



Quarterly Infocado Report

Crop Forecast - April 2018

Avocados Australia releases four quarterly Infocado crop forecast reports per year, in the months January, April, July and October.



Australian avocado production forecast April 2017 to March 2018 (in 5.5 kg eqv trays, does not include NZ fruit)

| | Apr 17 | May 17 | Jun 17 | Jul 17 | Aug 17 | Sep 17 | Oct 17 | Nov 17 | Dec 17 | Jan 18 | Feb 18 | Mar 18 | 12 Mth Total |
|--------------|------------------|------------------|------------------|------------------|------------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|-------------------|
| Hass | 442,227 | 1,433,386 | 1,503,645 | 1,059,602 | 1,190,565 | 971,598 | 857,237 | 853,420 | 867,428 | 666,936 | 335,027 | 86,724 | 10,267,795 |
| Shepard | 774,424 | 78,420 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5,200 | 429,188 | 1,356,360 | 2,643,592 |
| Other | 24,615 | 36,662 | 35,963 | 44,360 | 38,521 | 4,706 | 3,727 | 16,265 | 29,908 | 41,730 | 2,000 | 4,710 | 283,167 |
| Total | 1,241,266 | 1,548,468 | 1,539,608 | 1,103,962 | 1,229,086 | 976,304 | 860,964 | 869,685 | 897,336 | 713,866 | 766,215 | 1,447,794 | 13,194,554 |

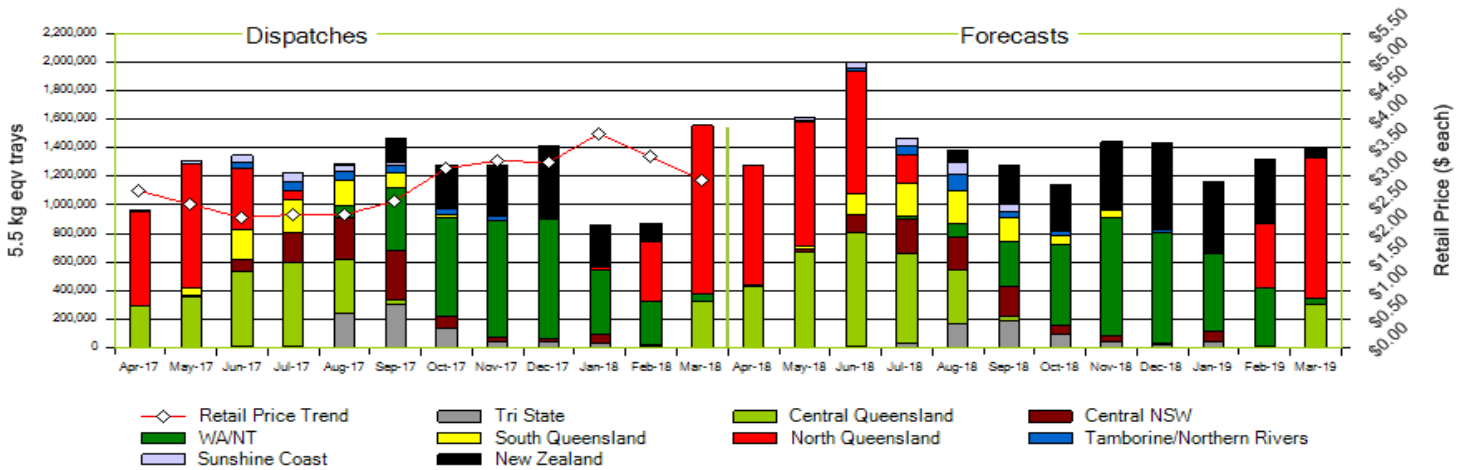
Australian avocado production April 2017 to March 2018 (in 5.5 kg eqv trays, does not include NZ fruit)

| | Apr 17 | May 17 | Jun 17 | Jul 17 | Aug 17 | Sep 17 | Oct 17 | Nov 17 | Dec 17 | Jan 18 | Feb 18 | Mar 18 | 12 Mth Total |
|--------------|----------------|------------------|------------------|------------------|------------------|------------------|----------------|----------------|----------------|----------------|----------------|------------------|-------------------|
| Hass | 383,278 | 1,254,784 | 1,315,176 | 1,181,865 | 1,206,950 | 1,259,397 | 914,763 | 900,542 | 882,672 | 492,065 | 314,168 | 166,142 | 10,271,802 |
| Shepard | 563,708 | 17,218 | 305 | 31 | 90 | 0 | 0 | 0 | 0 | 21,517 | 426,856 | 1,381,889 | 2,411,614 |
| Other | 20,040 | 39,544 | 31,560 | 44,531 | 67,200 | 39,564 | 55,100 | 21,386 | 25,101 | 57,048 | 7,342 | 9,233 | 417,649 |
| Total | 967,026 | 1,311,546 | 1,347,041 | 1,226,427 | 1,274,240 | 1,298,961 | 969,863 | 921,928 | 907,773 | 570,630 | 748,366 | 1,557,264 | 13,101,065 |

Australian avocado production forecast April 2018 to March 2019 (in 5.5 kg eqv trays, does not include NZ fruit)

| | Apr 18 | May 18 | Jun 18 | Jul 18 | Aug 18 | Sep 18 | Oct 18 | Nov 18 | Dec 18 | Jan 19 | Feb 19 | Mar 19 | 12 Mth Total |
|--------------|------------------|------------------|------------------|------------------|------------------|------------------|----------------|----------------|----------------|----------------|----------------|------------------|-------------------|
| Hass | 609,844 | 1,566,116 | 1,960,568 | 1,403,029 | 1,251,835 | 1,004,051 | 809,521 | 963,047 | 806,196 | 582,258 | 412,826 | 96,121 | 11,465,412 |
| Shepard | 649,104 | 22,091 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9,129 | 446,740 | 1,223,884 | 2,350,948 |
| Other | 16,915 | 18,962 | 34,227 | 66,828 | 49,347 | 3,175 | 9,189 | 13,749 | 17,496 | 76,160 | 3,704 | 5,862 | 315,614 |
| Total | 1,275,863 | 1,607,169 | 1,994,795 | 1,469,857 | 1,301,182 | 1,007,226 | 818,710 | 976,796 | 823,692 | 667,547 | 863,270 | 1,325,867 | 14,131,974 |

Australian & New Zealand Avocados : Apr 17 to Mar 18 Dispatch / Apr 18 to Mar 19 Forecast



Quarterly avocado supply summary (incl NZ) in 5.5kg eqv trays

| Region | Apr17 to Mar18 | Apr18 to Mar19 |
|--------------------|-------------------|-------------------|
| North Qld | 3,635,307 | 4,195,233 |
| Central Qld | 2,494,492 | 3,235,760 |
| Sunshine Coast | 214,116 | 267,542 |
| South Qld | 804,023 | 911,698 |
| Tamorine/ N.Rivers | 308,099 | 309,371 |
| Central NSW | 1,162,414 | 1,026,825 |
| Tri State | 812,198 | 590,951 |
| WA | 3,670,416 | 3,594,594 |
| New Zealand | 1,763,858 | 2,779,886 |
| Total | 14,864,923 | 16,911,860 |

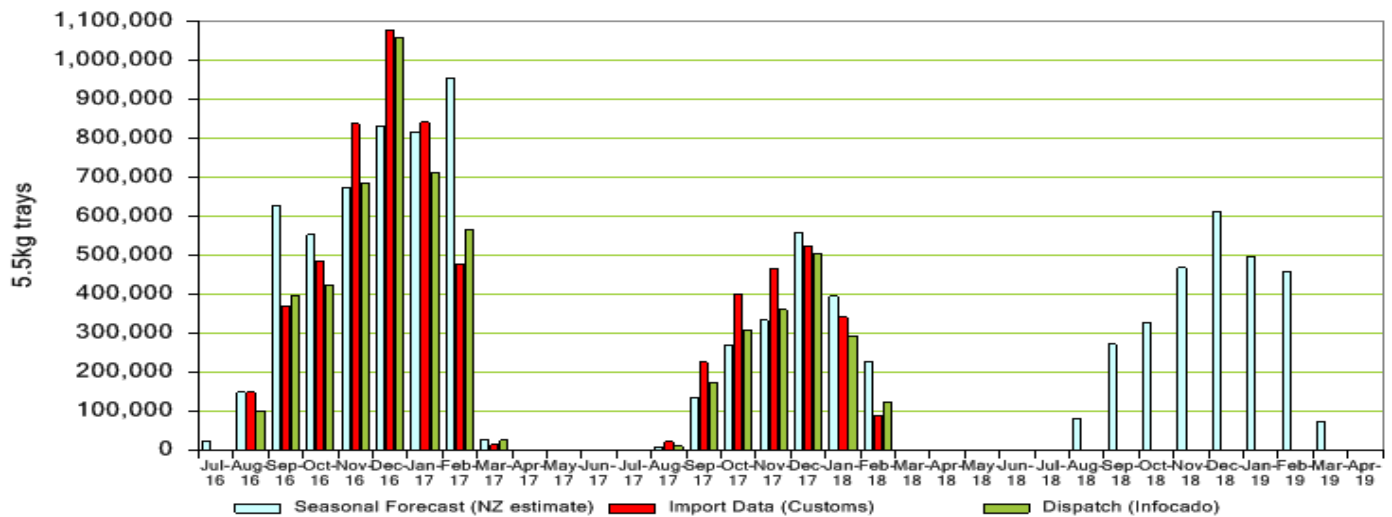
Report notes:

The Quarterly Infocado report is compiled using data collected through the Infocado system from an estimated 85% of industry packhouses, consolidators and wholesalers. This report incorporates an allowance (by region) for the data which is not contributed to the Infocado system. It is thus, not possible to extrapolate the figures from Weekly Infocado reports (which use unadjusted data) to those in Quarterly Infocado reports. This report is provided initially to Infocado contributors only. Until public release, the report is confidential.

Comments

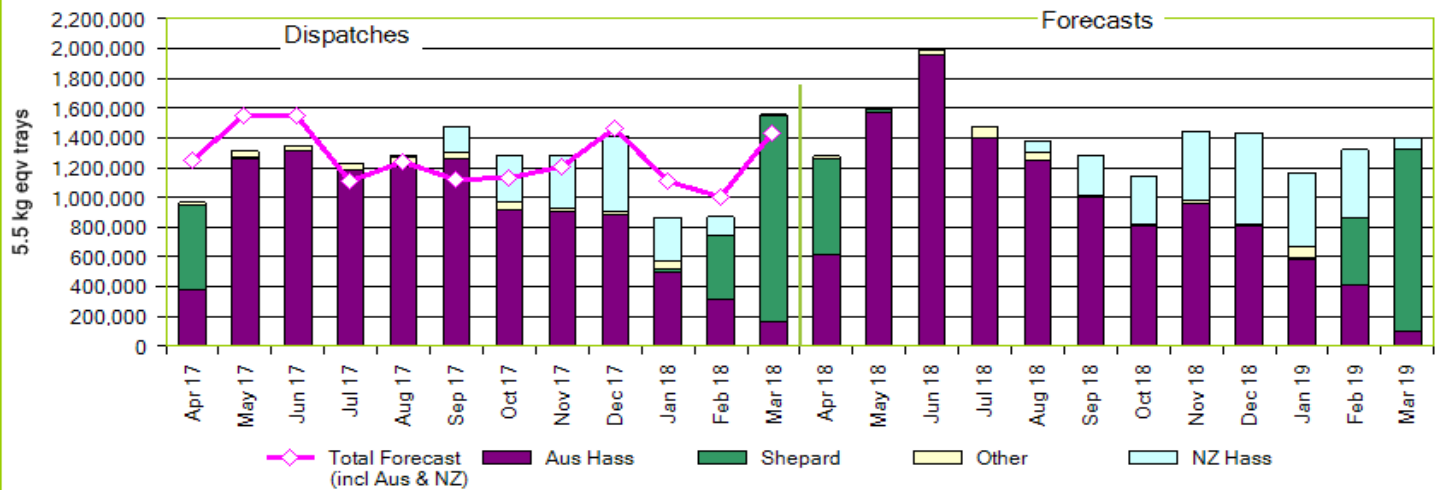
- Australian grown avocado supply from January to March (Q1) 2018 was 3 million trays, with total supply at 3.4 million trays, including approx. 0.4 million trays from NZ.
- Australian fruit volumes were higher than the same quarter last year by 42%, while New Zealand's Q1 saw a decrease of 68% on Q1 2017. To some extent this was forecast, with NZ expecting their off year. The net result was a 5% increase across the three months compared with 2017.
- The dramatic (38%) reduction in avocado supply in January compared to December caused a flurry of media enquiries and social media commentary. Good to know the people need their avos! NZ picking was delayed in early January due to rain, and many packhouses had a well deserved few days off at the time. These factors combined with high consumer interest led to what one publication called "The Great Avocado Shortage of 2018". Oh the drama!
- NZ Avocado provided this summary of their 2017/18 season and 2018/19 forecast: "A low volume season for the New Zealand crop coupled with increasing consumer demand resulted in high average per tray values for New Zealand avocados sold in Australia in the 2017-18 season. A 60% increase in total export volumes from New Zealand to all markets is forecast for the 2018-19 season."
- Forecasts for the next 12 months indicate overall increased supply. May and June are predicted as the peak supply months for the coming 12 months, with smaller peaks following in Nov/Dec.

New Zealand Avocados - Dispatch and Forecast



Note: Source of import data is ABS and/or NZ Infoshare (NZ govt customs data) depending on availability. Dec 2017 customs data not available at time of report.

Apr 17 to Mar 18 Dispatches & Apr 18 to Mar 19 Forecasts Avocados by Variety



Note: NZ dispatch figures in the above graph are from Infocado, the total forecast line (pink) indicates the most up to date forecasts.

Seasonal forecast contributors

Central NSW

Coastal Avocados
I & A Tolson
Midcoast Avocados

Central Qld

BT & RG Pegg
Costa Avocados/Superpak
Donovan Family Investment Trust
Lava Valley Produce
Simpson Farms Pty Ltd
Sunny Bluff Produce Pty Ltd

New Zealand

Avocado Industry Council (NZAGA)

North Qld

Aussie Orchards Growers & Packers
Avocados with Altitude
Battistin Orchards Pty Ltd
Bellview Orchards Pty Ltd

Cobra Hill Orchards

Costa Avocados/Avocado Estates
Golden Triangle Avocados
Green Skin Avocados

Gunnado Farm

Manbulloo Ltd

Koci Avocado's

Rockridge Farming Pty Ltd

Tinaroo Falls Avocado Trust

Ferraro Farming (was Tropicado Avocados)

South Qld

Balmoral Orchard

G & J Krenske

Googa Farms

Green Nugget Orchards

Mountain Fresh

Perseverance Farming Co

Sunnyspot Packhouse Pty Ltd

Touchwood Farming

Wodonga Park Fruit and Nuts

Sunshine Coast

Natures Fruit Company

Sunfresh

Tamborine / Northern Rivers

Aussie Orchards Growers & Packers

Jirel Holdings

Merrinee Farm

T W Silver

WJ Row

Zhong Sheng Pty Ltd

Tristate

Barham Avocados

Chinoola Orchards

Chislett Farms Pty Ltd

Golden Hill Packing Pty Ltd

J.G. Loffler

Klingbiel Family Trust

KV & JM Lehmann

Marrbiz Pty Ltd

Mildura Fruit Company

Sunvale Produce Pty Ltd

Western Australia

Advance Packing & Marketing Services P/L

Avonova

Avowest

Delroy Orchards

Golden Hill Avocados

Green Pear Avocado

Mariners Rest

The Avocado Grove

VP & EA Farrell

West Aussie Avos

Willow Creek

Infocado information is available at www.avocado.org.au/our-programs/supply-chain-data/infocado/ or contact us at infocado@avocado.org.au

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