



INFOCADO WEEKLY REPORT: 28th March — 3rd April 2015 (Week 14)

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Comments

- The majority of dispatches for the past week were spread evenly across Brisbane, Sydney and Melbourne, size 20 to 28 dominating (refer P 2).
- The weekly dispatch volume (178,108 trays) was higher than the weeks forecast by approx. 45,000 5.5kg tray eqv.(34%). The four week forecast indicates similar levels of supply throughout April (refer P 3).
- A range of varieties are currently flowing through markets with Shepard dominating volumes and Hass expected to increase mid to late April (refer P 3).
- Retail price surveys only recorded Hass in a few stores in Melbourne and Perth.
- Average retail price per Shepard avocado has eased slightly to around \$2.50 to \$3.50 / avocado. Some discounting is evident in Brisbane (refer P 6 - 8).

Australian Avocado Evolution A Winner

As part of the Australian Avocado Chef Masterclasses targeting the next generation of chefs, a unique training session was held at the Evolution Hospitality Institute in Sydney at the beginning of March. Twenty two students were put through their paces in hands-on instructional sessions. The classes taught students a broad understanding of the versatility of fresh Australian avocados. Many of the dishes prepared were served later in the evening to 60 invited hospitality industry guests in the Institute's dining room that evening.

All participating cooking students were challenged to create a special avocado dish for the event ensuring they pushed the boundaries of their understanding and potential of the fruit - with the winning dish being served as the entrée. In addition to the honour and accolade, the winner received an Australian Avocados engraved Tojiro knife as a prize.

For a full brief please refer to the Guacamole Enewsletter - 23/3/2015.

Upcoming Holidays

Anzac Day: 25th April | Anzac Day WA: 27th April | Queen's Birthday NZ & Western Australia Day: 1st June | Queen's Birthday NSW, QLD, SA & VIC: 8th 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

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.

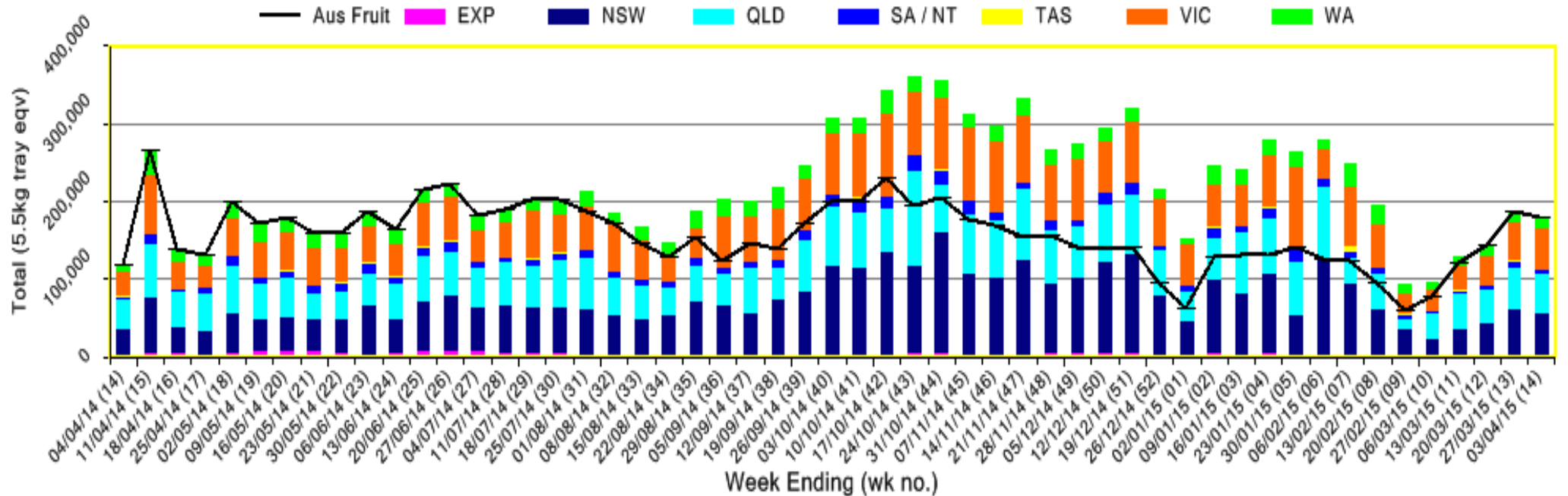
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This project has been funded by Horticulture Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

Industry Dispatches By Destination State and Count Size : 28th March - 3rd April 2015 (Wk 14)

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			10							1,240	192			1,589
NSW	312	408	5,714	9,470	682	8,782	8,405	3,826	1,647	39,246	7,896	6,087		54,709
QLD	185	362	3,164	5,006	900	4,236	10,008	15,143	2,682	41,686	4,316	2,935	5,970	51,152
SA / NT	49	1	74	144		2,807	663	799	110	4,647	56	1,051		4,940
TAS							456	160		616				616
VIC	294	1,432	6,052	11,827	682	6,476	5,720	2,537	512	35,532	8,339	4,022		51,425
WA			703	1,534		868	5,647	4,050	2	12,804	480			13,677
Total	840	2,203	15,717	27,981	2,264	23,169	30,899	26,515	6,183	135,771	21,279	14,095	5,970	178,108

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2015 to date = 2,739,961 5.5kg tray eqv

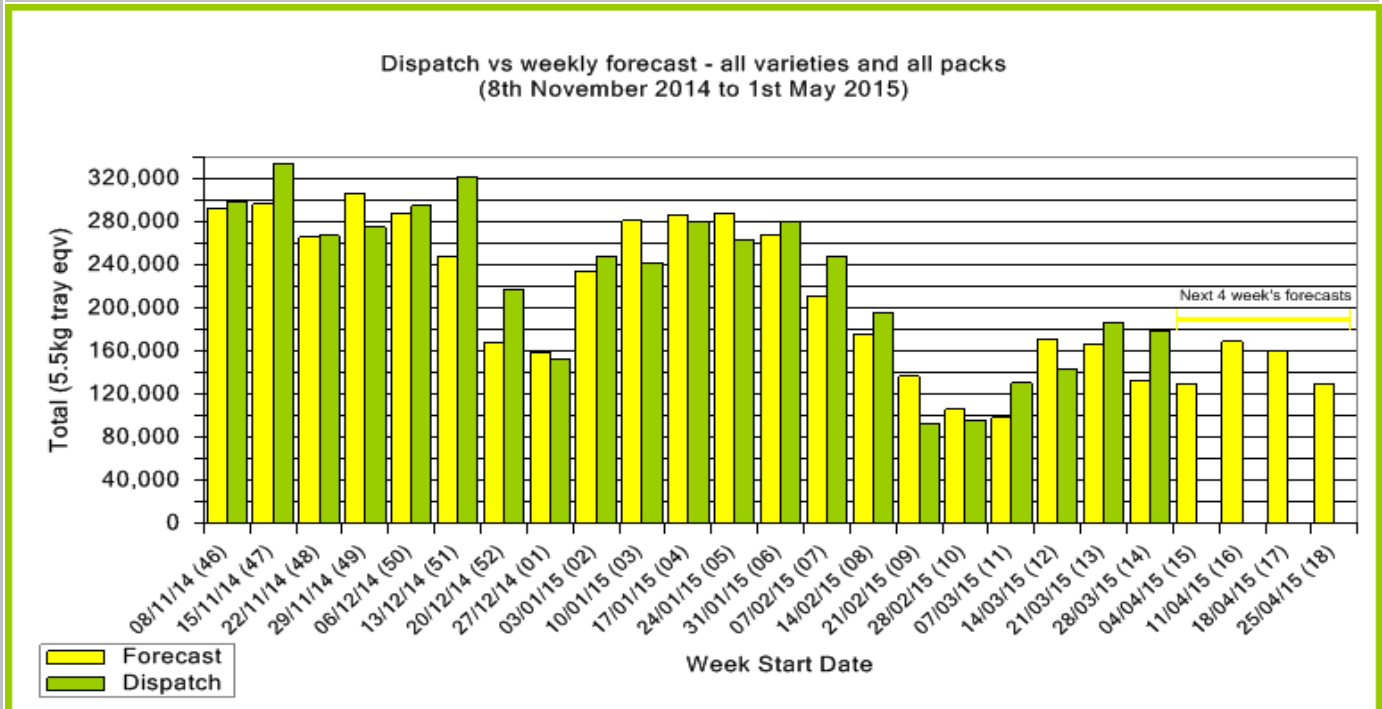


Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 14 - 18)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 14 - begin 28/03/2015					
Fuerte	1,000				1,000
Hass	494	94			665
Shepard	112,300	9,860	2,400	1,500	130,936
Wurtz	500				500
Week Total	114,294	9,954	2,400	1,500	133,101
Week 15 - begin 04/04/2015					
Hass	2,500	100			2,682
Shepard	113,000	7,390	2,400	1,500	127,145
Week Total	115,500	7,490	2,400	1,500	129,827
Week 16 - begin 11/04/2015					
Hass	31,050	1,920	1,000	2,000	35,087
Sharwil	50	40			123
Shepard	117,000	8,800	1,400	2,700	133,746
Wurtz	500	5			509
Week Total	148,600	10,765	2,400	4,700	169,464
Week 17 - begin 18/04/2015					
Hass	54,500	2,800	1,000	2,000	60,137
Sharwil	50	40			123
Shepard	86,000	7,800	300		100,237
Wurtz	500	5			509
Week Total	141,050	10,645	1,300	2,000	161,005
Week 18 - begin 25/04/2015					
Hass	80,800	4,800	1,000	2,000	90,073
Shepard	36,000	2,000	300		39,691
Week Total	116,800	6,800	1,300	2,000	129,764

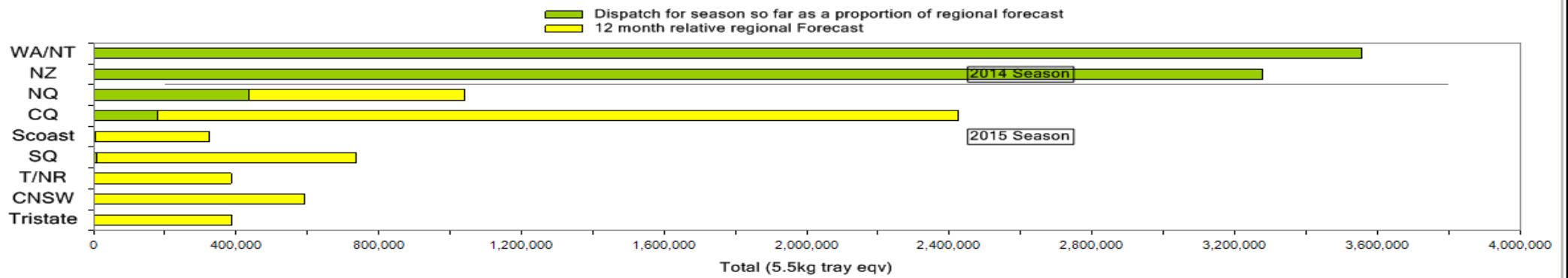
Dispatch Data (Week 14 - begin 28/03/2015)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Fuerte	3,331	15			3,358
Hass	40	23			82
Other	2,304	672			3,526
Pinkerton	1,767	17			1,798
Shepard	125,475	20,472	14,095	5,970	166,345
Wurtz	2,854	80			2,999
Total	135,771	21,279	14,095	5,970	178,108



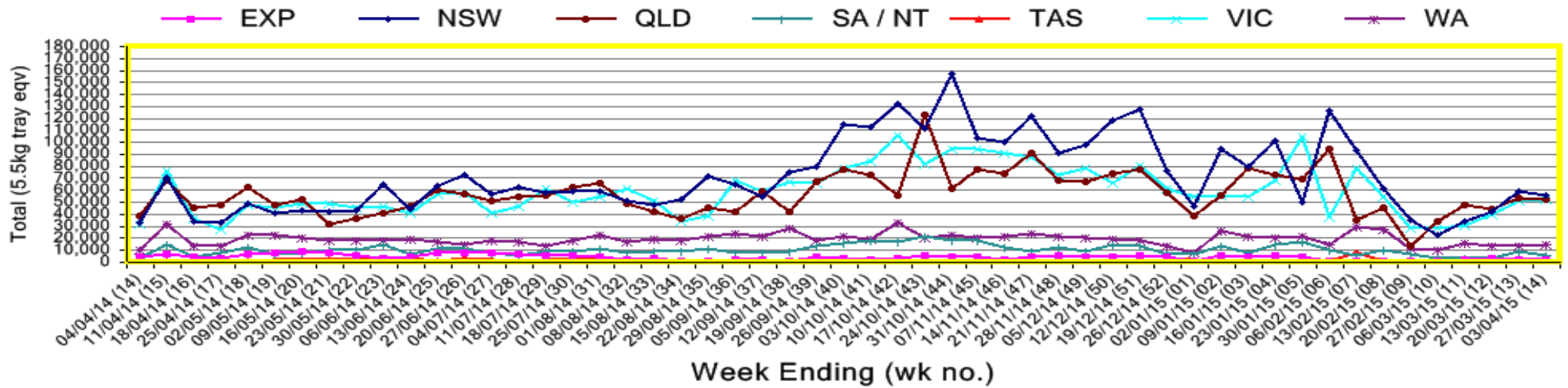
New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015										
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	443,740	379,760	393,210	557,554	624,024	50,280	0	2,806,420
Australia (from Infocado)	123,747	293,918	653,001	561,186	596,008	597,827	417,130	33,605		3,276,422
USA¹	6	12,687	103,015	245,195	150,504	0	33	0		511,440
Japan¹	1,916	12,999	41,077	63,301	31,631	49,680	8,280	0		208,884
Other Asia¹	7,609	43,179	85,640	71,813	77,550	69,707	34,452	9,177		399,127
Total	133,278	362,783	882,733	941,495	855,693	717,214	459,895	42,782		4,395,873

1 Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port. 3

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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 2,739,961 5.5kg tray eqv



Week 14 Contributors - Packhouses

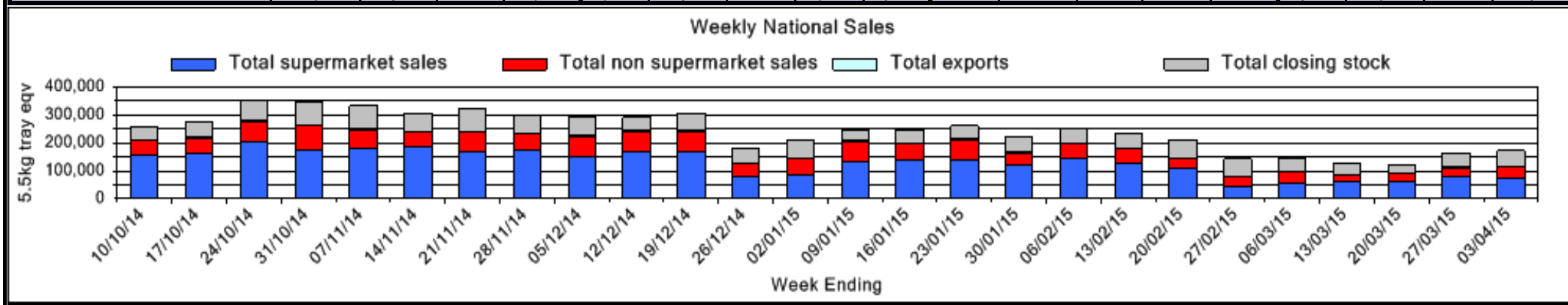
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|--------------------------------------|--|
| Natures Fruit Company (Consolidator) | Battistin Orchards Pty Ltd (NQ) |
| One Harvest (Consolidator) | Gunnado Farm (NQ) |
| Simpson Farms Pty Ltd (Consolidator) | Avocado Estates (NQ) |
| Sunfresh (Consolidator) | Hilltop Mareeba (NQ) |
| The Avolution (Consolidator) | Avocados with Altitude (NQ) |
| SuperPak/Avocado Ridge (CQ) | Cobra Hill Orchards (NQ) |
| Donovan Family Investment Trust (CQ) | Aussie Orchards Growers & Packers (NQ) |
| Sunny Bluff Produce Pty Ltd (CQ) | Tropicado Avocados (NQ) |
| Golden Triangle Avocados (NQ) | CNSW: Less than 3 contributors |
| R & M Waterman (NQ) | WA: Less than 3 contributors |
| Tinaroo Falls Avocado Trust (NQ) | |

Week 14 Contributors - Wholesalers

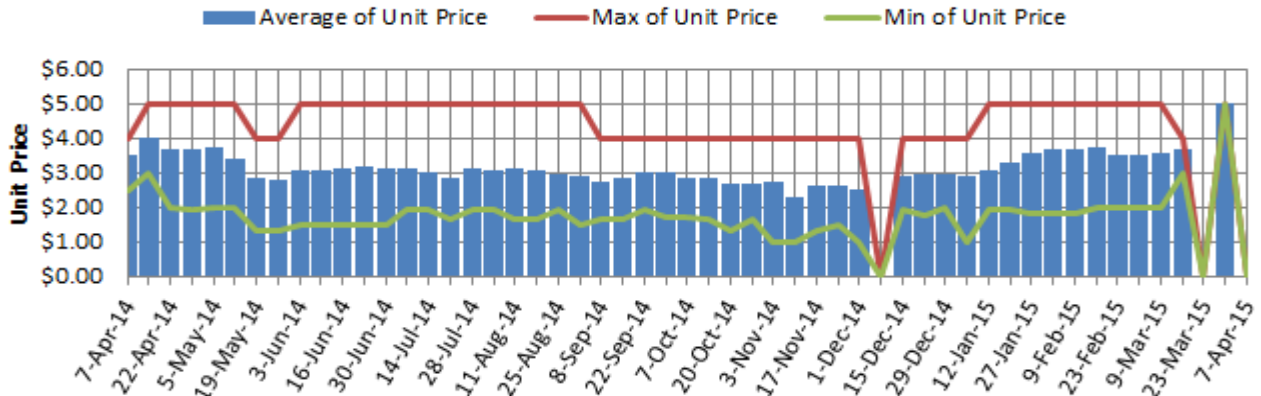
- | | |
|---|---|
| Allcrops Pty Ltd (Sydney) | Fresh Choice WA Pty Ltd (Perth) |
| C & S Ponte Produce Pty Ltd (Melbourne) | Murray Bros (Brisbane) |
| Costa Farms (Adelaide) | Sinclair & Antico (Aust) Pty Ltd (Sydney) |
| Costa Farms (Brisbane) | The La Manna Group (Adelaide) |
| Costa Farms (Melbourne)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

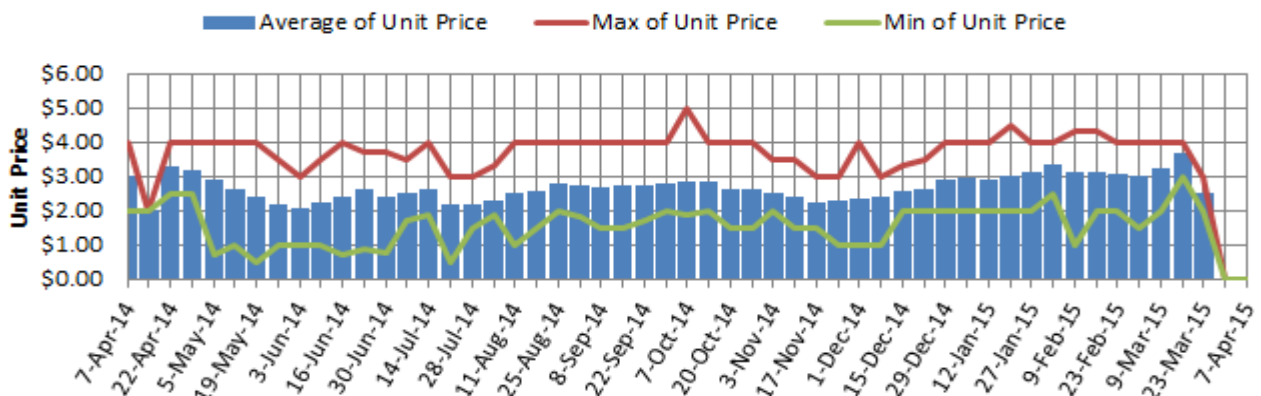
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)				
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	
NSW																			
Total supermarket sales		18,401		18,401							5,760			5,760	1,047		19,448		19,448
Total non supermarket sales	2,821	2,986	107	5,914	9	329		338	615						2,837	3,584	107	6,529	
Total exports																			
Total sales	2,821	21,387	107	24,315	9	329		338	615		5,760			5,760	1,047	2,837	23,032	107	25,977
Total Stock on Hand	288	3,699		3,987		383		383	696						288	4,395		4,683	
QLD																			
Total supermarket sales	436	20,012		20,448		1,248		1,248	2,269		2,880			2,880	524	436	22,805		23,241
Total non supermarket sales	867	4,756		5,623	826	491		1,317	2,395						2,369	5,649		8,018	
Total exports		1,240		1,240		192		192	349							1,589		1,589	
Total sales	1,303	26,008		27,311	826	1,931		2,757	5,013		2,880			2,880	524	2,805	30,043		32,847
Total Stock on Hand	1,655	28,373		30,028	889	912		1,801	3,275						3,271	30,031		33,303	
SA & TAS																			
Total supermarket sales		9,854		9,854		32		32	58		960			960	175		10,087		10,087
Total non supermarket sales	288	6,588	27	6,903	9	1,094		1,103	2,005						304	8,577	27	8,908	
Total exports																			
Total sales	288	16,442	27	16,757	9	1,126		1,135	2,064		960			960	175	304	18,664	27	18,995
Total Stock on Hand	5	5,428		5,433	133	744		877	1,595						247	6,781		7,028	
VIC																			
Total supermarket sales		13,736		13,736							960			960	175		13,911		13,911
Total non supermarket sales	5,007	4,334	41	9,383	243	541		784	1,425						5,449	5,318	41	10,808	
Total exports																			
Total sales	5,007	18,070	41	23,119	243	541		784	1,425		960			960	175	5,449	19,229	41	24,719
Total Stock on Hand	3,705	2,453		6,158	917	663		1,580	2,873						5,372	3,658		9,030	
WA																			
Total supermarket sales	190	9,563		9,753	64			64	116						306	9,563		9,869	
Total non supermarket sales	1,243	367		1,610	797			797	1,449						2,692	367		3,059	
Total exports																			
Total sales	1,433	9,930		11,363	861			861	1,565						2,998	9,930		12,928	
Total Stock on Hand	1,787	750		2,537	60			60	109						1,896	750		2,646	
Total																			
Total supermarket sales	626	71,566		72,192	64	1,280		1,344	2,444		10,560			10,560	1,920	742	75,813		76,556
Total non supermarket sales	10,226	19,031	175	29,433	1,884	2,455		4,339	7,889						13,652	23,495	175	37,322	
Total exports		1,240		1,240		192		192	349							1,589		1,589	
Total sales	10,852	91,837	175	102,865	1,948	3,927		5,875	10,682		10,560			1,920	14,394	100,897	175	115,467	
Total Stock on Hand	7,440	40,703		48,143	1,999	2,702		4,701	8,547						11,074	45,616		56,690	



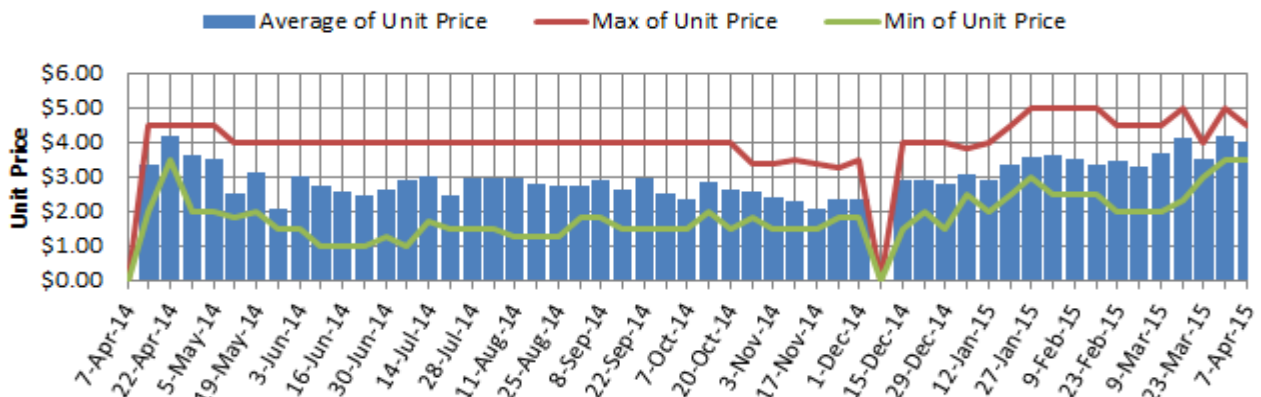
Hass Avocado Average Retail Prices - Sydney



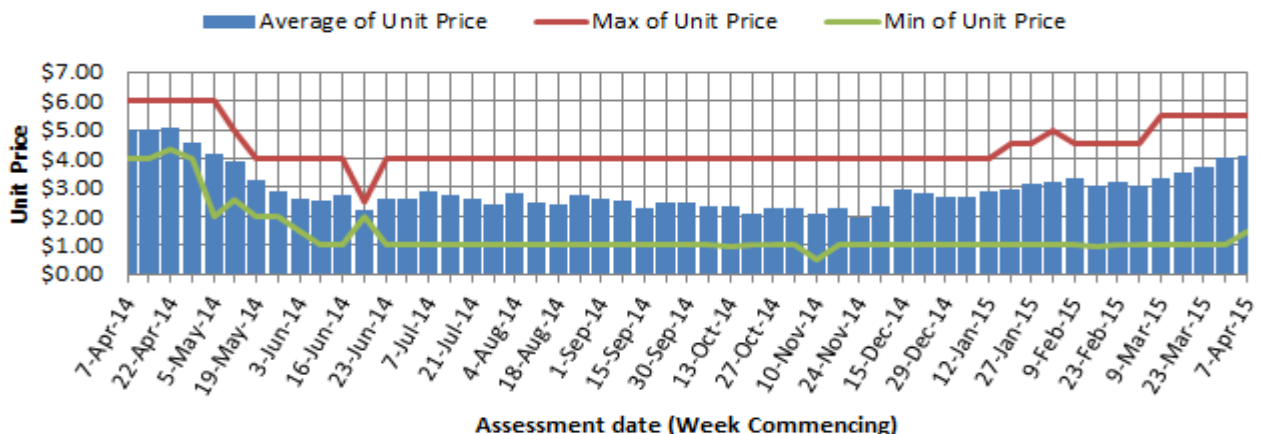
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

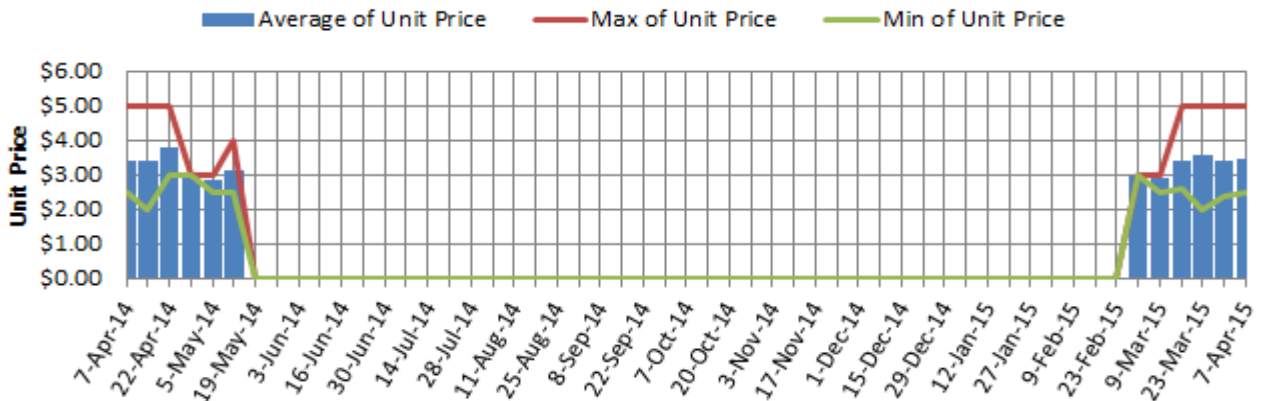


Hass Avocado Average Retail Prices - Perth

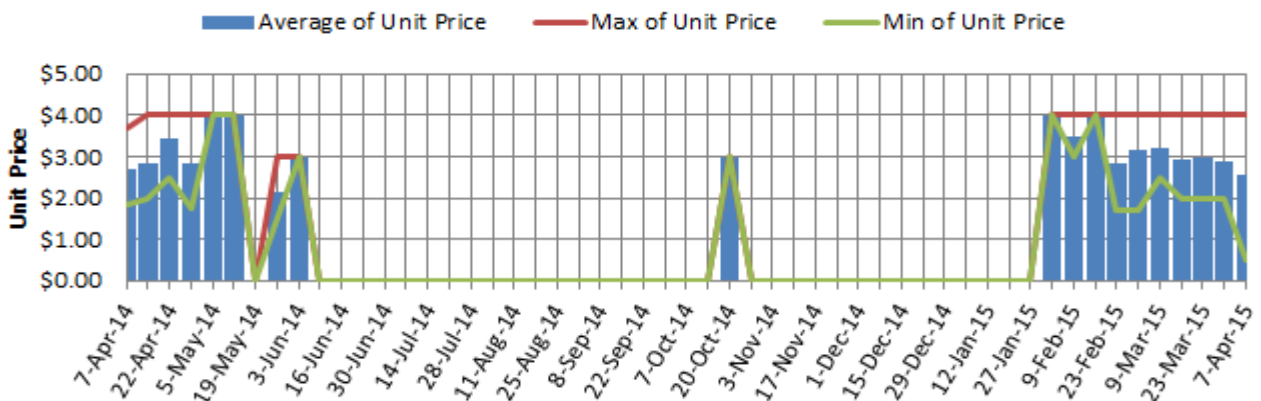


Assessment date (Week Commencing)

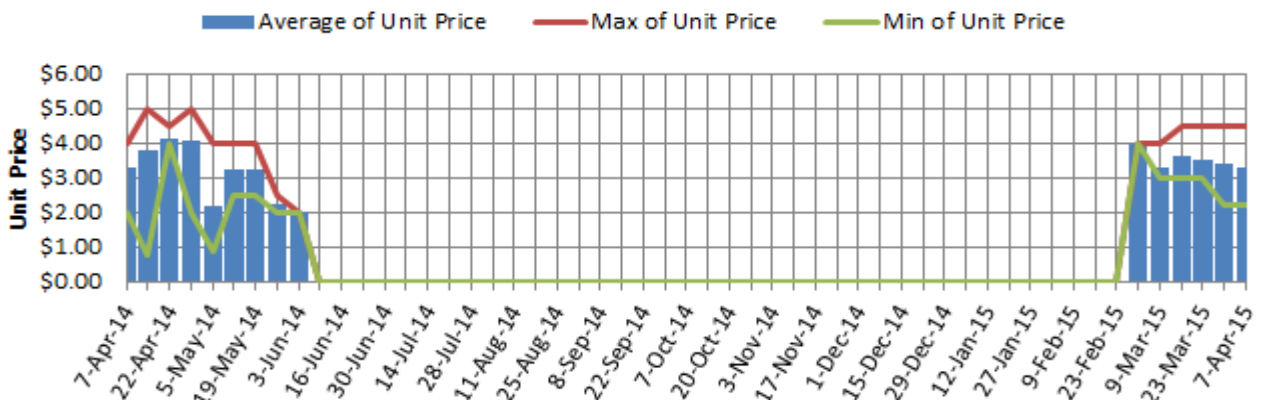
Shepard Avocado Average Retail Prices - Sydney



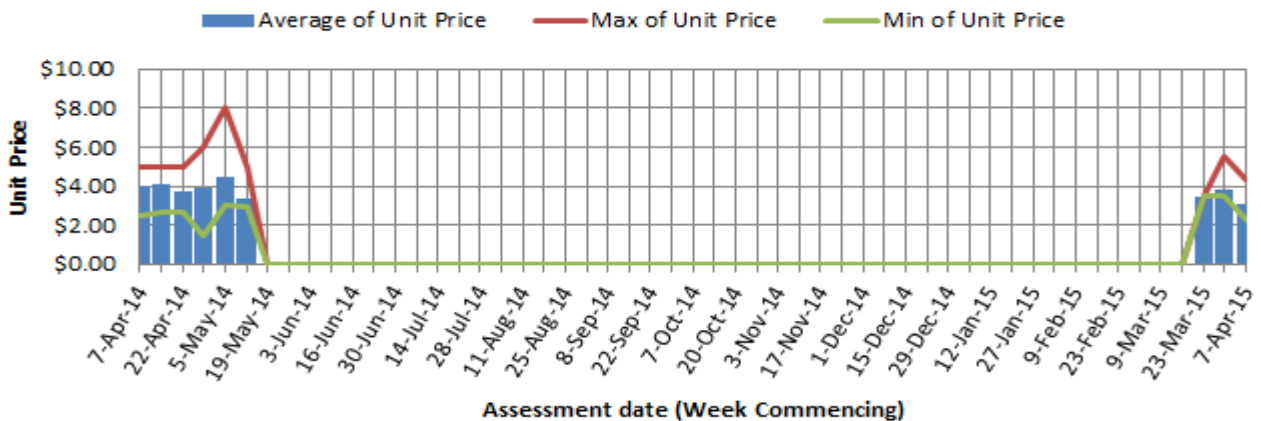
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 7th April 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	Shepard	290	2.50	No	Aus	Woolworths	Shepard	345	2.48	Store	Aus
Coles	Shepard	220	2.98	No	Aus	Woolworths	Shepard	300	2.48	Store	Aus
Coles	Shepard	210	2.98	No	Aus	Woolworths	Shepard	280	2.48	No	Aus
Coles	Shepard	260	2.98	No	Aus	I	Shepard	180	2.49	No	NS
IGA	Shepard	215	3.25	Store	Aus	Coles	Shepard	220	2.98	No	Aus
Woolworths	Shepard	290	3.48	No	Aus	Coles	Shepard	200	2.98	Store	Aus
Woolworths	Shepard	300	3.48	No	Aus	Coles	Shepard	210	2.98	Store	Aus
I	Shepard	270	3.49	No	Aus	I	Shepard	240	3.49	No	Aus
IGA	Shepard	280	3.95	No	Aus	I	Hass	185	3.50	No	Aus
I	Shepard	260	3.99	No	Aus	I	Shepard	290	3.98	No	Aus
Foodworks	Shepard	280	3.99	No	Aus	IS	Shepard	280	3.99	No	Aus
I	Shepard	260	3.99	No	Aus	I	Shepard	340	3.99	No	Aus
I	Shepard	300	3.99	No	Aus	I	Shepard	265	3.99	No	Aus
I	Shepard	290	3.99	No	Aus	I	Shepard	315	3.99	No	Aus
I	Shepard	300	3.99	No	Aus	IGA	Shepard	230	4.49	No	Aus
I	Shepard	300	4.99	No	Aus	PERTH					
BRISBANE						Woolworths	Shepard	170	2.28	Cat	Aus
I	Shepard	150	0.48	Store	Aus	Woolworths	Shepard	185	2.28	Cat	Aus
I	Shepard	150	0.99	Store	Aus	Woolworths	Shepard	175	2.28	Cat	Aus
I	Shepard	200	1.98	No	Aus	Woolworths	Shepard	190	2.49	No	Aus
Woolworths	Shepard	200	1.98	Cat	Aus	Coles	Shepard	210	2.98	No	Aus
Woolworths	Shepard	290	1.98	Cat	Aus	I	Shepard	165	2.98	No	Aus
I	Shepard	280	1.99	No	Aus	Coles	Shepard	165	2.98	No	Aus
IGA	Shepard	180	1.99	No	Aus	I	Hass	215	3.98	No	Aus
I	Shepard	230	2.79	No	Aus	I	Hass	225	3.99	No	Aus
Coles	Shepard	150	2.98	No	Aus	I	Hass	260	3.99	No	Aus
Coles	Shepard	200	2.98	No	Aus	IGA	Hass	215	3.99	No	Aus
Coles	Shepard	200	2.98	No	Aus	IS	Shepard	250	3.99	No	Aus
I	Shepard	260	2.99	No	Aus	I	Shepard	220	3.99	No	Aus
IGA	Shepard	270	3.99	No	Aus	IGA	Hass	260	4.19	No	Aus
I	Shepard	340	3.99	No	Aus	IGA	Shepard	190	4.29	No	Aus
I	Shepard	270	3.99	No	Aus	I	Hass	265	5.49	No	Aus
						IGA	Hass	345	5.49	No	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