



## INFOCADO WEEKLY REPORT: 1st — 7th March 2014 (Wk 10)



### Comments

- Reed avocados have achieved the highest retail price recorded by our assessors this week in Sydney with the average price of Shepard and Hass hovering around an average of \$4.50 across the major city retail markets.
- The weekly dispatches have fallen short of previous weekly forecast figures again for the fourth week running which may be due to people contributing their forecasts previously, although not following through with their actual dispatches. All contributors are encouraged to try and be consistent and as accurate as they can be to improve to accuracy of the weekly reports.
- With New Zealand imports reducing as the end of their season is approaching, Australian Avocados are now dominating the domestic marketplace.
- The Sydney Metro Qualicado workshop will be held at the Sydney Markets Conference Centre on the 13th March 2014. AAL would like to invite all wholesalers, ripeners and transporters in the area to attend.

### What you need to be aware of for next month

The new advertising campaign for Australian Avocados will launch in the week commencing 27 April. Originally scheduled for mid-March this revised timing has been recommended by the IAC to better align the advertising investment with stronger overall fruit availability, identified through the Infocado data.

With the April dispatches forecast to increase by 44% over March dispatch forecasts this presents a significant opportunity for advertising. It allows the building of consumer awareness with an increase of avocados supplying the market.

The timing of the launch will ensure media ratings are at their most effective with consumers back in their normal routine with the April school holidays and Easter period past. The national television media campaign will run for 7 weeks over May and June initially featuring the new 30 second commercial then also supported by a 15 second version for increased frequency.

Both formats are ideal for video online advertising which will run over an extended 9 week period featured through catch up TV as well as targeted sites. This approach to media advertising is consistent with the Australian Avocados strategic marketing plan recommendation for investment in more concentrated media bursts that are timed to seasonal fruit availability.

### Upcoming Holidays

Easter: 18th—21st April | Anzac Day: 25th April

### Report Index

P2: Dispatches | P3: 4 Weekly Forecasts and Import Data | P4: Dispatches by Region and Contributors | P5: Wholesale data | P6-8: Retail Pricing data

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#### IMPORTANT and PLEASE NOTE:

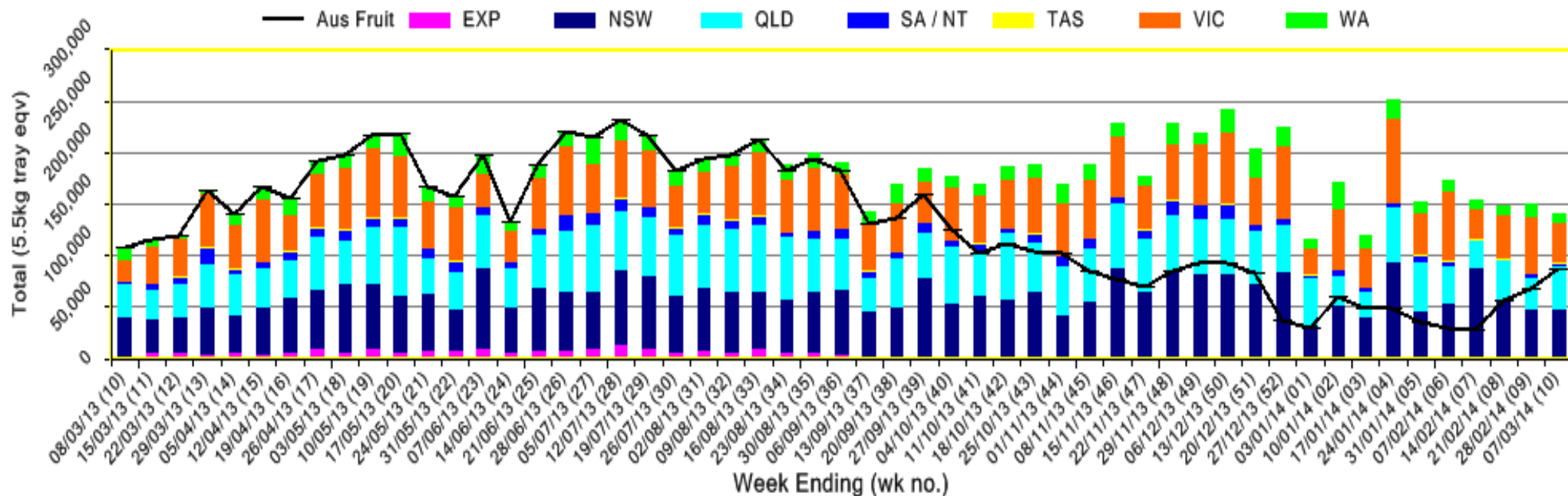
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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**Industry Dispatches By Destination State and Count Size : 1st March - 7th March 2014 (Wk 10)**

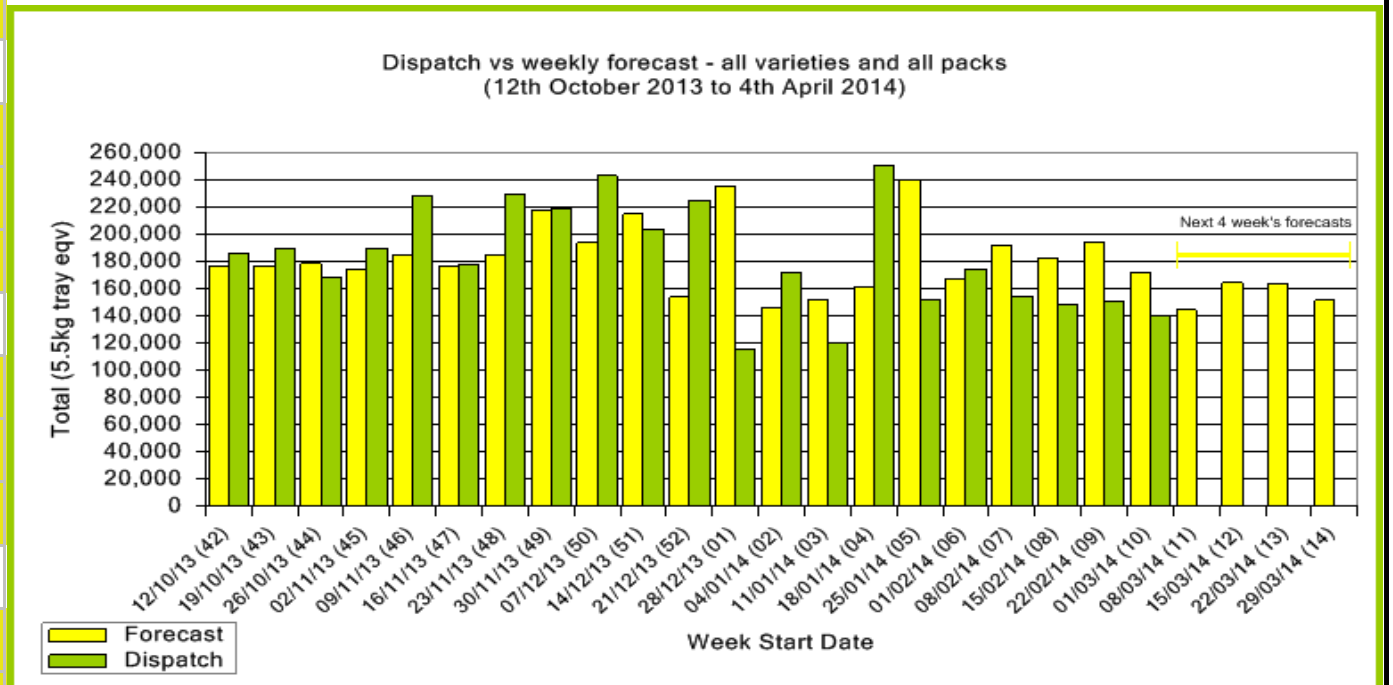
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total	
EXP										640	640				640
NSW	4	1,330	4,441	7,257	1,055	9,070	6,749	7,165	6,832	43,903	1,206	6,600		47,296	
QLD		286	1,513	3,824	982	4,309	13,310	7,590	2,761	34,575	2,756	6,000	2,000	41,041	
SA / NT		5	118	538		20	448	1,168		2,297	95	1,200		2,688	
TAS								1,096	800	1,896				1,896	
VIC		517	1,923	7,135	1,803	11,527	4,413	3,913	2,348	33,579	1,967	6,600		38,355	
WA		206	480	1,071		1,662	1,550	1,722	1,876	8,567				8,567	
<b>Total</b>	<b>4</b>	<b>2,344</b>	<b>8,475</b>	<b>19,825</b>	<b>3,840</b>	<b>26,588</b>	<b>27,566</b>	<b>22,358</b>	<b>14,457</b>	<b>125,457</b>	<b>6,024</b>	<b>20,400</b>	<b>2,000</b>	<b>140,483</b>	

**Throughput Australian & NZ avocados by destination state**  
 Throughput 1st January 2014 to date = 1,581,375 5.5kg tray eqv



Forecast Data (Week 10 - 14)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
<b>Week 10 - begin 01/03/2014</b>					
Hass	82,448	70			<b>82,575</b>
Shepard	78,331	5,570		4000	<b>89,185</b>
<b>Week Total</b>	<b>160,779</b>	<b>5,640</b>		<b>4,000</b>	<b>171,761</b>
<b>Week 11 - begin 08/03/2014</b>					
Hass	23,570	100			<b>23,752</b>
Shepard	104,331	6,680	20,000	4,000	<b>120,839</b>
<b>Week Total</b>	<b>127,901</b>	<b>6,780</b>	<b>20,000</b>	<b>4,000</b>	<b>144,591</b>
<b>Week 12 - begin 15/03/2014</b>					
Hass	3,000	500			<b>3,909</b>
Shepard	146,404	5,580	20,000	4,000	<b>160,912</b>
<b>Week Total</b>	<b>149,404</b>	<b>6,080</b>	<b>20,000</b>	<b>4,000</b>	<b>164,822</b>
<b>Week 13 - begin 22/03/2014</b>					
Hass	7,000	1,000			<b>8,818</b>
Shepard	140,604	5,830	18,000	4,000	<b>155,204</b>
<b>Week Total</b>	<b>147,604</b>	<b>6,830</b>	<b>18,000</b>	<b>4,000</b>	<b>164,022</b>
<b>Week 14 - begin 29/03/2014</b>					
Hass	7,000	1,000			<b>8,818</b>
Shepard	133,604	5,180	15,000	1,500	<b>146,022</b>
<b>Week Total</b>	<b>140,604</b>	<b>6,180</b>	<b>15,000</b>	<b>1,500</b>	<b>154,840</b>

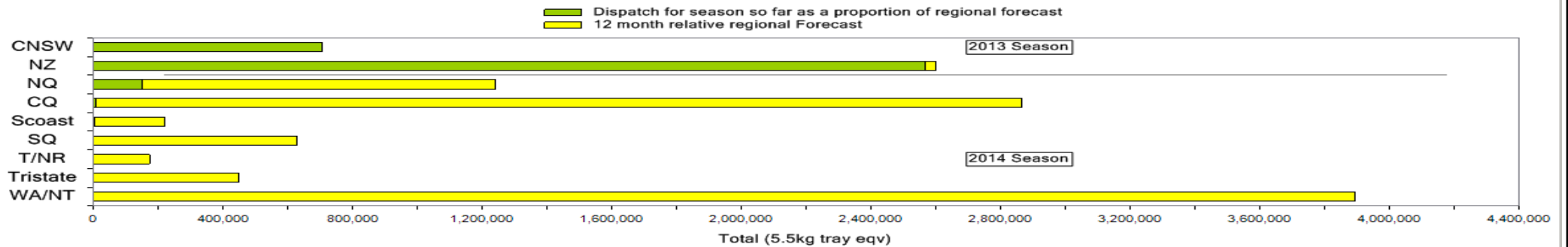
Green shading indicates dispatch data		Yellow shading indicates forecast data			
Dispatch Data (Week 10 - begin 1/03/2014)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Hass	55,157				<b>55,157</b>
Shepard	70,300	6,024	20,400	2,000	<b>85,326</b>
<b>Total</b>	<b>125,457</b>	<b>6,024</b>	<b>20,400</b>	<b>2,000</b>	<b>140,483</b>



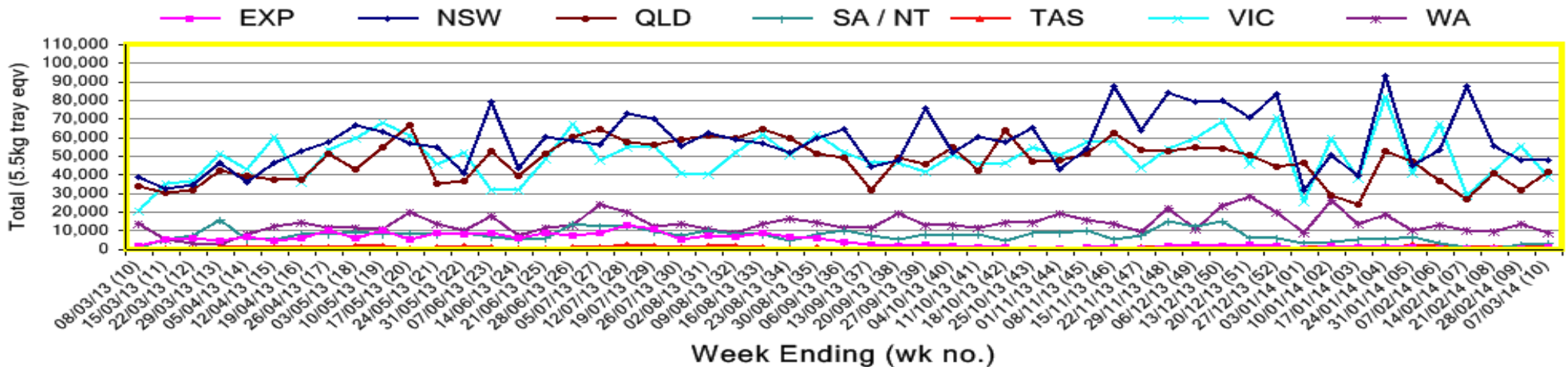
New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2013-April 2014										
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	0	145,700	338,000	424,000	564,865	642,687	435,405	38,984	0	<b>2,588,932</b>
<b>Australia (from Infocado)</b>	16,341	83,173	283,934	582,190	587,056	596,527	450,236	55,157		<b>2,654,614</b>
<b>USA<sup>1</sup></b>	0	0	0	0	0	0				<b>0</b>
<b>Japan<sup>1</sup></b>	0	8,272	38,102	48,498	26,806	2,634				<b>124,312</b>
<b>Other Asia<sup>1</sup></b>	0	12,075	33,107	44,293	47,072	23,811				<b>160,358</b>
<b>Total</b>	<b>16,341</b>	<b>103,520</b>	<b>355,143</b>	<b>674,981</b>	<b>660,934</b>	<b>622,972</b>	<b>450,236</b>	<b>55,157</b>		<b>2,939,284</b>

1 source: Statistics NZ adjusted for freight time to destination port

Percentage dispatched by region (Based on seasonal forecast - 2014)



Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2014 to date = 1,581,375 5.5kg tray eqv



**Week 10 contributors - Packhouses**

Natures Fruit Company (Consolidator)	Avocado Industry Council (NZAGA)
One Harvest (Consolidator)	R & M Waterman (NQ)
Sunfresh (Consolidator)	Lakeshore Pty Ltd (NQ)
The Avolution (Consolidator)	Hilltop Mareeba (NQ)
Simpson Farms Pty Ltd (CQ)	Avocado Estates (NQ)
Donovan Family Investment Trust (CQ)	Battistin Orchards Pty Ltd (NQ)
Avocado Ridge (CQ)	Gunnado Farm (NQ)
SuperPak (CQ)	Tinaroo Falls Avocado Trust (NQ)
Sunnyspot Packhouse (CQ)	CNSW: Less than 3 contributors

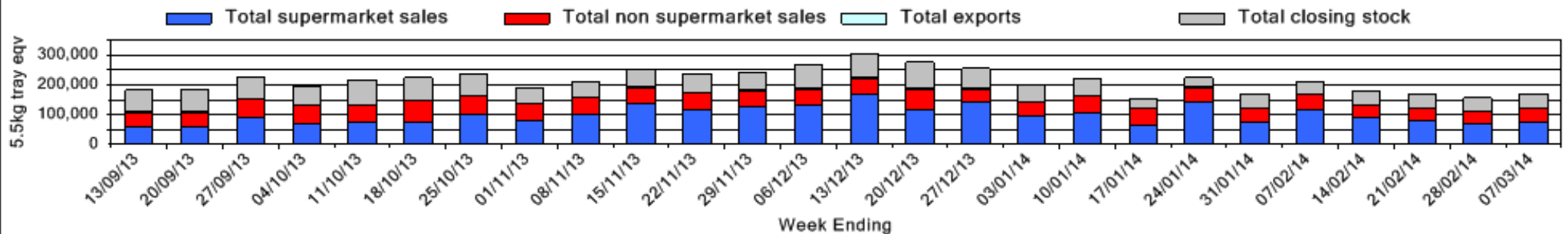
**Week 10 contributors - Wholesalers**

Allcrops Pty Ltd (Sydney)	Murray Bros (Brisbane)
C & S Ponte Produce Pty Ltd (Melbourne)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Adelaide)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Brisbane)	The La Manna Group (Adelaide)
Etherington (Perth)	The La Manna Group (Brisbane)
Exotic Fruit Traders (Sydney)	The La Manna Group (Melbourne)
Fresh Choice WA Pty Ltd (Perth)	United Fresh (Adelaide)
Fresh Express Produce Pty Ltd (Perth)	

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

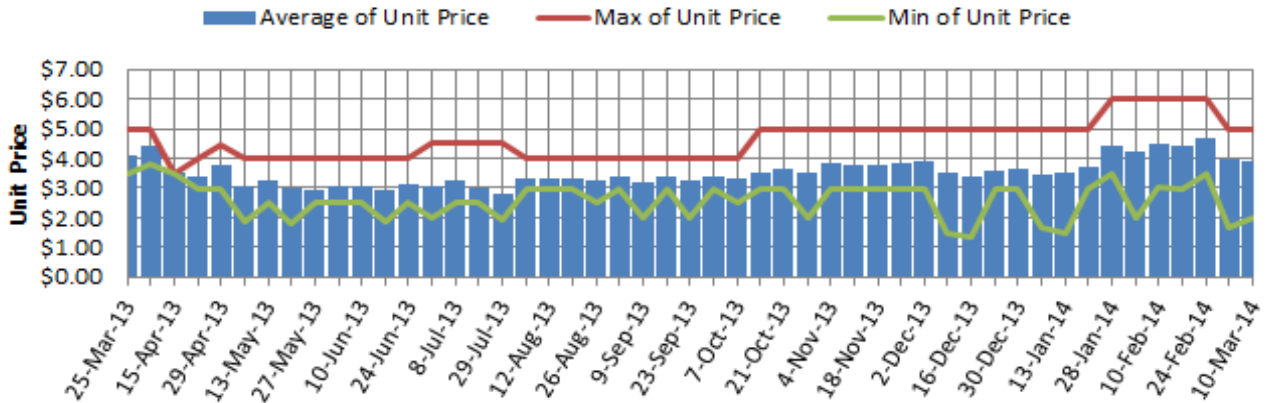
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total supermarket sales</b>																		
<b>Total non supermarket sales</b>	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total exports</b>	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total sales</b>	19,427	6,660		26,087		477		477	867		6,600		6,600	1,200	19,427	8,727		28,154
<b>Total Stock on Hand</b>																		
QLD																		
<b>Total supermarket sales</b>	8,790	17,466		26,256		793		793	1,442		6,000		6,000	1,091	8,790	19,999		28,789
<b>Total non supermarket sales</b>	14,185	2,642		16,827		728		728	1,324						14,185	3,966		18,151
<b>Total exports</b>		640		640												640		640
<b>Total sales</b>	22,975	20,748		43,723		1,521		1,521	2,765		6,000		6,000	1,091	22,975	24,604		47,579
<b>Total Stock on Hand</b>	19,166	1,324		20,490		214		214	389						19,166	1,713		20,879
SA & TAS																		
<b>Total supermarket sales</b>		3,292	400	3,692							1,200		1,200	218		3,510	400	3,910
<b>Total non supermarket sales</b>	4,504	232	1,401	6,137	473	21	16	510	927						5,364	270	1,430	7,064
<b>Total exports</b>																		
<b>Total sales</b>	4,504	3,524	1,801	9,829	473	21	16	510	927		1,200		1,200	218	5,364	3,780	1,830	10,974
<b>Total Stock on Hand</b>	3,060	1,826	3,612	8,498	225	192	75	492	895						3,469	2,175	3,748	9,393
VIC																		
<b>Total supermarket sales</b>	1,160	12,172		13,332		96		96	175		6,600		6,600	1,200	1,160	13,547		14,707
<b>Total non supermarket sales</b>	3,732	4,813	109	8,654	490	608		1,098	1,996						4,623	5,918	109	10,650
<b>Total exports</b>																		
<b>Total sales</b>	4,892	16,985	109	21,986	490	704		1,194	2,171		6,600		6,600	1,200	5,783	19,465	109	25,357
<b>Total Stock on Hand</b>	4,777	3,310		8,087	890	318		1,208	2,196						6,395	3,888		10,283
WA																		
<b>Total supermarket sales</b>	5,349			5,349	6			6	11						5,360			5,360
<b>Total non supermarket sales</b>	3,247			3,247	276			276	502						3,749			3,749
<b>Total exports</b>																		
<b>Total sales</b>	8,596			8,596	282			282	513						9,109			9,109
<b>Total Stock on Hand</b>	3,251			3,251	174			174	316						3,567			3,567
Total																		
<b>Total supermarket sales</b>	34,726	35,698	400	70,824	6	889		895	1,627		20,400		20,400	3,709	34,737	41,023	400	76,160
<b>Total non supermarket sales</b>	25,668	11,579	1,510	38,757	1,239	1,834	16	3,089	5,616						27,921	14,914	1,539	44,373
<b>Total exports</b>		640		640												640		640
<b>Total sales</b>	60,394	47,917	1,910	110,221	1,245	2,723	16	3,984	7,244		20,400		20,400	3,709	62,658	56,577	1,939	121,174
<b>Total Stock on Hand</b>	30,254	9,544	3,612	43,410	1,289	965	75	2,329	4,235						32,598	11,299	3,748	47,645

**Weekly National Sales**

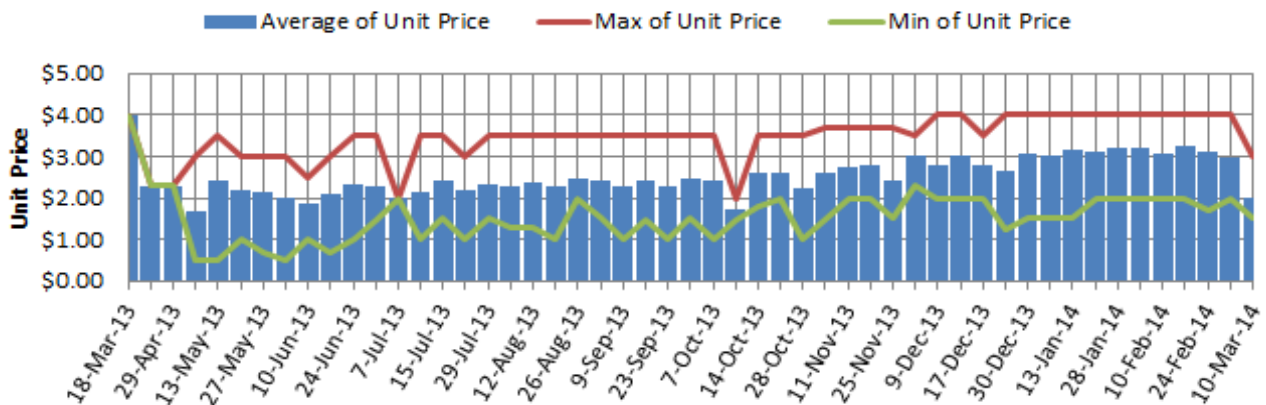




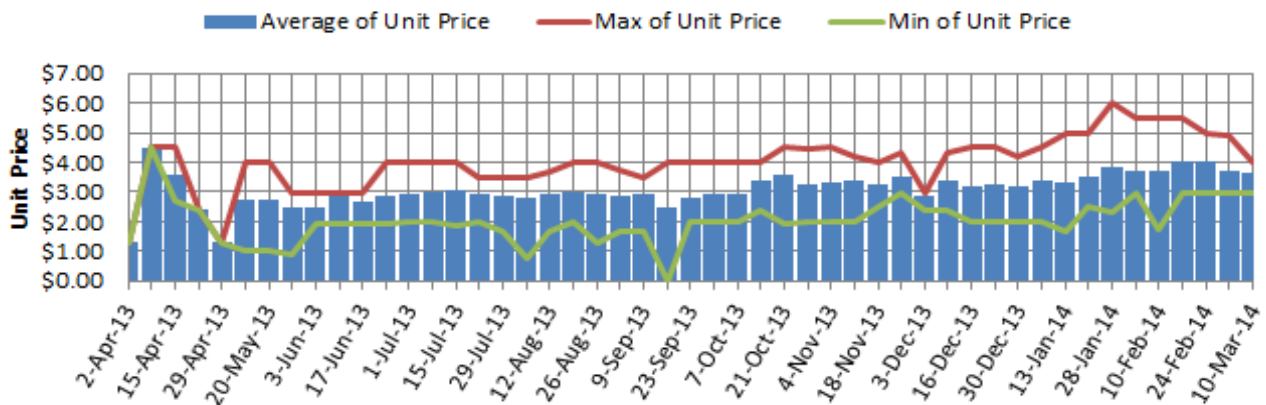
### Hass Avocado Average Retail Prices - Sydney



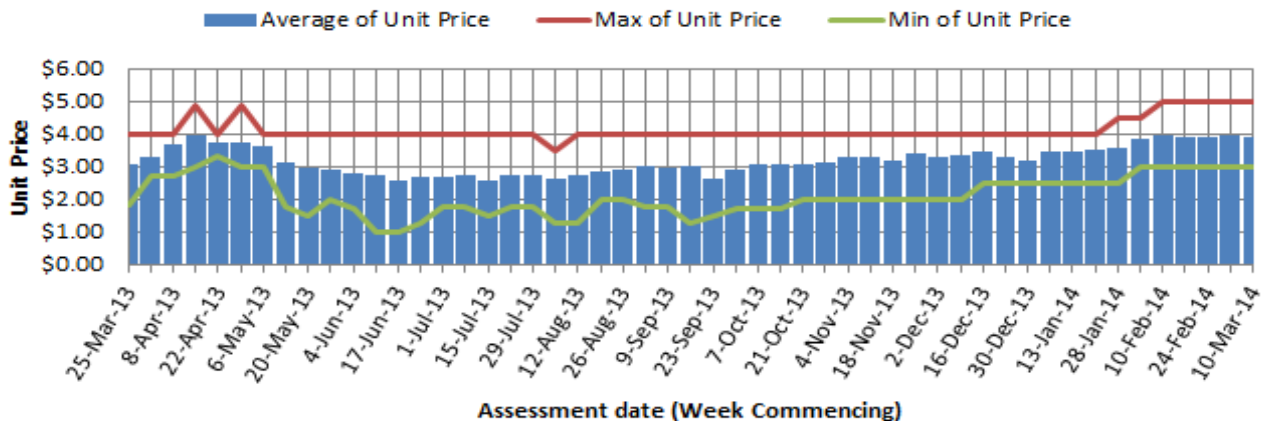
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

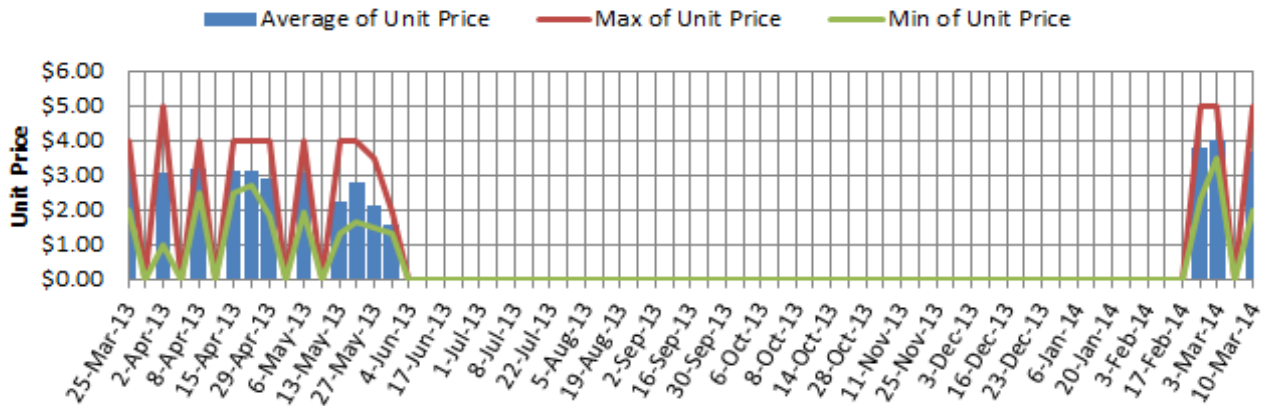


### Hass Avocado Average Retail Prices - Perth

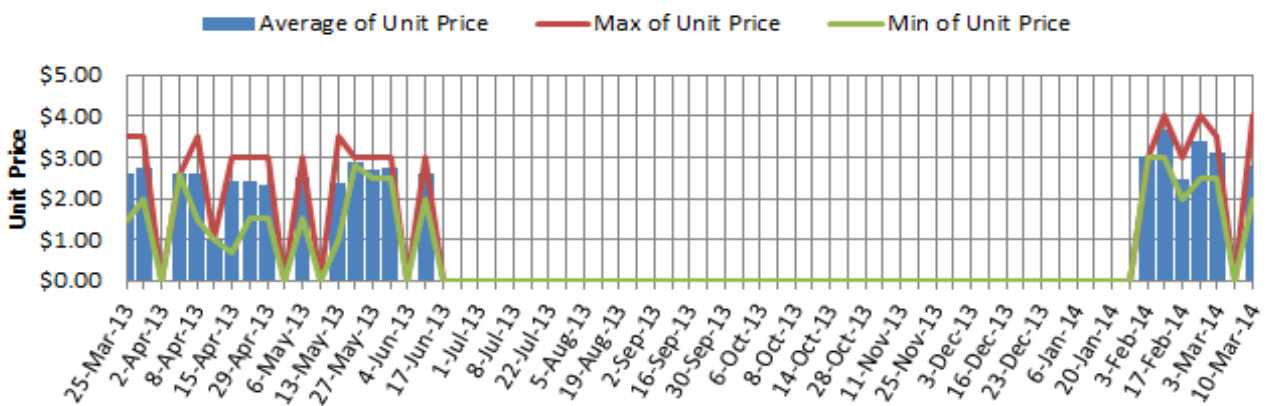


Assessment date (Week Commencing)

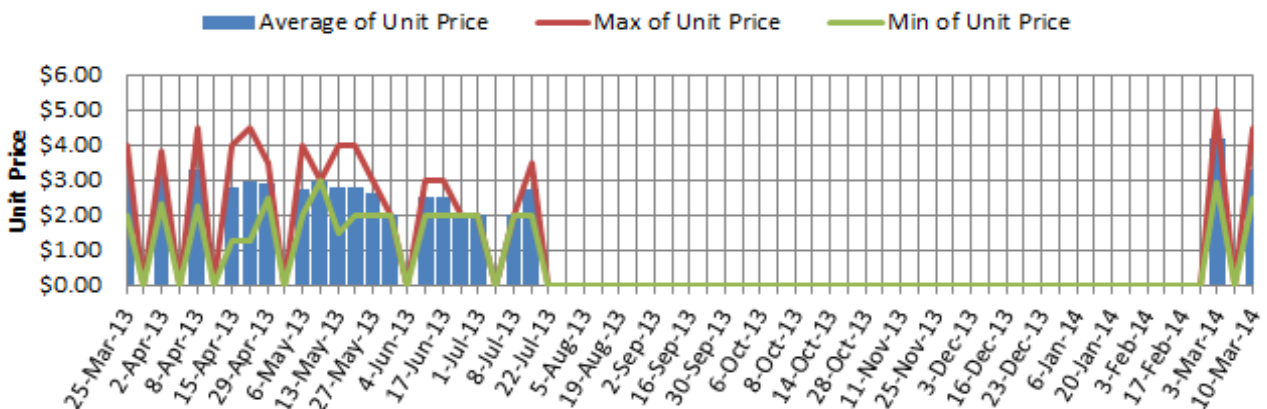
## Shepard Avocado Average Retail Prices - Sydney



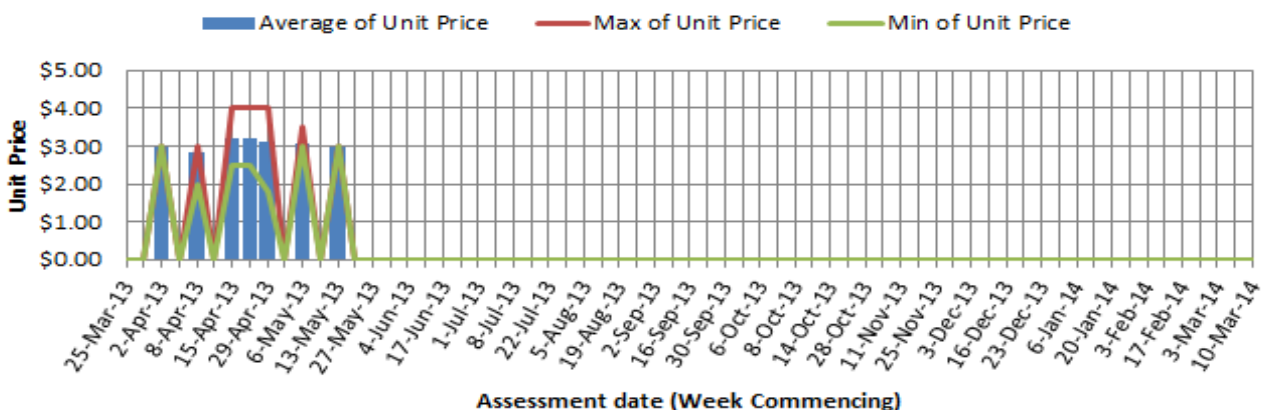
## Shepard Avocado Average Retail Prices - Brisbane



## Shepard Avocado Average Retail Prices - Melbourne



## Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 10th March 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>						<b>MELBOURNE</b>					
Foodworks	Shepard	140	1.99	No	Aus	Safeway	Shepard	230	2.48	No	Aus
IGA	Shepard	190	1.99	Store	Aus	Safeway	Shepard	280	2.48	Store	Aus
I	Hass	200	2.00	Store	NZ	Safeway	Shepard	270	2.48	Store	Aus
I	Hass	230	2.49	Store	NZ	I	Shepard	190	2.99	No	NZ
I	Hass	240	2.99	No	NZ	I	Shepard	270	2.99	No	Aus
Coles	Shepard	280	3.48	No	Aus	I	Hass	195	2.99	No	NZ
Coles	Shepard	260	3.48	No	Aus	Coles	Shepard	270	3.48	No	Aus
Coles	Shepard	300	3.48	No	Aus	Coles	Shepard	420	3.48	No	Aus
I	Shepard	210	3.49	No	Aus	Coles	Shepard	205	3.48	No	Aus
Woolworths	Shepard	300	3.98	No	Aus	IGA	Hass	260	3.99	No	NZ
Woolworths	Shepard	290	3.98	No	Aus	IS	Hass	500	3.99	No	NZ
Woolworths	Shepard	260	3.98	No	Aus	I	Shepard	290	3.99	No	Aus
I	Shepard	270	3.99	No	Aus	I	Shepard	280	3.99	No	Aus
IGA	Shepard	225	3.99	No	Aus	I	Shepard	250	4.49	No	NZ
I	Shepard	270	3.99	No	Aus	<b>PERTH</b>					
I	Shepard	340	3.99	No	Aus	IS	Hass	180	2.99	Store	NZ
I	Shepard	330	3.99	No	Aus	I	Hass	230	3.49	No	Aus
Foodworks	Hass	280	4.79	No	Aus	IGA	Hass	290	3.69	No	NZ
IGA	Hass	260	4.95	No	Mixed	Coles	Hass	225	3.88	No	NZ
I	Hass	270	4.99	No	Aus	Coles	Hass	270	3.88	No	NZ
I	Shepard	320	4.99	No	Aus	Coles	Hass	290	3.88	No	NZ
I	Hass	280	4.99	No	Aus	Woolworths	Hass	265	3.98	Store	NZ
I	Reed	480	6.99	No	Aus	I	Hass	255	3.98	No	Mixed
I	Reed	510	6.99	No	Aus	Woolworths	Hass	220	3.98	No	Mixed
<b>BRISBANE</b>						I	Hass	270	3.99	No	Aus
I	Hass	658	1.50	No	NZ	I	Hass	265	3.99	No	Mixed
I	Hass	166	1.50	No	NZ	I	Hass	230	3.99	No	Aus
I	Hass	166	1.99	No	NZ	IGA	Hass	230	3.99	No	NZ
I	Shepard	225	1.99	No	Aus	IGA	Hass	295	4.99	No	NZ
Coles	Shepard	200	2.00	Cat	Aus						
Coles	Shepard	260	2.00	Cat	Aus						
Coles	Shepard	185	2.00	Cat	Aus						
Woolworths	Shepard	205	2.25	Cat	Aus						
Woolworths	Shepard	190	2.25	Cat	Aus						
Woolworths	Shepard	180	2.48	No	Aus						
Woolworths	Shepard	205	2.98	No	Aus						
Coles	Shepard	260	2.98	No	Aus						
Woolworths	Shepard	180	2.98	No	Aus						
Coles	Shepard	185	2.98	No	Aus						
Coles	Shepard	200	2.98	No	Aus						
IGA	Shepard	180	2.98	No	Aus						
IGA	Shepard	170	2.99	Cat	Aus						
I	Hass	200	2.99	No	NZ						
I	Shepard	225	3.00	Store	Aus						
I	Shepard	276	3.50	Store	Aus						
I	Shepard	225	3.50	No	Aus						
I	Shepard	276	3.99	No	Aus						

Size ranges based on 5.5kg trays	
Size	Weight Range
28	185 - 208g
25	208 - 230g
23	230 - 245g
22	245 - 263g
20	263 - 290g
18	290 - 325g
16	325 - 363g

### Special Codes

Cat = fruit is on catalogue special for that city this week  
 Store = fruit is on special in that store only this week

### Store Codes

I = Independent Fruit and Vegetable stores  
 IC = Independent Fruit and Vegetable store Chains  
 IS = Independent Supermarkets

### Country of Origin Codes

Aus = display sign indicates fruit is from Australia  
 NZ = display sign indicates fruit is from New Zealand  
 NS = display sign doesn't say where fruit is from