



INFOCADO WEEKLY REPORT: 14th — 20th April 2012 (Wk 16)



Comments

- Given the volume of fruit in the market this week and what's forecasted for coming weeks, it is crucial for suppliers to work closely with wholesalers and supermarkets to move fruit through the system. Prices at a retail level will need to come down to help shift volumes. Store and category specials will help greatly.
- The April Quarterly Report was distributed yesterday. Please take the time to review the report and start planning/adjusting activities for your season as needed.
- All growers need to ensure fruit has reached the relevant Dry Matter levels prior to harvest. Hass needs to be at least 23% and Shepard at least 21%. Instructions on how to test Dry Matter at home can be found on our website by following the link on the left.
- More information on May marketing and promotional events will be featured in the coming editions of the Guacamole email newsletter.
- SC growers are reminded to enter their 4 weekly forecast as they near harvest.
- NZ forecasts and dispatches are not included in this report. The most up to date import data has been included on page 3 and has been sourced from Australia Customs records.

What you need to be aware of for next month

- In April/May the Avocados Australia Facebook page will be running a recipe competition encouraging fans to post quick and easy avocado recipes. Also, all creative materials are being updated from July onwards to incorporate a kangaroo and the new 'buy Australia' message. The I Heart Footy website and competition will be running again with a recipe competition as well as new teams and recipes to promote.
- Avocado TV commercials will be seen across the Lifestyle channel network including Lifestyle YOU, HOME and the Lifestyle Channel. Programming includes Jamie's 30 Minute Meals, Good Chef Bad Chef, Come Dine with Me, Cake Boss, Secrets of a restaurant Chef and Mexican Food Made Simple.
- 250 chefs and key purchasers in the food service sector in Hong Kong, Singapore and Malaysia are being targeted in May for seven training classes on ways to use Australian avocados. The goal is to increase the understanding and usage of avocados, thus increasing sales. The classes are open for anyone in the industry to attend at their own expense. For more information contact Gunjan Tandan at HAL on gunjan.tandan@horticulture.com.au
- Based off the April 2012 Quarterly Report 1,325,715 5.5kg eqv trays are expected in the market place for May. 1,218,405 5.5kg eqv trays are expected for Hass, 35,348 5.5kg trays for Shepard and 71,962 5.5kg eqv trays for other varieties.

Upcoming Holidays

ANZAC Day: 25 April | QLD Labour Day: 7 May | WA Foundation Day: 4 June | QLD, NSW, VIC, NZ Queens Birthday :11 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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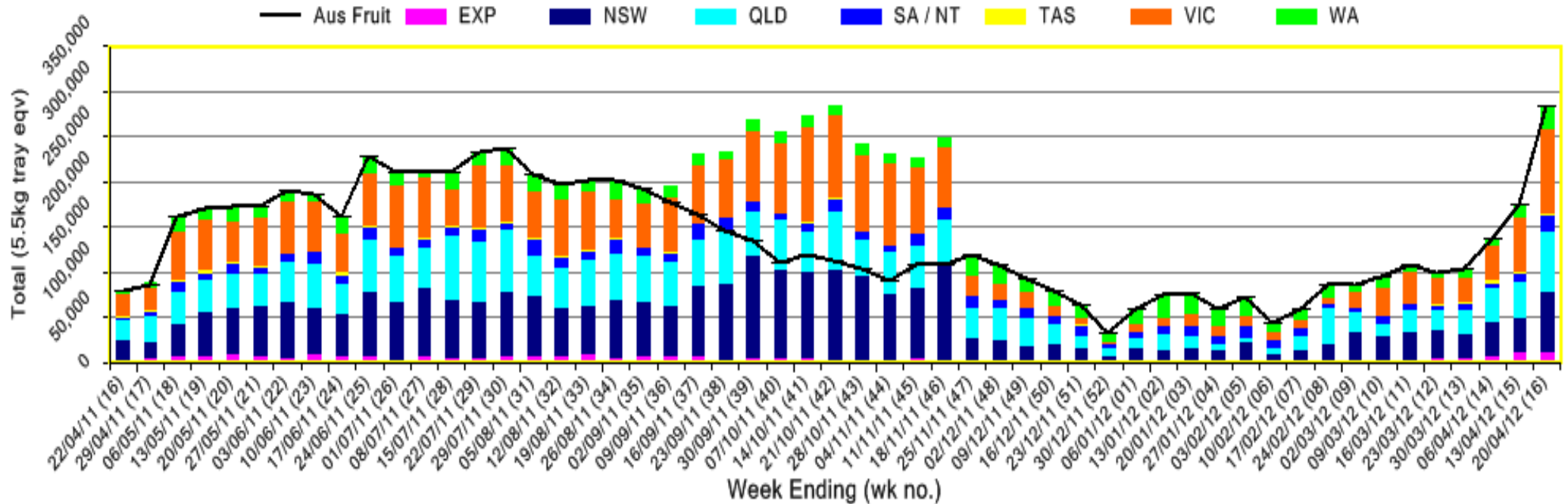
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Industry Dispatches By Destination State and Count Size : 14th April - 20th April 2012 (Wk 16)

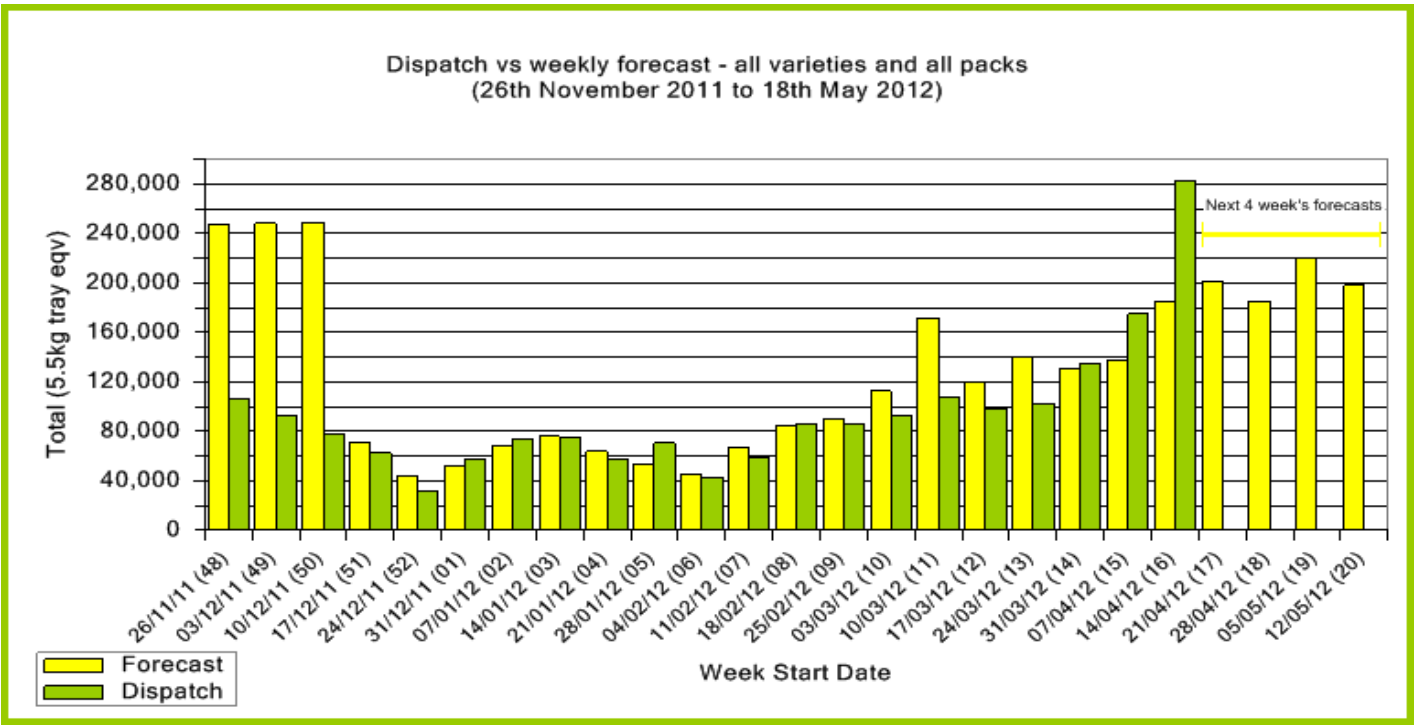
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Other	5.5Kg Eqv Trays All				
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total				
EXP									3,156	4,112				7,268	1,571			10,124
NSW	316	1,034	2,652	5,784	1,701	7,592	12,975	3,840	32					35,926	17,695	1,508		68,373
QLD	131	211	818	6,383	2,320	7,693	12,932	12,424	3,054					45,966	10,349	5,059	2,000	66,066
SA / NT		1,012	851	3,981	40	3,151	3,582	2,599						15,216	916	1,200		17,099
TAS						494	1,319							1,813	288			2,337
VIC	1,005	3,522	9,068	14,918	4,360	13,309	12,734	5,281	90					64,287	16,108	6,428		94,743
WA		14	144	1,916		2,263	8,226	1,742	160					14,465	5,090			23,720
Total	1,452	5,793	13,533	32,982	8,421	34,502	51,768	29,042	7,448					184,941	52,017	14,195	2,000	282,462

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2012 to date = 1,601,823 5.5kg tray eqv



Forecast Data (Week 16 - 20)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 16 - begin 14/04/2012					
Fuerte	980	1,005			2,807
Hass	80,000	29,200	4,000		133,818
Pinkerton	1,200	900			2,836
Sharwil	950	360			1,605
Shepard	38,500	1,900	3,000	2,500	42,955
Wurtz	300	50			391
Week Total	121,930	33,415	7,000	2,500	184,413
Week 17 - begin 21/04/2012					
Fuerte	60				60
Hass	108,800	33,300	4,000	1,500	170,345
Pinkerton	1,000	1,200			3,182
Sharwil	200	50			291
Shepard	20,550	400	3,000	2,500	22,277
Wurtz	4,600	300			5,145
Week Total	135,210	35,250	7,000	4,000	201,301
Week 18 - begin 28/04/2012					
Fuerte	40				40
Hass	117,300	26,300	4,000	1,500	166,118
Pinkerton	600	60			709
Sharwil	100	30			155
Shepard	12,500	500	3,000	2,000	14,318
Wurtz	4,000	100			4,182
Week Total	134,540	26,990	7,000	3,500	185,522
Week 19 - begin 05/05/2012					
Hass	139,300	36,300	4,000	1,500	206,300
Pinkerton	200	20			236
Sharwil	60	20			96
Shepard	9,100	100			9,282
Wurtz	3,500	50			3,591
Week Total	152,160	36,490	4,000	1,500	219,505
Week 20 - begin 12/05/2012					
Hass	134,300	34,000	6,000	1,500	197,482
Pinkerton	100	10			118
Sharwil	40	10			58
Wurtz	250	30			305
Week Total	134,690	34,050	6,000	1,500	197,963

Green shading indicates dispatch data				Yellow shading indicates forecast data		
Dispatch Data (Week 16 - begin 14/04/2012)						
Variety	Trays	Bulk	P/PK	Other	5.5Kg Eqv	
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays	
Bacon	2,100		1,297			4,458
Fuerte	1,644		545			2,635
Hass	127,058		36,968	9,764	2,000	196,412
Pinkerton	4,707		2,092			8,511
Sharwil	1,327		385			2,027
Shepard	42,057		9,678	4,431		60,459
Wurtz	6,048		1,052			7,961
Total	184,941	52,017	14,195	2,000		282,462



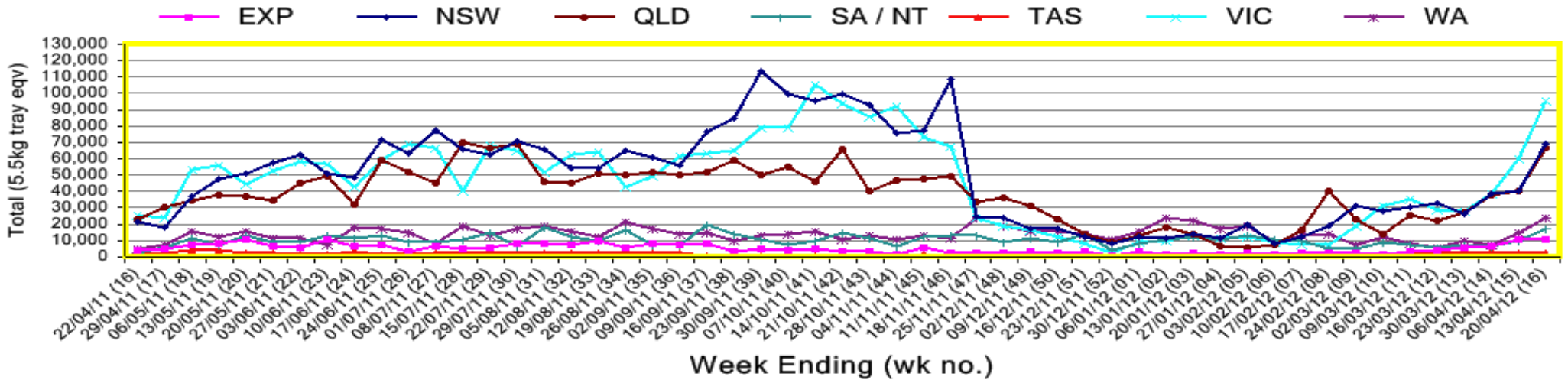
New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) August 2011-April 2012										
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to date
NZ Export to Australia Forecast	33,520	313,264	508,152	667,235	591,141	660,876	305,159	26,101	10,208	3,115,656
Australia		314,209	617,690	655,540	685,179	460,319	456,519	57,591		3,247,047
USA		11,782	47,380	36,098	3,000	9,358	1,073			108,691
Japan	818	24,196	106,337	123,344	4,760	17,582	12,322			289,359
Total	818	350,187	771,407	814,982	692,939	487,259	469,914	57,591		3,645,097

Percentage dispatched by region (Based on seasonal forecast - 2012)

■ Dispatch for season so far as a proportion of regional forecast
■ 12 month relative regional Forecast



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2012 to date = 1,601,823 5.5kg tray eqv



Week 16 contributors - Packhouses

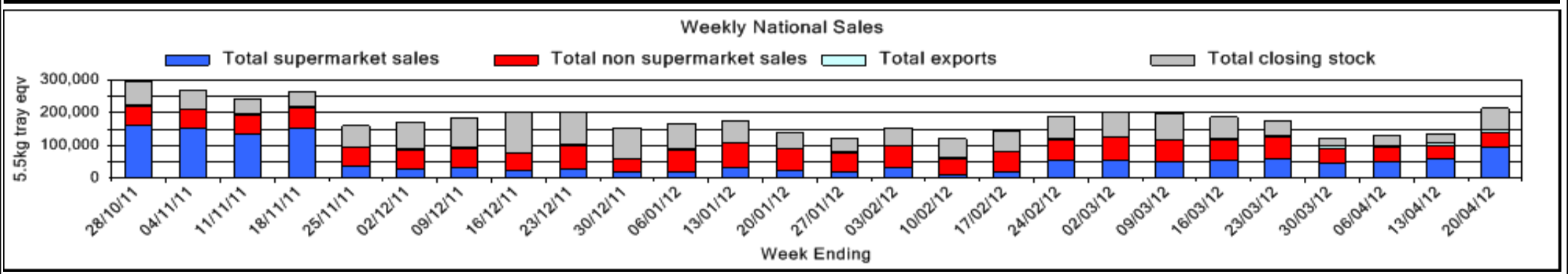
Donovan Family Investment Trust	Sunfresh
Lavers Orchards	Sunny Bluff Produce Pty Ltd
Natures Fruit Company	Sunnyspot Packhouse Pty Ltd
One Harvest	SuperPak
R & M Waterman	Tinaroo Falls Avocado Trust
Simpson Farms Pty Ltd (Goodwood Home)	

Week 16 contributors - Wholesalers

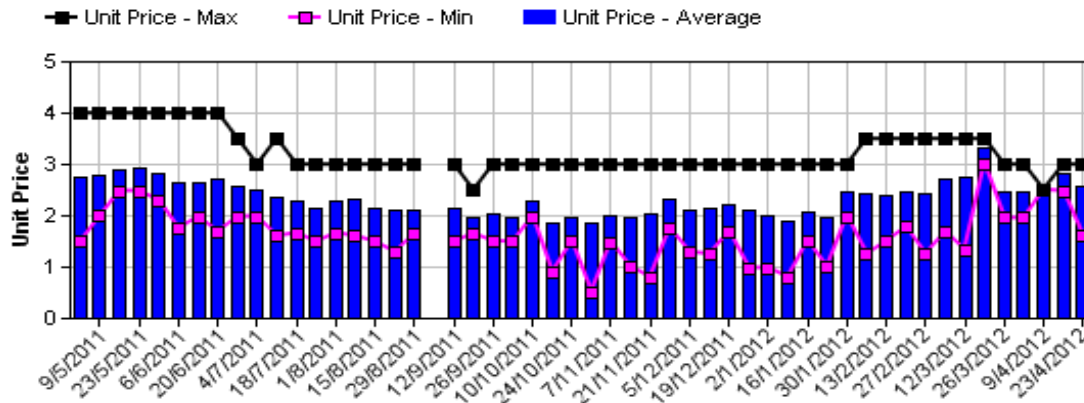
Allcrops Pty Ltd (Sydney)	Fresh Express Produce Pty Ltd (Perth)
Avanti Fresh Produce Pty Ltd (Melbourne)	Freshmax Pty Ltd (Brisbane)
Costa Farms (Adelaide)	Kelly's (Melbourne)
Costa Farms (Brisbane)	Murray Bros (Brisbane)
Costa Farms (Melbourne)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Perth)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Dykes Bros (Melbourne)	The La Manna Group (Adelaide)
Etherington (Perth)	The La Manna Group (Melbourne)
Exotic Fruit Traders (Sydney)	United Fresh (Adelaide)
Fresh Choice WA Pty Ltd (Perth)	

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

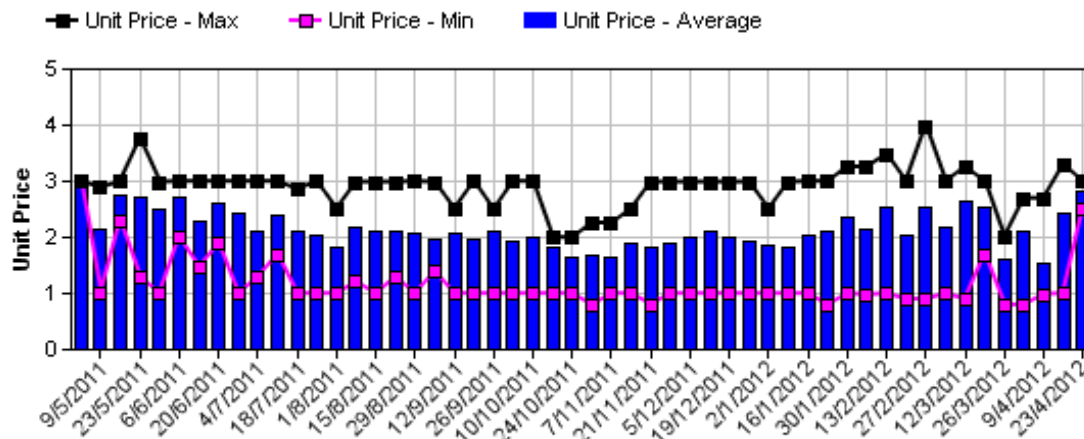
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	8,087	1,320	663	10,070	3,456	160	369	3,985	7,245	1,296	212		1,508	274	14,606	1,649	1,334	17,590
Total non supermarket sales	4,034	745	200	4,979	774			774	1,407						5,441	745	200	6,386
Total exports																		
Total sales	12,121	2,065	863	15,049	4,230	160	369	4,759	8,653	1,296	212		1,508	274	20,048	2,394	1,534	23,976
Total Stock on Hand	1,126	120		1,246	403	96		499	907						1,859	295		2,153
QLD																		
Total supermarket sales	12,641	9,274		21,915	1,647	110	1	1,758	3,196		3,139		3,139	571	15,636	10,045	2	25,682
Total non supermarket sales	12,407	1,837		14,244	1,534	816	14	2,364	4,298						15,196	3,321	25	18,542
Total exports	7,086	182		7,268	1,374	197		1,571	2,856						9,584	540		10,124
Total sales	32,134	11,293		43,427	4,555	1,123	15	5,693	10,351		3,139		3,139	571	40,416	13,906	27	54,349
Total Stock on Hand	23,572	1,023		24,595	1,050	236		1,286	2,338						25,481	1,452		26,933
SA & TAS																		
Total supermarket sales	8,339	4,758		13,097						120	1,080		1,200	218	8,361	4,954		13,315
Total non supermarket sales	1,290		652	1,942	80	167	1,613	1,860	3,382						1,435	304	3,585	5,324
Total exports																		
Total sales	9,629	4,758	652	15,039	80	167	1,613	1,860	3,382	120	1,080		1,200	218	9,796	5,258	3,585	18,639
Total Stock on Hand	11,456		3,761	15,217	822			822	1,495						12,951		3,761	16,712
VIC																		
Total supermarket sales	19,834	6,357		26,191	2,016	38		2,054	3,735	2,040			2,040	371	23,870	6,426		30,296
Total non supermarket sales	2,814	949	4,907	8,671	168	373	552	1,093	1,987						3,119	1,627	5,911	10,658
Total exports																		
Total sales	22,648	7,306	4,907	34,862	2,184	411	552	3,147	5,722	2,040			2,040	371	26,990	8,053	5,911	40,954
Total Stock on Hand	5,295	2,709	1,929	9,934	509	107	132	748	1,360						6,221	2,904	2,169	11,294
WA																		
Total supermarket sales	7,704	1,760		9,464	288	96		384	698						8,228	1,935		10,162
Total non supermarket sales	1,105	192		1,297	671	188		859	1,562						2,325	534		2,859
Total exports																		
Total sales	8,809	1,952		10,761	959	284		1,243	2,260						10,553	2,468		13,021
Total Stock on Hand	4,548			4,548	1,111			1,111	2,020						6,568			6,568
Total																		
Total supermarket sales	56,605	23,469	663	80,737	7,407	404	370	8,181	14,875	3,456	4,431		7,887	1,434	70,701	25,009	1,336	97,046
Total non supermarket sales	21,650	3,723	5,759	31,133	3,227	1,544	2,179	6,950	12,636						27,517	6,530	9,721	43,769
Total exports	7,086	182		7,268	1,374	197		1,571	2,856						9,584	540		10,124
Total sales	85,341	27,374	6,422	119,138	12,008	2,145	2,549	16,702	30,367	3,456	4,431		7,887	1,434	107,802	32,080	11,057	150,939
Total Stock on Hand	45,997	3,852	5,690	55,540	3,895	439	132	4,466	8,120						53,079	4,650	5,930	63,660



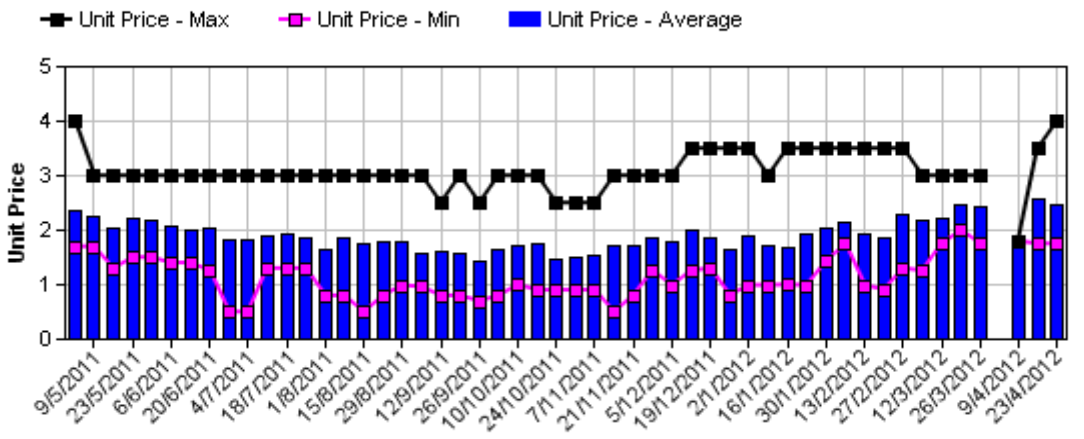
Hass Avocado Average Retail Prices - Sydney



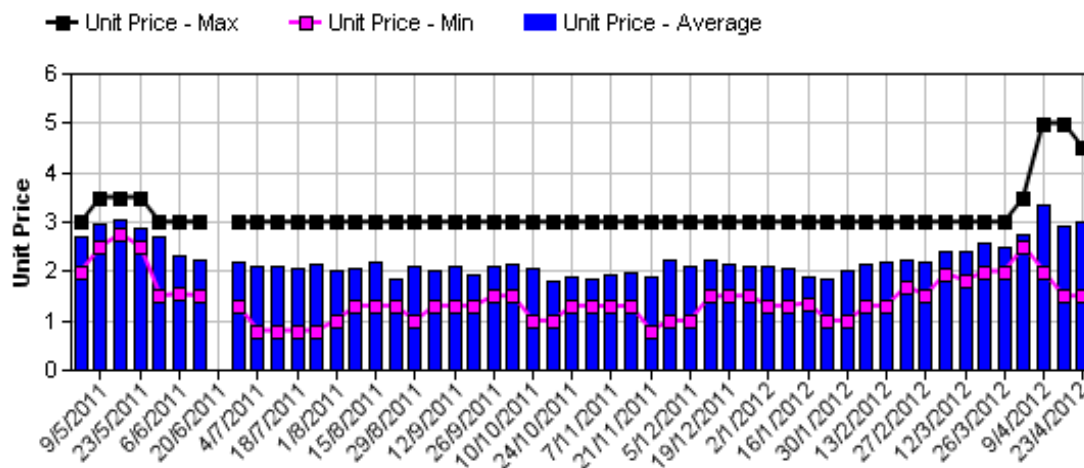
Hass Avocado Average Retail Prices - Melbourne



Hass Avocado Average Retail Prices - Brisbane

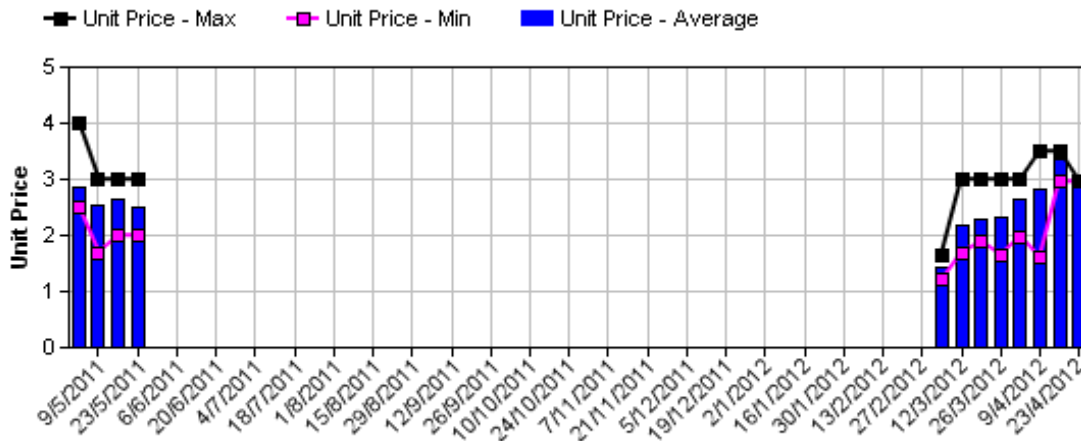


Hass Avocado Average Retail Prices - Perth

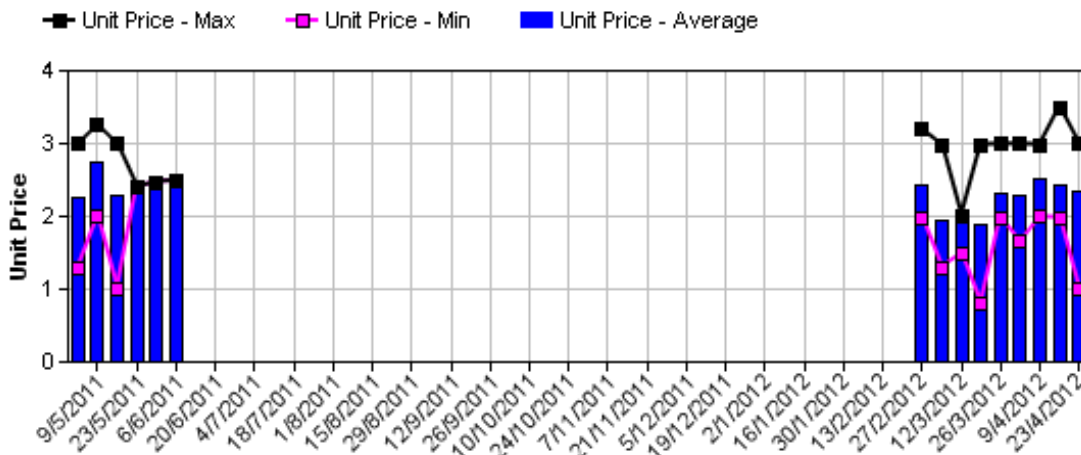


Assessment Date [Week Commencing]

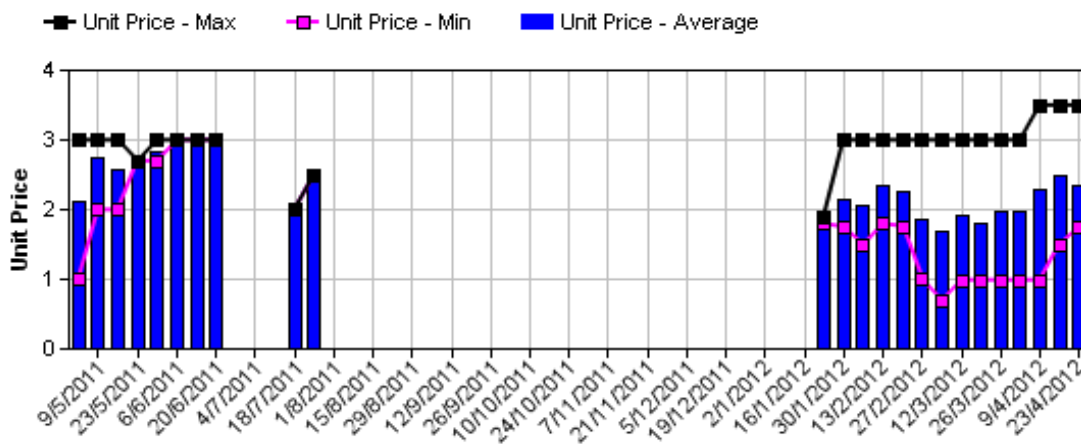
Shepard Avocado Average Retail Prices - Sydney



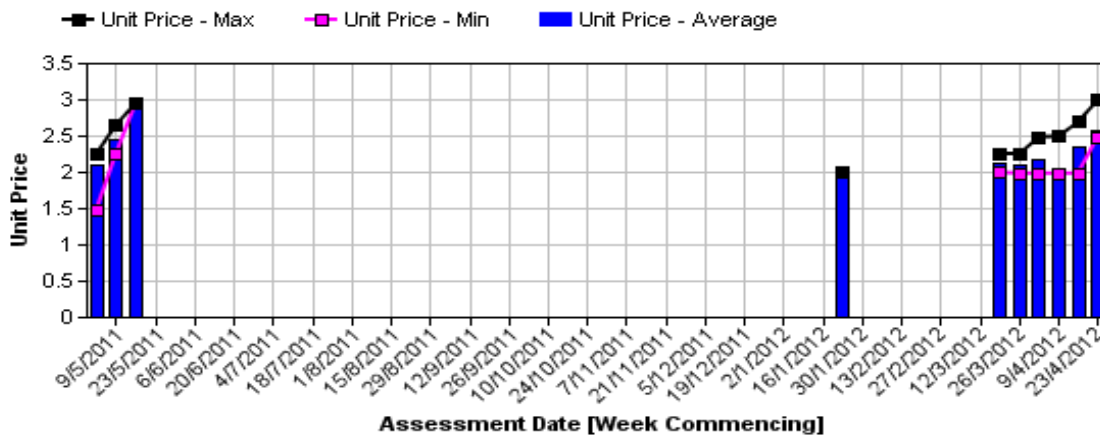
Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety - 23rd April 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin																		
SYDNEY						MELBOURNE																							
Coles	Hass	240	1.60	Cat	Aus	I	Shepard	195	0.99	No	NS																		
Coles	Hass	260	1.60	Cat	Aus	Safeway	Shepard	255	1.98	No	Aus																		
Coles	Hass	260	1.60	Cat	Aus	Safeway	Shepard	265	1.98	No	Aus																		
IGA	Hass	245	2.00	No	Aus	Safeway	Shepard	280	1.98	No	Aus																		
IGA	Hass	185	2.50	No	Aus	I	Shepard	254	2.40	No	Aus																		
Woolworths	Hass	280	2.68	Store	Aus	Coles	Shepard	275	2.48	No	Aus																		
Woolworths	Hass	290	2.68	No	Aus	Coles	Shepard	255	2.48	No	Aus																		
Woolworths	Hass	260	2.68	No	Aus	Coles	Shepard	275	2.48	No	Aus																		
I	Hass	255	2.69	No	Aus	I	Hass	280	2.49	No	NS																		
IGA	Shepard	240	2.95	No	Aus	I	Hass	245	2.49	No	NS																		
I	Hass	280	2.99	No	Aus	IS	Shepard	260	2.49	No	Aus																		
I	Hass	260	2.99	No	Aus	I	Hass	300	2.98	No	Aus																		
I	Hass	300	2.99	No	Aus	I	Shepard	270	2.98	No	Aus																		
I	Hass	310	2.99	No	Aus	IGA	Shepard	255	2.99	No	Aus																		
I	Hass	310	2.99	No	Aus	I	Hass	280	2.99	No	NS																		
Foodworks	Hass	290	2.99	No	Aus	I	Shepard	295	2.99	No	NS																		
I	Hass	245	2.99	No	Aus	I	Hass	285	2.99	No	Aus																		
BRISBANE						PERTH																							
IGA	Hass	200	1.74	No	Aus	I	Hass	160	1.49	No	Aus																		
IGA	Shepard	190	1.74	No	Aus	IGA	Hass	280	2.29	No	Aus																		
I	Shepard	265	1.79	Store	Aus	Coles	Shepard	220	2.48	No	Aus																		
Woolworths	Shepard	190	1.94	No	Aus	Coles	Shepard	250	2.48	No	Aus																		
Woolworths	Hass	200	1.94	No	Aus	Woolworths	Shepard	215	2.48	No	Aus																		
Woolworths	Shepard	170	1.94	No	Aus	Coles	Shepard	205	2.48	No	Aus																		
Woolworths	Shepard	220	1.94	No	Aus	Woolworths	Shepard	205	2.48	No	Aus																		
I	Hass	220	1.99	No	NS	Woolworths	Shepard	210	2.48	No	Aus																		
I	Hass	220	1.99	Store	Aus	I	Hass	160	2.49	No	Aus																		
IGA	Hass	200	1.99	No	NS	IS	Shepard	160	2.69	Store	Aus																		
Coles	Hass	260	2.48	No	Aus	IGA	Hass	230	2.79	No	Aus																		
Coles	Hass	270	2.48	No	NS	IGA	Shepard	235	2.99	No	NZ																		
Coles	Hass	250	2.48	No	Aus	I	Hass	275	2.99	No	Aus																		
I	Shepard	225	2.89	Store	Aus	I	Hass	290	3.49	No	Aus																		
I	Hass	245	2.99	Store	Aus	IS	Hass	240	3.99	No	Aus																		
I	Shepard	315	2.99	Store	Aus	I	Hass	285	4.49	No	Mixed																		
I	Hass	280	2.99	Store	NS	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Size ranges based on 5.5kg trays</th> </tr> <tr> <th>Size</th> <th>Weight Range</th> </tr> </thead> <tbody> <tr> <td>28</td> <td>185 - 208g</td> </tr> <tr> <td>25</td> <td>208 - 230g</td> </tr> <tr> <td>23</td> <td>230 - 245g</td> </tr> <tr> <td>22</td> <td>245 - 263g</td> </tr> <tr> <td>20</td> <td>263 - 290g</td> </tr> <tr> <td>18</td> <td>290 - 325g</td> </tr> <tr> <td>16</td> <td>325 - 363g</td> </tr> </tbody> </table>						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
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																												
I	Shepard	288	3.49	Store	Aus																								
I	Hass	275	3.99	No	Aus																								

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

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