



INFOCADO WEEKLY REPORT: 5th — 11th May 2012 (Wk 19)



Comments

- Volumes in the market last week dropped slightly compared with the week before; 165 924 5.5kg eqv trays vs 186 718 5.5kg eqv trays. Even so, it is critical for supply chain partners to be working together to help move fruit through the system. Export markets should be strongly considered to help alleviate pressure in the domestic market.
- Consumer research has shown that immature fruit greatly reduces consumer acceptance and thus negatively affects purchases. All growers need to ensure fruit has reached the relevant Dry Matter benchmarks 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.
- The review of the HAL funded avocado marketing program is underway and the Avocado IAC agreed to appoint research and consulting firm Review Partners Pty Ltd to conduct it. As part of their consultation process, Review Partners has set up an online survey for growers and other industry participants. The survey covers a range of topics and gives you the chance to explain your views in detail. It will remain active until Sunday 20 May and can be found at www.reviewpartners.com/avocados
- SC, SQ and Tam/NR growers are reminded to enter their 4 weekly forecast as they near harvest.
- 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

- PMA Fresh Connections 2012 is scheduled for 26-28 June in Melbourne. Growers, packers and marketers are strongly encouraged to attend as one of the keynote speakers at this year's event is Dr Jan de Lyser who is the Vice President Marketing for the California Avocado Commission (CAC), the US Produce Marketer of the Year 2011 and PMA Chair-elect. To register or learn more about the event follow this link: www.pmafreshconnections.com.au
- 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.
- Based off the April 2012 Quarterly Report 1,159,558 5.5kg eqv trays are expected in the market place for June. 1,103,148 5.5kg eqv trays are expected for Hass with the remainder being other varieties. No Shepards are forecasted for June.

Upcoming Holidays

WA Foundation Day: 4 June | QLD, NSW, VIC, NZ Queens Birthday :11 June

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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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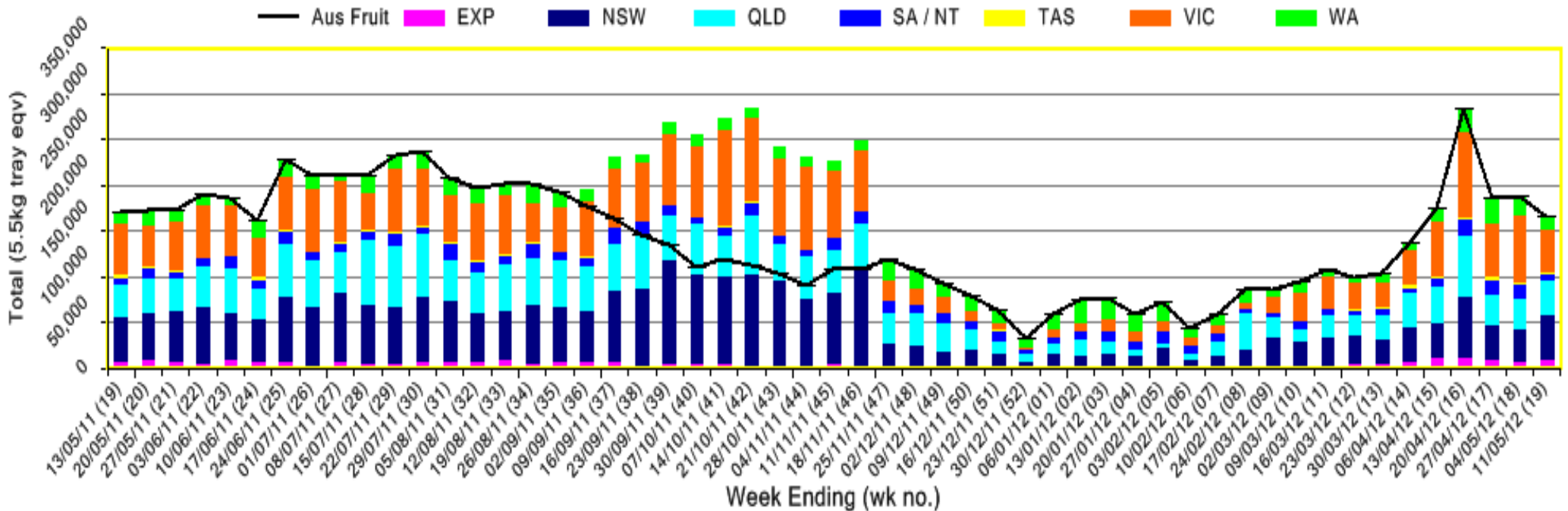
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Industry Dispatches By Destination State and Count Size : 5th May - 11th May 2012 (Wk 19)

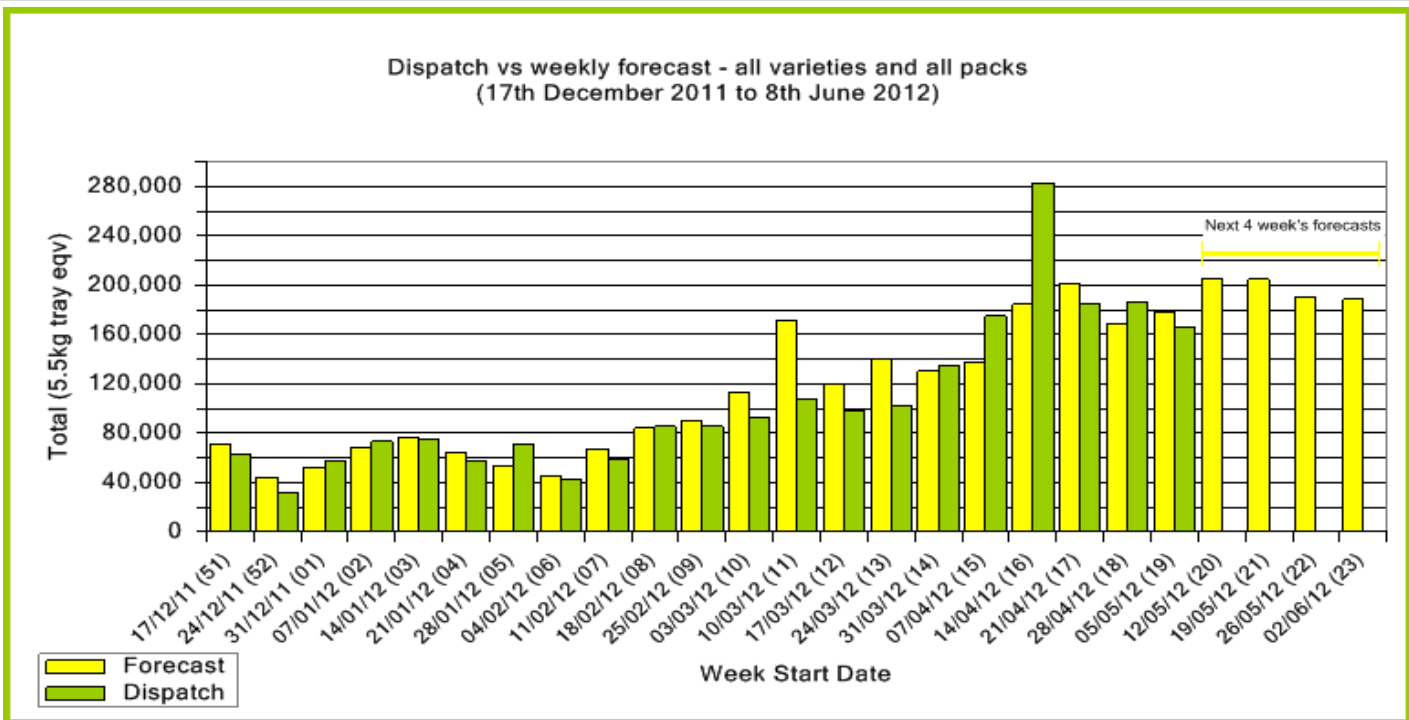
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total	
EXP								932	6,788		7,720	864	186		9,325
NSW	9	1,194	2,582	4,923	1,466	7,781	8,658	3,048	160	29,821	10,759	252		49,429	
QLD	176	176	639	1,195	731	6,329	7,182	8,562	1,298	26,288	4,409	1,104	9,200	36,178	
SA / NT		14	1,149	3,179	152	667	1,210	267		6,638	582	816		7,844	
TAS								320		320	384			1,018	
VIC	418	2,176	4,211	11,150	1,078	5,670	4,279	1,843	659	31,484	8,593	3,573		47,758	
WA		6	102	3,150		1,651	5,942	566		11,417	1,557	684		14,372	
Total	603	3,566	8,683	23,597	3,427	22,098	27,591	15,218	8,905	113,688	27,148	6,615	9,200	165,924	

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2012 to date = 2,139,095 5.5kg tray eqv



Forecast Data (Week 19 - 23)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 19 - begin 05/05/2012					
Hass	118,000	24,800	7,000	8,000	165,819
Pinkerton	50	10			68
Sharwil	60	20			96
Shepard	9,070	20			9,106
Wurtz	3,150	70			3,277
Week Total	130,330	24,920	7,000	8,000	178,367
Week 20 - begin 12/05/2012					
Bacon		32			58
Fuerte	250	10			268
Hass	136,100	33,850	9,000	11,000	201,281
Pinkerton	30	10			48
Sharwil	40	10			58
Shepard	380	20			416
Wurtz	3,120	20			3,156
Week Total	139,920	33,952	9,000	11,000	205,287
Week 21 - begin 19/05/2012					
Bacon		120			218
Fuerte	250	10			268
Hass	136,000	31,450	9,000	11,000	196,818
Pinkerton	30	10			48
Sharwil	40	10			58
Shepard	4,050	10			4,068
Wurtz	3,100	20			3,136
Week Total	143,470	31,630	9,000	11,000	204,615
Week 22 - begin 26/05/2012					
Bacon		120			218
Fuerte	250	10			268
Hass	128,800	30,600	6,000	8,000	186,982
Pinkerton	30	10			48
Sharwil	40	10			58
Shepard	40	10			58
Wurtz	3,080	20			3,116
Week Total	132,240	30,780	6,000	8,000	190,750
Week 23 - begin 02/06/2012					
Fuerte	250	10			268
Hass	128,900	29,500	6,000	8,000	185,082
Pinkerton	30	5			39
Wurtz	3,060	15			3,087
Week Total	132,240	29,530	6,000	8,000	188,477

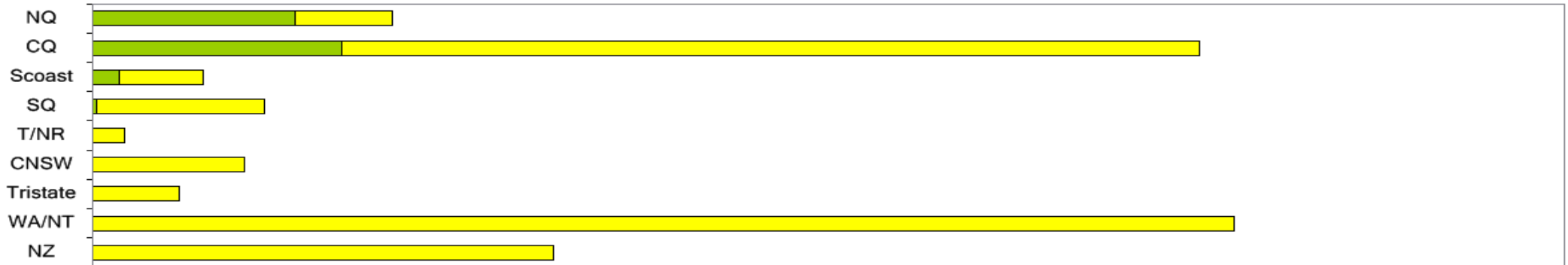
Green shading indicates dispatch data			Yellow shading indicates forecast data		
Dispatch Data (Week 19 - begin 5/05/2012)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Fuerte	223	20			259
Hass	105,520	26,512	6,255	9,200	156,534
Pinkerton	23				23
Sharwil	2,178	288			2,702
Shepard	4,306	232	360		4,793
Wurtz	1,438	96			1,613
Total	113,688	27,148	6,615	9,200	165,924



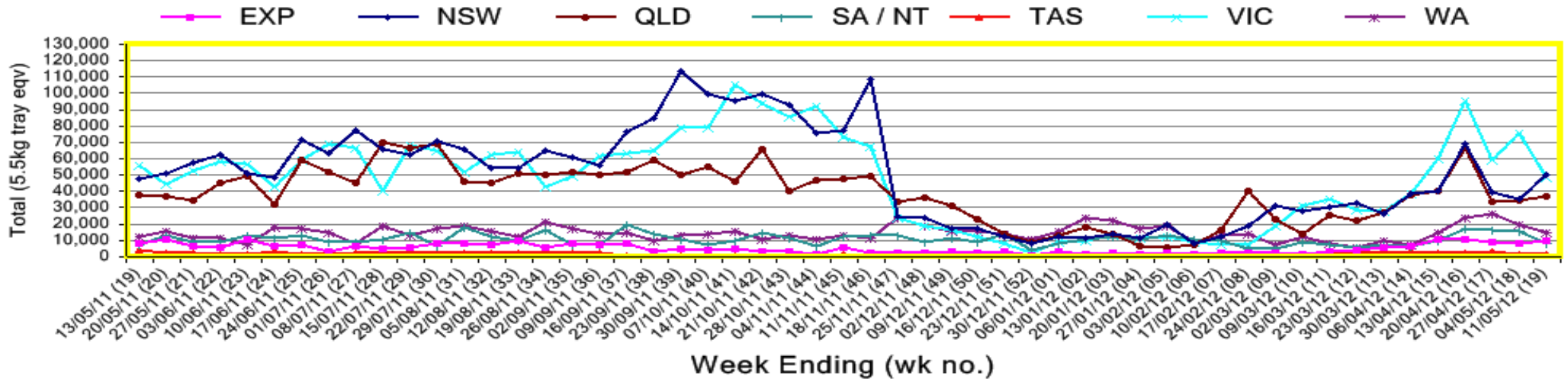
New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) August 2011-April 2012										
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to date
NZ Export to Australia Forecast	33,520	313,264	508,152	667,235	591,141	660,876	305,159	26,101	10,208	3,115,656
Australia		314,209	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 = 2,139,095 5.5kg tray eqv



Week 19 contributors - Packhouses

- | | |
|---------------------------------------|-----------------------------|
| Donovan Family Investment Trust | Sunfresh |
| G & C Christensen | Sunny Bluff Produce Pty Ltd |
| Lavers Orchards | Sunnyspot Packhouse Pty Ltd |
| Natures Fruit Company | SuperPak |
| One Harvest | Tinaroo Falls Avocado Trust |
| Simpson Farms Pty Ltd (Goodwood Home) | Tropicado Avocados |

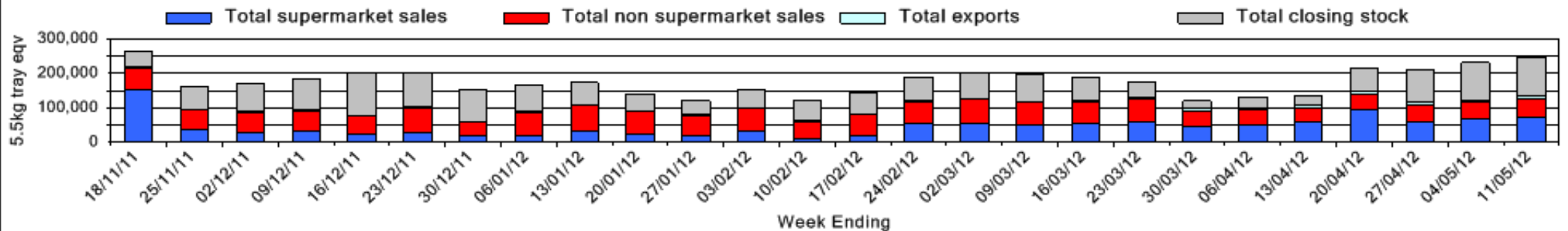
Week 19 contributors - Wholesalers

- | | |
|--|---|
| 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 (Brisbane) |
| Exotic Fruit Traders (Sydney) | The La Manna Group (Melbourne) |
| Fresh Choice WA Pty Ltd (Perth) | United Fresh (Adelaide) |

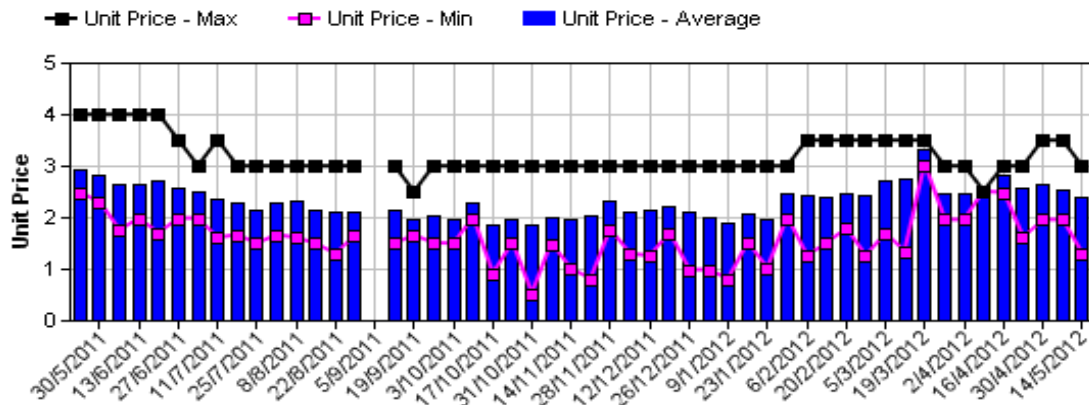
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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	16,024	1,563		17,587	96	227		323	587	252			252	46	16,244	1,976		18,220
Total non supermarket sales	6,233	40	83	6,356	1,420			1,420	2,582						8,815	40	83	8,938
Total exports																		
Total sales	22,257	1,603	83	23,943	1,516	227		1,743	3,169	252			252	46	25,059	2,016	83	27,158
Total Stock on Hand	3,352			3,352	1,148			1,148	2,087						5,439			5,439
QLD																		
Total supermarket sales	14,152	2,680	181	17,013	748			748	1,360		360		360	65	15,512	2,745	181	18,438
Total non supermarket sales	16,428	1,645		18,073	1,868	257		2,125	3,864						19,824	2,112		21,937
Total exports	7,720			7,720	864			864	1,571	186			186	34	9,325			9,325
Total sales	38,300	4,325	181	42,806	3,480	257		3,737	6,795	186	360		546	99	44,661	4,858	181	49,700
Total Stock on Hand	41,758	1,076		42,834	2,378	424		2,802	5,095						46,082	1,847		47,929
SA & TAS																		
Total supermarket sales	11,974			11,974	36			36	65	132			132	24	12,063			12,063
Total non supermarket sales	3,428		580	4,008	540			540	982						4,410		580	4,990
Total exports																		
Total sales	15,402		580	15,982	576			576	1,047	132			132	24	16,473		580	17,053
Total Stock on Hand	19,142		2,460	21,602	2,038			2,038	3,705						22,847		2,460	25,307
VIC																		
Total supermarket sales	11,566	63		11,629	864	5		869	1,580	1,656			1,656	301	13,438	72		13,510
Total non supermarket sales	4,882	2,557	1,679	9,119	2,340		625	2,965	5,391	26			26	5	9,141	2,557	2,815	14,514
Total exports																		
Total sales	16,448	2,620	1,679	20,748	3,204	5	625	3,834	6,971	1,682			1,682	306	22,579	2,629	2,815	28,024
Total Stock on Hand	9,639	-22	3,827	13,444	3,193	58	401	3,652	6,640	146			146	27	15,471	83	4,556	20,110
WA																		
Total supermarket sales	8,008			8,008	397			397	722						8,730			8,730
Total non supermarket sales	3,734			3,734	1,148			1,148	2,087	26			26	5	5,826			5,826
Total exports																		
Total sales	11,742			11,742	1,545			1,545	2,809	26			26	5	14,556			14,556
Total Stock on Hand	6,738			6,738	3,640			3,640	6,618	88			88	16	13,372			13,372
Total																		
Total supermarket sales	61,724	4,306	181	66,211	2,141	232		2,373	4,315	2,040	360		2,400	436	65,988	4,793	181	70,962
Total non supermarket sales	34,705	4,242	2,342	41,290	7,316	257	625	8,198	14,905	52			52	9	48,016	4,710	3,478	56,204
Total exports	7,720			7,720	864			864	1,571	186			186	34	9,325			9,325
Total sales	104,149	8,548	2,523	115,221	10,321	489	625	11,435	20,791	2,278	360		2,638	480	123,329	9,503	3,659	136,491
Total Stock on Hand	80,629	1,054	6,287	87,970	12,397	482	401	13,280	24,145	234			234	43	103,211	1,930	7,016	112,157

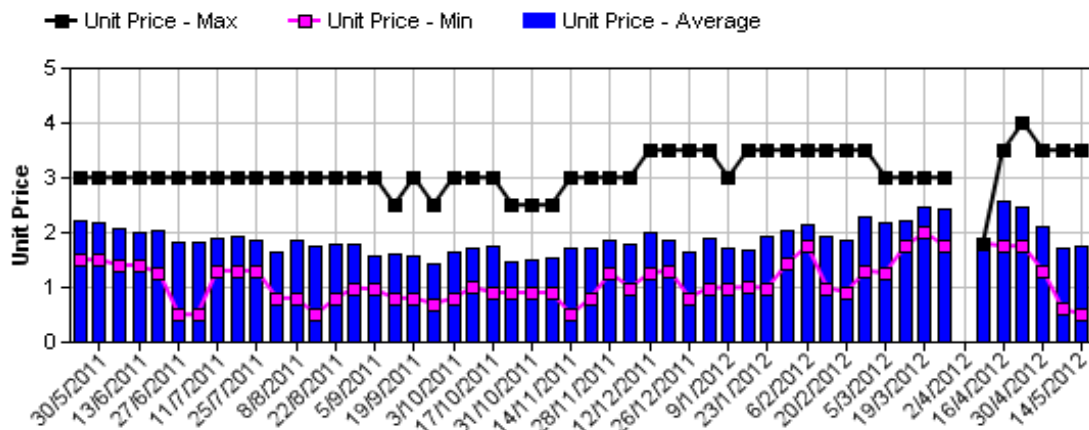
Weekly National Sales



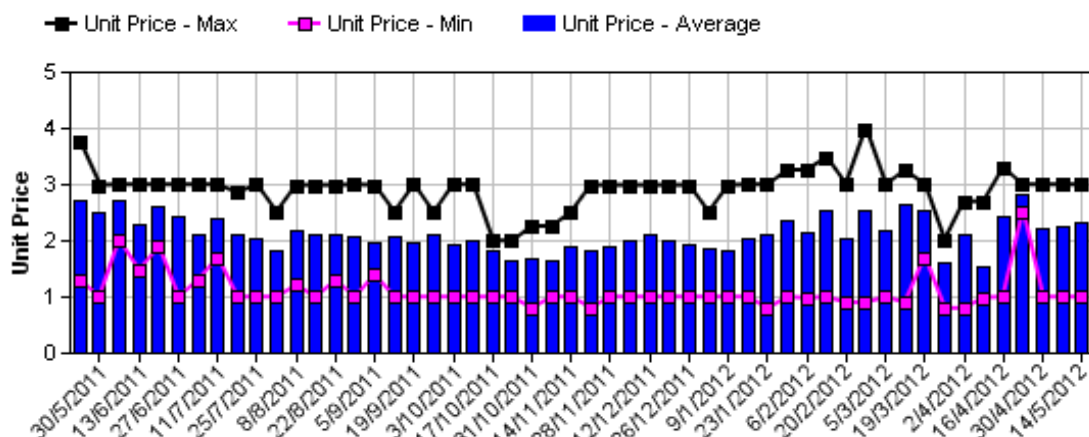
Hass Avocado Average Retail Prices - Sydney



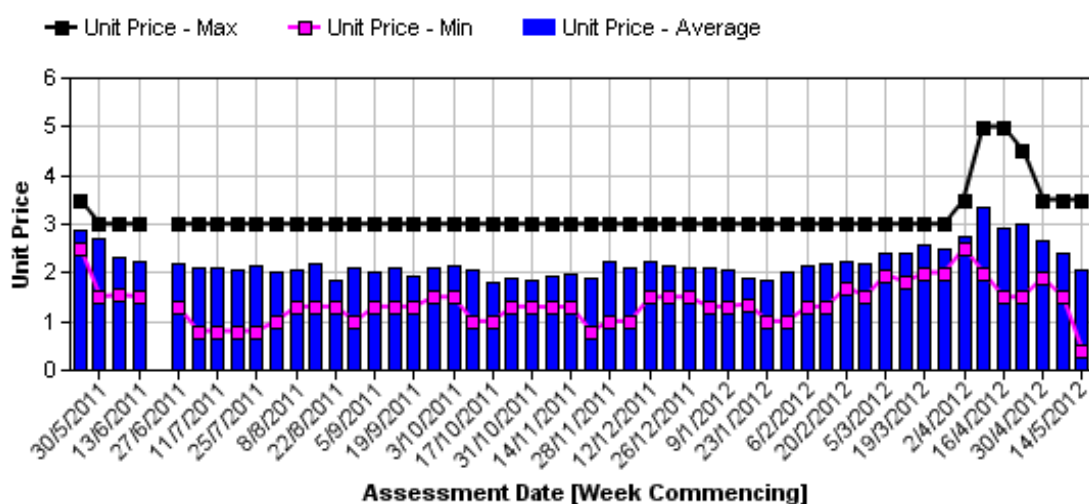
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

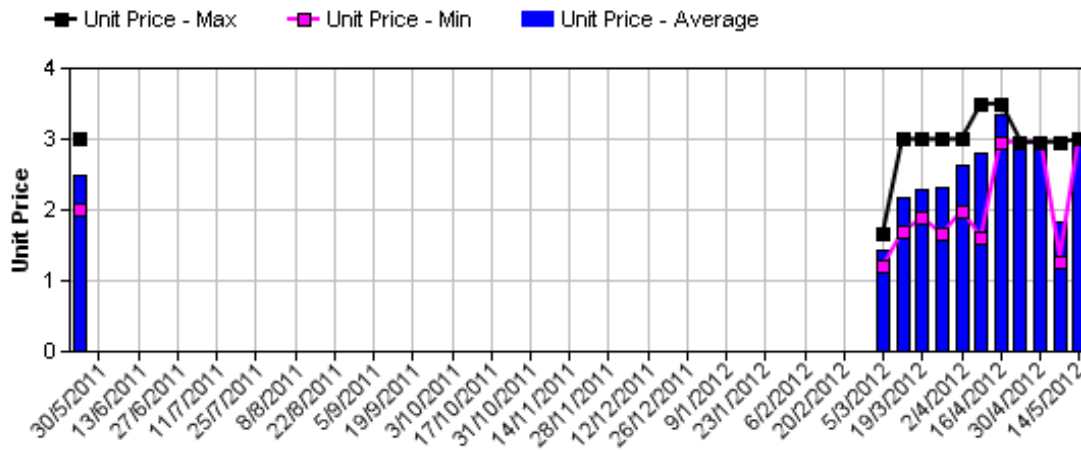


Hass Avocado Average Retail Prices - Perth

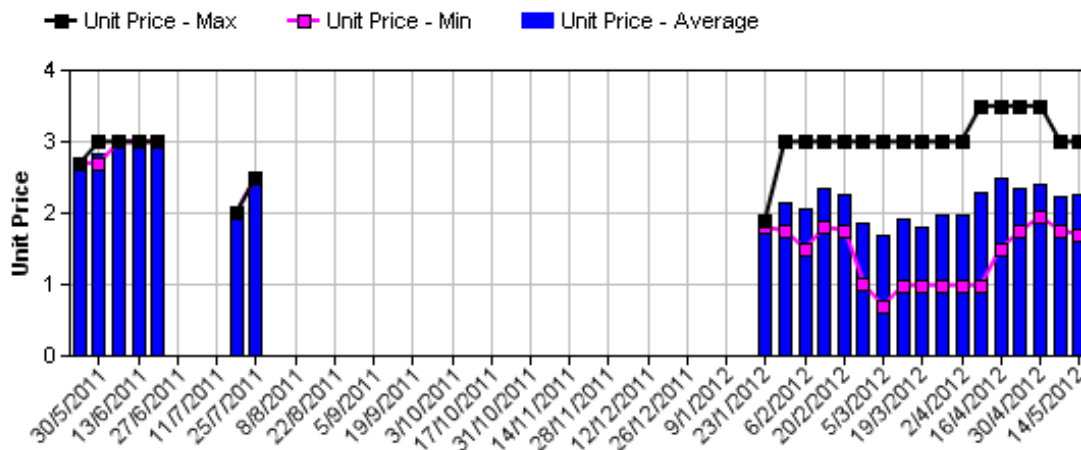


Assessment Date [Week Commencing]

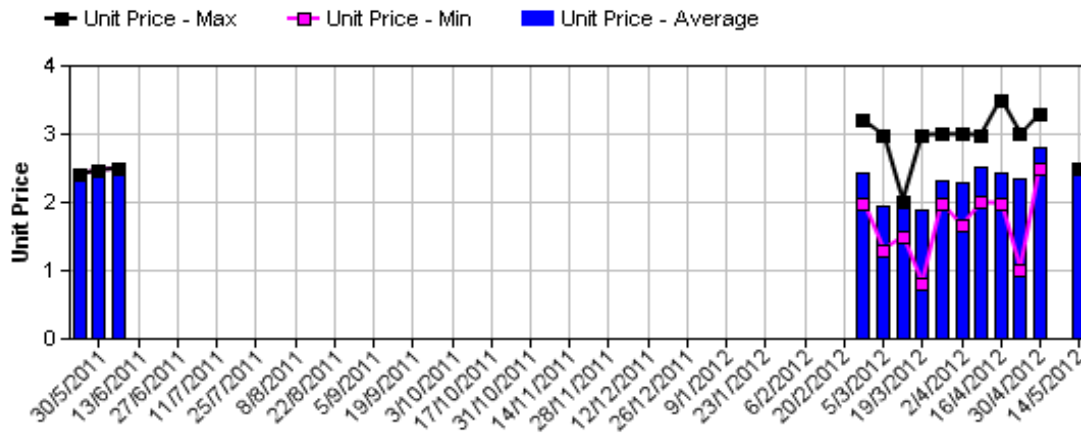
Shepard Avocado Average Retail Prices - Sydney



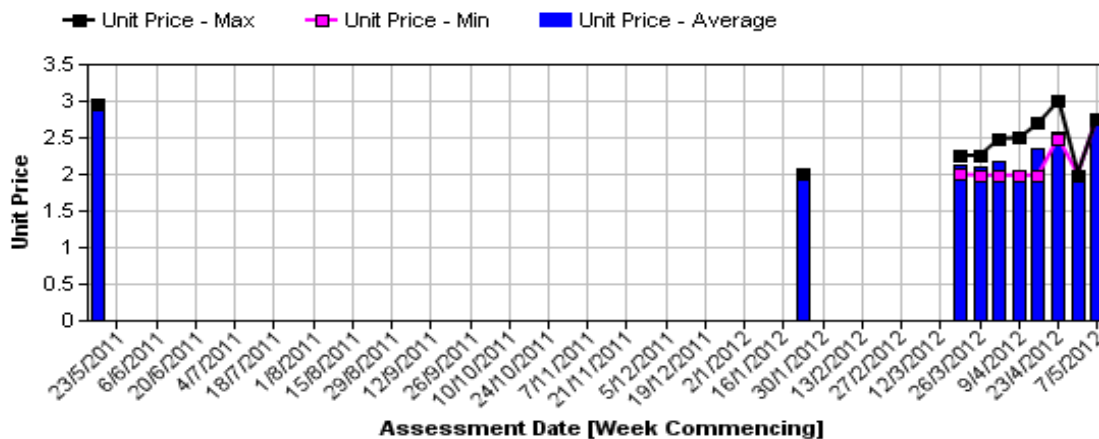
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety - 14th May 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
Coles	Hass	250	1.30	Cat	Aus
Coles	Hass	280	1.30	Cat	Aus
Coles	Hass	240	1.30	Cat	Aus
IGA	Hass	235	1.99	Store	Aus
Woolworths	Hass	265	2.48	No	Aus
Woolworths	Hass	280	2.48	Store	Aus
Woolworths	Hass	260	2.48	Store	Aus
I	Hass	245	2.69	No	Aus
IGA	Hass	280	2.96	No	Aus
I	Shepard	300	2.99	No	Aus
I	Hass	275	2.99	No	Aus
I	Shepard	280	2.99	No	Aus
Foodworks	Hass	275	2.99	No	Aus
I	Hass	310	2.99	No	Aus
I	Hass	275	2.99	No	Aus
I	Shepard	300	2.99	No	Aus
BRISBANE					
Woolworths	Hass	210	0.50	Store	Aus
IGA	Hass	190	0.89	Store	Aus
IGA	Hass	175	0.89	Store	Aus
I	Hass	240	0.99	Store	Aus
IGA	Hass	180	1.29	Store	Aus
I	Hass	275	1.49	Store	Aus
I	Shepard	460	1.69	Store	Aus
I	Hass	310	1.90	Store	Aus
Woolworths	Hass	285	1.94	Store	Aus
Woolworths	Hass	245	1.94	No	Aus
Woolworths	Shepard	285	1.94	No	Aus
Coles	Hass	260	1.98	No	Aus
Coles	Hass	200	1.98	No	Aus
Coles	Hass	240	1.98	No	Aus
I	Hass	205	1.99	Store	Aus
I	Shepard	185	1.99	Store	Aus
I	Hass	220	1.99	No	NS
I	Shepard	275	2.49	Store	Aus
I	Shepard	340	2.49	Store	Aus
I	Hass	280	2.99	Store	Aus
I	Shepard	325	2.99	Store	Aus
I	Hass	305	3.49	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	225	0.99	No	NS
Safeway	Hass	265	1.98	Cat	Aus
Coles	Hass	300	1.98	No	Aus
Safeway	Hass	290	1.98	Cat	Aus
Coles	Hass	270	1.98	No	Aus
Safeway	Hass	290	1.98	Cat	Aus
I	Hass	295	2.19	No	NS
I	Hass	285	2.29	No	NS
I	Hass	245	2.40	No	Aus
I	Hass	255	2.47	No	NS
I	Shepard	265	2.48	Store	Aus
IS	Hass	260	2.49	No	Aus
I	Hass	270	2.98	No	Aus
I	Hass	285	2.99	No	NS
I	Hass	255	2.99	No	Aus
IGA	Hass	270	2.99	No	Aus
PERTH					
IS	Hass	125	0.39	Store	Aus
I	Hass	135	0.99	Store	Aus
Coles	Hass	210	1.30	Store	Aus
Coles	Hass	223	1.30	Store	Aus
Coles	Hass	210	1.30	Store	Aus
Woolworths	Hass	192	1.98	No	Aus
Woolworths	Hass	220	1.98	No	Aus
Woolworths	Hass	225	1.98	No	Aus
I	Hass	225	1.99	Store	Aus
IGA	Hass	260	2.49	No	Aus
I	Hass	245	2.49	No	Aus
IGA	Hass	220	2.69	No	Aus
IGA	Hass	190	2.75	No	Aus
I	Hass	295	2.79	Store	Aus
IGA	Hass	280	2.99	No	Aus
I	Hass	290	3.49	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