



INFOCADO WEEKLY REPORT: 29th June — 5th July 2013 (Wk 27)



Comments

- There are a number of store specials in place across Brisbane and Perth this week as well as Catalogue Specials for Coles stores in Queensland. Prices peaked at \$4.49 at an independent store in Sydney.
- Reports from the markets indicate prices appear to be holding steady at the moment and few quality issues have been reported.
- The June seasonal forecast forms are due back ASAP! The sooner we get this information the sooner we can publish the July Quarterly Report with a full year forecast. If you are having issues submitting your forecast please contact Avocados Australia.

[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](#)

What you need to be aware of for next month

The Winter edition of Talking Avocados will be available in July and includes an update on the Australian Avocado's new strategic marketing plan. Some key points are included below, but please check out the full article when you receive Talking Avocados.

- Extensive consumer research was conducted in 2012 and these findings have driven the new three year marketing plan which begins in July.
- Avocado buyers have been segmented based off their behaviours and attitudes. Importantly this has identified a group of people across all life stages who's passion for avocados sets them apart. They account for 2/3 of purchases already and research showed that they, out of all consumer segments were most likely to purchase more. This is a key opportunity.
- Except for the above mentioned passionate consumers, most other buyers still lack confidence around the fundamentals of choosing, handling and ripening avocados. Consumer focused education around these points is necessary to improve buyer confidence.
- Price continues to be a barrier to purchase. 2/3 of buyers have at some point deferred purchase based on price. 40% of buyers say that avocados are too expensive at \$2.50. This provides an opportunity to enhance perceived value for the consumer. The new marketing strategy is therefore designed to drive a "value" perception that enables everyday consumption, with less price sensitivity.

Upcoming Holidays

WA Queen's Birthday: 30 September

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IMPORTANT and PLEASE NOTE:

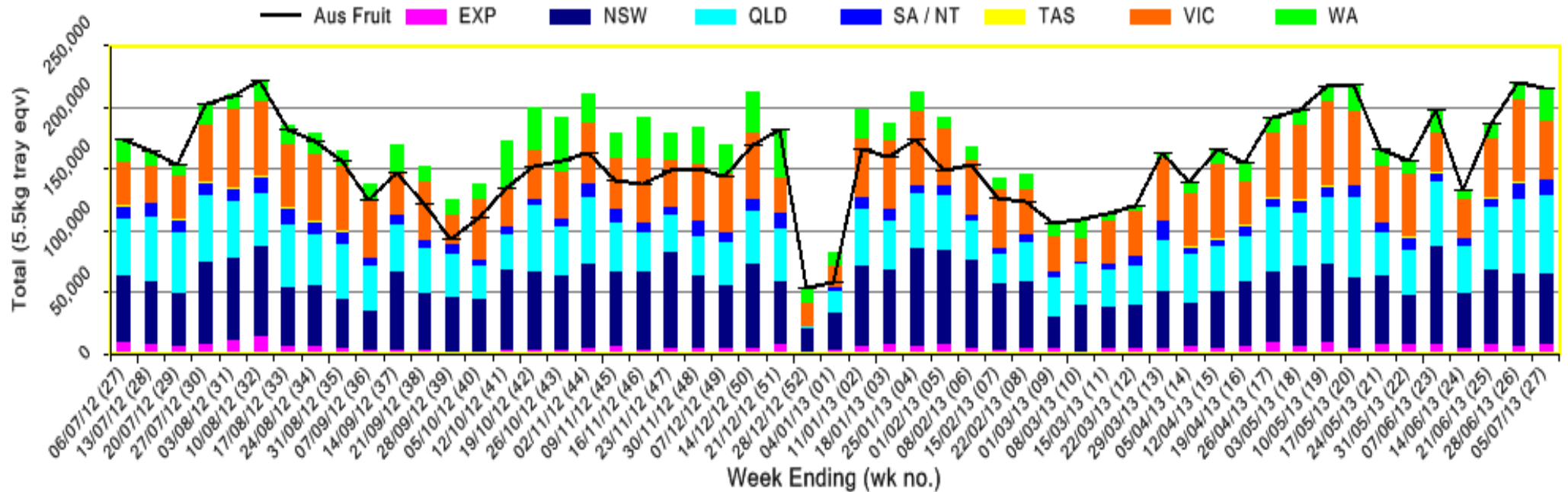
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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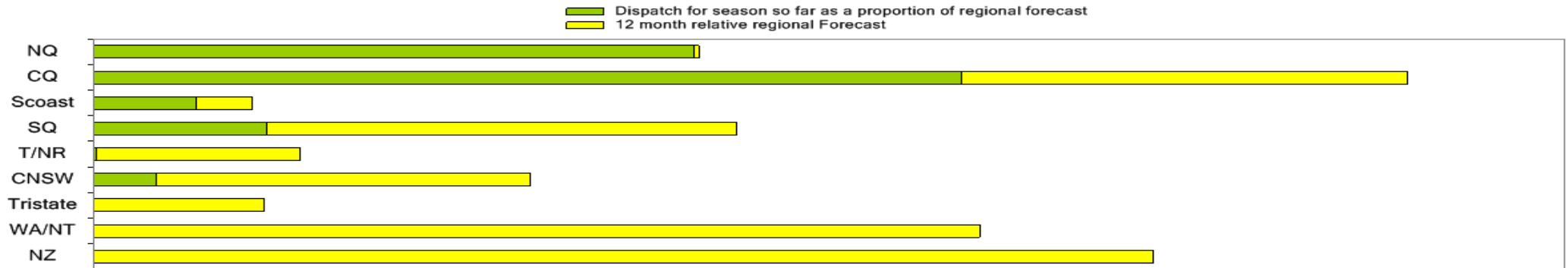
Industry Dispatches By Destination State and Count Size : 29th June - 5th July 2013 (Wk 27)

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									1,257	3,811		600		8,784
NSW	35	1,590	2,279	7,633	2,264	5,833	5,449	3,345	1,591		14,257	618		56,053
QLD	19	660	2,404	6,013	315	4,558	10,622	5,974	1,437		16,581	2,052	8,800	64,122
SA / NT	4	134	976	3,562		1,013	885	3,109	160		1,133	480		11,990
TAS									480		192			829
VIC	227	1,025	3,775	8,824	523	5,286	6,754	3,155	555		9,500	3,048		47,951
WA		413	449	1,115		1,972	4,415	2,382			7,424			24,244
Total	285	3,822	9,883	27,147	3,102	18,662	28,605	19,222	7,554	118,282	51,071	6,798	8,800	213,974

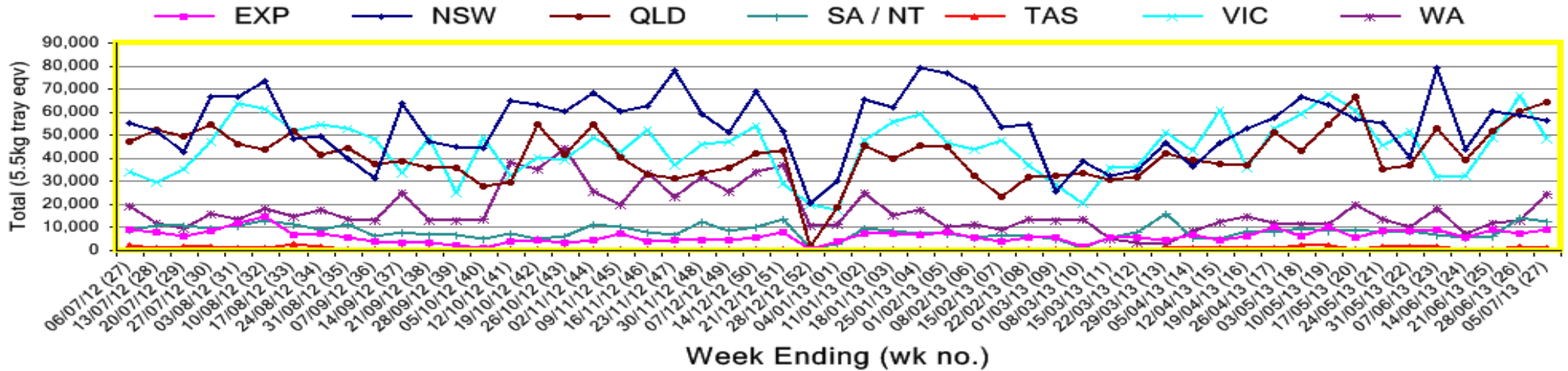
Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 4,495,555 5.5kg tray eqv



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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 4,495,555 5.5kg tray eqv



Week 27 contributors - Packhouses

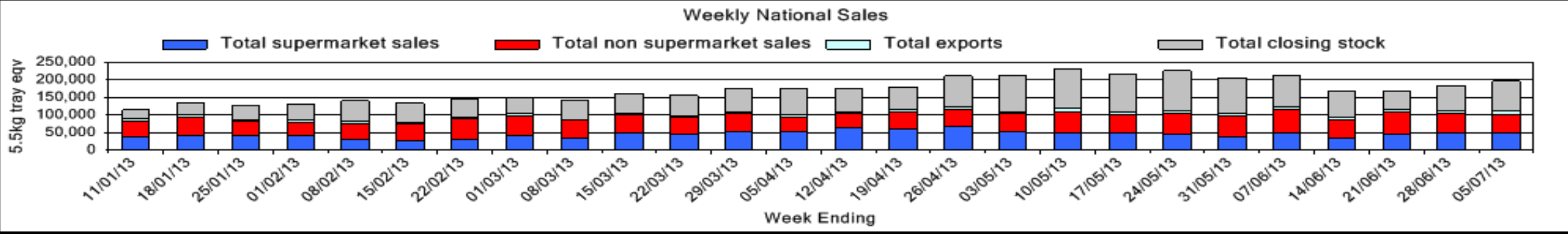
Balmoral Orchard	Simpson Farms Pty Ltd (Goodwood Home)
Donovan Family Investment Trust	Sunfresh
G & J Krenske	Sunny Bluff Produce Pty Ltd
Green Nugget Orchards	Sunnyspot Packhouse Pty Ltd
Lava Valley Produce	SuperPak
Mountain Fresh	The Avolution
Natures Fruit Company	Touchwood Farming
One Harvest	

Week 27 contributors - Wholesalers

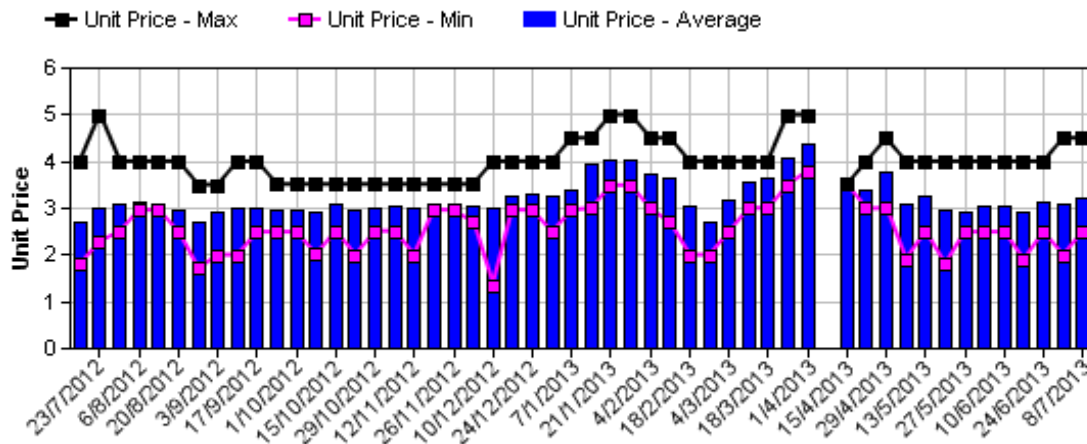
C & S Ponte Produce Pty Ltd (Melbourne)	Fresh Express Produce Pty Ltd (Perth)
Costa Farms (Adelaide)	Murray Bros (Brisbane)
Costa Farms (Brisbane)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Melbourne)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Perth)	The La Manna Group (Adelaide)
Dykes Bros (Melbourne)	The La Manna Group (Brisbane)
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

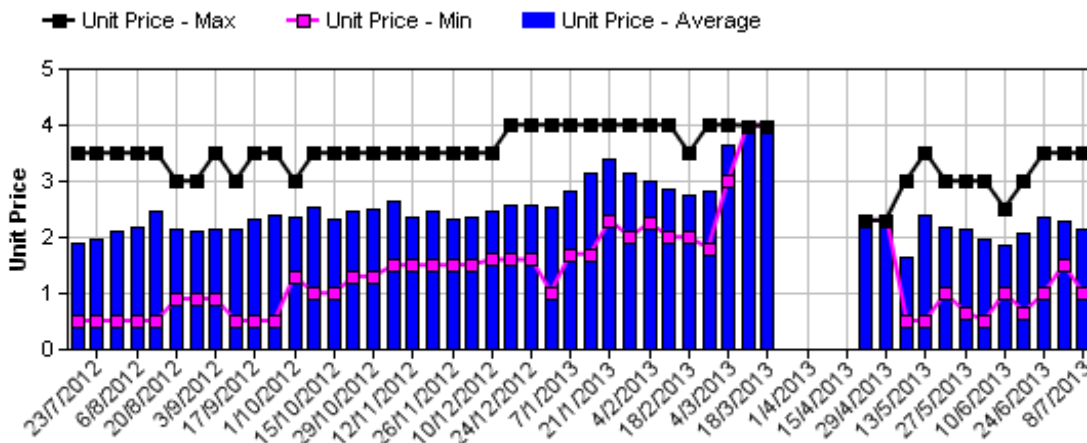
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Not enough NSW wholesalers contributed data this week.																	
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	8,655		23	8,678	2,208			2,208	4,015	480			480	87	12,757		23	12,780
Total Stock on Hand																		
QLD																		
Total supermarket sales	15,420			15,420	4,802			4,802	8,731						24,151			24,151
Total non supermarket sales	13,535			13,535	1,855			1,855	3,373						16,908			16,908
Total exports	5,068			5,068	1,984			1,984	3,607	600			600	109	8,784			8,784
Total sales	34,023			34,023	8,641			8,641	15,711	600			600	109	49,843			49,843
Total Stock on Hand	26,216			26,216	1,391			1,391	2,529						28,745			28,745
SA & TAS																		
Total supermarket sales	9,256			9,256						480			480	87	9,343			9,343
Total non supermarket sales	2,820			2,820	674			674	1,225						4,045			4,045
Total exports																		
Total sales	12,076			12,076	674			674	1,225	480			480	87	13,389			13,389
Total Stock on Hand	10,038			10,038	2,368			2,368	4,305						14,343			14,343
VIC																		
Total supermarket sales	8,120			8,120											8,120			8,120
Total non supermarket sales	6,095		3,395	9,490	4,740		279	5,019	9,125	258			258	47	14,760		3,903	18,663
Total exports																		
Total sales	14,215		3,395	17,610	4,740		279	5,019	9,125	258			258	47	22,880		3,903	26,783
Total Stock on Hand	16,548	6	4,933	21,487	6,570	850	1,407	8,827	16,049	108			108	20	28,513	1,552	7,491	37,555
WA																		
Total supermarket sales	2,704			2,704											2,704			2,704
Total non supermarket sales	3,614		34	3,648	1,186		98	1,284	2,335						5,770		212	5,983
Total exports																		
Total sales	6,318		34	6,352	1,186		98	1,284	2,335						8,474		212	8,687
Total Stock on Hand	2,583		8	2,591	712			712	1,295						3,878		8	3,886
Total																		
Total supermarket sales	41,156			41,156	4,994			4,994	9,080	960			960	175	50,411			50,411
Total non supermarket sales	29,063		3,452	32,515	10,471		377	10,848	19,724	258			258	47	48,148		4,138	52,286
Total exports	5,068			5,068	1,984			1,984	3,607	600			600	109	8,784			8,784
Total sales	75,287		3,452	78,739	17,449		377	17,826	32,411	1,818			1,818	331	107,343		4,138	111,481
Total Stock on Hand	56,139	6	4,941	61,086	11,329	850	1,407	13,586	24,702	108			108	20	76,756	1,552	7,499	85,807



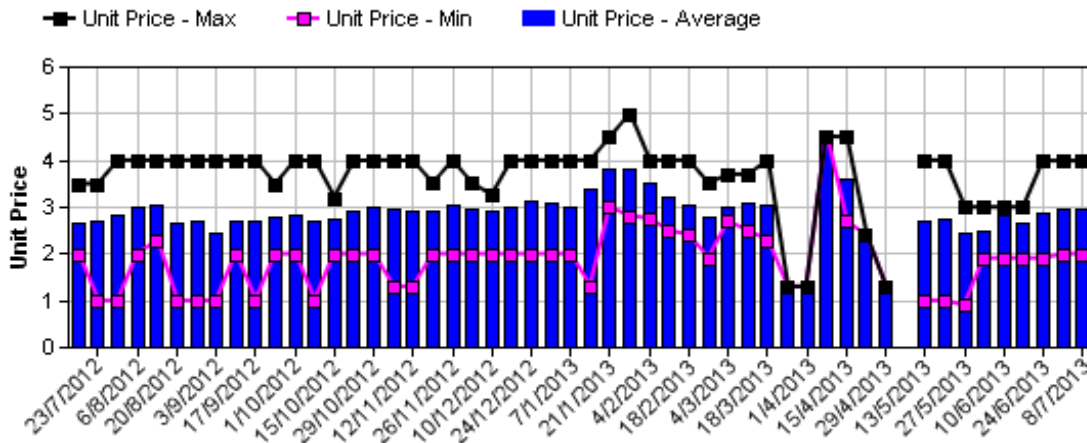
Hass Avocado Average Retail Prices - Sydney



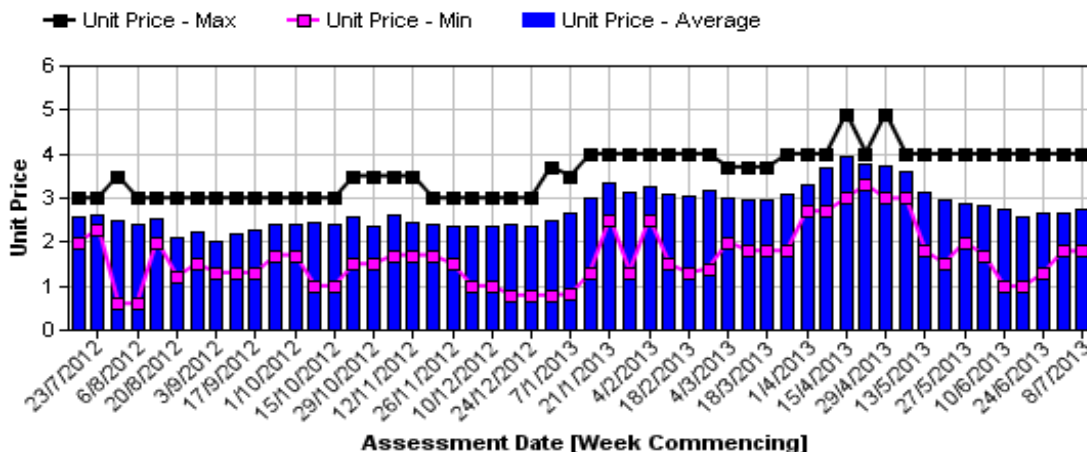
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

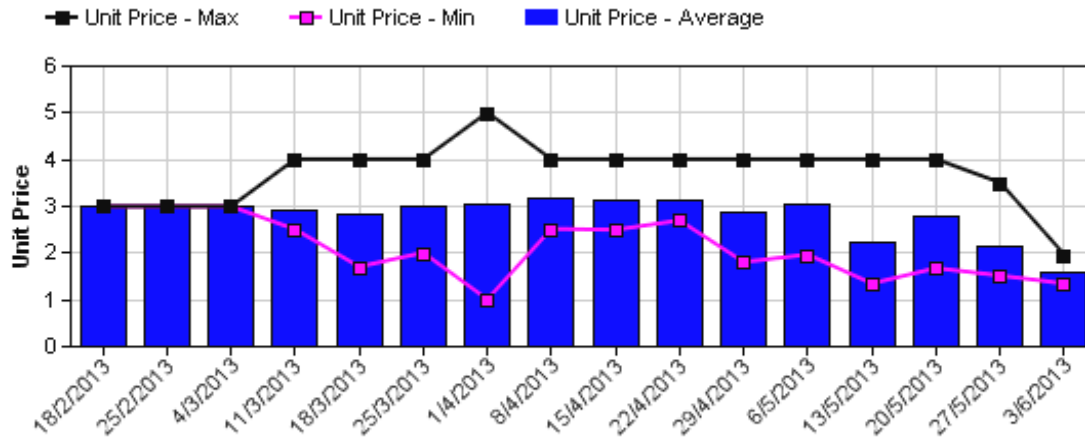


Hass Avocado Average Retail Prices - Perth

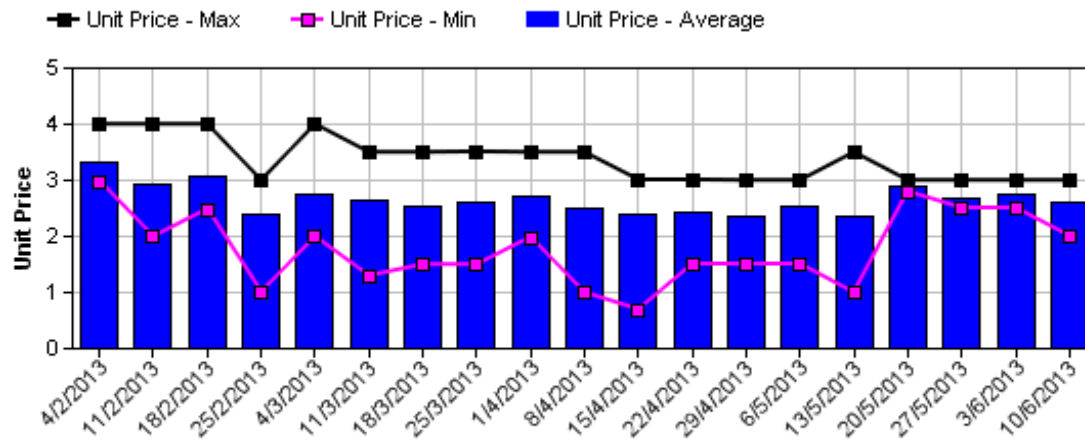


Assessment Date [Week Commencing]

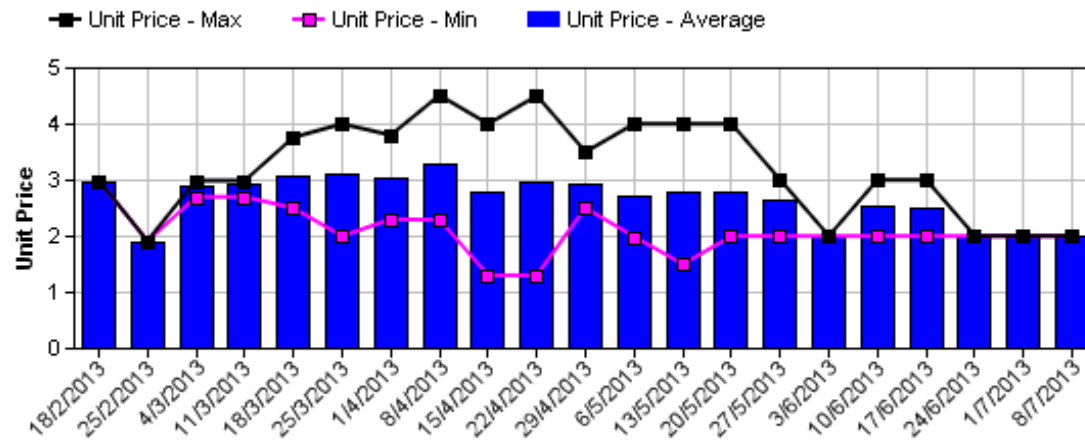
Shepard Avocado Average Retail Prices - Sydney



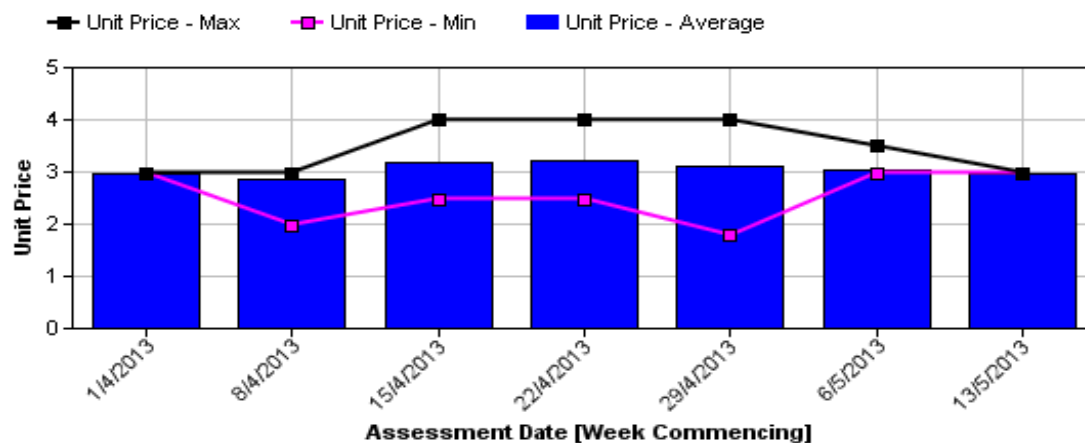
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety - 8th July 2013

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
IGA	Hass	200	2.49	No	Aus
IGA	Hass	280	2.95	No	Aus
Coles	Hass	270	2.98	No	Aus
Coles	Hass	270	2.98	No	Aus
Woolworths	Hass	250	2.98	No	Aus
Coles	Hass	280	2.98	No	Aus
Woolworths	Hass	270	2.98	No	Aus
Woolworths	Hass	280	2.98	No	Aus
Foodworks	Hass	280	2.99	No	Aus
I	Hass	260	2.99	No	Aus
I	Hass	260	2.99	No	Aus
I	Hass	250	2.99	No	Aus
I	Hass	310	3.99	No	Aus
I	Hass	320	3.99	No	Aus
I	Hass	310	3.99	No	Aus
I	Hass	290	4.49	No	Aus
BRISBANE					
I	Hass	165	0.99	Store	Aus
I	Hass	140	1.50	Store	Aus
IGA	Hass	175	1.79	Store	Aus
I	Wurtz	220	1.79	Store	Aus
Woolworths	Hass	180	1.98	No	Aus
I	Hass	215	1.99	No	Aus
I	Hass	220	1.99	No	Aus
Coles	Hass	240	2.00	Cat	Aus
Coles	Hass	200	2.00	Cat	Aus
IGA	Hass	190	2.48	No	Aus
Woolworths	Hass	205	2.48	No	Aus
Woolworths	Hass	215	2.48	Store	Aus
Coles	Hass	220	2.48	Cat	Aus
I	Hass	218	2.50	Store	Aus
I	Hass	330	3.49	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	255	1.99	No	NS
I	Shepard	265	1.99	No	NS
I	Hass	230	2.69	No	NS
Coles	Hass	195	2.98	No	Aus
Coles	Hass	260	2.98	No	Aus
Safeway	Hass	220	2.98	No	Aus
Safeway	Hass	270	2.98	No	Aus
Safeway	Hass	225	2.98	No	NS
Coles	Hass	210	2.98	No	Aus
I	Hass	290	2.99	No	Aus
I	Hass	275	2.99	No	NS
I	Hass	280	2.99	No	NS
IS	Hass	225	2.99	No	Aus
IGA	Hass	265	2.99	No	Aus
I	Hass	280	3.98	No	NS
PERTH					
I	Hass	200	1.78	No	Aus
IS	Hass	220	1.99	Store	Aus
I	Hass	205	1.99	No	Aus
Coles	Hass	190	2.48	No	Aus
Coles	Hass	220	2.48	No	Aus
Coles	Hass	225	2.48	No	Aus
IGA	Hass	250	2.69	No	Aus
IGA	Hass	280	2.79	No	Aus
Woolworths	Hass	205	2.98	No	Aus
Woolworths	Hass	200	2.98	Store	Aus
Woolworths	Hass	200	2.98	Store	Aus
I	Hass	260	2.99	No	Aus
I	Hass	260	2.99	No	Aus
IGA	Hass	260	2.99	No	Aus
I	Hass	290	3.30	No	Aus
IGA	Hass	280	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