealand Avocados : Jan 13 to Dec 13 Dispatch / Jan 14 to Dec 14 Forecast



Jan to Dec 13 Dispatches & Jan to Dec 14 Avocado Production Estimates 5.5kg eqv trays

Region	Jan to Dec 13	Jan to Dec 14
North Queensland	1,875,832	2,248,488
Central Queensland	2,417,391	3,165,152
Sunshine Coast	456,663	407,902
Southern Queensland	1,312,199	780,130
Tamb/Northern Rivers	260,123	199,933
Central NSW	713,896	572,536
Tri State	499,101	699,789
WA	2,092,792	2,981,079
Total	9,627,997	11,055,009

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

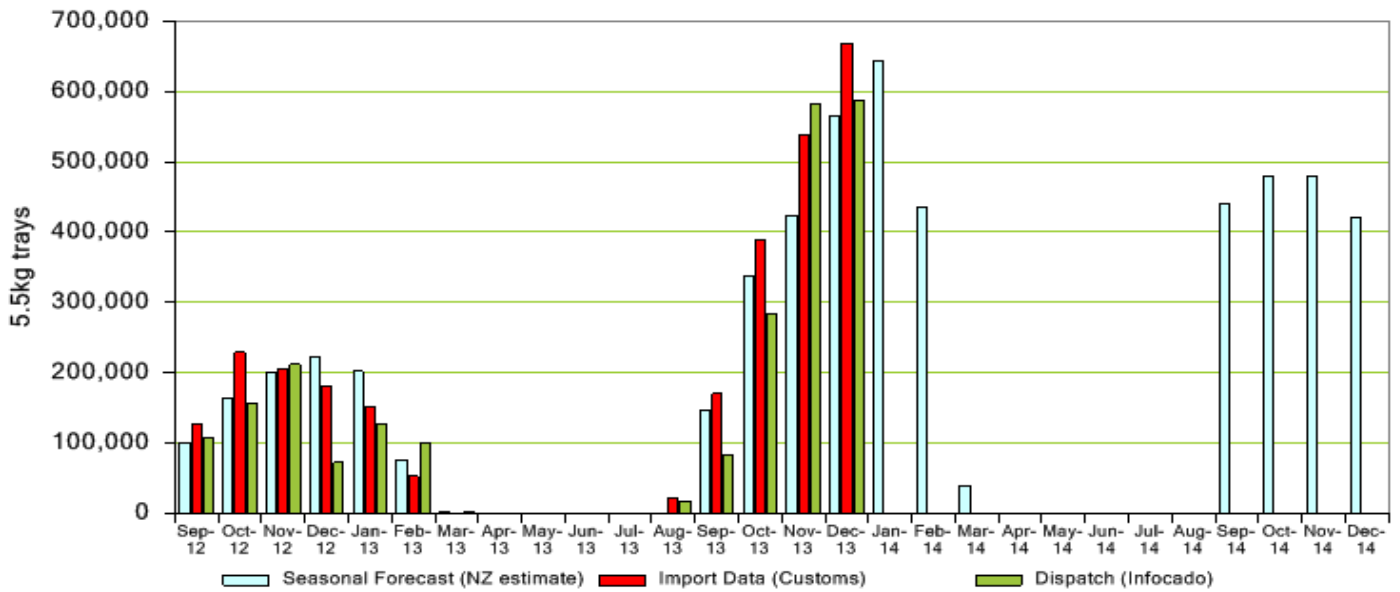
After a year of modest supply and therefore strong prices, volumes from a number of major growing regions are forecast to increase significantly in 2014. This will mainly affect volumes from April onwards. Western Australia especially is set to have a very big season which is not fully captured in this quarterly report (with the first few months of 2015 not included in the figures). Coupled with a large crop expected in New Zealand, the forecast for the summer period is much higher than 2013/14 and volumes that will exceed 2011/12. Having said this, the recent heat wave in Southern States may have an impact on next seasons production—especially in the Tristate region. The full implications will be captured more fully in the next 2 quarterly reports.

The levy-funded marketing program will launch the new Television Commercial with a burst of activity to coincide with increasing supplies in March-April. Actual timing of the campaign for 2014 will be agreed with the HAL Industry Advisory Committee (IAC) at their February meeting. The forecast supplied in this report will play a significant role in assisting the IAC with these decisions, so as to ensure good volumes of quality fruit are available to consumers when the promotion bursts occur. Accurate updating throughout the year will assist with fine tuning the campaign timing.

For those who are unaware, Jo Embry is finishing up with AAL at the end of February. "I would like to take this opportunity to thank all the packhouses and wholesalers who have contributed to Infocado over the past 8 years for their support in making the Infocado program so successful and a tool that is envied throughout the horticulture industry. It is important to remember that the information that comes out can only be as good as the information that goes in! Good luck and please continue to support the system into the future."

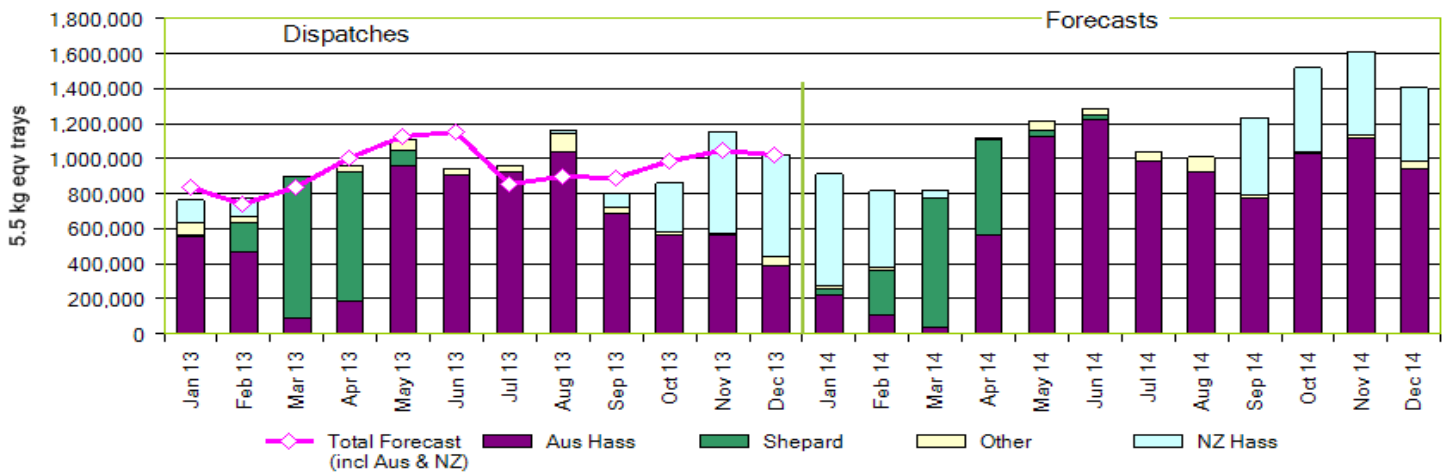
AAL would like to thank Jo for all her great work and wishes her all the very best with her future endeavours.

New Zealand Avocados - Dispatch and Forecast



NB: the NZ estimate for 14/15 is currently only available up to Dec 14. The full estimate will be included in the April Quarterly Report

Jan 13 to Dec 13 Dispatches & Jan 14 to Dec 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 13 figure comes from the forecast made in Sep 13 and the Nov 13 figure comes from the forecast made in Oct 13.

Seasonal Forecast Contributors

Central NSW

Barham Avocados
Coastal Avocados
I & A Tolson
Kulnura Ambrosia Avocados
Midcoast 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

NZ

Avocado Industry Council (NZAGA)

North Qld

Avocado Estates

Aussie Orchards Growers & Packers

Battistin Orchards Pty Ltd

Bellview Orchards Pty Ltd

Gunnado Farm

Hilltop Mareeba

Lavers Orchards

Lone Gum Avocados

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 & 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

Bonyarical Vineyards

Chinoola Orchards

Chislett Developments Pty Ltd

Goldenhill Packing

KV & JM Lehmann

LD & PM Burns

Marrbiz Pty Ltd

Vitor Marketing Pty Ltd

WA

Advance Packing & Marketing Services P/L

Avonova

Avovest

Box Organics

Delroy Orchards

Green Pear Avocado

Mariners Rest

The Avocado Grove

VP & EA Farrell

West Aussie Avos

Willow Creek

For more detailed reports please go to www.avocado.org.au and login to Infocado. Instructions on accessing reports are available at www.avocado.org.au by clicking on the Industry tab and then looking under services.

For further assistance please contact: Julie Petty, Ph: 07 3846 6566, Email: infocado@avocado.org.au