



INFOCADO WEEKLY REPORT: 8th — 14th March 2014 (Wk 11)



Comments

- The average retail prices across most of the capital cities have reduced slightly in the past couple of weeks, Hass being the exception in Perth and Shepard the exception in Sydney where they have held at similar level to previous weeks.
- The weekly dispatches in the last week have closely aligned with the forecast compared to the previous weeks. AAL would like to thank all contributors for their accuracy in entering weekly data.
- The New Zealand imports for the month of February were well aligned with the forecast. The remaining fruit will finish in March with total seasonal supply forecast to be slightly above previous estimates. Australian Avocados now dominate the domestic marketplace.
- The Sydney Metro Qualicado workshop was held last week on 13 March 2014, feedback collected after the event indicated that the event was a success. The next Qualicado workshop will be held on the Sunshine Coast on 20 March 2014 which will be focused on growers and packers. All in the area are invited to attend. For more information visit the AAL website and view Events or contact our office directly.

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 | Foundation Day WA: 2nd June

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

[Click here to learn How to conduct Dry Matter tests at home](#)

[Click here to for a refresher on how to contribute to Infocado](#)

[Click here for tips for using and interpreting Infocado Reports](#)

[Click here to download avocado supply chain education materials](#)

IMPORTANT and PLEASE NOTE:

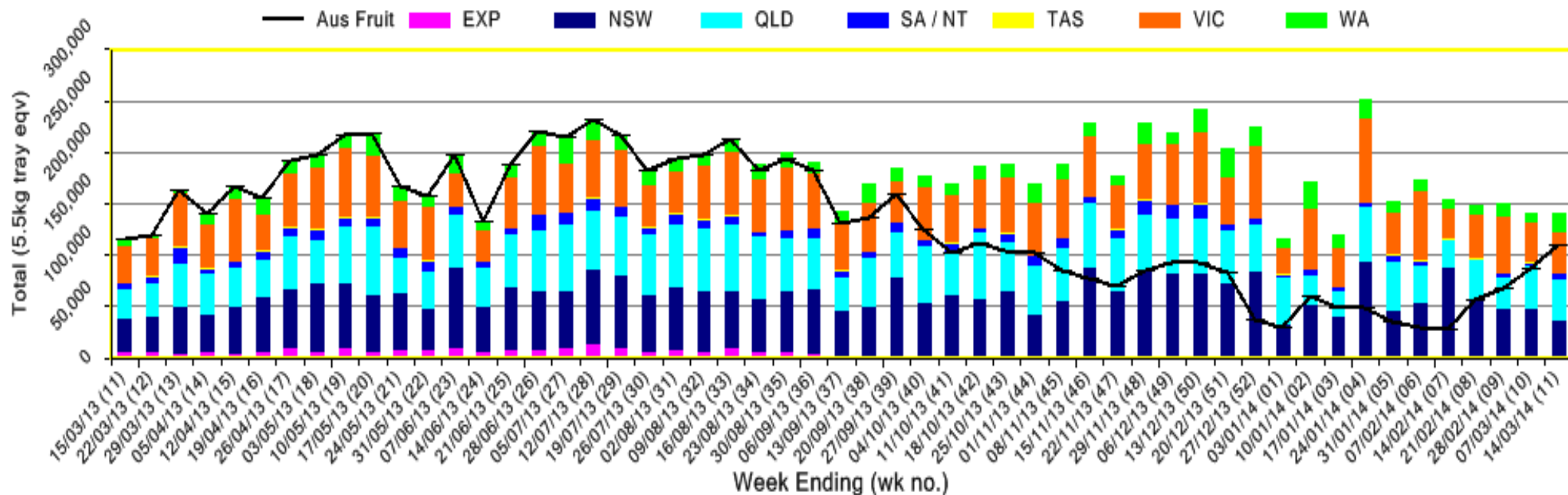
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons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

This message is intended only for the use of the addressee, is confidential and may also be legally privileged. If you are not the intended recipient, please notify us immediately. You should not copy it or use it for any purpose, nor disclose its contents to any other person. If you have already received this transmission in error, please notify us immediately by telephone and delete all copies of this transmission together with any attachments. The views and opinions expressed in this e-mail message are the author's own and may not reflect the views and opinions of Avocados Australia Limited.

Industry Dispatches By Destination State and Count Size : 8th March - 14th March 2014 (Wk 11)

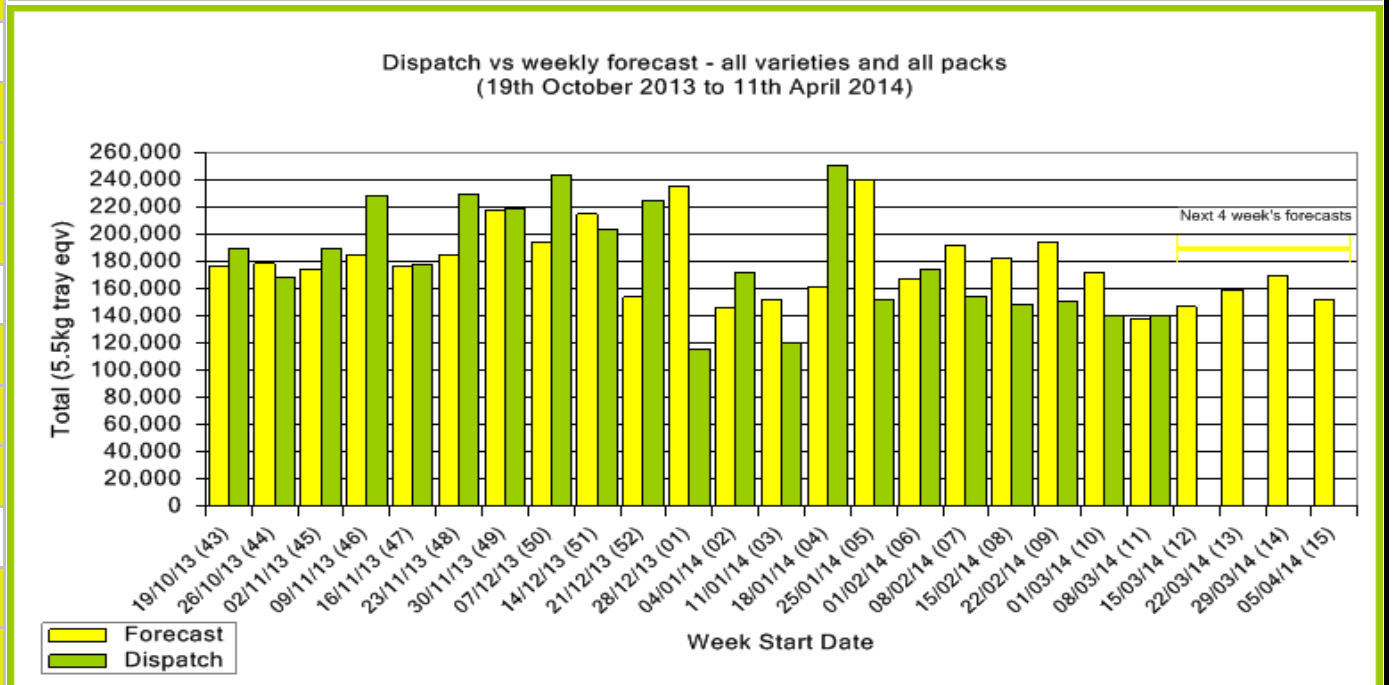
| Dest. State | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | Trays - Total | Bulk | P/PK | Proc | 5.5Kg Eqv Trays All |
|--------------|--------------|--------------|---------------|--------------|---------------|---------------|---------------|--------------|----------------|---------------|---------------|--------------|---------------------|
| | 16 | 18 | 20 | 22 | 23 | 25 | 28 | 28+ | 5.5Kg Eqv | 10Kg | Kg | Kg | Total |
| EXP | | | | | | | | 304 | 304 | | | | 304 |
| NSW | 741 | 2,565 | 6,861 | 1,519 | 6,183 | 3,405 | 3,680 | 2,792 | 27,746 | 4,051 | 6,600 | | 36,311 |
| QLD | 127 | 1,641 | 5,353 | 1,434 | 4,825 | 12,311 | 5,944 | 1,182 | 32,817 | 3,286 | 6,000 | 3,400 | 40,501 |
| SA / NT | 22 | 503 | 1,074 | | 220 | 202 | 1,672 | | 3,693 | 363 | 1,200 | | 4,571 |
| TAS | | | | | | | 921 | | 921 | | | | 921 |
| VIC | 454 | 2,368 | 6,165 | 1,900 | 9,556 | 8,964 | 2,928 | 1,903 | 34,238 | 2,660 | 6,600 | | 40,274 |
| WA | 309 | 723 | 1,614 | | 2,505 | 7,338 | 2,596 | 2,828 | 17,913 | | | | 17,913 |
| Total | 1,653 | 7,800 | 21,067 | 4,853 | 23,289 | 33,141 | 16,820 | 9,009 | 117,632 | 10,360 | 20,400 | 3,400 | 140,795 |

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 1,722,170 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 08/03/2014 | | | | | |
| Hass | 23,570 | 100 | | | 23,752 |
| Shepard | 98,331 | 6,380 | 20,000 | 4,000 | 114,294 |
| Week Total | 121,901 | 6,480 | 20,000 | 4,000 | 138,046 |
| Week 12 - begin 15/03/2014 | | | | | |
| Hass | 8,608 | 25 | | | 8,653 |
| Shepard | 121,831 | 6,630 | 20,000 | 4,400 | 138,322 |
| Week Total | 130,439 | 6,655 | 20,000 | 4,400 | 146,975 |
| Week 13 - begin 22/03/2014 | | | | | |
| Hass | 3,500 | 1,000 | | | 5,318 |
| Shepard | 137,331 | 7,130 | 18,000 | 4,000 | 154,295 |
| Week Total | 140,831 | 8,130 | 18,000 | 4,000 | 159,613 |
| Week 14 - begin 29/03/2014 | | | | | |
| Hass | 14,000 | 2,200 | | | 18,000 |
| Sharwil | 200 | 60 | | | 309 |
| Shepard | 136,331 | 6,680 | 15,000 | 2,500 | 151,658 |
| Week Total | 150,531 | 8,940 | 15,000 | 2,500 | 169,968 |
| Week 15 - begin 05/04/2014 | | | | | |
| Hass | 29,000 | 3,000 | | | 34,455 |
| Shepard | 107,000 | 3,980 | 15,000 | 2,500 | 117,418 |
| Week Total | 136,000 | 6,980 | 15,000 | 2,500 | 151,873 |

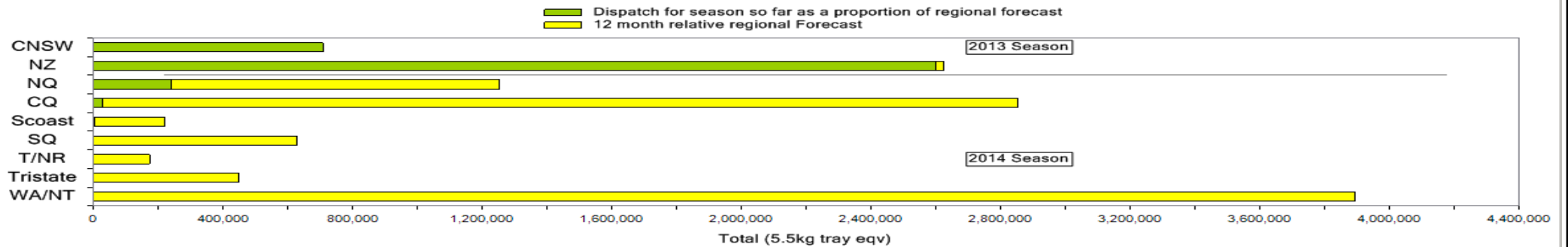
| Green shading indicates dispatch data | | Yellow shading indicates forecast data | | | |
|---|----------------|--|---------------|--------------|----------------|
| Dispatch Data (Week 11 - begin 8/03/2014) | | | | | |
| Variety | Trays | Bulk | P/PK | Proc | 5.5Kg Eqv |
| | 5.5Kg Eqv | 10Kg | Kg | Kg | Total Trays |
| Hass | 32,803 | 111 | | | 33,005 |
| Shepard | 84,829 | 10,249 | 20,400 | 3,400 | 107,791 |
| Total | 117,632 | 10,360 | 20,400 | 3,400 | 140,795 |



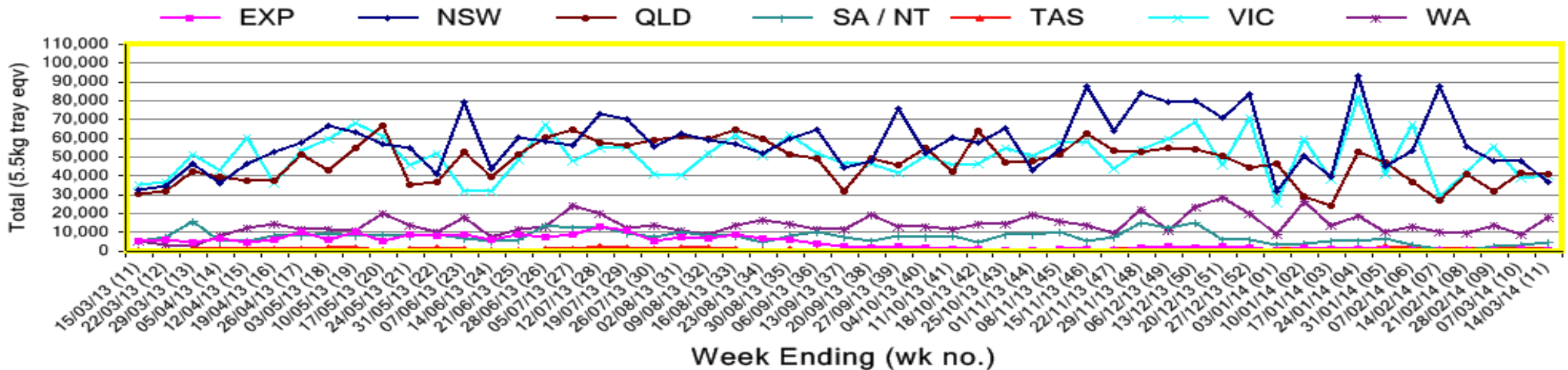
| New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2013-April 2014 | | | | | | | | | | |
|---|---------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|-----|------------------|
| Export Dest'n | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | Total to Date |
| NZ Export to Australia Forecast | 0 | 145,700 | 338,000 | 424,000 | 564,865 | 642,687 | 435,405 | 38,984 | 0 | 2,588,932 |
| Australia (from Infocado) | 16,341 | 83,173 | 283,934 | 582,190 | 587,056 | 596,527 | 450,236 | 87,703 | | 2,687,160 |
| USA¹ | 0 | 0 | 0 | 0 | 0 | 0 | | | | 0 |
| Japan¹ | 0 | 8,272 | 38,102 | 48,498 | 26,806 | 2,634 | | | | 124,312 |
| Other Asia¹ | 0 | 12,075 | 33,107 | 44,293 | 47,072 | 23,811 | | | | 160,358 |
| Total | 16,341 | 103,520 | 355,143 | 674,981 | 660,934 | 622,972 | 450,236 | 87,703 | | 2,971,830 |

1 source: Statistics NZ adjusted for freight time to destination

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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 1,722,170 5.5kg tray eqv



Week 11 contributors - Packhouses

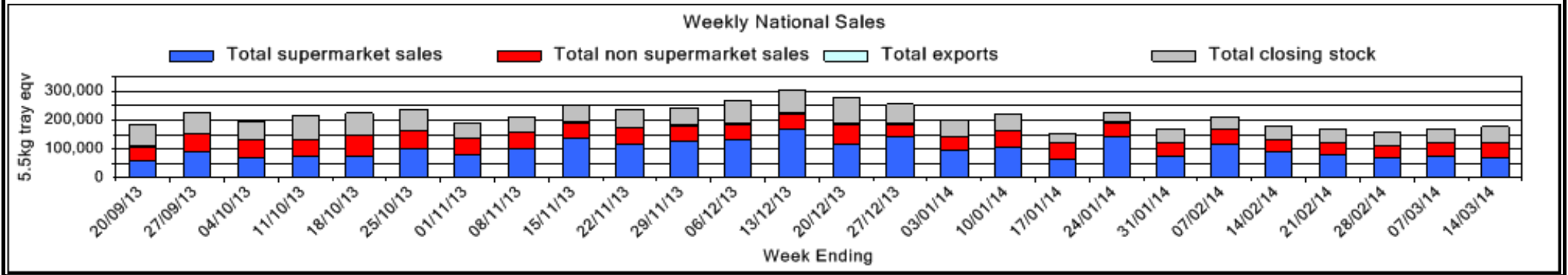
| | |
|--------------------------------------|--|
| Natures Fruit Company (Consolidator) | Bellview Orchards Pty Ltd (NQ) |
| One Harvest (Consolidator) | R & M Waterman (NQ) |
| Sunfresh (Consolidator) | Battistin Orchards Pty Ltd (NQ) |
| The Avolution (Consolidator) | Gunnado Farm (NQ) |
| SuperPak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

Week 11 contributors - Wholesalers

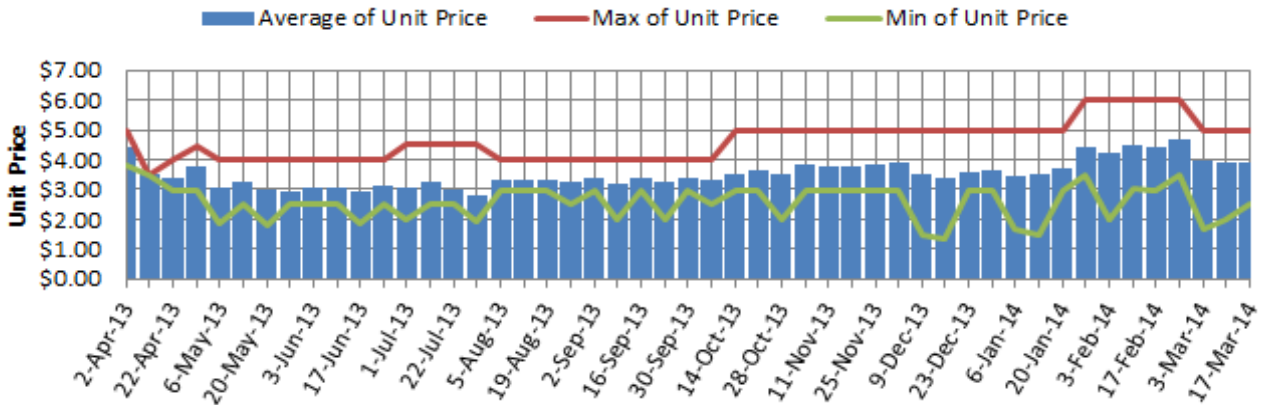
| | |
|---|---------------------------------------|
| Allcrops Pty Ltd (Sydney) | Fresh Express Produce Pty Ltd (Perth) |
| C & S Ponte Produce Pty Ltd (Melbourne) | Murray Bros (Brisbane) |
| Costa Farms (Adelaide) | Premier Fruits Pty Ltd (Melbourne) |
| Costa Farms (Brisbane) | Sculli & Co Pty Ltd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

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

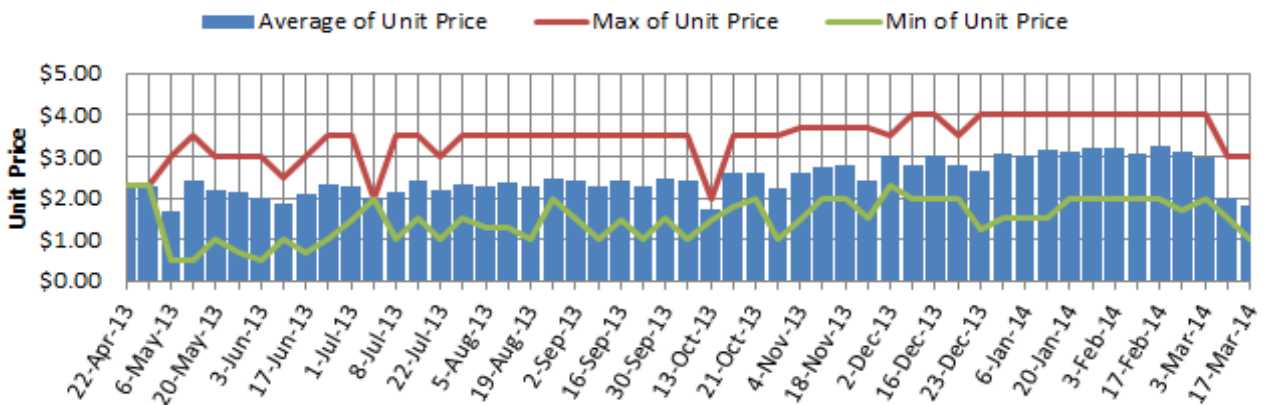
| | Trays 5.5kg eqv (incl. Mod6 & P84) | | | | Bulk 10Kg Cartons | | | | | Pre-Pack Kg | | | | | Total (5.5Kg Eqv) | | | |
|------------------------------------|---|---------------|--------------|----------------|-------------------|--------------|-----------|--------------|--------------|-------------|---------------|-------|---------------|--------------|-------------------|---------------|--------------|----------------|
| | 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 | 7,238 | 3,960 | | 11,198 | 953 | | | 953 | 1,733 | | 6,600 | | 6,600 | 1,200 | 8,971 | 5,160 | | 14,131 |
| Total Stock on Hand | | | | | | | | | | | | | | | | | | |
| QLD | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 5,128 | 17,893 | | 23,021 | | 901 | | 901 | 1,638 | | 6,000 | | 6,000 | 1,091 | 5,128 | 20,622 | | 25,750 |
| Total non supermarket sales | 13,124 | 5,567 | | 18,691 | | 684 | | 684 | 1,244 | | | | | | 13,124 | 6,811 | | 19,935 |
| Total exports | | 304 | | 304 | | | | | | | | | | | | 304 | | 304 |
| Total sales | 18,252 | 23,764 | | 42,016 | | 1,585 | | 1,585 | 2,882 | | 6,000 | | 6,000 | 1,091 | 18,252 | 27,737 | | 45,989 |
| Total Stock on Hand | 23,352 | 3,626 | | 26,978 | | 914 | | 914 | 1,662 | | | | | | 23,352 | 5,288 | | 28,640 |
| SA & TAS | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | | 2,957 | 1,344 | 4,301 | | | | | | | 1,200 | | 1,200 | 218 | | 3,175 | 1,344 | 4,519 |
| Total non supermarket sales | 2,887 | 2,964 | 1,420 | 7,271 | 272 | 205 | 76 | 553 | 1,005 | | | | | | 3,382 | 3,337 | 1,558 | 8,276 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 2,887 | 5,921 | 2,764 | 11,572 | 272 | 205 | 76 | 553 | 1,005 | | 1,200 | | 1,200 | 218 | 3,382 | 6,512 | 2,902 | 12,796 |
| Total Stock on Hand | 2,884 | 3,048 | 2,064 | 7,996 | 89 | 1 | 95 | 185 | 336 | | | | | | 3,046 | 3,050 | 2,237 | 8,332 |
| VIC | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | | 15,951 | | 15,951 | | 384 | | 384 | 698 | | 6,600 | | 6,600 | 1,200 | | 17,849 | | 17,849 |
| Total non supermarket sales | 2,855 | 6,800 | | 9,655 | 759 | 486 | | 1,245 | 2,264 | | | | | | 4,235 | 7,684 | | 11,919 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 2,855 | 22,751 | | 25,606 | 759 | 870 | | 1,629 | 2,962 | | 6,600 | | 6,600 | 1,200 | 4,235 | 25,533 | | 29,768 |
| Total Stock on Hand | 5,860 | 5,566 | | 11,426 | 1,155 | 427 | | 1,582 | 2,876 | | | | | | 7,960 | 6,342 | | 14,302 |
| WA | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 7,973 | 5,000 | | 12,973 | 10 | | | 10 | 18 | | | | | | 7,991 | 5,000 | | 12,991 |
| Total non supermarket sales | 4,254 | | | 4,254 | 381 | | | 381 | 693 | | | | | | 4,947 | | | 4,947 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 12,227 | 5,000 | | 17,227 | 391 | | | 391 | 711 | | | | | | 12,938 | 5,000 | | 17,938 |
| Total Stock on Hand | 1,182 | | | 1,182 | 24 | | | 24 | 44 | | | | | | 1,226 | | | 1,226 |
| Total | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 14,968 | 45,761 | 1,344 | 62,073 | 10 | 1,285 | | 1,295 | 2,355 | | 20,400 | | 20,400 | 3,709 | 14,986 | 51,806 | 1,344 | 68,137 |
| Total non supermarket sales | 28,491 | 15,331 | 1,420 | 45,242 | 2,365 | 1,375 | 76 | 3,816 | 6,938 | | | | | | 32,791 | 17,831 | 1,558 | 52,180 |
| Total exports | | 304 | | 304 | | | | | | | | | | | | 304 | | 304 |
| Total sales | 43,459 | 61,396 | 2,764 | 107,619 | 2,375 | 2,660 | 76 | 5,111 | 9,293 | | 20,400 | | 20,400 | 3,709 | 47,777 | 69,941 | 2,902 | 120,621 |
| Total Stock on Hand | 36,272 | 12,240 | 2,064 | 50,576 | 1,748 | 1,342 | 95 | 3,185 | 5,791 | | | | | | 39,450 | 14,680 | 2,237 | 56,367 |



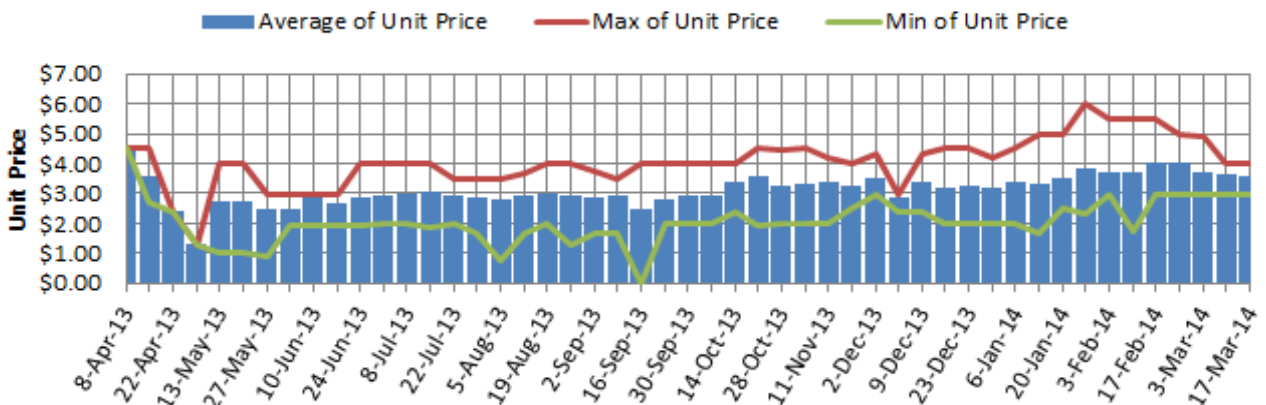
Hass Avocado Average Retail Prices - Sydney



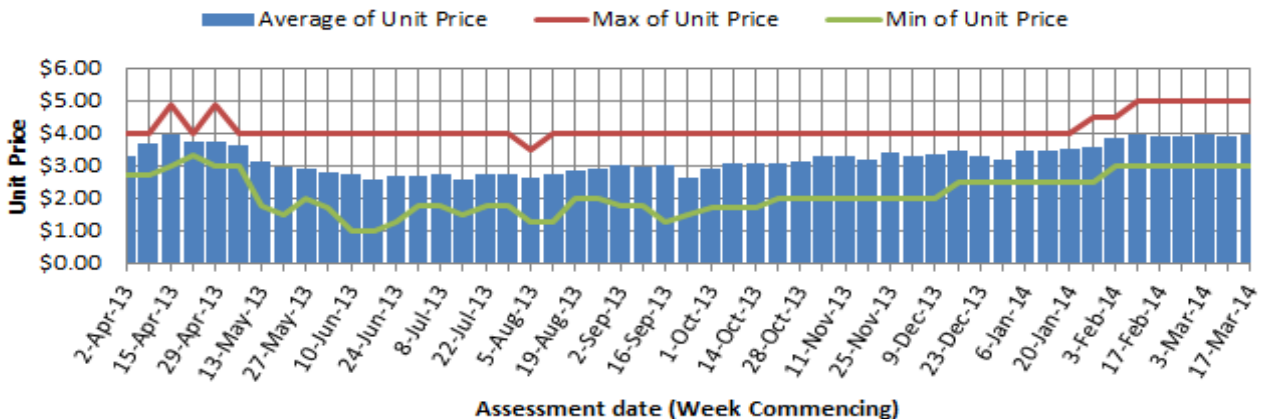
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

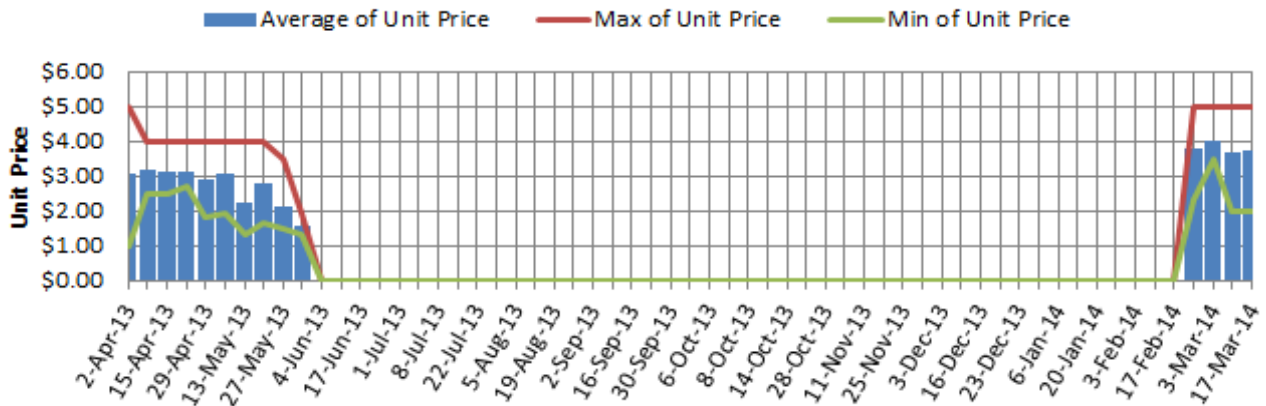


Hass Avocado Average Retail Prices - Perth

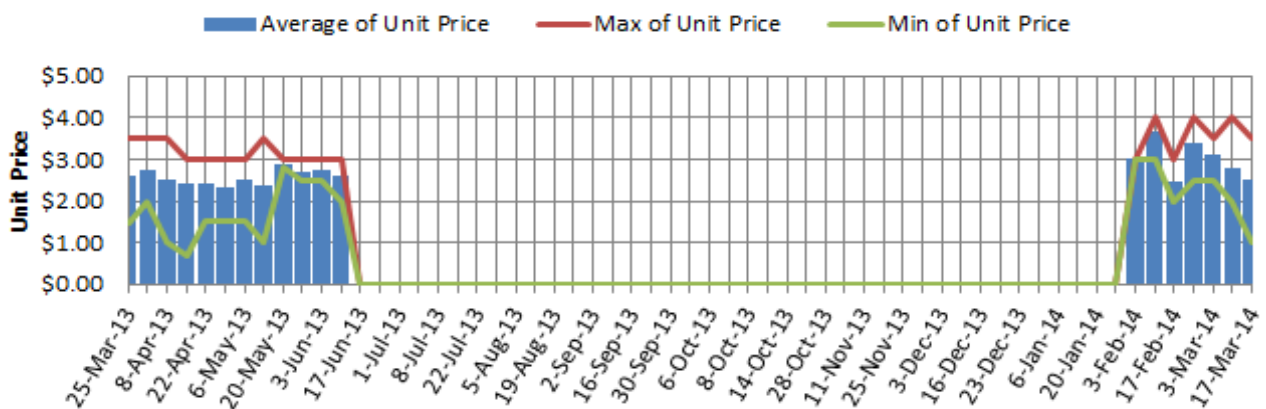


Assessment date (Week Commencing)

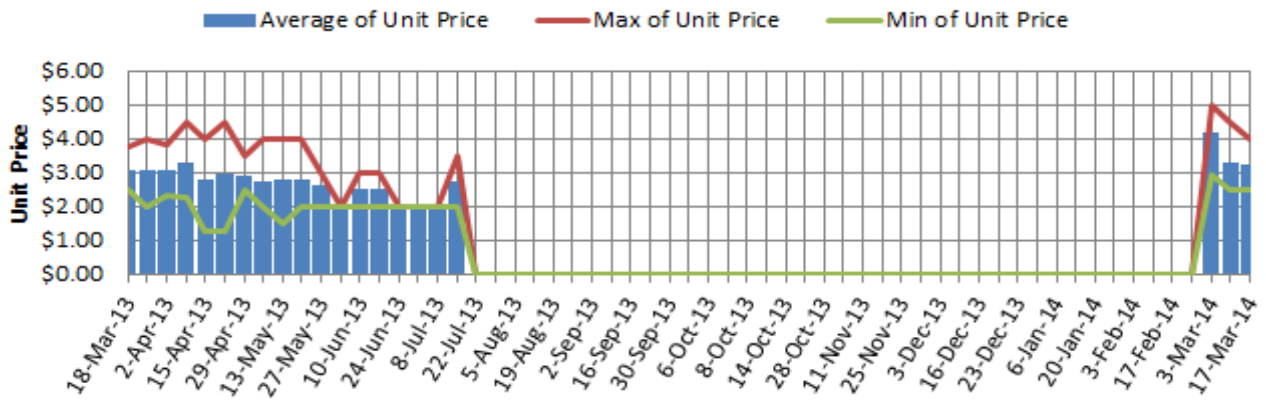
Shepard Avocado Average Retail Prices - Sydney



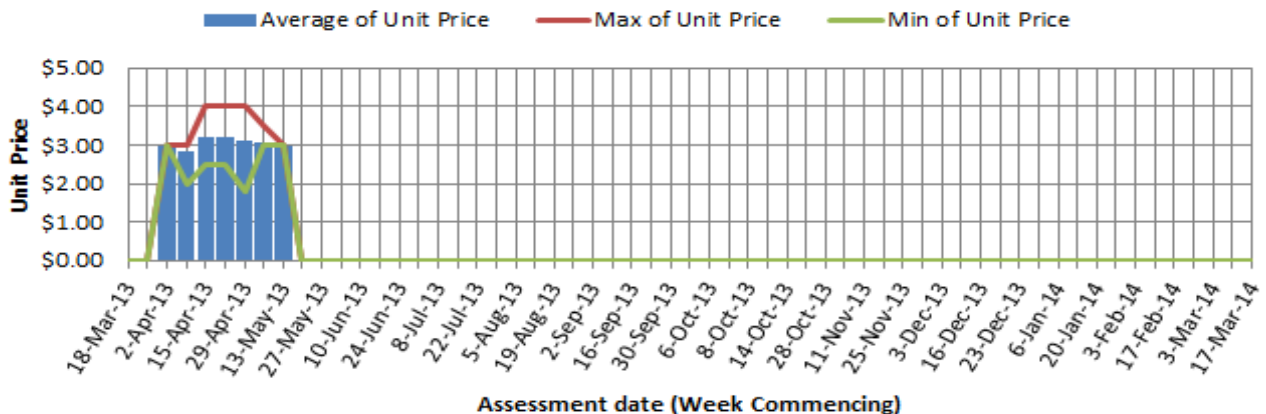
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 11th March 2014

| 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 | 210 | 1.99 | No | Aus | Coles | Shepard | 215 | 2.48 | Store | Aus |
| I | Hass | 210 | 2.50 | Store | NZ | Coles | Shepard | 250 | 2.48 | Store | Aus |
| Woolworths | Shepard | 250 | 2.98 | No | Aus | Coles | Shepard | 220 | 2.48 | Store | Aus |
| Woolworths | Shepard | 250 | 2.98 | No | Aus | I | Hass | 190 | 2.99 | No | NZ |
| Coles | Shepard | 300 | 2.98 | No | Aus | I | Hass | 270 | 2.99 | No | NZ |
| Woolworths | Shepard | 250 | 2.98 | No | Aus | Safeway | Shepard | 270 | 3.48 | No | Aus |
| Coles | Shepard | 300 | 2.98 | No | Aus | Safeway | Shepard | 320 | 3.48 | No | Aus |
| I | Hass | 210 | 2.99 | No | NZ | Safeway | Shepard | 280 | 3.48 | No | Aus |
| I | Hass | 220 | 2.99 | Store | NZ | IGA | Hass | 250 | 3.99 | No | NZ |
| Coles | Shepard | 220 | 3.48 | No | Aus | IS | Hass | 250 | 3.99 | No | NZ |
| IGA | Shepard | 250 | 3.98 | No | Aus | I | Shepard | 275 | 3.99 | No | Aus |
| Foodworks | Hass | 270 | 3.99 | No | NZ | I | Hass | 260 | 3.99 | No | NZ |
| I | Shepard | 260 | 3.99 | No | Aus | I | Shepard | 310 | 3.99 | No | Aus |
| I | Shepard | 260 | 3.99 | No | Aus | PERTH | | | | | |
| IGA | Hass | 240 | 4.95 | No | NZ | Coles | Hass | 225 | 2.98 | No | NZ |
| I | Shepard | 320 | 4.99 | No | Aus | Coles | Hass | 210 | 2.98 | No | NZ |
| I | Hass | 240 | 4.99 | No | Aus | Coles | Hass | 245 | 2.98 | No | NZ |
| I | Shepard | 310 | 4.99 | No | Aus | I | Hass | 225 | 3.49 | No | Aus |
| I | Hass | 290 | 4.99 | No | Aus | Woolworths | Hass | 230 | 3.98 | No | NZ |
| I | Shepard | 330 | 4.99 | No | Aus | I | Hass | 245 | 3.98 | No | NZ |
| I | Shepard | 290 | 4.99 | No | Aus | Woolworths | Hass | 210 | 3.98 | No | NZ |
| BRISBANE | | | | | | Woolworths | Hass | 230 | 3.98 | No | NZ |
| I | Hass | 145 | 1.00 | Store | NZ | I | Hass | 270 | 3.99 | No | NZ |
| I | Shepard | 210 | 1.00 | Store | Aus | IGA | Hass | 245 | 3.99 | No | NZ |
| I | Hass | 145 | 1.49 | Store | NZ | I | Hass | 220 | 3.99 | No | NZ |
| I | Shepard | 210 | 1.49 | Store | Aus | I | Hass | 220 | 3.99 | No | Aus |
| I | Shepard | 175 | 1.99 | No | Aus | IS | Hass | 280 | 4.49 | No | NZ |
| IGA | Shepard | 170 | 1.99 | Store | Aus | IGA | Hass | 280 | 4.49 | No | NZ |
| Coles | Shepard | 220 | 2.00 | Store | Aus | IGA | Hass | 250 | 4.99 | No | NZ |
| Woolworths | Shepard | 200 | 2.00 | Store | Aus | IGA | Hass | 295 | 4.99 | No | NZ |
| Coles | Shepard | 190 | 2.00 | Store | Aus | | | | | | |
| Woolworths | Shepard | 200 | 2.00 | Store | Aus | | | | | | |
| Woolworths | Shepard | 205 | 2.00 | Store | Aus | | | | | | |
| Coles | Shepard | 200 | 2.00 | Store | Aus | | | | | | |
| Woolworths | Shepard | 200 | 2.48 | Store | Aus | | | | | | |
| Woolworths | Shepard | 200 | 2.48 | Store | Aus | | | | | | |
| I | Shepard | 240 | 2.50 | No | Aus | | | | | | |
| Coles | Shepard | 200 | 2.98 | Store | Aus | | | | | | |
| Coles | Shepard | 220 | 2.98 | Store | Aus | | | | | | |
| Woolworths | Shepard | 205 | 2.98 | Store | Aus | | | | | | |
| Coles | Shepard | 190 | 2.98 | Store | Aus | | | | | | |
| I | Hass | 200 | 2.99 | No | NZ | | | | | | |
| I | Shepard | 215 | 3.00 | Store | Aus | | | | | | |
| I | Shepard | 240 | 3.00 | Store | Aus | | | | | | |
| I | Shepard | 298 | 3.00 | Store | Aus | | | | | | |
| I | Shepard | 298 | 3.49 | Store | Aus | | | | | | |
| IGA | Shepard | 200 | 3.49 | No | Aus | | | | | | |
| I | Shepard | 215 | 3.50 | 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