



# INFOCADO WEEKLY REPORT: 19th July — 25th July 2014 (Wk 30)



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## Comments

- In all major metropolitan cities the average retail price per avocado has remained steady for another week. The retail price across all cities varied from \$0.99 in Perth for a 165g avocado to \$4.99 in Sydney for a 300g avocado (refer page 8).
- The dispatches for the week edged slightly higher than the forecast volume again. The total dispatch volume has resulted at the same relative level as last week. The four weekly forecast volume is trending downwards over the next month period, AAL would like to remind all contributing packhouses to update their four weekly forecast as the year progresses (refer page 3).
- Total sales in the wholesale sector for the week was similar to the previous week though with an overall reduction in total stock on hand (refer page 5).

## What you need to be aware of for next month

The Perth metropolitan and the WA / NT regional Qualicado workshops was held on 23 and 24 July 2014 respectively. AAL would like to thank all wholesalers / ripeners / transporters / growers and packers that attended each of the events. For more information please visit the AAL website where presentations will be uploaded shortly.

## 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 |

## 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:

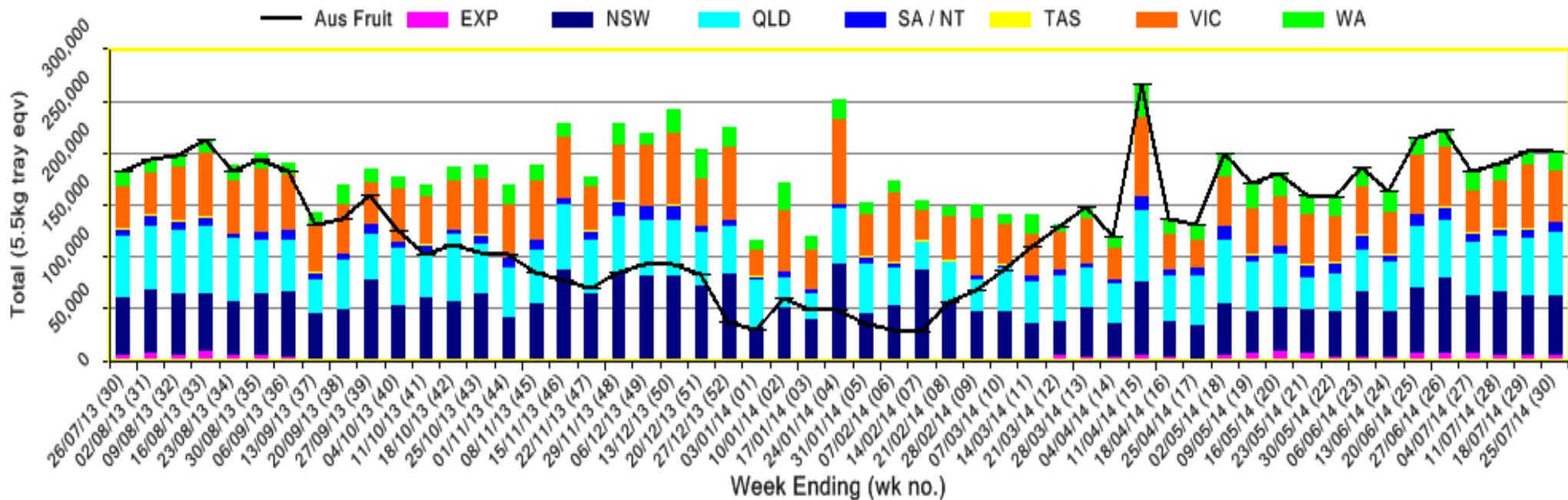
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 19th July - 25th July 2014 (Wk 30)

Dest. State	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			8							2,808		1,110		4,834
NSW	172	890	2,353	8,429	711	9,498	10,503	2,550	1,195	36,301	9,467	26,000	946	58,413
QLD	27	267	3,422	3,960	1,057	6,358	12,342	9,507	2,698	39,638	10,130	3,099	16,828	61,679
SA / NT			562	751		464	304	2,560	93	4,734	1,190	5,280		7,858
TAS							640	784		1,424	96			1,599
VIC	139	1,461	2,814	8,353	475	10,125	10,579	3,480	305	37,731	5,963	3,840		49,271
WA	5	51	192	1,146		1,396	5,854	5,917		14,561	1,393	2,040		17,465
<b>Total</b>	<b>343</b>	<b>2,669</b>	<b>9,351</b>	<b>22,639</b>	<b>2,243</b>	<b>27,841</b>	<b>40,222</b>	<b>24,798</b>	<b>7,099</b>	<b>137,205</b>	<b>29,349</b>	<b>40,259</b>	<b>17,774</b>	<b>201,119</b>

Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2014 to date = 5,070,770 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

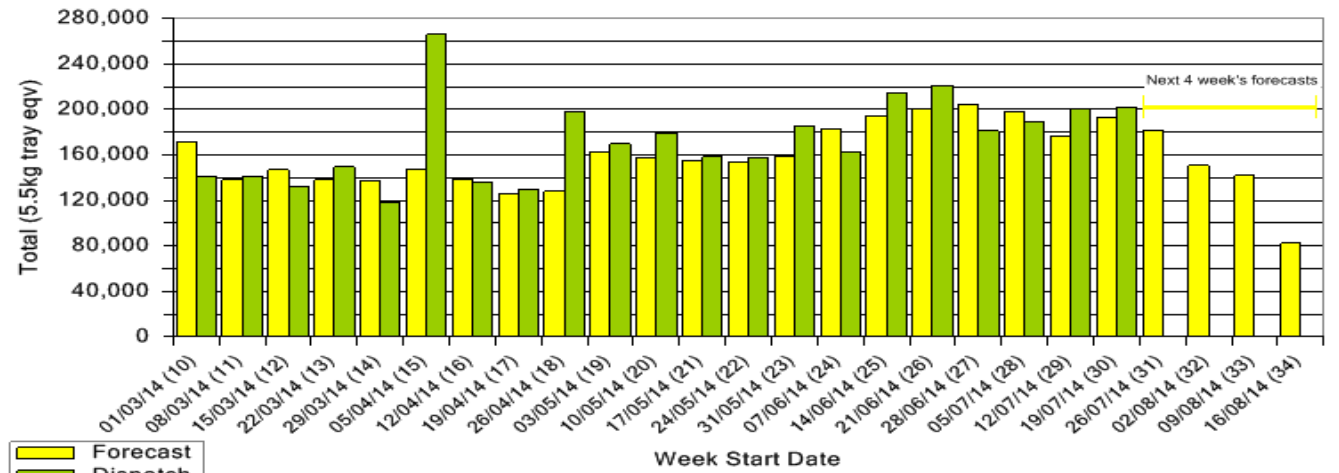
**Forecast Data (Week 30 - 34)**

Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
<b>Week 30 - begin 19/07/2014</b>					
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
<b>Week Total</b>	<b>159,900</b>	<b>16,811</b>	<b>5,660</b>	<b>5,250</b>	<b>192,449</b>
<b>Week 31 - begin 26/07/2014</b>					
Fuerte	144	176			464
Gem	600	20			636
Hass	144,380	15,046	4,540	3,250	173,152
Lamb Hass	900	100			1,082
Other	600	20			636
Reed	6,000				6,000
Sharwil	100	5			109
<b>Week Total</b>	<b>152,724</b>	<b>15,367</b>	<b>4,540</b>	<b>3,250</b>	<b>182,080</b>
<b>Week 32 - begin 02/08/2014</b>					
Fuerte	144	88			304
Gem	600	200			964
Hass	114,063	16,470	4,830	4,300	145,668
Lamb Hass	900	100			1,082
Other	600	20			636
Reed	2,000				2,000
Sharwil	100	5			109
<b>Week Total</b>	<b>118,407</b>	<b>16,883</b>	<b>4,830</b>	<b>4,300</b>	<b>150,763</b>
<b>Week 33 - begin 09/08/2014</b>					
Fuerte		88			160
Gem	600	200			964
Hass	112,225	14,230	4,260	800	139,018
Lamb Hass	900	100			1,082
Other	600	20			636
<b>Week Total</b>	<b>114,325</b>	<b>14,638</b>	<b>4,260</b>	<b>800</b>	<b>141,860</b>
<b>Week 34 - begin 16/08/2014</b>					
Fuerte		88			160
Hass	70,112	6,180	3,500	800	82,129
<b>Week Total</b>	<b>70,112</b>	<b>6,268</b>	<b>3,500</b>	<b>800</b>	<b>82,289</b>

**Dispatch Data (Week 30 - begin 19/07/2014)**

Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Fuerte	234	145			498
Gem	25	19			60
Hass	133,955	25,924	40,259	14,254	191,002
Lamb Hass	1,785	1,750		3,520	5,607
Other	634	11			654
Pinkerton	103	31			159
Reed	256	1,344			2,700
Sharwil	192	40			265
Wurtz	21	85			176
<b>Total</b>	<b>137,205</b>	<b>29,349</b>	<b>40,259</b>	<b>17,774</b>	<b>201,119</b>

Dispatch vs weekly forecast - all varieties and all packs (1st March 2014 to 22nd August 2014)

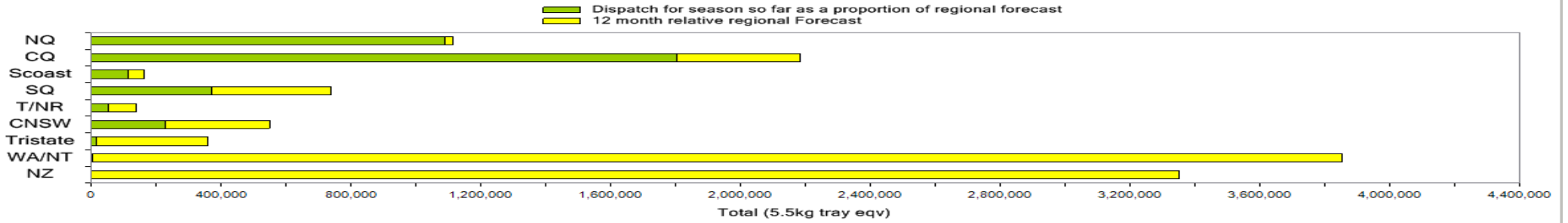


**New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015**

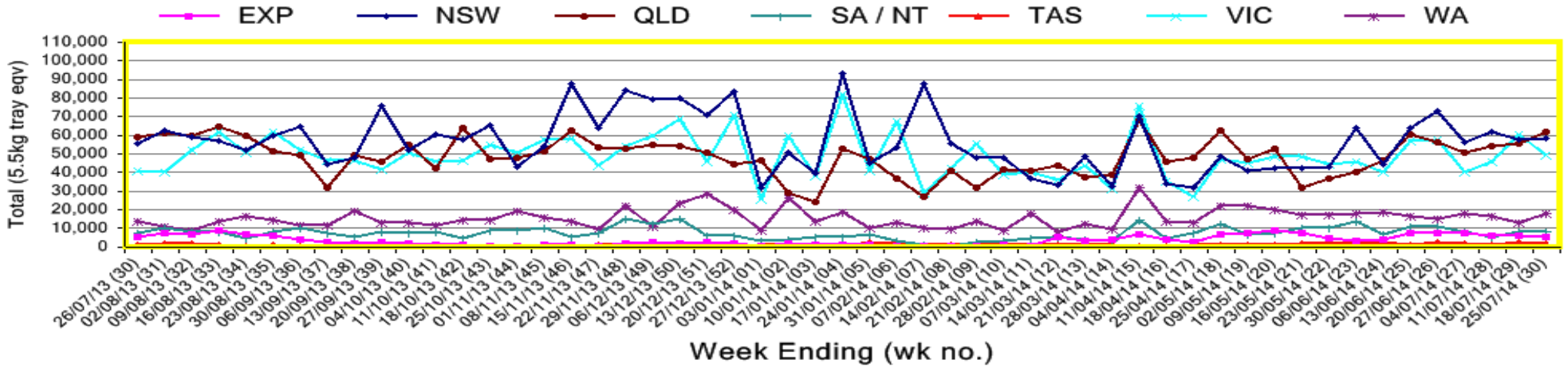
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347
<b>Australia (from Infocado)</b>										
<b>USA<sup>1</sup></b>										
<b>Japan<sup>1</sup></b>										
<b>Other Asia<sup>1</sup></b>										
<b>Total</b>										

<sup>1</sup> 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 = 5,070,770 5.5kg tray eqv



**Week 30 contributors - Packhouses**

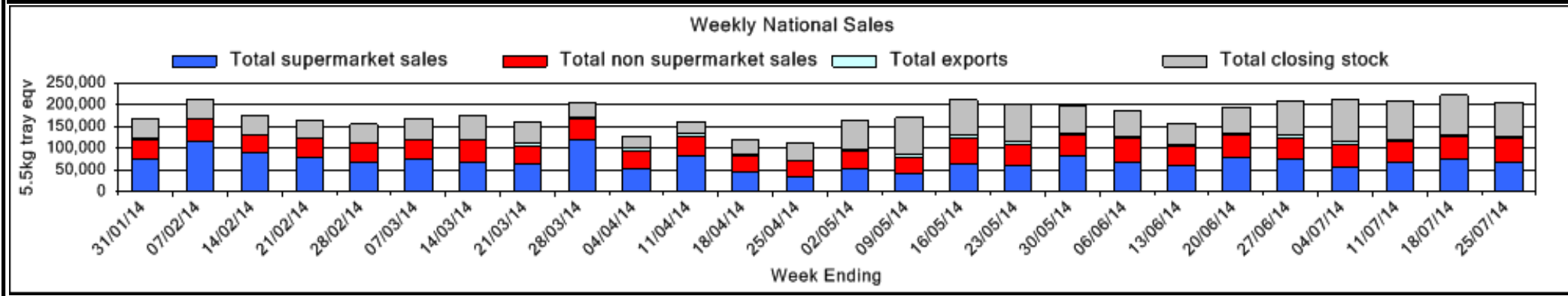
Natures Fruit Company (Consolidator)	Perseverance Farming Co (SQ)
One Harvest (Consolidator)	Touchwood Farming (SQ)
Sunfresh (Consolidator)	Wodonga Park Fruit and Nuts (SQ)
The Avolution (Consolidator)	Balmoral Orchard (SQ)
I & A Tolson (CNSW)	Sunnyspot Packhouse Pty Ltd (SQ)
Coastal Avocados (CNSW)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

**Week 30 contributors - Wholesalers**

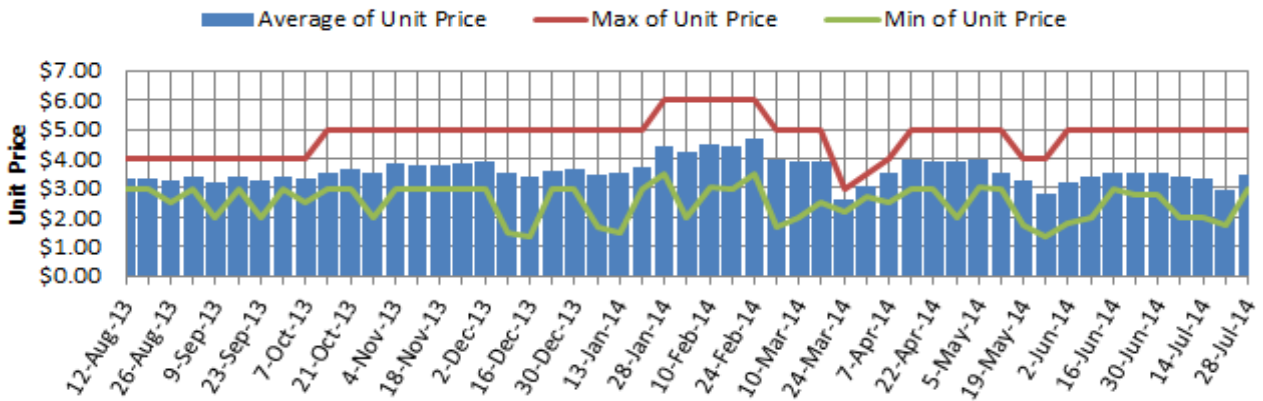
Allcrops Pty Ltd (Sydney)	Fresh Express Produce Pty Ltd (Perth)
C & S Ponte Produce Pty Ltd (Melbourne)	Murray Bros (Brisbane)
Costa Farms (Adelaide)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Melbourne)	The La Manna Group (Adelaide)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

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

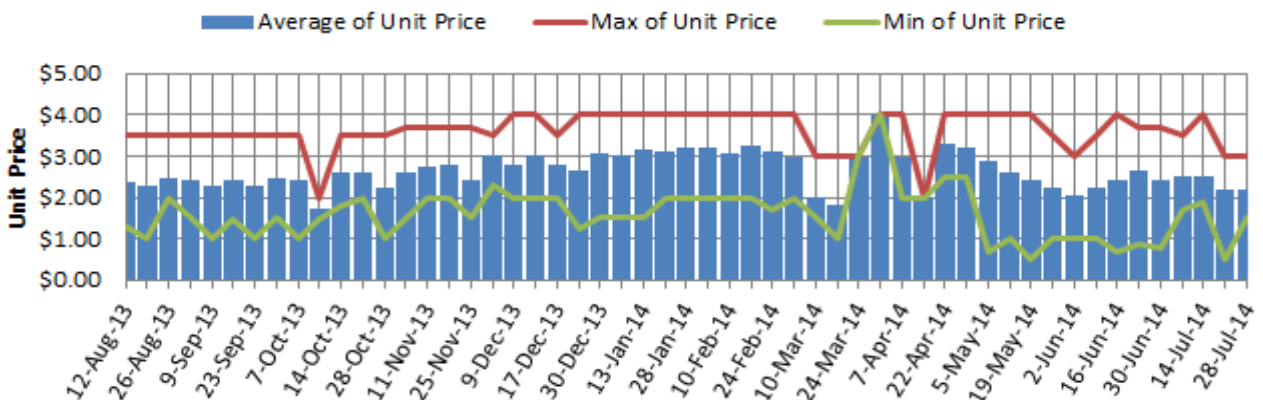
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
<b>Total supermarket sales</b>	11,120			<b>11,120</b>						23,520			23,520	<b>4,276</b>	15,396			<b>15,396</b>
<b>Total non supermarket sales</b>	2,632		750	<b>3,382</b>	1,296		12	1,308	<b>2,378</b>						4,988		772	<b>5,760</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>13,752</b>		<b>750</b>	<b>14,502</b>	<b>1,296</b>		<b>12</b>	<b>1,308</b>	<b>2,378</b>	<b>23,520</b>			<b>23,520</b>	<b>4,276</b>	<b>20,385</b>		<b>772</b>	<b>21,157</b>
<b>Total Stock on Hand</b>	<b>1,296</b>		<b>16</b>	<b>1,312</b>	<b>1,031</b>			<b>1,031</b>	<b>1,875</b>						<b>3,171</b>		<b>16</b>	<b>3,187</b>
QLD																		
<b>Total supermarket sales</b>	21,169			<b>21,169</b>						139			139	<b>25</b>	21,194			<b>21,194</b>
<b>Total non supermarket sales</b>	15,386			<b>15,386</b>	808			808	<b>1,469</b>						16,855			<b>16,855</b>
<b>Total exports</b>	2,816			<b>2,816</b>	1,110			1,110	<b>2,018</b>						4,834			<b>4,834</b>
<b>Total sales</b>	<b>39,371</b>			<b>39,371</b>	<b>1,918</b>			<b>1,918</b>	<b>3,487</b>	<b>139</b>			<b>139</b>	<b>25</b>	<b>42,884</b>			<b>42,884</b>
<b>Total Stock on Hand</b>	<b>26,389</b>			<b>26,389</b>	<b>174</b>			<b>174</b>	<b>316</b>						<b>26,705</b>			<b>26,705</b>
SA & TAS																		
<b>Total supermarket sales</b>	8,745			<b>8,745</b>						5,280			5,280	<b>960</b>	9,705			<b>9,705</b>
<b>Total non supermarket sales</b>	6,481			<b>6,481</b>	856		22	878	<b>1,596</b>						8,037		40	<b>8,077</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>15,226</b>			<b>15,226</b>	<b>856</b>		<b>22</b>	<b>878</b>	<b>1,596</b>	<b>5,280</b>			<b>5,280</b>	<b>960</b>	<b>17,742</b>		<b>40</b>	<b>17,782</b>
<b>Total Stock on Hand</b>	<b>14,751</b>			<b>14,751</b>	<b>3,139</b>		<b>38</b>	<b>3,177</b>	<b>5,776</b>						<b>20,458</b>		<b>69</b>	<b>20,527</b>
VIC																		
<b>Total supermarket sales</b>	11,664			<b>11,664</b>						2,880			2,880	<b>524</b>	12,188			<b>12,188</b>
<b>Total non supermarket sales</b>	9,189		1,021	<b>10,210</b>	3,270		192	3,462	<b>6,295</b>						15,135		1,370	<b>16,505</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>20,853</b>		<b>1,021</b>	<b>21,874</b>	<b>3,270</b>		<b>192</b>	<b>3,462</b>	<b>6,295</b>	<b>2,880</b>			<b>2,880</b>	<b>524</b>	<b>27,322</b>		<b>1,370</b>	<b>28,692</b>
<b>Total Stock on Hand</b>	<b>16,125</b>		<b>2,856</b>	<b>18,981</b>	<b>2,296</b>			<b>2,296</b>	<b>4,175</b>						<b>20,299</b>		<b>2,856</b>	<b>23,156</b>
WA																		
<b>Total supermarket sales</b>	8,308			<b>8,308</b>	8			8	<b>15</b>	2,040			2,040	<b>371</b>	8,693			<b>8,693</b>
<b>Total non supermarket sales</b>	4,371		48	<b>4,419</b>	1,527		640	2,167	<b>3,940</b>						7,147		1,212	<b>8,359</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>12,679</b>		<b>48</b>	<b>12,727</b>	<b>1,535</b>		<b>640</b>	<b>2,175</b>	<b>3,955</b>	<b>2,040</b>			<b>2,040</b>	<b>371</b>	<b>15,841</b>		<b>1,212</b>	<b>17,052</b>
<b>Total Stock on Hand</b>	<b>4,188</b>			<b>4,188</b>	<b>278</b>		<b>198</b>	<b>476</b>	<b>865</b>						<b>4,693</b>		<b>360</b>	<b>5,053</b>
Total																		
<b>Total supermarket sales</b>	61,006			<b>61,006</b>	8			8	<b>15</b>	33,859			33,859	<b>6,156</b>	67,177			<b>67,177</b>
<b>Total non supermarket sales</b>	38,059		1,819	<b>39,878</b>	7,757		866	8,623	<b>15,678</b>						52,163		3,393	<b>55,556</b>
<b>Total exports</b>	2,816			<b>2,816</b>	1,110			1,110	<b>2,018</b>						4,834			<b>4,834</b>
<b>Total sales</b>	<b>101,881</b>		<b>1,819</b>	<b>103,700</b>	<b>8,875</b>		<b>866</b>	<b>9,741</b>	<b>17,711</b>	<b>33,859</b>			<b>33,859</b>	<b>6,156</b>	<b>124,174</b>		<b>3,393</b>	<b>127,567</b>
<b>Total Stock on Hand</b>	<b>62,749</b>		<b>2,872</b>	<b>65,621</b>	<b>6,918</b>		<b>236</b>	<b>7,154</b>	<b>13,007</b>						<b>75,327</b>		<b>3,301</b>	<b>78,628</b>



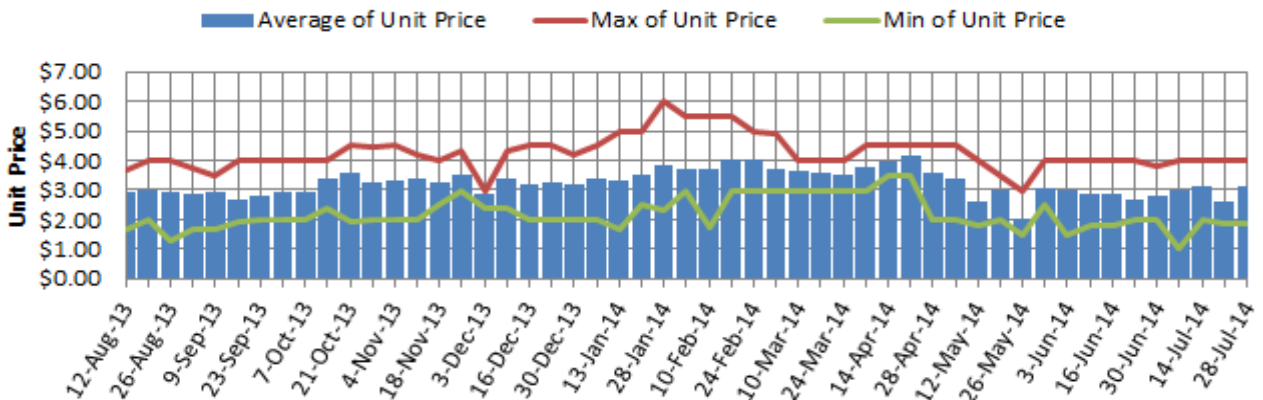
### Hass Avocado Average Retail Prices - Sydney



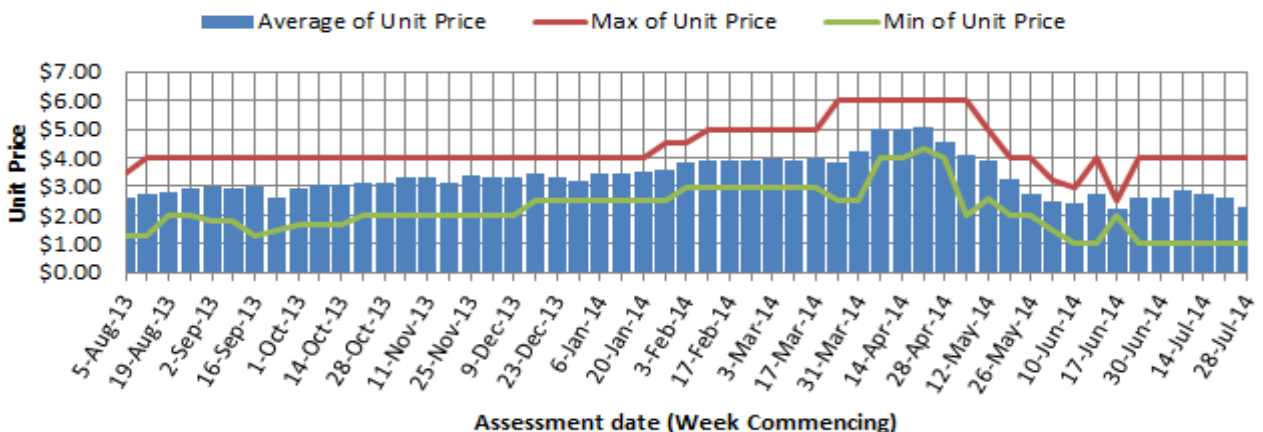
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

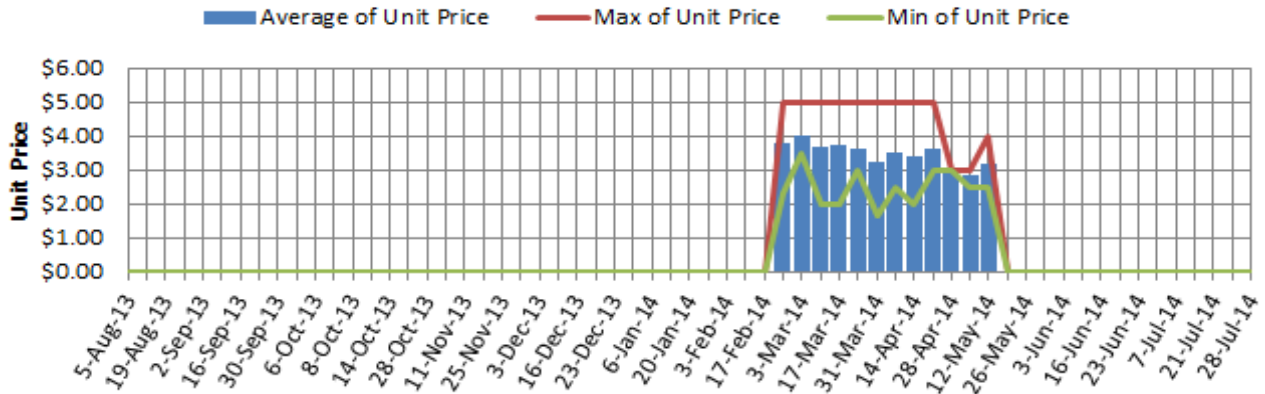


### Hass Avocado Average Retail Prices - Perth

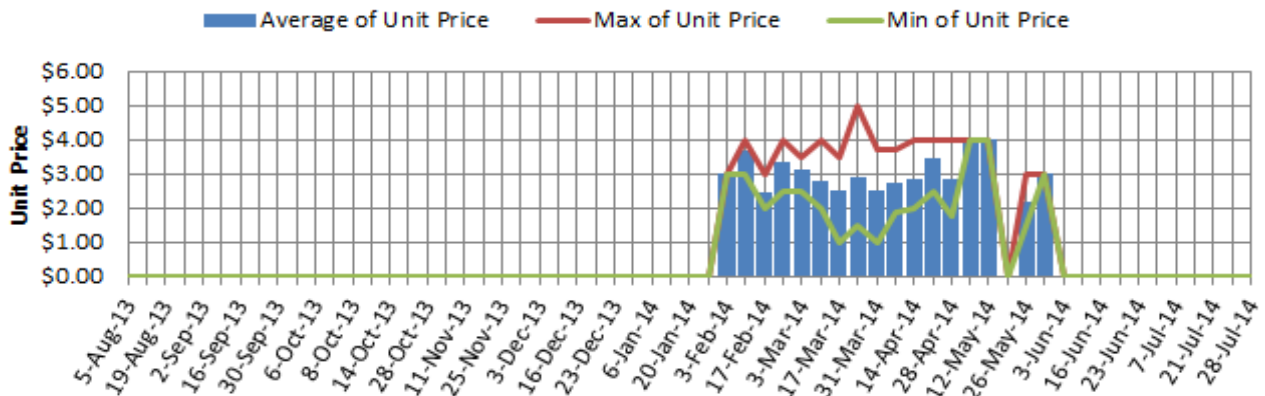


Assessment date (Week Commencing)

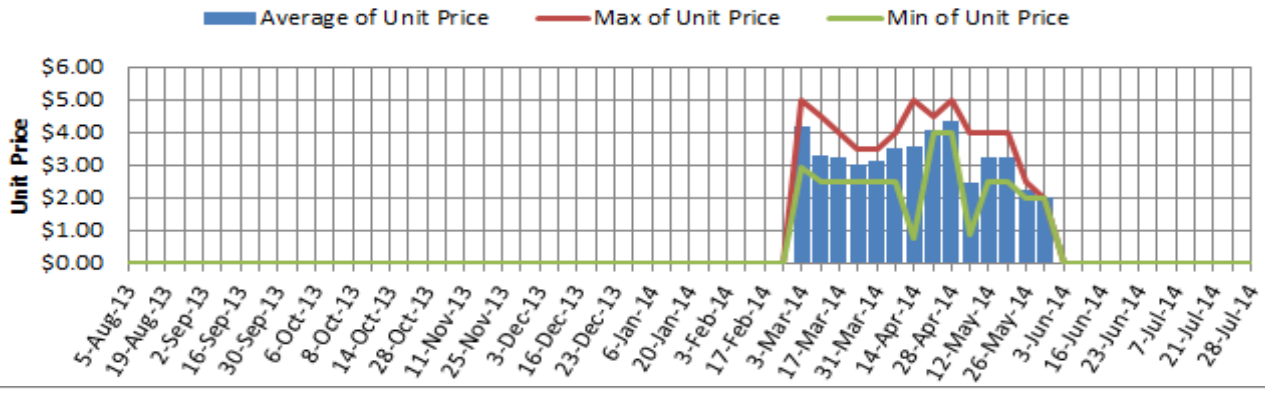
### Shepard Avocado Average Retail Prices - Sydney



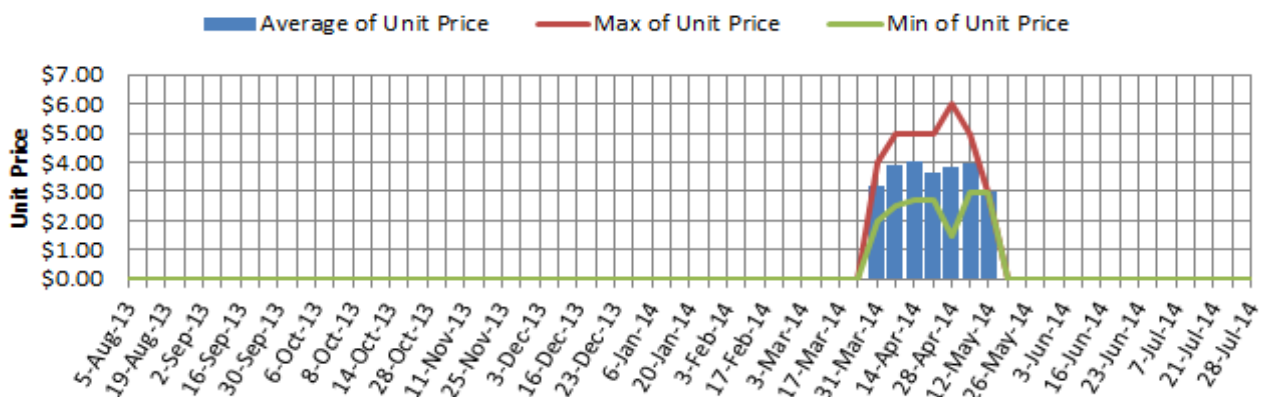
### Shepard Avocado Average Retail Prices - Brisbane



### Shepard Avocado Average Retail Prices - Melbourne



### Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 28th July 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>						<b>MELBOURNE</b>					
Coles	Hass	240	2.98	No	Aus	I	Hass	205	1.89	No	Aus
Woolworths	Hass	290	2.98	No	Aus	I	Hass	170	1.99	No	Aus
Coles	Hass	270	2.98	No	Aus	I	Hass	250	2.49	No	Aus
Coles	Hass	240	2.98	No	Aus	I	Hass	225	2.69	No	NS
IGA	Hass	190	2.98	No	Aus	IGA	Hass	250	2.99	No	Aus
Woolworths	Hass	290	2.98	No	Aus	IS	Hass	250	2.99	No	Aus
Woolworths	Hass	280	2.98	No	Aus	I	Hass	310	3.25	No	Aus
I	Hass	260	2.99	No	Aus	Woolworths	Hass	250	3.48	No	Aus
I	Hass	260	2.99	No	Aus	Coles	Hass	250	3.48	No	Aus
Foodworks	Hass	290	3.49	No	Aus	Woolworths	Hass	240	3.48	No	Aus
I	Hass	260	3.49	No	Aus	Coles	Hass	200	3.48	No	Aus
IGA	Hass	280	3.49	No	Aus	Coles	Hass	210	3.48	No	Aus
I	Hass	310	3.99	No	Aus	Woolworths	Hass	250	3.48	No	Aus
I	Hass	300	3.99	No	Aus	I	Hass	260	3.49	No	Aus
I	Hass	300	4.99	No	Aus	I	Hass	325	3.79	No	Aus
I	Hass	300	4.99	No	Aus	I	Hass	340	3.98	No	Aus
<b>BRISBANE</b>						<b>PERTH</b>					
I	Hass	140	1.50	Store	Aus	IGA	Hass	165	0.99	No	Aus
IGA	Hass	220	1.69	Store	Aus	IGA	Bacon	230	0.99	No	Aus
I	Hass	180	1.69	No	Aus	IS	Hass	120	1.29	Store	Aus
IGA	Hass	170	1.69	Store	Aus	IS	Bacon	160	1.29	Store	Aus
Woolworths	Hass	200	1.90	No	Aus	I	Bacon	240	1.78	No	Aus
Woolworths	Hass	315	1.90	Store	Aus	Coles	Hass	185	1.80	Cat	Aus
Woolworths	Hass	200	1.90	Store	Aus	Coles	Hass	190	1.80	Cat	Aus
I	Hass	208	2.29	No	Aus	Coles	Hass	190	1.80	Cat	Aus
Coles	Hass	220	2.48	No	Aus	IGA	Hass	220	1.89	Cat	Aus
Coles	Hass	200	2.48	No	Aus	IGA	Hass	200	1.89	Cat	Aus
Coles	Hass	200	2.48	No	Aus	IGA	Hass	255	1.89	Cat	Aus
I	Reed	510	2.69	No	Aus	Woolworths	Hass	200	2.48	No	Aus
I	Hass	320	2.79	Store	Aus	Woolworths	Hass	215	2.48	No	Aus
I	Hass	305	3.00	No	Aus	I	Hass	280	2.99	No	Aus
I	Hass	180	3.00	Store	Aus	I	Hass	220	2.99	No	Aus
						I	Hass	250	3.99	No	Aus
						I	Hass	270	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