



INFOCADO WEEKLY REPORT: 27th December—2nd January 2014 (Wk 1)



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Comments

- Higher volumes have moved through Melbourne markets approx. 20% more than Sydney. Size 20 fruit dominating (refer P 2).
- The weekly dispatch volume was slightly lighter than the weekly forecast though quite similar with only a variance of approx. 8,000 5.5kg tray equivalents (refer P 3).
- The four weekly forecast indicates a rise from next week forward in dispatches which trends to plateau over January 2015 (refer P 3).
- The New Year has heralded the start of the 2015 season for the NQ, CQ and SC regions of north-east Australia (refer P 4).
- Weekly national sales has gently increased in comparison to last week and retrospect aids to display fruit movement over the period of record high volumes that the industry witnessed Oct—Dec 2014 (refer P 5).
- Average retail price per Hass avocado continues to hold steady across all major cities at approx. \$3.00/fruit, Perth being the exception with the average holding steady at approx. \$3.50/fruit (refer P 6-8).

2014: A Marketing Year in Review

2014 has been a significant and successful year for the Australian Avocados marketing activity spearheaded with the launch of the new “Love that avocado feeling” national television campaign in April. This was supported by the relaunch of the Australian Avocados website, a renewed emphasis on social media through facebook advertising and new educational point of sale material developed and distributed to retail outlets. These consumer activities were also underpinned by the continuing Health and Nutrition education program targeting health professionals and the Foodservice Chef Training program for fresh avocados.

There were a number of key highlights which resulted from the campaign. All of which have been included in the last Guacamole that was released on 19 December 2014. Overall results from media monitoring and consumer tracking indicated a strong positive response from the targeted audiences. The media campaign has been successful in engaging a greater population throughout Australia and has encouraged increased consumption with Australian households. For a full brief please refer to the Guacamole Enewsletter - 19/12/2014

Upcoming Holiday

Australia Day: 26th Jan 2015 | Labour Day (WA): 2nd March 2015 | Good Friday: 3rd April 2015 | Easter Monday: 6th April 2015

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

IMPORTANT and PLEASE NOTE:

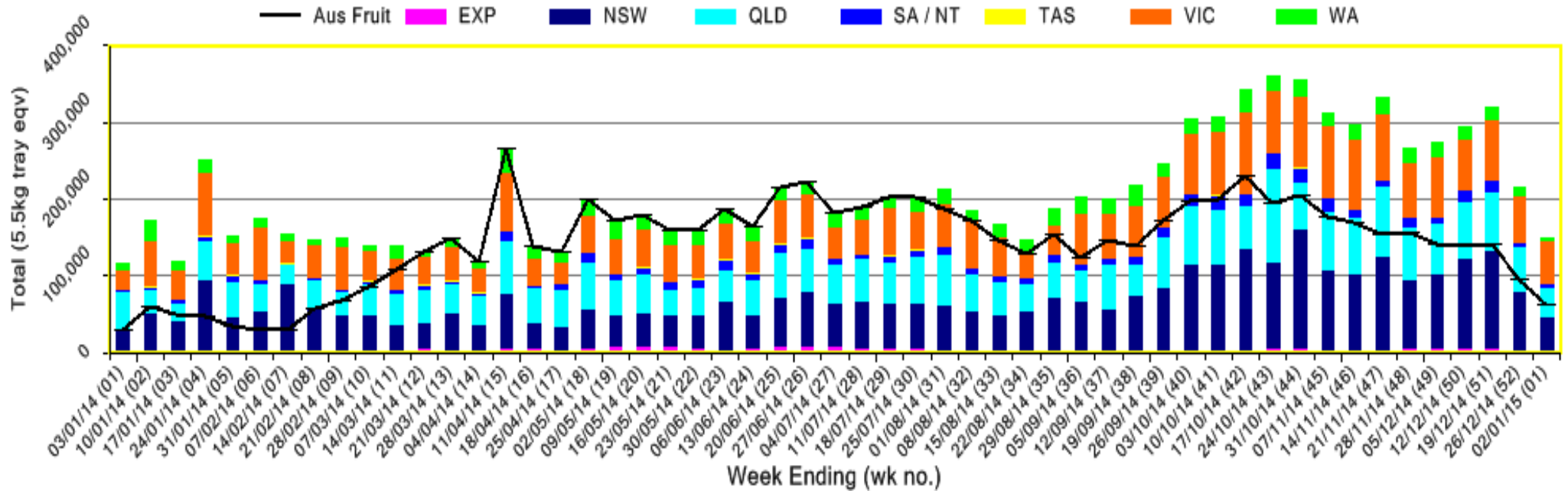
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 27th December 2014 - 2nd January 2015 (Wk 1)

Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	Oil	5.5Kg Eqv Trays All
	<16	16	18	20	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Total
EXP								640	640			640
NSW	692	2,381	4,586	8,811	7,926	9,170	4,623	4,421	42,610	1,094		44,599
QLD	320	2,275	3,274	7,936	7,584	8,062	4,032	4,024	37,507	96		37,682
SA / NT	160	358	1,209	1,277	320		2,300		5,624	192		5,973
TAS					36				36	545		1,027
VIC	12	1,927	5,271	16,051	11,140	12,165	3,615	3,213	53,394	591		54,469
WA		40	206	210	1,889	1,754	2,595	37	6,731	152	20	7,011
Total	1,184	6,981	14,546	34,285	28,895	31,151	17,165	12,335	146,542	2,670	20	151,401

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 151,401 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

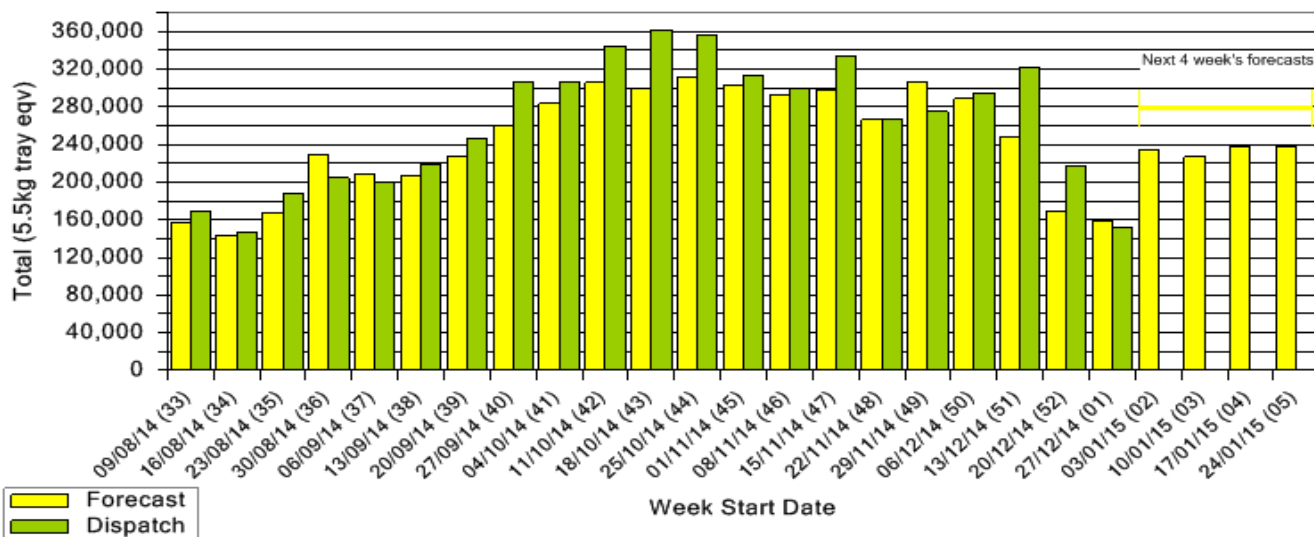
Forecast Data (Week 1 - 5)

Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 1 - begin 27/12/2014						
Hass	151,485	2,445		10		155,932
Lamb Hass	1,508	88				1,668
Reed	1,000	200			2,000	1,728
Week Total	153,993	2,733		10	2,000	159,328
Week 2 - begin 03/01/2015						
Hass	223,579	4,477	2,000	40		232,090
Lamb Hass		88				160
Reed	1,547	300			2,000	2,456
Week Total	225,126	4,865	2,000	40	2,000	234,706
Week 3 - begin 10/01/2015						
Hass	216,425	4,516	5,000	40		225,552
Reed	1,000	200			2,000	1,728
Week Total	217,425	4,716	5,000	40	2,000	227,280
Week 4 - begin 17/01/2015						
Hass	226,295	4,725	2,000	40		235,257
Lamb Hass	1,500					1,500
Reed	1,000	200			2,000	1,728
Week Total	228,795	4,925	2,000	40	2,000	238,485
Week 5 - begin 24/01/2015						
Hass	229,035	4,815	2,000	40		238,161
Week Total	229,035	4,815	2,000	40		238,161

Dispatch Data (Week 1 - begin 27/12/2014)

Variety	Trays	Bulk	Oil	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Total Trays
Hass	144,060	2,532	20	148,668
Lamb Hass	2,482	138		2,733
Total	146,542	2,670	20	151,401

Dispatch vs weekly forecast - all varieties and all packs
(9th August 2014 to 30th January 2015)

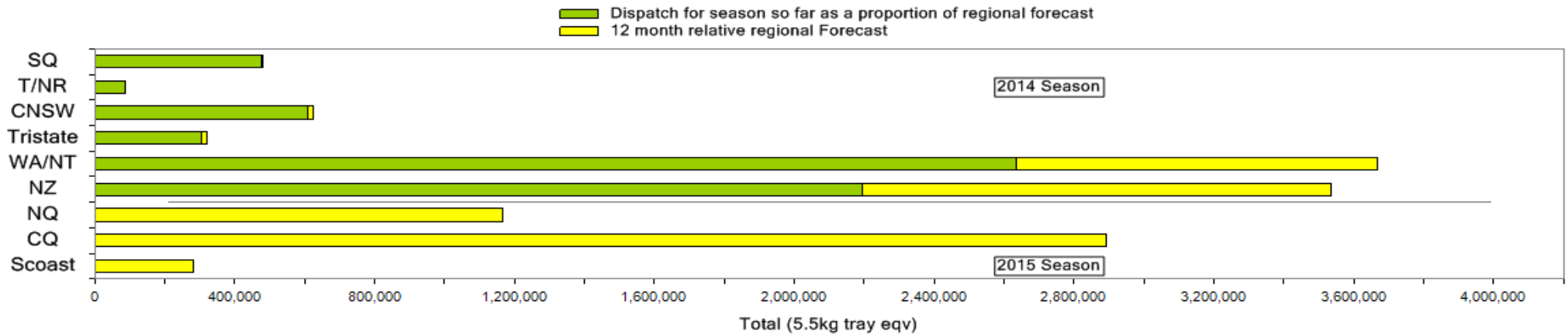


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

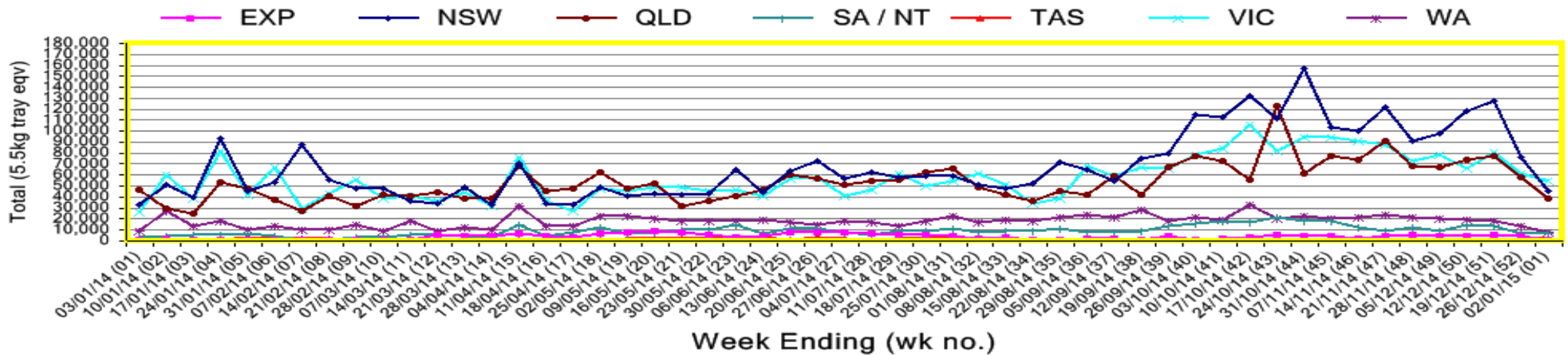
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	443,740	379,760	393,210	552,900	563,784	252,876	5,280	2,949,402
Australia (from Infocado)	123,747	293,918	653,001	561,186	596,008					2,227,860
USA¹	6	12,687	103,015	245,195	150,504					511,408
Japan¹	1,916	12,999	41,077	63,301	15,991					135,283
Other Asia¹	7,609	43,179	85,640	71,813	57,802					266,043
Total	133,278	362,783	882,733	941,495	820,305					3,140,594

¹ Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port.

Percentage dispatched by region (Based on seasonal forecast - 2015)



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 151,401 5.5kg tray eqv



Week 1 Contributors - Packhouses

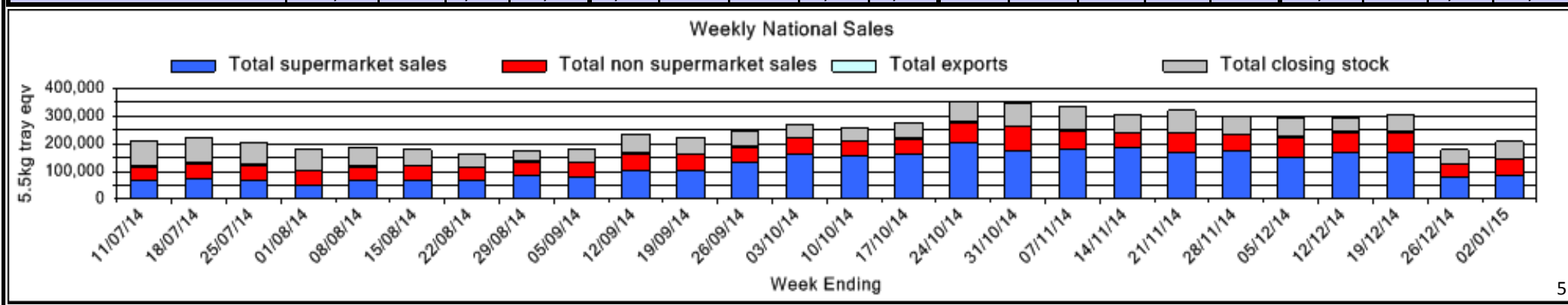
- Simpson Farms Pty Ltd (Consolidator)
- The Avolution (Consolidator)
- Advance Packing & Marketing Services P/L (WA)
- Avocado Industry Council (NZAGA)
- Avonova (WA)
- Box Organics (WA)
- Delroy Orchards (WA)
- Mariners Rest (WA)
- West Aussie Avos (WA)
- Willow Creek (WA)
- CNSW: Less than 3 contributors
- TRI: Less than 3 contributors

Week 1 Contributors - Wholesalers

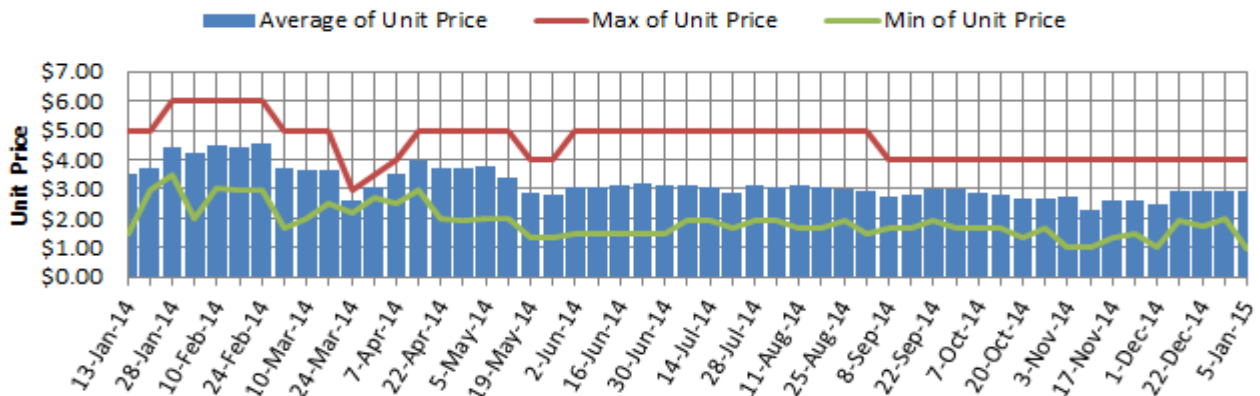
- Allcrops Pty Ltd (Sydney)
- C & S Ponte Produce Pty Ltd (Melbourne)
- Costa Farms (Adelaide)
- Costa Farms (Brisbane)
- Costa Farms (Melbourne)
- Dykes Bros (Melbourne)
- Etherington (Perth)
- Fresh Choice WA Pty Ltd (Perth)
- Murray Bros (Brisbane)
- Sculli & Co Pty Ltd (Melbourne)
- Sinclair & Antico (Aust) Pty Ltd (Sydney)
- The La Manna Group (Adelaide)
- The La Manna Group (Brisbane)
- The La Manna Group (Melbourne)
- United Fresh (Adelaide)
- WA Farm Direct (Perth)

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

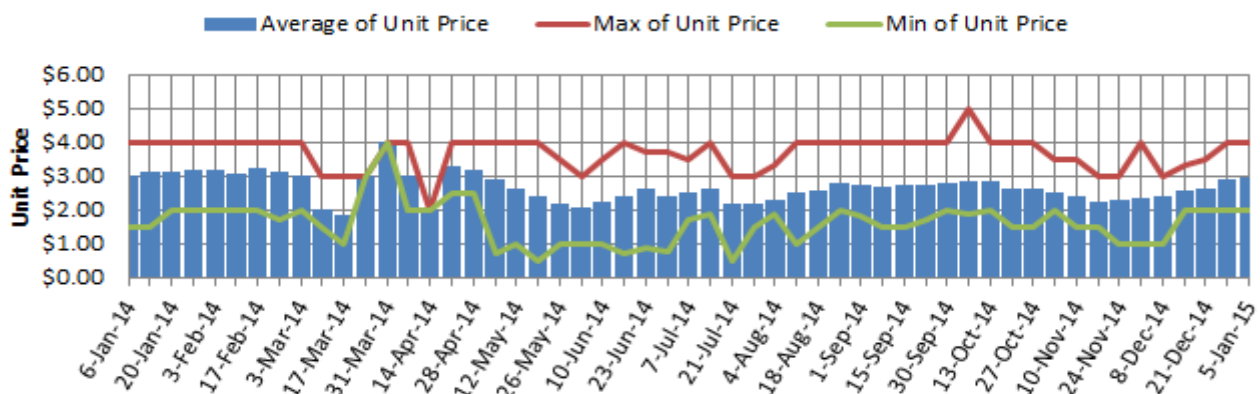
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
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	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total sales	15,677		192	15,869	857			857	1,558						17,235		192	17,427
Total Stock on Hand																		
QLD																		
Total supermarket sales	18,662			18,662	96			96	175						18,837			18,837
Total non supermarket sales	17,712			17,712						314			314	57	17,769			17,769
Total exports																		
Total sales	36,374			36,374	96			96	175	314			314	57	36,606			36,606
Total Stock on Hand	13,074			13,074						46			46	8	13,082			13,082
SA & TAS																		
Total supermarket sales	8,487		900	9,387	192			192	349						8,836		900	9,736
Total non supermarket sales	6,369		89	6,458	540		5	545	991						7,351		98	7,449
Total exports																		
Total sales	14,856		989	15,845	732		5	737	1,340						16,187		998	17,185
Total Stock on Hand	15,285		466	15,751	725		118	843	1,533						16,603		681	17,284
VIC																		
Total supermarket sales	36,121			36,121	384			384	698						36,819			36,819
Total non supermarket sales	21,731		1,212	22,942	1,795		153	1,948	3,542	2			2		24,995		1,490	26,485
Total exports																		
Total sales	57,852		1,212	59,063	2,179		153	2,332	4,240	2			2		61,814		1,490	63,304
Total Stock on Hand	18,155		3,806	21,962	1,054		26	1,080	1,964						20,072		3,854	23,925
WA																		
Total supermarket sales	7,827			7,827	195			195	355						8,182			8,182
Total non supermarket sales	3,456		158	3,614	364			364	662	12			12	2	4,120		158	4,278
Total exports	640			640											640			640
Total sales	11,923		158	12,081	559			559	1,016	12			12	2	12,942		158	13,100
Total Stock on Hand	4,035			4,035	501			501	911	108			108	20	4,966			4,966
Total																		
Total supermarket sales	84,625		900	85,525	1,635			1,635	2,973						87,598		900	88,498
Total non supermarket sales	51,417		1,651	53,068	2,788		158	2,946	5,356	328			328	60	56,546		1,938	58,484
Total exports	640			640											640			640
Total sales	136,682		2,551	139,233	4,423		158	4,581	8,329	328			328	60	144,783		2,838	147,621
Total Stock on Hand	51,553		4,300	55,854	2,323		144	2,467	4,485	154			154	28	55,805		4,562	60,367



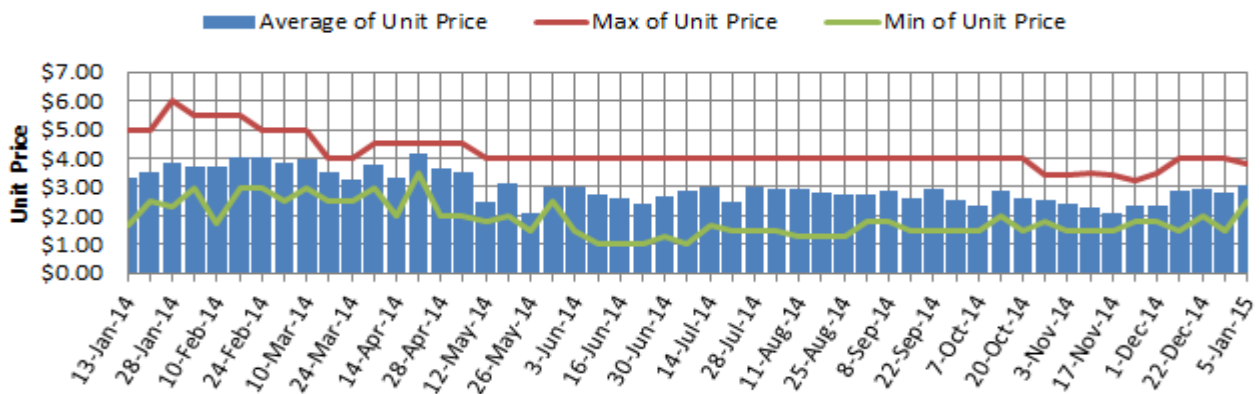
Hass Avocado Average Retail Prices - Sydney



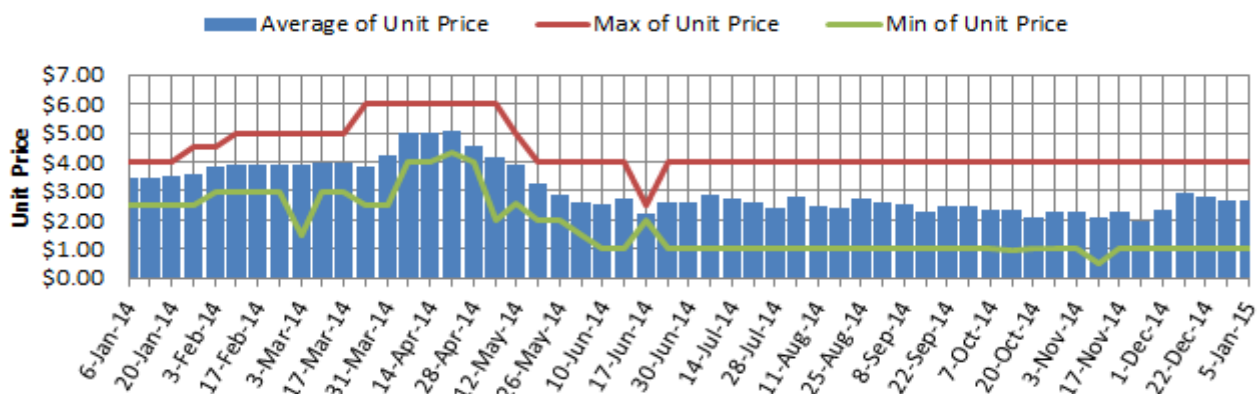
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

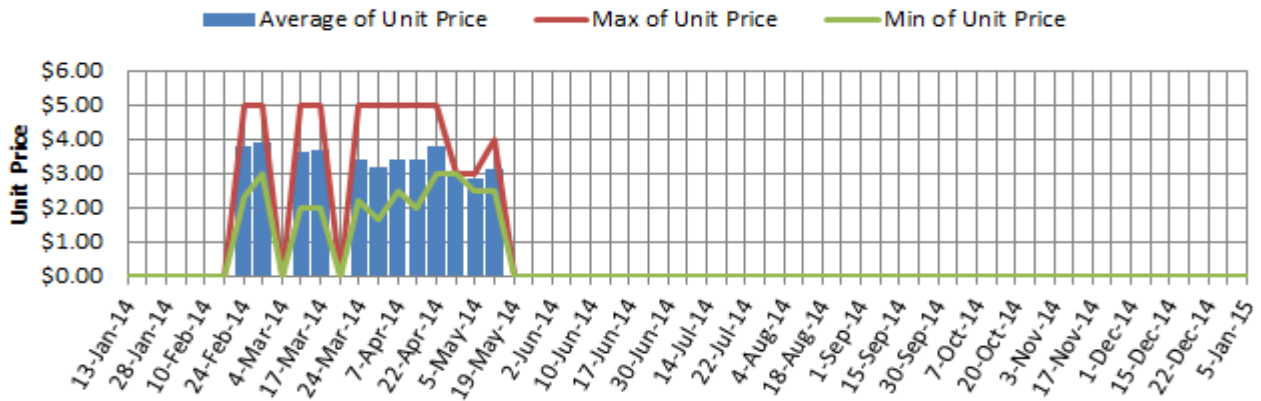


Hass Avocado Average Retail Prices - Perth

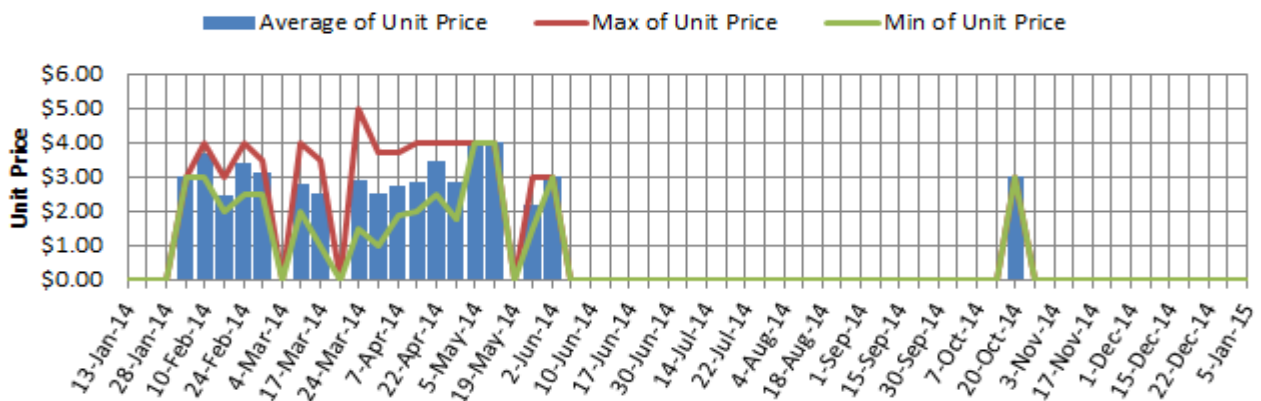


Assessment date (Week Commencing)

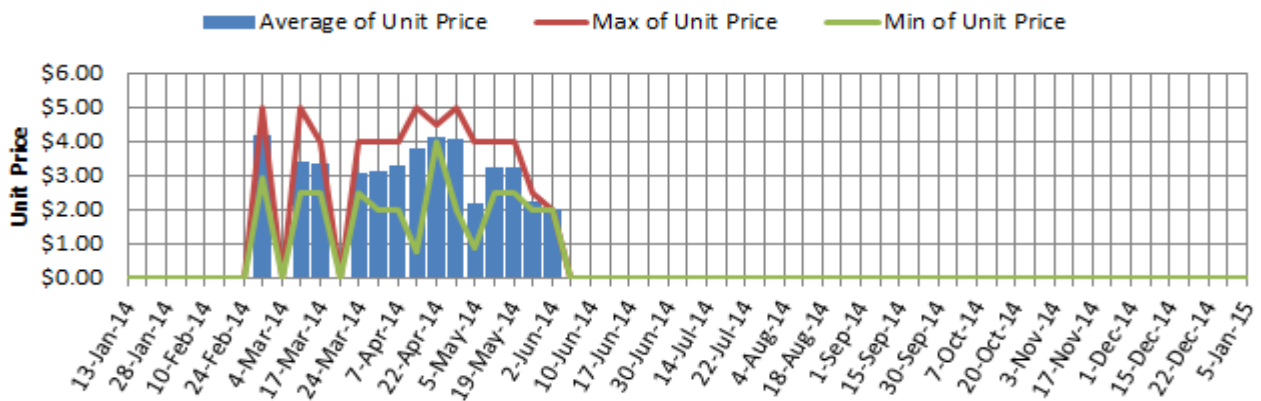
Shepard Avocado Average Retail Prices - Sydney



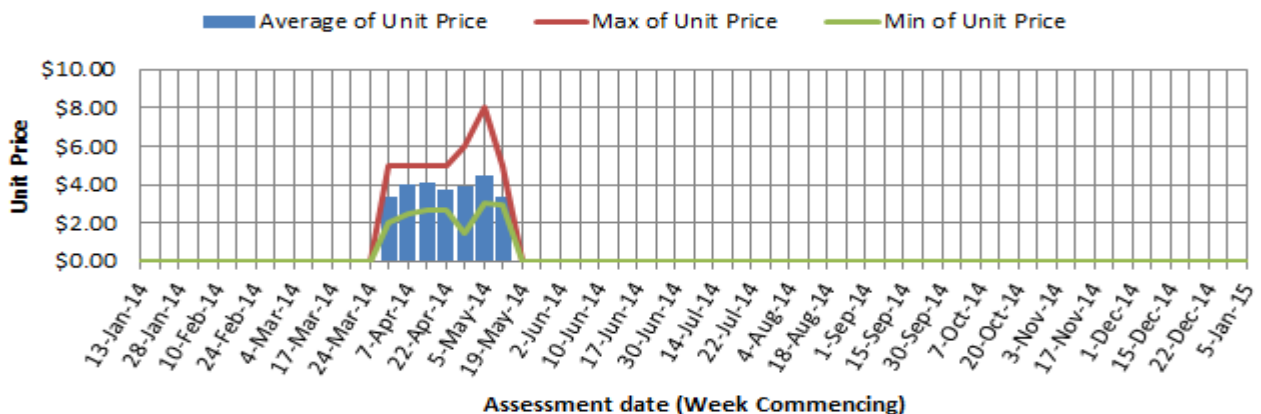
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 5th January 2015

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
Woolworths	Hass	300	\$0.98	Store	Mixed	I	Hass	175	\$2.40	No	NS
Coles	Hass	290	\$2.48	Store	NZ	I	Hass	200	\$2.49	No	NS
Coles	Hass	260	\$2.48	No	NZ	I	Hass	185	\$2.49	No	NS
Coles	Hass	290	\$2.48	No	NZ	Coles	Hass	215	\$2.50	No	Aus
Woolworths	Hass	260	\$2.98	No	Mixed	Coles	Hass	280	\$2.50	No	Aus
IGA	Hass	220	\$2.98	No	NZ	Safeway	Hass	315	\$2.98	No	Aus
Woolworths	Hass	290	\$2.98	No	Mixed	Woolworths	Hass	300	\$2.98	No	Mixed
Foodworks	Hass	290	\$2.99	No	NZ	Woolworths	Hass	290	\$2.98	No	Mixed
IC	Hass	270	\$2.99	No	Aus	I	Hass	190	\$2.99	No	Aus
IC	Hass	270	\$2.99	No	Aus	IGA	Hass	230	\$2.99	No	Aus
I	Hass	270	\$2.99	No	Aus	I	Hass	225	\$2.99	No	NS
IC	Hass	300	\$2.99	No	Aus	I	Hass	310	\$3.48	No	NS
IGA	Hass	280	\$3.49	No	Aus	I	Hass	310	\$3.69	No	Aus
IC	Hass	340	\$3.99	No	Mixed	IC	Hass	300	\$3.79	No	Aus
IC	Hass	350	\$3.99	No	Aus	IC	Hass	300	\$3.79	No	Aus
I	Hass	320	\$3.99	No	Aus	PERTH					
IC	Reed	390	\$3.99	No	Aus	I	Hass	230	\$1.99	Store	Aus
IC	Reed	420	\$3.99	No	Aus	Coles	Hass	185	\$2.00	No	Aus
BRISBANE						Coles	Hass	170	\$2.00	No	Aus
I	Hass	220	\$1.99	No	NZ	Coles	Hass	180	\$2.00	No	Aus
IC	Hass	205	\$1.99	No	NZ	Woolworths	Hass	220	\$2.48	No	Aus
I	Hass	275	\$2.49	No	NZ	Woolworths	Hass	200	\$2.48	Store	Aus
I	Hass	280	\$2.50	Store	NZ	I	Hass	225	\$2.48	No	Aus
IC	Hass	300	\$2.69	No	NZ	Woolworths	Hass	230	\$2.48	No	Aus
Coles	Hass	200	\$2.98	No	NZ	I	Hass	270	\$2.99	Store	Aus
Coles	Hass	240	\$2.98	No	NZ	IGA	Hass	145	\$2.99	No	Aus
Coles	Hass	300	\$2.98	No	NZ	I	Hass	270	\$2.99	No	Aus
IGA	Hass	210	\$2.98	No	NZ	IGA	Hass	270	\$2.99	No	Aus
IGA	Hass	165	\$2.99	No	NZ	I	Hass	245	\$2.99	No	Aus
Woolworths	Hass	180	\$3.28	No	Aus	IGA	Hass	305	\$3.69	No	Aus
Woolworths	Hass	350	\$3.28	No	Aus	I	Hass	260	\$3.99	No	Aus
Woolworths	Hass	295	\$3.28	No	Aus	IGA	Hass	345	\$3.99	No	Aus
I	Hass	316	\$3.29	No	Aus						
Woolworths	Hass	295	\$3.50	No	NZ						
IGA	Hass	308	\$3.99	No	NZ						

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

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

Store Codes

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