



INFOCADO WEEKLY REPORT: 13th — 19th August 2016 (Week 34)

Horticulture
Innovation
Australia

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Comments

- Tri State & WA packers and consolidators — if your season is about to start please start entering your four week forecast data.
- The weekly dispatch volume of 304,252 trays was slightly more than the forecast of 300,565 trays (refer P 2).
- Central Queensland fruit continues to be dominant in the market.
- New Zealand fruit is now entering the market. We have adjusted the New Zealand Avocado Export Table (P 2) to improve the clarity of data.
- Insufficient data was received from the NSW & WA wholesalers this week to provide a full wholesale report (refer P 5). Avocados Australia are currently contacting all non-contributing wholesalers to get a greater contribution to the weekly report.
- Online Weekly Retail Prices are provided for week 34 (Wed, 17th—Tues, 23rd Aug).
- **All packers are reminded to carefully monitor fruit maturity particularly in the early part of the harvest, to ensure consumer satisfaction which drives future purchases.**

Marketing Update: Waiting for an update from Horticulture Innovation Australia

Upcoming Holidays

Queen's Birthday (WA): 26th Sept | Labour Day (NSW & SA) & Queens' Birthday (QLD): 3rd Oct | Labour Day (NZ): 24th October |

Report Index

P2: 4 Weekly Forecasts and Import Data | P3: Dispatches | P4: Dispatches by Region and Contributors | P5: Wholesale Data | P6&7 Retail Price Data |

IMPORTANT and 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.

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This project has been funded by Horticulture Innovation Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 34 - 38)

Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv

Week 34 - begin 13/08/2016

Edrinol	100	8			115
Hass	243,260	19,570	20,600	13,000	284,951
Lamb Hass	2,000	1,000			3,818
Other	1,500	100			1,682
Reed	10,000				10,000
Week Total	256,860	20,678	20,600	13,000	300,565

Week 35 - begin 20/08/2016

Hass	248,791	19,302	20,800	13,000	290,032
Lamb Hass	2,000	1,000			3,818
Other	1,500	100			1,682
Reed	8,000				8,000
Sharwil	1,000	100			1,182
Week Total	261,291	20,502	20,800	13,000	304,713

Week 36 - begin 27/08/2016

Hass	235,447	18,822	20,800	13,000	275,815
Lamb Hass	2,000	1,000			3,818
Other	1,500	100			1,682
Reed	8,000				8,000
Week Total	246,947	19,922	20,800	13,000	289,315

Week 37 - begin 03/09/2016

Hass	241,705	16,232	20,800	8,000	276,455
Lamb Hass	2,000	1,000			3,818
Reed	8,000				8,000
Week Total	251,705	17,232	20,800	8,000	288,273

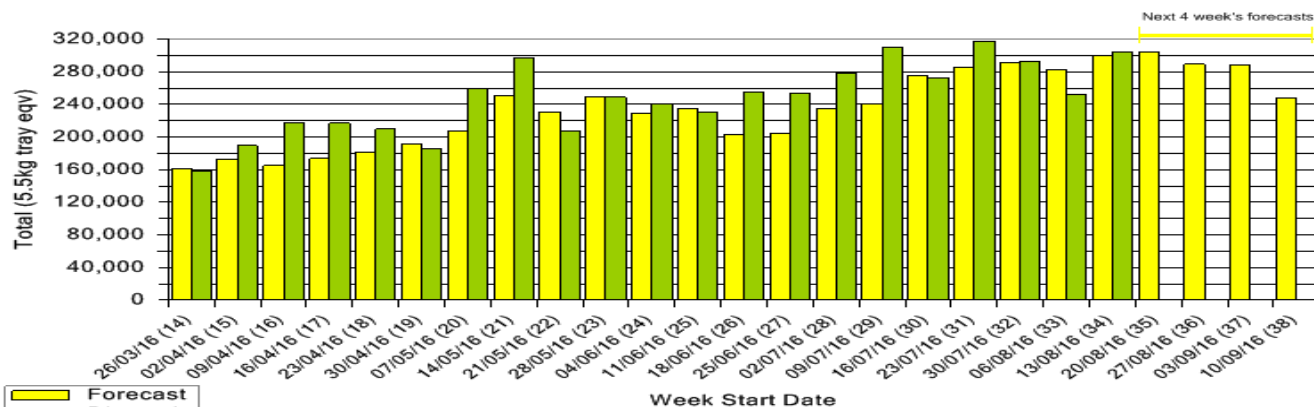
Week 38 - begin 10/09/2016

Hass	206,860	13,402	20,800	8,000	236,464
Lamb Hass	2,000	1,000			3,818
Reed	8,000				8,000
Week Total	216,860	14,402	20,800	8,000	248,282

Dispatch Data (Week 34 - begin 13/08/2016)

Variety	Trays 5.5Kg Eqv	Bulk 10Kg	P/PK Kg	Proc Kg	5.5Kg Eqv Total Trays
Fuerte	220	8			235
Hass	239,024	23,358	26,304	8,000	287,731
Lamb Hass	1,131	908			2,782
Other	2,193	124			2,418
Pinkerton		24			44
Reed	10,360				10,360
Sharwil	275	49			364
Wurtz	287	17			318
Total	253,490	24,488	26,304	8,000	304,252

Dispatch vs weekly forecast - all varieties and all packs
(26th March 2016 to 16th September 2016)



New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) July 2016 – April 2017

Export Destination	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	Total
NZ-Aus-Pre Season Forecast ¹	20,936	146,782	593,173	608,847	661,481	744,263	844,138	837,098	56,375	1,980	4,515,073
NZ-Aus-Season Forecast Updated (Aug 2016) ²	20,936	146,782	624,548	604,455	729,070	986,746	869,439	406,213	8,067	1,439	4,397,695
NZ-Aust-Infocado Dispatches ³	0	31,336									31,336
NZ Imports (from ABS)	NA*	NA*									
NZ-USA ⁴	NA**	NA**									
NZ-Japan ⁴	NA**	NA**									
NZ-Other Asia ⁴	NA**	NA**									
Total Dispatch (Infocado 3+4)	0	31,336	0	0	0	0	0	0	0	0	31,336

1 Source: Infocado data, Seasonal Forecast provided by NZ at start of season

2 Source: Infocado data, Updated Seasonal Forecast provided by NZ at time indicated in brackets

3 Source: Infocado data, Aggregated weekly dispatch data provided by NZ. Data for current month shows volume to date of current report

* Import data not yet available from ABS. ** Export data not yet available from Infoshare NZ (NZ Govt)

Industry Dispatches By Origin Region and Count Size : 13th August - 19th August 2016 (Wk 34)

Origin Region	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
Central NSW		3,256	7,085	11,137	4,960	14,348	9,108	7,519	364	57,777	1,761	24,000	8,000	66,798
Central Qld	1,187	9,007	8,804	20,267		16,831	19,971	10,231	6,839	93,137	9,317	1,704		110,387
New Zealand		1,047	1,892	4,065		3,542	4,629	2,375	2,577	20,127				20,127
North Qld	3	3	83	43						132				132
South Qld	15	361	3,313	5,988	779	6,043	6,023	4,708	2,126	29,356	5,916			40,112
Sunshine Coast	12	334	1,100	5,843	138	8,505	5,802	3,958	715	26,407	4,639			34,842
Tamborine/ Northern Rivers			24	62	35	20	158	98		397	31	600		562
Tri State	19	39	832	1,850		4,128	3,242	2,943	2,928	15,981	2,099			19,797
WA/NT	11	75	333	1,637		3,388	2,871	1,861		10,176	725			11,494
Total	1,247	14,122	23,466	50,892	5,912	56,805	51,804	33,693	15,549	253,490	24,488	26,304	8,000	304,252

Origin of Avocado



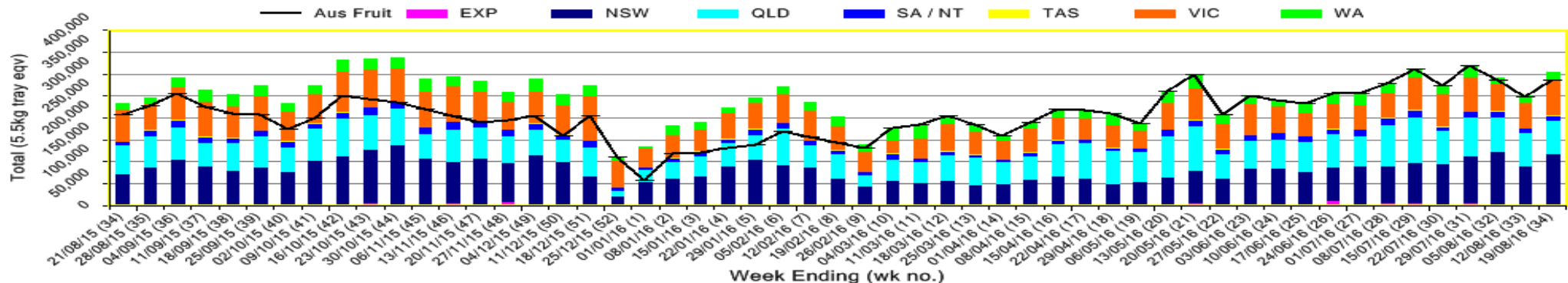
Destination of Avocado



Industry Dispatches By Destination State and Count Size : 13th August - 19th August 2016 (Wk 34)

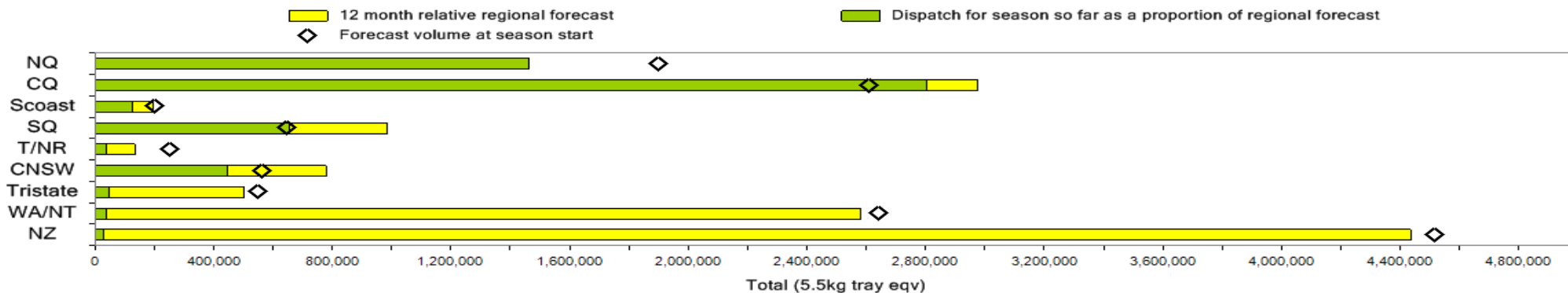
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
EXP									1,597	1,597	646			2,772
NSW	1,201	6,251	9,481	22,679	347	24,699	19,328	4,969	5,533	94,488	8,341	13,224	8,000	113,512
QLD	9	5,124	3,989	5,993	304	10,784	13,928	13,449	5,440	59,020	9,664	456		76,674
SA / NT	4	81	272	811		996	978	6,072		9,214	1,078	204		11,211
TAS								608		608	192			957
VIC	22	2,378	8,876	18,994	5,261	15,793	13,750	4,917	2,979	72,970	2,529	12,420		79,826
WA	11	288	848	2,415		4,533	3,820	3,678		15,593	2,038			19,298
Total	1,247	14,122	23,466	50,892	5,912	56,805	51,804	33,693	15,549	253,490	24,488	26,304	8,000	304,252

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2016 to date = 7,773,244 5.5kg tray eqv



NB: The graph below utilises the seasonal forecast data (without adjustment). The total of each bar in the below graph is a result of; Total Monthly Dispatches to date plus the remaining Seasonal Forecast which

Percentage dispatched by region (Based on seasonal forecast - 2016)



Week 34 Contributors - Packhouses

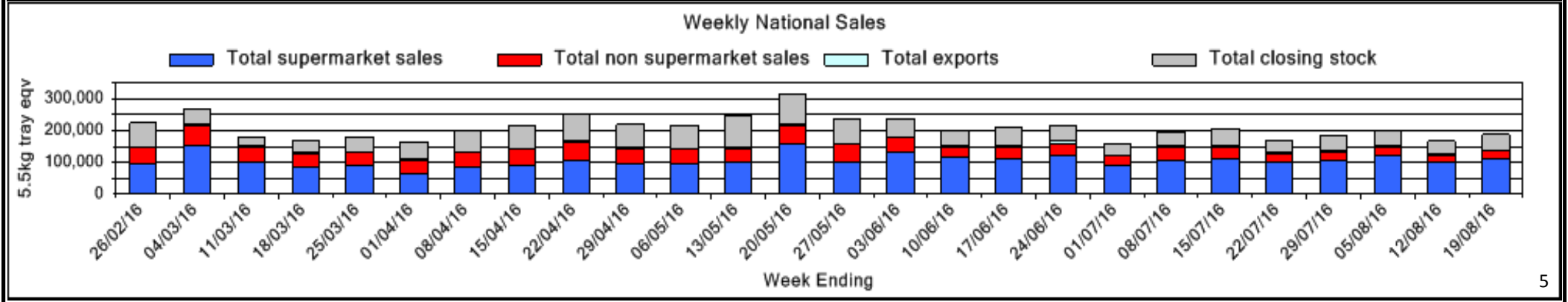
- Natures Fruit Company (Consolidator)
- Simpson Farms Pty Ltd (Consolidator)
- Sunfresh (Consolidator)
- The Avolution (Consolidator)
- Midcoast Avocados (CNSW)
- I & A Tolson (CNSW)
- Coastal Avocados (CNSW)
- SuperPak/Avocado Ridge (CQ)
- Lava Valley Produce (CQ)
- Donovan Family Investment Trust (CQ)
- Avocado Industry Council (NZAGA)
- Green Nugget Orchards (SQ)
- Mountain Fresh (SQ)
- Balmoral Orchard (SQ)
- Sunnyspot Packhouse Pty Ltd (SQ)
- Wodonga Park Fruit and Nuts (SQ)
- Touchwood Farming (SQ)
- Googa Farms (SQ)
- G & J Krenske (SQ)
- Mildura Fruit Company (TRI)
- J.G. Loffler (TRI)
- Golden Hill Packing Pty Ltd (TRI)
- Barham Avocados (TRI)
- The Avocado Grove (WA)
- Avowest (WA)
- Green Pear Avocado (WA)
- NQ: Less than 3 packhouse contributors
- SC: Less than 3 packhouse contributors
- TNR: Less than 3 packhouse contributors

Week 34 Contributors - Wholesalers

- Alfred E Chave Pty Ltd (Brisbane)
- Allcrops Pty Ltd (Sydney)
- Costa Farms (Adelaide)
- Costa Farms (Brisbane)
- Costa Farms (Melbourne)
- Etherington (Perth)
- Favco Queensland Pty Ltd (Brisbane)
- Fresh Choice WA Pty Ltd (Perth)
- Murray Bros (Brisbane)
- Sinclair & Antico (Aust) Pty Ltd (Sydney)
- The La Manna Group (Adelaide)
- The La Manna Group (Brisbane)
- The La Manna Group (Melbourne)
- United Fresh (Adelaide)
- VB Sculli (Melbourne)

Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

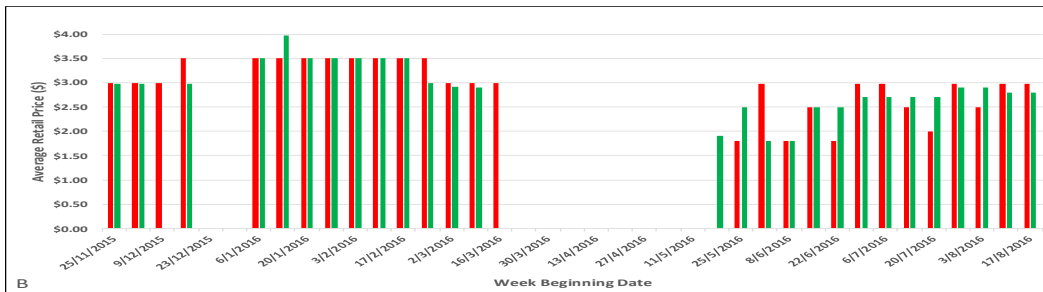
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total supermarket sales	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total non supermarket sales	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total exports	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total sales	42,035		4,905	46,940	1,480			1,480	2,691	11,224			11,224	2,041	46,767		4,905	51,671
Total Stock on Hand																		
QLD																		
Total supermarket sales	23,269		5,281	28,550	981			981	1,784	456			456	83	25,136		5,281	30,416
Total non supermarket sales	1,882			1,882	254			254	462						2,344			2,344
Total exports	1,747			1,747	550			550	1,000						2,747			2,747
Total sales	26,898		5,281	32,178	1,785			1,785	3,245	456			456	83	30,226		5,281	35,507
Total Stock on Hand	18,346			18,346	118			118	215						18,560			18,560
SA & TAS																		
Total supermarket sales	8,893			8,893	200			200	364	204			204	37	9,294			9,294
Total non supermarket sales	4,893		2	4,895	535		25	560	1,018						5,866		47	5,913
Total exports																		
Total sales	13,786		2	13,788	735		25	760	1,382	204			204	37	15,159		47	15,207
Total Stock on Hand	15,440		108	15,548	716		32	748	1,360						16,742		166	16,908
VIC																		
Total supermarket sales	17,791			17,791	288			288	524	12,420			12,420	2,258	20,573			20,573
Total non supermarket sales	9,027		539	9,566	328			328	596						9,623		539	10,162
Total exports																		
Total sales	26,818		539	27,357	616			616	1,120	12,420			12,420	2,258	30,196		539	30,735
Total Stock on Hand	5,818		67	5,885	158			158	287						6,105		67	6,173
WA	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total supermarket sales	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total non supermarket sales	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total exports	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total sales	3,423			3,423	1,268			1,268	2,305	68			68	12	5,741			5,741
Total Stock on Hand																		
Total																		
Total supermarket sales	91,108		10,028	101,136	2,535			2,535	4,609	24,372			24,372	4,431	100,148		10,028	110,177
Total non supermarket sales	20,104		698	20,802	2,703		25	2,728	4,960						25,019		743	25,762
Total exports	1,747			1,747	646			646	1,175						2,922			2,922
Total sales	112,959		10,726	123,686	5,884		25	5,909	10,744	24,372			24,372	4,431	128,089		10,772	138,860
Total Stock on Hand	45,634		378	46,012	1,199		32	1,231	2,238						47,814		437	48,250



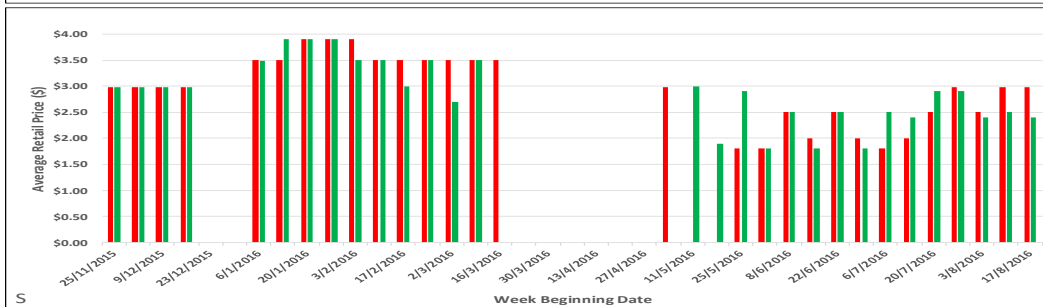
Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 17th August July 2016 (Week 34)

Key: ■ Coles online ■ Woolworths online

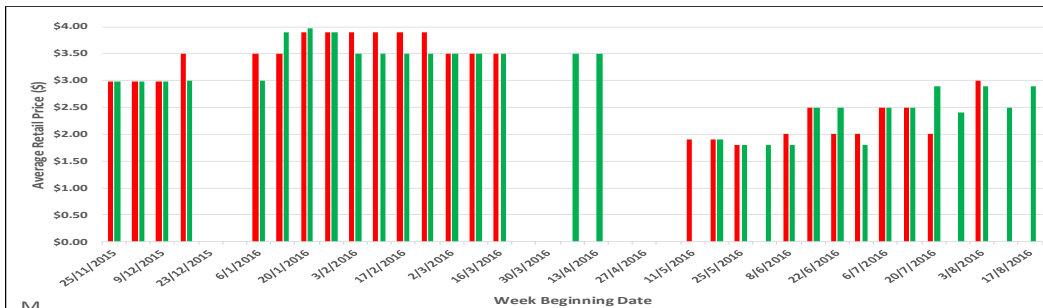
Brisbane



Sydney



Melbourne



Notes:

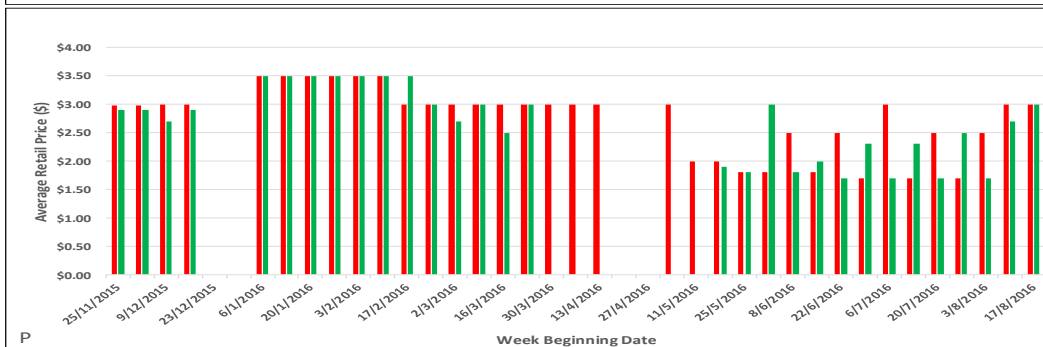
15/06/16 (Wk25), 22/06/16 (Wk26) & 29/06/16 (Wk27)

Please note that Woolworths online prices for single fruit purchases in Melbourne differed depending on the store location. In the graph we have shown the higher price. For details of pricing in a given week please refer to previous reports.

27/07/16 (Wk31), 10/08/16 (Wk33) & 17/08/16 (Wk34)

Please note that Coles online prices for single fruit purchases in Melbourne were unavailable for week 31, 33 & 34.

Perth



Single Fruit, Multi-buy and Pack Pricing for Week Beginning - Wed, 17th Aug August 2016 (Week 34)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	Single Fruit		\$2.98	\$2.98	-	\$3.00
	Hass	Multi-buy	2 for \$x	↓2 for \$4*	-	-	2 for \$4*
	Reed	Single Fruit		\$3.00	\$2.98	-	-
	Reed	Multi-buy	2 for \$x	2 for \$4	-	-	-
	Unknown**	Single Fruit	Organic	\$4.00	\$4.00	-	-
	Hass	2 Pack	Organic	-	-	-	-
	Hass	3 Pack		\$5.90	\$5.90	\$5.90	-
Woolworths	Hass	Single Fruit		\$2.80	↓\$2.40	↑\$2.90	↑\$3.00
	Hass	Multi-buy	2 for \$x	2 for \$5*	↓2 for \$4*	↑2 for \$5*	↑2 for \$5
	Shepard	Single Fruit		-	-	-	-
	Shepard	Multi-buy	2 for \$x	-	-	-	-
	Hass	Single Fruit	Organic	\$4.50	-	\$4.50	-
	Unknown**	2 Pack	Ripe	-	\$7.00	\$6.90	-
	Hass	2 Pack	Organic	↓\$4.00	\$4.98	\$4.98	-
	Unknown**	3 Pack		\$5.90	\$4.50	\$5.90	\$4.98
	Hass	4 Pack	Mini Ripe	-	-	-	-
	Unknown**	5 Pack	Mini Disney	\$3.90	\$4.00	\$2.90	\$2.70
	Unknown**	1kg Bag	Odd Bunch	↓\$5.40 ^a \$5.90 ^a	\$5.90	\$4.90	↑\$5.98

Other information

Note: Online catalogues are published by major retailers each Wednesday.

Prices published in this report are reflective of online shopping and catalogue prices from Wednesday to Tuesday.

*denotes offer was advertised as a weekly and/or catalogue special

**denotes variety not indicated in online shopping offer

^adenotes online pricing for 1kg Odd Bunch Bags are differing depending on the store location

(Green) + ↑ = increase in price from previous week

(Yellow) = same price as previous week

(Red) + ↓ = decrease in price from previous week

Catalogue Offers

Aldi - National - No catalogue offers found

IGA - Perth - Unknown - 1kg pack - \$4.99

Foodworks - No catalogue offers found

Woolworths - Sydney - Hass - Single fruit - \$2.40 & Multi-buy - 2 for \$4

Woolworths - Sydney - Hass - Single fruit from NZ - \$3.50

Coles - No catalogue offers found