



INFOCADO WEEKLY REPORT: 26th March—1st April 2016 (Week 14)

Horticulture
Innovation
Australia

Comments

- The weekly dispatch volume (157,682 trays) was slightly lower than the week's forecast of 161,154 trays (refer P 2).
- Shepard fruit continue to dominate the market, with no recorded dispatches of Hass last week. This is supported by last week's online pricing data (refer to P6&7) showing that Woolworths and Coles in Brisbane, Sydney & Melbourne and Woolworths in Perth are not providing an online offering of Hass fruit, only Shepard.
- The largest volume of dispatches in week 14 originated from North Queensland (79,045 tray eqv.). The Queensland market received the highest volume (51,545 tray eqv.) and the dominant size in the market was size 20 (28,326 tray eqv.) (refer P 3).
- 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 14 (Wed, 30th Mar —Tues, 5th April). These prices are sourced from online retailer shopping sites and online catalogues.
- **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).**

[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](#)

Marketing Update: New television advertising campaign

Australian Avocados' new television advertising campaign on Sunday 10 April. The advertisements will run for three weeks, finishing on 30 April and is expected to reach almost 7 million people on the free to air channels. Subscription reach will be available once the advertising schedule has been finalised for the period.

Upcoming Holidays

Anzac Day: 25th April | Labour Day (QLD): 2nd May | Western Australia Day (WA): 6th June | Queen's Birthday (VIC, NSW & SA): 13th June |

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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 14 - 18)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv

Week 14 - begin 26/03/2016					
Fuerte	100	10			118
Shepard	132,000	13,400	200	7,000	157,673
Wurtz	3,000	200			3,364
Week Total	135,100	13,610	200	7,000	161,154

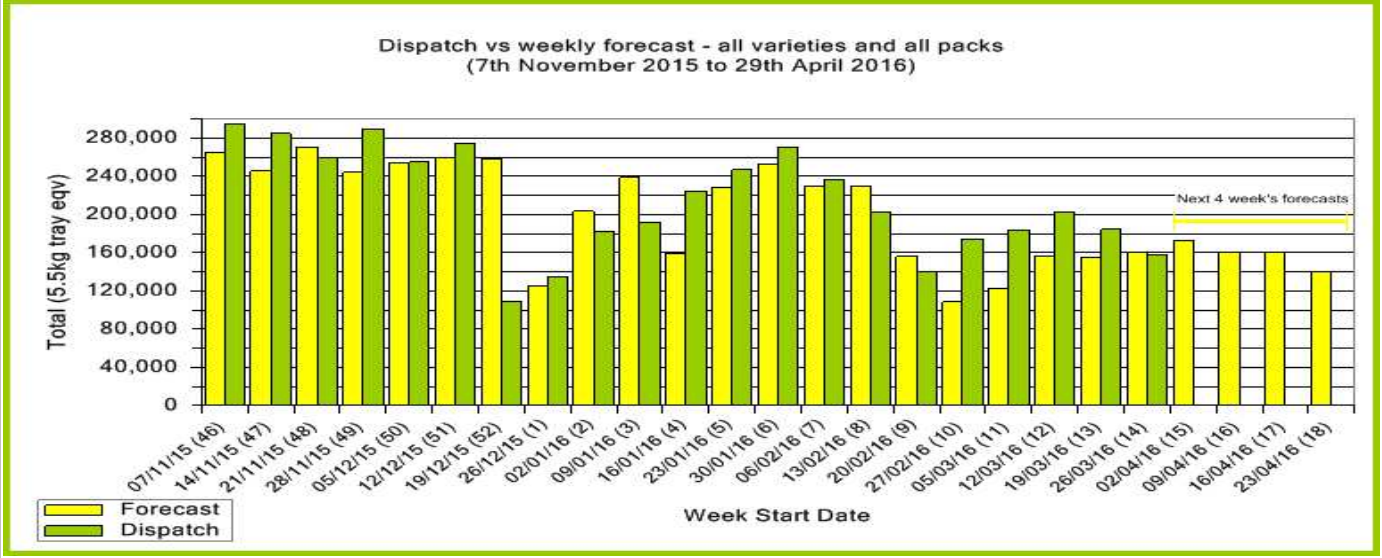
Week 15 - begin 02/04/2016					
Hass	4,180	564			5,205
Shepard	149,000	9,250	2,880	6,000	167,433
Wurtz	600	25			645
Week Total	153,780	9,839	2,880	6,000	173,284

Week 16 - begin 09/04/2016					
Hass	4,000	500			4,909
Shepard	137,500	9,200	2,000	6,000	155,682
Week Total	141,500	9,700	2,000	6,000	160,591

Week 17 - begin 16/04/2016					
Hass	14,000	1,000			15,818
Shepard	127,500	8,400	2,000	6,000	144,228
Week Total	141,500	9,400	2,000	6,000	160,046

Week 18 - begin 23/04/2016					
Hass	24,000	1,500			26,727
Shepard	103,000	5,600	2,000	1,000	113,728
Week Total	127,000	7,100	2,000	1,000	140,455

Dispatch Data (Week 14 - begin 26/03/2016)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Pinkerton	710	21			748
Shepard	121,217	17,534	5,642	5,677	155,155
Wurtz	1,646	73			1,779
Total	123,573	17,628	5,642	5,677	157,682



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	254,434	0	2,097,044
Australia (from ABS)	27,589	107,037	232,868	444,023	373,317	526,550	426,445	TBA **	TBA**	2,137,829
USA³	0	0	0	0	0	0	0	0	0	0
Japan³	0	0	4,212	20,473	26,484	9,286	1,089	8	0	61,551
Other Asia³	973	6,951	28,265	61,567	63,798	52,651	38,817	19,235	7,463	279,719
Total Dispatch (Infocado 2 + 3)	17,698	87,518	223,817	502,457	414,637	450,503	460,545	273,676	7,463	2,438,314

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 : 26th March - 1st April 2016 (Wk 14)

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	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
Central Qld		1,085	3,036	10,152		8,610	7,913	9,493	2,219	42,508	5,408	768		52,481
North Qld	375	707	6,160	14,464	1,324	12,238	11,882	11,286	2,091	60,527	9,130	4,874	5,677	79,045
South Qld			708	1,584	171	957	3,200	1,720	402	8,742	2,676			13,607
Sunshine Coast		13	149	2,126		2,829	2,480	2,987	1,212	11,796	414			12,549
	375	1,805	10,053	28,326	1,495	24,634	25,475	25,486	5,924	123,573	17,628	5,642	5,677	157,682

Origin of Avocado



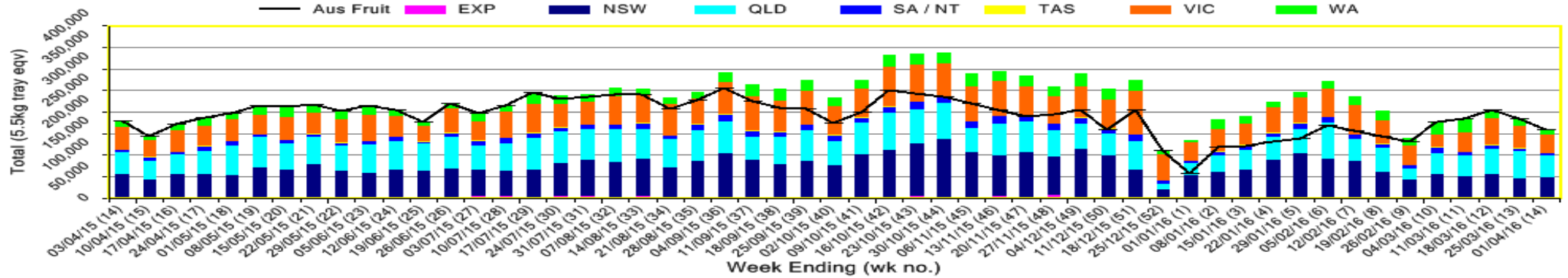
Destination of Avocado



Industry Dispatches By Destination State and Count Size : 26th March - 1st April 2016 (Wk 14)

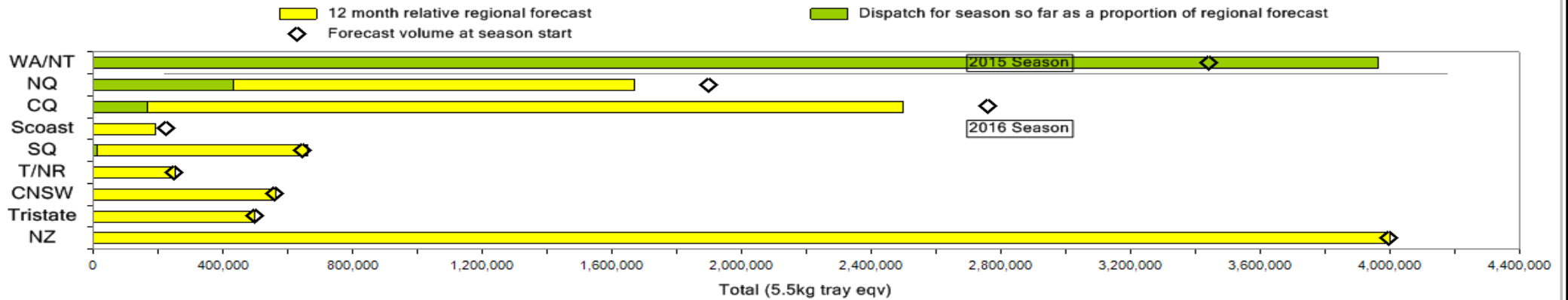
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
EXP			50						2,147	2,197	405			2,933
NSW	375	882	3,674	11,856	481	8,316	5,758	3,620	995	35,957	5,172	842		45,514
QLD		262	3,096	4,615	70	6,331	7,183	12,229	2,425	36,211	7,866		5,677	51,545
SA / NT		7	11	318		1,328	940	1,136		3,740	96			3,915
TAS							480	640		1,120				1,120
VIC		654	2,887	10,566	944	7,859	7,234	3,261	357	33,762	3,726	4,800		41,410
WA			335	971		800	3,880	4,600		10,586	363			11,246
Total	375	1,805	10,053	28,326	1,495	24,634	25,475	25,486	5,924	123,573	17,628	5,642	5,677	157,682

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2016 to date = 2,733,909 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 14 Contributors - Packhouses

Green Skin Avocados (Consolidator)	Hilltop Mareeba (NQ)
Mackays Banana Marketing Co (Consolidator)	Avocado Estates (NQ)
Simpson Farms Pty Ltd (Consolidator)	Koci Avocado's (NQ)
Sunfresh (Consolidator)	Tinaroo Falls Avocado Trust (NQ)
The Avolution (Consolidator)	Avocados with Altitude (NQ)
Sunnyspot Packhouse Pty Ltd (CQ)	Battistin Orchards Pty Ltd (NQ)
SuperPak/Avocado Ridge (CQ)	Gunnado Farm (NQ)
Donovan Family Investment Trust (CQ)	Aussie Orchards Growers & Packers Mutchilba (NQ)
Sunny Bluff Produce Pty Ltd (CQ)	Golden Triangle Avocados (NQ)
SuperPak/Avocado Ridge (CQ)	SQ: Less than 3 contributors

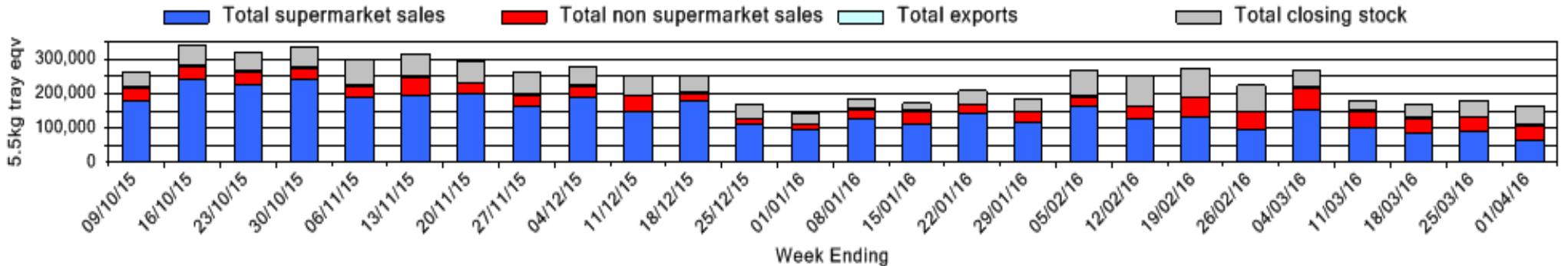
Week 14 Contributors - Wholesalers

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

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		17,290		17,290		901		901	1,638		768		768	140		19,068		19,068
Total Stock on Hand																		
QLD																		
Total supermarket sales	4,095	19,086		23,181		1,056		1,056	1,920						4,095	21,006		25,101
Total non supermarket sales		8,464		8,464		143		143	260							8,724		8,724
Total exports		2,197		2,197		405		405	736							2,933		2,933
Total sales	4,095	29,747		33,842		1,604		1,604	2,916					4,095	32,663		36,758	
Total Stock on Hand	23,573	4,827	16	28,416		925	8	933	1,696					23,573	6,509	31	30,112	
SA & TAS																		
Total supermarket sales	960	5,269		6,229										960	5,269		6,229	
Total non supermarket sales	744	3,712	612	5,068	270	391	8	669	1,216					1,235	4,423	627	6,284	
Total exports																		
Total sales	1,704	8,981	612	11,297	270	391	8	669	1,216					2,195	9,692	627	12,513	
Total Stock on Hand	1,710	3,113	975	5,798	738	783		1,521	2,765					3,052	4,537	975	8,563	
VIC																		
Total supermarket sales		17,096		17,096		480		480	873						17,969		17,969	
Total non supermarket sales	3,775	3,514	4,009	11,298	335	970	110	1,415	2,573					4,384	5,278	4,209	13,871	
Total exports																		
Total sales	3,775	20,610	4,009	28,394	335	1,450	110	1,895	3,445					4,384	23,246	4,209	31,839	
Total Stock on Hand	3,611	4,287	2,177	10,075	1	262	27	290	527					3,613	4,763	2,226	10,602	
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	2,853	6,145	437	9,435	202	64		266	484					3,220	6,261	437	9,919	
Total Stock on Hand																		
Total																		
Total supermarket sales	5,367	58,124		63,491	49	1,536		1,585	2,882		768		768	140	5,456	61,056		b
Total non supermarket sales	7,060	22,452	5,058	34,570	758	2,469	118	3,345	6,082						8,438	26,941	5,273	40,652
Total exports		2,197		2,197		405		405	736							2,933		2,933
Total sales	12,427	82,773	5,058	100,258	807	4,410	118	5,335	9,700		768		768	140	13,894	90,931	5,273	110,098
Total Stock on Hand	30,063	15,480	3,168	48,711	739	2,150	35	2,924	5,316					31,407	19,389	3,232	54,027	

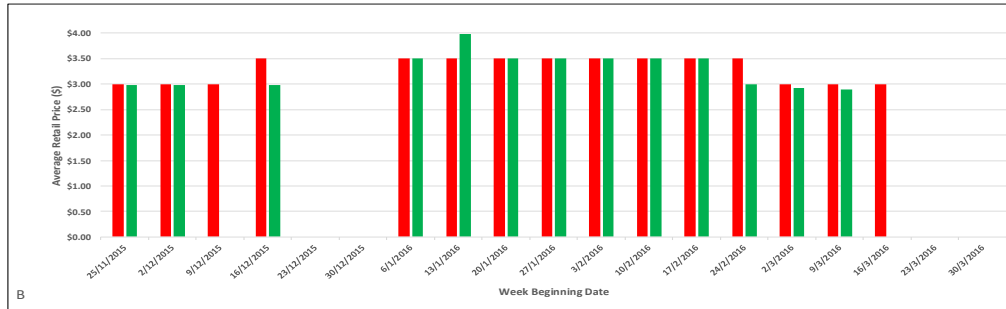
Weekly National Sales



Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 30th March 2016 (Week 14)

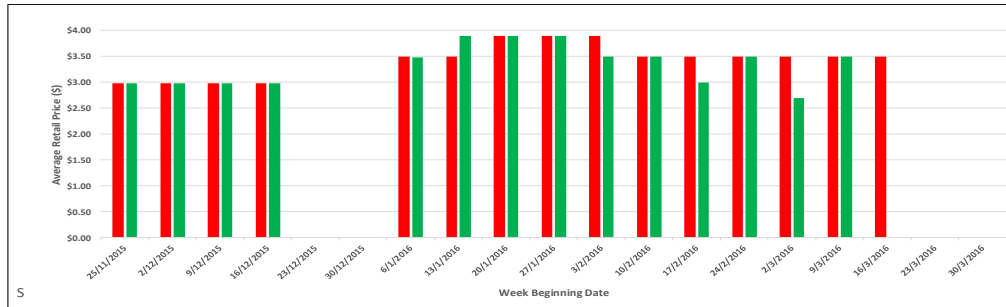
Key: ■ Coles online ■ Woolworths online

Brisbane

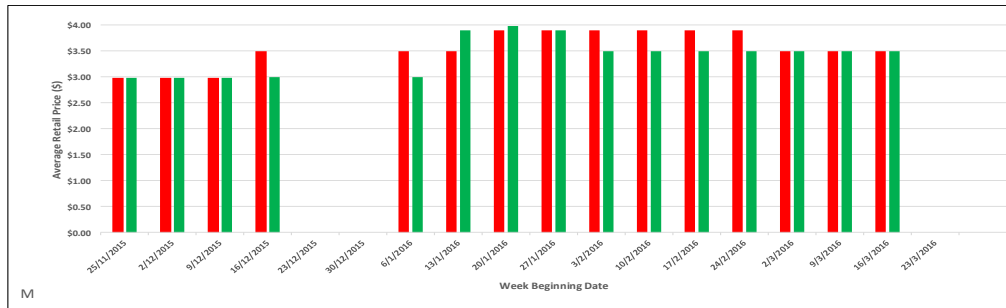


Please note: Brisbane, Sydney & Melbourne: There is no online pricing published for single Hass fruit in these markets this week, only Shepard – please see online pricing for single Shepard fruit in each market on the next page'

Sydney



Melbourne



Perth



Single Fruit, Multi-buy and Pack Pricing for Week Beginning — Wed, 30th March 2016 (Week 14)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	Single Fruit		-	-	-	\$3.00
	Hass	Multi-buy	2 for \$x	-	-	-	-
	Shepard	Single Fruit		-	↑\$3.50	-	-
	Shepard	Multi-buy	2 for \$x	-	-	-	-
	Hass	Single Fruit	Organic	-	-	-	-
	Hass	3 Pack		-	-	-	-
Woolworths	Hass	Single Fruit		-	-	-	-
	Hass	Multi-buy	2 for \$x	-	-	-	-
	Shepard	Single Fruit		↑\$3.00	↑\$3.50	↑\$3.50	\$3.00
	Shepard	Multi-buy	2 for \$x	-	↑2 for \$6*	-	-
	Hass	Single Fruit	Organic	\$5.50	\$5.50	-	-
	Hass	2 Pack	Ripe	\$7.90	-	\$7.98	-
	Hass	2 Pack	Organic	-	-	-	-
	Hass	3 Pack		\$5.98	\$4.98	↓\$5.98	\$7.00
	Hass	4 Pack	Mini Ripe	-	-	-	-
	Hass	5 Pack	Mini Disney	\$5.90	\$5.98	\$5.48	\$7.00
	Hass	1kg Bag	Odd Bunch	↑\$7.50	\$7.50	\$8.98	\$9.50

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

Woolworths - Sydney - Hass - 3 pack from NZ - \$5.98