



INFOCADO WEEKLY REPORT: 5th April — 11th April 2014 (Wk 15)



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Comments

- Perth consumers have seen another week of high retail prices with the retail price peaking at \$5.99 / fruit. Whilst prices across the other major cities have held steady.
- Hass volumes in the marketplace have started to rise with majority coming from the northern Aust. growing regions. This volume is expected to rise when viewing the forecasts, page 3, though at the moment there are still comparable volumes of Shepard.
- The weekly dispatches have jumped a considerable amount this week. A factor contributing to this variance can probably be related to people harvesting more than expected in northern parts of Qld prior to Cyclone Ita. With some of these pack houses not contributing to Infocado on a regular basis, these sudden market influxes are felt more readily.
- With the last of the fruit arriving in from NZ and CNSW more volumes are expected for the northern growing regions to supply the Aust. marketplace. As it can be seen from the graph at the top of page 4, fruit is starting to emerge from the SC and SQ growing regions.

What you need to be aware of for next month

New Look Australian Avocado Website

The launch of the new television campaign later this month is also an ideal opportunity to launch a refresh of the Australian Avocados website. From week commencing 27 April the consumer website will feature new device response technology and design changes will provide improved page navigation and search functionality from any mobile or desk top device. With over 15,000 unique visitors a month these changes are aimed at providing a better overall user experience for consumers.

More detailed information about the marketing campaign will appear in the next issue of Talking Avocados magazine (see the Marketing Update section).

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

IMPORTANT and PLEASE NOTE:

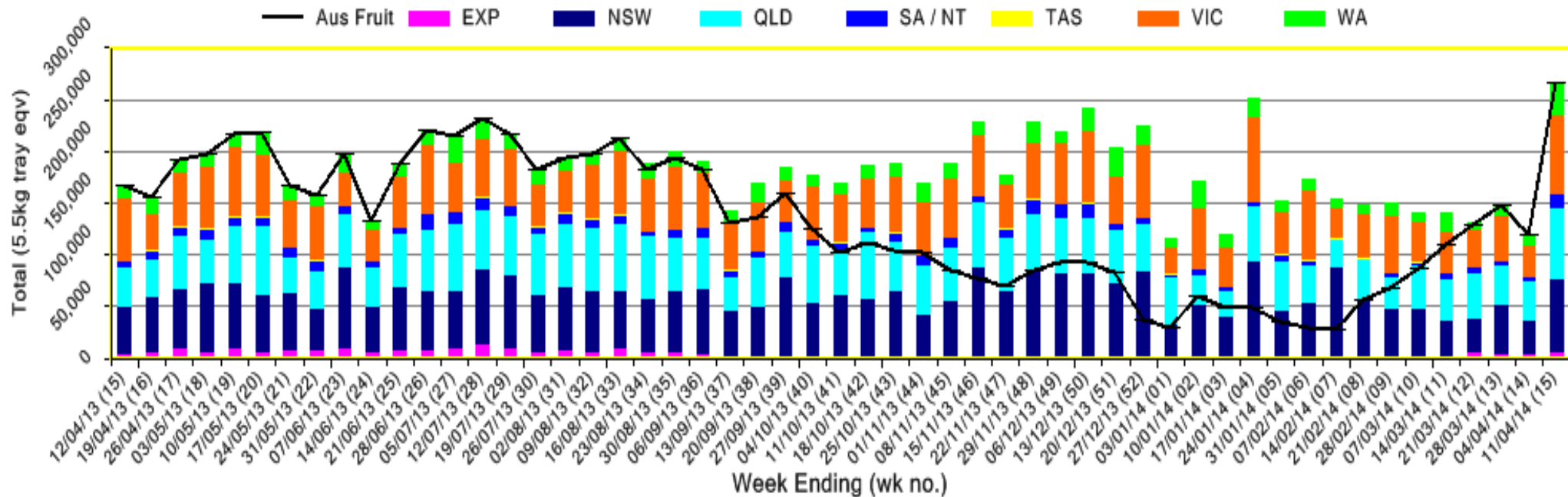
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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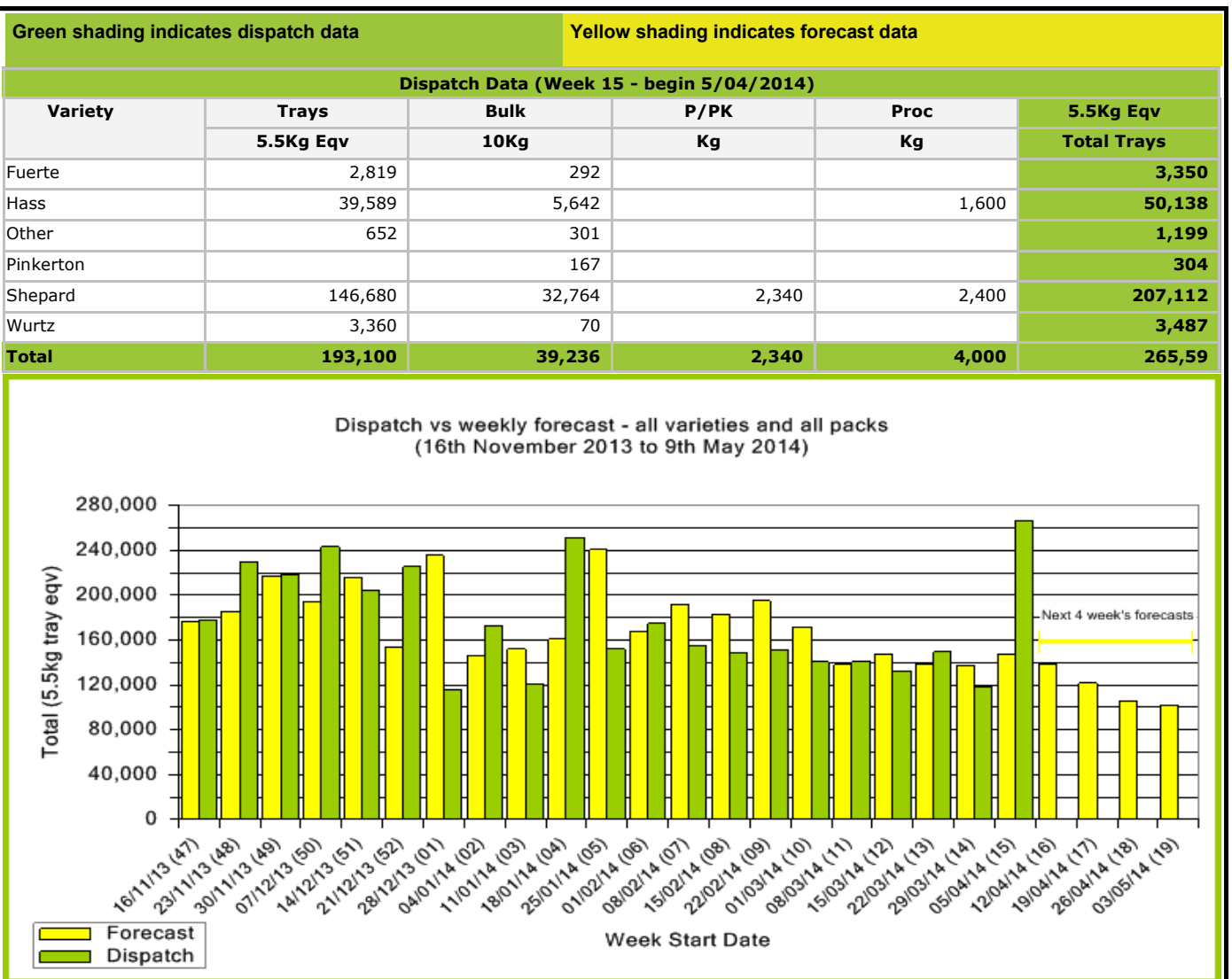
Industry Dispatches By Destination State and Count Size : 5th April - 11th April 2014 (Wk 15)

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									5,190	5,190	672			6,412
NSW	2	1,844	7,470	15,235	2,488	12,510	7,027	2,906	3,095	52,577	9,551	480		70,029
QLD		600	5,439	6,902	1,821	4,704	10,209	11,049	2,244	42,968	13,233	600	4,000	67,864
SA / NT		8	1,639	2,849		971	2,048	4,736	140	12,391	877	360		14,051
TAS								320		320				320
VIC	49	1,845	6,569	14,603	3,164	11,887	13,285	3,009	2,137	56,548	10,189	900		75,237
WA			386	3,321		3,472	11,824	3,130	973	23,106	4,714			31,677
Total	51	4,297	21,503	42,910	7,473	33,544	44,393	25,150	13,779	193,100	39,236	2,340	4,000	265,590

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2014 to date = 2,387,857 5.5kg tray eqv



Forecast Data (Week 15 - 19)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 15 - begin 05/04/2014					
Fuerte	500	50			591
Hass	52,535	4,040	8,640	1,200	61,669
Shepard	70,800	4,780	15,000	1,000	82,400
Wurtz	2,500	250			2,955
Week Total	126,335	9,120	23,640	2,200	147,615
Week 16 - begin 12/04/2014					
Hass	75,250	6,500	10,000	2,700	89,377
Sharwil	37	25			82
Shepard	45,500	1,950			49,045
Week Total	120,787	8,475	10,000	2,700	138,505
Week 17 - begin 19/04/2014					
Hass	76,800	6,100	10,000	2,200	90,109
Sharwil	49	30			104
Shepard	29,000	1,250			31,273
Week Total	105,849	7,380	10,000	2,200	121,485
Week 18 - begin 26/04/2014					
Hass	81,500	5,500	5,000	2,400	92,845
Sharwil	49	30			104
Shepard	11,000	1,000			12,818
Week Total	92,549	6,530	5,000	2,400	105,767
Week 19 - begin 03/05/2014					
Hass	84,500	5,800		2,400	95,481
Sharwil	68	40			141
Shepard	5,000	500			5,909
Week Total	89,568	6,340		2,400	101,531

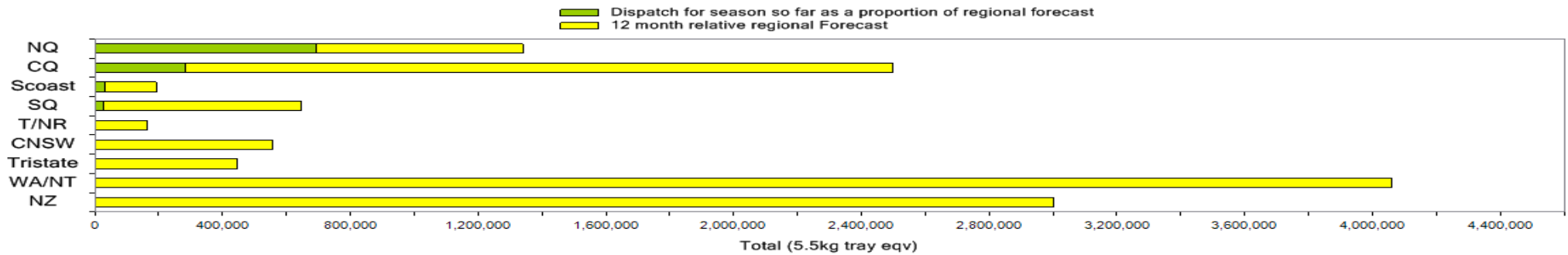


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2013-April 2014

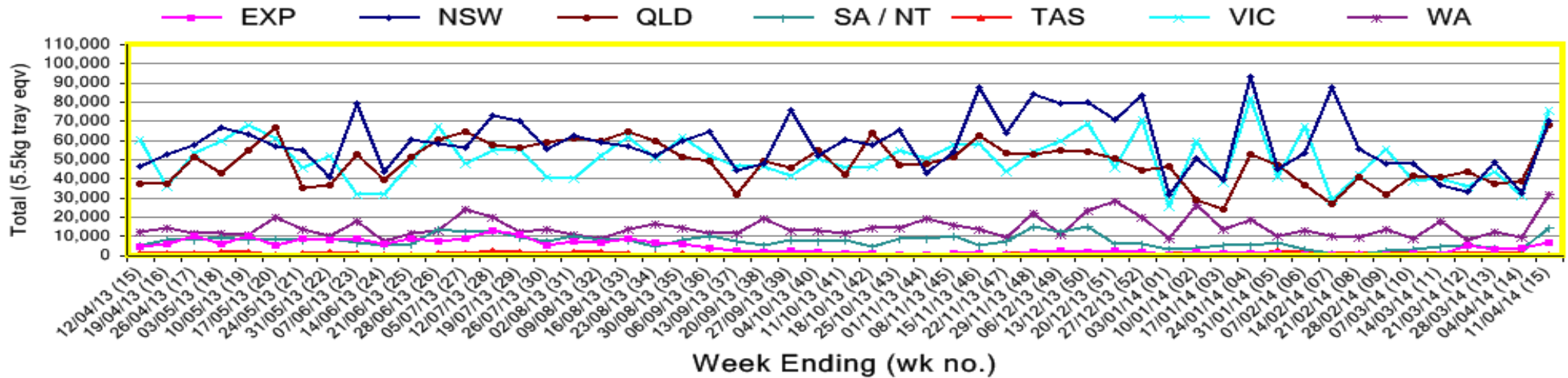
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	0	145,700	338,000	424,000	564,865	642,687	435,405	38,984	500	2,590,141
Australia (from Infocado)	16,341	83,173	283,934	582,190	587,056	596,527	450,236	92,727	835	2,693,019
USA¹	0	0	0	0	14	48	19	0		81
Japan¹	0	8,272	38,102	48,498	26,806	3,010	1,129	0		125,817
Other Asia¹	0	12,075	33,107	44,293	47,072	40,320	16,509	8,015		201,391
Total	16,341	103,520	355,143	674,981	660,948	639,905	467,893	100,742	835	3,020,308

1 source: Statistics NZ adjusted for freight time to destination port

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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 2,387,857 5.5kg tray eqv



Week 15 contributors - Packhouses

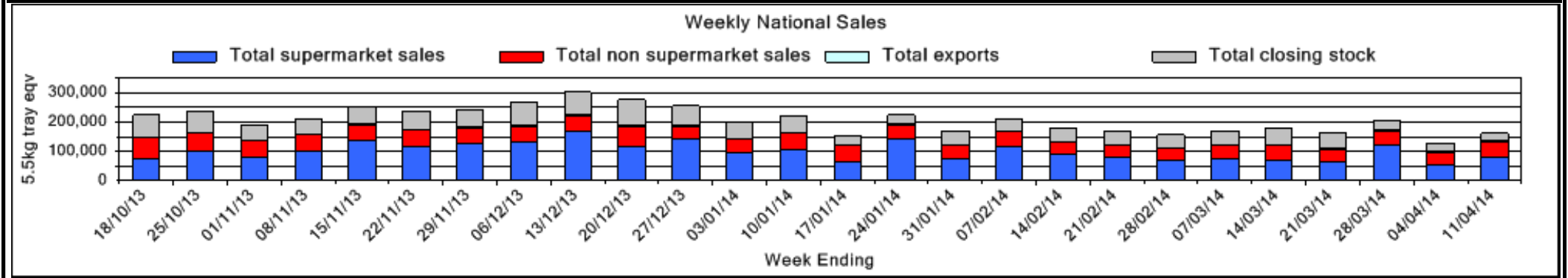
Natures Fruit Company (Consolidator)	Aussie Orchards Growers & Packers (NQ)
One Harvest (Consolidator)	Aussie Orchards Growers & Packers (NQ)
Sunfresh (Consolidator)	Avocado Estates (NQ)
The Avolution (Consolidator)	Battistin Orchards Pty Ltd (NQ)
Donovan Family Investment Trust (CQ)	Gunnado Farm (NQ)
Simpson Farms Pty Ltd (CQ)	R & M Waterman (NQ)
Sunny Bluff Produce Pty Ltd (CQ)	Tinaroo Falls Avocado Trust (NQ)
Sunnyspot Packhouse Pty Ltd (CQ)	SC: Less than 3 contributors
SuperPak (CQ)	

Week 15 contributors - Wholesalers

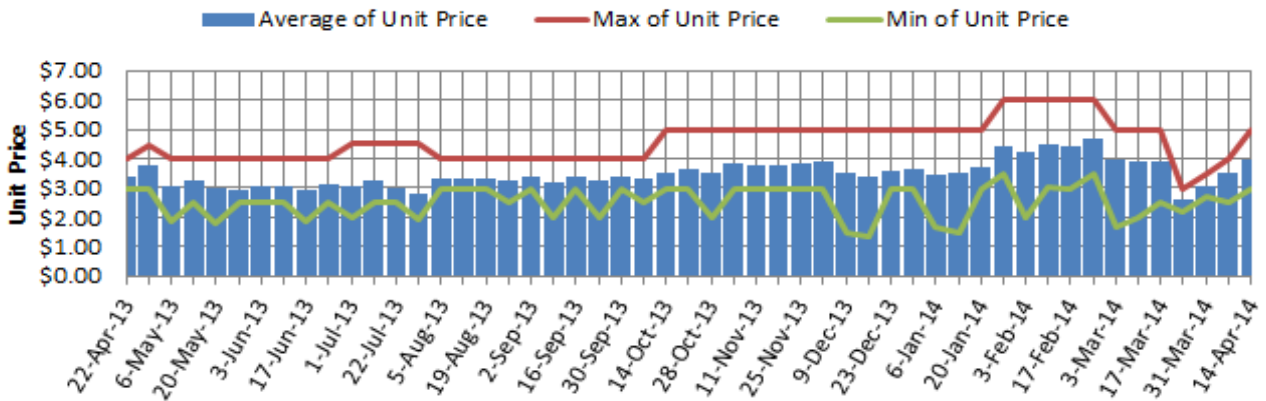
Allcrops Pty Ltd (Sydney)	Fresh Choice WA Pty Ltd (Perth)
C & S Ponte Produce Pty Ltd (Melbourne)	Murray Bros (Brisbane)
Costa Farms (Adelaide)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Dykes Bros (Melbourne)	The La Manna Group (Adelaide)
Etherington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

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

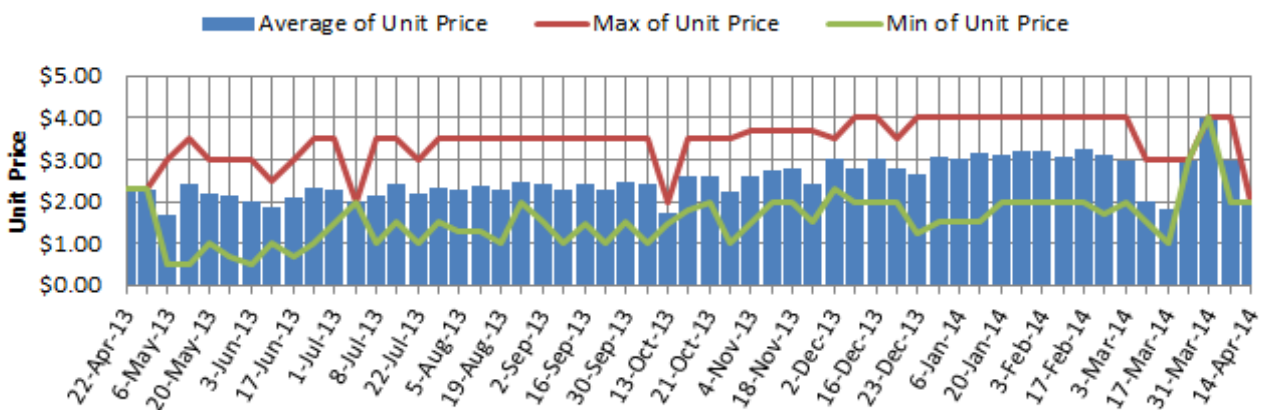
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	320	19,457		19,777							480		480	87	320	19,544		19,864
Total non supermarket sales	1,541	3,158	78	4,777	720	257		977	1,776						2,850	3,625	78	6,553
Total exports																		
Total sales	1,861	22,615	78	24,554	720	257		977	1,776		480		480	87	3,170	23,170	78	26,418
Total Stock on Hand	569	2,070		2,639	1,034	120		1,154	2,098						2,449	2,288		4,737
QLD																		
Total supermarket sales	5,018	16,074		21,092	596	48		644	1,171		600		600	109	6,102	16,270		22,372
Total non supermarket sales	10,962	3,669		14,631	32	857		889	1,616						11,020	5,227		16,247
Total exports		5,190		5,190		672		672	1,222							6,412		6,412
Total sales	15,980	24,933		40,913	628	1,577		2,205	4,009		600		600	109	17,122	27,909		45,031
Total Stock on Hand	6,695	1,636		8,331	136	400		536	975						6,942	2,363		9,306
SA & TAS																		
Total supermarket sales		6,096	520	6,616							360		360	65		6,161	520	6,681
Total non supermarket sales	2,329	5,910	1,052	9,291	254	446	35	735	1,336						2,791	6,721	1,116	10,627
Total exports																		
Total sales	2,329	12,006	1,572	15,907	254	446	35	735	1,336		360		360	65	2,791	12,882	1,636	17,309
Total Stock on Hand	2,108	1,390	1,168	4,666	521	6	4	531	965						3,055	1,401	1,175	5,631
VIC																		
Total supermarket sales	160	29,151		29,311		125		125	227		900		900	164	160	29,542		29,702
Total non supermarket sales	530	6,255	106	6,892	154	1,158	48	1,360	2,473	4			4	1	811	8,361	194	9,365
Total exports																		
Total sales	690	35,406	106	36,203	154	1,283	48	1,485	2,700	4	900		904	164	971	37,903	194	39,067
Total Stock on Hand	432	2,385		2,817	33	587		620	1,127						492	3,452		3,944
WA																		
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	1,891	3,924		5,815	1,183	68		1,251	2,275						4,042	4,048		8,090
Total Stock on Hand																		
Total																		
Total supermarket sales	5,498	73,816	520	79,834	596	173		769	1,398		2,340		2,340	425	6,582	74,556	520	81,658
Total non supermarket sales	17,253	19,878	1,236	38,368	2,343	2,786	83	5,212	9,476	4			4	1	21,514	24,944	1,387	47,845
Total exports		5,190		5,190		672		672	1,222							6,412		6,412
Total sales	22,751	98,884	1,756	123,392	2,939	3,631	83	6,653	12,096	4	2,340		2,344	426	28,096	105,911	1,907	135,914
Total Stock on Hand	11,091	7,486	1,168	19,745	2,261	1,113	4	3,378	6,142						15,202	9,509	1,175	25,887



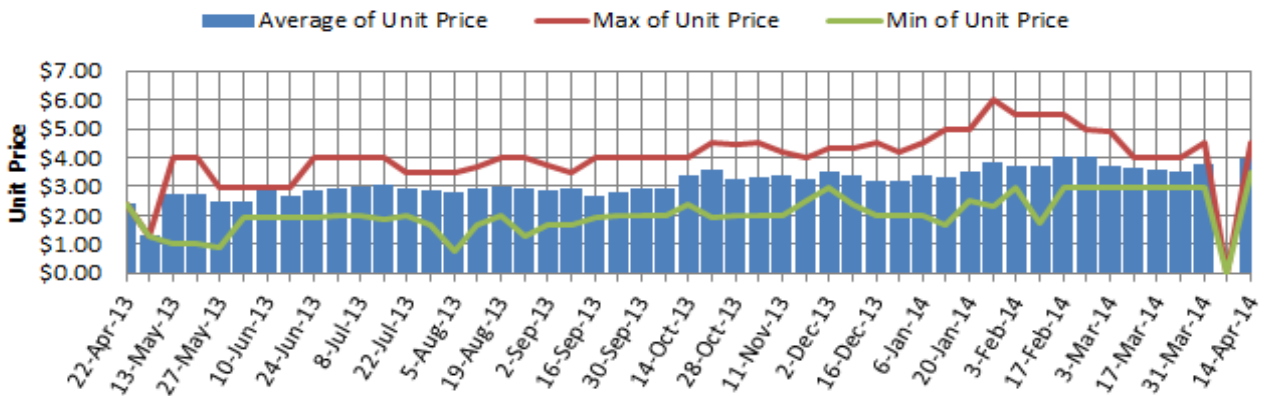
Hass Avocado Average Retail Prices - Sydney



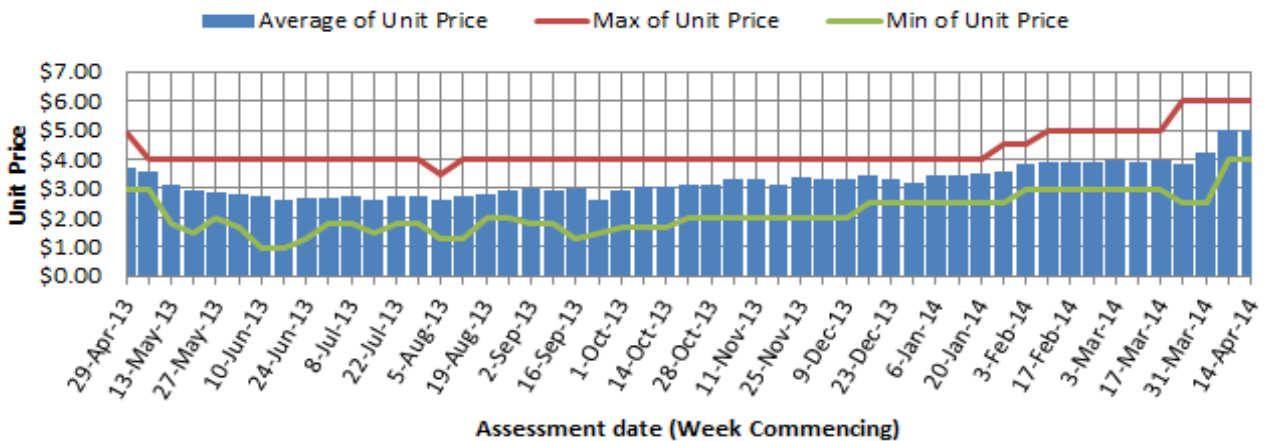
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

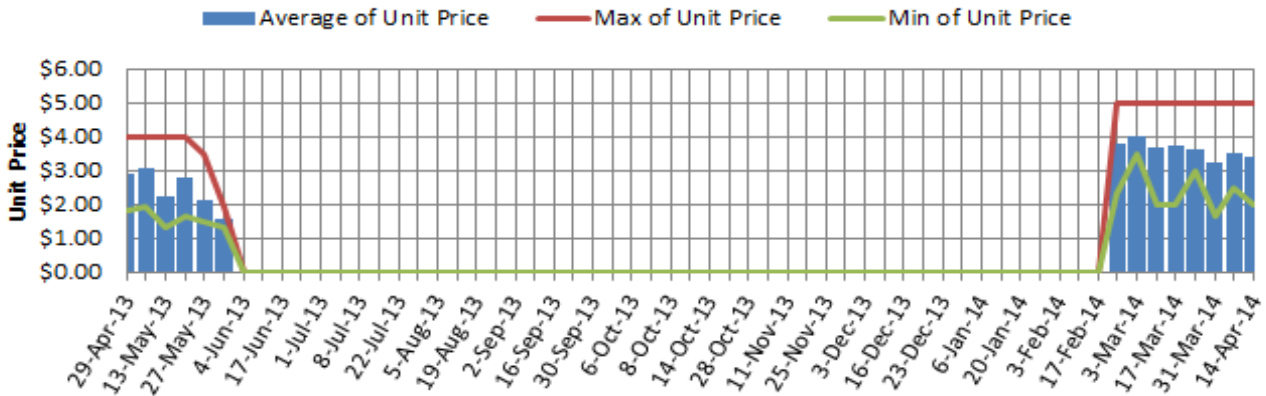


Hass Avocado Average Retail Prices - Perth

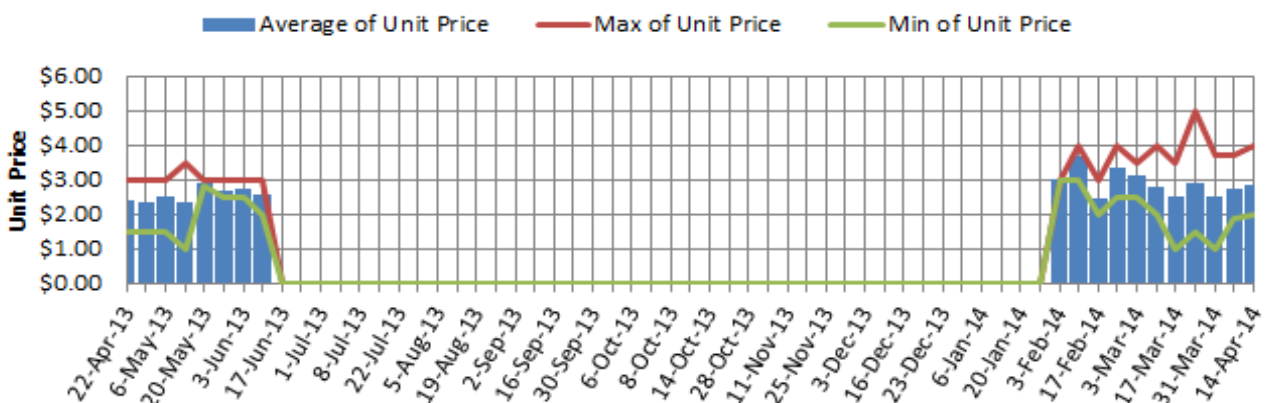


Assessment date (Week Commencing)

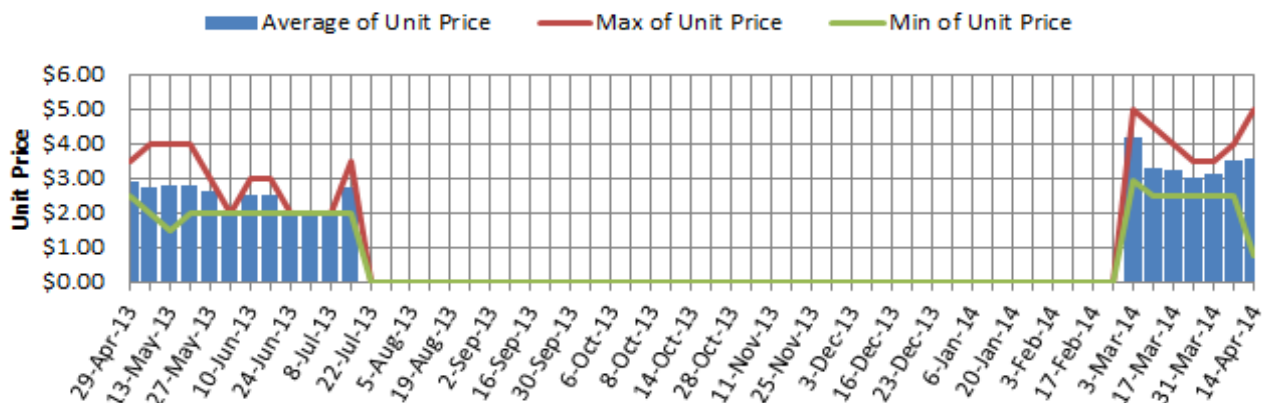
Shepard Avocado Average Retail Prices - Sydney



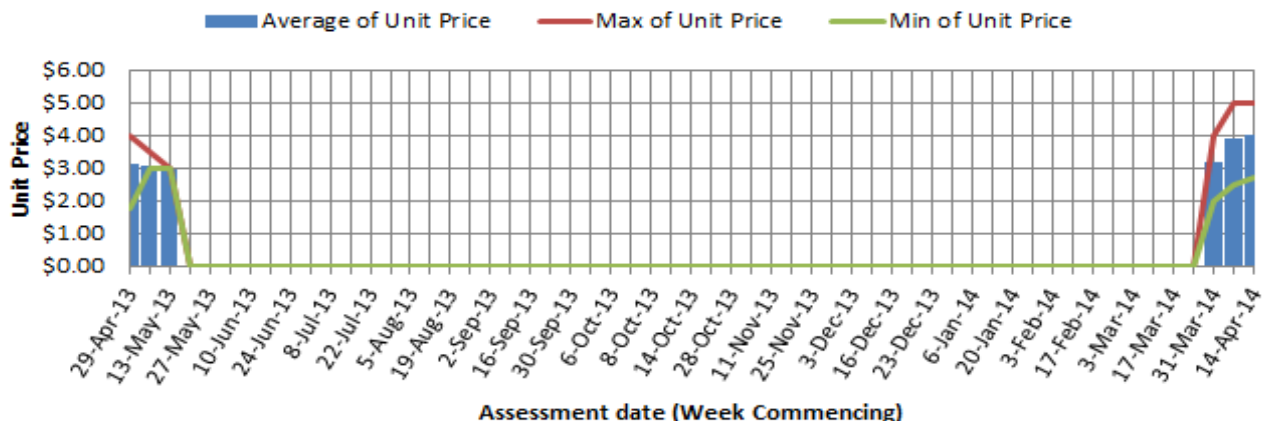
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 14th April 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					
Foodworks	Shepard	130	\$1.99	No	Aus	I	Shepard	160	\$0.77	No	NS
I	Shepard	170	\$2.50	Store	Aus	I	Shepard	180	\$2.99	No	Aus
Woolworths	Shepard	260	\$2.96	No	Aus	I	Shepard	280	\$2.99	No	Aus
Coles	Shepard	300	\$2.98	No	Aus	Coles	Shepard	250	\$3.48	No	Aus
Coles	Shepard	280	\$2.98	No	Aus	Coles	Shepard	250	\$3.48	No	Aus
Coles	Shepard	280	\$2.98	No	Aus	Coles	Shepard	240	\$3.48	No	Aus
I	Shepard	260	\$2.99	No	Aus	IS	Shepard	250	\$3.49	No	Aus
I	Hass	200	\$2.99	No	Aus	I	Hass	235	\$3.49	No	NS
I	Shepard	200	\$2.99	Store	Aus	Safeway	Shepard	295	\$3.98	No	Aus
IGA	Shepard	230	\$3.48	No	Aus	Safeway	Shepard	260	\$3.98	No	Mixed
Woolworths	Shepard	290	\$3.48	No	Aus	Safeway	Shepard	240	\$3.98	No	Aus
Woolworths	Shepard	270	\$3.48	No	Aus	IGA	Shepard	290	\$3.99	No	Aus
IGA	Shepard	270	\$3.95	No	Aus	I	Hass	225	\$4.49	No	Aus
I	Hass	260	\$3.99	No	Aus	I	Shepard	320	\$4.99	No	Aus
I	Shepard	250	\$3.99	No	Aus	I	Shepard	350	\$4.99	No	Aus
I	Hass	210	\$3.99	No	Aus	PERTH					
Foodworks	Hass	300	\$4.99	No	Aus	IS	Shepard	145	\$2.69	Store	Aus
I	Shepard	310	\$4.99	No	Aus	Coles	Shepard	220	\$3.98	No	Aus
I	Shepard	280	\$4.99	No	Aus	Coles	Shepard	220	\$3.98	No	Aus
BRISBANE						Woolworths	Shepard	195	\$3.98	No	Aus
I	Shepard	195	\$1.99	No	Aus	Woolworths	Shepard	200	\$3.98	Store	Aus
I	Hass	205	\$1.99	No	Aus	Woolworths	Shepard	210	\$3.98	No	Aus
I	Shepard	200	\$1.99	Store	Aus	Coles	Shepard	225	\$3.98	No	Aus
IGA	Shepard	160	\$2.00	Cat	Aus	IGA	Shepard	225	\$3.99	No	Aus
IGA	Shepard	180	\$2.00	Cat	Aus	I	Shepard	260	\$3.99	No	Aus
Woolworths	Shepard	200	\$2.48	No	Aus	I	Shepard	230	\$3.99	No	Aus
IGA	Shepard	180	\$2.49	Cat	Aus	I	Hass	250	\$3.99	No	Aus
IGA	Shepard	160	\$2.49	Cat	Aus	I	Shepard	220	\$3.99	No	Aus
Coles	Shepard	220	\$2.98	No	Aus	IGA	Shepard	200	\$4.29	No	Aus
Woolworths	Shepard	205	\$2.98	No	Aus	IGA	Shepard	250	\$4.49	No	Aus
Coles	Shepard	220	\$2.98	No	Aus	I	Hass	240	\$4.98	No	NZ
Woolworths	Shepard	250	\$2.98	No	Aus	IGA	Shepard	255	\$4.99	No	Aus
Coles	Shepard	185	\$2.98	No	Aus	I	Hass	280	\$5.99	No	Aus
I	Shepard	225	\$2.99	No	Aus						
I	Shepard	310	\$3.00	Store	Aus						
I	Shepard	205	\$3.00	Store	Aus						
I	Shepard	205	\$3.50	Store	Aus						
I	Shepard	330	\$3.50	Store	Aus						
I	Shepard	330	\$3.69	Store	Aus						
I	Shepard	210	\$3.99	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