

State of the Industry: Australia



Antony Allen Avocados Australia

Overview

- Last 5 years
- As at 2009
- Into the future



Where have we come from in the last 5 years?

- Large scale growth since 2003:

65%

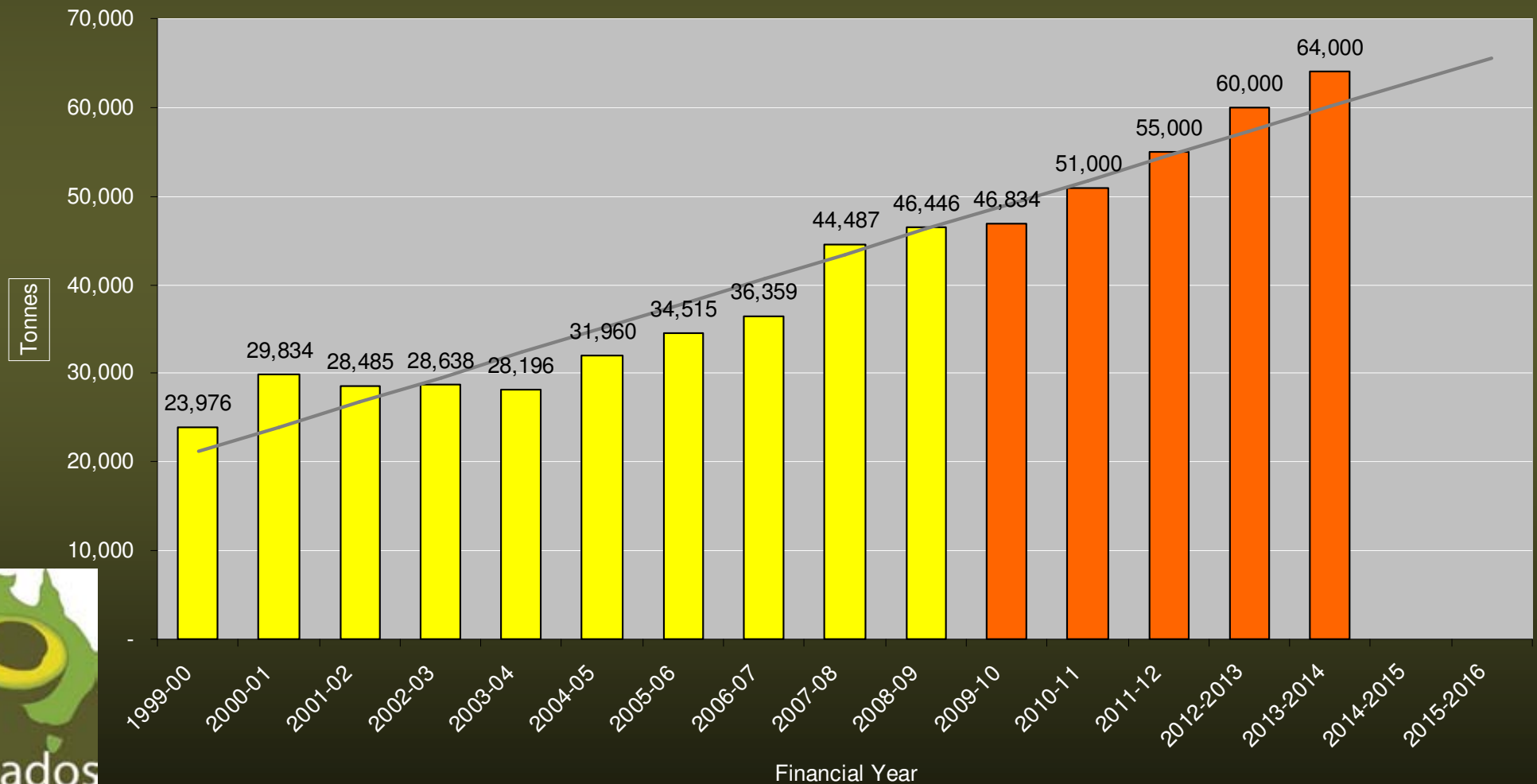


Australian Production Area



Where have we come from in the last 5 years?

Growth in Australian Avocado Production 1999 to 2009 and Estimated to 2013



(Source: Infocado, ABS, Levy Receipts (est for 2009-2013))

Where have we come from in the last 5 years?

- Structural change
 - Orchard size
 - Timbercorp changes
 - Supermarket changes
- Global adjustment
 - Market expansion
 - Market access



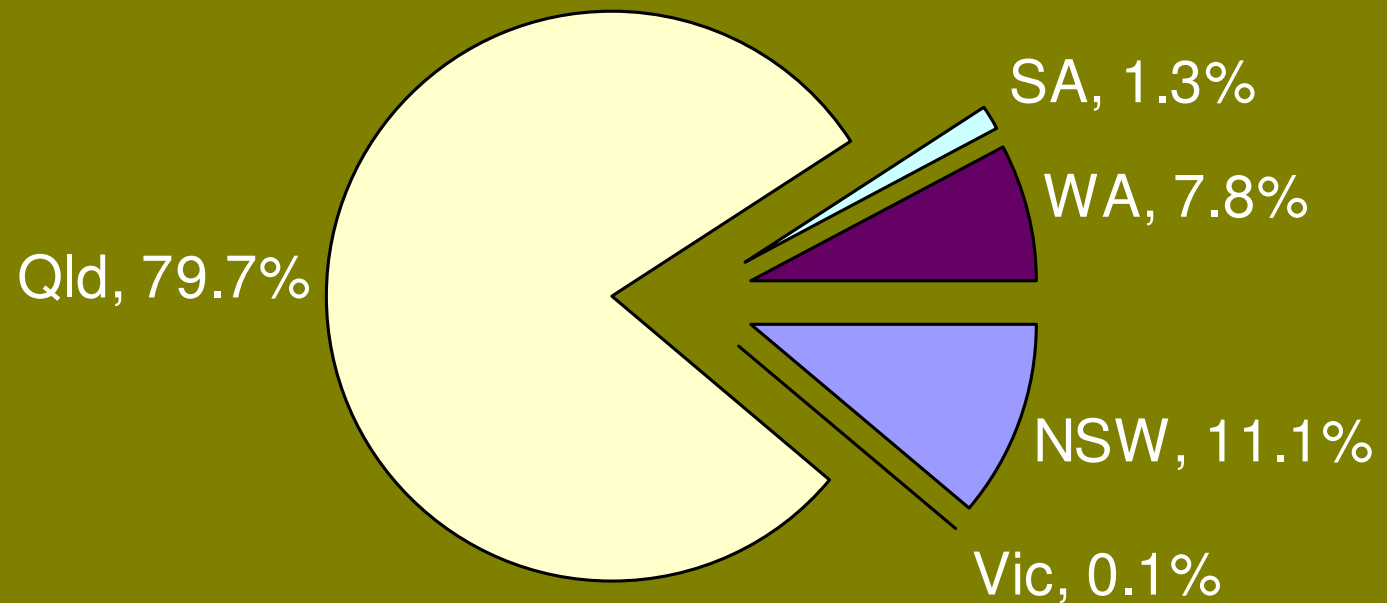
Australian Industry

- 1100 growers
- 2008-09 Levy, Infocado and ABS data
 - Production 46,500 t
 - GVP \$130 million
 - Trees - 1,504,000 approx
 - 5,488 ha approx
 - 34% of trees under 6 years old
- 2009-10 estimate 46,500 t



State Production Breakdown

Production Percentage by Australian State



Through who to the consumer?

- Supermarket: 52%
- Independents: 29%
- Food Service: 15%
- Export: 4%

Consumption pattern

- USA: 1.4 kg/person/year
- Australia: 2.8 kg/person/year
- Chile: 3.5 kg/person/year
- Mexico: 7.4 kg/person/year



Data source: BIS Shrapnel, Project Pulse, Infocado, Customs, Avocados Australia, USDA and ABS

In 2009

- Communications Program
- Infocado and crop forecasting
- R&D Program
- Promotions and Marketing Program
- Strategic Alliances



In 2009

- Climate Change
- Food Security
- Horticulture Awards Modernisation
- Global Economic Situation
- Bio Security



The future for Australian Avocados

- Growth in production
- Exports
- World consumption growth
- Commercial linkages
- Quality is KEY
- Overall positive future



Summary

- Cohesive, strategic long term promotion and R&D objectives and a program to deliver them
- Constant improvement of communications and access to information
- Relationship building



Thank You

