



INFOCADO WEEKLY REPORT: 12th July — 18th July 2014 (Wk 29)



Comments

- All major metropolitan cities have seen steady average retail prices this week with Brisbane the exception where the lowest unit price was found at \$0.49 / fruit. This may be related to the larger volume of stock on hand in Qld wholesale sector in comparison to other cities. Though the total national sales for Week 29 has increased from the past two (refer page 5).
- The dispatches for the week were slightly higher than the forecast volume aiding in levelling the total dispatch to forecast for the past 3 weeks. The varieties continue to be mixed over the next coming weeks with Hass of course being the majority volume (refer page 3).
- The fruit available on the market has originated from many different regions as winter continues. AAL would like to thank all contributors across the industry; packhouses and wholesalers, in providing data towards Infocado (refer page 4).

[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 Perth metropolitan and the WA / NT regional Qualicado workshops are to be held on 23 and 24 July 2014 respectively. AAL would like to invite all wholesalers / ripeners / transporters and growers / packers in the area to attend the respective day. For more information please visit the AAL website or contact our office directly.

Current Marketing Strategy

The New Zealand industry has agreed to contribute funding towards the avocado promotion program in Australia this year to help build continued consumption of avocados in Australia. Avocados Australia welcomes the decision, which will extend the Australian levy-funded television campaign (which is due to run again in September) by three weeks in October/November. This decision follows discussions between AAL, HAL and NZAGA over the past couple of months where a number of options for co-investment were presented.

The Australian levy-funded television commercial (TVC) will be made available under certain conditions for use by the New Zealand industry during this period. The great benefit of this approach is that it builds on what the Australian industry is doing, rather than developing a separate campaign that may have different messages. It will encourage an increase in avocado consumption across the Spring and Summer period and into the future. By using the same media agency (Ikon) the NZ funding will go further due to the contracted media rates that HAL has already negotiated with Ikon. The TVC will be amended slightly during the NZ-funded period to be 'country neutral'. It is certainly a win-win for both industries!

Upcoming Holidays

EKKA holiday (QLD): 13th August | Queens Birthday (WA): 29th September | Labour Day (QLD, NSW & SA): 6th October |

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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.

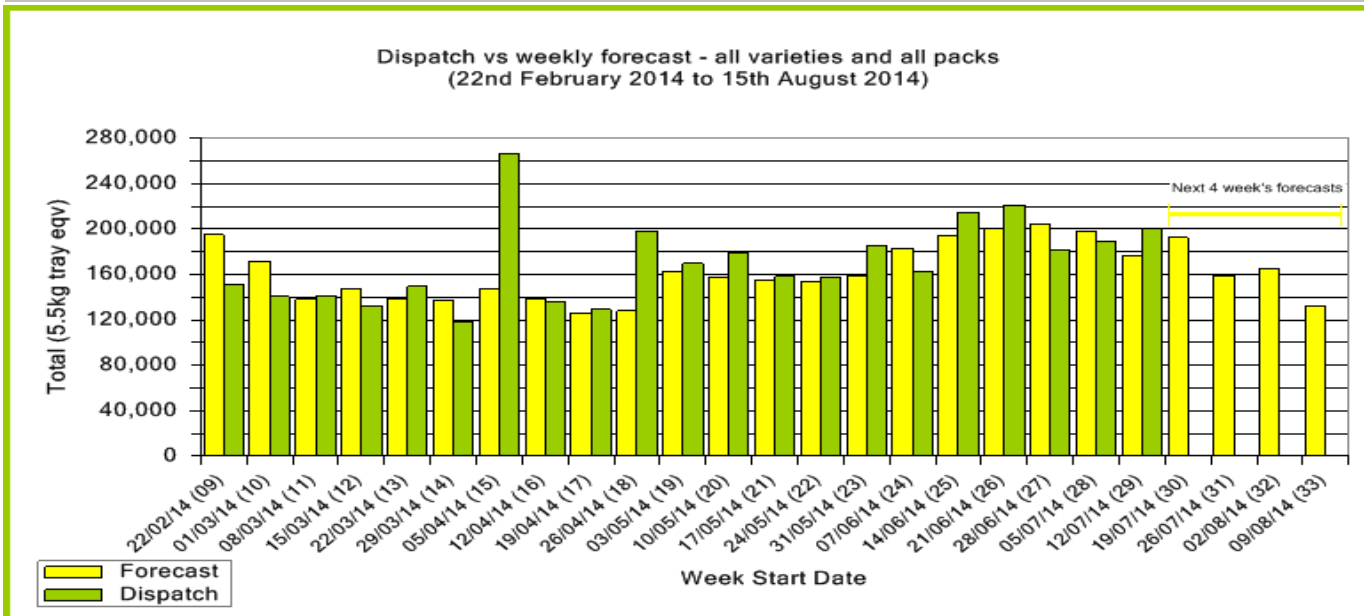
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Forecast Data (Week 29 - 33)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 29 - begin 12/07/2014					
Fuerte		90			164
Gem	2,500	60			2,609
Hass	141,468	15,108	5,200	5,500	170,882
Other	600	50			691
Sharwil	1,000	180			1,327
Wurtz	1,000				1,000
Week Total	146,568	15,488	5,200	5,500	176,673
Week 30 - begin 19/07/2014					
Fuerte	144	176			464
Gem	2,600	70			2,727
Hass	146,806	16,290	5,660	5,250	178,408
Lamb Hass	2,400	100			2,582
Other	600	20			636
Reed	6,000				6,000
Sharwil	1,250	155			1,532
Wurtz	100				100
Week Total	159,900	16,811	5,660	5,250	192,449
Week 31 - begin 26/07/2014					
Fuerte	144	176			464
Gem	600	20			636
Hass	119,020	16,361	5,660	3,150	150,369
Lamb Hass	900	100			1,082
Other	600	20			636
Reed	6,000				6,000
Sharwil	100	5			109
Week Total	127,364	16,682	5,660	3,150	159,297
Week 32 - begin 02/08/2014					
Fuerte		88			160
Gem	600	200			964
Hass	125,491	16,065	4,660	3,150	156,120
Lamb Hass	900	100			1,082
Other	600	20			636
Reed	6,000				6,000
Sharwil	100	5			109
Week Total	133,691	16,478	4,660	3,150	165,071
Week 33 - begin 09/08/2014					
Fuerte		88			160
Gem	600	200			964
Hass	103,801	13,426	3,960	1,200	129,150
Lamb Hass	900	100			1,082
Other	600	20			636
Week Total	105,901	13,834	3,960	1,200	131,992

Green shading indicates dispatch data

Yellow shading indicates forecast data

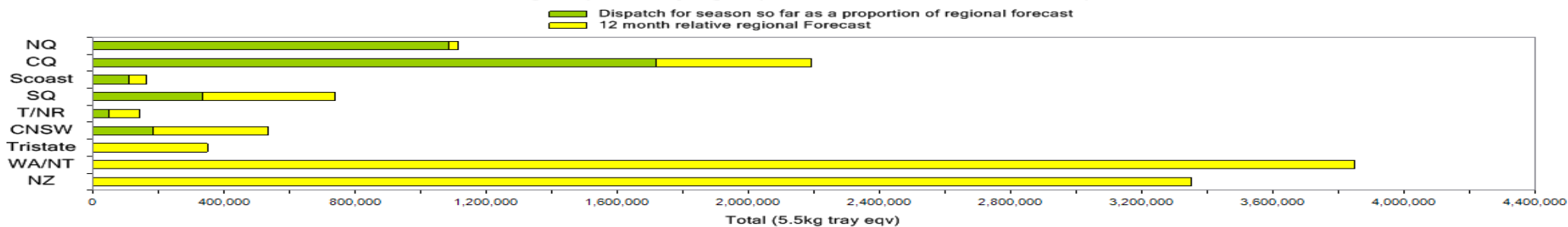
Dispatch Data (Week 29 - begin 12/07/2014)						
Variety	Trays	Bulk	P/PK	Oil	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Fuerte	144	236				573
Gem	593	27				642
Hass	145,081	25,230	5,964	2	13,870	194,560
Lamb Hass	911	806				2,376
Other	606	14				631
Pinkerton	248	25				293
Sharwil	245	131				483
Wurtz	520	348				1,153
Total	148,348	26,817	5,964	2	13,870	200,712



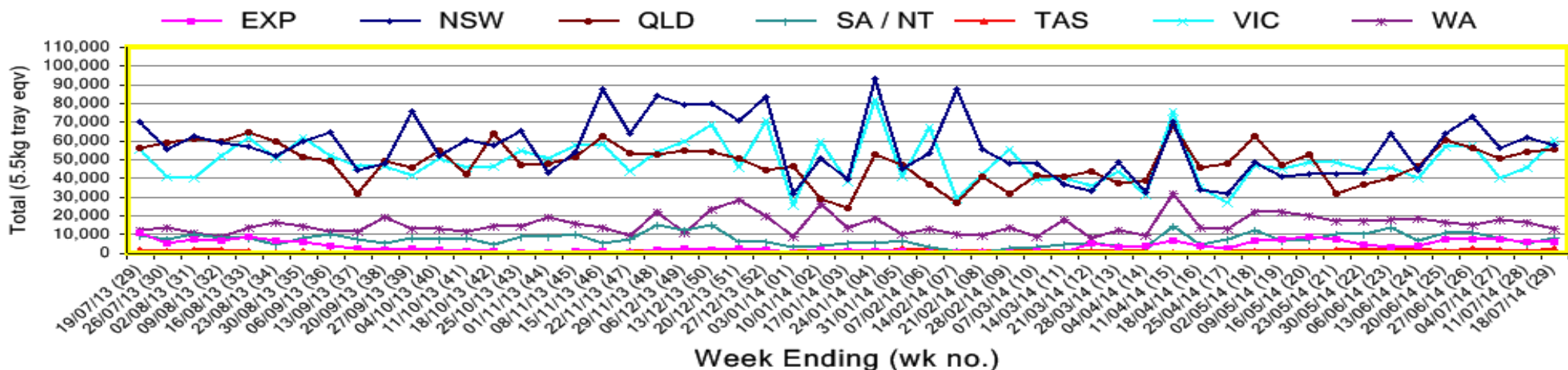
New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015											
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date	
NZ Export to Australia Forecast	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347	
Australia (from Infocado)											
USA¹											
Japan¹											
Other Asia¹											
Total											

¹ source: Statistics NZ adjusted for freight time to destination port

Percentage dispatched by region (Based on seasonal forecast - 2014)



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 4,869,651 5.5kg tray eqv



Week 29 contributors - Packhouses

Natures Fruit Company (Consolidator)	Balmoral Orchard (SQ)
One Harvest (Consolidator)	Sunnyspot Packhouse Pty Ltd (SQ)
Sunfresh (Consolidator)	Wodonga Park Fruit and Nuts (SQ)
The Evolution (Consolidator)	Perseverance Farming Co (SQ)
I & A Tolson (CNSW)	Googa Farms (SQ)
Coastal Avocados (CNSW)	Jirel Holdings (TNR)
Midcoast Avocados (CNSW)	Aussie Orchards Growers & Packers (TNR)
Lava Valley Produce (CQ)	Coastal Avocados (TNR)
Simpson Farms Pty Ltd (CQ)	T W Silver (TNR)
Sunnyspot Packhouse Pty Ltd (CQ)	Golden Hill Packing Pty Ltd (TRI)
Sunny Bluff Produce Pty Ltd (CQ)	Chinoola Orchards (TRI)
Donovan Family Investment Trust (CQ)	Bonyaricall Vineyards (TRI)
Avocado Industry Council (NZAGA)	Green Pear Avocado (WA)
G & J Krenske (SQ)	The Avocado Grove (WA)
Green Nugget Orchards (SQ)	Avowest (WA)
Touchwood Farming (SQ)	SC: Less than 3 Packhouse Contributors

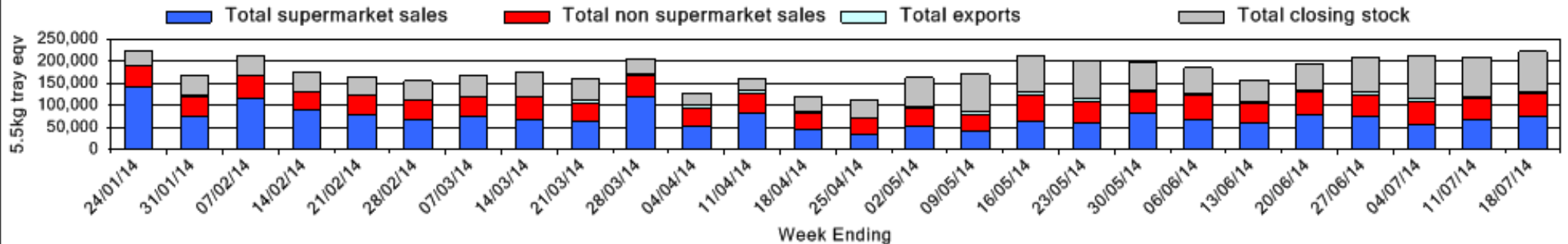
Week 29 contributors - Wholesalers

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

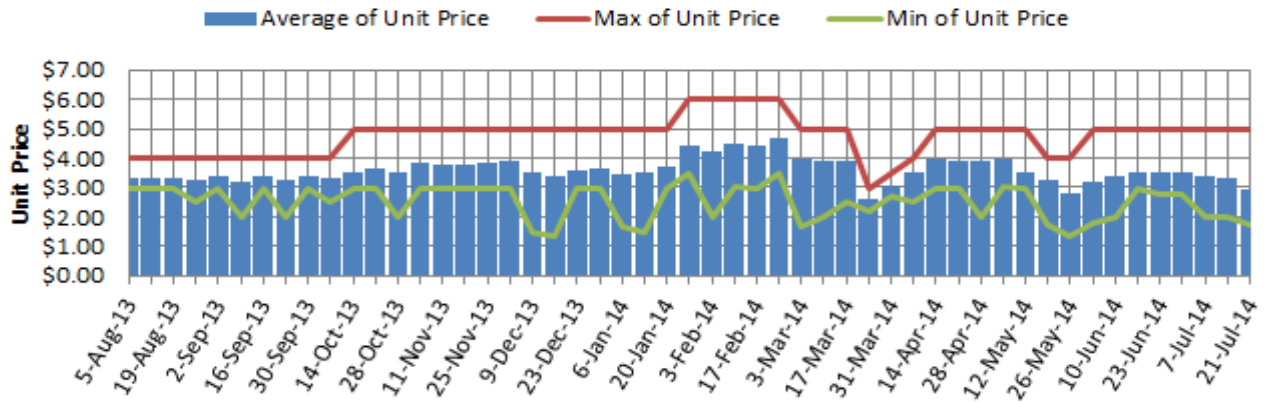
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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																		
Total supermarket sales	20,315			20,315	60			60	109						20,424			20,424
Total non supermarket sales	2,799		830	3,629	1,065		161	1,226	2,229						4,735		1,123	5,858
Total exports																		
Total sales	23,114		830	23,944	1,125		161	1,286	2,338						25,159		1,123	26,282
Total Stock on Hand	1,330		725	2,055	388			388	705						2,035		725	2,760
QLD																		
Total supermarket sales	24,798			24,798	96			96	175	240			240	44	25,016			25,016
Total non supermarket sales	13,080		2	13,082	1,221			1,221	2,220						15,300		2	15,302
Total exports	3,033			3,033	1,344			1,344	2,444						5,477			5,477
Total sales	40,911		2	40,913	2,661			2,661	4,838	240			240	44	45,793		2	45,795
Total Stock on Hand	29,638			29,638	525			525	955						30,593			30,593
SA & TAS																		
Total supermarket sales	8,637			8,637											8,637			8,637
Total non supermarket sales	3,451	37		3,488	1,722	15		1,737	3,158						6,582	64		6,646
Total exports																		
Total sales	12,088	37		12,125	1,722	15		1,737	3,158						15,219	64		15,283
Total Stock on Hand	18,042			18,042	3,346			3,346	6,084						24,126			24,126
VIC																		
Total supermarket sales	16,208			16,208						1,500			1,500	273	16,481			16,481
Total non supermarket sales	10,194		1,052	11,246	2,168		627	2,795	5,082						14,136		2,192	16,328
Total exports																		
Total sales	26,402		1,052	27,454	2,168		627	2,795	5,082	1,500			1,500	273	30,616		2,192	32,808
Total Stock on Hand	17,192		3,346	20,538	3,241			3,241	5,893						23,085		3,346	26,430
WA																		
Total supermarket sales	5,900			5,900	20			20	36						5,936			5,936
Total non supermarket sales	2,820		64	2,884	1,397		126	1,523	2,769						5,360		293	5,653
Total exports																		
Total sales	8,720		64	8,784	1,417		126	1,543	2,805						11,296		293	11,589
Total Stock on Hand	5,544		48	5,592	1,003			1,003	1,824						7,368		48	7,416
Total																		
Total supermarket sales	75,858			75,858	176			176	320	1,740			1,740	316	76,494			76,494
Total non supermarket sales	32,344	37	1,948	34,329	7,573	15	914	8,502	15,458						46,113	64	3,610	49,787
Total exports	3,033			3,033	1,344			1,344	2,444						5,477			5,477
Total sales	111,235	37	1,948	113,220	9,093	15	914	10,022	18,222	1,740			1,740	316	128,084	64	3,610	131,758
Total Stock on Hand	71,746		4,119	75,865	8,503			8,503	15,460						87,206		4,119	91,325

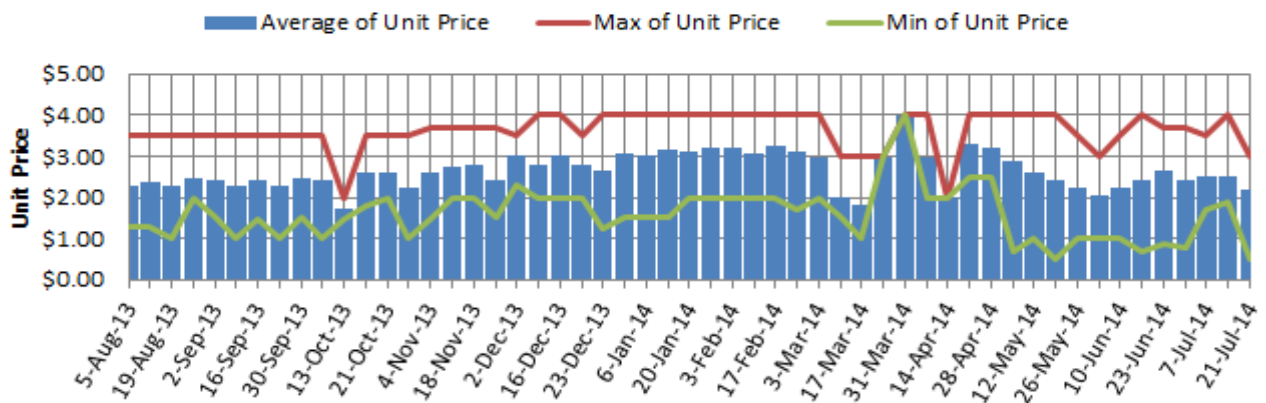
Weekly National Sales



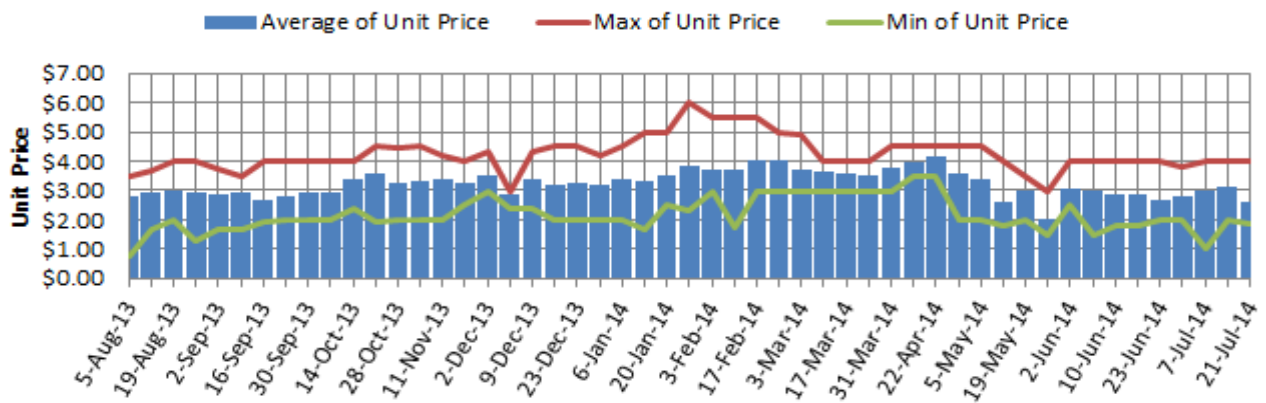
Hass Avocado Average Retail Prices - Sydney



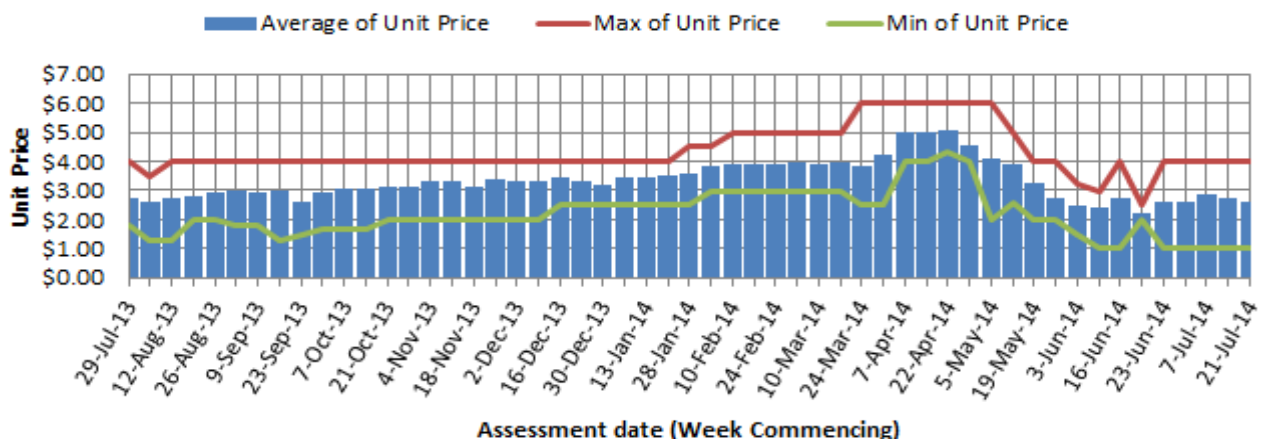
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

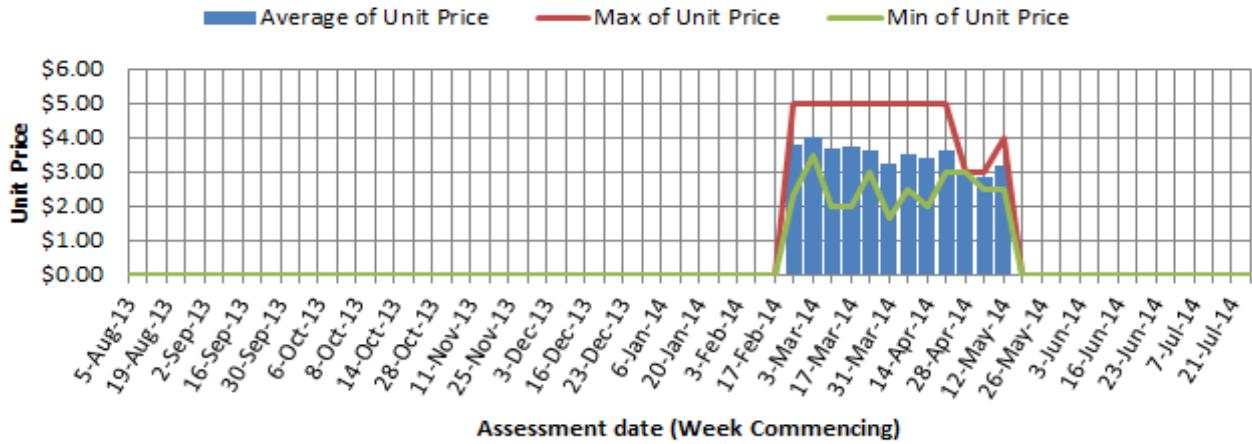


Hass Avocado Average Retail Prices - Perth

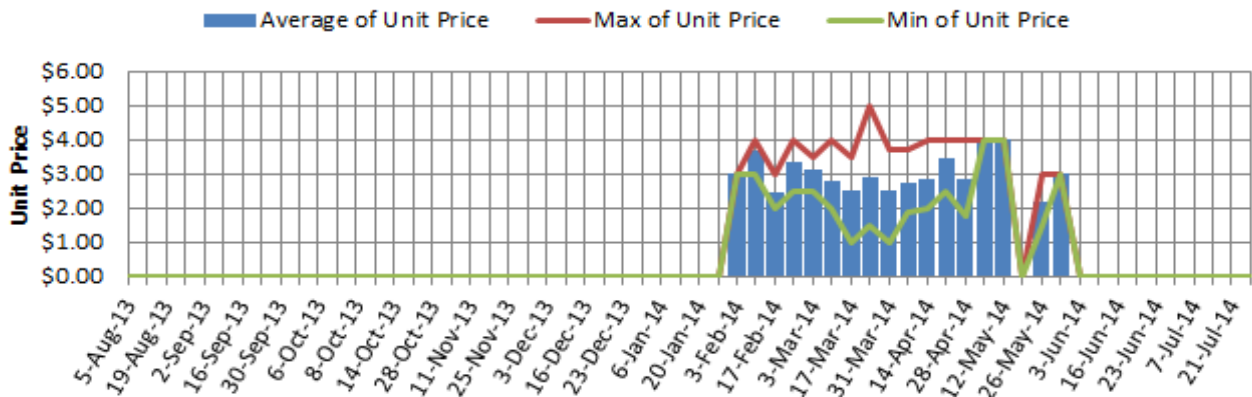


Assessment date (Week Commencing)

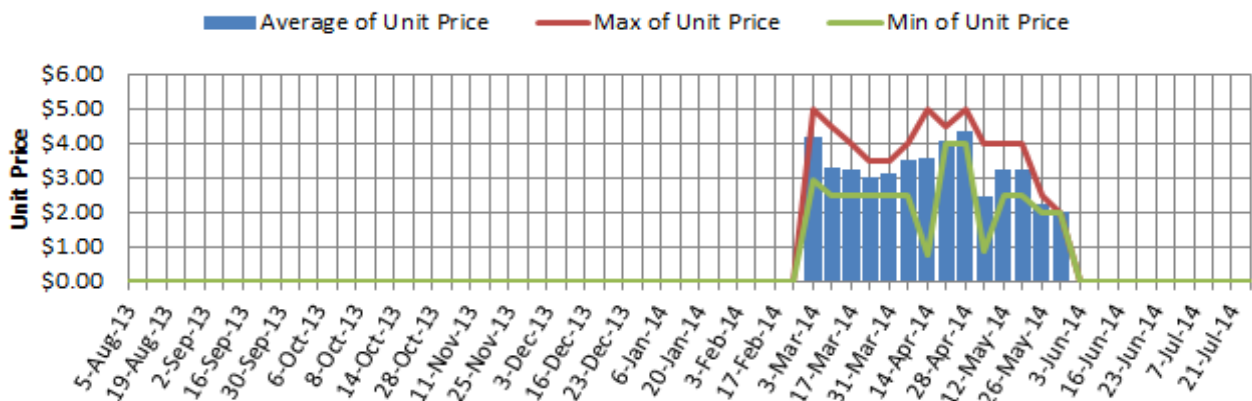
Shepard Avocado Average Retail Prices - Sydney



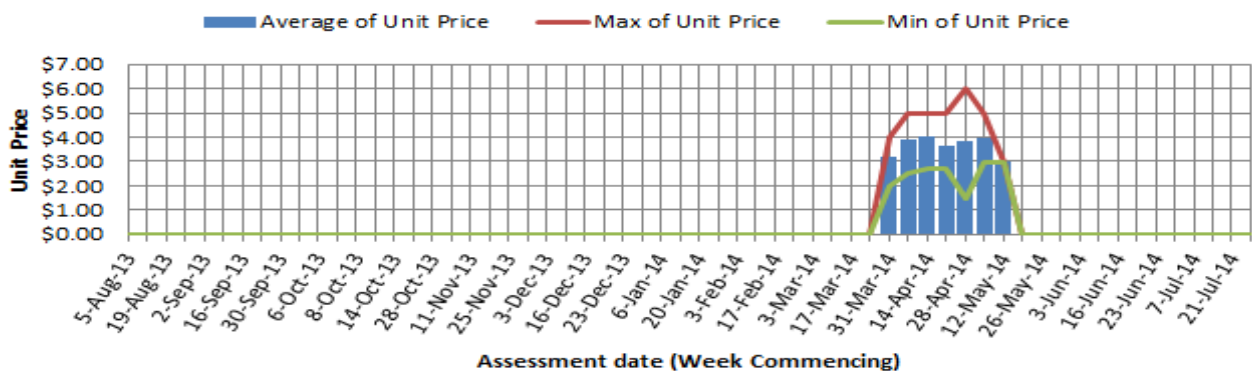
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Retail Prices by City, Store and Variety – 21st July 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
Woolworths	Hass	330	1.70	Cat	Aus
Woolworths	Hass	265	1.70	Cat	Aus
Woolworths	Hass	260	1.70	Cat	Aus
Coles	Hass	245	1.80	Cat	Aus
Coles	Hass	260	1.80	Cat	Aus
IGA	Hass	225	1.99	Store	Aus
I	Hass	275	2.99	No	Aus
I	Hass	255	2.99	No	Aus
I	Hass	310	3.49	No	Aus
I	Hass	250	3.49	No	Aus
IGA	Hass	270	3.49	No	Aus
I	Hass	340	3.90	No	Aus
I	Hass	335	3.99	No	Aus
I	Hass	315	3.99	No	Aus
I	Hass	325	4.99	No	Aus
BRISBANE					
I	Hass	105	0.49	Store	Aus
Coles	Hass	200	1.80	Cat	Aus
Coles	Hass	200	1.80	Cat	Aus
Coles	Hass	200	1.80	Cat	Aus
I	Hass	405	1.90	Store	Aus
IGA	Hass	200	1.98	No	Aus
I	Hass	209	1.99	Store	Aus
I	Hass	325	1.99	Store	Aus
I	Hass	200	1.99	No	Aus
Woolworths	Hass	200	2.68	No	Aus
Woolworths	Hass	185	2.68	No	Aus
Woolworths	Hass	220	2.68	No	Aus
I	Hass	240	2.99	No	Aus
IGA	Hass	165	2.99	No	Aus
I	Hass	260	3.00	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	205	1.89	No	Aus
Coles	Hass	270	1.90	Store	Aus
Coles	Hass	210	1.90	Store	Aus
Coles	Hass	215	1.90	Store	Aus
I	Hass	250	1.99	No	Aus
I	Hass	180	1.99	No	Aus
IS	Hass	230	1.99	Store	Aus
Woolworths	Hass	220	2.68	No	Aus
Woolworths	Hass	230	2.68	No	Aus
I	Hass	225	2.69	No	NS
Woolworths	Hass	280	2.96	No	Aus
IGA	Hass	230	2.99	No	Aus
I	Hass	290	2.99	No	Aus
I	Hass	300	3.50	No	Aus
I	Hass	330	3.50	No	Aus
I	Hass	330	3.98	No	Aus
PERTH					
IS	Hass	110	0.99	Store	Aus
IGA	Bacon	170	0.99	No	Aus
I	Hass	200	1.78	No	Aus
I	Bacon	250	1.78	No	Aus
Coles	Hass	175	1.90	Cat	Aus
Coles	Hass	190	1.90	Cat	Aus
Coles	Hass	175	1.90	Cat	Aus
Woolworths	Hass	205	2.48	No	Aus
Woolworths	Hass	220	2.48	No	Aus
Woolworths	Hass	210	2.48	No	Aus
I	Hass	245	2.99	No	Aus
IGA	Hass	270	2.99	No	Aus
IGA	Hass	260	2.99	No	Aus
I	Hass	245	2.99	No	Aus
IGA	Hass	240	3.49	No	Aus
I	Hass	270	3.99	No	Aus
I	Hass	260	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