



## INFOCADO WEEKLY REPORT: 6th July — 12th July 2013 (Wk 28)



### Comments

- An updated New Zealand forecast can be seen on page 3 of this report. The forecast has increased by 525,520 5.5kg eqv trays and fruit is expected to begin arriving in Australia in September.
- Updated seasonal forecasts from most Western Australian suppliers indicate that dispatches will be increasing from September onwards.
- Unfortunately no retail prices were able to be collected from Sydney this week due to unforeseen circumstances. Retail prices peaked in Perth and Melbourne at just under \$4.
- The cooler, overcast weather across Queensland has slowed sales and rain events have hampered harvesting in some regions.
- The July Quarterly Report will be published shortly. Final forecasts are being gathered this week.

[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

### 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:

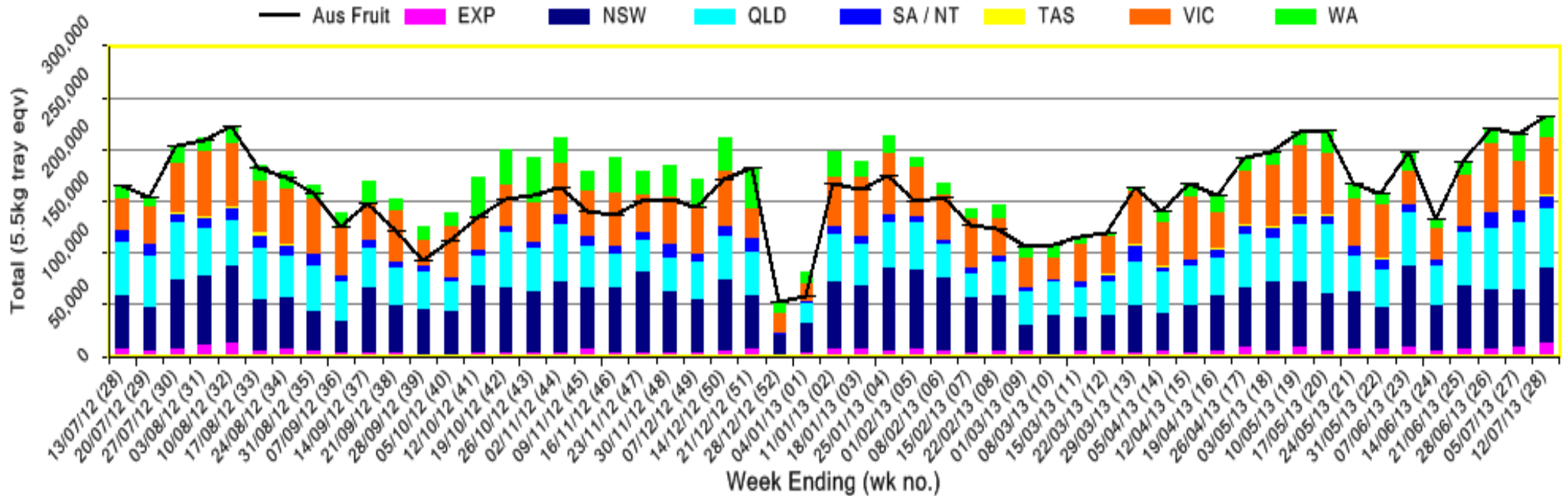
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 6th July - 12th July 2013 (Wk 28)**

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	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP								2,754	5,546	8,300	2,263	660			12,535
NSW	105	1,797	4,058	9,507	2,561	8,441	5,718	4,310	4,761	41,258	16,482	8,856			72,835
QLD	2	412	1,536	3,865	380	5,296	11,512	9,160	1,452	33,615	10,306	10,772	14,423	1,050	57,125
SA / NT	1	3	790	2,437	115	244	1,937	4,023	64	9,614	1,592	480			12,596
TAS									1,440	1,440	406				2,178
VIC	426	1,686	2,615	6,917	1,731	7,394	6,167	3,603	322	30,861	12,992	2,472			54,932
WA		325	347	1,480		2,969	7,326	1,250	10	13,707	3,257				19,629
<b>Total</b>	<b>534</b>	<b>4,223</b>	<b>9,346</b>	<b>24,206</b>	<b>4,787</b>	<b>24,344</b>	<b>34,100</b>	<b>25,100</b>	<b>12,155</b>	<b>138,795</b>	<b>47,298</b>	<b>23,240</b>	<b>14,423</b>	<b>1,050</b>	<b>231,829</b>

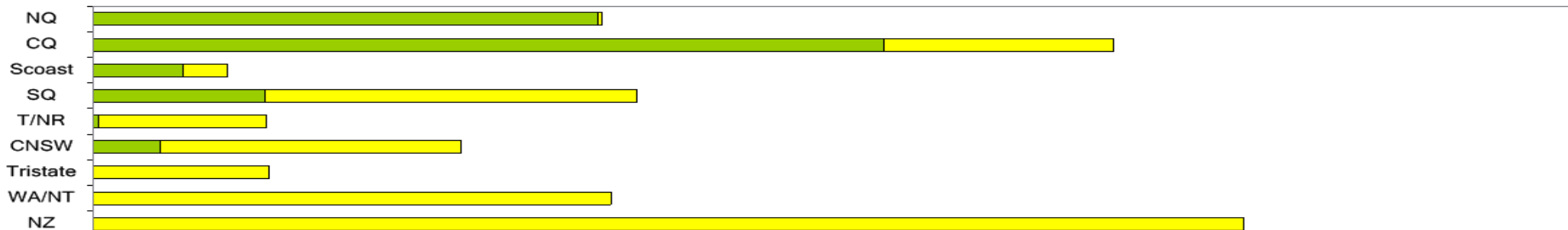
**Throughput Australian & NZ avocados by destination state**  
**Throughput 1st January 2013 to date = 4,727,385 5.5kg tray eqv**



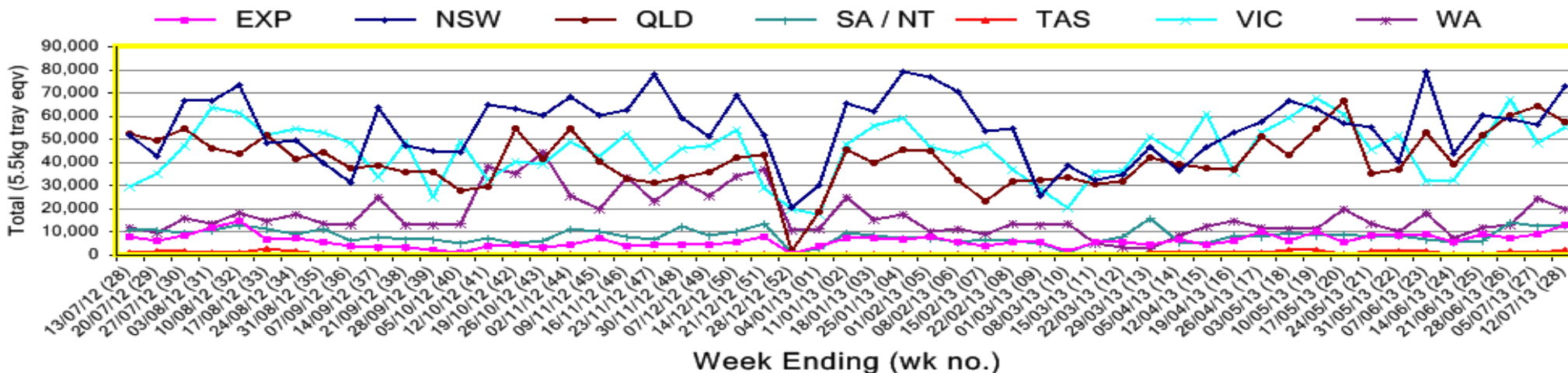


Percentage dispatched by region (Based on seasonal forecast - 2013)

■ 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 = 4,727,385 5.5kg tray eqv



**Week 28 contributors - Packhouses**

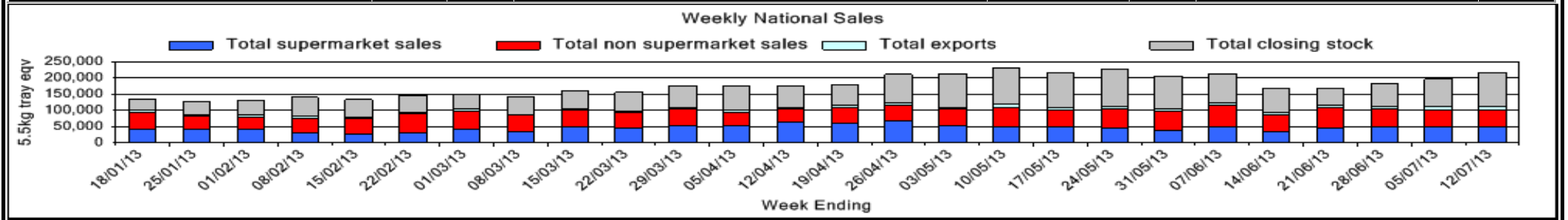
Balmoral Orchard	Perseverance Farming Co
Donovan Family Investment Trust	Simpson Farms Pty Ltd
G & J Krenske	Sunfresh
Googa Farms	Sunny Bluff Produce Pty Ltd
Green Nugget Orchards	Sunnyspot Packhouse Pty Ltd
Lava Valley Produce	SuperPak
Mountain Fresh	The Avolution
Natures Fruit Company	Touchwood Farming
One Harvest	Wodonga Park Fruit and Nuts

**Week 28 contributors - Wholesalers**

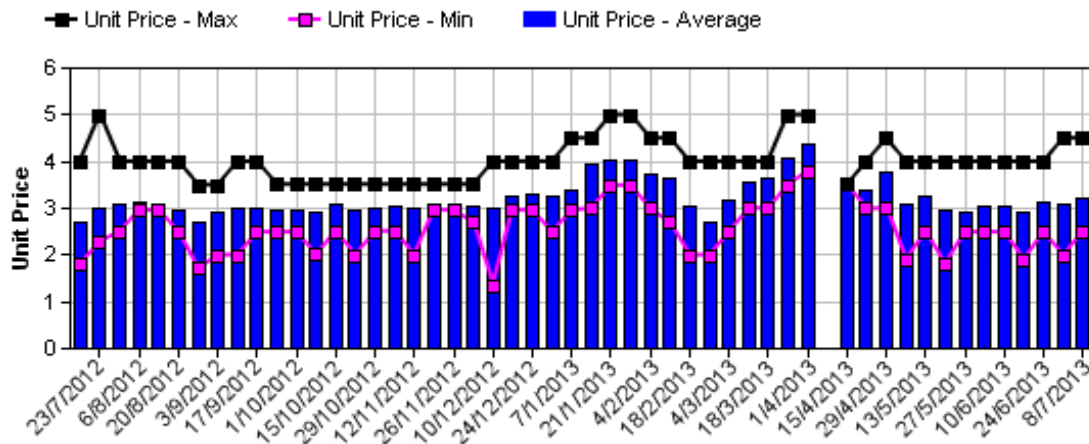
Costa Farms (Adelaide)	Fresh Express Produce Pty Ltd (Perth)
Costa Farms (Brisbane)	Murray Bros (Brisbane)
Costa Farms (Melbourne)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Perth)	Sculli & Co Pty Ltd (Melbourne)
Dykes Bros (Melbourne)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Etherington (Perth)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

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

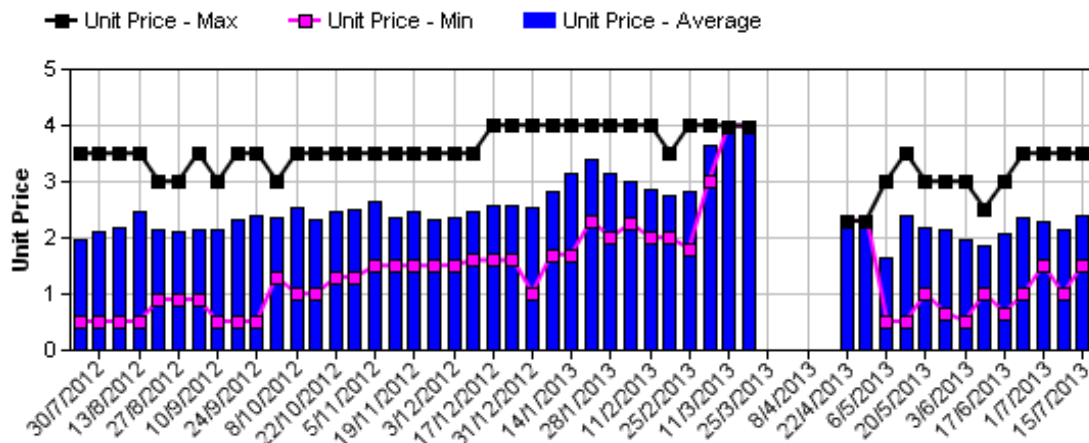
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Not enough NSW wholesalers contributed data this week																	
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	11,232			11,232	1,546			1,546	2,811	8,160			8,160	1,484	15,527			15,527
Total Stock on Hand																		
QLD																		
Total supermarket sales	15,920			15,920	768			768	1,396	2,400			2,400	436	17,753			17,753
Total non supermarket sales	15,054			15,054	2,067			2,067	3,758						18,812			18,812
Total exports	8,300			8,300	2,263			2,263	4,115	660			660	120	12,535			12,535
Total sales	39,274			39,274	5,098			5,098	9,269	3,060			3,060	556	49,099			49,099
Total Stock on Hand	34,004			34,004	1,591			1,591	2,893						36,897			36,897
SA & TAS	Not enough SA wholesalers contributed data this week																	
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	11,162			11,162	629			629	1,144	480			480	87	12,393			12,393
Total Stock on Hand																		
VIC																		
Total supermarket sales	4,711			4,711						2,400			2,400	436	5,147			5,147
Total non supermarket sales	9,706	6	1,645	11,357	2,851	850	62	3,763	6,842	181			181	33	14,922	1,552	1,758	18,232
Total exports																		
Total sales	14,417	6	1,645	16,068	2,851	850	62	3,763	6,842	2,581			2,581	469	20,070	1,552	1,758	23,379
Total Stock on Hand	15,224		5,450	20,674	5,807		2,426	8,233	14,969	77			77	14	25,797		9,860	35,657
WA																		
Total supermarket sales	5,580			5,580	32			32	58						5,638			5,638
Total non supermarket sales	3,847		8	3,855	2,018		64	2,082	3,785						7,516		124	7,640
Total exports																		
Total sales	9,427		8	9,435	2,050		64	2,114	3,844						13,154		124	13,279
Total Stock on Hand	4,113			4,113	4,140			4,140	7,527						11,640			11,640
Total																		
Total supermarket sales	43,806			43,806	992			992	1,804	13,440			13,440	2,444	48,053			48,053
Total non supermarket sales	33,406	6	1,653	35,065	8,919	850	126	9,895	17,991	181			181	33	49,655	1,552	1,882	53,089
Total exports	8,300			8,300	2,263			2,263	4,115	660			660	120	12,535			12,535
Total sales	85,512	6	1,653	87,171	12,174	850	126	13,150	23,909	14,281			14,281	2,597	110,243	1,552	1,882	113,676
Total Stock on Hand	67,313	24	5,450	72,787	15,173		2,426	17,599	31,998	77			77	14	94,915	24	9,860	104,799



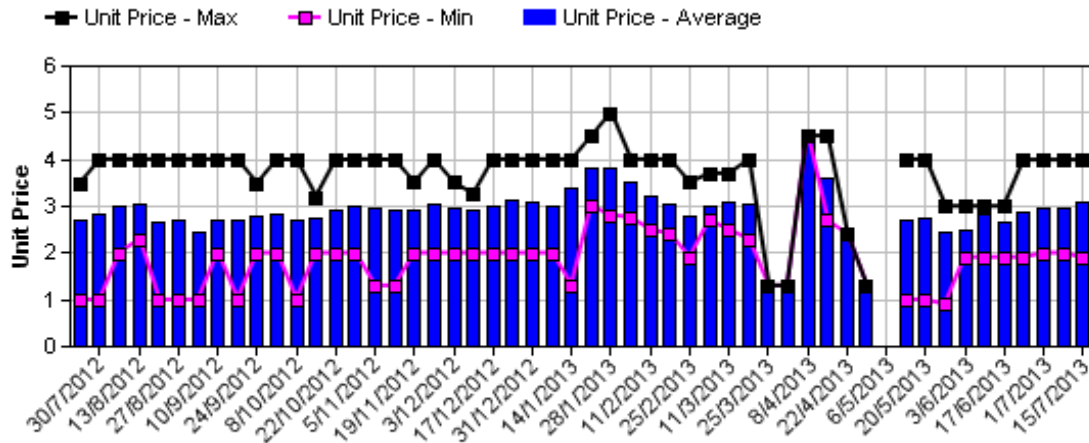
### Hass Avocado Average Retail Prices - Sydney



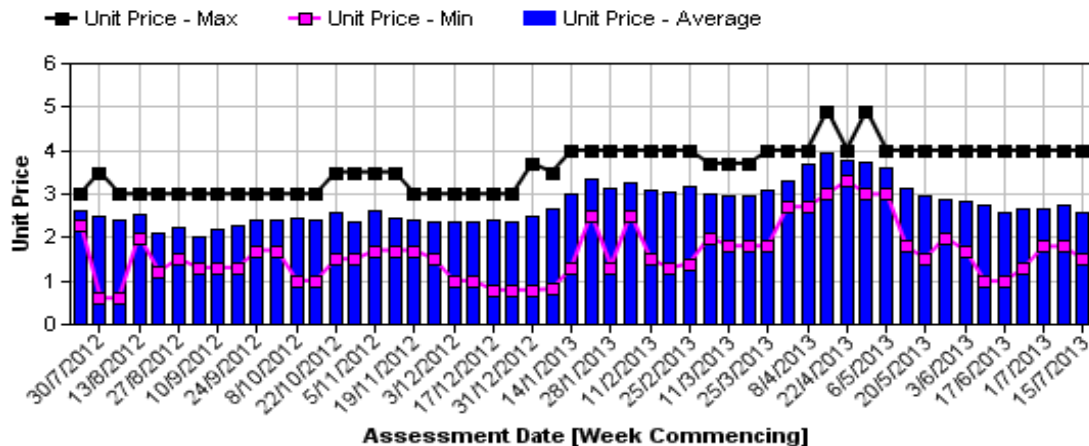
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

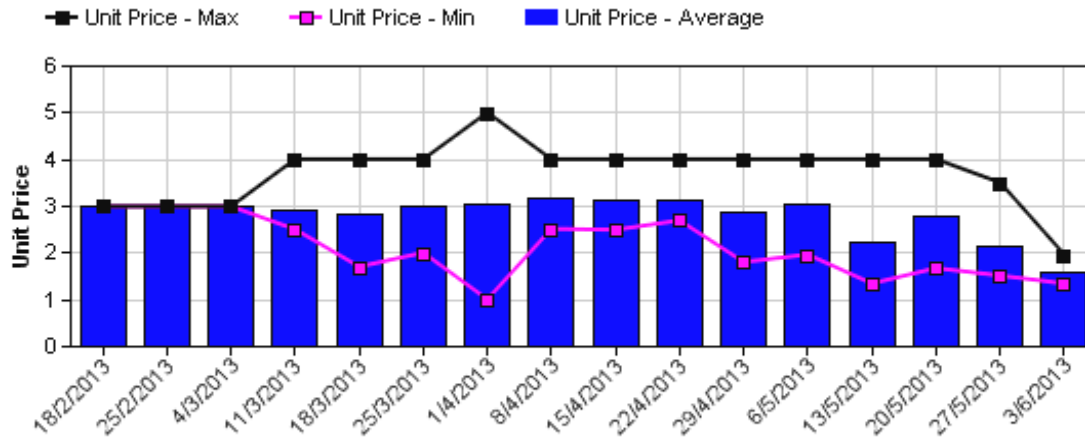


### Hass Avocado Average Retail Prices - Perth

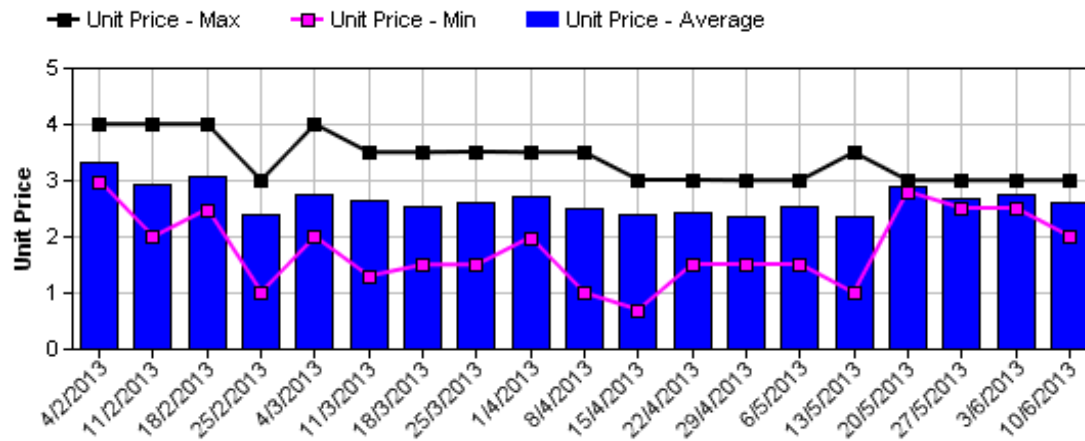


Assessment Date [Week Commencing]

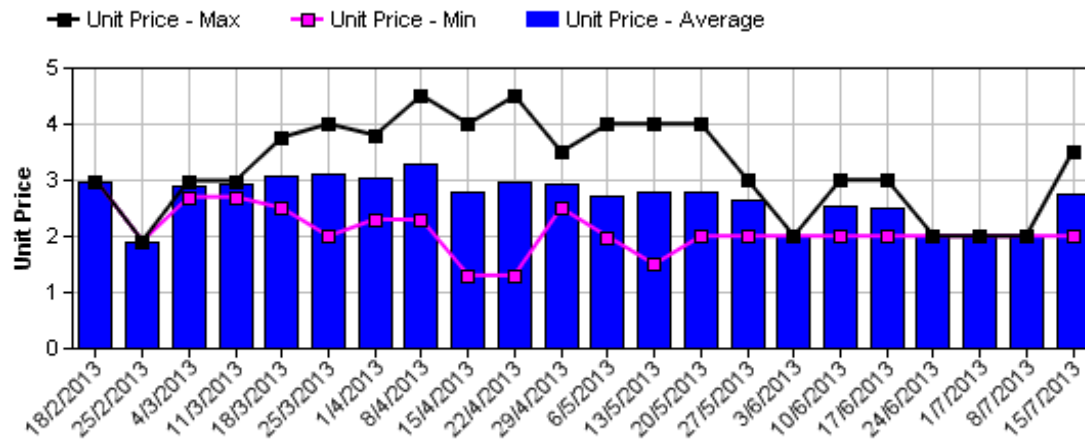
Shepard Avocado Average Retail Prices - Sydney



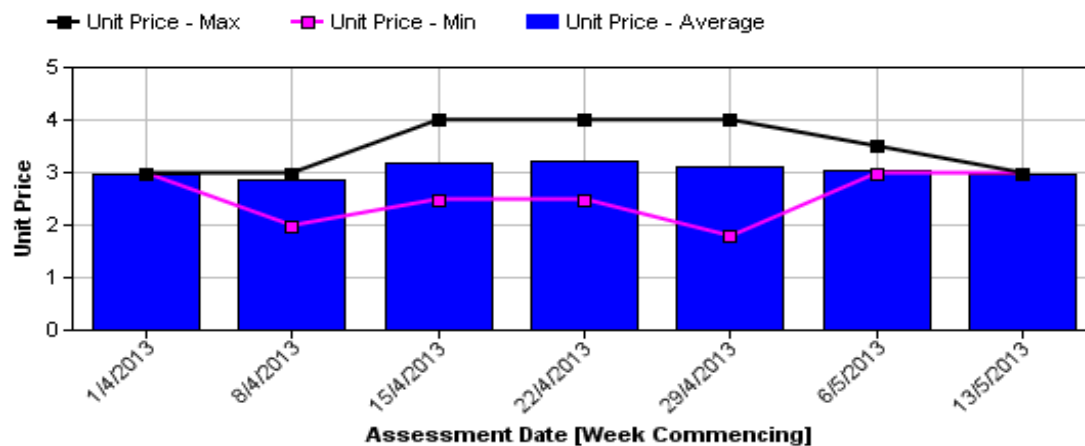
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

## Retail Prices by City, Store and Variety - 15th July 2013

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>BRISBANE</b>					
I	Hass	180	1.50	Store	Aus
I	Hass	265	1.79	Store	Aus
I	Wurtz	250	1.79	Store	Aus
IGA	Hass	180	1.98	No	Aus
Woolworths	Hass	200	1.98	No	Aus
IGA	Hass	200	1.99	No	Aus
I	Hass	240	1.99	No	Aus
I	Hass	240	1.99	No	Aus
IGA	Hass	132	2.48	No	Aus
I	Hass	262	2.50	Store	Aus
Coles	Hass	200	2.98	No	Aus
Coles	Hass	200	2.98	No	Aus
Woolworths	Hass	200	2.98	No	Aus
Woolworths	Hass	195	2.98	No	Aus
I	Hass	284	3.49	Store	Aus
<b>MELBOURNE</b>					
I	Hass	230	1.89	No	NS
I	Shepard	260	1.99	No	NS
I	Hass	216	1.99	No	Aus
Coles	Hass	250	2.55	Store	Aus
I	Hass	245	2.69	No	NS
Safeway	Hass	290	2.98	No	Aus
Coles	Hass	240	2.98	Store	Aus
Safeway	Hass	230	2.98	No	Aus
IGA	Hass	273	2.99	No	Aus
IS	Hass	270	2.99	No	Aus
I	Shepard	287	3.50	No	Aus
I	Hass	265	3.50	No	NS
I	Hass	280	3.79	No	Aus
Safeway	Hass	300	3.88	No	Aus
I	Hass	270	3.98	No	NS
I	Hass	274	3.98	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>PERTH</b>					
I	Hass	140	1.49	No	Aus
I	Hass	205	1.78	No	Aus
IS	Hass	225	1.99	Store	Aus
Coles	Hass	180	2.48	No	Aus
Coles	Hass	155	2.48	No	Aus
Woolworths	Hass	200	2.48	No	Aus
Woolworths	Hass	195	2.48	No	Aus
Coles	Hass	180	2.48	No	Aus
Woolworths	Hass	210	2.48	No	Aus
I	Hass	240	2.50	No	Aus
IGA	Hass	255	2.69	No	Aus
IGA	Hass	240	2.79	No	Aus
I	Hass	260	2.99	No	Aus
IGA	Hass	310	2.99	No	Aus
I	Hass	270	3.30	No	Aus
IGA	Hass	250	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