

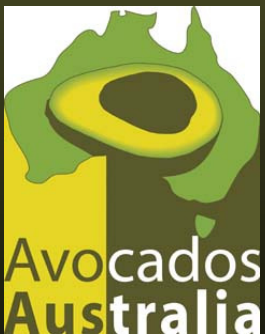
Avocado Retail Quality Surveys



Joanna Embry Avocados Australia

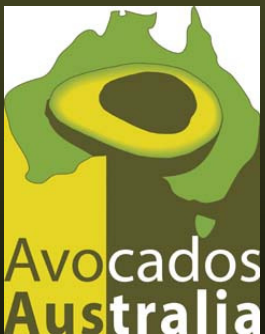
Presentation Overview

- Why conduct quality surveys
- What quality parameters to survey
 - Consumer sensory testing
 - Online survey
- Results to date
- Where to from here

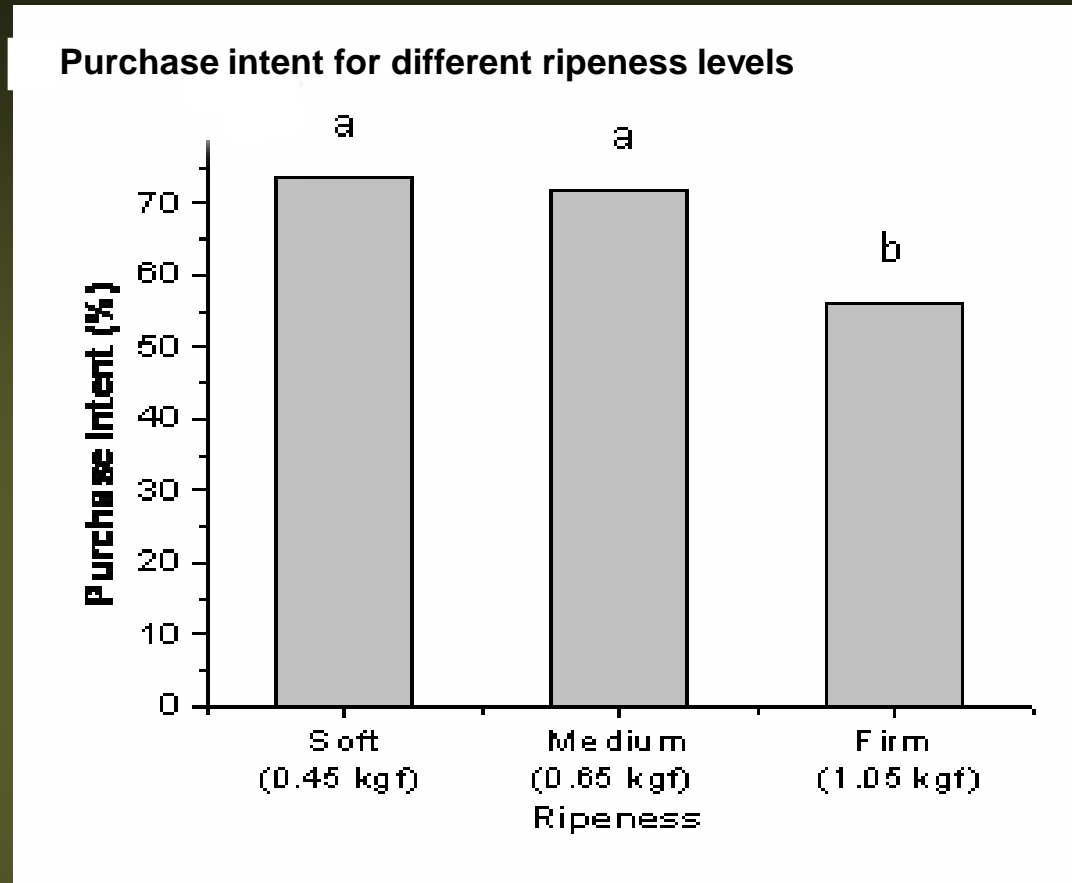


Consumer sensory panels and online surveys

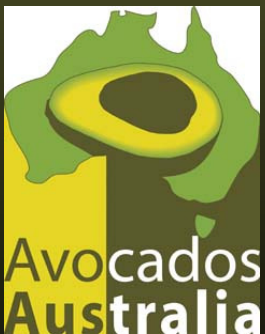
- Ripeness
 - level of ripeness (firmness) preferred by consumers
- Internal flesh quality
 - maximum acceptable level of internal defects at different price points above which future consumer purchasing decisions are negatively influenced
- Maturity
 - minimum maturity (measured by DM%) that produces Hass avocados of acceptable eating quality



Ripeness

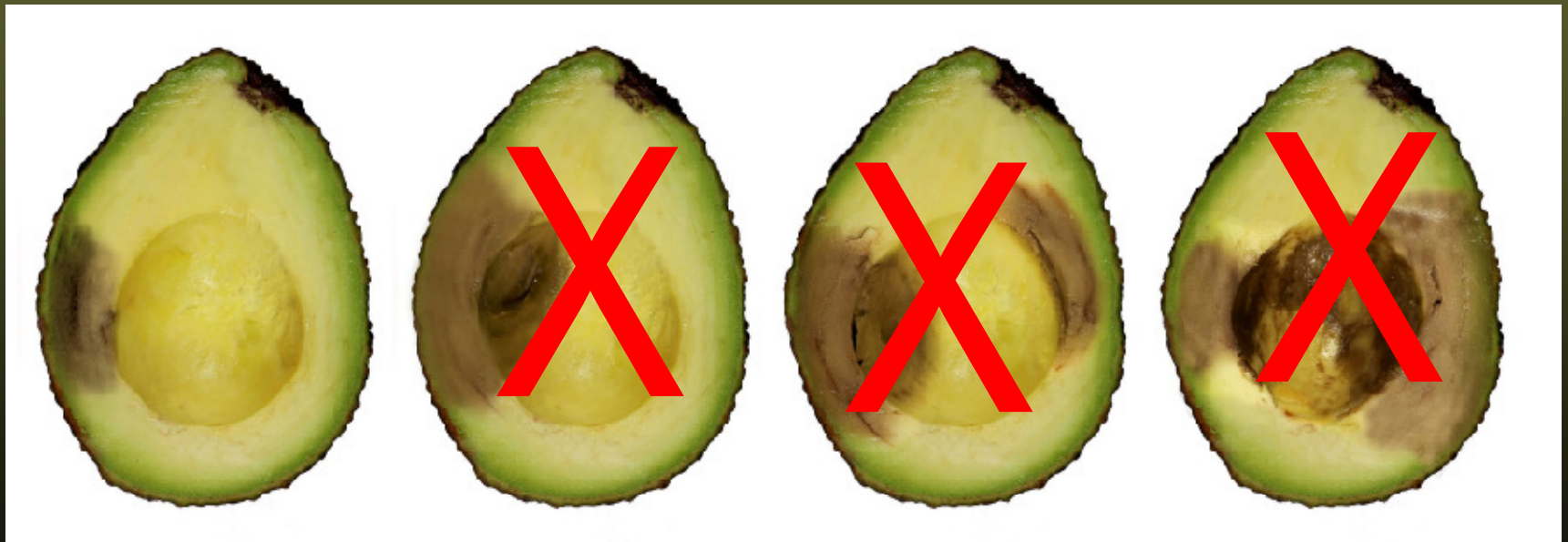


- 85% of consumers have a preference to purchase avocados that are ready to eat/use immediately
- Consumers prefer soft ripe and medium ripe avocados
- Consumers select for ripeness on colour then squeezing

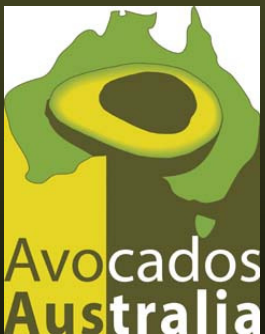
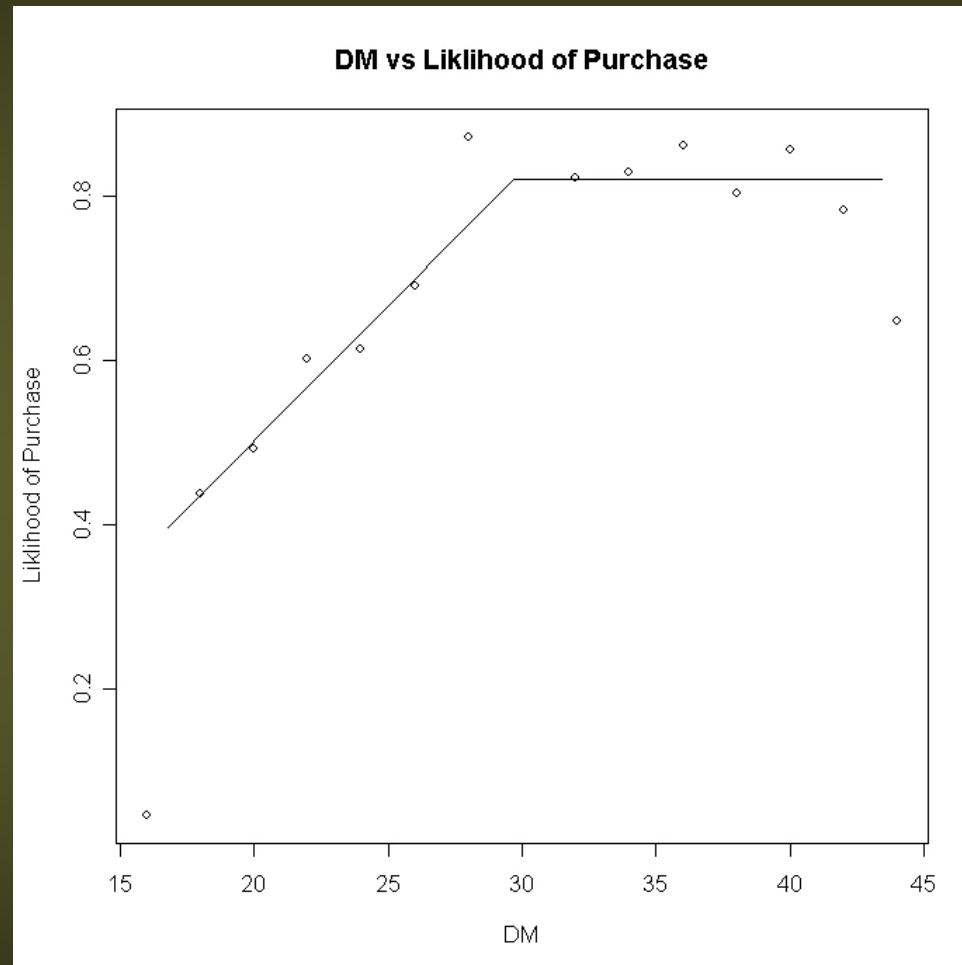


Internal Quality

- Severity of defect was of primary importance followed by price
- At all prices an incidence of more than 10% internal damage significantly impacts on probability of repurchase



Maturity : DM v Likelihood of Purchase

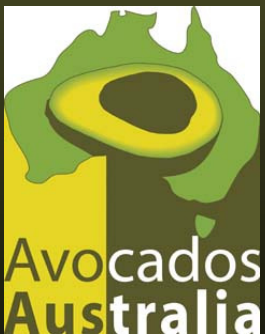


- 22% - 28% Competitive advantage

What we know consumers want and will alter purchasing for

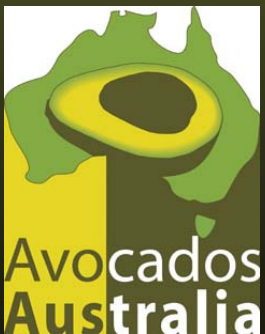
- They want fruit they can eat tonight
- They want unblemished fruit – no more than 10% damage
- They want mature fruit – above 22%

What do we give them?



Retail Quality Surveys

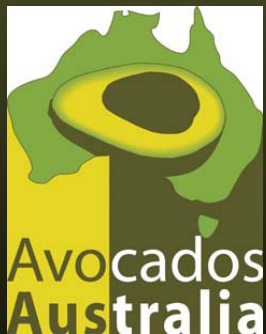
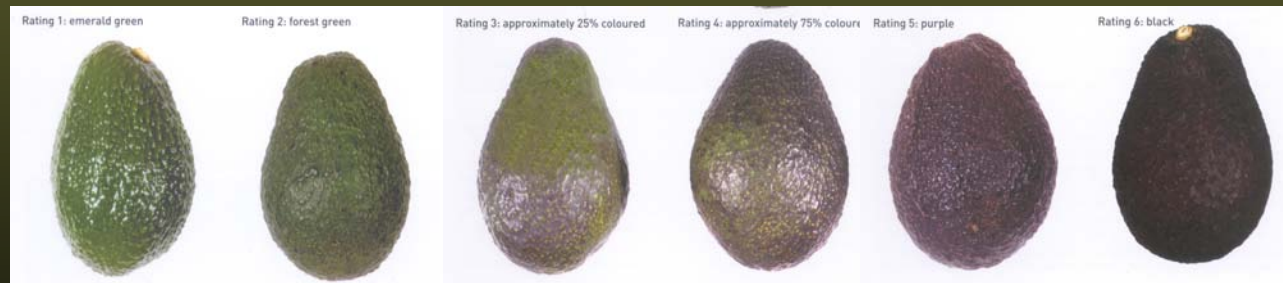
- Began in October 2007
 - 16 stores in each Sydney, Brisbane, Melbourne & Perth
 - Monthly
- Information collected
 - Price
 - Display details
 - Size
 - Weight
 - Sticker Information
 - Internal quality



Key findings for 07/08

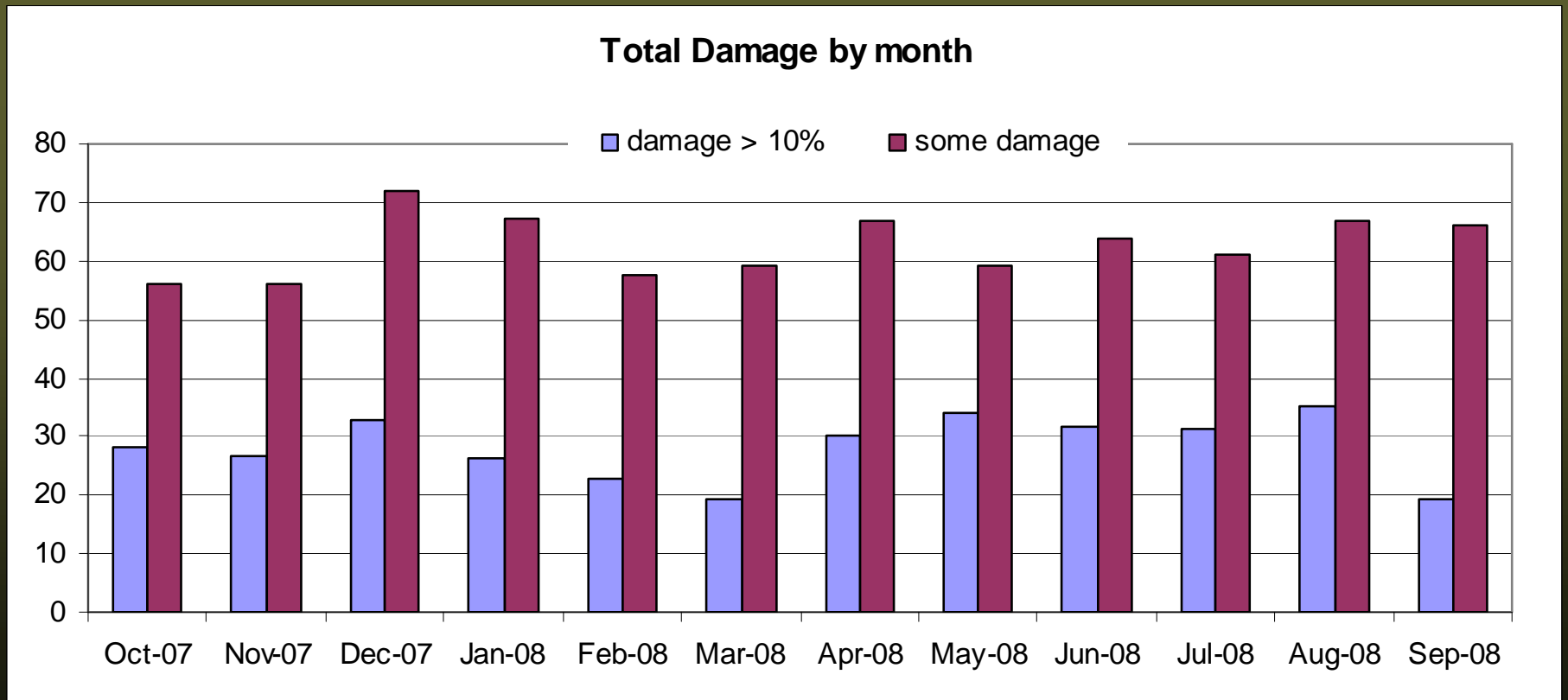
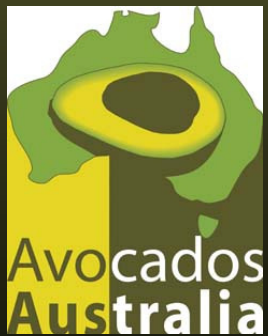
- More than half fruit colour level 3 or below
 - NSW 51% of stores
 - Qld 40% of stores
 - WA 30% of stores
 - Vic 5% of stores

1 2 3 4 5 6

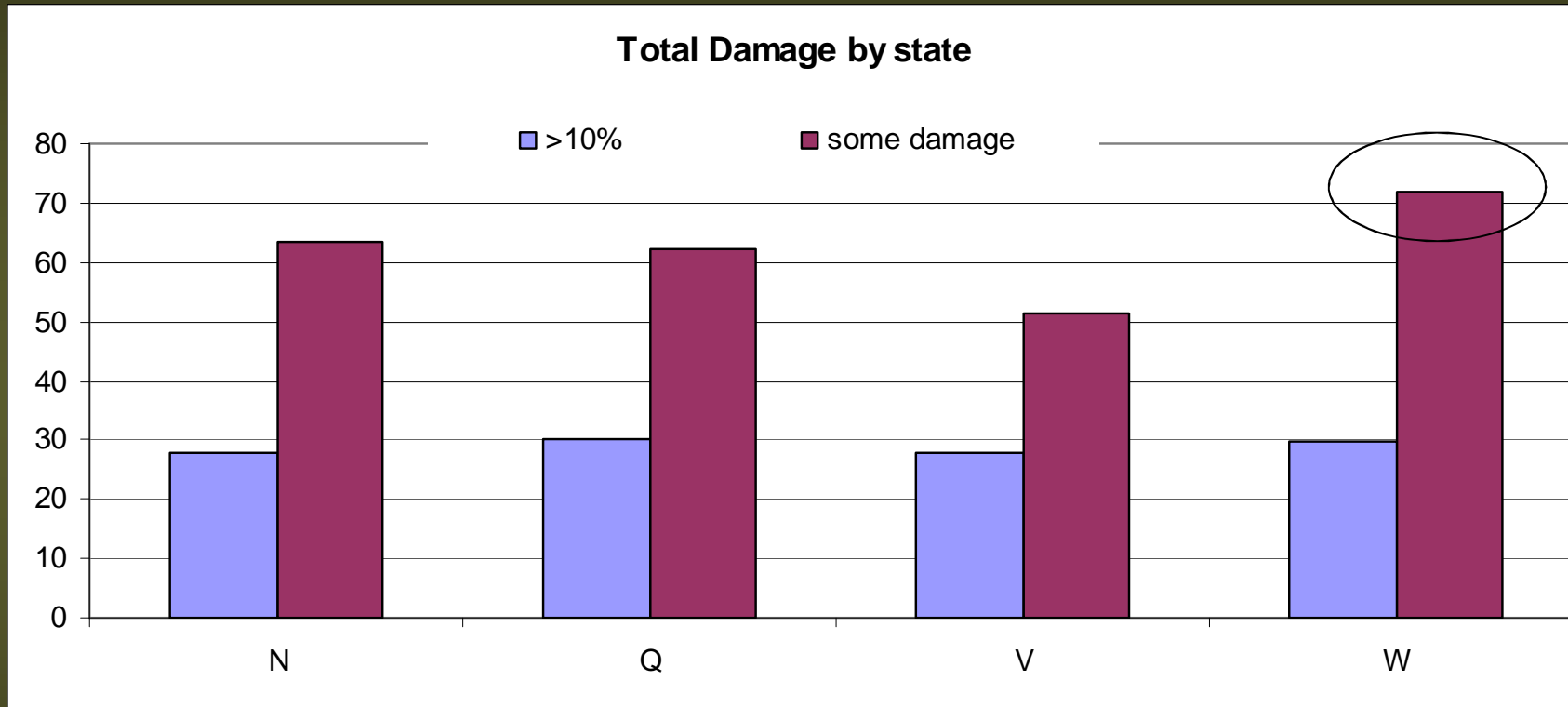


Key findings for 07/08

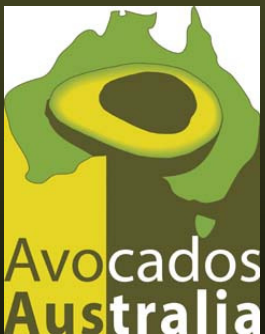
Incidences of internal defects had a significant association with sampling month, state and store type of purchase



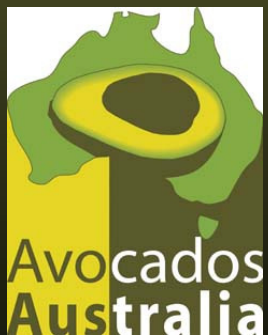
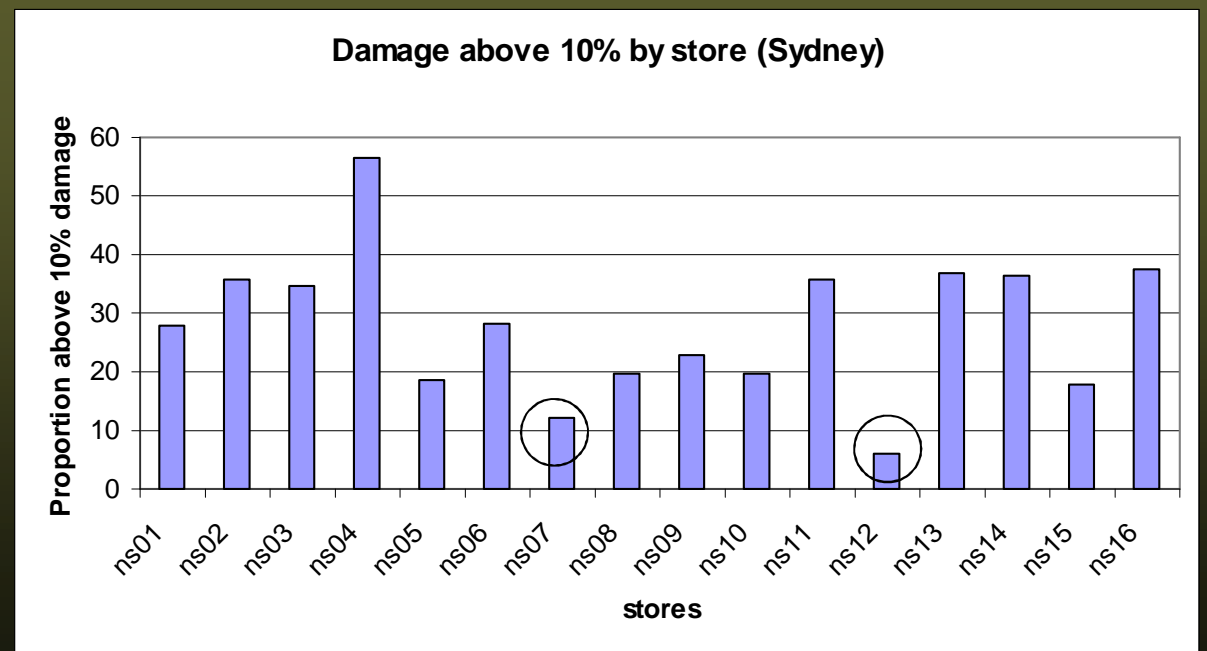
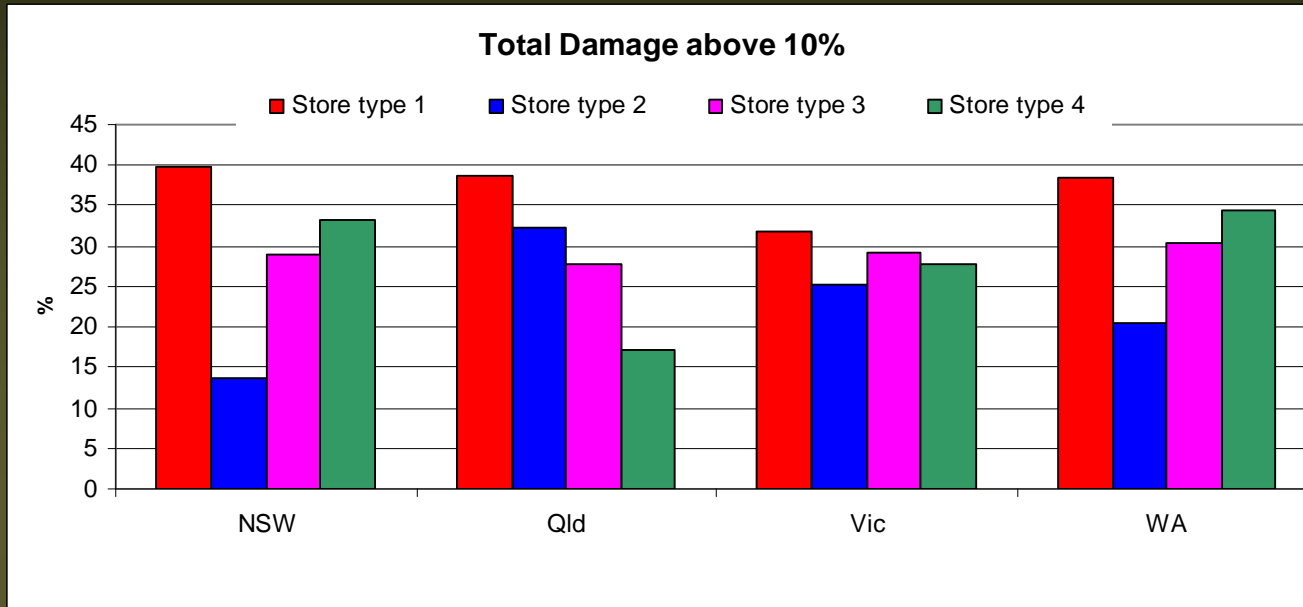
Total Damage by State



Around 29% in all states

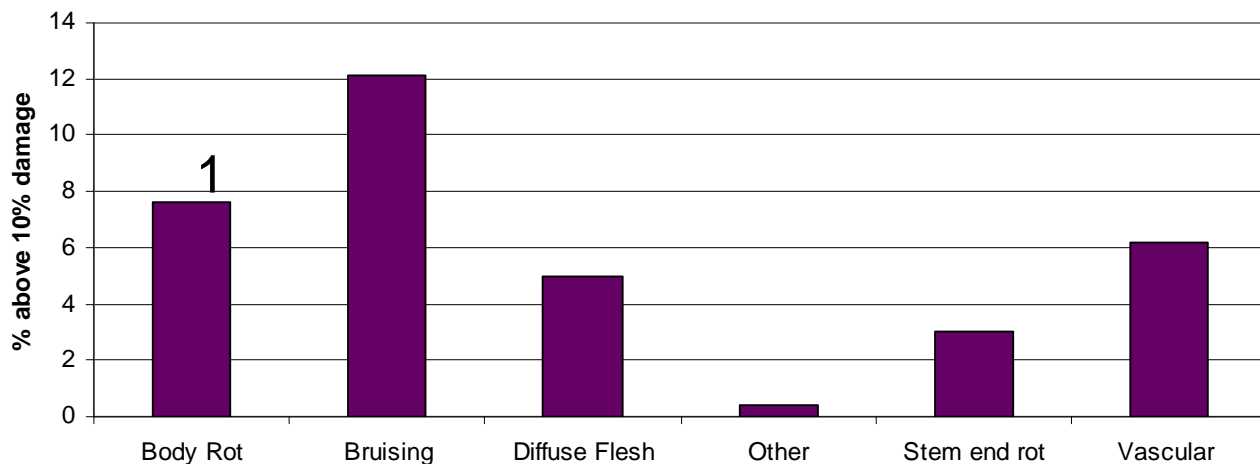


Total damage by store of purchase



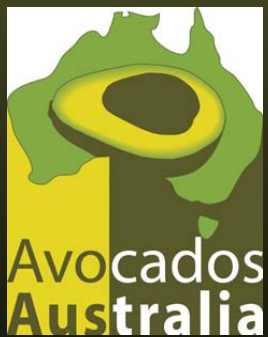
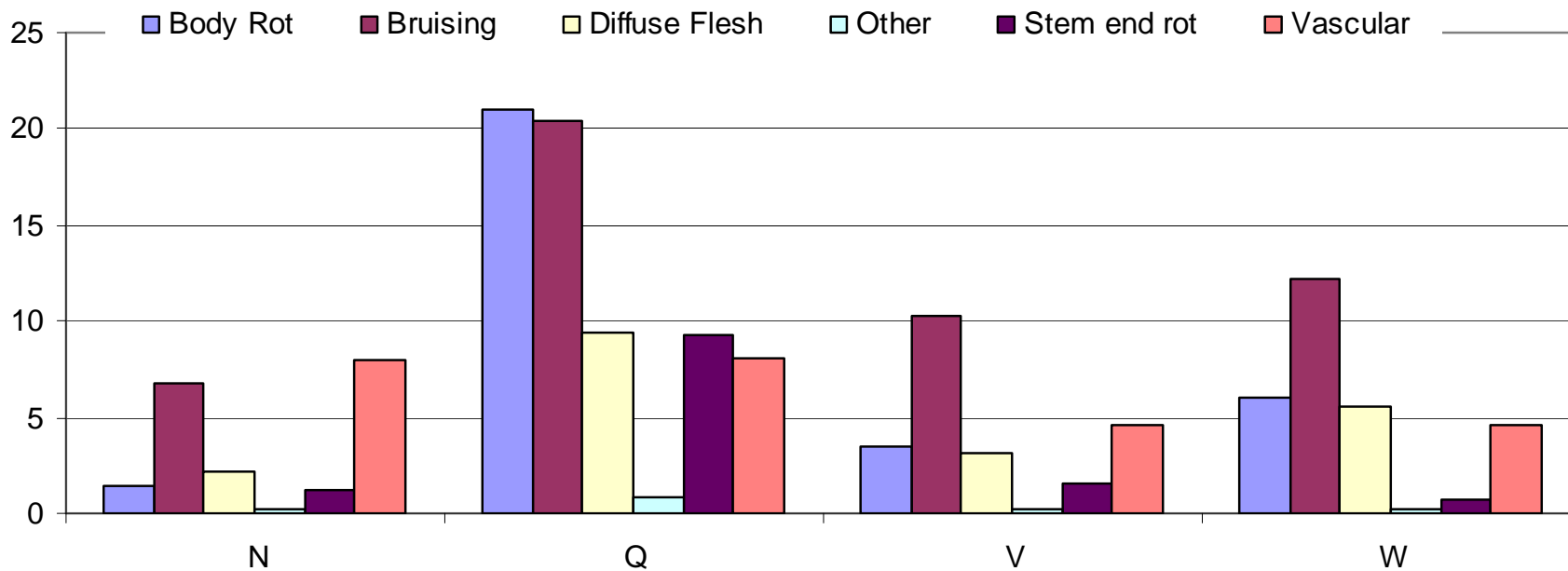
Key findings for 07/08

Proportion of fruit with specific damage above 10% damage



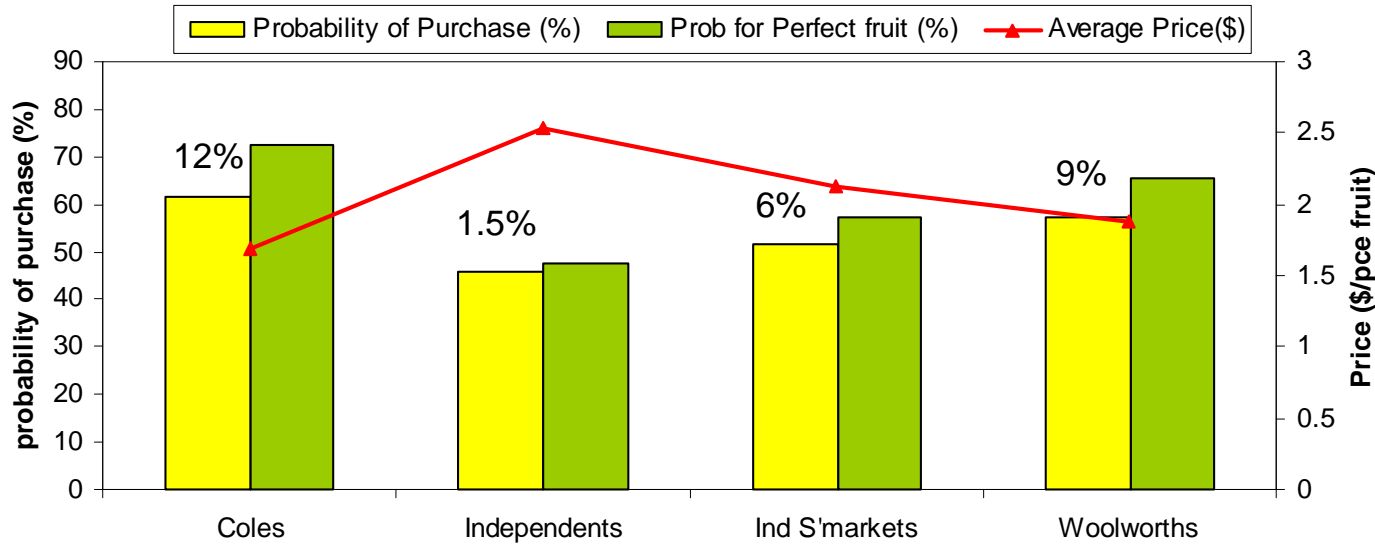
Bruising most common defect

Proportion of damage above 10% - by State



Key findings for 07/08

NSW probability of repurchase

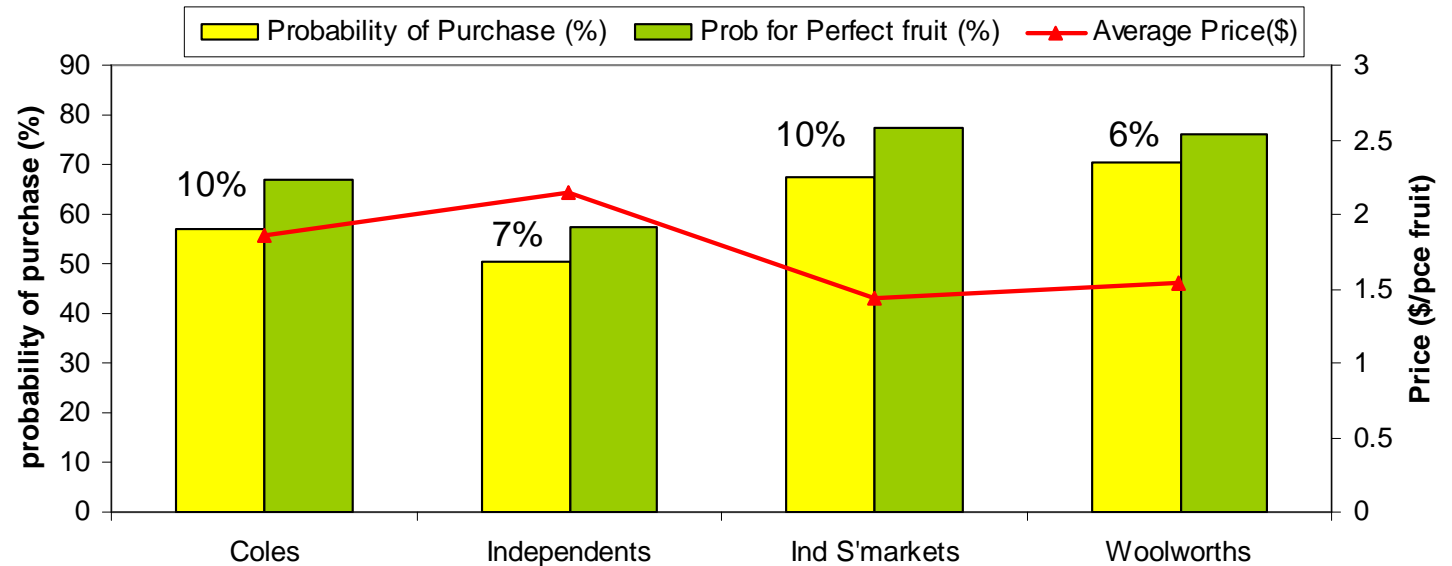


Cheaper fruit have higher predicted probability of purchase

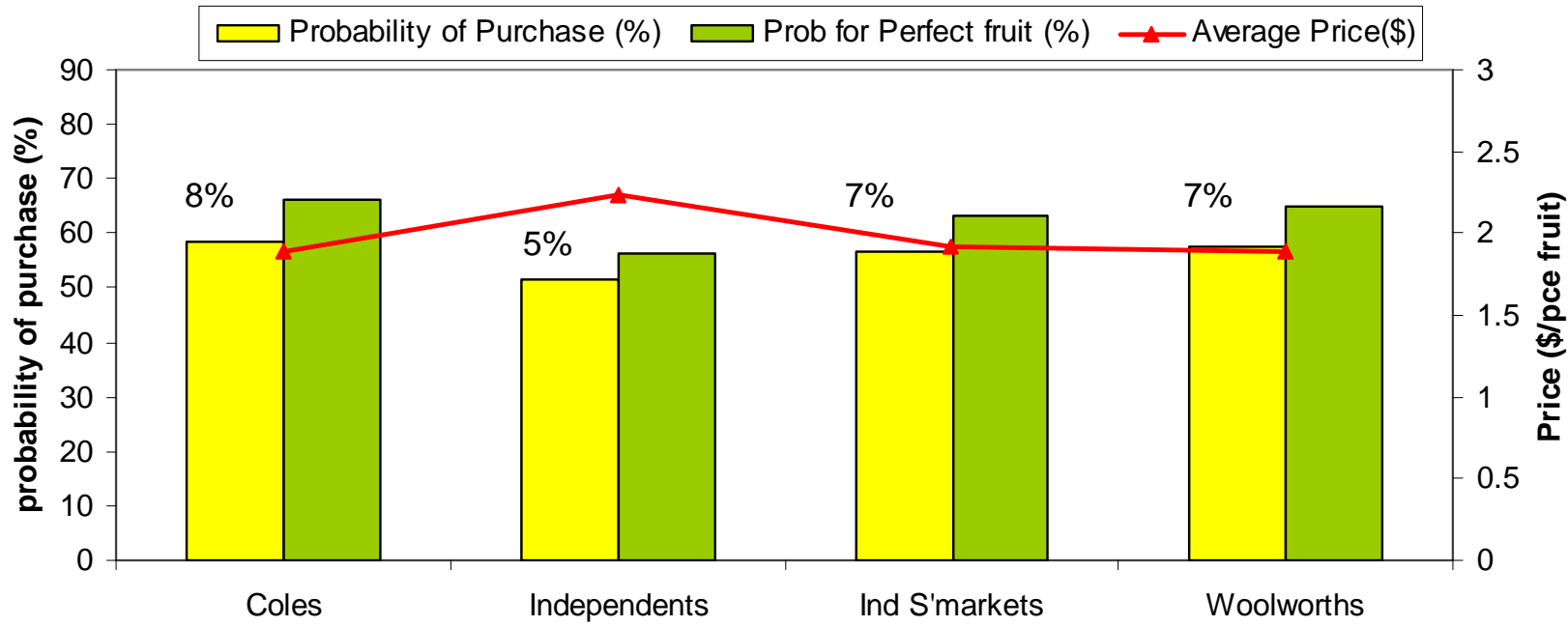
Cheaper fruit also had larger estimated reduction in purchase prob due to defects



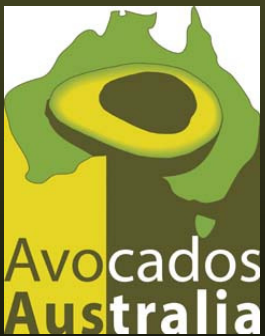
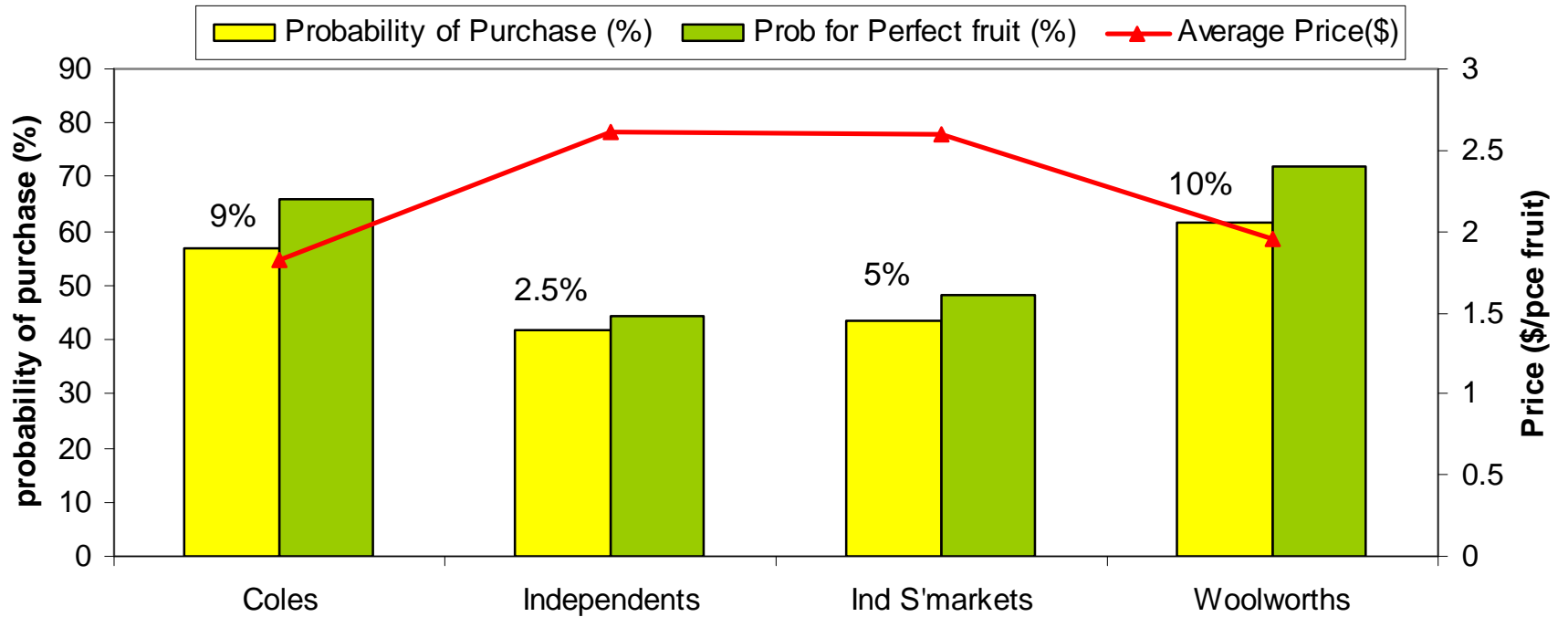
Qld probability of repurchase



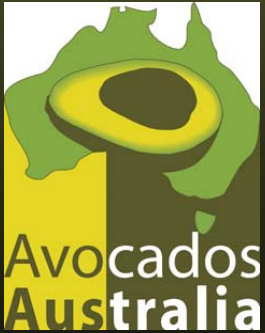
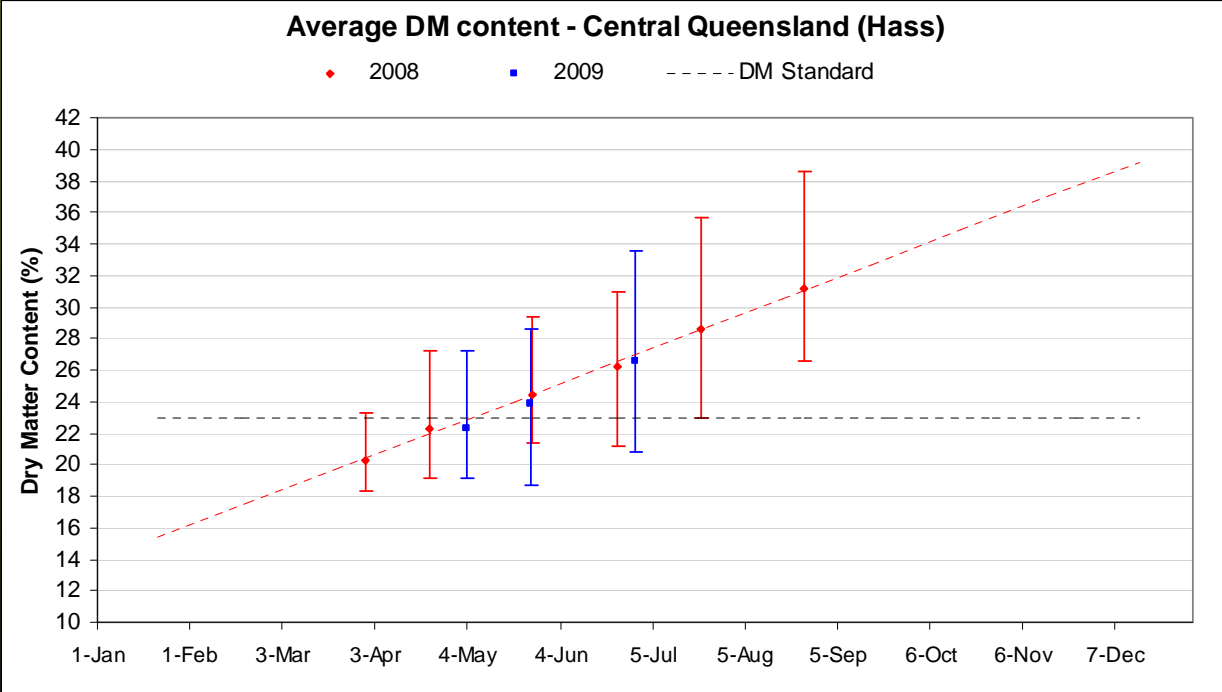
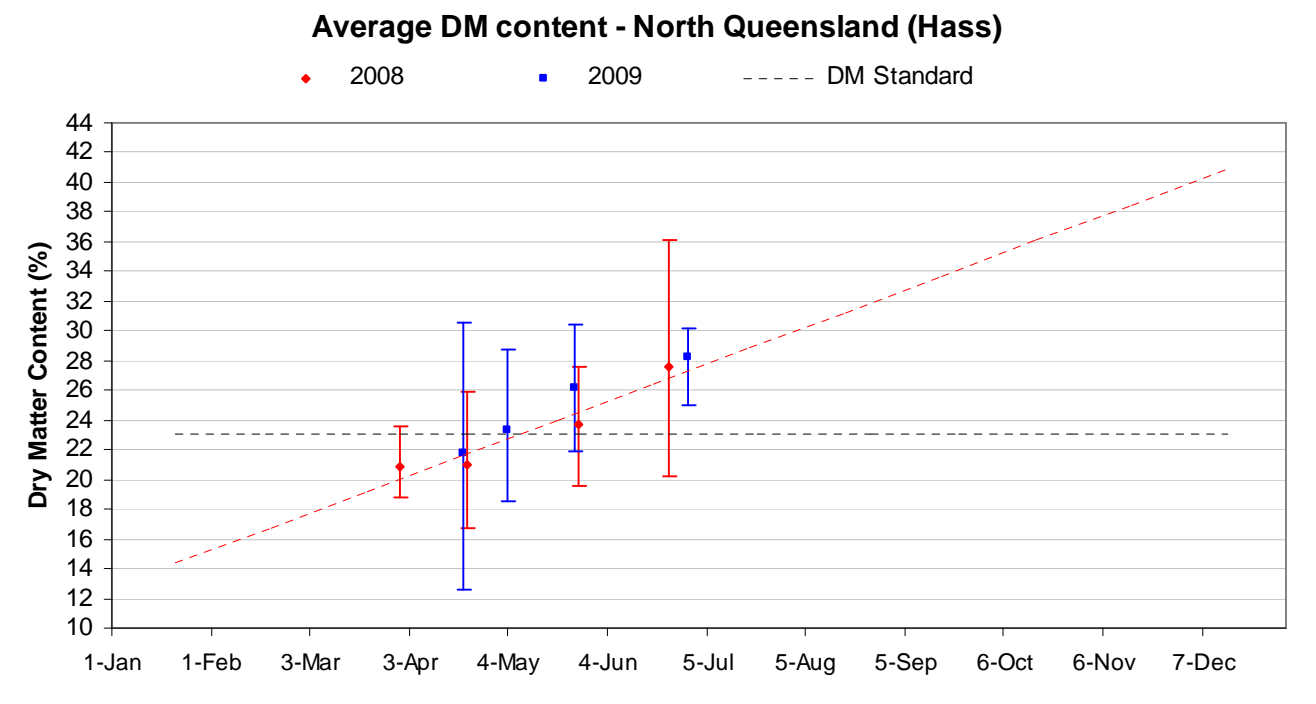
Vic probability of repurchase



WA probability of repurchase

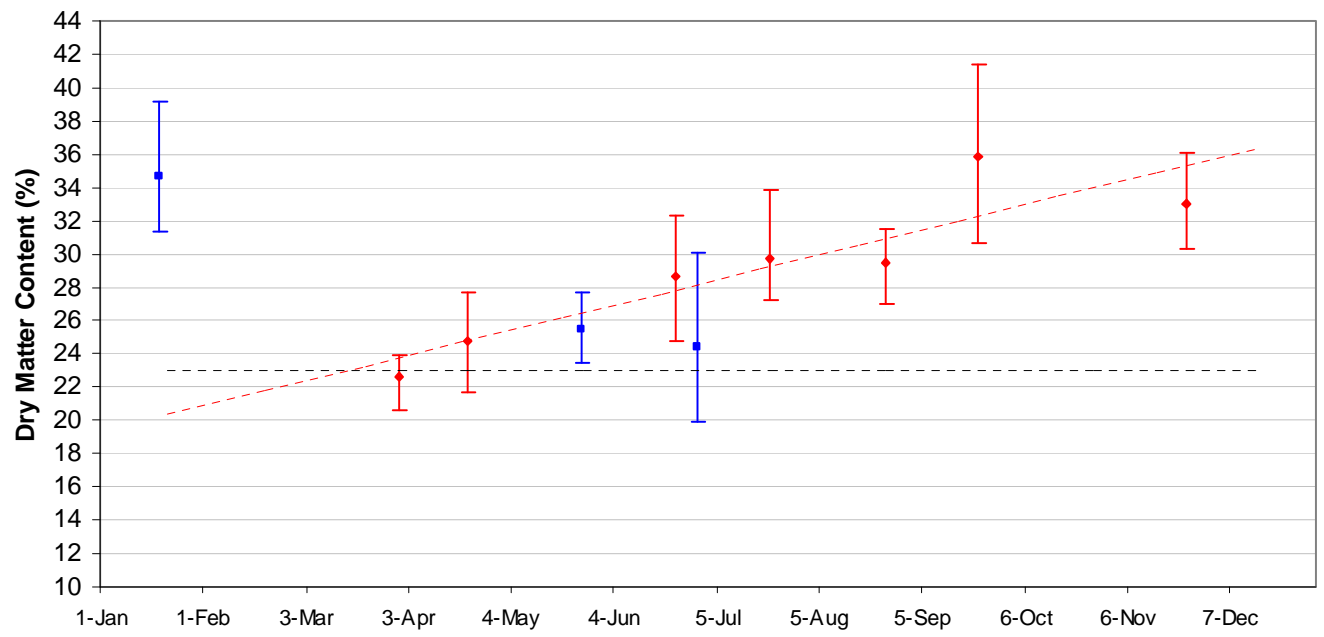


Maturity



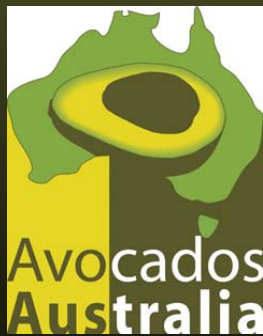
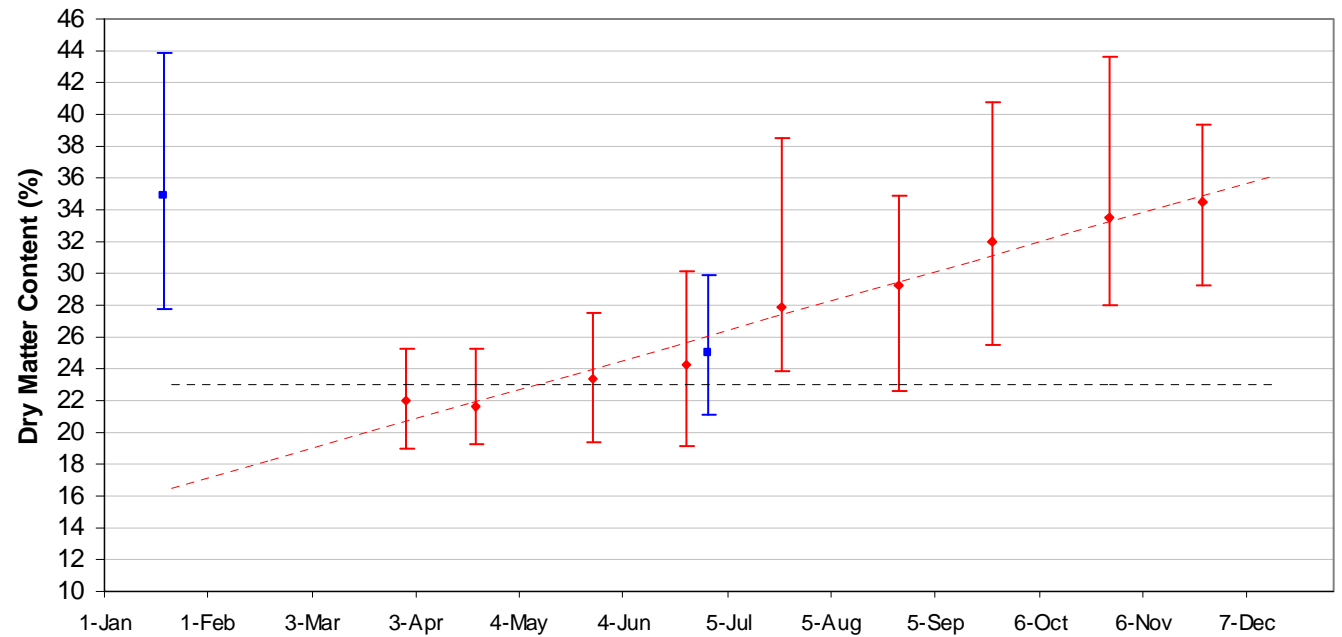
Average DM content - Sunshine Coast (Hass)

◆ 2008 ■ 2009 - - - - - DM Standard



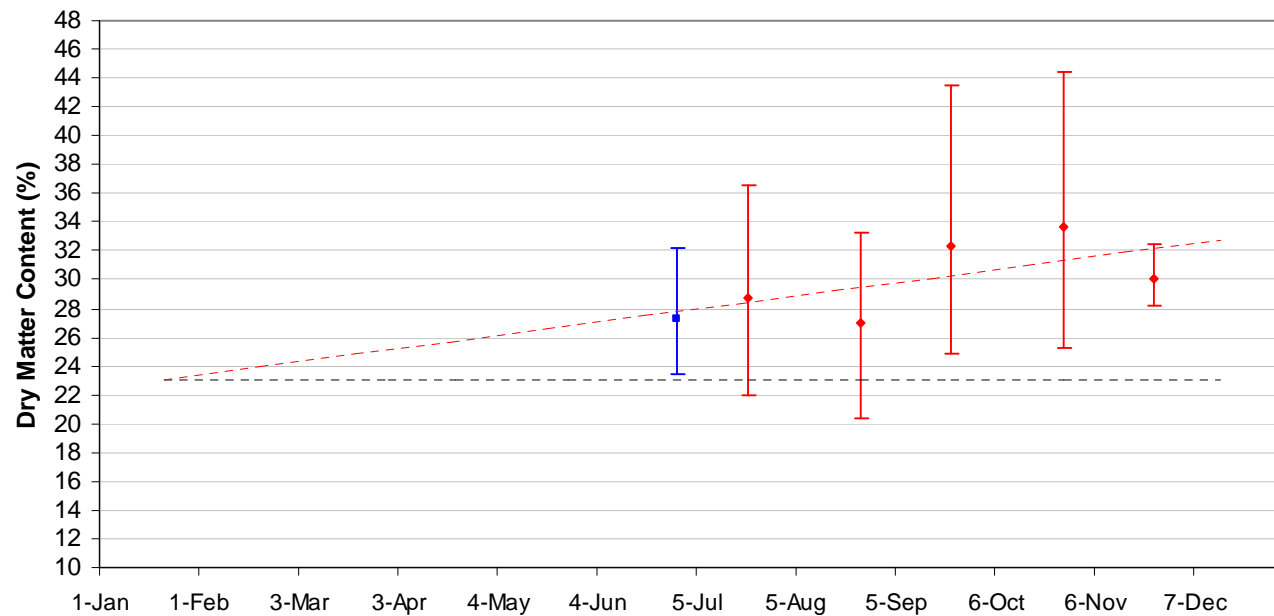
Average DM content - South Qld (Hass)

◆ 2008 ■ 2009 - - - - - DM Standard



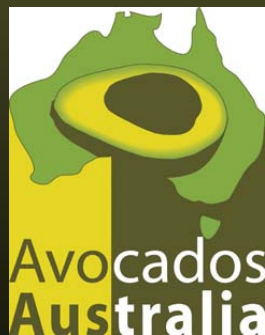
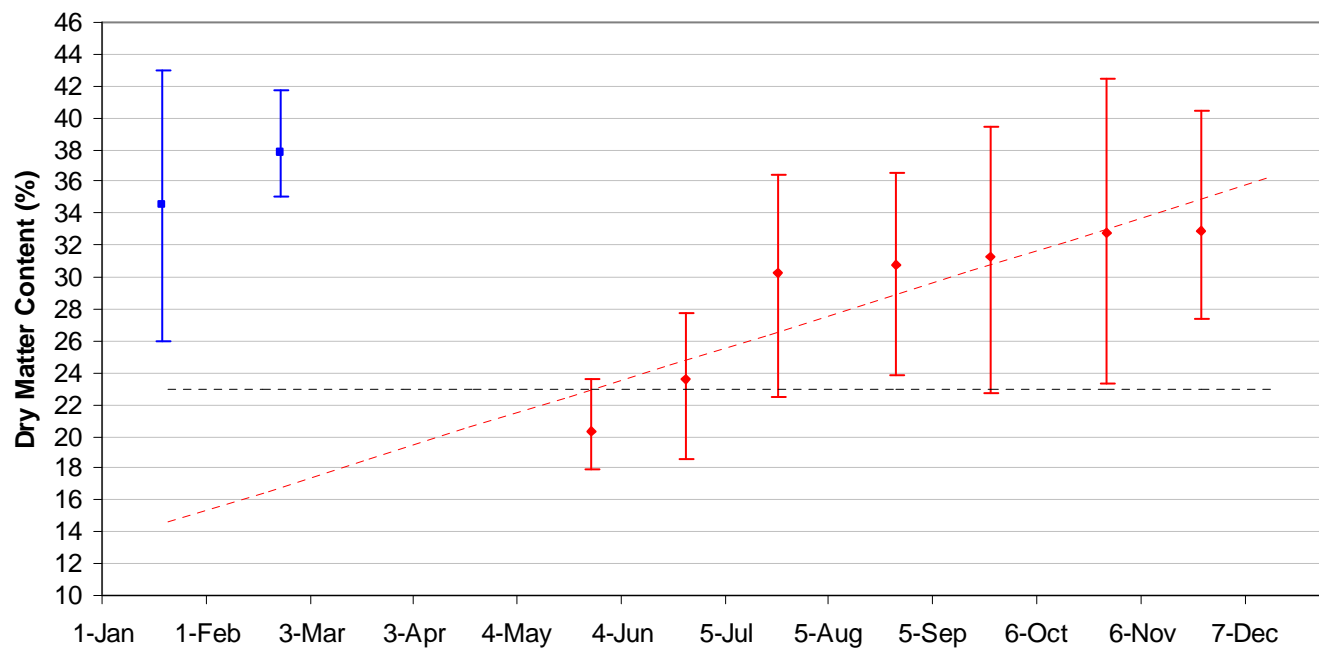
Average DM content - Northern NSW (Hass)

◆ 2008 ■ 2009 - - - - DM Standard



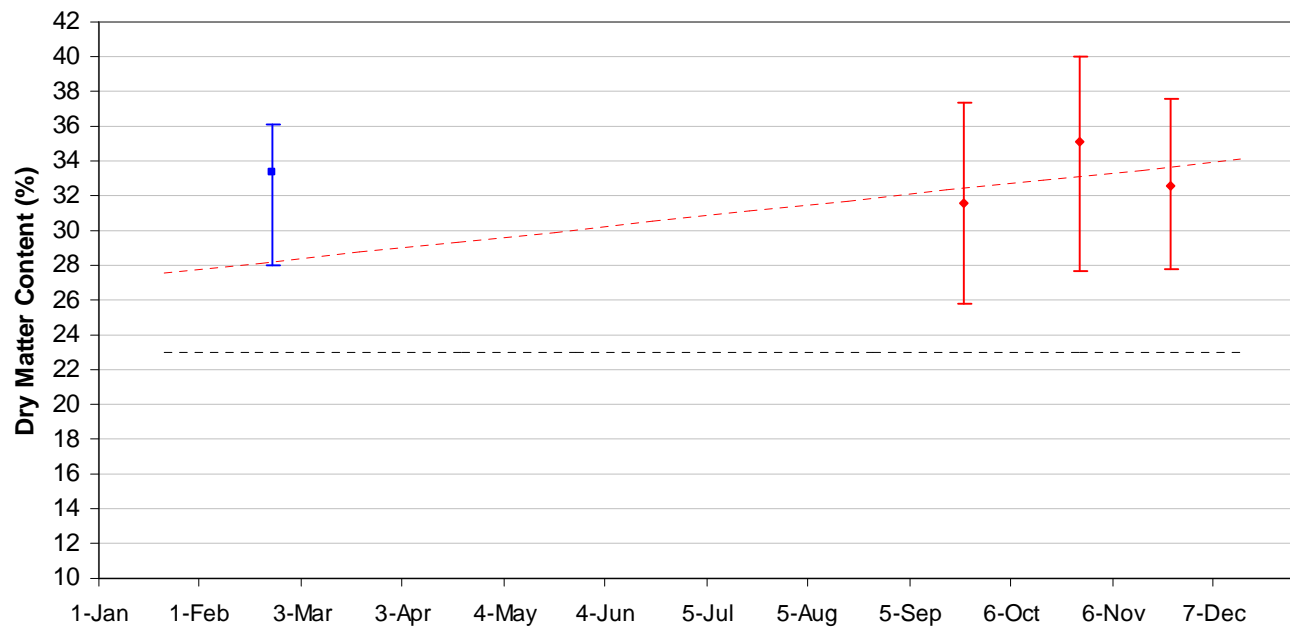
Average DM content - Central NSW (Hass)

◆ 2008 ■ 2009 - - - - DM Standard



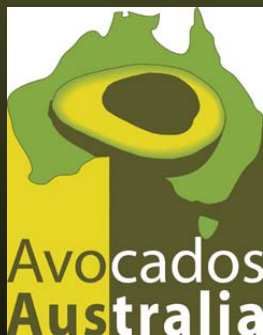
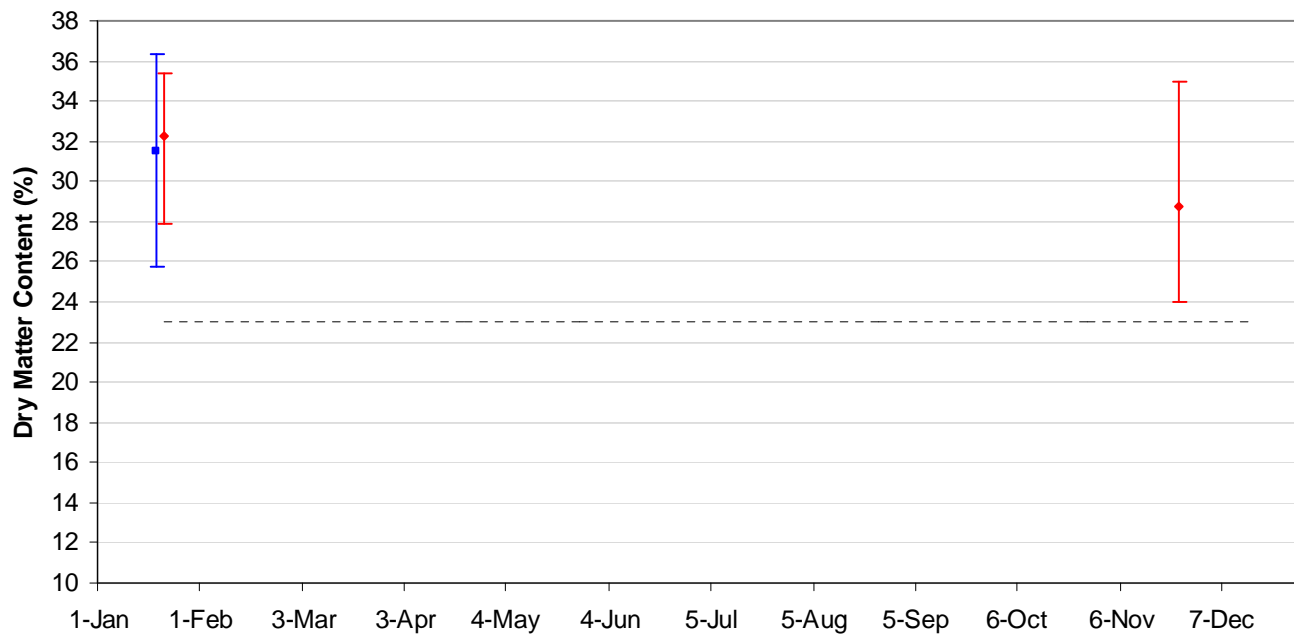
Average DM content - Tristate (Hass)

◆ 2008 ■ 2009 - - - - DM Standard



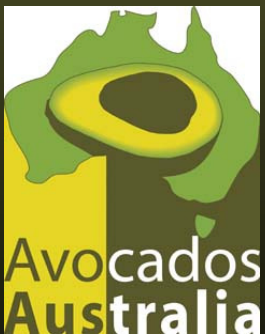
Average DM content - WA (Hass)

◆ 2008 ■ 2009 - - - - DM Standard



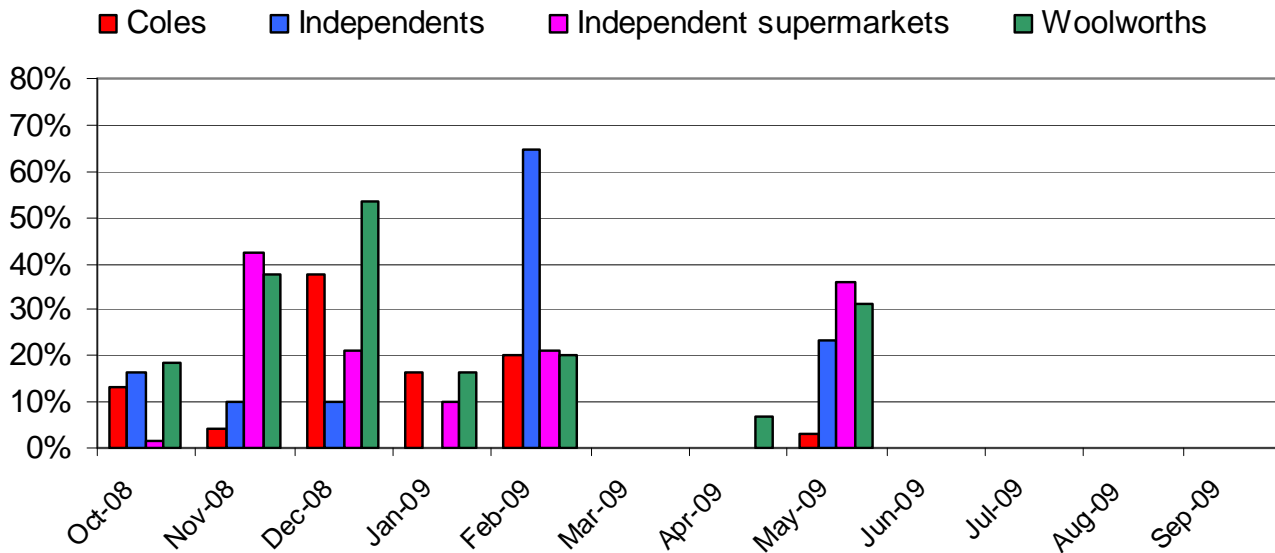
Where to from here?

- Working with supply chain partners to make improvements
- Working back from retailers who have consistently over time sold high quality fruit to assist in producing education materials
- Producing a series of education materials
- Continued quality surveys for monitoring and to measure improvements



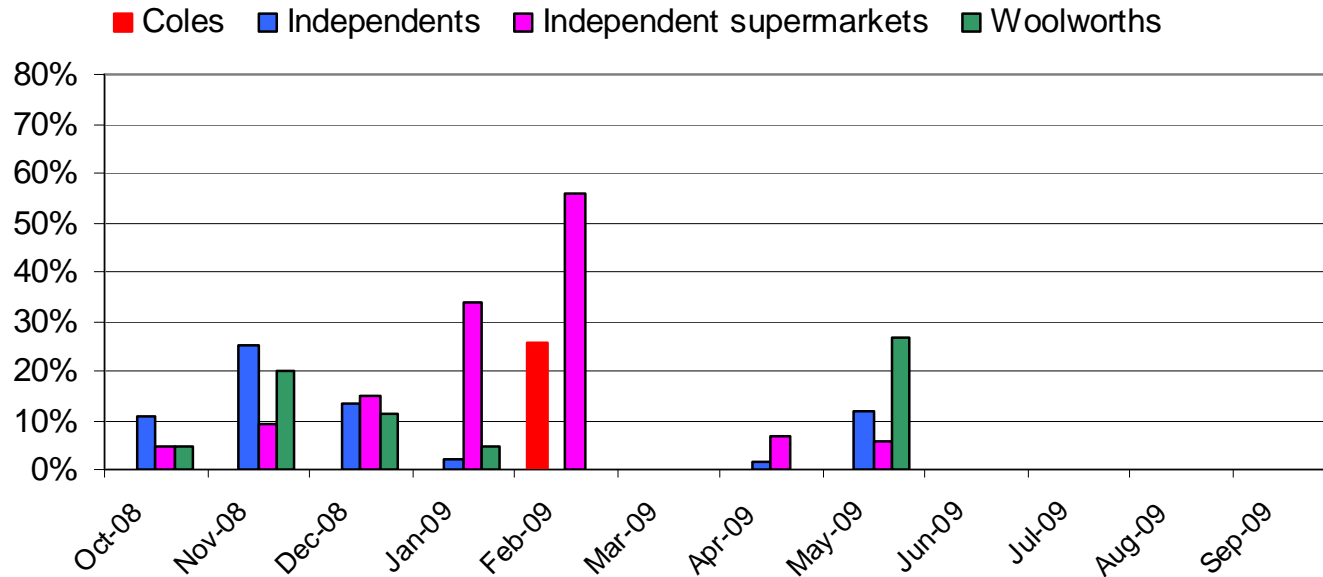
Proportion of Hass with internal damage above 10%

Sydney



Proportion of Hass with internal damage above 10%

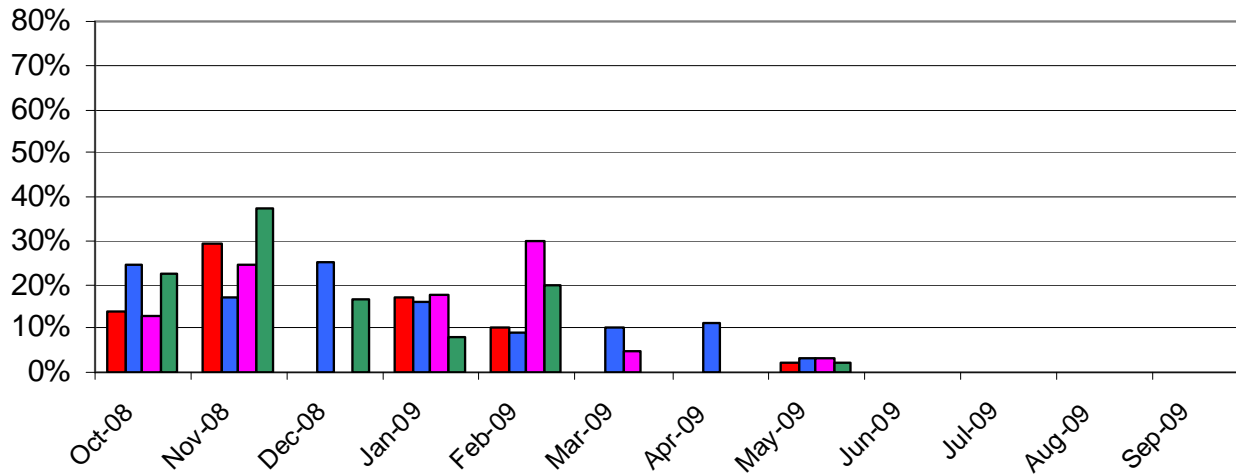
Brisbane



Proportion of Hass with internal damage above 10%

Melbourne

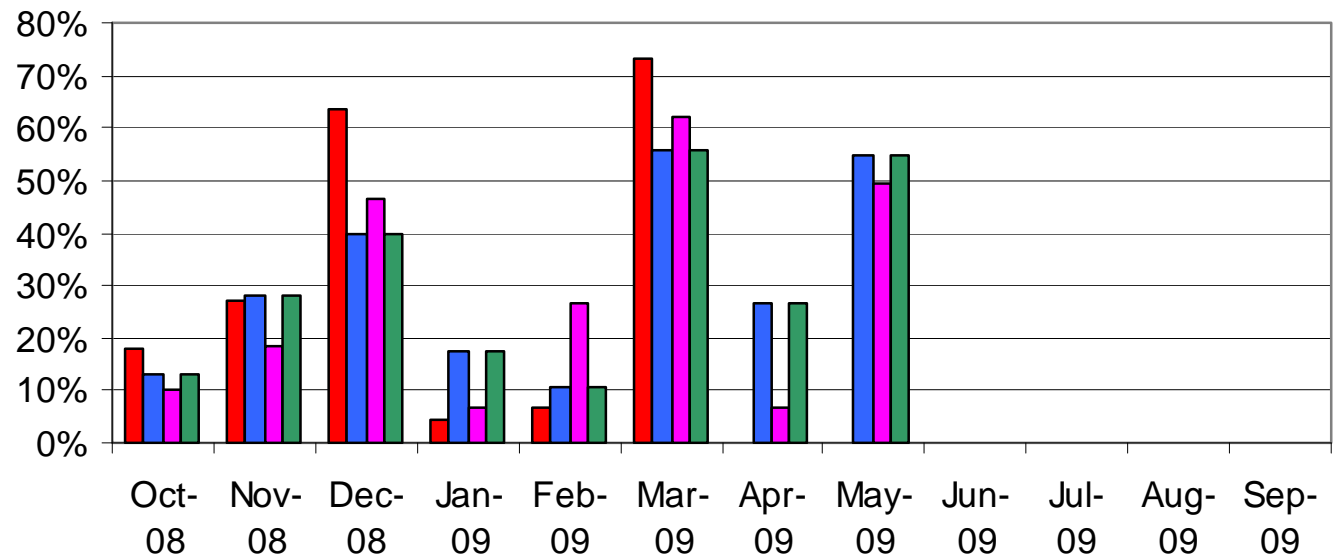
■ Coles ■ Independents ■ Independent supermarkets ■ Woolworths



Proportion of Hass with internal damage above 10%

Perth

■ Coles ■ Independents ■ Independent supermarkets ■ Woolworths



Thank you

