



INFOCADO WEEKLY REPORT: 12th — 18th March 2016 (Week 12)

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Comments

- The weekly dispatch volume (202,721 trays) was considerably higher than the week's forecast of 156,484 trays (refer P 2).
- The dispatch and forecast data shows that Shepard fruit from North Queensland is now the dominant fruit in the Australian market. This is supported by last week's online pricing data (refer to P6&7) showing that Woolworths in Brisbane and Sydney are not offering single unit Hass fruit only Shepard.
- **We encourage NQ and CQ packers and consolidators to ensure their forecast data is up-to-date :)**
- NQ and CQ 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 12 originated from North Queensland (96,622 tray eqv.). The Victorian market received the highest volume (60,378 tray eqv.) and the dominant size in the market was size 20 (40,574 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 & WA 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 12 (Wed, 16th Mar —Tues, 22nd Mar).

Marketing Update: What's new in social media

You may have seen that Facebook has rolled out its expanded "like" buttons recently called 'reactions'. It offers Facebook users more options to engage with posts in their newsfeed, with the option to give a 'like', 'love', 'haha', 'wow', 'sad' and 'angry'.



It will be interesting to see the impact these reactions have on the engagement of the Australian Avocados brand pages and Hort Innovation will be testing the pages to see if we can get more 'love' for avocados!!

Upcoming Holidays

Good Friday: 25th March | Easter Monday: 28th March | Anzac Day: 25th April | Labour Day (QLD): 2nd May | Western Australia Day (WA): 6th June |

Report Index

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 12 - 16)

Variety	Trays - Total	Bulk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	5.5Kg Eqv

Week 12 - begin 12/03/2016

Hass	27,704	824		29,202
Shepard	111,000	8,380	5,750	127,281
Week Total	138,704	9,204	5,750	156,484

Week 13 - begin 19/03/2016

Fuerte	1,500	50		1,591
Hass	10,900	148		11,169
Shepard	116,500	11,050	7,700	137,991
Wurtz	4,000	300		4,545
Week Total	132,900	11,548	7,700	155,296

Week 14 - begin 26/03/2016

Fuerte	500	25		545
Hass	100	24		144
Shepard	128,500	11,750	7,000	151,137
Wurtz	3,000	200		3,364
Week Total	132,100	11,999	7,000	155,189

Week 15 - begin 02/04/2016

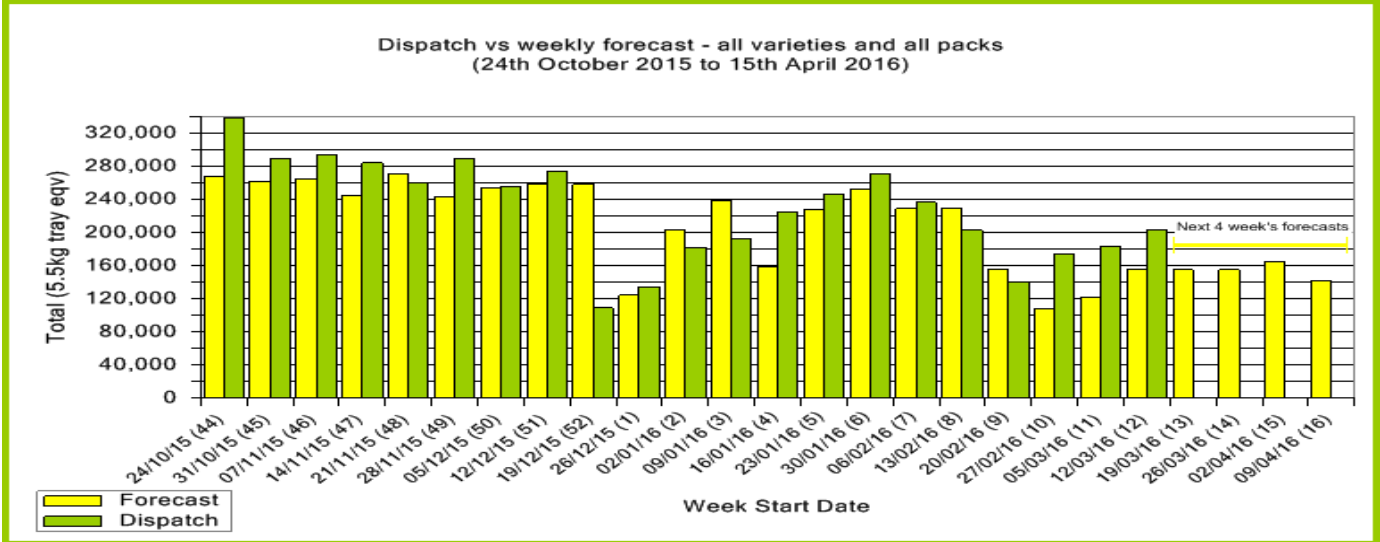
Hass	104	24		148
Shepard	142,500	11,480	7,200	164,682
Week Total	142,604	11,504	7,200	164,829

Week 16 - begin 09/04/2016

Shepard	123,000	9,900	5,200	141,945
Week Total	123,000	9,900	5,200	141,945

Dispatch Data (Week 12 - begin 12/03/2016)

Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Fuerte	2,113	86				2,269
Hass	40,350	3,062	887	7,779		47,492
Shepard	118,719	17,589	2,040	9,388	1,000	152,959
Total	161,182	20,737	2,927	17,167	1,000	202,721



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	271,189	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 : 12th March - 18th March 2016 (Wk 12)

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	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
Central Qld		363	1,957	8,071		7,848	4,697	5,807	3,461	32,204	5,598		1,200		42,600
North Qld	86	1,226	7,949	20,421	1,145	14,809	14,895	12,974	3,550	77,055	9,639	2,040	8,188	1,000	96,622
South Qld		1	215	1,363		1,023	480	472	120	3,674	1,976				7,267
Sunshine Coast		1	26	1,113		2,316	2,386	1,417	640	7,899	462				8,739
WA/NT	2,103	8,122	11,342	9,606		4,159	2,750	1,779	489	40,350	3,062	887	7,779		47,492
Total	2,189	9,713	21,489	40,574	1,145	30,155	25,208	22,449	8,260	161,182	20,737	2,927	17,167	1,000	202,721

Origin of Avocado



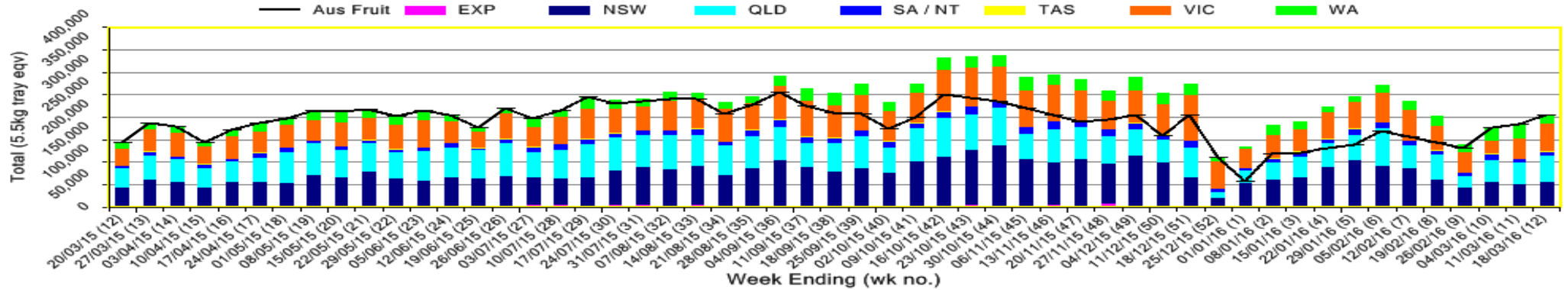
Destination of Avocado



Industry Dispatches By Destination State and Count Size : 12th March - 18th March 2016 (Wk 12)

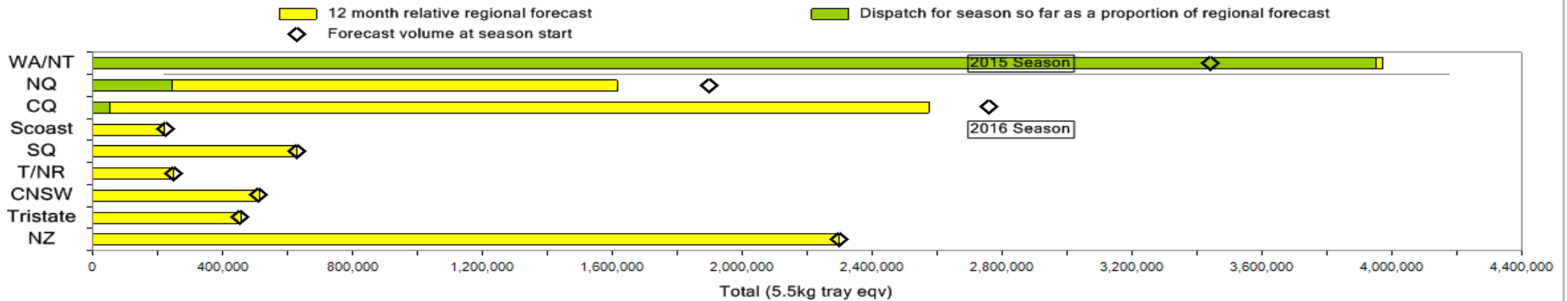
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP	100		41						1,879	2,020	698				3,289
NSW	1,059	3,909	6,666	9,995	254	8,167	5,667	2,608	743	39,068	7,736	175		1,000	53,347
QLD	1	172	2,486	4,554	453	6,825	9,704	14,027	3,900	42,122	8,274	31	6,800		58,408
SA / NT		2	163	2,038		2,284	1,558	742		6,787	772	28			8,196
TAS							640	800		1,440					1,440
VIC	454	3,869	9,852	19,053	438	10,709	6,305	2,636	1,738	55,054	2,485	1,842	2,588		60,378
WA	575	1,761	2,281	4,934		2,170	1,334	1,636		14,691	772	851	7,779		17,664
Total	2,189	9,713	21,489	40,574	1,145	30,155	25,208	22,449	8,260	161,182	20,737	2,927	17,167	1,000	202,721

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2016 to date = 2,391,870 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 12 Contributors - Packhouses

Green Skin Avocados (Consolidator)	Aussie Orchards Growers & Packers Mutchilba (NQ)
Mackays Banana Marketing Co (Consolidator)	Avocados with Altitude (NQ)
Simpson Farms Pty Ltd (Consolidator)	Hilltop Mareeba (NQ)
Sunfresh (Consolidator)	Battistin Orchards Pty Ltd (NQ)
The Avolution (Consolidator)	Gunnado Farm (NQ)
Sunnyspot Packhouse Pty Ltd (CQ)	Avocado Estates (NQ)
SuperPak/Avocado Ridge (CQ)	Tinaroo Falls Avocado Trust (NQ)
Donovan Family Investment Trust (CQ)	Golden Triangle Avocados (NQ)
Sunny Bluff Produce Pty Ltd (CQ)	Advance Packing & Marketing Services P/L (WA)
Cobra Hill Orchards (NQ)	VP & EA Farrell (WA)
Koci Avocado's (NQ)	Delroy Orchards (WA)

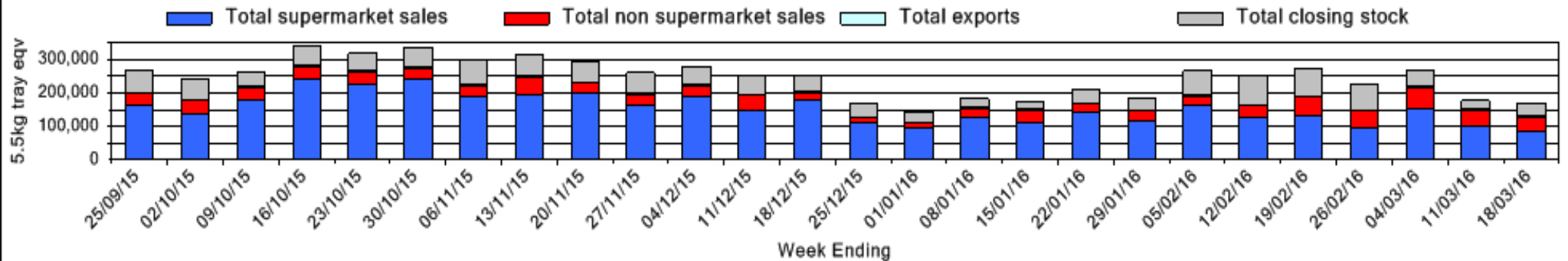
Week 12 Contributors - Wholesalers

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

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	5,164	14,110		19,274		930		930	1,691						5,164	15,801		20,965
Total Stock on Hand																		
QLD																		
Total supermarket sales	3,213	26,202		29,415		886		886	1,611						3,213	27,813		31,026
Total non supermarket sales	2,547	7,875	396	10,818		8		8	15					2,547	7,890	396	10,833	
Total exports		1,444		1,444		462		462	840						2,284		2,284	
Total sales	5,760	35,521	396	41,677		1,356		1,356	2,465					5,760	37,986	396	44,142	
Total Stock on Hand	17,783	3,332		21,115		306		306	556					17,783	3,888		21,671	
SA & TAS																		
Total supermarket sales	2,911	3,960		6,871										2,911	3,960		6,871	
Total non supermarket sales	3,297	1,654	561	5,512	81	433		514	935					3,444	2,441	561	6,447	
Total exports																		
Total sales	6,208	5,614	561	12,383	81	433		514	935					6,355	6,401	561	13,318	
Total Stock on Hand	3,313	3,428	224	6,965	114	56		170	309					3,520	3,530	224	7,274	
VIC																		
Total supermarket sales	6,864	19,907		26,771	58	192		250	455					6,969	20,256		27,226	
Total non supermarket sales	6,641	3,227	320	10,188	1,090	705	220	2,015	3,664					8,623	4,509	720	13,852	
Total exports																		
Total sales	13,505	23,134	320	36,959	1,148	897	220	2,265	4,118					15,592	24,765	720	41,077	
Total Stock on Hand	1,614	3,133		4,747	112	61		173	315					1,818	3,244		5,062	
WA	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total supermarket sales	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total non supermarket sales	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total exports	Full data set not displayed because not enough WA wholesalers contributed data this week																	
Total sales	11,155			11,155	604			604	1,098					12,253				12,253
Total Stock on Hand																		
Total																		
Total supermarket sales	24,238	57,929		82,167	253	1,270		1,523	2,769					24,698	60,238		84,936	
Total non supermarket sales	16,978	19,006	1,277	37,261	1,344	1,884	220	3,448	6,269					19,422	22,431	1,677	43,530	
Total exports	576	1,444		2,020	236	462		698	1,269					1,005	2,284		3,289	
Total sales	41,792	78,379	1,277	121,448	1,833	3,616	220	5,669	10,307					45,125	84,954	1,677	131,755	
Total Stock on Hand	23,702	12,375	224	36,301	226	672		898	1,633					24,113	13,597	224	37,934	

Weekly National Sales



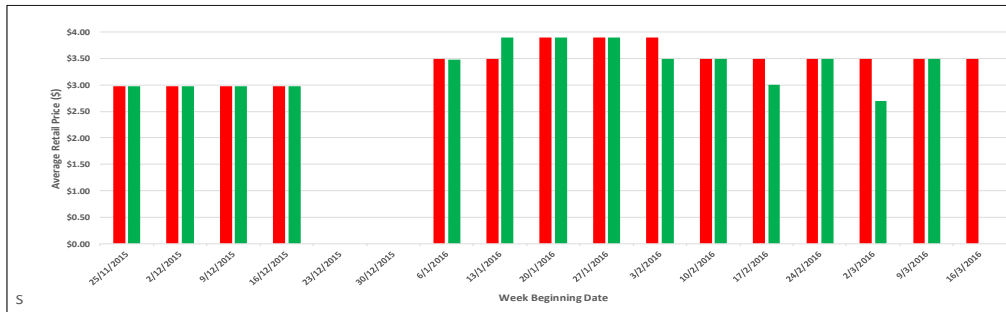
Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 16th March 2016 (Week 12)

Key: ■ Coles online ■ Woolworths online

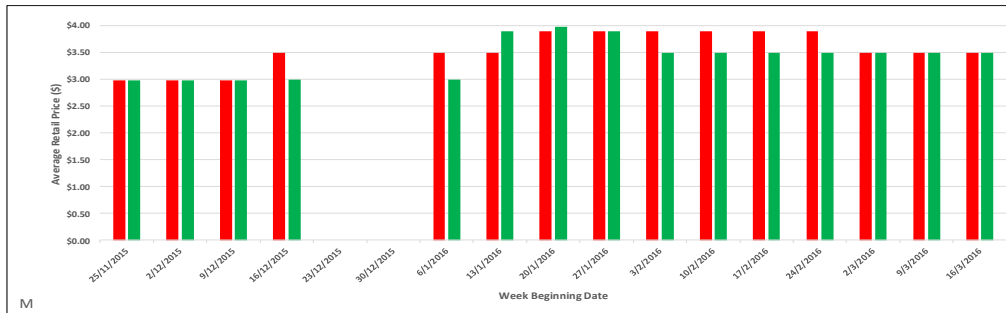
Brisbane



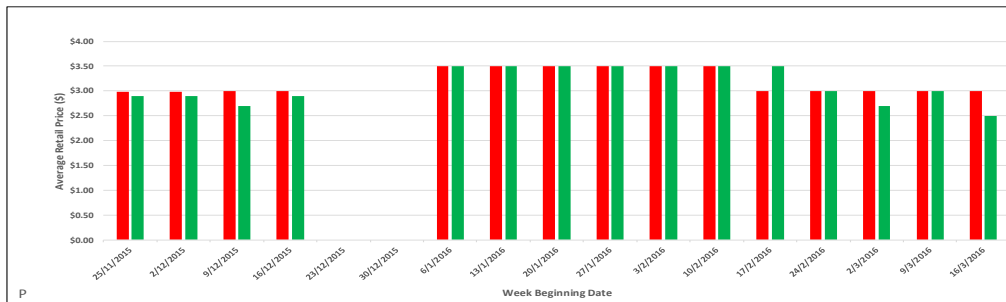
Sydney



Melbourne



Perth



Single Fruit, Multi-buy and Pack Pricing for Week Beginning - Wed, 16th March 2016 (Week 12)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	Single Fruit		\$3.00	\$3.50	\$3.50	\$3.00
	Hass	Multi-buy	2 for \$x	-	-	-	-
	Shepard	Single Fruit		\$3.00	-	-	-
	Shepard	Multi-buy	2 for \$x	2 for \$4.50*	-	-	-
	Hass	Single Fruit	Organic	-	\$5.50	-	-
	Hass	3 Pack		\$6.50	-	-	-
Woolworths	Hass	Single Fruit		-	-	\$3.50	↓\$2.50
	Hass	Multi-buy	2 for \$x	-	-	-	-
	Shepard	Single Fruit		↑\$3.00	\$3.50	\$3.50	-
	Shepard	Multi-buy	2 for \$x	-	-	-	-
	Hass	Single Fruit	Organic	\$5.50	\$5.50	-	-
	Hass	2 Pack	Ripe	\$7.90	-	-	-
	Hass	2 Pack	Organic	-	-	\$9.98	\$11.98
	Hass	3 Pack		\$5.98	\$5.98	\$6.98	\$7.00
	Hass	4 Pack	Mini Ripe	\$7.98	-	-	-
	Hass	5 Pack	Mini Disney	\$4.98	\$5.98	\$4.98	\$7.00
	Hass	1kg Bag	Odd Bunch	-	↓\$7.50	\$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 - No catalogue offers found