



INFOCADO WEEKLY REPORT: 18th May — 24th May 2013 (Wk 21)



Comments

- Dispatches were down on what was forecast for this week. Low prices in the wholesale market may have caused some growers to hold back on picking fruit. There is also a lot of small fruit going into the market which impacts on overall volumes. Retail prices are still quite high, especially in Sydney which doesn't help to move the high volumes.
- Again, please note the high volume of bulk boxes dispatched this week compared with what was forecast (it was forecast that bulk boxes would make up around 11% of the total but bulk boxes made up approximately 20% of dispatches). If you are expecting a continued high proportion of small fruit/bulk boxes please be sure to allocate it correctly in your weekly forecast forms.
- Australian avocado exports were valued at \$8.54 million for the 12 months to March 2013. Main export destinations were Singapore (42%), Thailand (25%), Malaysia (12%), UAE (9%) and Hong Kong (8%). Avocado exports in the 2013 March quarter however decreased in volume compared with 2012 although overall value was still up by 4% for that quarter due to higher prices (\$3.64/kg 2012 vs \$4.51/kg 2013). These higher price points have impacted on trade to the Middle East with almost no trade to the UAE in the March quarter.

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What you need to be aware of for next month

- During the coming month there will be continuous advertising on the recipe website Taste.com and its mobile phone app.
- Australian Avocados Facebook Page has 63,000 (and growing) facebook fans. 2-3 posts a week are made on the page using relevant and timely content. For example when a chocolate avocado dipping sauce and churros was featured on the My Kitchen Rules TV program, the next day it was posted on the Australian Avocados Facebook Page.
- Over the coming months Restaurant Masterclasses will be held in Melbourne, Sydney and Brisbane targeting restaurant chefs.
- According to the April 2013 Quarterly Report 1,161,191 5.5kg eqv trays are expected in the market place for June. Of that total 1,085,528 5.5kg eqv trays are Hass.

Upcoming Holidays

WA Foundation Day: 3 June | Queens Birthday (all states except WA): 10 June

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IMPORTANT and PLEASE NOTE:

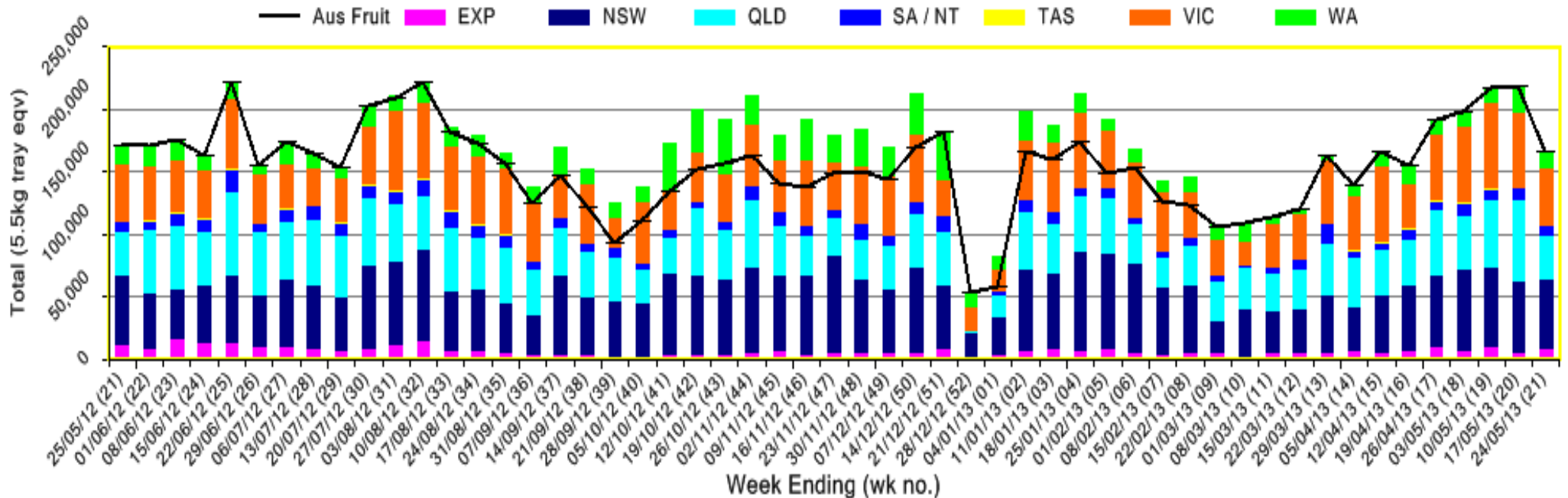
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 18th May - 24th May 2013 (Wk 21)

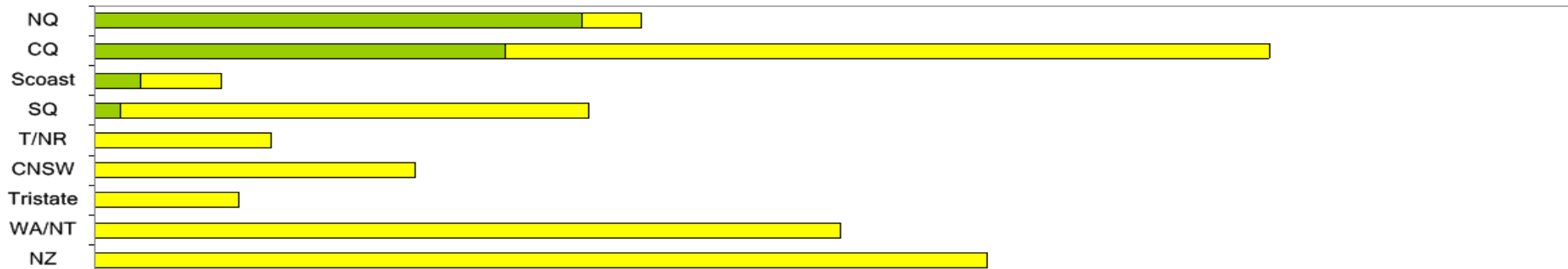
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total	
EXP		10						1,870	4,995	6,875	727	600		8,306	
NSW		364	2,693	5,098	908	6,113	5,701	2,497	1,620	24,994	16,067	3,360		54,818	
QLD	35	233	1,309	3,182	170	3,022	7,778	4,720	972	21,421	6,730	5,004	2,400	35,003	
SA / NT		30	397	793		736	1,914	1,555		5,425	1,278	720		7,880	
TAS								289	320	609	288			1,133	
VIC	39	2,076	4,547	9,900	243	9,325	5,267	2,099	569	34,065	5,126	10,560		45,305	
WA		2	200	621		817	4,196	1,977	320	8,133	2,967			13,528	
Total	74	2,715	9,146	19,594	1,321	20,013	25,145	15,038	8,476	101,522	33,183	20,244	2,400	165,972	

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 3,389,609 5.5kg tray eqv

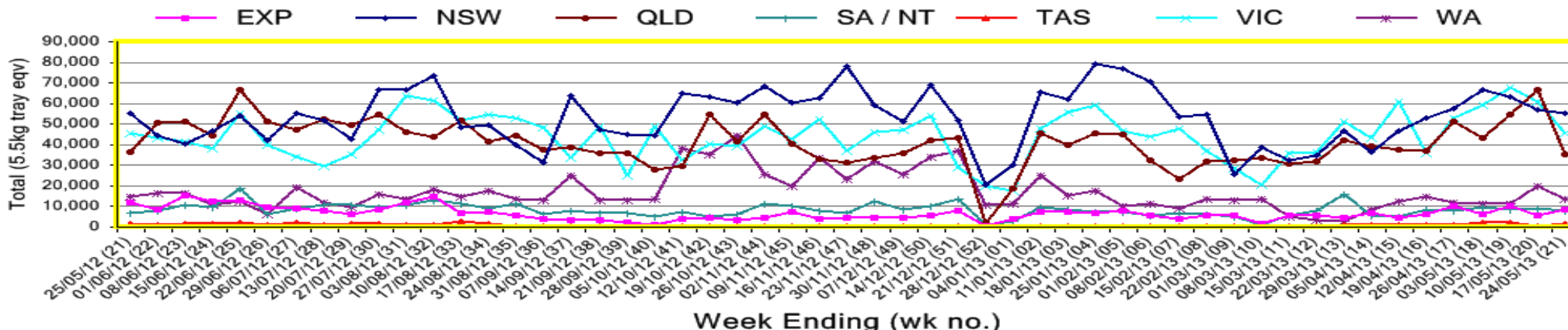


Percentage dispatched by region (Based on seasonal forecast - 2013)

■ 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 2013 to date = 3,389,609 5.5kg tray eqv



Week 21 contributors - Packhouses

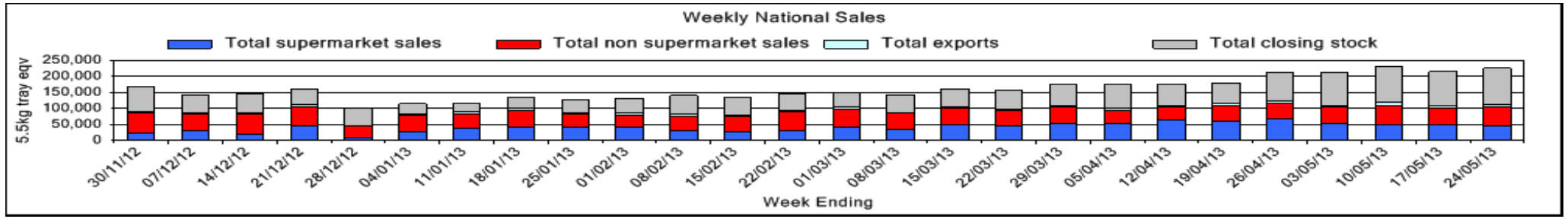
- Avocado Estates
- B & F Sanderson Farming
- Balmoral Orchard
- Battistin Orchards Pty Ltd
- Donovan Family Investment Trust
- G & C Christensen
- G & J Krenske
- Googa Farms
- Lava Valley Produce
- Natures Fruit Company
- One Harvest
- R & M Waterman
- Simpson Farms Pty Ltd
- Sunfresh
- Sunny Bluff Produce Pty Ltd
- Sunnyspot Packhouse Pty Ltd
- SuperPak
- The Avolution
- Touchwood Farming
- Tropicado Avocados

Week 21 contributors - Wholesalers

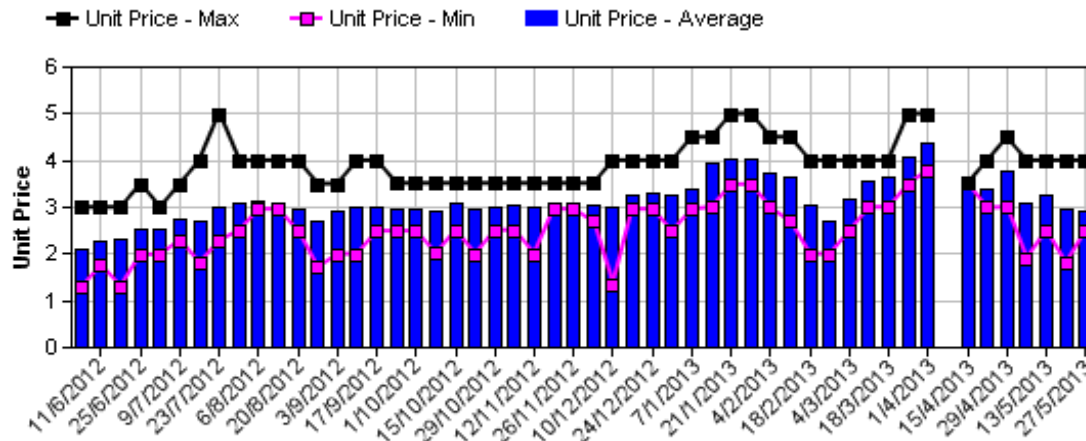
- Allcrops Pty Ltd (Sydney)
- C & S Ponte Produce Pty Ltd (Melbourne)
- Costa Farms (Adelaide)
- Costa Farms (Brisbane)
- Costa Farms (Melbourne)
- Costa Farms (Perth)
- Dykes Bros (Melbourne)
- Etherington (Perth)
- Exotic Fruit Traders (Sydney)
- Fresh Choice WA Pty Ltd (Perth)
- Fresh Express Produce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

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

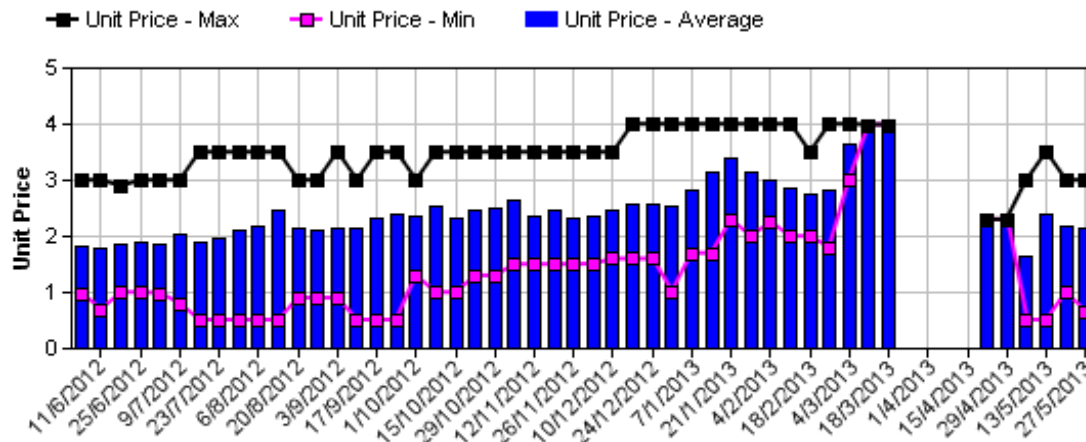
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	5,472	366		5,838		283		283	515	3,360			3,360	611	6,083	881		6,963
Total non supermarket sales	5,657	71	1,026	6,754	2,473		156	2,629	4,780						10,153	71	1,310	11,534
Total exports																		
Total sales	11,129	437	1,026	12,592	2,473	283	156	2,912	5,295	3,360			3,360	611	16,236	952	1,310	18,497
Total Stock on Hand	3,835		97	3,932	3,341			3,341	6,075						9,910		97	10,007
QLD																		
Total supermarket sales	16,621			16,621	710			710	1,291	4,320			4,320	785	18,697			18,697
Total non supermarket sales	13,824	2,959		16,783	1,981	880		2,861	5,202						17,426	4,559		21,985
Total exports	6,875			6,875	727			727	1,322	600			600	109	8,306			8,306
Total sales	37,320	2,959		40,279	3,418	880		4,298	7,815	4,920			4,920	895	44,429	4,559		48,988
Total Stock on Hand	30,773	3,563	293	34,629	2,649	195	25	2,869	5,216						35,589	3,918	338	39,845
SA & TAS																		
Total supermarket sales	7,333			7,333						720			720	131	7,464			7,464
Total non supermarket sales	3,176	146		3,322	645	36		681	1,238						4,349	211		4,560
Total exports																		
Total sales	10,509	146		10,655	645	36		681	1,238	720			720	131	11,813	211		12,024
Total Stock on Hand	14,209	22		14,231	2,789			2,789	5,071						19,280	22		19,302
VIC																		
Total supermarket sales	7,865			7,865						10,560			10,560	1,920	9,785			9,785
Total non supermarket sales	6,827	844	1,781	9,452	2,072	146	817	3,035	5,518						10,594	1,110	3,266	14,970
Total exports																		
Total sales	14,692	844	1,781	17,317	2,072	146	817	3,035	5,518	10,560			10,560	1,920	20,379	1,110	3,266	24,755
Total Stock on Hand	14,409	2,099	1,207	17,715	4,369	2,636	316	7,321	13,311						22,353	6,892	1,781	31,026
WA																		
Total supermarket sales	2,796			2,796	40			40	73						2,869			2,869
Total non supermarket sales	3,583			3,583	1,375			1,375	2,500						6,083			6,083
Total exports																		
Total sales	6,379			6,379	1,415			1,415	2,573						8,952			8,952
Total Stock on Hand	4,774			4,774	4,468			4,468	8,124						12,898			12,898
Total																		
Total supermarket sales	40,087	366		40,453	750	283		1,033	1,878	18,960			18,960	3,447	44,898	881		45,778
Total non supermarket sales	33,067	4,020	2,807	39,894	8,546	1,062	973	10,581	19,238						48,605	5,951	4,576	59,132
Total exports	6,875			6,875	727			727	1,322	600			600	109	8,306			8,306
Total sales	80,029	4,386	2,807	87,222	10,023	1,345	973	12,341	22,438	19,560			19,560	3,556	101,809	6,832	4,576	113,217
Total Stock on Hand	68,000	5,684	1,597	75,281	17,616	2,831	341	20,788	37,796						100,029	10,831	2,217	113,077



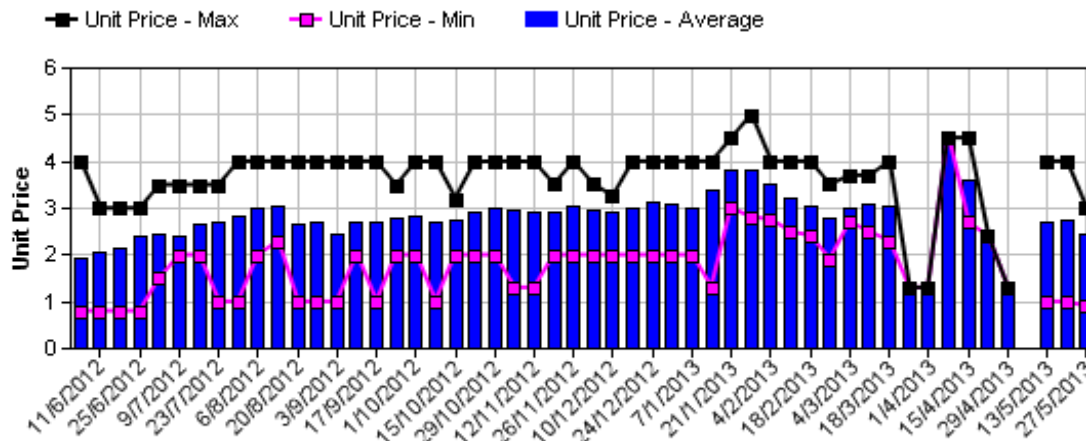
Hass Avocado Average Retail Prices - Sydney



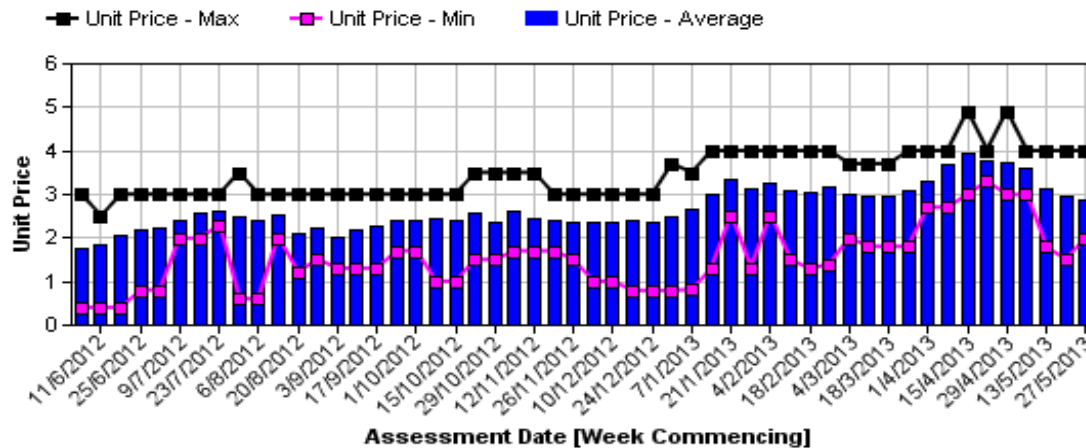
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

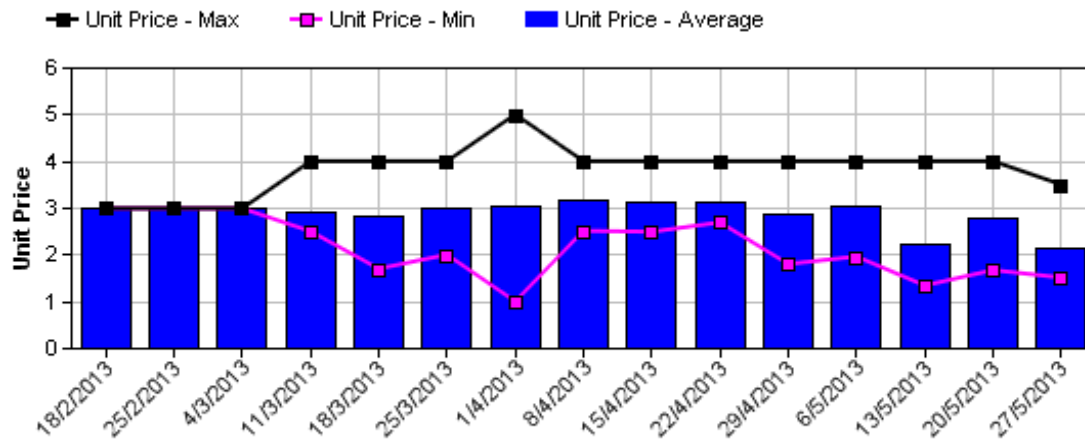


Hass Avocado Average Retail Prices - Perth

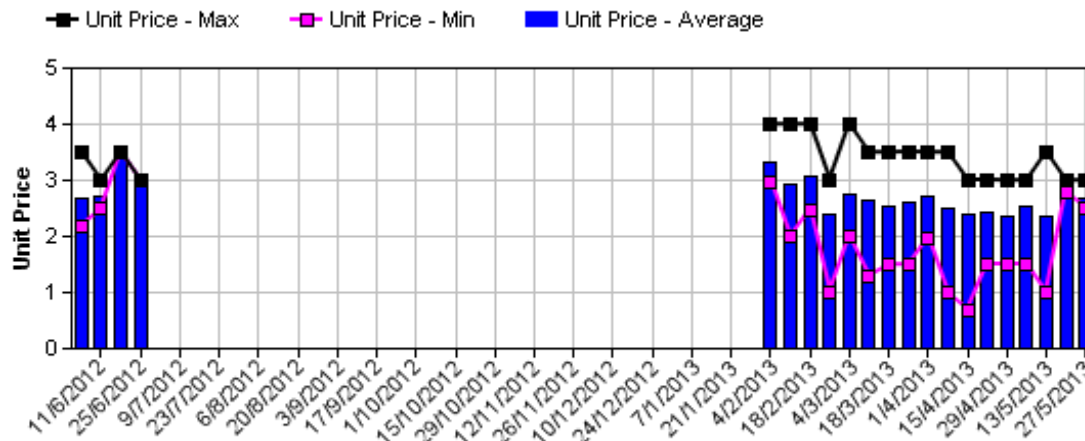


Assessment Date [Week Commencing]

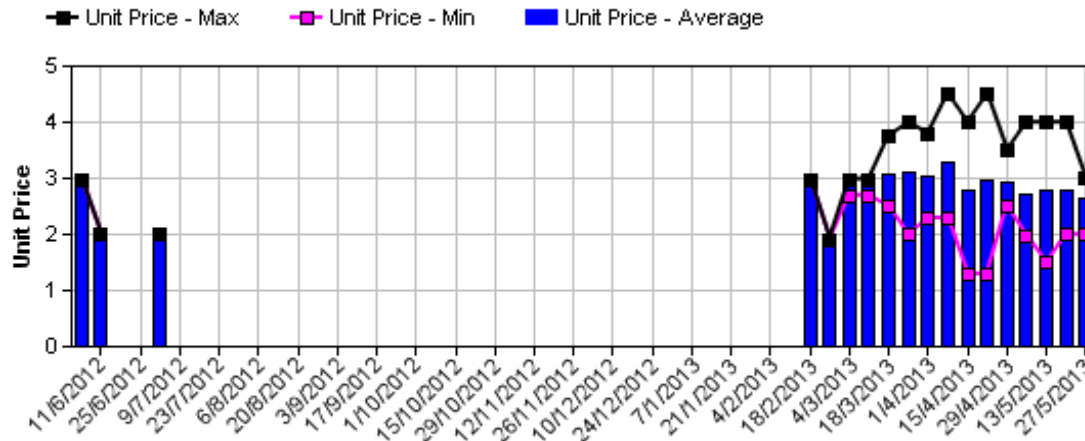
Shepard Avocado Average Retail Prices - Sydney



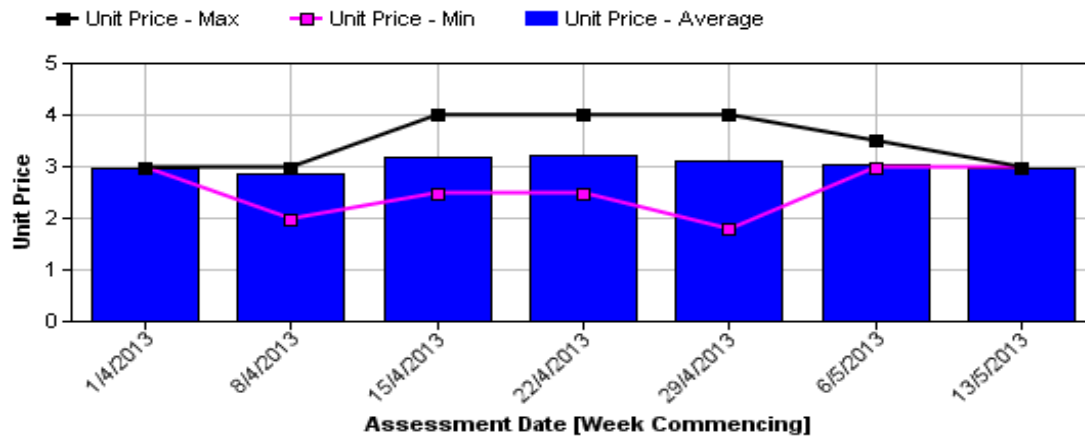
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety - 27th May 2013

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
I	Shepard	170	1.50	Store	Aus	I	Hass	125	0.89	Store	NS
I	Shepard	220	1.66	No	Aus	I	Hass	170	1.00	Store	NS
IGA	Shepard	180	1.95	No	Aus	I	Hass	230	1.79	Store	NS
Woolworths	Hass	260	2.48	Store	Aus	I	Hass	230	1.90	No	Aus
Woolworths	Hass	290	2.48	No	Aus	IS	Hass	230	1.99	No	Aus
Coles	Hass	260	2.48	Cat	Aus	I	Shepard	245	1.99	No	NS
Woolworths	Hass	280	2.48	No	Aus	I	Hass	240	2.48	No	Aus
Coles	Hass	260	2.48	Cat	Aus	I	Shepard	235	2.55	No	Aus
Coles	Hass	280	2.48	Cat	Aus	I	Shepard	260	2.69	No	NS
IGA	Hass	280	2.95	No	Aus	I	Hass	270	2.90	No	NS
I	Hass	260	2.99	No	Aus	Safeway	Hass	300	2.98	No	Aus
I	Hass	250	2.99	No	Aus	Coles	Hass	265	2.98	Cat	Aus
Foodworks	Hass	290	2.99	No	Aus	Safeway	Hass	240	2.98	No	Aus
I	Hass	270	2.99	No	Aus	Coles	Hass	275	2.98	Cat	Aus
IGA	Hass	190	2.99	No	Aus	Coles	Hass	225	2.98	Cat	Aus
I	Shepard	310	3.49	No	Aus	Safeway	Hass	255	2.98	No	Aus
I	Hass	330	3.99	No	Aus	I	Hass	250	2.99	No	Aus
I	Hass	290	3.99	No	Aus	IGA	Shepard	260	2.99	No	Aus
BRISBANE						I	Hass	270	2.99	No	NS
I	Hass	135	0.66	Store	Aus	I	Shepard	285	2.99	No	Aus
IGA	Hass	185	0.79	Store	Aus	PERTH					
I	Hass	205	1.50	Store	Aus	IS	Hass	220	1.99	Store	Aus
IGA	Hass	200	1.69	Store	Aus	Coles	Hass	190	2.48	No	Aus
Woolworths	Hass	220	1.98	No	Aus	I	Hass	285	2.48	No	Aus
Coles	Hass	200	2.48	No	Aus	Coles	Hass	200	2.48	No	Aus
Coles	Hass	220	2.48	No	Aus	Coles	Hass	220	2.48	No	Aus
IGA	Hass	150	2.48	No	Aus	I	Hass	245	2.50	No	Aus
I	Shepard	260	2.50	Store	Aus	Woolworths	Hass	200	2.98	No	Aus
I	Shepard	245	2.50	Store	Aus	Woolworths	Hass	210	2.98	Store	Aus
I	Shepard	265	2.79	No	Aus	Woolworths	Hass	220	2.98	Store	Aus
Coles	Hass	200	2.80	No	Aus	IGA	Hass	275	2.99	No	Aus
Woolworths	Hass	200	2.86	No	Aus	I	Hass	250	2.99	No	Aus
Woolworths	Hass	205	2.86	No	Aus	IGA	Hass	245	2.99	No	Aus
I	Shepard	268	2.99	Store	Aus	IGA	Hass	230	3.19	No	Aus
I	Hass	320	2.99	No	Aus	I	Hass	275	3.69	No	Aus
						I	Hass	255	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

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

Store Codes

I = Independent Fruit and Vegetable stores
 IC = Independent Fruit and Vegetable store Chains
 IS = Independent Supermarkets