



INFOCADO WEEKLY REPORT: 27th February—4th March 2016 (Week 10)

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Comments

- The weekly dispatch volume (174,413 trays) was considerably higher than the week's forecast of 108,703 trays (refer P 2).
- The four weekly forecast shows stronger volumes of Shepard fruit from North Queensland and declining volumes of Hass as WA and NZ fruit leave the market.
- **We encourage NQ packers and consolidators to ensure their forecast data is up-to-date :)**
- NQ packers are reminded to carefully monitor fruit maturity particularly in the early part of the harvest, to ensure consumer satisfaction which drives future purchases (refer P 2).
- The largest volume of dispatches in week 10 originated from Western Australia (128,226 tray eqv.). The New South Wales market received the highest volume (53,309 tray eqv.), size 20 was the dominant size (47,260 tray eqv.) (refer P 3).
- Due to changes in reporting, ABS data on imports from NZ will not be available until at least 5 weeks after the close of the month.
- Insufficient data was received from the NSW wholesalers this week to provide a full wholesale report (refer P 5).
- Weekly Retail Prices have now been included in the report (refer P6&7). Prices are provided for week 10 (Wed, 2nd Mar —Tues, 8th Mar). These prices are sourced from online retailer shopping sites and online catalogues.

Marketing Update: Perfect Match results to date

The Perfect Match content series was launched on 17 February – with some great results being achieved to date. The first post on the Australian Avocados Facebook page was the 'chocolate and avocado' date which had 162,000 views – a great result. The trout and avocado post had 167,000 views.

To support the short films, there were other posts (still images) with quirky one-liners such as 'you're a real catch', 'you're so sweet' and 'you make me all gooey inside'.

These posts also did really well with 1,100 likes, 559 and 852 likes respectively. The content was also shared and has hundreds of people commenting on the posts. There are two more short films to come out over the coming weeks (Haloumi and Chicken) with the campaign wrapping up at the end of the month. Check out the page – www.facebook.com/AustralianAvocados.

Upcoming Holidays

Canberra Day (ACT) & Labour Day (VIC): 14th March | Good Friday: 25th March | Easter Monday: 28th March | Anzac Day: 25th April |

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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.

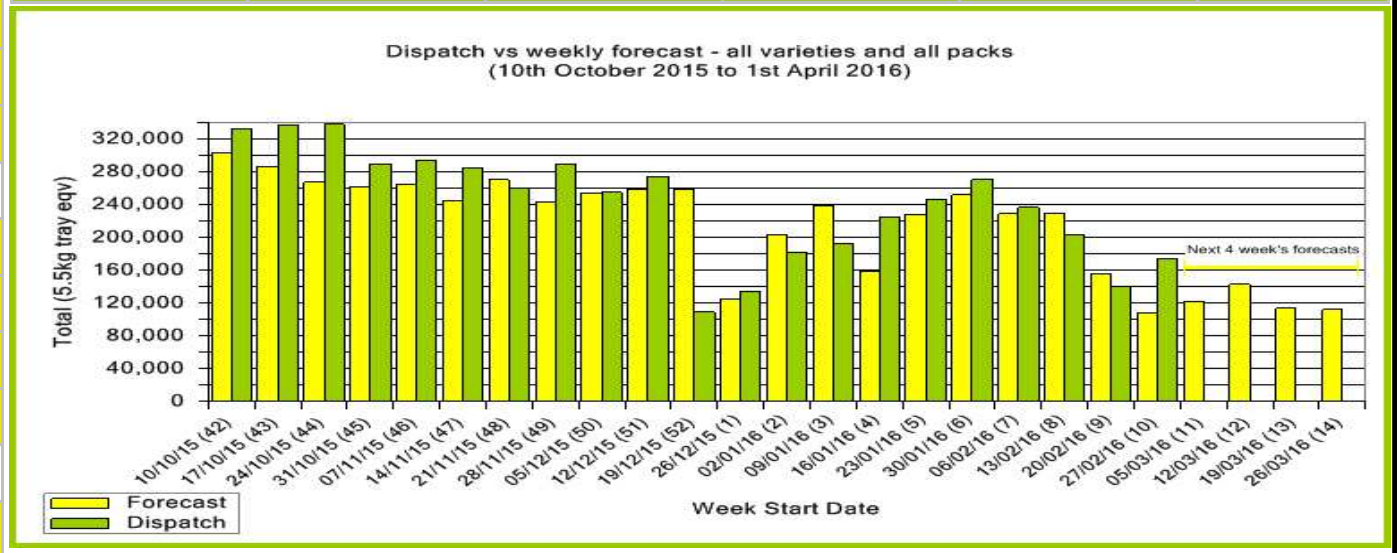
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This project has been funded by Horticulture Innovation Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

Yellow shading indicates forecast data Green shading indicates dispatch data

Forecast Data (Week 10 - 14)				
Variety	Trays - Total	Bulk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	5.5Kg Eqv
Week 10 - begin 27/02/2016				
Hass	64,464	3,389		70,626
Lamb Hass	1,272	8		1,287
Shepard	31,700	2,700	1,000	36,791
Week Total	97,436	6,097	1,000	108,703
Week 11 - begin 05/03/2016				
Hass	46,711	2,325		50,938
Lamb Hass	800	10		818
Shepard	60,000	5,500	5,300	70,964
Week Total	107,511	7,835	5,300	122,720
Week 12 - begin 12/03/2016				
Hass	27,800	848		29,342
Shepard	97,500	8,380	6,050	113,836
Week Total	125,300	9,228	6,050	143,178
Week 13 - begin 19/03/2016				
Hass	200	48		287
Shepard	96,500	8,900	5,300	113,646
Week Total	96,700	8,948	5,300	113,933
Week 14 - begin 26/03/2016				
Shepard	98,500	7,000	5,000	112,136
Week Total	98,500	7,000	5,000	112,136

Dispatch Data (Week 10 - begin 27/02/2016)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Hass	118,808	3,814	528	7,814	127,260
Lamb Hass	504	17			535
Reed				6,700	1,218
Shepard	35,172	5,126		5,000	45,401
Total	154,484	8,957	528	19,514	174,413



New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) July 2015 - March 2016										
Export Destination	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total to Date
NZ-Aus - Pre Season Forecast¹	17,160	109,680	384,240	330,990	378,100	496,690	463,096	232,050	3,520	2,415,526
NZ-Aus - Disp + Mthly Forecast²	16,725	80,567	191,340	420,417	324,356	388,566	420,639	263,434	0	2,097,044
Australia (from ABS)	27,589	107,037	232,868	444,023	373,317	526,550	426,445	**		2,137,829
USA³	0	0	0	0	0	0	0	0		0
Japan³	0	0	4,212	20,473	26,484	9,286	1,089	8*		61,551
Other Asia³	973	6,951	28,265	61,567	63,798	52,651	38,817	16,747*		269,768
Total Dispatch (Infocado 2 + 3)	17,698	87,518	223,817	502,457	414,637	450,503	460,545	271,188	0	2,428,364

1 Source: Infocado AAL, Seasonal Forecast provided at start of season
 2 Source: Infocado AAL, Mthly Dispatch + Updated Mthly Seasonal Forecast (dispatch is updated at the end of each month or calculated from the Total Dispatch row at bottom of table)
 3 Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port
 * - waiting on final volumes from Infoshare NZ.
 ** - ABS import data is now not provided until at least 5 weeks after the close of the month.

Industry Dispatches By Origin Region and Count Size : 27th February - 4th March 2016 (Wk 10)

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											183			333
North Qld	24	649	2,583	6,525	456	10,421	5,451	7,141	1,634	34,884	4,759		5,000	44,446
Sunshine Coast									288	288	184			623
Tri State							148	291		439	191			786
WA/NT	6,267	16,833	23,432	40,735	3,297	15,452	7,316	4,870	671	118,873	3,640	528	14,514	128,226
	6,291	17,482	26,015	47,260	3,753	25,873	12,915	12,302	2,593	154,484	8,957	528	19,514	174,413

Origin of Avocado



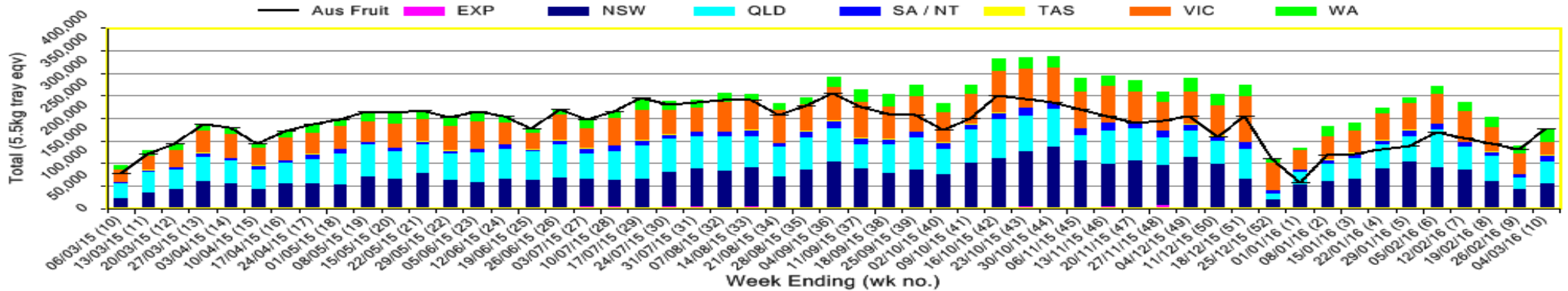
Destination of Avocado



Industry Dispatches By Destination State and Count Size : 27th February - 4th March 2016 (Wk 10)

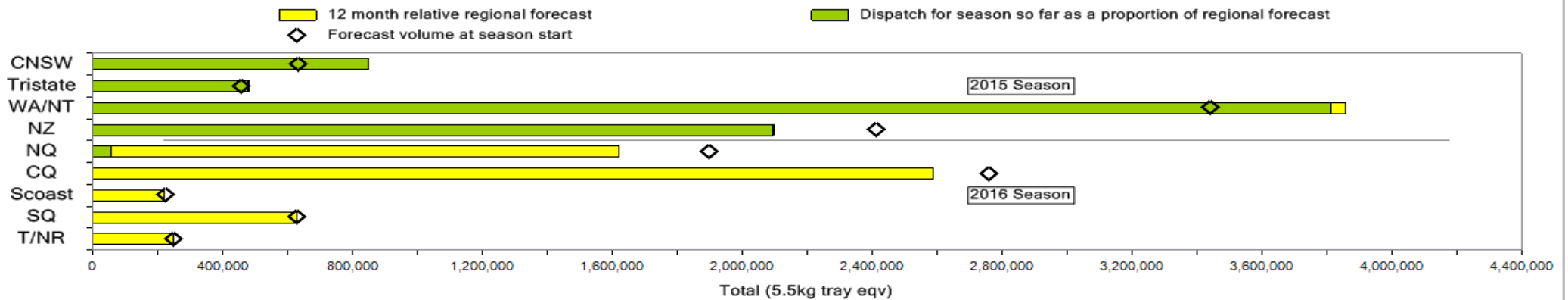
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
EXP	50		23						671	744	520			1,689
NSW	2,187	4,381	9,141	20,662	138	5,293	1,769	4,307	144	48,022	2,908			53,309
QLD	2,331	6,141	8,692	7,061	147	8,327	3,010	5,632	1,730	43,071	3,506		5,000	50,355
SA / NT	781	1,609	1,320	2,088		3,653	2,729	272		12,452	35	192		12,551
TAS							608	320		928				928
VIC	160	3,536	4,504	10,825	171	4,175	2,967	616	48	27,002	961	192		28,784
WA	782	1,815	2,335	6,624	3,297	4,425	1,832	1,155		22,265	1,027	144	14,514	26,797
Total	6,291	17,482	26,015	47,260	3,753	25,873	12,915	12,302	2,593	154,484	8,957	528	19,514	174,413

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2016 to date = 2,005,424 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 10 Contributors - Packhouses

- | | |
|--|---|
| Green Skin Avocados (Consolidator) | Avocados with Altitude (NQ) |
| Mackays Banana Marketing Co (Consolidator) | Avocado Estates (NQ) |
| Simpson Farms Pty Ltd (Consolidator) | Tinaroo Falls Avocado Trust (NQ) |
| Sunfresh (SC) | Battistin Orchards Pty Ltd (NQ) |
| The Avolution (Consolidator) | Hilltop Mareeba (NQ) |
| SuperPak/Avocado Ridge (CQ) | Sunfresh (Consolidator) |
| Donovan Family Investment Trust (CQ) | Willow Creek (WA) |
| Sunny Bluff Produce Pty Ltd (CQ) | VP & EA Farrell (WA) |
| Sunnyspot Packhouse Pty Ltd (CQ) | Delroy Orchards (WA) |
| Avocado Industry Council (NZAGA) | Advance Packing & Marketing Services P/L (WA) |
| Cobra Hill Orchards (NQ) | CNSW: Less than 3 contributors |
| Aussie Orchards Growers & Packers Mutchilba (NQ) | TRI: Less than 3 contributors |
| Gunnado Farm (NQ) | |

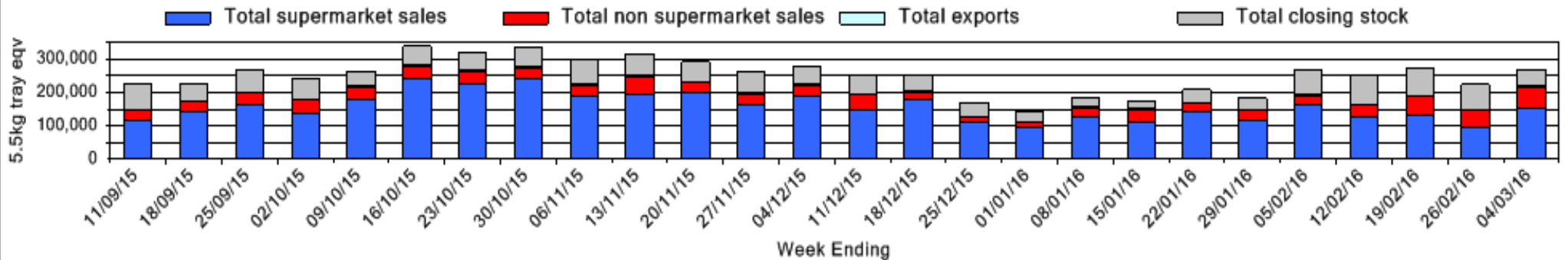
Week 10 Contributors - Wholesalers

- | | |
|---|---------------------------------|
| Allcrops Pty Ltd (Sydney) | Fresh Choice WA Pty Ltd (Perth) |
| C & S Ponte Produce Pty Ltd (Melbourne) | Murray Bros (Brisbane) |
| Costa Farms (Adelaide) | The La Manna Group (Adelaide) |
| Costa Farms (Brisbane) | The La Manna Group (Brisbane) |
| Costa Farms (Melbourne) | The La Manna Group (Melbourne) |
| De Luca Banana Marketing Pty Ltd (Brisbane) | United Fresh (Adelaide) |
| Etherington (Perth) | VB Sculli (Melbourne) |
| Exotic Fruit Traders (Sydney) | WA Farm Direct (Perth) |
| Favco Queensland Pty Ltd (Brisbane) | |

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																		
Total non supermarket sales																		
Total exports																		
Total sales	47,266			47,266	288			288	524						47,790			47,790
Total Stock on Hand																		
QLD																		
Total supermarket sales	48,799	19,175		67,974	173	640		813	1,478						49,114	20,339		69,452
Total non supermarket sales	4,631	3,136	1,040	8,807	11	1,358	288	1,657	3,013						4,651	5,605	1,564	11,820
Total exports																		
Total sales	53,430	22,311	1,040	76,781	184	1,998	288	2,470	4,491						53,765	25,944	1,564	81,272
Total Stock on Hand	15,222	1,259	1,124	17,605		294		294	535						15,222	1,794	1,124	18,140
SA & TAS																		
Total supermarket sales	14,631			14,631											14,631			14,631
Total non supermarket sales	5,797	27	1,528	7,352	762	19	2	783	1,424						7,182	62	1,532	8,776
Total exports																		
Total sales	20,428	27	1,528	21,983	762	19	2	783	1,424						21,813	62	1,532	23,407
Total Stock on Hand	7,365	2,716	1,275	11,356	585	203		788	1,433						8,429	3,085	1,275	12,789
VIC																		
Total supermarket sales	19,523	4,800		24,323	110			110	200						19,723	4,800		24,523
Total non supermarket sales	16,863	1,192	969	19,024	636	420	172	1,228	2,233						18,019	1,956	1,282	21,257
Total exports																		
Total sales	36,386	5,992	969	43,347	746	420	172	1,338	2,433						37,742	6,756	1,282	45,780
Total Stock on Hand	10,583	65		10,648	9	48	31	88	160						10,599	152	56	10,808
WA																		
Total supermarket sales	12,781			12,781	244			244	444						13,225			13,225
Total non supermarket sales	4,582			4,582	299			299	544						5,126			5,126
Total exports	744			744	520			520	945						1,689			1,689
Total sales	18,107			18,107	1,063			1,063	1,933						20,040			20,040
Total Stock on Hand	3,334			3,334											3,334			3,334
Total																		
Total supermarket sales	126,650	23,975		150,625	719	640		1,359	2,471						127,957	25,139		153,096
Total non supermarket sales	48,223	4,355	3,537	56,115	1,804	1,797	462	4,063	7,387						51,503	7,622	4,377	63,502
Total exports	744			744	520			520	945						1,689			1,689
Total sales	175,617	28,330	3,537	207,484	3,043	2,437	462	5,942	10,804						181,150	32,761	4,377	218,288
Total Stock on Hand	39,994	4,040	2,399	46,433	594	545	31	1,170	2,127						41,074	5,031	2,455	48,560

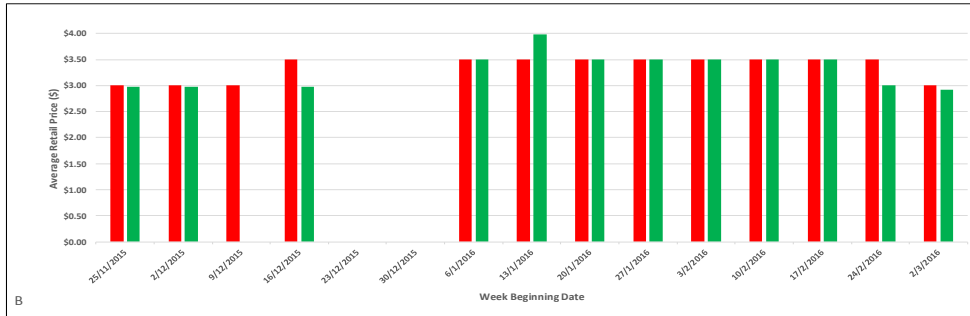
Weekly National Sales



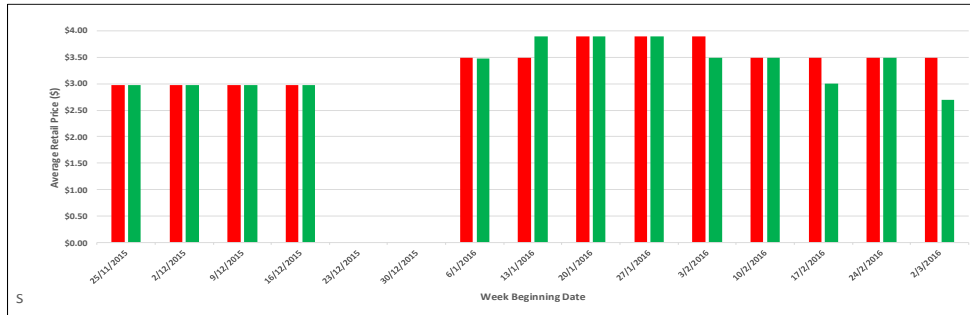
Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 2nd March 2016 (Week 10)

Key: ■ Coles online ■ Woolworths online

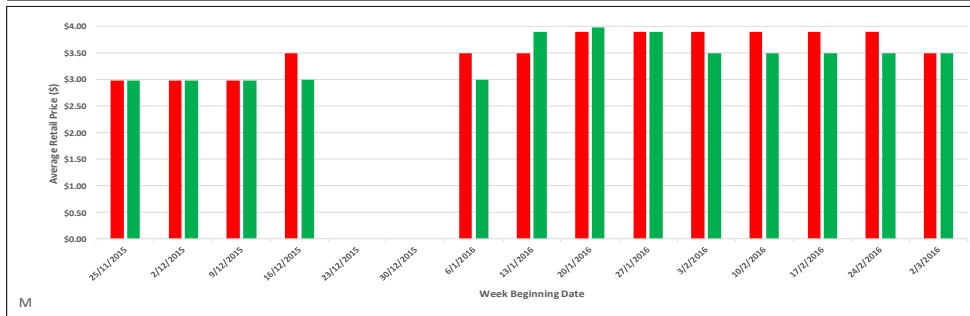
Brisbane



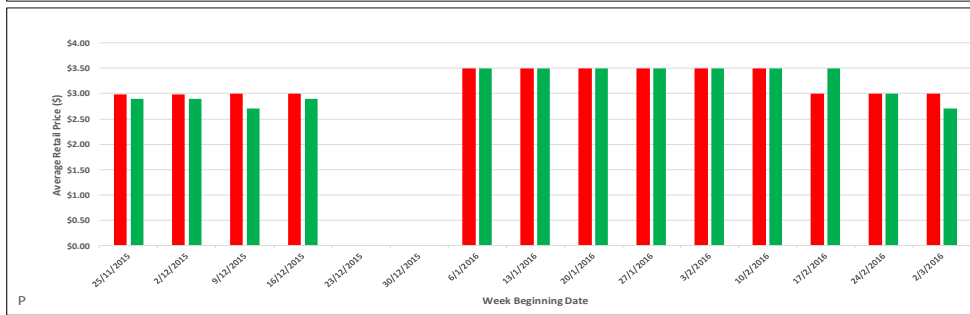
Sydney



Melbourne



Perth



Single Fruit, Multibuy and Pack Pricing for Week Beginning-Wed, 2nd March 2016 (Week 10)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	Single Fruit		↓\$3.00	\$3.50	↓\$3.50	\$3.00
	Hass	Single Fruit	Organic	\$6.00	\$5.50	-	-
	Shepard	Single Fruit		\$3.00	-	-	-
	Hass	Multi-buy	2 for \$x	-	-	-	2 for \$5*
	Hass	3 Pack		\$6.50	-	-	-
Woolworths	Hass	Single Fruit		↓\$2.92	↓\$2.70*	\$3.50	↓\$2.70
	Hass	Single Fruit	Organic	\$5.50	\$5.50	\$5.50	-
	Hass	Multi-buy	2 for \$x	2 for \$4*	-	-	↓\$2 for \$4.50
	Hass	2 Pack	Ripe	-	-	-	-
	Hass	2 Pack	Organic	-	\$9.98	\$9.98	↑\$11.98
	Hass	3 Pack		\$5.98	\$5.98	\$6.98	\$7.00
	Hass	4 Pack	Mini Ripe	-	-	-	-
	Hass	5 Pack	Mini Disney	-	\$5.98	\$4.98	↑\$7.00
	Hass	1kg Bag	Odd Bunch	-	\$9.90	\$8.98	-

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

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

(Yellow) = same price as previous week

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

Catalogue Offers - Others

Aldi - No catalogue offers found

IGA- No catalogue offers found

Foodworks - Perth - Hass - Multi-buy - 2 for \$5