



INFOCADO WEEKLY REPORT: 10th — 16th March 2012 (Wk 11)



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- Volumes into the market place increased slightly last week with 108,096 5.5kg eqv trays vs 93,434 the week before. The forecast for the next 4 weeks shows this volume increasing as CQ Shepard growers begin picking. NQ growers are also harvesting Hass in coming weeks. As volumes increase in the market it will be critical to work closely with wholesalers and retailers to ensure fruit is moving through the system.
- This week's retail prices show that Shepard is dominant in most markets. Some Brisbane stores have specials running this week for avocados.
- The March seasonal forecast forms have been sent to all packhouses for review. Please take the time to review and resubmit your forecast. This information will be collated and used in the April Quarterly Report. Forms are due back by the end of this month.
- NZ forecasts and dispatches are not included in this report. The most up to date import data has been included on page 3 and has been sourced from Australia Customs records.

What you need to be aware of for next month

- Promotions in March and April will be on Pay TV nationally, on channels Lifestyle YOU and Food Bites Lifestyle Food. In magazines nationally, Australian Good Taste, Australian Womens Weekly, Recipes +, Super Food Ideas, Woman's Day, Donna Hay, Naturally. Online at Allrecipes.com.au and Taste.com.au. As well as direct email newsletters and Foodservice Chef Training in Sydney and Melbourne.
- The Weekly Volumes teleconference will be essential in managing this year's crop. Please contact Maree Tyrrell on 07 3846 6566 or admin@avocado.org.au to participate in this teleconference, held every Tuesday morning.
- Based off the January 2012 Quarterly Report 412,983 5.5kg eqv trays are expected in the market place for April. 496,998 5.5kg eqv trays are expected for Shepard and 31,003 5.5kg eqv trays for other varieties.

Upcoming Holidays

Good Friday: 6 April | Easter Sunday: 8 April | Easter Monday: 9 April | ANZAC Day: 25 April

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IMPORTANT and PLEASE NOTE:

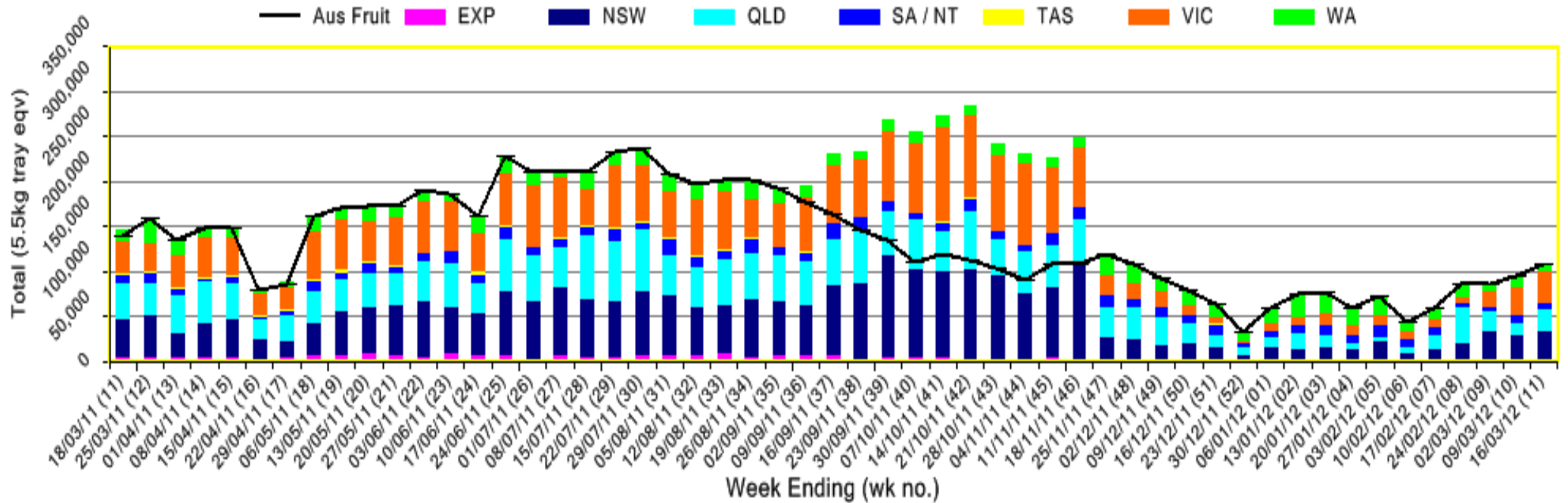
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 10th March - 16th March 2012 (Wk 11)

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								1,204	1,210	2,414				2,414
NSW	28	706	2,684	4,912	1,119	6,011	6,251	1,607	87	23,405	3,680	1,224		30,319
QLD		22	130	1,114	152	3,252	3,035	5,627	16	13,348	5,770	1,980	4,400	24,999
SA / NT			1,017	3,474		693	910	363		6,457	96			6,632
TAS							936			936	192			1,285
VIC	206	605	3,201	8,632	2,164	6,029	5,755	1,386	1,020	28,998	2,903	1,440		34,538
WA	489	365	182	301		982	3,533	362		6,214	918			7,883
Total	723	1,698	7,214	18,433	3,435	16,967	20,420	10,549	2,333	81,772	13,559	4,644	4,400	108,069

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2012 to date = 808,167 5.5kg tray eqv



Forecast Data (Week 11 - 15)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 11 - begin 10/03/2012					
Fuerte	3,000	400			3,727
Hass	7,892	800			9,347
Lamb Hass	50	40			123
Shepard	143,548	7,031	6,500	7,000	158,787
Week Total	154,490	8,271	6,500	7,000	171,983

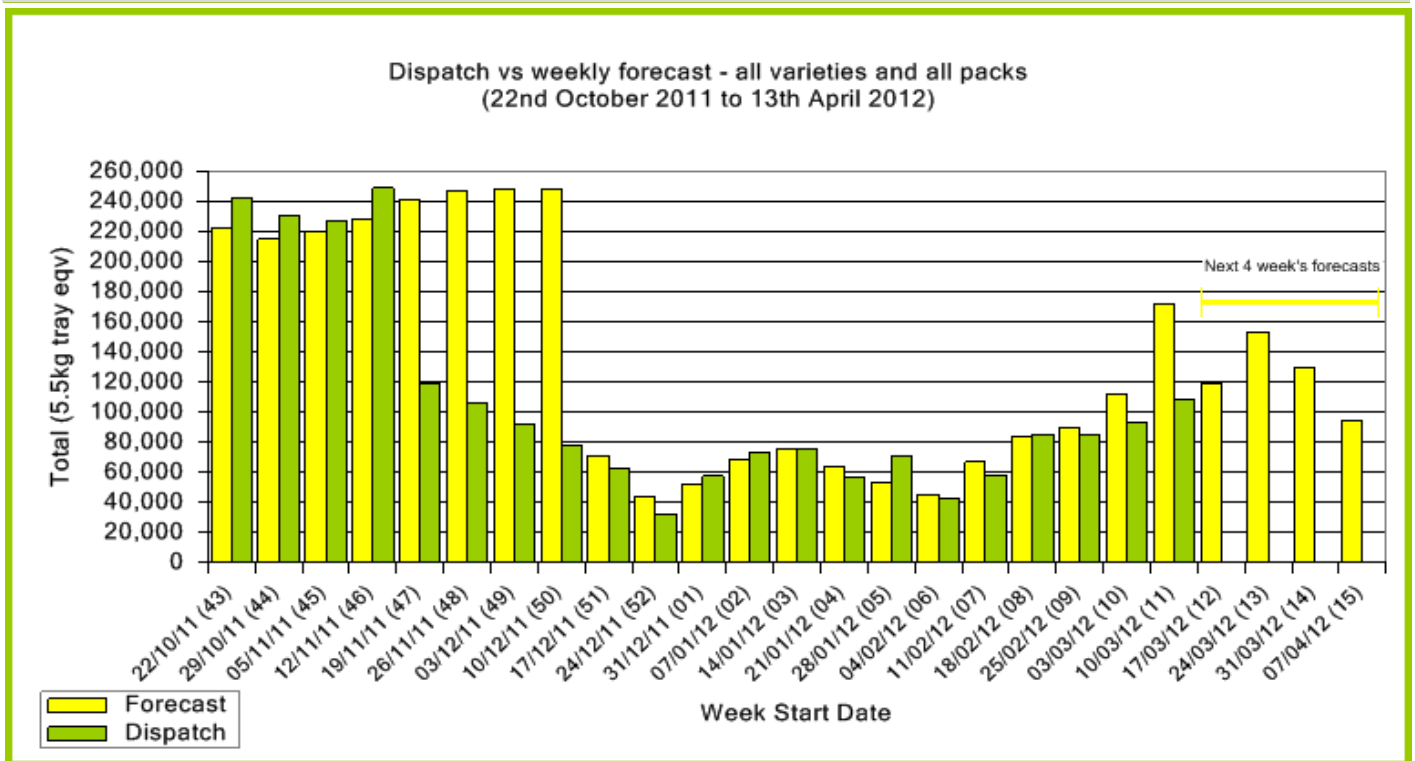
Week 12 - begin 17/03/2012					
Fuerte	1,600	400			2,327
Hass	2,592	340			3,210
Shepard	102,742	5,310	2,500	5,000	113,761
Week Total	106,934	6,050	2,500	5,000	119,298

Week 13 - begin 24/03/2012					
Fuerte	1,550	390			2,259
Hass	16,892	1,260	500	1,000	19,456
Sharwil	500	50			591
Shepard	116,093	7,410	2,500	5,000	130,930
Week Total	135,035	9,110	3,000	6,000	153,235

Week 14 - begin 31/03/2012					
Fuerte	300	80			445
Hass	16,892	1,420	1,000	2,000	20,020
Shepard	95,945	6,760	2,500	4,000	109,418
Week Total	113,137	8,260	3,500	6,000	129,882

Week 15 - begin 07/04/2012					
Fuerte	250	70			377
Hass	12,000	1,220	1,000	2,000	14,764
Shepard	71,297	3,900	2,000	2,000	79,116
Week Total	83,547	5,190	3,000	4,000	94,255

Green shading indicates dispatch data					Yellow shading indicates forecast data	
Dispatch Data (Week 11 - begin 10/03/2012)						
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv	
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays	
Fuerte	2,158	196				2,514
Hass	1,410	553				2,415
Lamb Hass	90	12				112
Reed	1,011	146				1,276
Shepard	77,103	12,652	4,644	4,400		101,751
Total	81,772	13,559	4,644	4,400		108,069



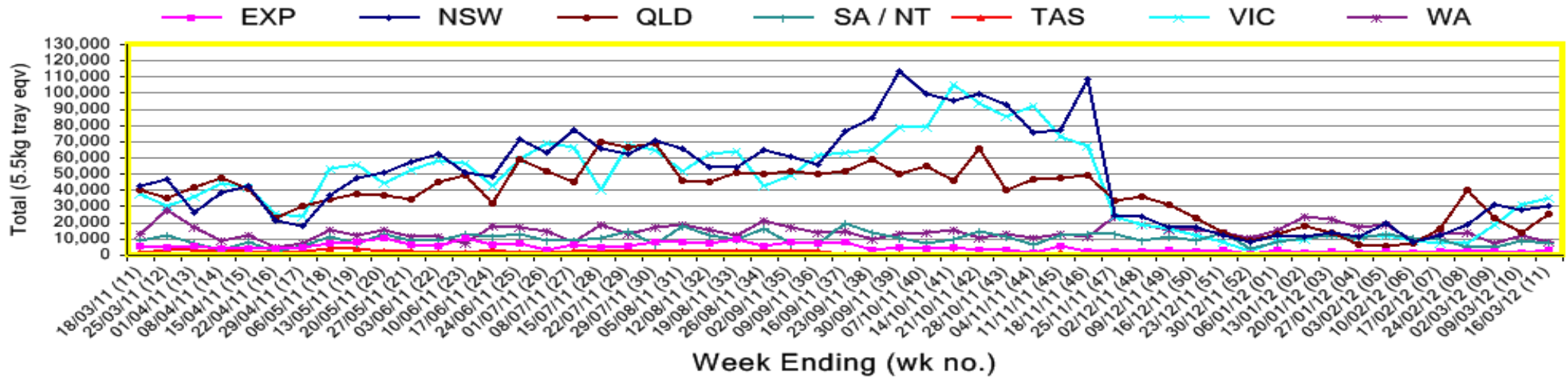
New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) August 2011-April 2012										
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to date
NZ Export to Australia Forecast	33,520	313,264	508,152	667,235	591,141	660,876	305,159	26,101	10,208	3,115,656
Australia		314,209	617,690	655,540	685,179	460,319				2,732,937
USA		11,782	47,380	36,098						95,260
Japan	818	24,196	106,337	123,344						254,695
Total	818	350,187	771,407	814,982	685,179	460,319				3,082,892

Percentage dispatched by region (Based on seasonal forecast - 2012)

■ Dispatch for season so far as a proportion of regional forecast
■ 12 month relative regional Forecast



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2012 to date = 808,167 5.5kg tray eqv



Week 11 contributors - Packhouses

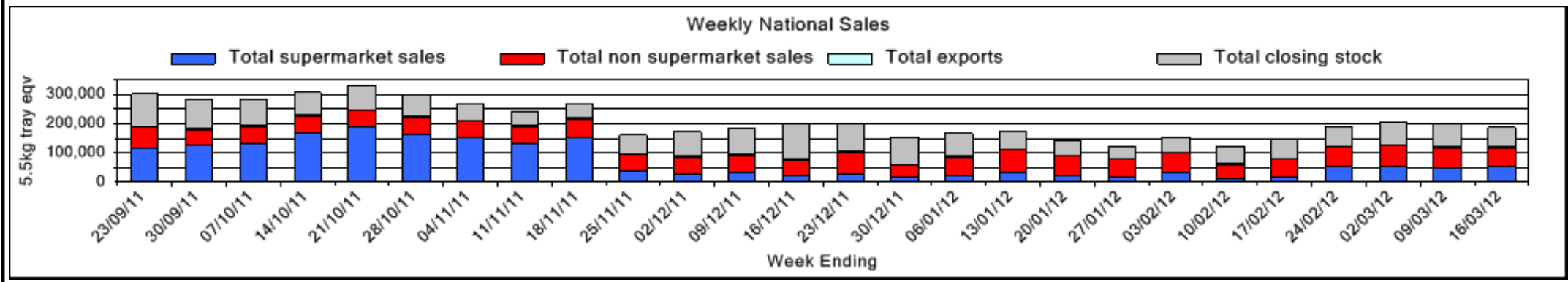
Aussie Orchards Growers & Packers	One Harvest
Bellview Orchards Pty Ltd	R & M Waterman
Donovan Family Investment Trust	Simpson Farms Pty Ltd (Goodwood Home)
Gunnado Farm	Sunfresh
Hilltop Mareeba	Sunnyspot Packhouse Pty Ltd
ID & AM Leighton	SuperPak
Lavers Orchards	Tinaroo Falls Avocado Trust
Natures Fruit Company	

Week 11 contributors - Wholesalers

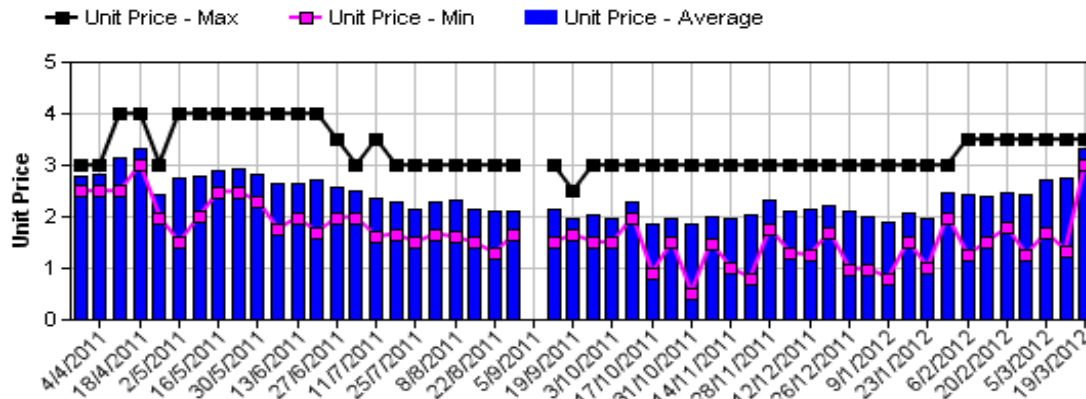
Allcrops Pty Ltd (Sydney)	Freshmax Pty Ltd (Brisbane)
Avanti Fresh Produce Pty Ltd (Melbourne)	Kelly's (Melbourne)
Costa Farms (Adelaide)	Murray Bros (Brisbane)
Costa Farms (Brisbane)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Melbourne)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Perth)	The La Manna Group (Adelaide)
Dykes Bros (Melbourne)	The La Manna Group (Brisbane)
Etherington (Perth)	The La Manna Group (Melbourne)
Exotic Fruit Traders (Sydney)	United Fresh (Adelaide)
Fresh Choice WA Pty Ltd (Perth)	

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

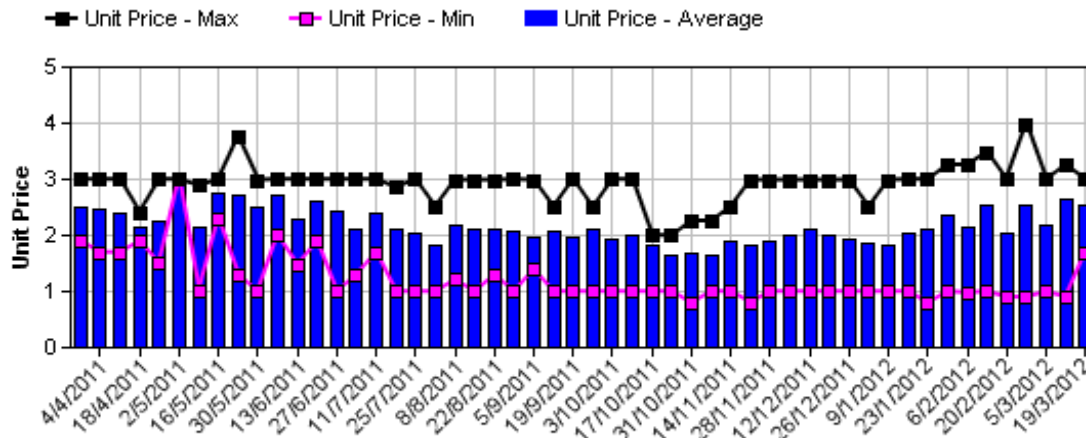
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales		7,728		7,728		247		247	449		1,224		1,224	223		8,399		8,399
Total non supermarket sales	2,404	3,052	1,275	6,731	417	474	60	951	1,729						3,162	3,914	1,384	8,460
Total exports																		
Total sales	2,404	10,780	1,275	14,459	417	721	60	1,198	2,178		1,224		1,224	223	3,162	12,313	1,384	16,859
Total Stock on Hand	303	1,870	219	2,392											303	1,870	219	2,392
QLD																		
Total supermarket sales	9,031	7,085		16,116		169		169	307		1,980		1,980	360	9,031	7,752		16,783
Total non supermarket sales	21,136	4,386	406	25,928		1,737	10	1,747	3,176						21,136	7,544	424	29,104
Total exports		2,414		2,414												2,414		2,414
Total sales	30,167	13,885	406	44,458		1,906	10	1,916	3,484		1,980		1,980	360	30,167	17,710	424	48,302
Total Stock on Hand	21,690	3,160	103	24,953		921	10	931	1,693						21,690	4,835	121	26,646
SA & TAS																		
Total supermarket sales		9,779		9,779		96		96	175							9,954		9,954
Total non supermarket sales	4,015	82	392	4,489	304	15	26	345	627						4,568	109	439	5,116
Total exports																		
Total sales	4,015	9,861	392	14,268	304	111	26	441	802						4,568	10,063	439	15,070
Total Stock on Hand	9,755	2,334	4,350	16,439	334	81	1,622	2,037	3,704						10,362	2,481	7,299	20,143
VIC																		
Total supermarket sales		13,747	928	14,675		57		57	104		1,440		1,440	262		14,113	928	15,041
Total non supermarket sales	8,061	3,025	2,347	13,433	814	141	30	985	1,791						9,541	3,281	2,401	15,224
Total exports																		
Total sales	8,061	16,772	3,275	28,109	814	198	30	1,042	1,895		1,440		1,440	262	9,541	17,394	3,329	30,265
Total Stock on Hand	11,349	1,832	857	14,038	127	114	70	311	565						11,580	2,039	984	14,604
WA																		
Total supermarket sales	306	4,960	678	5,944											306	4,960	678	5,944
Total non supermarket sales	2,204	592	176	2,972	558		115	673	1,224						3,219	592	385	4,196
Total exports																		
Total sales	2,510	5,552	854	8,916	558		115	673	1,224						3,525	5,552	1,063	10,140
Total Stock on Hand	587	879	254	1,720	275		38	313	569						1,087	879	323	2,289
Total																		
Total supermarket sales	9,337	43,299	1,606	54,242		569		569	1,035		4,644		4,644	844	9,337	45,178	1,606	56,121
Total non supermarket sales	37,820	11,137	4,596	53,553	2,093	2,367	241	4,701	8,547						41,626	15,441	5,034	62,101
Total exports		2,414		2,414												2,414		2,414
Total sales	47,157	56,850	6,202	110,209	2,093	2,936	241	5,270	9,582		4,644		4,644	844	50,963	63,033	6,640	120,635
Total Stock on Hand	43,684	10,075	5,783	59,542	736	1,116	1,740	3,592	6,531						45,022	12,104	8,946	66,073



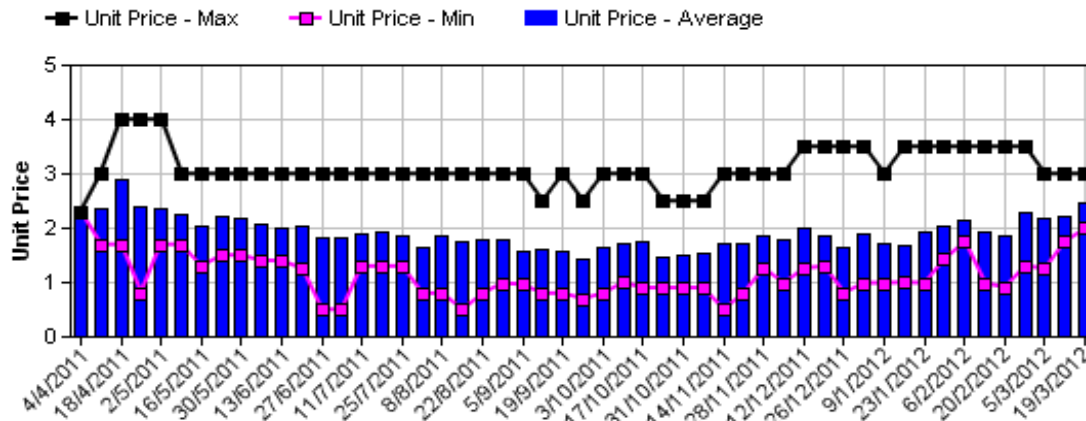
Hass Avocado Average Retail Prices - Sydney



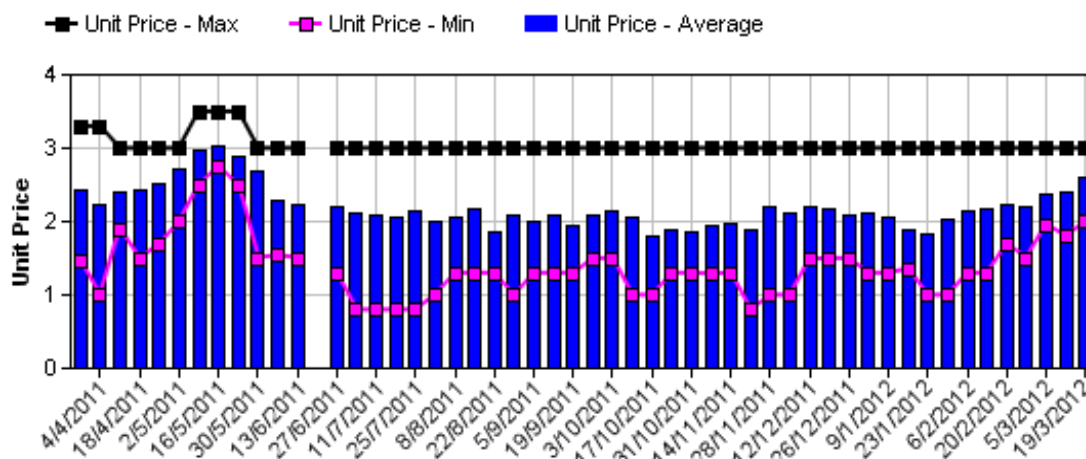
Hass Avocado Average Retail Prices - Melbourne



Hass Avocado Average Retail Prices - Brisbane

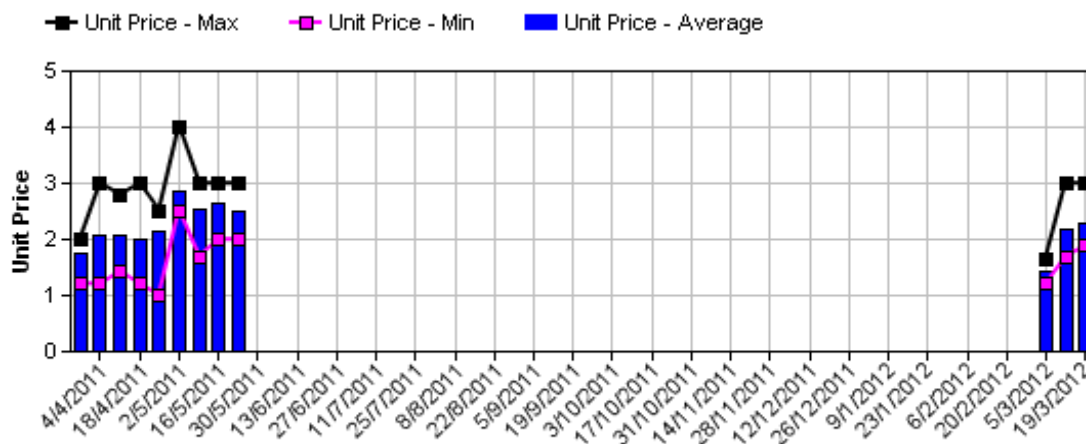


Hass Avocado Average Retail Prices - Perth

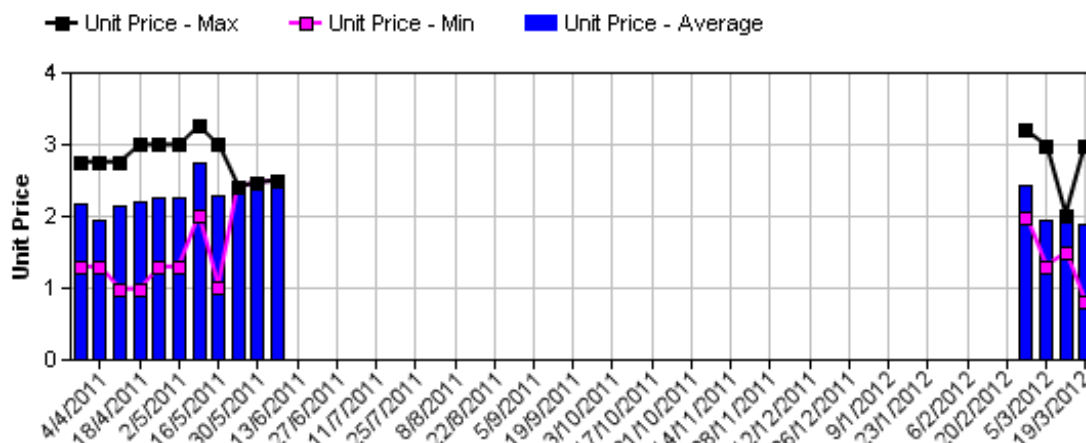


Assessment Date [Week Commencing]

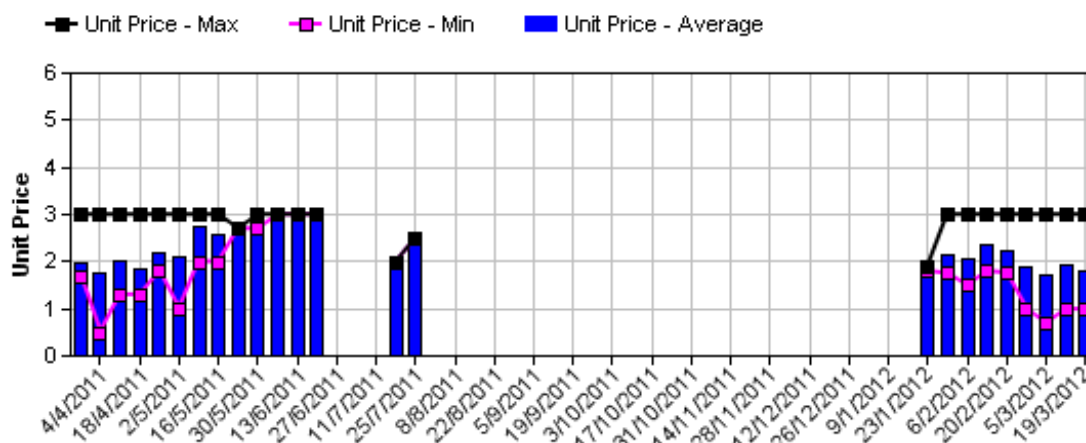
Shepard Avocado Average Retail Prices - Sydney



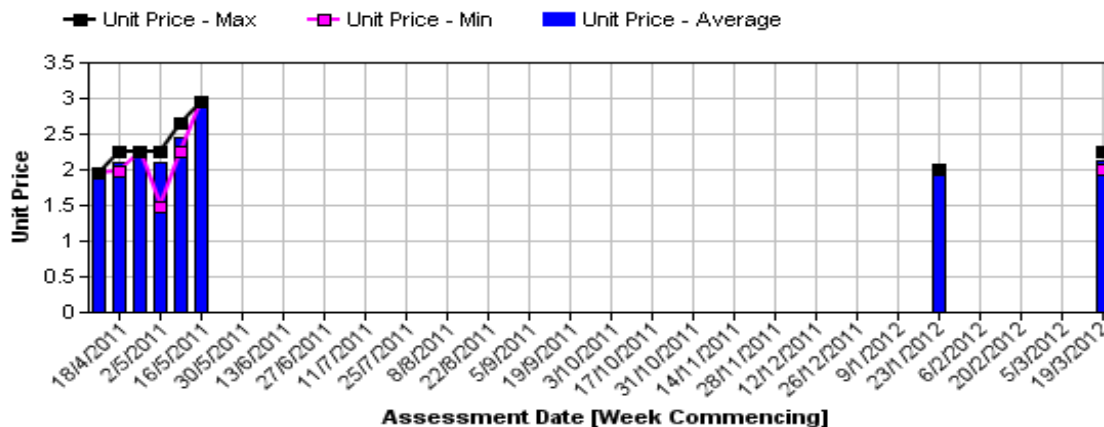
Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety - 19th March 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
IGA	Shepard	215	1.88	No	Aus	I	Shepard	235	0.79	No	NS
Woolworths	Shepard	230	1.98	No	Aus	Coles	Shepard	240	1.30	Cat	Aus
Coles	Shepard	240	1.98	No	Aus	Coles	Shepard	290	1.30	Cat	Aus
Coles	Shepard	230	1.98	No	Aus	Coles	Shepard	280	1.30	Cat	Aus
Woolworths	Shepard	240	1.98	No	Aus	IGA	Hass	290	1.69	No	Aus
Coles	Shepard	240	1.98	No	Aus	IS	Shepard	250	1.69	No	Aus
Woolworths	Shepard	220	1.98	No	Aus	Safeway	Shepard	300	1.98	No	Aus
I	Shepard	220	1.99	No	Aus	Safeway	Shepard	285	1.98	No	Aus
IGA	Shepard	275	2.05	No	Aus	Safeway	Shepard	285	1.98	No	Aus
I	Shepard	300	2.49	No	Aus	I	Shepard	240	1.99	No	NS
I	Shepard	310	2.49	No	Aus	I	Hass	263	1.99	No	Mixed
I	Reed	570	2.49	No	Aus	I	Shepard	285	2.69	No	NS
Foodworks	Shepard	250	2.49	No	Aus	I	Shepard	290	2.69	No	NS
I	Reed	500	2.50	No	Aus	I	Hass	310	2.98	No	Aus
I	Reed	530	2.50	No	Aus	I	Shepard	275	2.98	No	Aus
I	Reed	490	2.50	No	Aus	I	Hass	285	2.99	No	NS
I	Reed	470	2.99	No	Aus	I	Hass	270	2.99	No	Aus
Foodworks	Hass	270	2.99	No	NZ	PERTH					
I	Shepard	280	2.99	No	Aus	Coles	Reed	310	1.00	No	Aus
I	Reed	540	2.99	No	Aus	I	Hass	295	1.99	No	NZ
I	Shepard	270	2.99	No	Aus	I	Hass	230	1.99	No	NZ
I	Shepard	280	2.99	No	Aus	IS	Shepard	260	1.99	Store	Aus
I	Hass	280	3.49	No	Aus	Woolworths	Shepard	260	2.25	No	Aus
I	Hass	290	3.49	No	Aus	Coles	Reed	340	2.25	No	Aus
I	Reed	500	3.99	No	Aus	Coles	Hass	235	2.48	No	Aus
BRISBANE						Coles	Hass	235	2.48	No	Aus
Woolworths	Shepard	200	0.98	Cat	Aus	Woolworths	Hass	235	2.48	No	Aus
IGA	Shepard	140	0.99	Cat	Aus	Coles	Hass	240	2.48	No	Aus
IGA	Shepard	220	0.99	Cat	Aus	Woolworths	Hass	295	2.48	No	Aus
IGA	Shepard	160	0.99	Cat	Aus	Woolworths	Hass	350	2.48	Store	Aus
Woolworths	Shepard	195	1.65	Cat	Aus	IGA	Hass	240	2.49	No	Aus
I	Shepard	220	1.68	Store	Aus	I	Hass	260	2.49	No	Mixed
Coles	Shepard	220	1.75	No	Aus	IGA	Hass	250	2.49	No	NZ
Coles	Shepard	180	1.75	No	Aus	I	Hass	270	2.69	No	NZ
Coles	Shepard	185	1.75	No	Aus	IGA	Hass	250	2.89	No	Aus
I	Shepard	295	1.79	Store	Aus	I	Hass	280	2.99	No	Aus
I	Reed	410	1.99	No	Aus	IGA	Hass	295	2.99	No	NZ
I	Hass	260	1.99	Store	NZ	IS	Hass	380	2.99	No	NZ
I	Hass	250	1.99	No	NZ						
I	Shepard	280	1.99	Store	Aus						
I	Hass	250	2.89	Store	NS						
I	Shepard	245	2.99	Store	Aus						
I	Hass	265	2.99	Store	NZ						
I	Shepard	260	2.99	Store	Aus						
I	Shepard	310	2.99	Store	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