INFOCADO WEEKLY REPORT: 2nd July — 8th July 2016 (Week 28)

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Comments

- **Tamborine/Northern Rivers, Central New South Wales, Tri State & WA packers and consolidators — if your season is about to start please start entering your four week forecast data**
- The weekly dispatch volume (277,746 trays) is higher than this week's forecast of 234,467 trays (refer P 2).
- Central Queensland fruit continues to be dominant in the market. The Queensland market received the highest volume (94,797 tray eqv.) and the dominant size in the market was Bulk 10kg (43,027 tray eqv.) (refer P 3).
- Insufficient data was received from the NSW & WA wholesalers this week to provide a full wholesale report (refer P 5).
- Online Weekly Retail Prices have now been included in the report (refer P6&7). Prices are provided for week 28 (Wed, 6th —Tues, 12th July).
- **TNR, CNSW, Tri-State & WA packers are reminded to carefully monitor fruit maturity particularly in the early part of the harvest, to ensure consumer satisfaction which drives future purchases.**

Marketing Update: Avocado Advertisements Are Back On!

Avocado advertisements are back on TV starting next Sunday 17 July for 3 weeks, finishing on Sunday 7 August.

TV buying in July has been difficult because of the amount of demand to advertise pre and post Olympics, yet we managed to secure weekly presence in high reaching programming which includes regular appearances in the return of Offspring and the new and final season of Winners & Losers.

Upcoming Holidays

Queen's Birthday (WA): 26th Sept | Labour Day (NSW & SA) & Queens' Birthday (QLD): 3rd Oct | Labour Day (NZ): 24th October |

Report Index

P2: 4 Weekly Forecasts and Import Data | P3: Dispatches | P4: Dispatches by Region and Contributors | P5: Wholesale Data | P6&7 Retail Price 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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This project has been funded by Horticulture Innovation Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

Yellow shading indicates forecast data

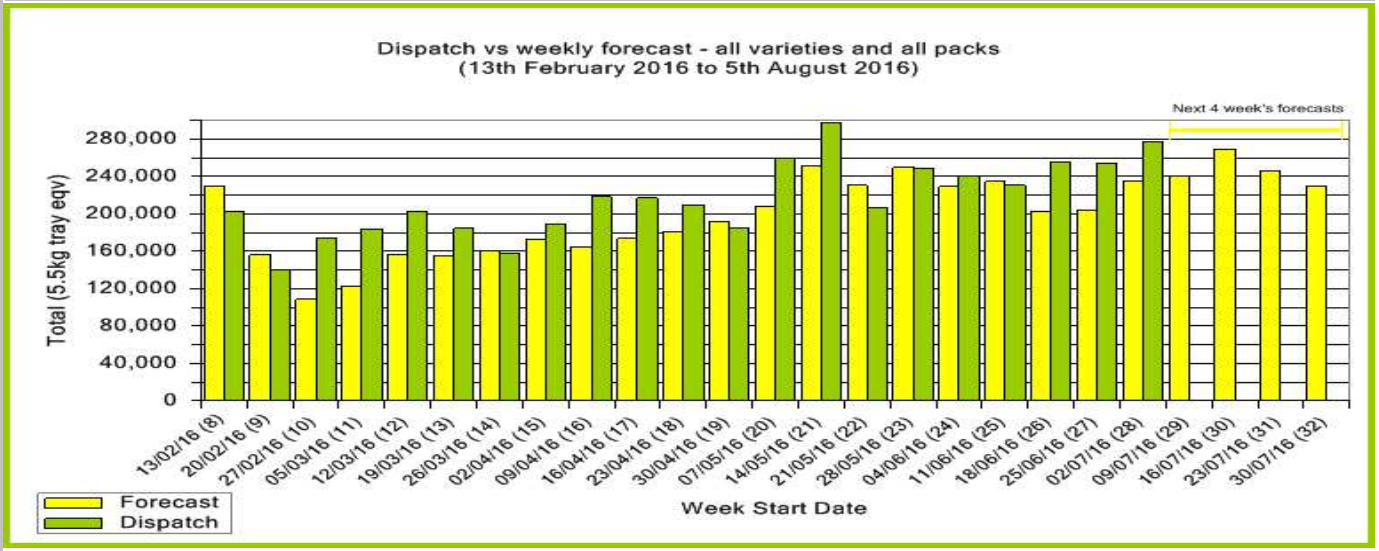
Forecast Data (Week 28 - 32)

Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 28 - begin 02/07/2016					
Fuerte	100	8			**115**
Hass	193,984	19,770	5,700	10,000	**232,783**
Sharwil	600	533			**1,569**
Week Total	**194,684**	**20,311**	**5,700**	**10,000**	**234,467**
Week 29 - begin 09/07/2016					
Fuerte	100	8			**115**
Hass	198,000	20,600	7,200	17,000	**239,855**
Week Total	**198,100**	**20,608**	**7,200**	**17,000**	**239,969**
Week 30 - begin 16/07/2016					
Fuerte	100	8			**115**
Hass	226,280	22,040	7,200	9,000	**269,298**
Week Total	**226,380**	**22,048**	**7,200**	**9,000**	**269,412**
Week 31 - begin 23/07/2016					
Hass	206,857	20,765	1,200	5,000	**245,739**
Week Total	**206,857**	**20,765**	**1,200**	**5,000**	**245,739**
Week 32 - begin 30/07/2016					
Hass	196,839	17,790	600	5,000	**230,202**
Week Total	**196,839**	**17,790**	**600**	**5,000**	**230,202**

Green shading indicates dispatch data

Dispatch Data (Week 28 - begin 2/07/2016)

Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Gem	343	16			**372**
Hass	195,557	42,939	10,434	9,450	**277,243**
Sharwil		72			**131**
Total	**195,900**	**43,027**	**10,434**	**9,450**	**277,746**



New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) July 2016 – April 2017

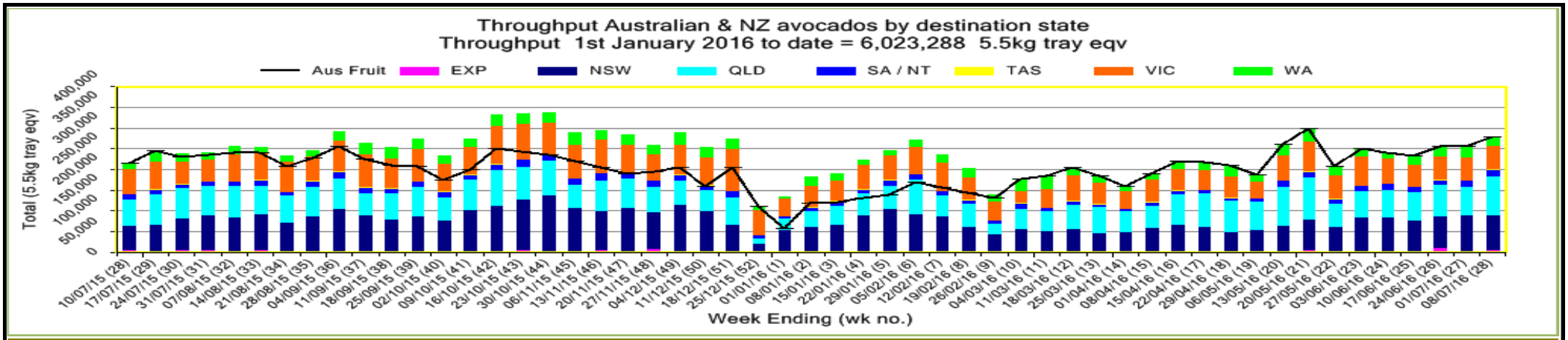
Export Destination	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	Total to Date
NZ-Aus-Pre Season Forecast[1]	20,936	146,782	593,173	608,847	661,481	744,263	844,138	837,098	56,375	1,980	**4,515,073**
NZ-Aus-Disp + Mthly Forecast[2]	20,936	146,782	593,173	608,847	661,481	744,263	844,138	837,098	56,375	1,980	**4,515,073**
Australia (from ABS)											
USA[3]											
Japan[3]											
Other Asia[3]											
Total Dispatch (Infocado 2+3)	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

1 Source: Infocado AAL, Seasonal Forecast provided by NZ at start of season
2 Source: Infocado AAL, Mthly Dispatch + Updated Mthly Seasonal Forecast provided by NZ (dispatch is updated at the end of each month or calculated from the Total Dispatch row at bottom of table)
3 Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port
* - waiting on final volumes from Infoshare NZ.
** - ABS import data is now not provided until at least 5 weeks after the close of the month.

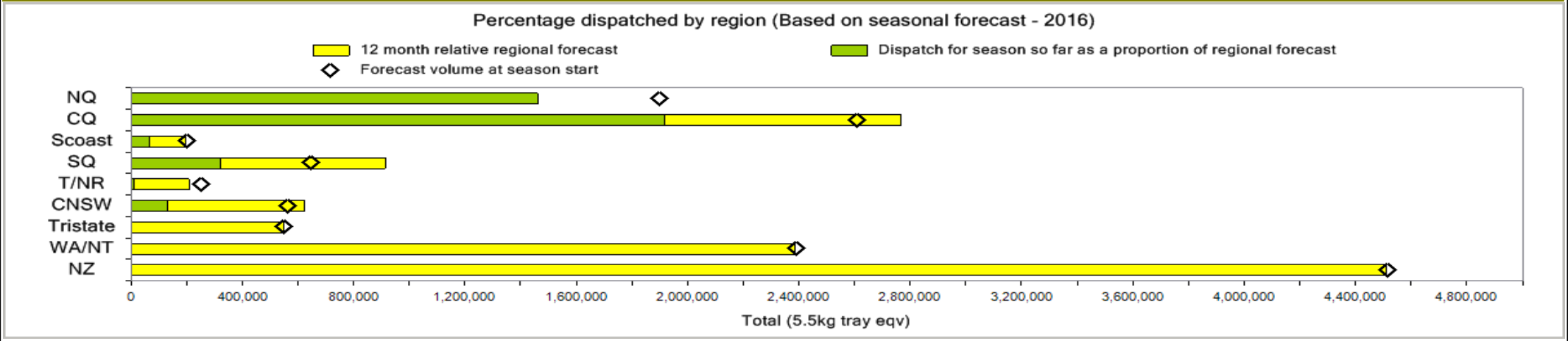
Industry Dispatches By Origin Region and Count Size : 2nd July - 8th July 2016 (Wk 28)														
Origin Region	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**Trays - Total**	**Bulk**	**P/PK**	**Proc**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Kg**	**Total**
Central NSW		2,113	4,365	9,419	5,016	4,414	6,759	4,982		**37,068**	2,719	5,000	3,000	**43,466**
Central Qld	28	224	5,029	18,972	24	22,581	23,262	25,933	8,036	**104,089**	28,275	4,734	6,450	**157,532**
North Qld		5	203	152		448	225	149	27	**1,209**	107			**1,404**
South Qld	31	185	867	6,713	577	6,196	5,198	4,557	1,177	**25,501**	4,093			**32,943**
Sunshine Coast	22	302	2,357	4,681	1,042	7,056	5,304	4,704	1,706	**27,174**	7,797			**41,350**
Tamborine/ Northern Rivers			20	40		30	70	50		**210**	20	700		**373**
Tri State	67	92	81	154	18	126	61	28	22	**649**	16			**678**
	148	**2,921**	**12,922**	**40,131**	**6,677**	**40,851**	**40,879**	**40,403**	**10,968**	**195,900**	**43,027**	**10,434**	**9,450**	**277,746**

Origin of Avocado ⇧ ⇩ **Destination of Avocado**

Industry Dispatches By Destination State and Count Size : 2nd July - 8th July 2016 (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**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Kg**	**Total**
EXP									3,949	**3,949**	609			**5,056**
NSW	83	1,063	5,011	15,832	4,841	16,520	14,162	1,304	1,988	**60,804**	11,564	8,832	2,000	**83,799**
QLD	7	298	3,961	8,440	458	9,713	14,804	17,668	3,863	**59,212**	18,804	228	7,450	**94,797**
SA / NT		14	33	1,206	152	1,082	2,233	6,992	160	**11,872**	2,024	396		**15,624**
TAS							800	464		**1,264**				**1,264**
VIC	58	1,338	3,325	13,157	1,074	12,414	7,823	2,366	1,008	**42,563**	8,090	432		**57,351**
WA		208	592	1,496	152	1,122	1,057	11,609		**16,236**	1,936	546		**19,855**
Total	**148**	**2,921**	**12,922**	**40,131**	**6,677**	**40,851**	**40,879**	**40,403**	**10,968**	**195,900**	**43,027**	**10,434**	**9,450**	**277,746**



NB: The graph below utilises the seasonal forecast data (without adjustment). The total of each bar in the below graph is a result of; Total Monthly Dispatches to date plus the remaining Seasonal Forecast which



Week 28 Contributors - Packhouses

Natures Fruit Company (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Sunfresh (Consolidator)
The Avolution (Consolidator)
I & A Tolson (CNSW)
Coastal Avocados (CNSW)
Midcoast Avocados (CNSW)
Sunnyspot Packhouse Pty Ltd (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Lava Valley Produce (CQ)
SuperPak/Avocado Ridge (CQ)
Donovan Family Investment Trust (CQ)
Avocado Industry Council (NZAGA)

Green Nugget Orchards (SQ)
Balmoral Orchard (SQ)
Mountain Fresh (SQ)
Touchwood Farming (SQ)
Wodonga Park Fruit and Nuts (SQ)
Googa Farms (SQ)
Sunnyspot Packhouse Pty Ltd (SQ)
NQ: Less than 3 contributors
SC: Less than 3 contributors
TNR: Less than 3 contributors
TRI: Less than 3 contributors
WA: Less than 3 contributors

Week 28 Contributors - Wholesalers

Costa Farms (Adelaide)
Costa Farms (Melbourne)
De Luca Banana Marketing Pty Ltd (Brisbane)
Etherington (Perth)
Exotic Fruit Traders (Sydney)
Favco Queensland Pty Ltd (Brisbane)
Fresh Choice WA Pty Ltd (Perth)

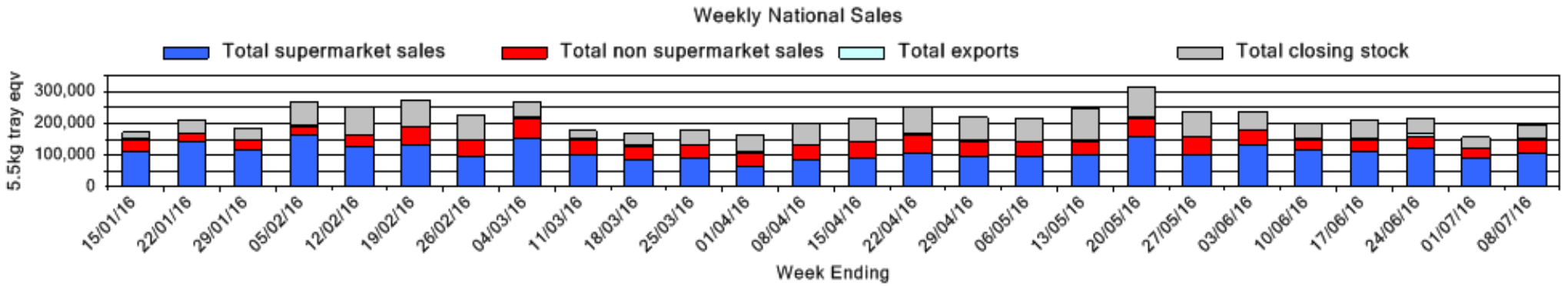
Murray Bros (Brisbane)
The La Manna Group (Adelaide)
The La Manna Group (Brisbane)
The La Manna Group (Melbourne)
United Fresh (Adelaide)
VB Sculli (Melbourne)

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																		
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	**29,725**			**29,725**	**2,228**			**2,228**	**4,051**	**8,832**			**8,832**	**1,606**	**35,382**			**35,382**
Total Stock on Hand																		
QLD																		
Total supermarket sales	33,282			**33,282**	150			150	**273**	228			228	**41**	33,596			**33,596**
Total non supermarket sales	7,770			**7,770**	954	2		956	**1,738**						9,504	4		**9,508**
Total exports	3,949			**3,949**	609			609	**1,107**						5,056			**5,056**
Total sales	**45,001**			**45,001**	**1,713**	**2**		**1,715**	**3,118**	**228**			**228**	**41**	**48,157**	**4**		**48,160**
Total Stock on Hand	**15,119**			**15,119**	**27**			**27**	**49**						**15,168**			**15,168**
SA & TAS																		
Total supermarket sales	13,720			**13,720**	8			8	**15**	396			396	**72**	13,807			**13,807**
Total non supermarket sales	2,968			**2,968**	629			629	**1,144**						4,112			**4,112**
Total exports																		
Total sales	**16,688**			**16,688**	**637**			**637**	**1,158**	**396**			**396**	**72**	**17,918**			**17,918**
Total Stock on Hand	**8,668**			**8,668**	**491**			**491**	**893**						**9,561**			**9,561**
VIC																		
Total supermarket sales	17,810			**17,810**						432			432	79	17,889			**17,889**
Total non supermarket sales	10,517		505	**11,022**	3,379		84	3,463	**6,296**	1			1		16,661		658	**17,319**
Total exports																		
Total sales	**28,327**		**505**	**28,832**	**3,379**		**84**	**3,463**	**6,296**	**433**			**433**	**79**	**34,549**		**658**	**35,207**
Total Stock on Hand	**6,673**		**745**	**7,418**	**980**			**980**	**1,782**	**54**			**54**	**10**	**8,465**		**745**	**9,210**
WA																		
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	**12,560**			**12,560**	**1,582**		**21**	**1,603**	**2,915**	**616**			**616**	**112**	**15,548**		**38**	**15,587**
Total Stock on Hand																		
Total																		
Total supermarket sales	101,076			**101,076**	2,378			2,378	**4,324**	10,504			10,504	**1,910**	107,309			**107,309**
Total non supermarket sales	27,276		505	**27,781**	6,552	2	105	6,659	**12,107**	1			1		39,189	4	696	**39,888**
Total exports	3,949			**3,949**	609			609	**1,107**						5,056			**5,056**
Total sales	**132,301**		**505**	**132,806**	**9,539**	**2**	**105**	**9,646**	**17,538**	**10,505**			**10,505**	**1,910**	**151,554**	**4**	**696**	**152,254**
Total Stock on Hand	**35,665**		**745**	**36,410**	**3,499**			**3,499**	**6,362**	**60**			**60**	**11**	**42,038**		**745**	**42,783**

Full data set not displayed because not enough NSW wholesalers contributed data this week

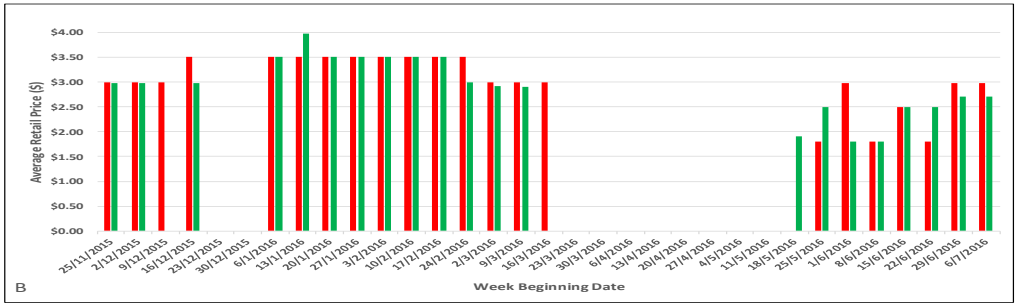
Full data set not displayed because not enough WA wholesalers contributed data this week



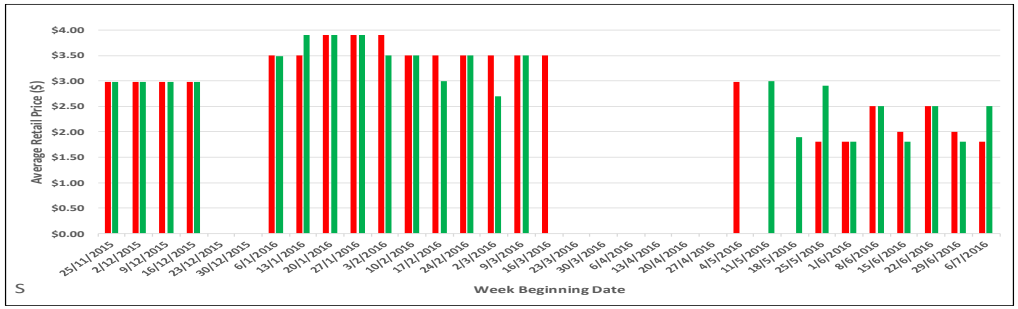
Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 6th July 2016 (Week 28)

Key: Coles online Woolworths online

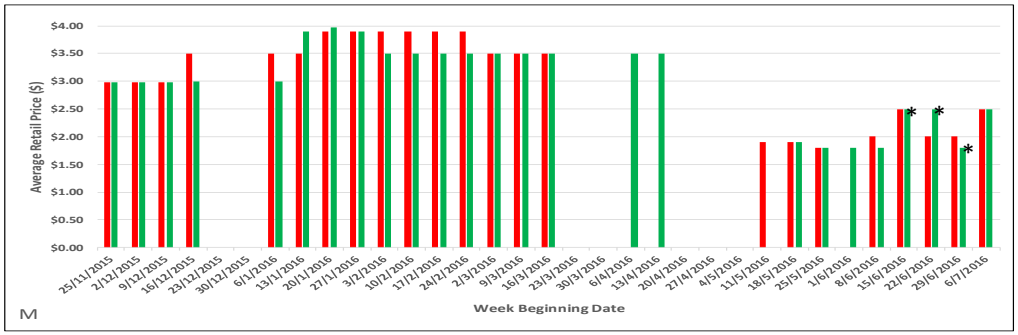
Brisbane



Sydney

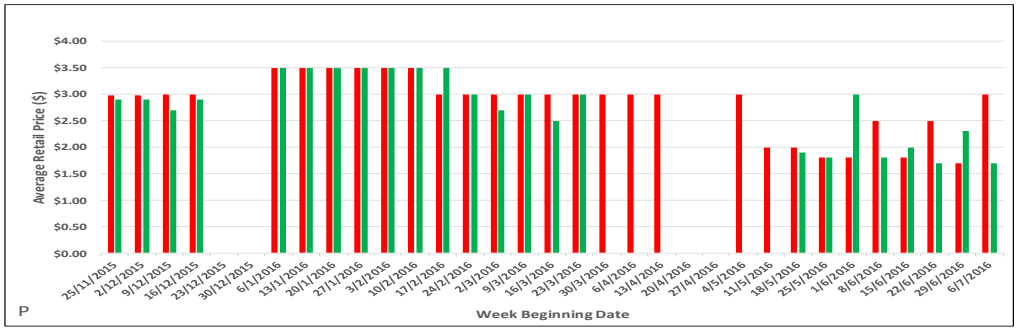


Melbourne



* Please note that Woolworths online prices for single fruit purchases in Melbourne differed depending on the store location. In the graph we have shown the higher price. For details of pricing in a given week please refer to previous reports.

Perth



Single Fruit, Multi-buy and Pack Pricing for Week Beginning - Wednesday, 6th July 2016 (Week 28)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	*Single Fruit*		$2.98	↓$1.80*	↑$2.50*	↑$3.00
	Hass	*Multi-buy*	*2 for $x*	-	-	-	2 for $4.00*
	Shepard	*Single Fruit*		-	-	-	-
	Shepard	*Multi-buy*	*2 for $x*	-	-	-	-
	Hass	*Single Fruit*	*Organic*	$4.00	-	↑$3.50	-
	Hass	*3 Pack*		-	-	-	-
Woolworths	*Hass*	*Single Fruit*		$2.70	↑$2.50	↑$2.50	↓$1.70*
	Hass	*Multi-buy*	*2 for $x*	↓2 for $4.00*	2 for $4.00*	2 for $4.50*	-
	Shepard	*Single Fruit*		-	-	-	-
	Shepard	*Multi-buy*	*2 for $x*	-	-	-	-
	Hass	*Single Fruit*	*Organic*	-	-	$4.50	-
	*Unknown***	*2 Pack*	*Ripe*	$5.90	$7.00	$6.98	-
	Hass	*2 Pack*	*Organic*	$5.50	↑$5.50	↓$5.00	-
	*Unknown***	*3 Pack*		$4.90	$3.70	$4.98	$4.98
	Hass	*4 Pack*	*Mini Ripe*	-	-	-	-
	*Unknown***	*5 Pack*	*Mini Disney*	$4.90	$4.00	$3.98	$3.98
	*Unknown***	*1kg Bag*	*Odd Bunch*	$5.40	↓$3.50*	$4.98	$3.90

Other information

Note: Online catalogues are published by major retailers each Wednesday.

Prices published in this report are reflective of online shopping and catalogue prices from Wednesday to Tuesday.

**denotes offer was advertised as a weekly and/or catalogue special*
***denotes variety not indicated in online shopping offer*
(Green) + ↑ = increase in price from previous week
(Yellow) = same price as previous week
(Red) +↓ = decrease in price from previous week

Catalogue Offers

Aldi - National - No catalogue offers found
IGA - Brisbane - Multi-buy - 2 for $3.00
IGA - Sydney - Multi-buy - 2 for $3.00
IGA - Melbourne - Multi-buy - 5 for $3.69
Foodworks - Perth - Hass - Multi-buy - 4 for $3.00
Woolworths - Brisbane - Hass - Single fruit - $2.50 & Multi-buy - 2 for $4.00
Woolworths - Sydney - Unknown - 1kg Odd Bunch Bag - $3.90
Woolworths - Perth - Hass - Single fruit - $1.70
Coles - No catalogue offers found