



INFOCADO WEEKLY REPORT: 27th July — 2nd August 2013 (Wk 31)



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Comments

- Please note a change has been made to the Percentage Dispatched by Region graph on page 4 of this report. A scale has been included at the bottom of the graph to give a more clear indication of volume. If you have any feedback about this change please email infocado@avocado.org.au or phone 07 3846 6466.
- Catalogue specials are in place in QLD Coles stores this week along with some IGA chains. Prices peaked at \$3.99 at a Sydney independent store.
- All packers who are looking to start sending fruit to market in September should start thinking about putting their four weekly forecast into the system.
- If you are looking to attend the Qualicado Workshop in NQ on Thursday 15 August please RSVP to supplychain@avocado.org.au by the end of this week.
- Don't forget the Brisbane Ekka holiday is on next week and may affect sales.

What you need to be aware of for next month

- In terms of the levy funded promotional campaign, the focus of the next 6 months will be the launch of a tactical advertising campaign targeting breakfast as a specific opportunity to grow avocado usage. This was identified in the market research as an opportunity for growth particularly with consumers classified through the segmentation analysis as Avocado Lovers and Enthusiasts. This campaign will encourage Avocado Lovers to include avocados for breakfast (more often) during the week, which is about reinforcing and extending existing behaviour, rather than trying to change behaviour. During August the breakfast campaign will be started via social media and the Australian Avocado website before starting proposed magazine advertising during September, October and November. Food and lifestyle magazine titles will be the main focus supported by digital display banner advertising online.
- The July 2013 Quarterly Report forecasts a total of 747,474 5.5kg eqv trays in the market place for September with 723,065 5.5kg eqv trays being Hass.
- The weekly Infocado Report will be published as usual despite the Australia/New Zealand Conference taking place from the 9-12th September. If you are planning on attending the conference please either submit your data before you leave or make arrangements for another staff member to fill in for you. The Avocados Australia office will be attended if you do have any concerns or questions regarding Infocado that week. Please call 07 3846 6566 or email infocado@avocado.org.au

Upcoming Holidays

QLD EKKA Show Holiday: 14 August | 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:

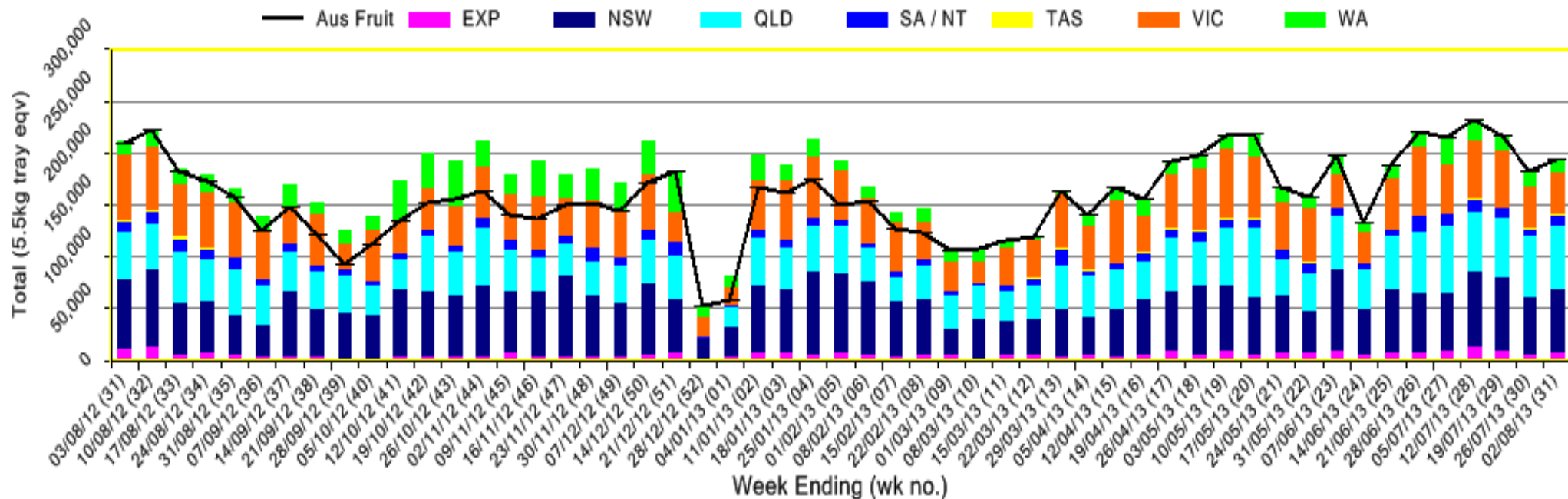
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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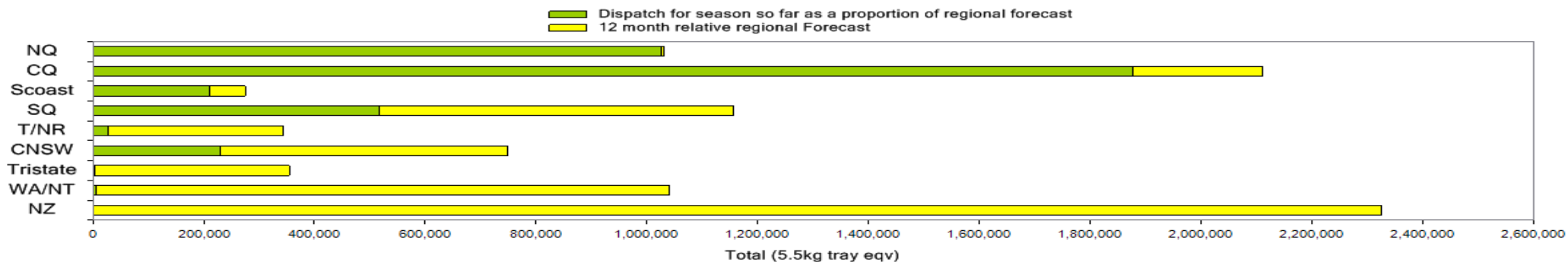
Industry Dispatches By Destination State and Count Size : 27th July - 2nd August 2013 (Wk 31)

| 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 | | | | | | | | 160 | 2,736 | 2,896 | 2,304 | | | 7,085 |
| NSW | 479 | 1,948 | 4,767 | 10,616 | 2,571 | 8,374 | 3,959 | 3,761 | 992 | 37,467 | 12,578 | 11,075 | | 62,350 |
| QLD | 1,353 | 7,564 | 2,828 | 3,053 | 843 | 4,621 | 4,652 | 7,492 | 965 | 33,371 | 13,577 | 4,320 | 9,200 | 60,514 |
| SA / NT | 42 | 118 | 695 | 1,916 | 80 | 635 | 1,736 | 3,488 | | 8,710 | 559 | | | 9,726 |
| TAS | | | | | | | | 160 | 1,760 | 1,920 | | | | 1,920 |
| VIC | 236 | 1,060 | 3,328 | 6,397 | 1,614 | 6,628 | 5,615 | 1,977 | 470 | 27,325 | 5,865 | 10,706 | | 39,936 |
| WA | | 14 | 336 | 898 | | 894 | 3,591 | 1,104 | | 6,837 | 2,208 | | | 10,852 |
| Total | 2,110 | 10,704 | 11,954 | 22,880 | 5,108 | 21,312 | 21,313 | 17,982 | 5,163 | 118,526 | 37,091 | 26,101 | 9,200 | 192,383 |

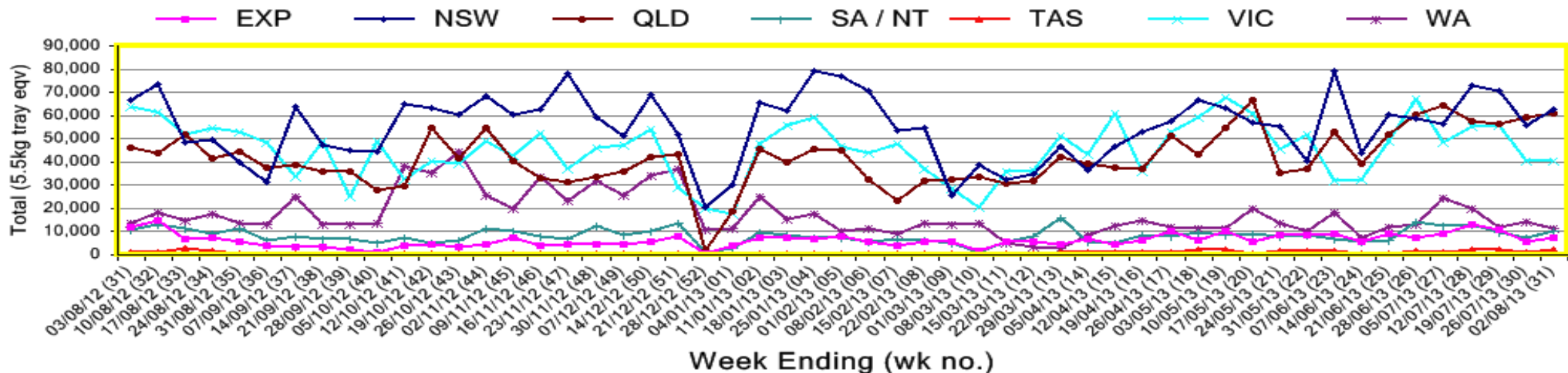
Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 5,316,482 5.5kg tray eqv



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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 5,316,482 5.5kg tray eqv



Week 31 contributors - Packhouses

- Coastal Avocados (CNSW)
- I & A Tolson (CNSW)
- Midcoast Avocados (CNSW)
- Donovan Family Investment Trust (CQ)
- Simpson Farms Pty Ltd (CQ)
- Sunny Bluff Produce Pty Ltd (CQ)
- Sunnyspot Packhouse Pty Ltd (CQ, SQ, SC)
- SuperPak (CQ)
- The Avolution (CQ, SQ)
- Balmoral Orchard (SQ)
- Googa Farms (SQ)
- Green Nugget Orchards (SQ)
- Mountain Fresh (SQ)
- One Harvest (SQ)
- Touchwood Farming (SQ)
- Wodonga Park Fruit and Nuts (SQ)
- Natures Fruit Company (SC)
- Sunfresh (SC)
- Tamborine/Northern Rivers**
- Less than 3 packhouse contributors
- Tri State**
- Less than 3 packhouse contributors
- WA/NT**
- Less than 3 packhouse contributors

Week 31 contributors - Wholesalers

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

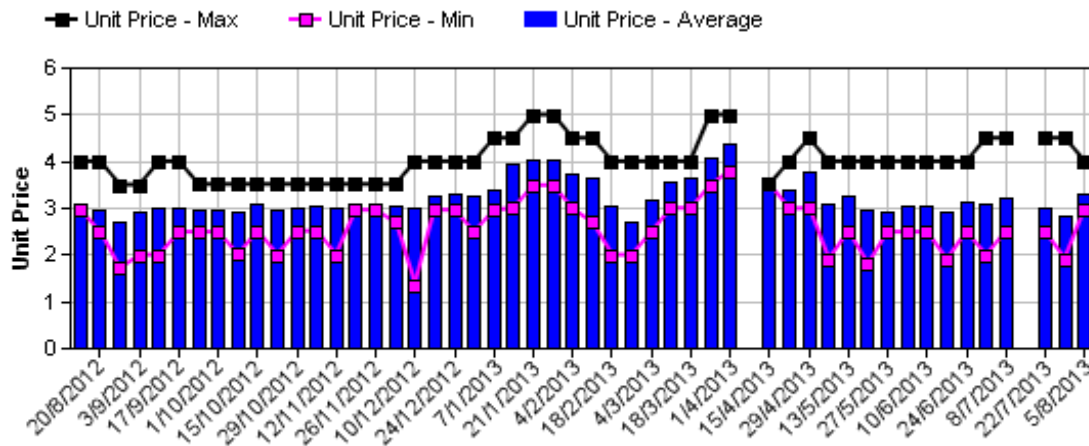
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

| | 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 | 4,919 | | 800 | 5,719 | | | | | | 11,040 | | | | 11,040 | 2,007 | 6,926 | | 800 | 7,726 |
| Total non supermarket sales | 4,773 | | | 4,773 | 2,618 | | | 2,618 | 4,760 | | | | | | 9,533 | | | 9,533 | |
| Total exports | | | | | | | | | | | | | | | | | | | |
| Total sales | 9,692 | | 800 | 10,492 | 2,618 | | | 2,618 | 4,760 | 11,040 | | | 11,040 | 2,007 | 16,459 | | 800 | 17,259 | |
| Total Stock on Hand | 1,288 | | | 1,288 | 1,093 | | | 1,093 | 1,987 | | | | | | 3,275 | | | 3,275 | |
| QLD | | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 11,749 | | 7,656 | 19,405 | | | | | | 4,320 | | | 4,320 | 785 | 12,534 | | 7,656 | 20,190 | |
| Total non supermarket sales | 15,821 | | | 15,821 | 2,185 | | | 2,185 | 3,973 | | | | | | 19,794 | | | 19,794 | |
| Total exports | 2,896 | | | 2,896 | 1,344 | | 960 | 2,304 | 4,189 | | | | | | 5,340 | | 1,745 | 7,085 | |
| Total sales | 30,466 | | 7,656 | 38,122 | 3,529 | | 960 | 4,489 | 8,162 | 4,320 | | | 4,320 | 785 | 37,668 | | 9,401 | 47,069 | |
| Total Stock on Hand | 21,812 | | | 21,812 | 988 | | | 988 | 1,796 | | | | | | 23,608 | | | 23,608 | |
| SA & TAS | | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 7,362 | | | 7,362 | | | 80 | 80 | 145 | | | | | | 7,362 | | 145 | 7,507 | |
| Total non supermarket sales | 4,386 | | | 4,386 | 1,003 | | | 1,003 | 1,824 | | | | | | 6,210 | | | 6,210 | |
| Total exports | | | | | | | | | | | | | | | | | | | |
| Total sales | 11,748 | | | 11,748 | 1,003 | | 80 | 1,083 | 1,969 | | | | | | 13,572 | | 145 | 13,717 | |
| Total Stock on Hand | 8,241 | 24 | | 8,265 | 2,108 | | | 2,108 | 3,833 | | | | | | 12,074 | 24 | | 12,098 | |
| VIC | | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 6,917 | | | 6,917 | 96 | | | 96 | 175 | 10,560 | | | 10,560 | 1,920 | 9,012 | | | 9,012 | |
| Total non supermarket sales | 8,490 | | 3,802 | 12,292 | 2,547 | | 1,147 | 3,694 | 6,716 | 99 | | | 99 | 18 | 13,138 | | 5,888 | 19,026 | |
| Total exports | | | | | | | | | | | | | | | | | | | |
| Total sales | 15,407 | | 3,802 | 19,209 | 2,643 | | 1,147 | 3,790 | 6,891 | 10,659 | | | 10,659 | 1,938 | 22,150 | | 5,888 | 28,038 | |
| Total Stock on Hand | 11,610 | | 3,902 | 15,512 | 3,089 | | 1,049 | 4,138 | 7,524 | 34 | | | 34 | 6 | 17,233 | | 5,809 | 23,042 | |
| WA | | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 2,424 | | | 2,424 | 40 | | | 40 | 73 | | | | | | 2,497 | | | 2,497 | |
| Total non supermarket sales | 3,952 | | | 3,952 | 1,907 | | 69 | 1,976 | 3,593 | | | | | | 7,419 | | 125 | 7,545 | |
| Total exports | | | | | | | | | | | | | | | | | | | |
| Total sales | 6,376 | | | 6,376 | 1,947 | | 69 | 2,016 | 3,665 | | | | | | 9,916 | | 125 | 10,041 | |
| Total Stock on Hand | 3,903 | | | 3,903 | 2,056 | | 67 | 2,123 | 3,860 | | | | | | 7,641 | | 122 | 7,763 | |
| Total | | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 33,371 | | 8,456 | 41,827 | 136 | | 80 | 216 | 393 | 25,920 | | | 25,920 | 4,713 | 38,331 | | 8,601 | 46,932 | |
| Total non supermarket sales | 37,421 | | 3,802 | 41,224 | 10,260 | | 1,216 | 11,476 | 20,865 | 99 | | | 99 | 18 | 56,094 | | 6,013 | 62,107 | |
| Total exports | 2,896 | | | 2,896 | 1,344 | | 960 | 2,304 | 4,189 | | | | | | 5,340 | | 1,745 | 7,085 | |
| Total sales | 73,688 | | 12,258 | 85,946 | 11,740 | | 2,256 | 13,996 | 25,447 | 26,019 | | | 26,019 | 4,731 | 99,764 | | 16,360 | 116,124 | |
| Total Stock on Hand | 46,854 | 24 | 3,902 | 50,780 | 9,334 | | 1,116 | 10,450 | 19,000 | 34 | | | 34 | 6 | 63,831 | 24 | 5,931 | 69,787 | |

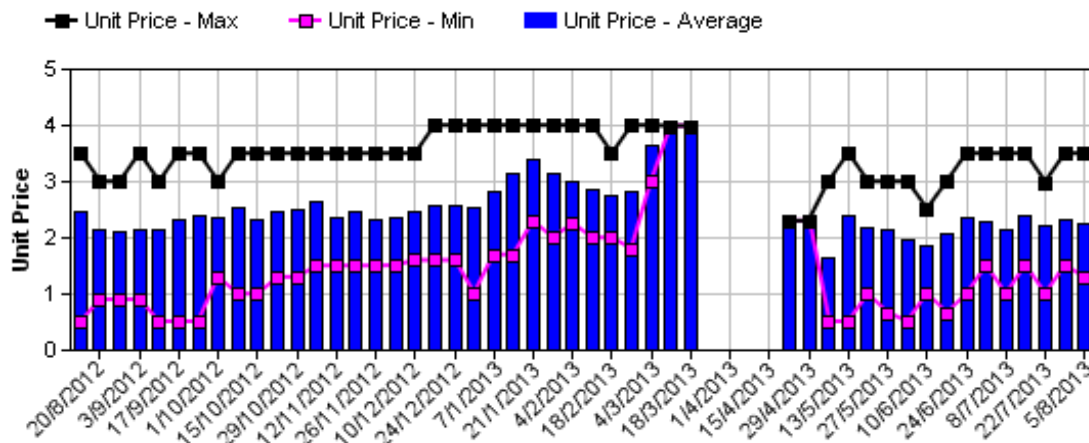
Weekly National Sales



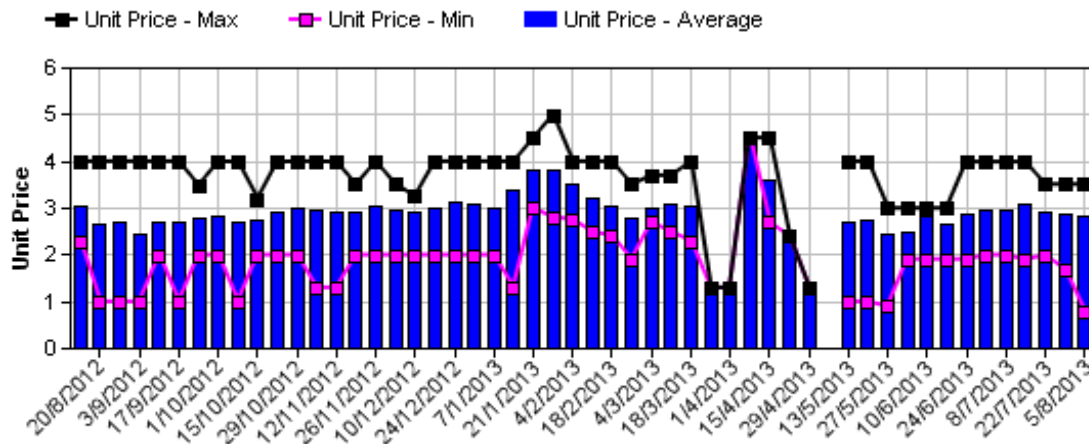
Hass Avocado Average Retail Prices - Sydney



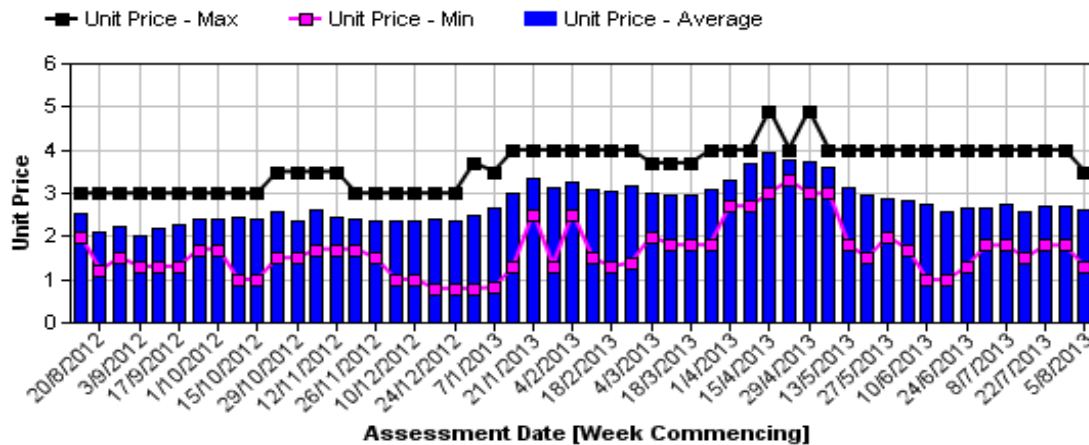
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

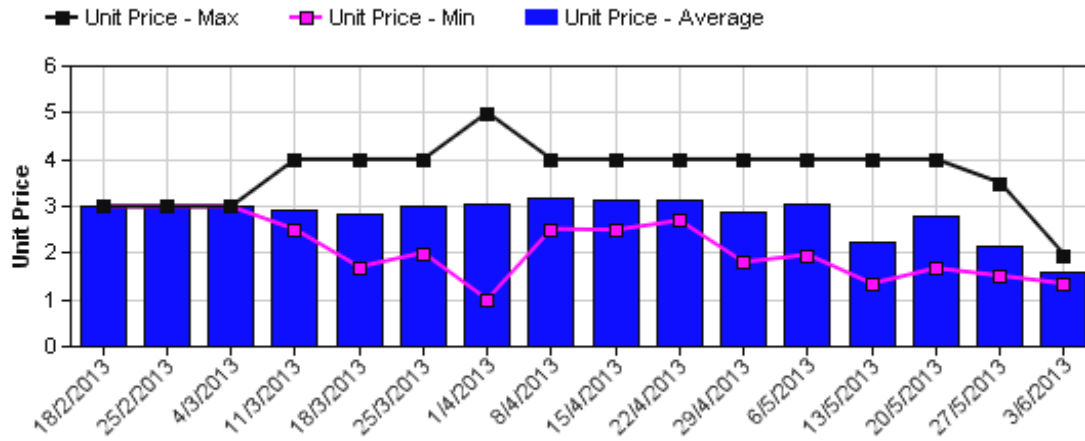


Hass Avocado Average Retail Prices - Perth

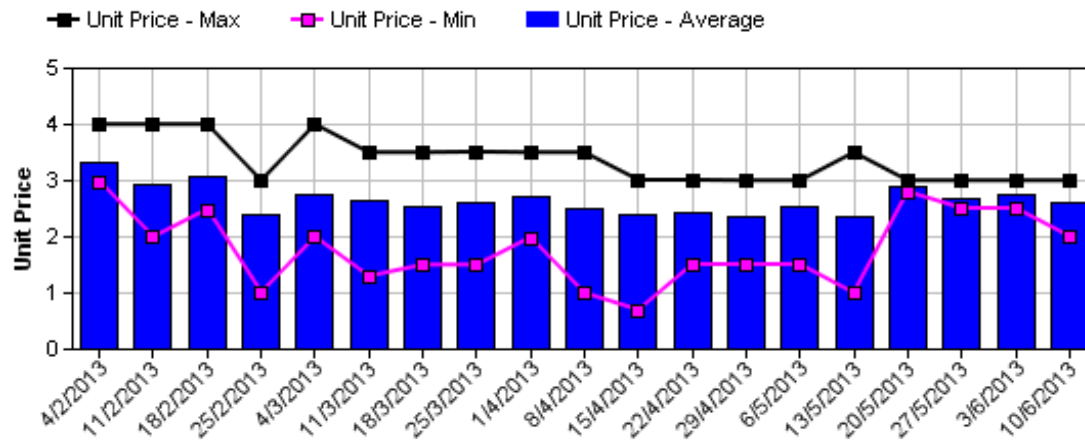


Assessment Date [Week Commencing]

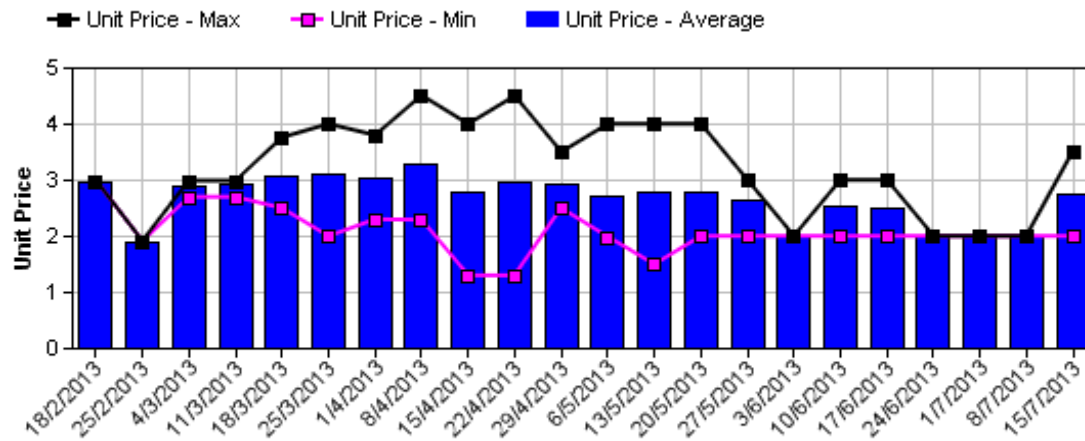
Shepard Avocado Average Retail Prices - Sydney



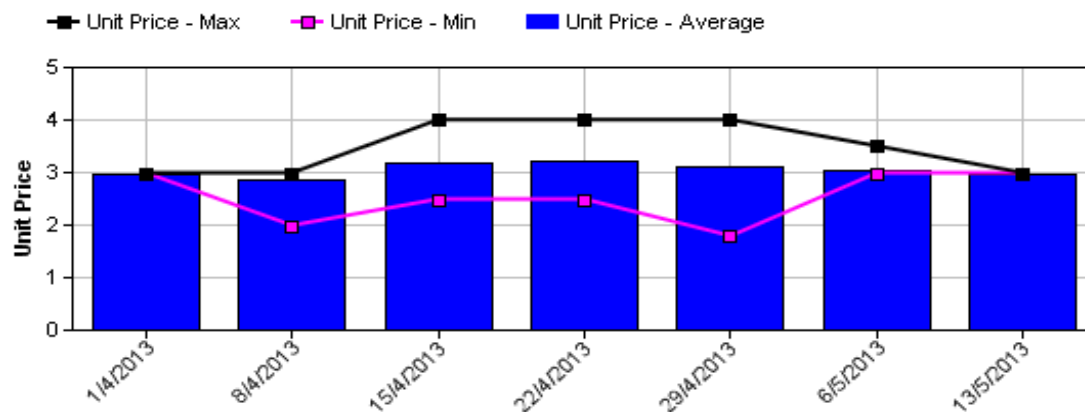
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety - 5th August 2013

| Store | Var | Av Wt (g) | Unit Price | Special | Country of Origin | Store | Var | Av Wt (g) | Unit Price | Special | Country of Origin |
|-----------------|------|-----------|------------|---------|-------------------|------------------|------|-----------|------------|---------|-------------------|
| SYDNEY | | | | | | MELBOURNE | | | | | |
| IGA | Hass | 260 | 2.95 | No | Aus | I | Hass | 210 | 0.79 | No | NS |
| Woolworths | Hass | 280 | 2.98 | No | Aus | I | Hass | 240 | 1.99 | No | NS |
| Coles | Hass | 280 | 2.98 | No | Aus | I | Hass | 267 | 1.99 | No | Aus |
| Woolworths | Hass | 260 | 2.98 | No | Aus | I | Hass | 270 | 2.49 | No | NS |
| Coles | Hass | 290 | 2.98 | No | Aus | Coles | Hass | 290 | 2.98 | No | Aus |
| Coles | Hass | 270 | 2.98 | No | Aus | Coles | Hass | 285 | 2.98 | No | Aus |
| Woolworths | Hass | 260 | 2.98 | No | Aus | Safeway | Hass | 230 | 2.98 | No | Aus |
| I | Hass | 270 | 2.99 | No | Aus | Safeway | Hass | 270 | 2.98 | No | Aus |
| Foodworks | Hass | 280 | 2.99 | No | Aus | Coles | Hass | 280 | 2.98 | No | Aus |
| I | Hass | 270 | 2.99 | No | Aus | Safeway | Hass | 244 | 2.98 | No | Aus |
| I | Hass | 250 | 2.99 | No | Aus | IS | Hass | 255 | 2.99 | No | Aus |
| I | Hass | 300 | 3.99 | No | Aus | IGA | Hass | 270 | 2.99 | No | Aus |
| IGA | Hass | 250 | 3.99 | No | Aus | I | Hass | 275 | 3.48 | No | Aus |
| I | Hass | 320 | 3.99 | No | Aus | I | Hass | 284 | 3.49 | No | Aus |
| I | Hass | 330 | 3.99 | No | Aus | I | Hass | 280 | 3.50 | No | NS |
| I | Hass | 300 | 3.99 | No | Aus | I | Hass | 305 | 3.50 | No | NS |
| BRISBANE | | | | | | PERTH | | | | | |
| IGA | Hass | 180 | 1.29 | Cat | Aus | I | Hass | 180 | 1.28 | Store | Aus |
| I | Hass | 0.9 | 1.50 | Store | Aus | IS | Hass | 220 | 1.99 | Store | Aus |
| I | Hass | 225 | 1.50 | Store | Aus | Woolworths | Hass | 220 | 2.48 | No | Aus |
| I | Reed | 230 | 1.79 | Store | Aus | Woolworths | Hass | 210 | 2.48 | No | Aus |
| Woolworths | Hass | 180 | 1.98 | No | Aus | Coles | Hass | 230 | 2.48 | No | Aus |
| I | Hass | 240 | 1.99 | Store | Aus | Coles | Hass | 210 | 2.48 | No | Aus |
| I | Hass | 140 | 1.99 | No | Aus | Woolworths | Hass | 220 | 2.48 | Store | Aus |
| IGA | Hass | 175 | 1.99 | Store | Aus | Coles | Hass | 245 | 2.48 | No | Aus |
| Coles | Reed | 600 | 2.48 | Cat | Aus | I | Hass | 245 | 2.50 | No | Aus |
| Coles | Hass | 200 | 2.48 | Cat | Aus | IGA | Hass | 250 | 2.79 | No | Aus |
| Coles | Reed | 340 | 2.48 | Cat | Aus | I | Hass | 270 | 2.99 | No | Aus |
| Coles | Reed | 440 | 2.48 | Cat | Aus | IGA | Hass | 250 | 2.99 | No | Aus |
| IGA | Hass | 190 | 2.48 | No | Aus | I | Hass | 260 | 2.99 | No | Aus |
| I | Hass | 230 | 2.50 | Store | Aus | I | Hass | 240 | 3.49 | No | Aus |
| I | Hass | 280 | 2.50 | Store | Aus | IGA | Hass | 255 | 3.49 | No | Aus |
| Woolworths | Hass | 185 | 2.98 | No | Aus | | | | | | |
| Woolworths | Hass | 200 | 2.98 | No | Aus | | | | | | |
| I | Hass | 320 | 3.49 | Store | 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