National Infocitrus Development Project

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Citrus Australia Limited

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CT09034

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HAL Project CT09034 (June 2013)
National InfoCitrus Development Project

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Statement of purpose:
This report describes the implementation of the National InfoCitrus Development project and the outputs and outcomes generated. It gives recommendations for the future collection of production figures and the format of industry data that is most sought after by industry stakeholders across the supply chain.

Funding:
This project has been funded by HAL using the national citrus levy and matched funds from the Australian Government.

Contents

Media Summary

The citrus industry has identified the need for nationally coordinated data collection to create a better informed industry, thus allowing more informed business decisions. The *CT09034 National InfoCitrus Development Project* delivered weekly reports of national citrus dispatches from all major growing regions to all market destinations in Australia and to export markets. This dispatch data is a valuable resource for growers, packers, marketers and industry representatives alike and can be used in day to day decision making or for long term strategic planning, both on farm, in market and across industry.

InfoCitrus is an online data exchange system that allows individual packing facility operators in the regions to enter citrus dispatch data from their farm or packhouse. The individual businesses' data are collated into a national aggregated report of citrus production and supply estimates. The aggregated data are used by contributors and industry in general for improved varietal, supply, marketing, operational and strategic business decision-making. InfoCitrus historical data provides a framework to analyse seasonal supply and demand, target production windows, focus market access efforts and build the industry's profile.

The *CT09034 National InfoCitrus Development Project* was successful in its goal to implement InfoCitrus in all of the five main citrus growing regions of Australia (Queensland, Sunraysia, Riverina, South Australia and Western Australia) and has maintained its stated aim of achieving a minimum participation rate of 80% of volume in each region.

InfoCitrus was designed to provide national data that the industry and Citrus Australia could build on to improve knowledge of:
- Seasonal citrus supply;
- Price impacts of over or under supply;
- Supply and market/industry vulnerabilities; and
- Plantings and harvest rate data.

National InfoCitrus reports have provided data for many industry representations including to DAFF for the purpose of proving a need for action on certain market access issues. National InfoCitrus reports have been used in various national industry meetings such as the Citrus Australia 2011 Export Marketing Forum, the Citrus Australia 2011 National Conference, the 2012 Export Marketing Forum and the 2012 Citrus Australia National Conference. National InfoCitrus reports are used at Citrus Australia's Domestic Market, Export Market and Varieties committees to guide strategic planning.

InfoCitrus historical reports have been used by growers to determine opportunities in production windows for their region and to further justify changes in variety mix on their properties. InfoCitrus has been used to confirm or refute market intelligence that has suggested oversupply of product in both the domestic and export market.

Overall the industry has engaged with the project and has developed many uses for the information it generates.

Introduction

Citrus Australia and its prior structure Australian Citrus Growers Incorporated identified information management and communication as major priorities for the industry within the strategic and structural plans. The citrus Industry Development Needs Assessment (IDNA) identified the importance of information management for the industry and InfoCitrus was seen

as a key plank in the provision of timely reliable production data to the Australian citrus industry.

CT09034 National InfoCitrus Development Project aimed to continue the development and rollout of the internet based citrus data exchange system called InfoCitrus. *CT09034* built on previous HAL projects *CT05024 Citrus Information Exchange System* (2006-07) and *CT07053 InfoCitrus Stage 2* (2008-09). Whilst both the earlier projects aimed to develop a national exchange system, for various reasons including drought, agri-politics, poor grower returns and under resourcing of the projects, ultimately only Queensland packers remained involved by the completion of project *CT07053 InfoCitrus Stage 2*.

The *CT09034 National InfoCitrus Development Project* project successfully rolled out InfoCitrus to the major southern Australian citrus growing regions of Sunraysia, the Riverland, the Riverina and Western Australia, whilst ensuring the ongoing improvement and development of the InfoCitrus system in Queensland.

Citrus Australia's Manager of Market Information and Quality built capacity in each region, working one on one with packing shed staff and business owners across Australia to build knowledge, incentive and efficiency into the use and reporting of InfoCitrus.

Citrus Australia has incorporated changes to InfoCitrus to suit users, created new reports and developed new modules as industry has refined the type of data and delivery it requires.

InfoCitrus is an online data exchange system that allows individual packing facility operators in the regions to enter citrus dispatch data from their farm or packhouse which is collated into a national aggregated report of citrus production and supply estimates. The aggregated data is used by contributors and industry in general for improved varietal, supply, marketing, operational and strategic business decision-making. InfoCitrus historical data provides a framework to analyse seasonal supply and demand, target production windows, focus market access efforts and build the industries profile.

Method

This section will describe both the InfoCitrus system and the methods used to achieve a national rollout of the InfoCitrus system.

Engaging industry

CT09034 National InfoCitrus Development Project was tasked with engaging the national citrus industry, focusing on five growing regions; Central Burnett Queensland, Sunraysia Victoria, Riverina New South Wales, Riverland South Australia and the Midlands and Peel districts of Western Australia. Each of these regions had varying levels of exposure, acceptance and use of the system. Each region varied in its state of advancement and its existing systems and methodologies for citrus data collation and dissemination - particularly state levy mechanisms. No other existing system sought to provide a national perspective of the industry.

Citrus Australia employed Nathan Hancock as Manager of Market Information and Quality in February 2011. Resourcing this role was a key strategy for the success of *CT09034 National InfoCitrus Development Project* as it allowed packers to form a relationship with someone behind InfoCitrus - a face to the project that understood the industry and its issues. The Manager of Market Information employed a number of strategies to engage industry: one to one meetings, public meetings and communication through industry magazines and newsletters.

User information was developed after discussions with Queensland contributors to help show the benefits of InfoCitrus and the potential power of the information that could be generated. The key was to engage the business owner at that level and then find the right person in the organisation to enter the data and make it their responsibility.

In the tri state area there was a common objection that the data required for InfoCitrus was already being given to the state boards for levy calculations. It was important to make a distinction between the two needs for the information and show why a national production report was equally if not more important than the levy data. The significant advantages InfoCitrus had were timeliness and online data entry as well as the various types of national report that could be generated. Some boards generated similar data but often with extreme delays and only regionally specific.

The system is relatively easy to operate and training staff to enter the data does not take long. Spending time building relationships with the packers and their staff to the point that they saw value in InfoCitrus or the relationship took longer.

The InfoCitrus system was adapted from Infocado which meant it bought with it some functions and reports that were irrelevant to citrus growers, and then because of its adoption by the Queensland mandarin region it became skewed to mandarin growers. As more orange packers became involved it became clear that some functions of InfoCitrus needed to be overhauled and these changes added value to the interaction with packers and improved the system at the same time.

Whilst it was a stated goal of the project to build strong relationships between Citrus Australia and each of the regional boards it was soon evident that the goals of the organisations did not align and the political climate at that time dictated that this was not possible.

After the first pre-season packer meetings and speaking engagements, packers were encouraged to keep up their use of the system via the following methodologies: -

1. Pre-season and within season introductions (when necessary) information delivery via email and phone, reminders on the processes, key dates, benefits and support for entry of data to the InfoCitrus system;
2. Pre-season and within season information on InfoCitrus via training support and information days within their local region or one on one training sessions;
3. Post season round-up of results to contributors;
4. Improved incentive building for potential contributors to supply data via making processes easier, providing process information regularly, providing support channels, delivering better citrus data information and highlighting potential business advantages of use.

Participation

With input from industry, Citrus Australia had developed a key criterion that had to be met - reports would not be created unless 80% of volume by region agreed to participate in the system. Each region was consulted to determine what sheds must be targeted to achieve the level of participation required.

Each week contributors entered data for the previous week's dispatches and their four week estimates. Each contributor's data was checked off by the administrator and any inconsistencies brought to the attention of the contributor and corrected. If a contributor was late or failed to enter their data they were followed up. If a contributor failed to enter data two weeks in a row they did not receive the third weeks report.

Only regularly contributing packers and their growers received weekly reports. The wider industry received less detailed information in newsletters and through direct enquiry or at industry meetings. Detailed mid-season and end of season reports were available to all growers and packers regardless of whether they were contributors. Keeping the weekly data format for contributors only was seen as an incentive to contribute.

InfoCitrus system

Data collection

InfoCitrus is an online data exchange system that requires weekly input from citrus pack-houses (contributors) across Australia. The data is collated by the system and reports of the aggregated data are generated by the InfoCitrus administrator/s.

Each contributor has a unique, confidential username and password and their data is held on a secure server in Melbourne. Contributors can access their own data at any time but do not have access to any other contributor's data.

There is capacity for the system to collect data on the following:

1. Dispatches (production)
2. Estimated supply
3. Seasonal forecast - Packer
4. Seasonal forecast - Industry
5. Harvest rate

Dispatches - Data is entered by variety, pack size and market destination. A system was developed to allow packers with computerised packing lines to upload data through the creation of csv files - sheds with large capacity prefer this method as they usually have the systems to generate the data. In most cases an office administrator is responsible for the 'manual' upload of the data. In general the most difficult part of the process is collating the data from the packers' own systems. In some cases the data is faxed to the InfoCitrus administrator by the packer and entered on their behalf.

Estimated supply - A function exists which allows packers to enter the estimated supply for the next 4 weeks. Called a 4 week rolling forecast, the system carries forward the previous weeks estimate and asks for an update of the fourth week. The volume is recorded in tonnes and the report provides an estimate of the volume expected to be processed by all packers. In the event of heavy rain or other circumstance that affects harvest the estimate can be modified and updated at any time.

Seasonal forecast - Packer - The seasonal forecast by packer function is a pre-season planning tool which drills down to variety level. After the first season of using InfoCitrus each contributor's seasonal forecast is pre filled with last year's actuals and a comparison to last year's seasonal forecast (if one was supplied). The total of all seasonal forecasts contributed by packers can be collated and aggregated to produce a packer seasonal forecast.

Seasonal forecast - Industry - The industry seasonal forecast is used to show the top line forecast developed by industry. It is used in the reporting process to develop the harvest rate.

Harvest rate - The harvest rate is calculated from the dispatch data received against the volume predicted in the seasonal forecast.

Reporting capabilities
From the data supplied by contributors the InfoCitrus system is able to produce a range of graphs and tables that include:

1. Variety reports
2. Market destination
3. Comparisons of dispatches by variety by year
4. Comparisons of dispatches by market destination by year
5. Variety by origin
6. Comparison of dispatch to forecast
7. Total of dispatches by year
8. Exports by variety and destination
9. Dispatches by variety and origin regions or states
10. Estimates by variety
11. Harvest rate

We will not go in to detail here on each of the reports, but will highlight some of them. Examples of the weekly report and the types of end of season analysis produced by InfoCitrus are attached (Appendix 1 & 2).

Variety reports - This report can drill down from a category such as 'Mandarin' to specific varieties such as Imperial or Afourer. The varieties chosen are of significance to the industry - either because they are already of substantial volume or because they are an increasingly popular variety in terms of hectares planted. The report shows the shoulder of variety change in the market which can be a difficult period for marketers. Longer term planning is aided through this report as industry looks for windows in supply.

Market destination - This report shows what volume was sent to each of the major markets in Australia and the total export volume for the week. This information is useful to understand the effect of supply on demand. It has also revealed the size of the various domestic markets and the impact of poor export years on domestic supply.

Comparisons by year - This report shows previous seasons dispatches by variety and by market destination compared to the current season. This shows trends in the season and can indicate short or over supply in the market and can help predict the length of a season based on previous years. It will show overall changes in markets over time.

Exports by variety and destination - Balancing supply to export markets is critical due to the high risk of having product in transit for long periods. This report drills down to 23 export markets and provides unbiased information on supply to these destinations from Australia.

Results

CT09034 National InfoCitrus Development Project was effective in achieving its goals of 1) national participation; 2) at a minimum of 80% by volume in each region. Across the country Citrus Australia engaged with 80 packing sheds ranging in capacity from less than 2 tonnes per week to in excess of 2,000 tonnes per week. The result of this engagement was that during the peak of the season up to 60 pack houses contributed to InfoCitrus in 2012, representing over 85% of volume in each region.
Following the tough 2011 season, the 2012 season posed even greater financial stress for medium and small sized sheds - the result in many cases was a reduction of admin staff. This

impacted on InfoCitrus as entering the dispatch data was not a priority in these conditions. Where possible Citrus Australia obtained the raw data and entered it on behalf of the packers, however some sheds could not provide even the raw data. Overall the loss of these smaller sheds' data did not significantly affect the results produced by InfoCitrus.
The project was able to deliver its first national report on the 27th May 2011 (previous weeks had only included Queensland). Weekly reports continued until late into November when contributors dropped off to very low numbers as there was only a few sheds packing Valencias for the domestic market, and recommenced in 2012 with Imperial mandarins. This pattern has continued up to the writing of this report.

End of season reports were generated from InfoCitrus and were used at regional pre-season meetings to reflect on the season past. This data was enhanced through purchasing price data from Ausmarket Consultants. Overlaying the weekly prices on weekly dispatches showed the effect of volume in the market. For example, the Queensland industry determined that when volumes of Imperial mandarins exceeded 2000 tonnes per week grower returns were negatively impacted.

In 2010 imports of lemons reached an all-time high and severely impacted lemon growers in Queensland. Using InfoCitrus to develop a forecast of summer lemon production (based on years of actual production) and other data from the *MT10022Export Market Intelligence* and subsequent *MT12009Export Market Intelligence* projects Citrus Australia was able to advise the major supermarkets and importers of the previous oversupply figures and the forecast for supply - this was done over two seasons. The result was a well-informed supply chain that has avoided over supply of lemons since that time.

National InfoCitrus reports have provided data for many industry representations including to DAFF for the purpose of proving a need for action in certain market access issues. National InfoCitrus reports have been used in various national industry meetings such as the Citrus Australia 2011 Export Marketing Forum, the Citrus Australia 2011 National Conference, the 2012 Export Marketing Forum and the 2012 Citrus Australia National Conference. National InfoCitrus reports are used at Citrus Australia's Domestic Market, Export Market and Varieties committees to guide strategic planning.

InfoCitrus historical reports have been used by growers to determine opportunities in production windows for their region and to further justify changes in variety mix on their properties. InfoCitrus has been used to confirm or refute market intelligence that has suggested oversupply of product in both the domestic and export market.

Overall the industry has engaged with the project and has developed many uses for the information it generates.

Discussion

When *CT09034 National InfoCitrus Development Project* commenced in 2010 the Queensland industry was in its third season of InfoCitrus contribution. The Queensland citrus industry is predominantly a mandarin grower-packer industry with medium to large packers and is unique in that it is the first area each year to produce citrus and enter the market due to the geographical location and varieties grown. The Queensland region had an incentive to use InfoCitrus as they had a degree of control in the market as they were the first to enter it and were alone in the market for a number of weeks.

At that time the tri state regions were predominantly orange producers (although mandarin production has now expanded significantly) and the number and size of packers at the time was large and varied. There has been a significant contraction in the number of packers in the tri state area, particularly in the Riverland and Sunraysia (conversely there has been an expansion of packers in the Central Burnett). Navel growers in the tri state area were sceptical that Citrus Australia could engage the bigger packing sheds to share their information - proving that it could be done swayed the medium sized sheds to become involved.

Whilst it was possible to collect dispatch data on an ongoing basis it has been far more difficult to engage packers in the estimates and forecasting modules of InfoCitrus. The two main reasons were:

1. Whilst it was easy relatively easy for admin staff to autonomously collect and collate the dispatch data it was always the responsibility of the packing shed manager or farm manager to provide an estimate and this proved difficult for many.
2. The 2011 season was a record crop of very small fruit. This was the start of a very difficult period in the citrus industry after coming out of drought, then a heatwave, flooding and the rise and rise of the Australian dollar. Packers consistently reported that they could not predict what they would sell that day and were not interested in trying to forecast over four weeks.

Maintaining an 80% minimum volume in each region has been possible through the support of major packers in each region. This has been a double edged sword in some instances as at times reporting has been held up due to just one or two sheds.

A SWOT analysis of the project was performed at the mid-way point of the project in 2012 (Appendix 3). The SWOT analysis highlights the key strengths, weaknesses opportunities and threats of the *CT09034 National InfoCitrus Development Project* and InfoCitrus.

Listed amongst the strengths are the strong demand from the citrus industry for InfoCitrus information and the buy-in from major stakeholders. However, an identified weakness is the lack of information made available to growers in a regular format - this is a significant issue because the project is levy funded and not all packers are levy payers (some are not growers). This weakness will be addressed in the 2013 season and any subsequent InfoCitrus project. Also identified in the SWOT analysis is the opportunity to further explore provision of export information, including a breakdown of dispatches into key countries which will give powerful information to exporters. The InfoCitrus system is levy funded and as such is vulnerable as funding priorities may change and to this point no model of self-sustainability has been explored.
An initial difficulty for most packers was the collation of their data to a format that suited InfoCitrus, once each packer developed a system the issue was rarely raised again. In some cases the packing sheds were under staffed and they sent their raw data in by fax or email and it was entered by an InfoCitrus administrator. Sheds with computerised packing systems were able to interface with the InfoCitrus system through csv files which means very little staff time is required to submit data.

Recommendations

It is recommended that HAL and the Australian citrus industry continue to invest in the development and improvement of InfoCitrus - with the aim to add value to the industry through variations in the type of data reported and increasing the audience it reaches.

To meet these objectives the following approach is recommended:

- Work towards minimising the workload on contributors through improved systems such as increasing the number of sheds using the csv data upload method.
- Determine the need for short term estimates and revisit the methods used to collect this data.
- Work one on one with packers to develop and enter seasonal forecasts to InfoCitrus.
- Create a reporting format for growers which provides relevant data but does not compromise the contributor arrangement.
- Work with key stakeholders to determine their information needs - for example export market data - this may only require a new report to be developed or could involve the development of a new InfoCitrus module.
- Research the types of data available to overseas industries and other industries within Australia and present it to the Australian industry.
- Look for ways to incorporate other national data requirements such as the National Plantings Database and the National Crop Forecast into one source of information - streamlining delivery of information to stakeholders.

These activities are important to ensure that:

1. The system is sustainable and a cost effective solution for the Australian citrus industries data collection needs.
2. There are improved outcomes for all key stakeholders
3. The maximum benefit is derived from the InfoCitrus system for the benefit of the Australian citrus industry.

Acknowledgements

Citrus Australia would like to acknowledge the following:
All of the packing sheds and contributors to InfoCitrus.
Graeme Forsythe and Associates
MDR - Rhoda Georgiou

Appendices

Appendix 1: Weekly InfoCitrus report
Appendix 2: Example of end of season graphs and analysis
Appendix 3: Mid-point review InfoCitrus SWOT analysis

Appendix 1 Weekly InfoCitrus report

To all InfoCitrus contributors:

MANDARINS: Total dispatches of mandarins for week ending 28 July were just under 3,500 tonnes. This was primarily driven by an increase of Murcott volumes which exceeded 2,200 tonnes for the week. The increase in volume was not reflected in the export volumes dispatched which have been static at around 900 tonnes per week for the past three weeks. The domestic market is now heavily supplied and this heavy volume is expected to soften pricing as marketers attempt to clear stock.

ORANGES: Californian fruit in our major export markets Japan and the USA is still influencing demand. Industry sources indicate large volumes of South African fruit are bound for Japan which will put further pressure on that market. Volumes to both these destinations have tapered back and total exports reflect this dropping to 4,000 tonnes per week (week ending 28 July). Single desk importer to the USA, DNE are encouraging a lift in shipments for the end of the program however exporters are hesitant.

Overall volume of citrus dispatched in week ending 28 July was almost 11,000 tonnes of which 6,000 tonnes were to the domestic market.

Industry Dispatches for All Origin Regions Imperial Mandarin 22 Jul - 28 Jul 2012 (Week30)

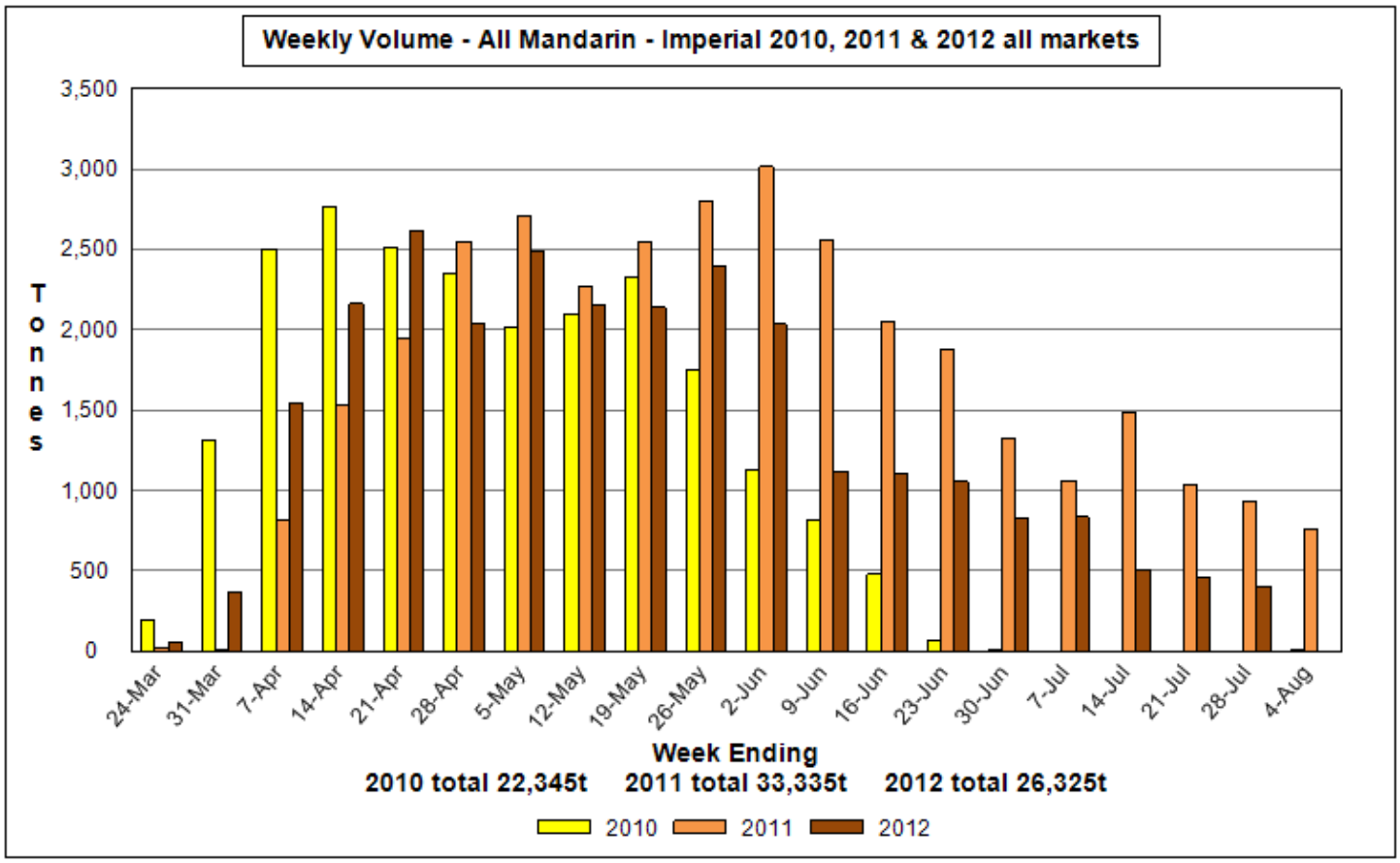
Dest State	9 Kg	10 Kg	13 Kg	18 Kg	Total 9Kg Eqv	Total Tonne Eqv	P/PK Tonnes	Total Tonne Eqv (All)
	Packs	Packs	Packs	Packs	Pack		Bulk	
EXP				55	110	1.0		1.0
NSW	8,432	549	1,600	3,231	17,815	160.3	13.8	174.1
QLD	576				576	5.2	1.1	6.3
SA	1,167	268	72	88	1,745	15.7	8.8	24.5
VIC	8,030			4,977	17,984	161.9	3.2	165.1
WA		650	1,550		2,961	26.7	2.8	29.5
Total	18,205	1,467	3,222	8,351	41,191	370.8	29.7	400.5

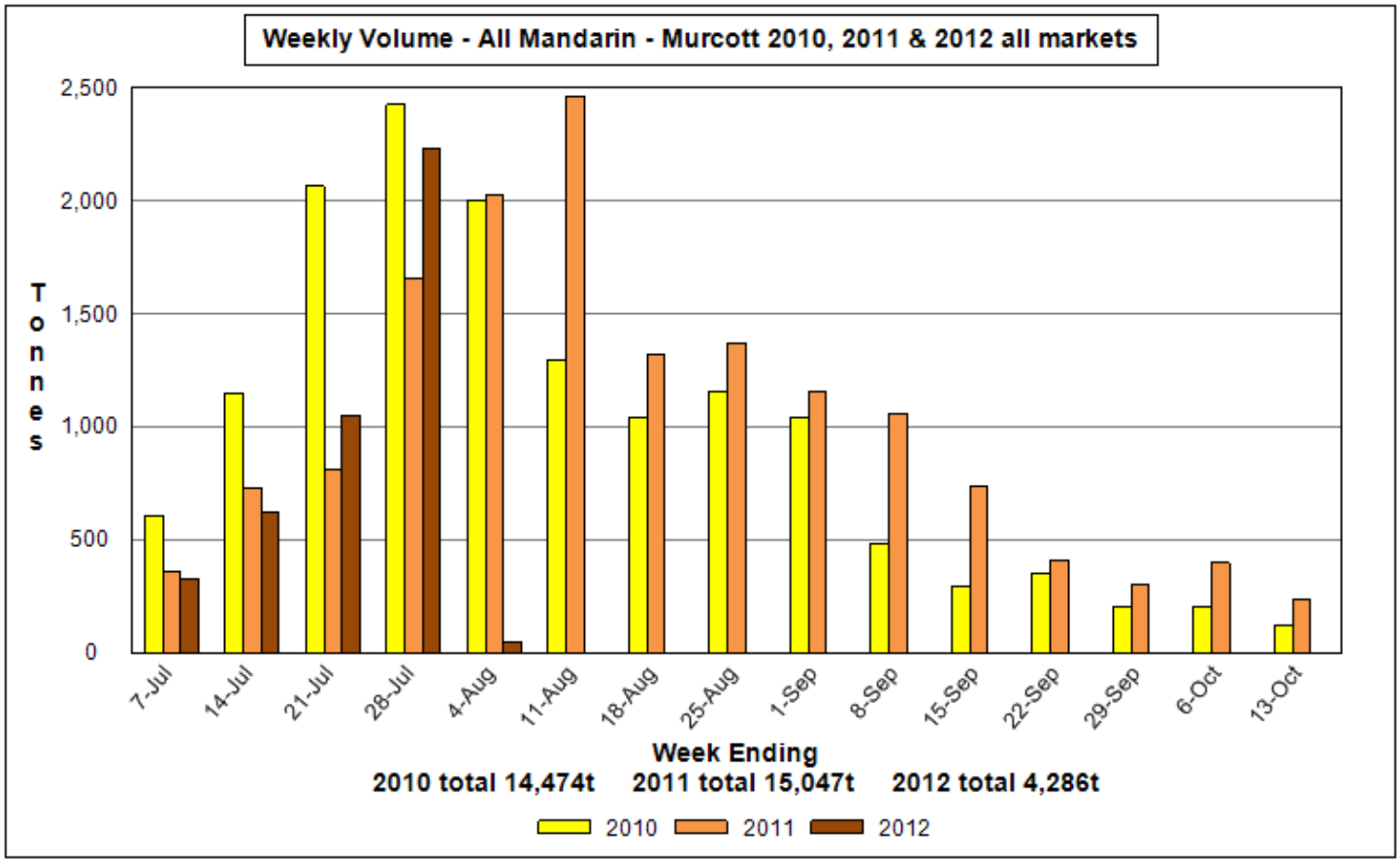
Industry Dispatches for All Origin Regions Murcott Mandarin 22 Jul - 28 Jul 2012 (Week30)

Dest State	9 Kg	10 Kg	13 Kg	15 Kg	18 Kg	Total 15Kg Eqv	Total Tonne Eqv	P/PK Tonnes	Total Tonne Eqv (All)
	Packs	Packs	Packs	Packs	Packs	Pack		Bulk	
EXP	13,461	1,937		21,761	6,690	39,157	587.4		587.4
NSW	11	478	144	15,571	6,796	24,176	362.6	74.8	437.4
QLD	468		3,884	12,700	16,980	36,723	550.8	44.5	595.3
SA			1,996			1,730	25.9		25.9
TAS				480		480	7.2		7.2
VIC	2,565	288	216	13,387	18,253	37,209	558.1	19.2	577.3
Total	16,505	2,703	6,240	63,899	48,719	139,475	2,092.0	138.5	2,230.5

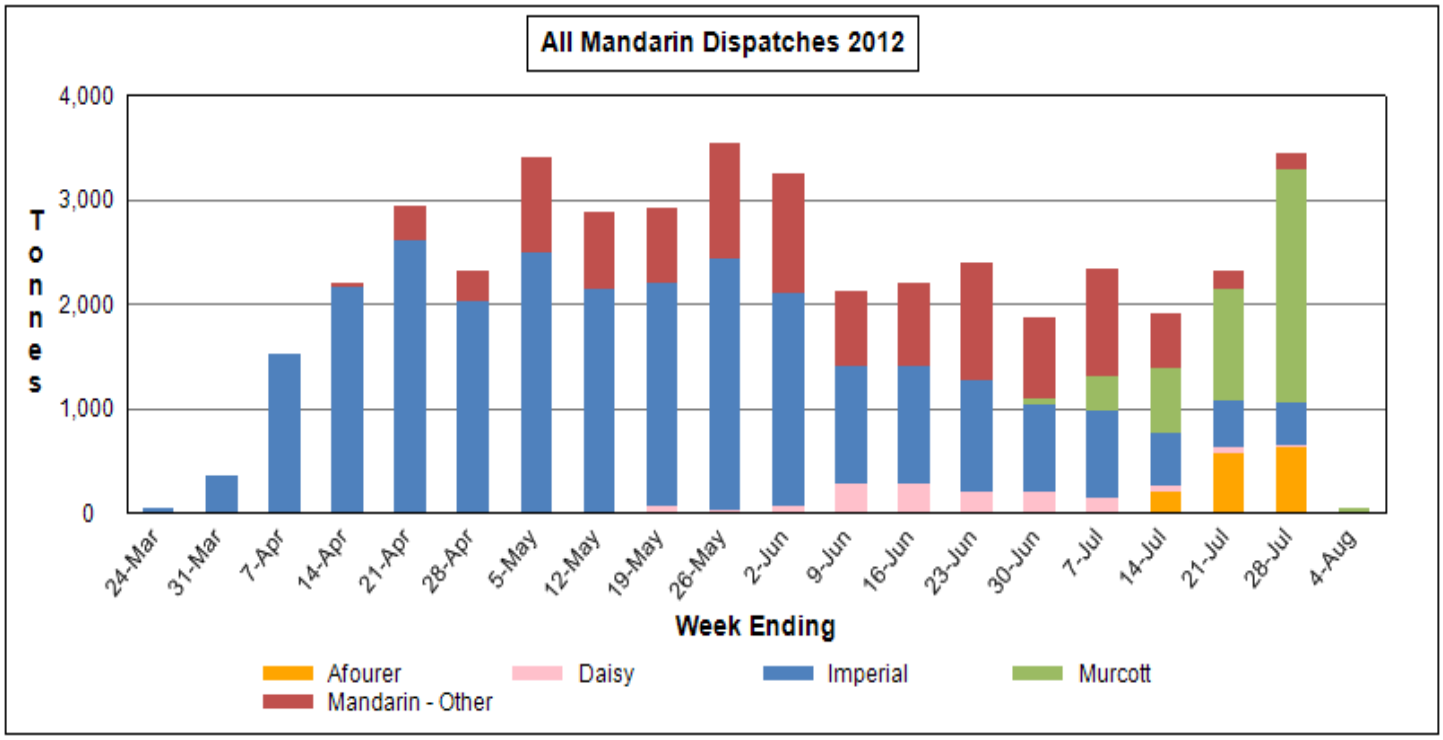
Industry Dispatches for All Origin Regions Afourer Mandarin 22 Jul - 28 Jul 2012 (Week30)

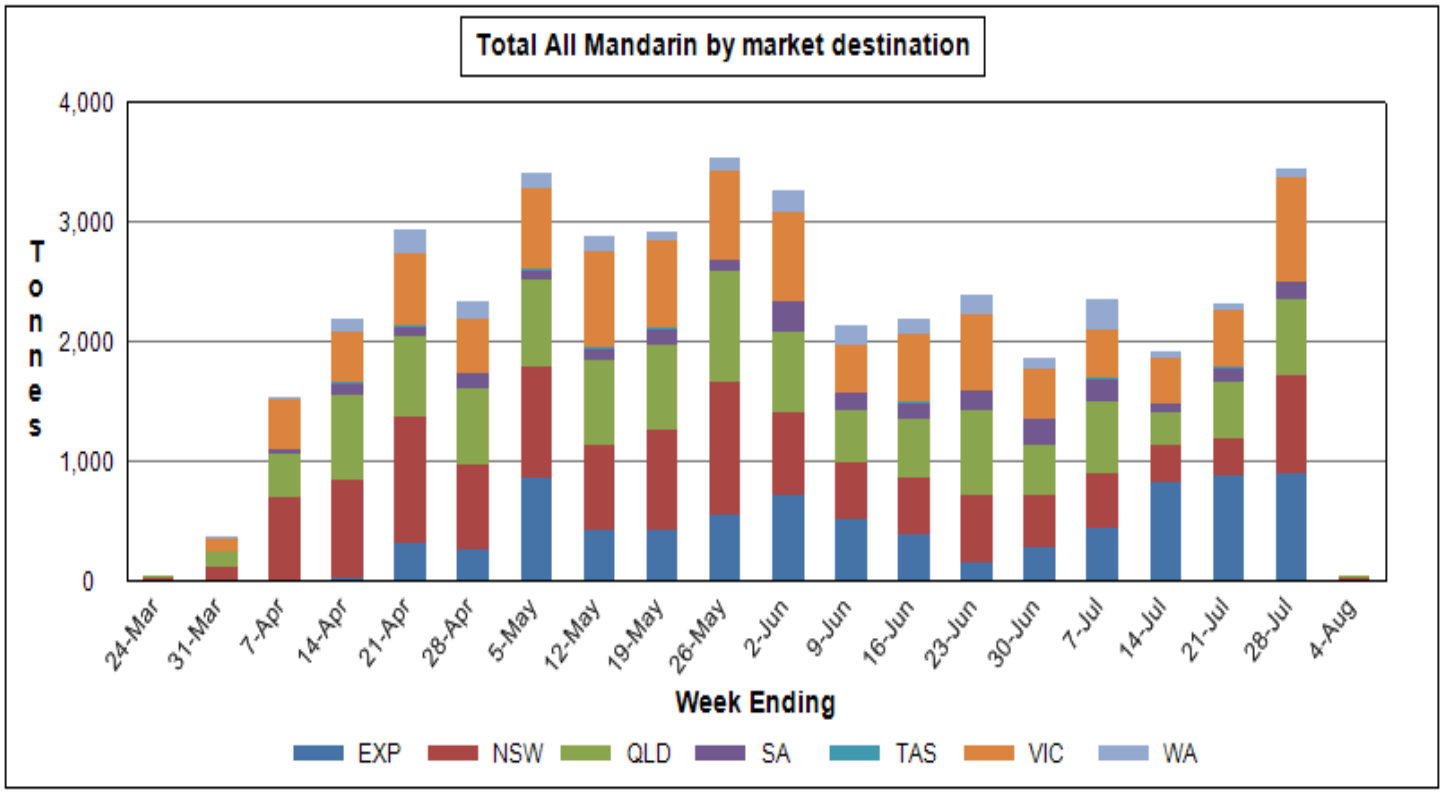
Dest State	9 Kg	10 Kg	14 Kg	15 Kg	18 Kg	Total 15Kg Eqv	Total Tonne Eqv	P/PK Tonnes	Total Tonne Eqv (All)
	Packs	Packs	Packs	Packs	Packs	Pack		Bulk	
EXP		3,800		443	10,040	15,024	225.4	0.6	226.0
NSW	413	2,301		2,546	6,719	12,391	185.9	9.9	195.8
QLD		66		396	281	777	11.7		11.7
SA		900		509	2,797	4,465	67.0	1.4	68.4
TAS					218	262	3.9		3.9
VIC	1,248	1,770	72	2,465	2,394	7,334	110.0		110.0
WA		832		634	543	1,840	27.6		27.6
Total	1,661	9,669	72	6,993	22,992	42,093	631.5	11.9	643.4





NOTE - At this time, the system only collects data on the first point of dispatch. It is therefore not possible to pick up inter-wholesaler and wholesaler-exporter trading that occurs between the different businesses and different central markets. Therefore, for example, the export figures in this report only show product being directly exported by packhouses.


All Mandarin Dispatches 2012
Tonnes
4,000
3,000
2,000
1,000
0
24-Mar
31-Mar
7-Apr
14-Apr
21-Apr
28-Apr
5-May
12-May
19-May
26-May
2-Jun
9-Jun
16-Jun
23-Jun
30-Jun
7-Jul
14-Jul
21-Jul
28-Jul
4-Aug
Week Ending
Afourer
Daisy
Imperial
Murcott
Mandarin - Other


Total All Mandarin by market destination
Tonnes
4,000
3,000
2,000
1,000
0
24-Mar
31-Mar
7-Apr
14-Apr
21-Apr
28-Apr
5-May
12-May
19-May
26-May
2-Jun
9-Jun
16-Jun
23-Jun
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Week Ending
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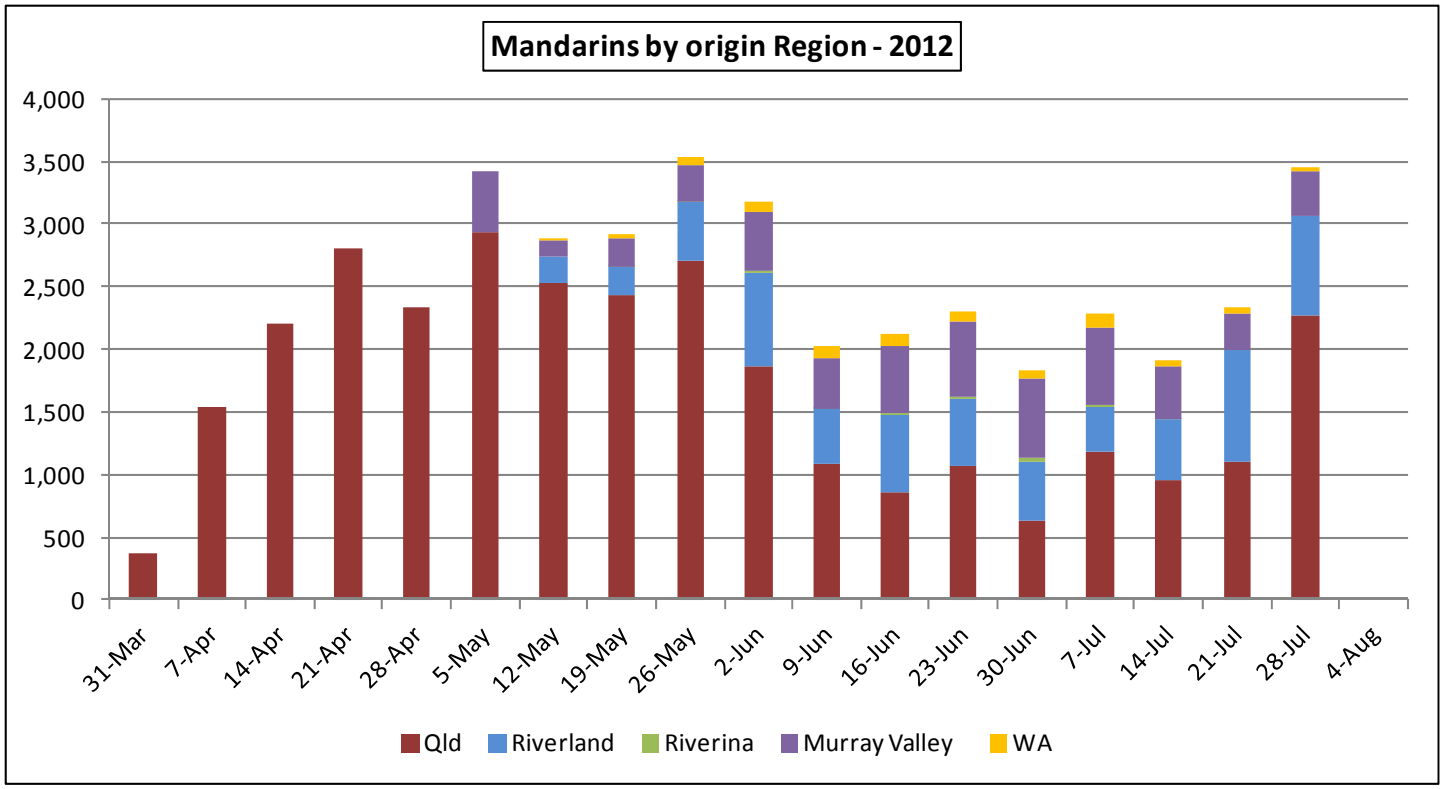
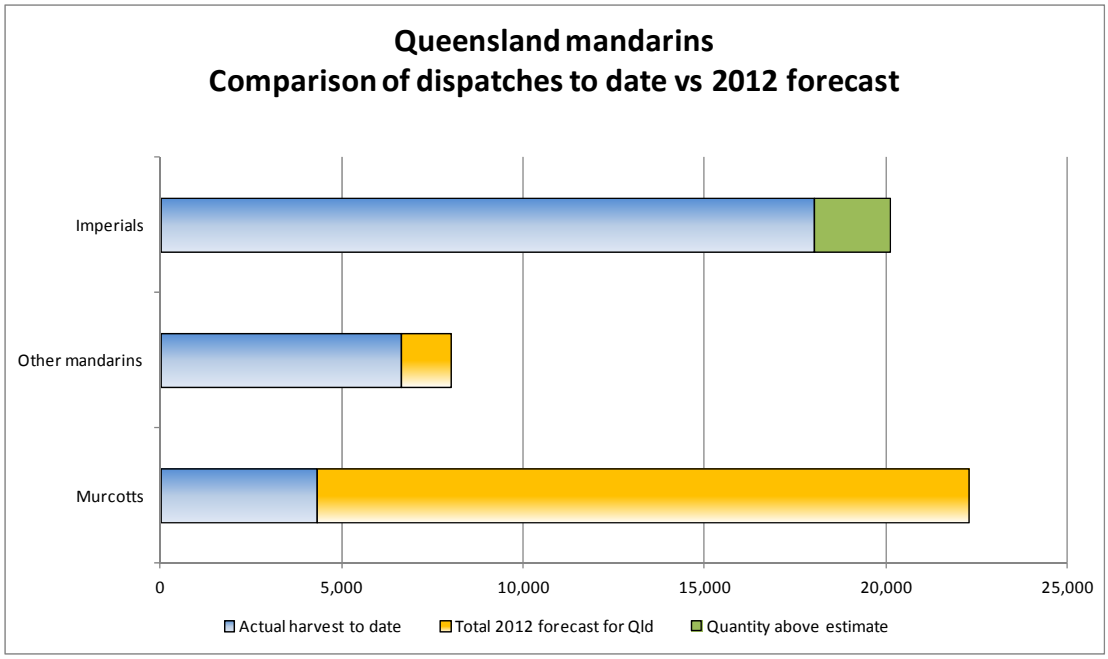
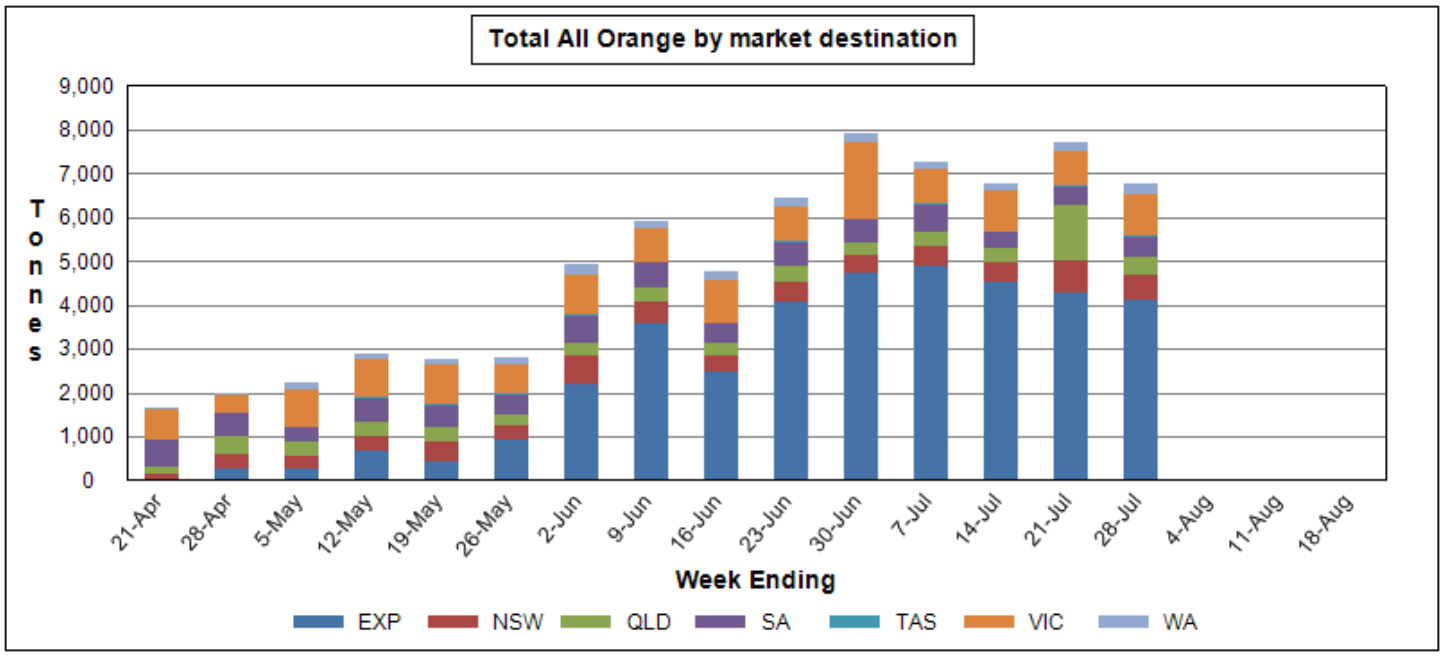
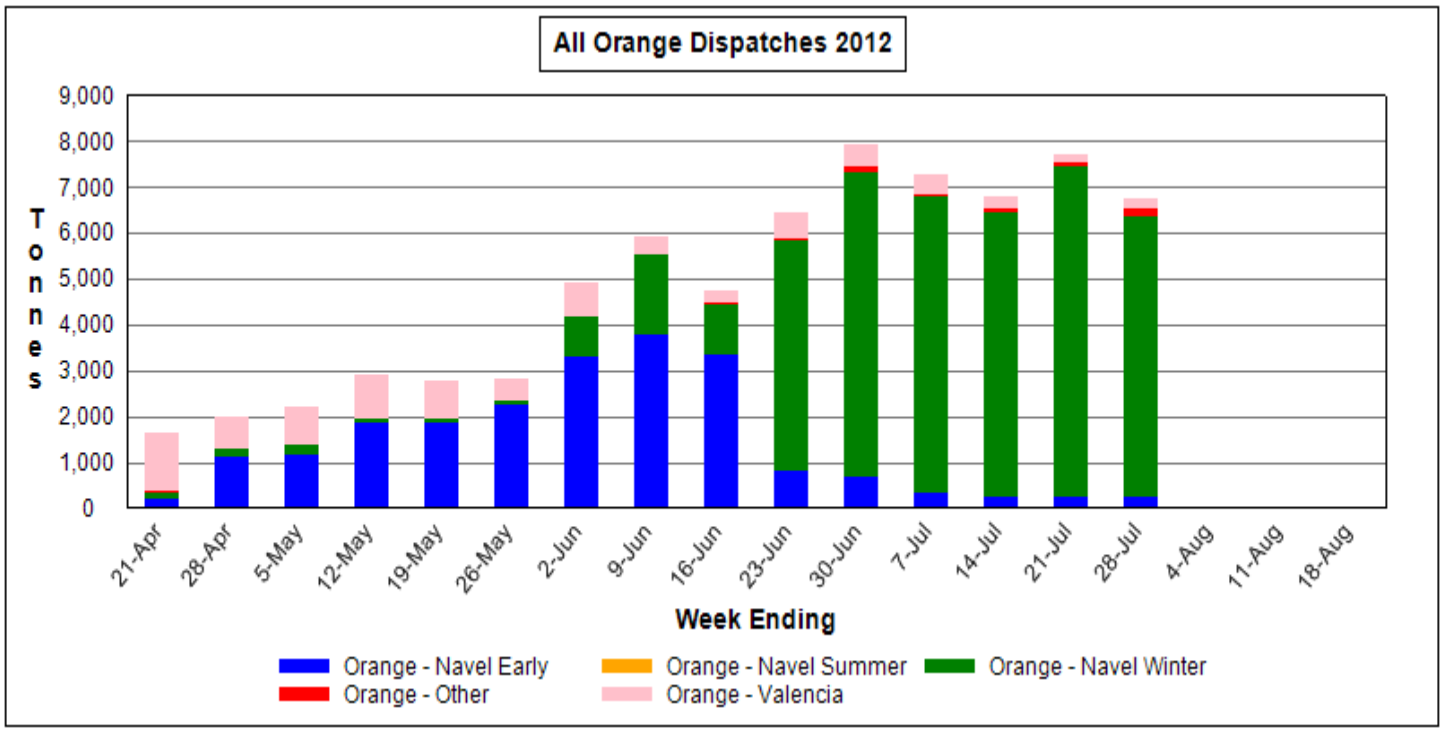
NSW
QLD
SA
TAS
VIC
WA





Note—the 2012 forecast for mandarins is based on Citrus Australia's forecast for Queensland, dated March 2012

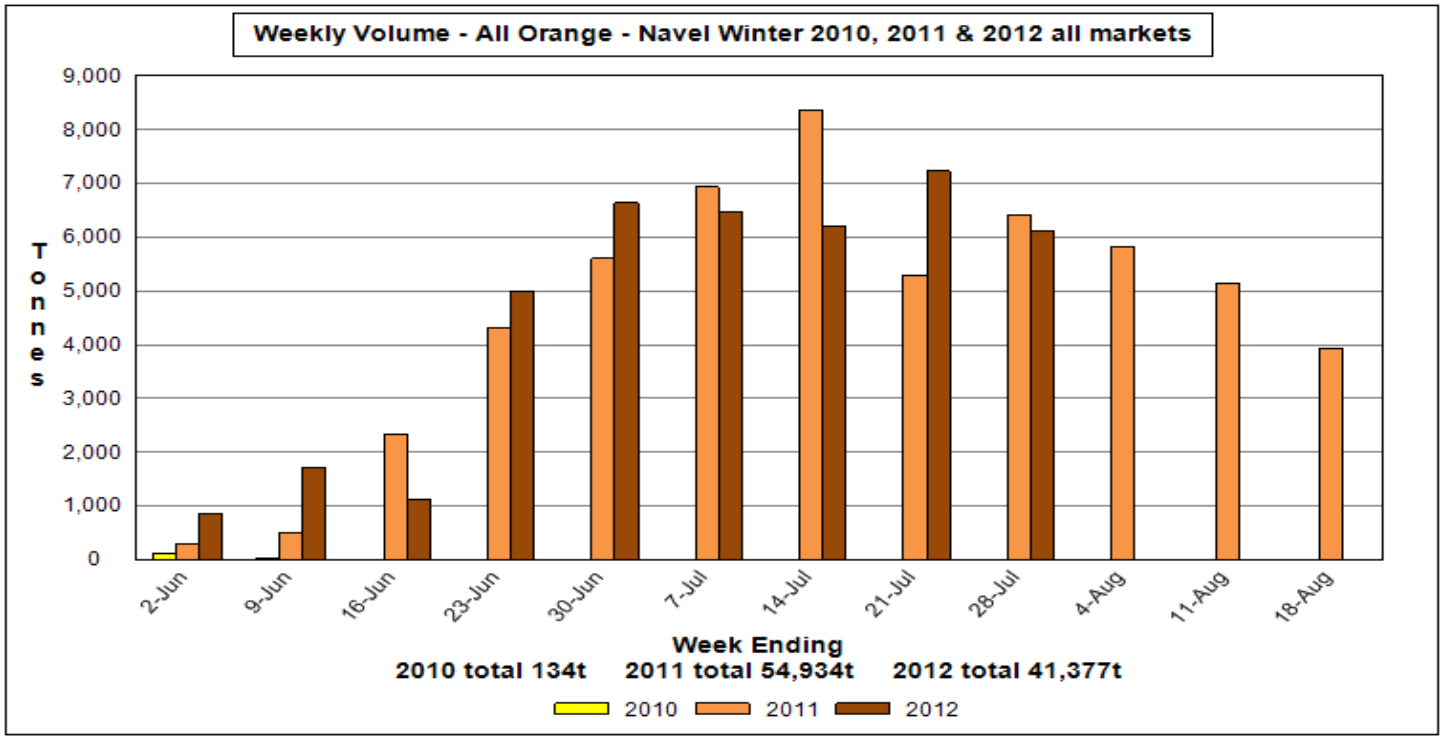


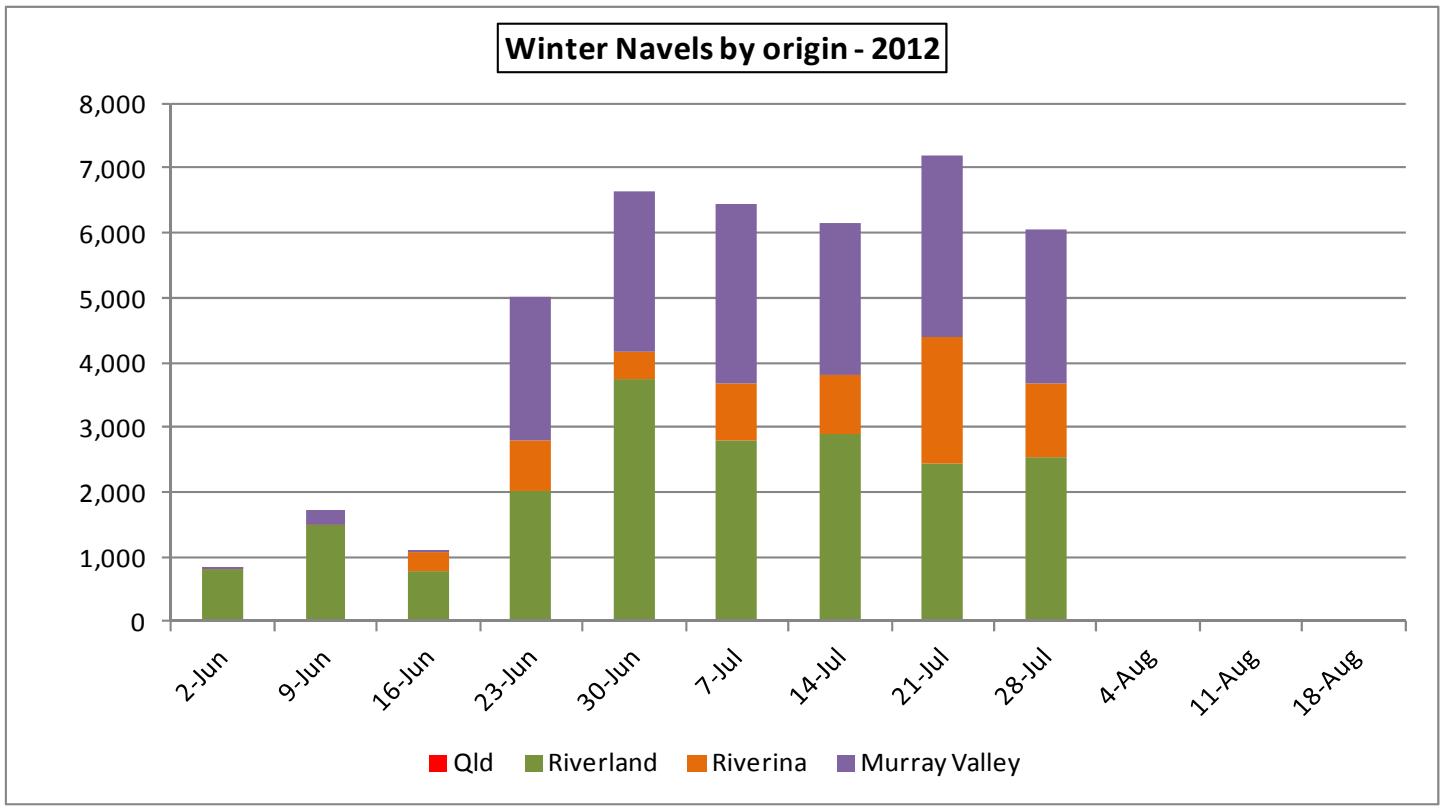


Industry Dispatches for All Origin Regions Navel Winter Orange 22 Jul - 28 Jul 2012 (Week30)

Dest State	13-14 Kg	15-16 Kg	18 Kg	19 Kg	20 Kg Eqv	21+ Kg	Total 20Kg Eqv	Total Tonne Eqv	P/PK Tonnes	Proc Tonnes	Total Tonne Eqv (All)
	Packs	Packs	Packs	Packs	Packs	Packs	Pack		Bulk	Bulk	
EXP	2,800	114,984	10,398	9,639	74,255	9,114	193,343	3,866.9	173.0		4,039.9
NSW	3,324	3,648	2,548	500	4,121	189	12,159	243.2	183.6	140.8	567.6
QLD	5,796	6,600	1,646		4,485	126	15,126	302.5	87.4		389.9
SA	966	1,569	560	148	942		3,455	69.1	25.2	111.9	206.2
TAS		66			315		366	7.3	2.2		9.5
VIC	360	13,424	798		4,433	63	15,864	317.3	247.5	158.5	723.3
WA	984	2,483	1,699	106	840		5,058	101.2	91.2		192.4
Total	14,230	142,774	17,649	10,393	89,391	9,492	245,370	4,907.5	810.1	411.3	6,128.9

The above graph includes processing tonnes (predominantly Valencia oranges)

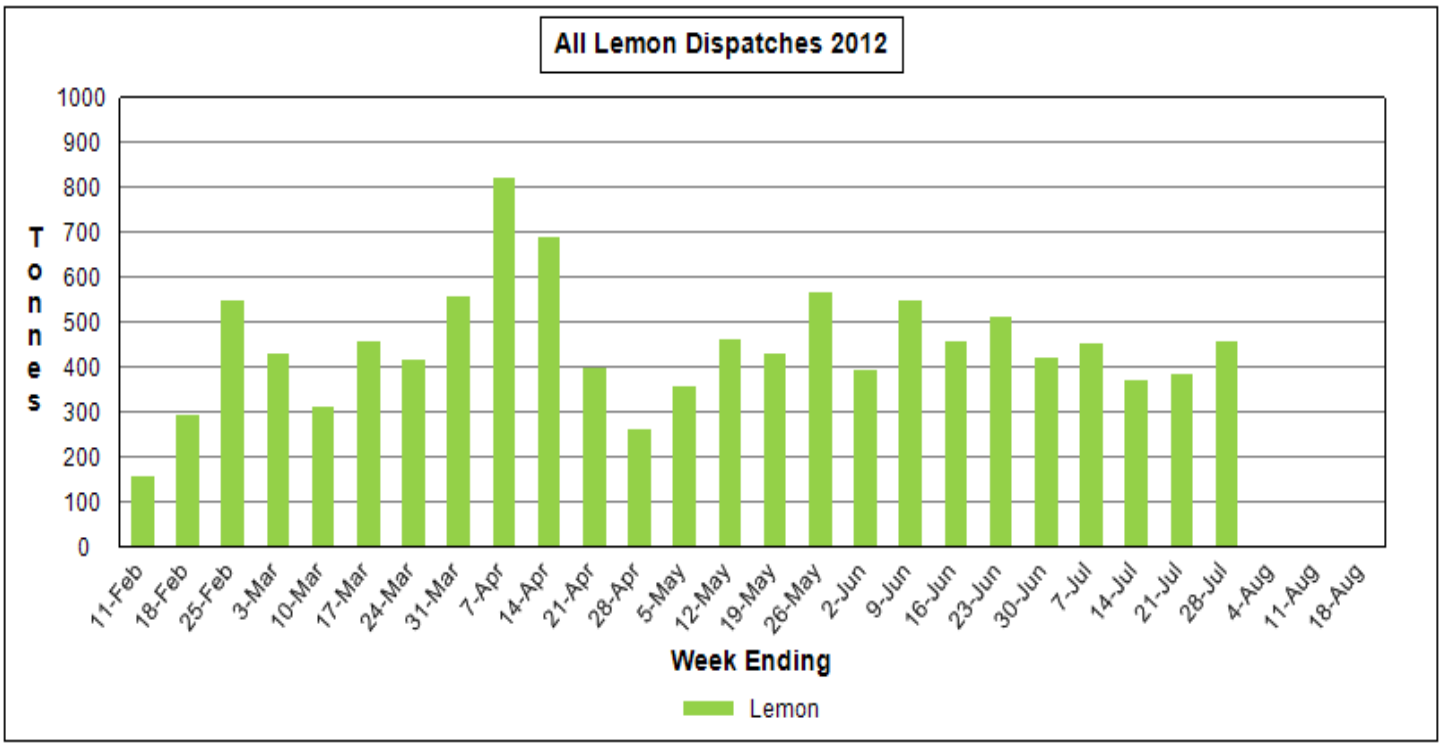


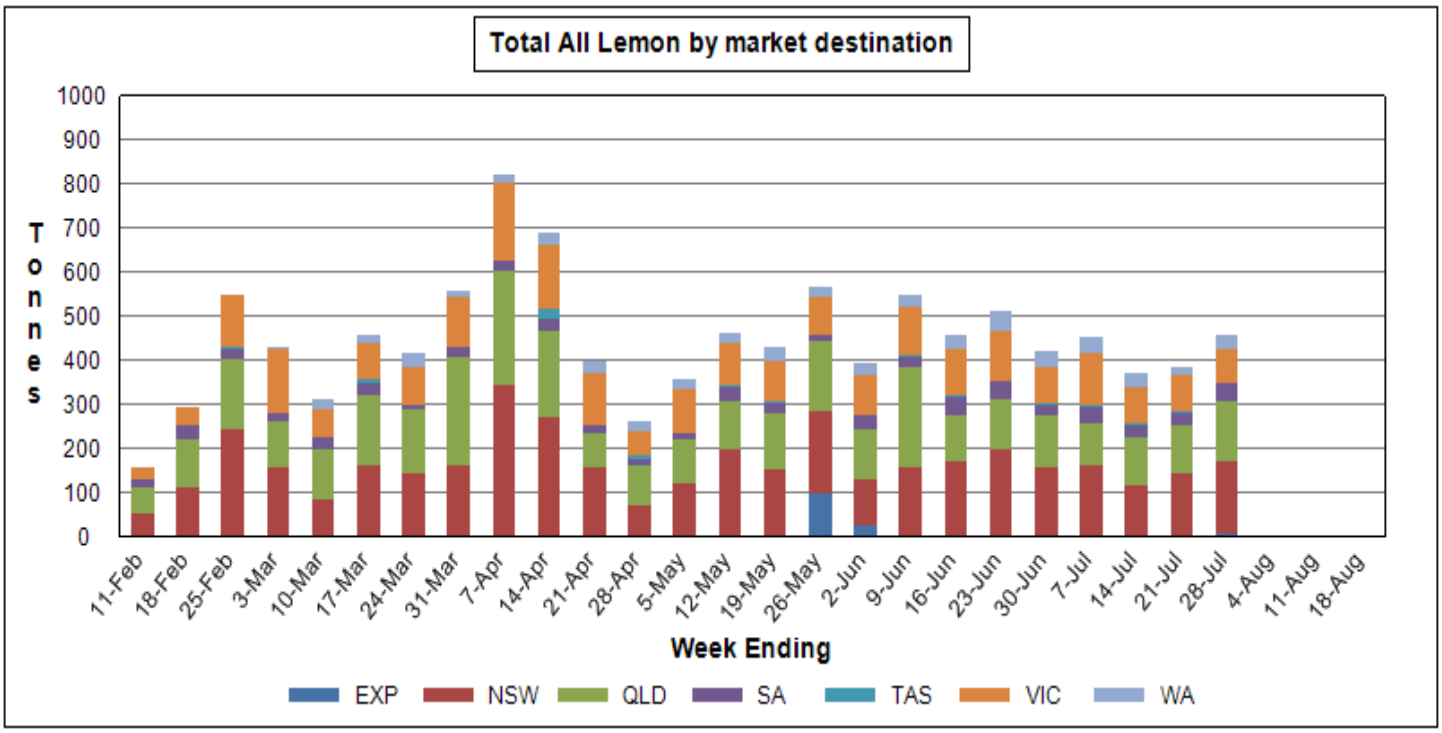


Note—all dispatches include processing figures

InfoCitrus Weekly Report

22 July - 28 July 2012 (Week 30)





Contributors

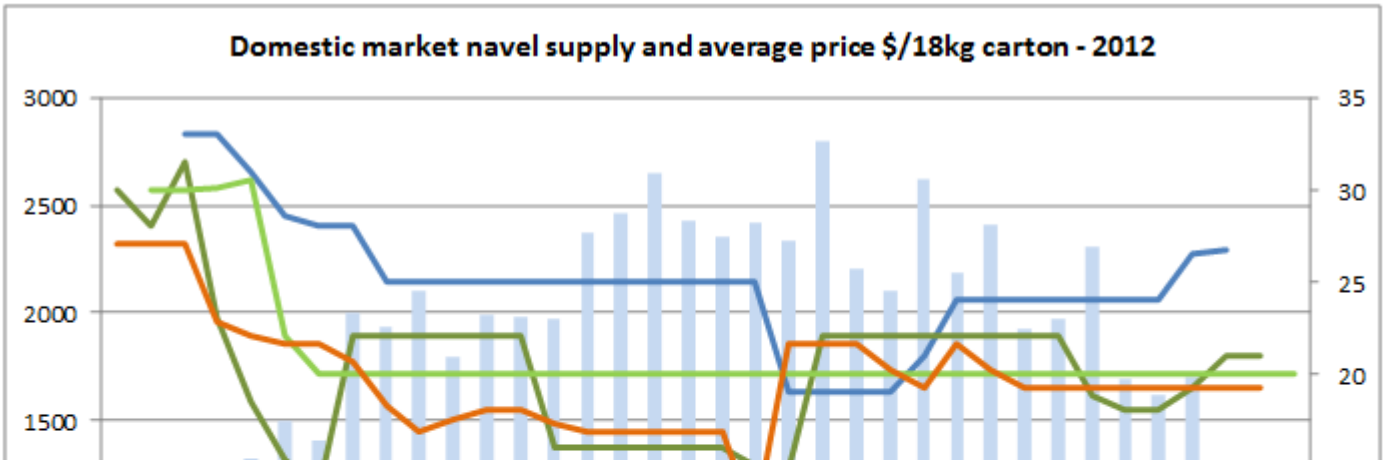
A very big thank you to all of you who contribute data to InfoCitrus. Currently we don't have enough contributors to the weekly supply estimates for oranges to include a table on predicted tonnes for the coming weeks.

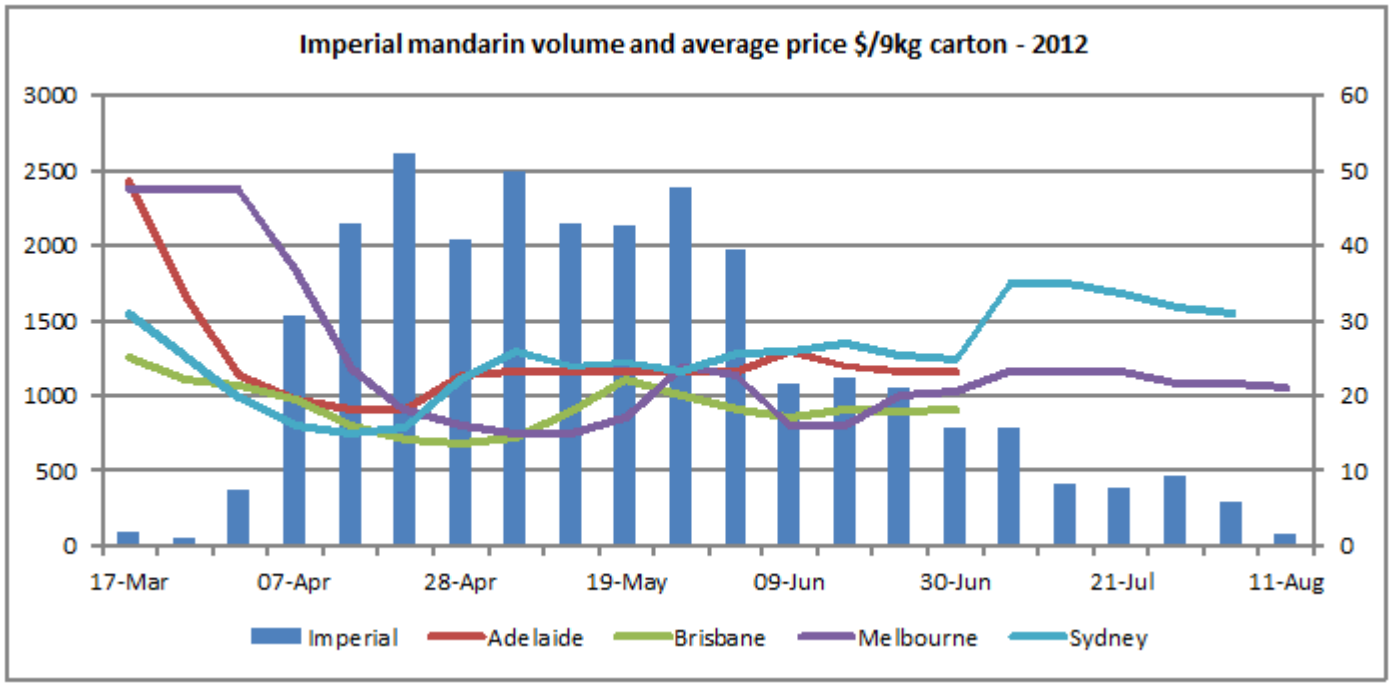
In the past we have asked for a 4 week estimate, if this is too difficult providing a weekly or fortnightly estimate on the form would assist us in providing the information to industry. This is a best estimate of tonnes coming in to the shed. .

InfoCitrus can also be used to develop harvest rates—but these are reliant on all contributors completing and updating there seasonal forecast forms.

Please give me a call to discuss any of the above. (Nathan 0429 772 181)

Appendix 2 Example of end of season graphs and analysis





Appendix 3 Mid-point review InfoCitrus SWOT analysis

CT09034 InfoCitrus project: SWOT Analysis 31 May 2012

Strengths

- Demand from the citrus industry for the service/information is strong
- Buy-in from major stakeholders is strong
- Multifaceted uses of the information – short term - weekly; medium term – seasonal; long term – 5-10 year planning
- A national program which captures whole of market information for the entire citrus industry
- Prompt, frequent reporting allows rapid response to changing market conditions
- A centralised, online system which is effective and affordable

Weaknesses

- Currently a lack of information distribution to growers (levy payers)
- Reliance on multiple contributors which leads to operational timing issues
- Reduced staff in packing sheds during tough times can lower their priority for InfoCitrus data entry
- Citrus Australia resourcing issue: a seasonal timing clash with ACQS intense period
- Software developer/provider: too much reliance, service often not adequate
- Licencing arrangement with Avocados Australia - needs to be a direct contract with the service provider
- Juice fruit – direct supply to factories is currently not being captured

Opportunities

- Export information: breakdown into markets will give powerful information to exporters
- Addition of market pricing would strengthen supply chain transparency analysis
- Extensions into crop forecasting and National Plantings Database
- Efficiencies: greater automation through integration with packer software
- Juice fruit: capture direct supply to processors
- Devising ways to extend information to growers in a weekly format (not just seasonal reporting)

Threats

- Lack of ongoing project support from the national levy fund
- Some individual packers withdrawing their support due to political differences with Citrus Australia
- Loss of key staff – manager, data collator