



INFOCADO WEEKLY REPORT: 17th Sept — 23rd Sept 2016 (Week 39)

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Comments

- WA packers and consolidators — if your season is about to start please start entering your four week forecast data.
- The weekly dispatch volume of 291,934 trays was higher than the forecast of 277,240 trays (refer P 2).
- The main supply is now coming from New Zealand, Western Australia and Central NSW.
- Please note the New Zealand Avocado Export Table (P 2) has been adjusted to improve the clarity of data
- Online Weekly Retail Prices are provided for week 39 (Wed, 21st Sept. —Tues, 27th Sept).
- **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: Digital Communications

Between 22 and 21 December, publisher Totally Her will feature Australian Avocados in the content series titled #NeedMoreAvocados that will be broadcast across a collection of female digital properties including Momtastic, She Knows and The Fashion Spot. We are expecting to deliver over 1.5 million impressions across these placements focusing on strong consumer engagement.

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 39 - 43)

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

Week 39 - begin 17/09/2016

Hass	242,596	12,254	16,000	8,000	269,240
Reed	8,000				8,000
Week Total	250,596	12,254	16,000	8,000	277,240

Week 40 - begin 24/09/2016

Hass	263,096	11,478	16,000	8,000	288,329
Week Total	263,096	11,478	16,000	8,000	288,329

Week 41 - begin 01/10/2016

Hass	250,250	10,402	16,100	8,000	273,545
Week Total	250,250	10,402	16,100	8,000	273,545

Week 42 - begin 08/10/2016

Hass	260,648	17,156	15,900	8,000	296,187
Week Total	260,648	17,156	15,900	8,000	296,187

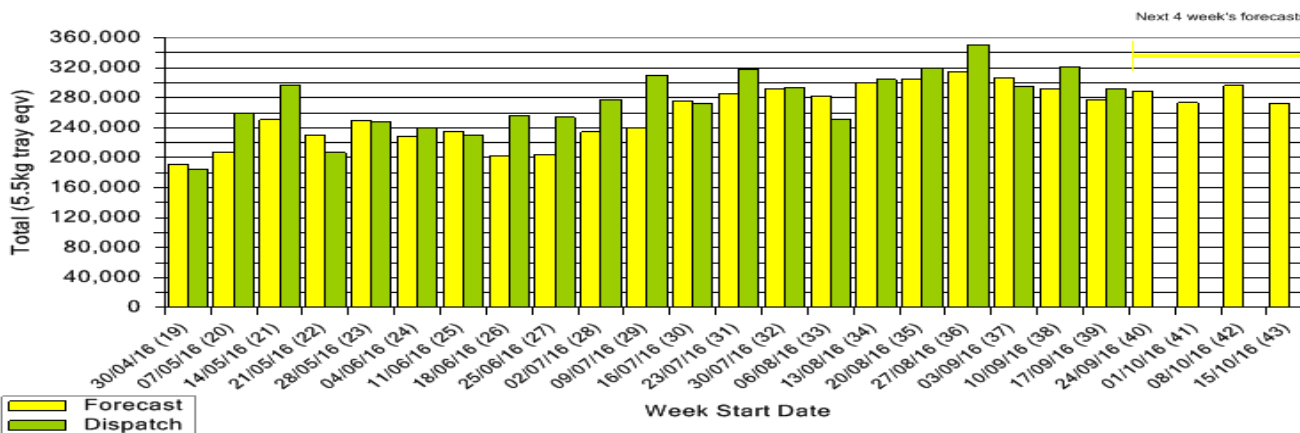
Week 43 - begin 15/10/2016

Hass	253,300	8,602	15,000	8,000	273,122
Week Total	253,300	8,602	15,000	8,000	273,122

Dispatch Data (Week 39 - begin 17/09/2016)

Variety	Trays 5.5Kg Eqv	Bulk 10Kg	P/PK Kg	Proc Kg	5.5Kg Eqv Total Trays
Fuerte		24			24
Gem					164
Gwen	696	126			822
Hass	257,410	12,748	20,037	12,000	282,195
Lamb Hass	465	177			642
Other	157	7			164
Reed	3,259	22			3,281
Total	262,011	13,254	20,037	12,000	291,934

Dispatch vs weekly forecast - all varieties and all packs (30th April 2016 to 21st October 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 Forecast¹	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 Dispatches³	0	98,497	331,658 ^c								430,155
NZ Imports (from ABS)	0	NA ^{ac}	NA ^{ac}								0
NZ-USA⁴	0	NA ^{bc}	NA ^{bc}								0
NZ-Japan⁴	0	NA ^{bc}	NA ^{bc}								0
NZ-Other Asia⁴	180	60 ^{bc}	NA ^{bc}								240
Total Dispatch (Infocado 3+4)	180	98,557	331,658								430,395

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
 (a) Import data not yet available from ABS. (b) Export data not yet available from Infoshare NZ (NZ Govt) (c) Data not complete for month

Industry Dispatches By Origin Region and Count Size : 17th September - 23rd September 2016 (Wk 39)

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		3,779	8,029	10,016		6,968	5,724	3,702	231	38,449	2,495	20,000	12,000	48,803
Central Qld		236	2,438	5,271		5,638	4,153	3,799	257	21,792	172			22,105
New Zealand		4,385	7,927	17,037		14,843	19,397	9,952	10,794	84,335				84,335
North Qld			17	43		154	56	51		321	115			530
South Qld	29	230	1,596	4,079	678	4,544	5,405	4,690	1,905	23,156	4,713			31,725
Sunshine Coast		11	106	583	267	1,847	1,701	1,507	291	6,313	909			7,966
Tamborine/ Northern Rivers		870	1,474	2,038	1,719	215	651	416	303	7,686	261	37		8,168
Tri State	1	94	1,306	2,205	72	3,852	3,964	4,338	1,655	17,487	2,057			21,227
WA/NT	27	371	3,114	16,525		18,442	15,695	7,388	910	62,472	2,532			67,076
	57	9,976	26,007	57,797	2,736	56,503	56,746	35,843	16,346	262,011	13,254	20,037	12,000	291,934

Origin of Avocado



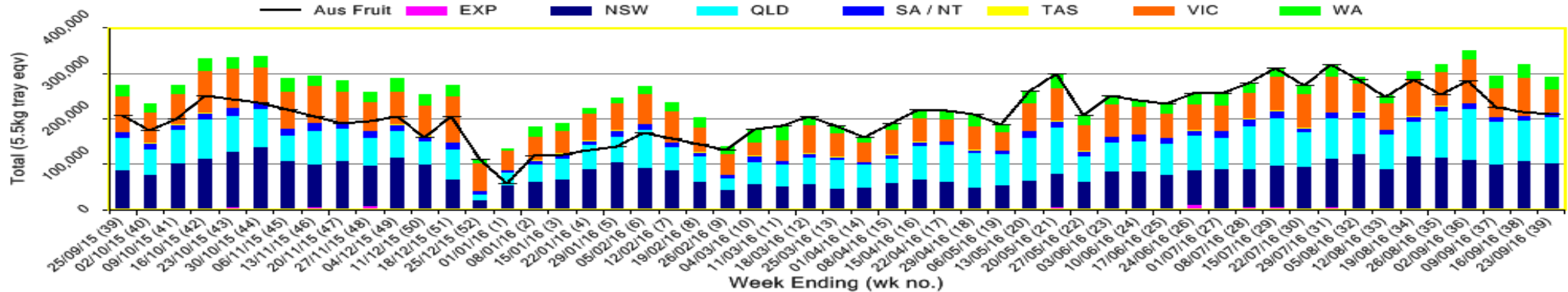
Destination of Avocado



Industry Dispatches By Destination State and Count Size : 17th September - 23rd September 2016 (Wk 39)

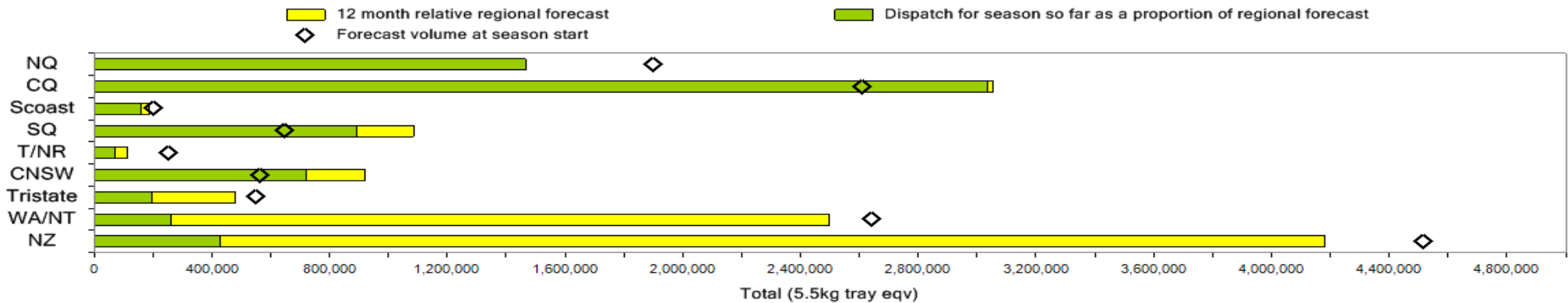
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
EXP									280	280				280
NSW	39	3,644	10,974	23,645	611	23,195	15,894	3,200	2,330	83,532	6,482	20,009	8,000	100,410
QLD	1	3,614	7,288	16,680	1,990	14,618	26,481	16,630	9,760	97,062	3,148	28	4,000	103,518
SA / NT		6	66	213	72	504	2,464	5,370		8,695	599			9,784
VIC	9	2,278	4,765	14,021	63	11,754	7,340	5,167	2,836	48,233	1,177			50,373
WA	8	434	2,914	3,238		6,432	4,567	5,476	1,140	24,209	1,848			27,569
Total	57	9,976	26,007	57,797	2,736	56,503	56,746	35,843	16,346	262,011	13,254	20,037	12,000	291,934

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2016 to date = 9,352,552 5.5kg tray eqv



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

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



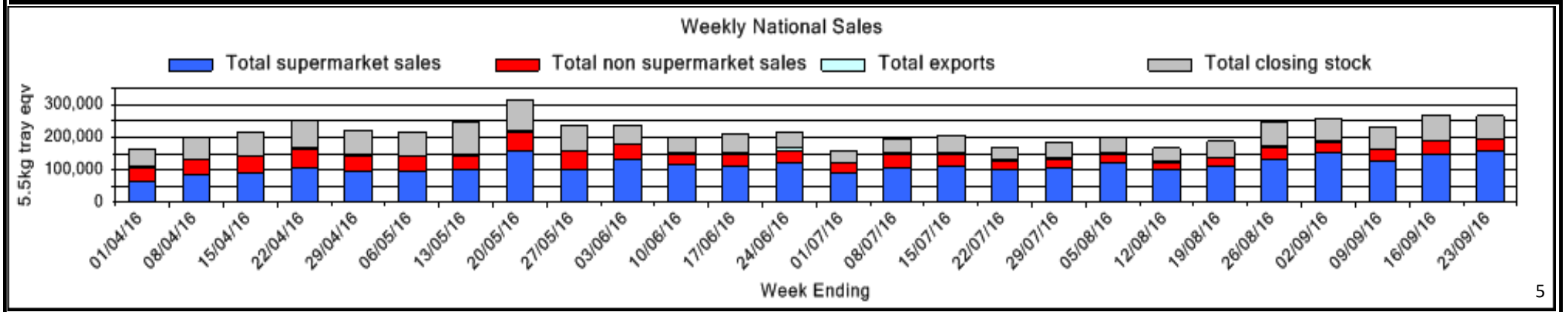
Week 39 Contributors - Packhouses

Natures Fruit Company (Consolidator)	Wodonga Park Fruit and Nuts (SQ)	Golden Hill Packing Pty Ltd (TRI)
Simpson Farms Pty Ltd (Consolidator)	Googa Farms (SQ)	Klingbiel Family Trust (TRI)
Sunfresh (Consolidator)	Jirel Holdings (TNR)	The Avocado Grove (WA)
The Avolution (Consolidator)	WJ Row (TNR)	Avowest (WA)
Midcoast Avocados (CNSW)	Aussie Orchards Growers & Packers (TNR)	Avonova (WA)
Coastal Avocados (CNSW)	KV & JM Lehmann (TRI)	Green Pear Avocado (WA)
I & A Tolson (CNSW)	J.G. Loffler (TRI)	Delroy Orchards (WA)
Avocado Industry Council (NZAGA)	Chinoola Orchards (TRI)	CQ: Less than 3 Packhouse Contributors
Green Nugget Orchards (SQ)	Barham Avocados (TRI)	SC: Less than 3 Packhouse Contributors
Balmoral Orchard (SQ)	Mildura Fruit Company (TRI)	

Week 39 Contributors - Wholesalers

Allcrops Pty Ltd (Sydney)	Murray Bros (Brisbane)
Costa Farms (Adelaide)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Brisbane)	The La Manna Group (Adelaide)
Costa Farms (Melbourne)	The La Manna Group (Brisbane)
De Luca Banana Marketing Pty Ltd (Brisbane)	United Fresh (Adelaide)
Etherington (Perth)	VB Sculli (Melbourne)
Fresh Choice WA Pty Ltd (Perth)	WA Farm Direct (Perth)

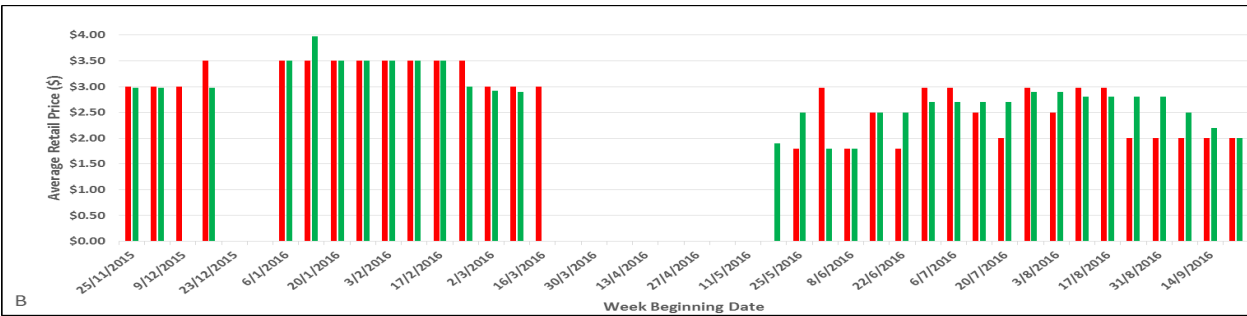
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data 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																		
Total sales	44,829		1,609	46,438	730			730	1,327						46,156		1,609	47,765
Total Stock on Hand																		
QLD																		
Total supermarket sales	67,177		800	67,977	335			335	609	28			28	5	67,791		800	68,591
Total non supermarket sales	8,147		85	8,232	511			511	929						9,076		85	9,161
Total exports	280			280											280			280
Total sales	75,604		885	76,489	846			846	1,538	28			28	5	77,147		885	78,032
Total Stock on Hand	30,671			30,671	14			14	25						30,696			30,696
SA & TAS																		
Total supermarket sales	10,498			10,498											10,498			10,498
Total non supermarket sales	4,367		292	4,659	1,285			1,285	2,336						6,703		292	6,995
Total exports																		
Total sales	14,865		292	15,157	1,285			1,285	2,336						17,201		292	17,493
Total Stock on Hand	12,464		294	12,758	1,436			1,436	2,611						15,075		294	15,369
VIC	Full data set not displayed because not enough VIC wholesalers contributed data this week																	
Total supermarket sales	Full data set not displayed because not enough VIC wholesalers contributed data this week																	
Total non supermarket sales	Full data set not displayed because not enough VIC wholesalers contributed data this week																	
Total exports																		
Total sales	28,354		807	29,161	1,147		44	1,191	2,165						30,439		887	31,326
Total Stock on Hand																		
WA																		
Total supermarket sales	12,134			12,134	1,119			1,119	2,035						14,169			14,169
Total non supermarket sales	5,150			5,150	481			481	875						6,025			6,025
Total exports																		
Total sales	17,284			17,284	1,600			1,600	2,909						20,193			20,193
Total Stock on Hand	7,190		15	7,205	159			159	289						7,479		15	7,494
Total																		
Total supermarket sales	152,926		3,216	156,142	1,982			1,982	3,604	28			28	5	156,535		3,216	159,751
Total non supermarket sales	27,730		377	28,107	3,626		44	3,670	6,673						34,323		457	34,780
Total exports	280			280											280			280
Total sales	180,936		3,593	184,529	5,608		44	5,652	10,276	28			28	5	191,137		3,673	194,810
Total Stock on Hand	65,676		790	66,466	2,435		29	2,464	4,480						70,103		843	70,946



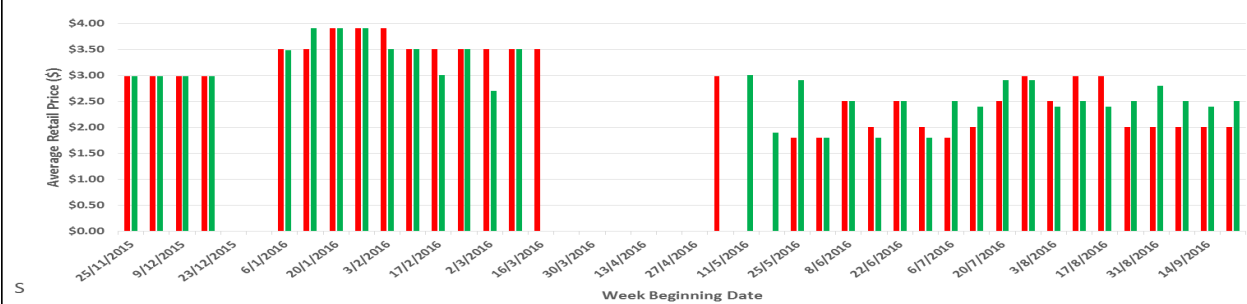
Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 21st September 2016 (Week 39)

Key: ■ Coles online ■ Woolworths online

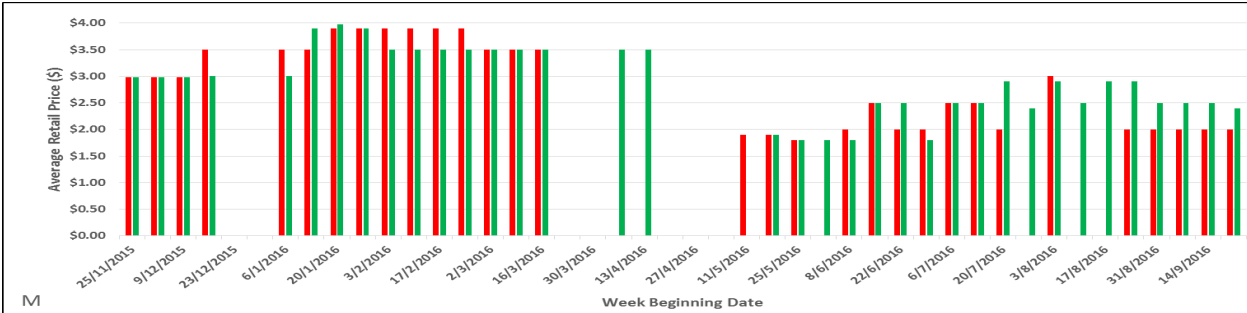
Brisbane



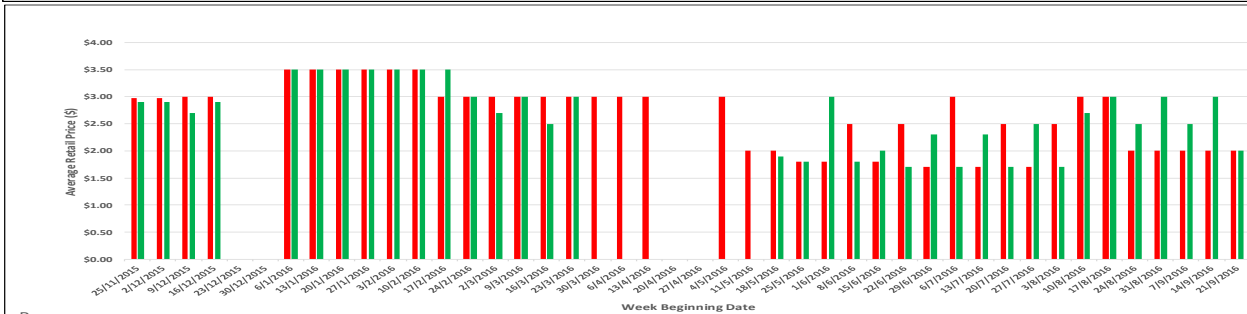
Sydney



Melbourne



Perth



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.

Single Fruit, Multi-buy and Pack Pricing for Week Beginning - Wed, 21st September 2016 (Week 39)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	Single Fruit		\$2.00*	\$2.00	\$2.00*	\$2.00
	Hass	Multi-buy	2 for \$x				
	Reed	Single Fruit		\$2.00	\$2.00		
	Reed	Multi-buy	2 for \$x				
	Unknown**	Single Fruit	Organic	\$4.00	\$4.00	\$4.00	
	Unknown**	2 Pack	Organic		\$5.00	\$7.00	
	Hass	3 Pack		\$5.90	\$4.90	\$4.90	\$4.90
Woolworths	Hass	Single Fruit		↓\$2.00	↑\$2.50	↓\$2.40	↓\$2.00
	Hass	Multi-buy	2 for \$x	2 for \$3.50*		↓2 for \$4.00*	↓2 for \$3.30*
	Hass	Single Fruit	Organic				
	Unknown**	2 Pack	Ripe	\$6.40	\$7.00	\$6.90	
	Hass	2 Pack	Organic	↓\$3.50*	↑\$4.40	↑\$4.40	
	Unknown**	3 Pack		\$4.90	\$3.90/↑\$5.90	↑\$4.90	\$4.90
	Unknown**	5 Pack	Mini Disney	\$3.90	\$4.00	↑\$3.90	\$4.00
	Unknown**	1kg Bag	Odd Bunch		↑\$5.90	↑\$5.90	

Catalogue Offers

Aldi - National - Hass - Single fruit - \$1.29
 IGA - Sydney - Hass - Single fruit - \$1.99 - Multi-buy - 2 for \$3.00
 Foodworks - Perth - South West WA Avocados - 3 pack - \$2.99 & \$5.00
 Foodworks - Melbourne - Hass - Multi-buy - 2 for \$4.00
 Woolworths - Perth - Hass - Single fruit - \$2.00 - Multi-buy - 2 for \$3.30
 Woolworths - Melbourne - Hass - Single fruit - \$2.40 - Multi-buy - 2 for \$4.00
 Coles - Brisbane - Hass - Multi-buy 2 for \$3.00
 Coles - Brisbane - Hass Organic - 2 pack - \$3.50
 Coles - Perth - Hass (WA) - Multi-buy 2 for \$4.00

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

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

(Yellow) = same price as previous week

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