



INFOCADO WEEKLY REPORT: 4th — 10th August 2012 (Wk 32)



Comments

- Fruit volumes from Central Queensland are forecast to reduce significantly as we come out of August into September
- It is forecast that there will be New Zealand fruit coming into the market every week from now on although starting with quite low volumes. The New Zealand dispatches to date are included on page 3. You can also track the proportion of New Zealand fruit entering the market by looking at the graph on page 2 (look for volume above the black line).
- New Zealand fruit has not been on display in any of the retail price survey stores yet this season (based on signage and stickers).
- There are no catalogue specials in the major supermarkets this week.
- A reminder that if there are not 3 packhouses contributing from any one growing region in a given week then the names of those packhouses who have contributed will not be listed in the contributors list - to safeguard confidentiality of data. If you have contributed data but your name does not appear then this will be the reason. This may also be the reason that a packer you know to be packing may be absent from the contributors list.
- Anyone with feedback regarding the Wholesaler Accreditation Draft Plan should contact Avocados Australia Program Manager Julie Petty on 07 3646 6566 or supplychain@avocado.org.au

What you need to be aware of for next month

- The 2012/2013 HAL marketing and promotional campaign is a continuation of the 2011/2012 objectives. The goal is to bring about behavioural change ie increasing purchase frequency. This goal was based off the predicted bumper crop in 2012 and recent Australian Grown Research which was undertaken to better understand the impact of imports. Steps have been taken to position Australian avocados as 'fresher' and 'less travelled/handled' as these messages are claimed to resonate with consumers. For all 2012/2013 promotional materials, the new Australian Avocado Kangaroo logo will be included to call consumers to 'buy Australian'. Information on season and supply will also be communicated.
- The consumer homepage has been refreshed and an official Avocados Australia blog 'The Daily Spread' has been launched. Weekly updates will be included on the blog to update subscribers about the latest avocado activities. Check it out [here](#).
- For more information on these and other marketing and promotional news items, check out the [July Australian Avocados Marketing Program Update](#).
- Based off the July 2012 Quarterly Report 736,575 5.5kg eqv trays are expected in the market place for September. 710,062 5.5kg eqv trays are expected for Hass with the remainder being other varieties.

Upcoming Holidays

QLD Royal Brisbane Show 15 August | QLD Queens Birthday 1 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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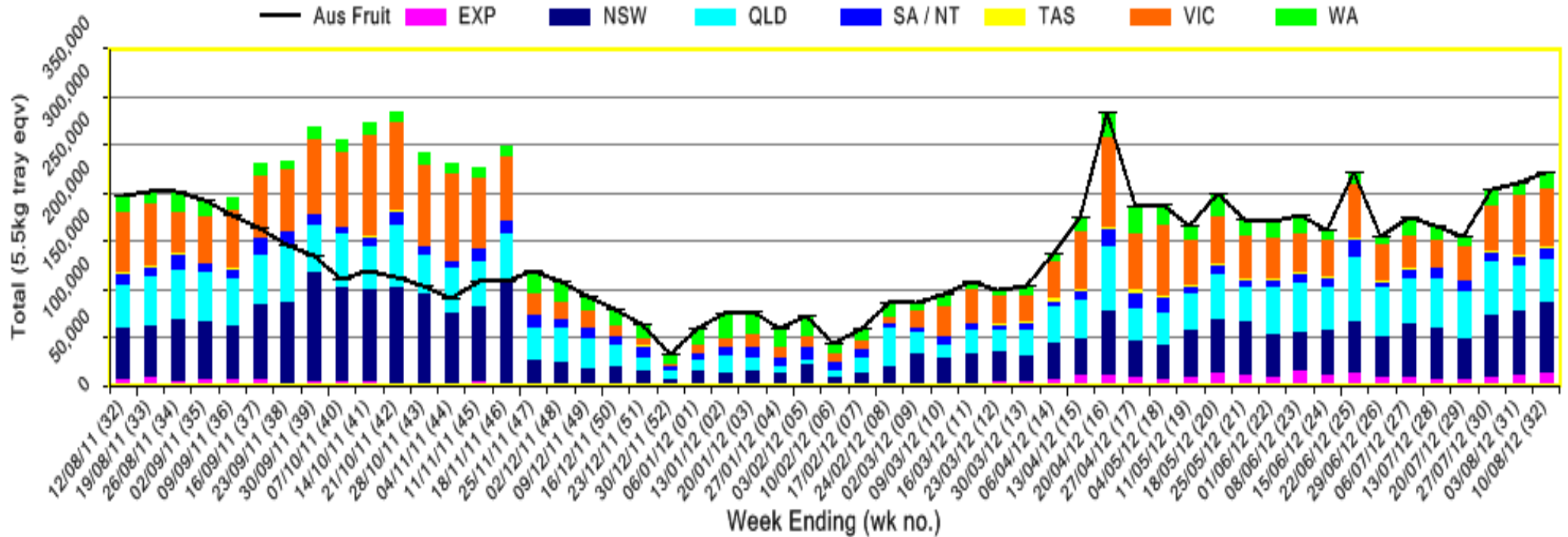
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Industry Dispatches By Destination State and Count Size : 4th August - 10th August 2012 (Wk 32)

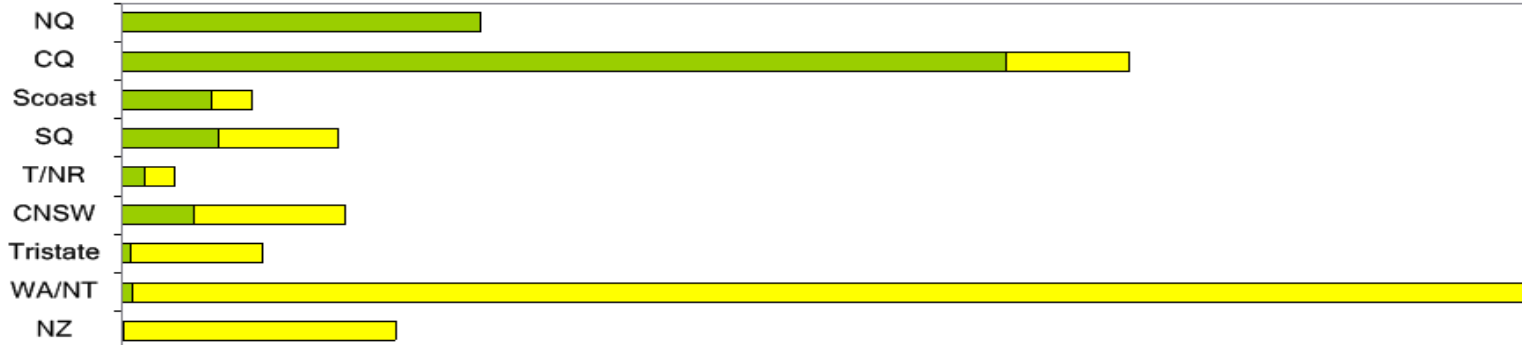
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP			63	669		50		4,646	3,329	8,757	3,004	480			14,306
NSW	1,312	3,418	6,114	15,274	1,692	11,307	15,055	1,712	888	56,772	8,679	2,700		1,000	73,225
QLD	264	197	1,623	2,860	1,647	5,226	9,527	7,059	1,628	30,031	6,257	5,390	4,700		43,242
SA / NT			1,874	2,558	90	553	1,170	2,446	171	8,862	2,021	180			12,570
TAS								768		768					768
VIC	8,127	1,564	6,499	12,489	626	6,341	4,344	2,241	566	42,797	9,676	4,248			61,162
WA		41	343	1,341		4,066	5,241	2,475	54	13,561	2,331				17,799
Total	9,703	5,220	16,516	35,191	4,055	27,543	36,105	20,579	6,636	161,548	31,968	12,998	4,700	1,000	223,072

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2012 to date = 4,517,712 5.5kg tray eqv

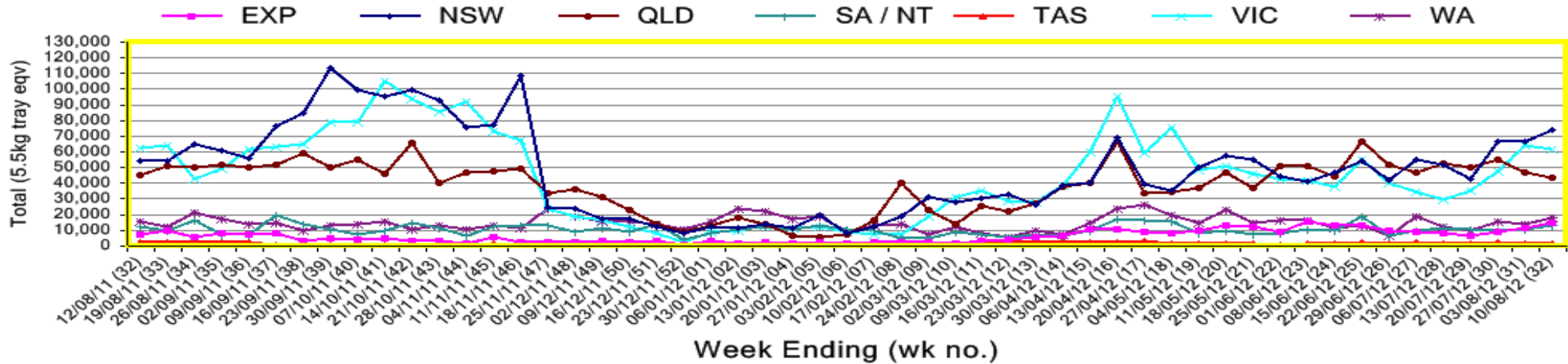


Percentage dispatched by region (Based on seasonal forecast - 2012)

■ 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 2012 to date = 4,517,712 5.5kg tray eqv



Week 32 contributors - Packhouses

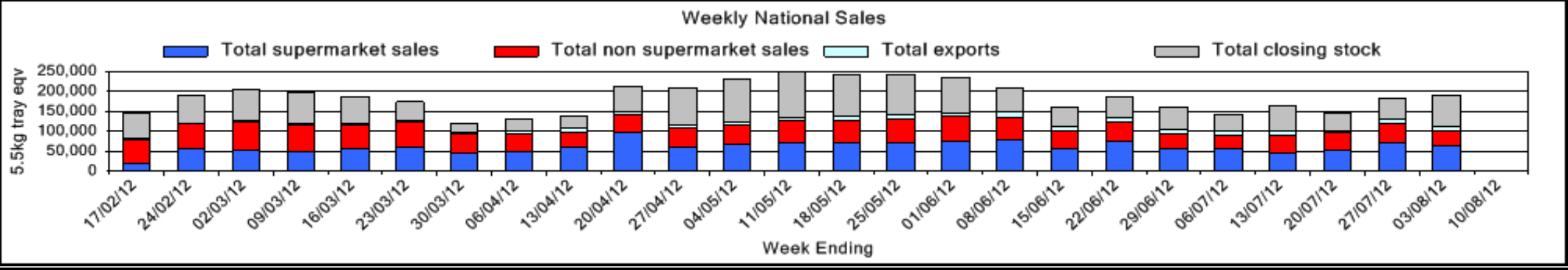
- | | |
|-----------------------------------|--------------------------------|
| Aussie Orchards Growers & Packers | Natures Fruit Company |
| Avocado Industry Council (NZAGA) | One Harvest |
| Avowest | Perseverance Farming Co |
| Balmoral Orchard | Simpson Farms Pty Ltd |
| Coastal Avocados | Summerland House With No Steps |
| Delroy Orchards | Sunfresh |
| Donovan Family Investment Trust | Sunnyspot Packhouse Pty Ltd |
| Green Nugget Orchards | SuperPak |
| Green Pear Avocado | The Avocado Grove |
| I & A Tolson | Touchwood Farming |
| Jirel Holdings | Wodonga Park Fruit and Nuts |
| Midcoast Avocados | |

Week 32 contributors - Wholesalers

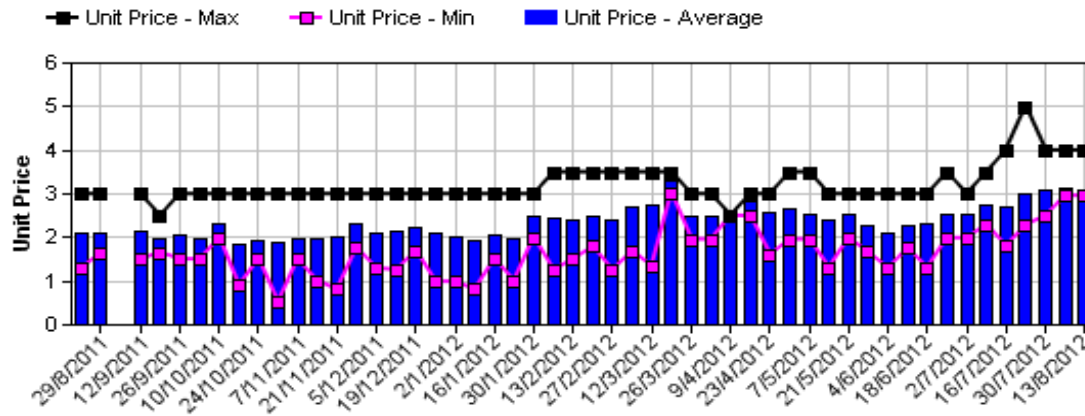
- | | |
|---------------------------------------|---|
| Allcrops Pty Ltd (Sydney) | Kelly's (Melbourne) |
| Costa Farms (Adelaide) | Murray Bros (Brisbane) |
| Costa Farms (Melbourne) | Sculli & Co Pty Ltd (Melbourne) |
| Costa Farms (Perth) | Sinclair & Antico (Aust) Pty Ltd (Sydney) |
| Dykes Bros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

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

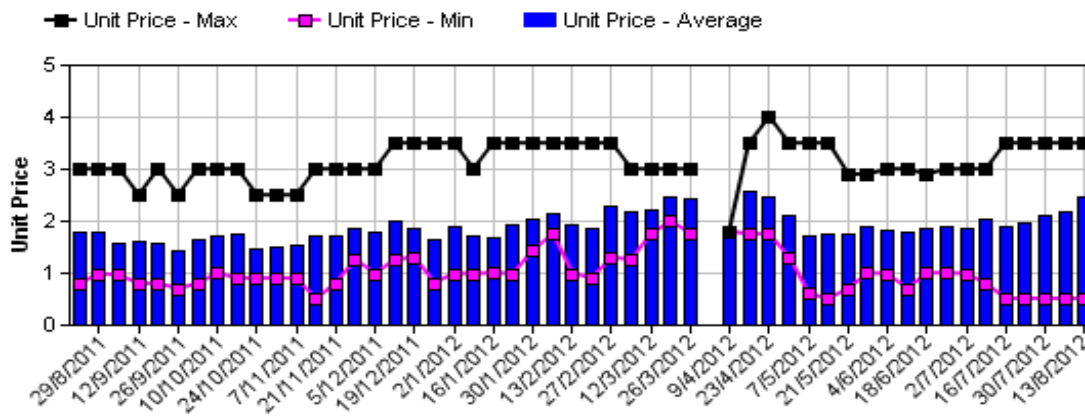
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	14,728		2,879	17,607						648			648	118	14,846		2,879	17,725
Total non supermarket sales	5,198		62	5,260	2,030		200	2,230	4,055						8,889		425	9,314
Total exports																		
Total sales	19,926		2,940	22,866	2,030		200	2,230	4,055	648			648	118	23,735		3,304	27,039
Total Stock on Hand	3,121			3,121	1,174		400	1,574	2,862						5,256		727	5,983
QLD																		
Total supermarket sales					Full data set not displayed as not enough QLD wholesalers contributed data this week.													
Total non supermarket sales					Full data set not displayed as not enough QLD wholesalers contributed data this week.													
Total exports					Full data set not displayed as not enough QLD wholesalers contributed data this week.													
Total sales	28,966		1,685	30,651	3,448		145	3,593	6,533	3,720			3,720	676	35,911		1,949	37,860
Total Stock on Hand					Full data set not displayed as not enough QLD wholesalers contributed data this week.													
SA & TAS																		
Total supermarket sales	6,277		1,406	7,683			294	294	535	180			180	33	6,310		1,941	8,251
Total non supermarket sales	2,591		198	2,789	2,657		82	2,739	4,980						7,422		347	7,769
Total exports																		
Total sales	8,868		1,604	10,472	2,657		376	3,033	5,515	180			180	33	13,732		2,288	16,020
Total Stock on Hand	9,466		778	10,244	1,455		1,299	2,754	5,007						12,111		3,140	15,251
VIC																		
Total supermarket sales	7,483		6,898	14,381						2,880			2,880	524	8,007		6,898	14,904
Total non supermarket sales	5,768		1,727	7,495	1,307		202	1,509	2,744	167		16	183	33	8,175		2,097	10,272
Total exports																		
Total sales	13,251		8,625	21,876	1,307		202	1,509	2,744	3,047		16	3,063	557	16,181		8,995	25,176
Total Stock on Hand	18,332		1,925	20,258	5,573		454	6,027	10,958	43			43	8	28,473		2,751	31,224
WA																		
Total supermarket sales	1,540			1,540											1,540			1,540
Total non supermarket sales	2,712			2,712	1,522		5	1,527	2,776						5,479		9	5,488
Total exports																		
Total sales	4,252			4,252	1,522		5	1,527	2,776						7,019		9	7,028
Total Stock on Hand	3,442			3,442	2,391			2,391	4,347						7,789			7,789
Total																		
Total supermarket sales	34,654		12,294	46,948	133		294	427	776	6,948			6,948	1,263	36,159		12,828	48,987
Total non supermarket sales	32,426		1,987	34,413	7,972		489	8,461	15,384	167		16	183	33	46,951		2,879	49,830
Total exports	8,183		574	8,757	2,859		145	3,004	5,462	480			480	87	13,468		838	14,306
Total sales	75,263		14,855	90,117	10,964		928	11,892	21,622	7,595		16	7,611	1,384	96,578		16,545	113,123
Total Stock on Hand	60,904		2,703	63,608	11,190		2,153	13,343	24,260	43			43	8	81,257		6,618	87,875



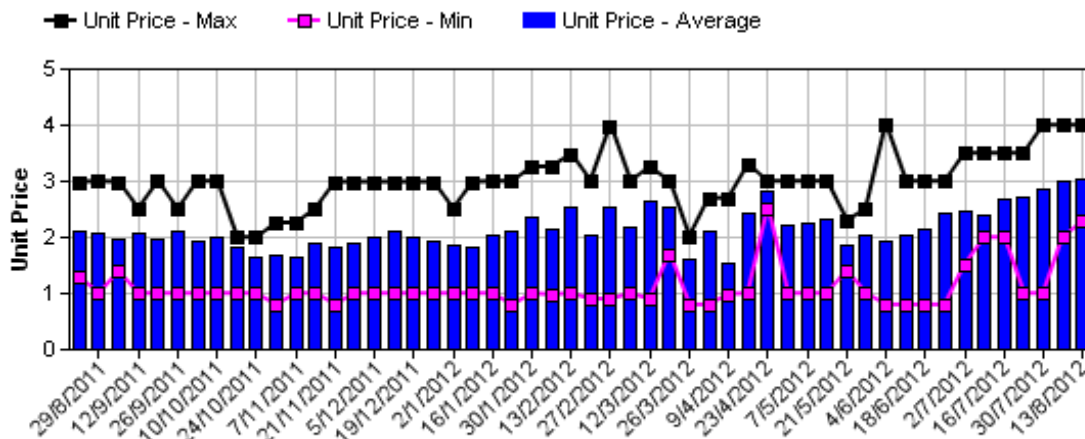
Hass Avocado Average Retail Prices - Sydney



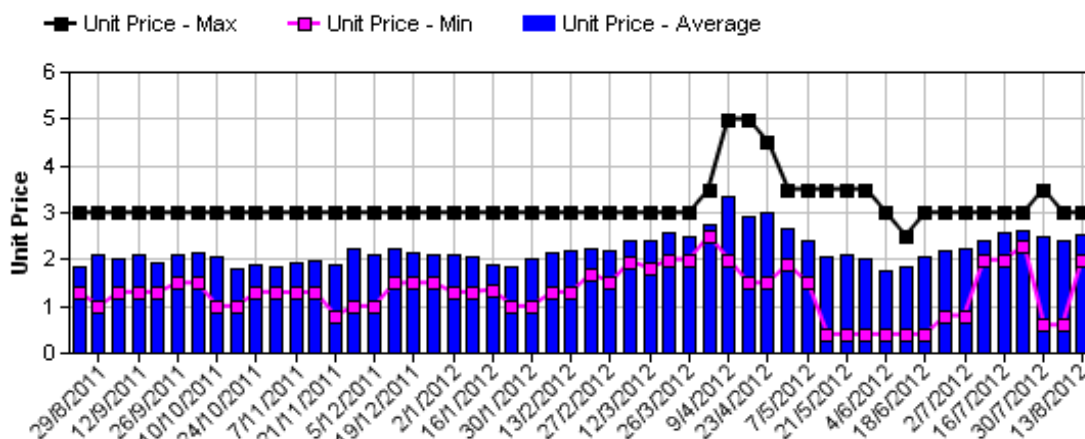
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

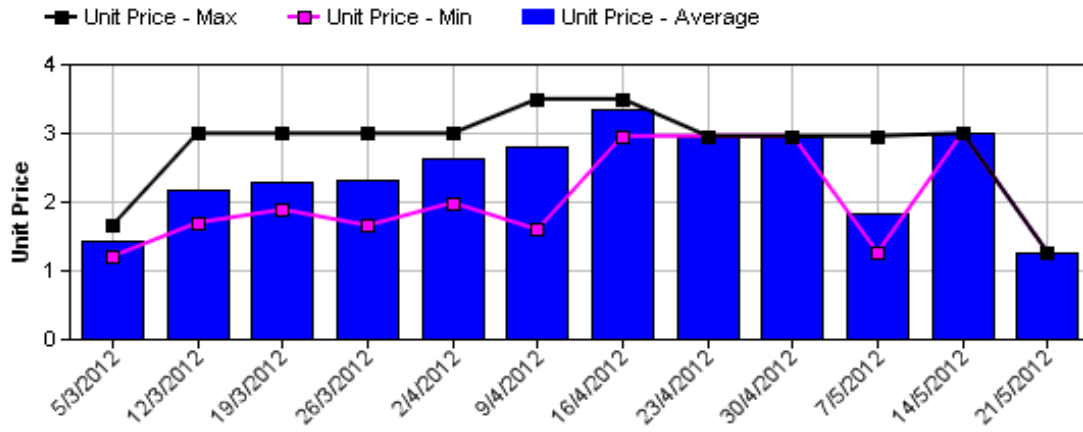


Hass Avocado Average Retail Prices - Perth

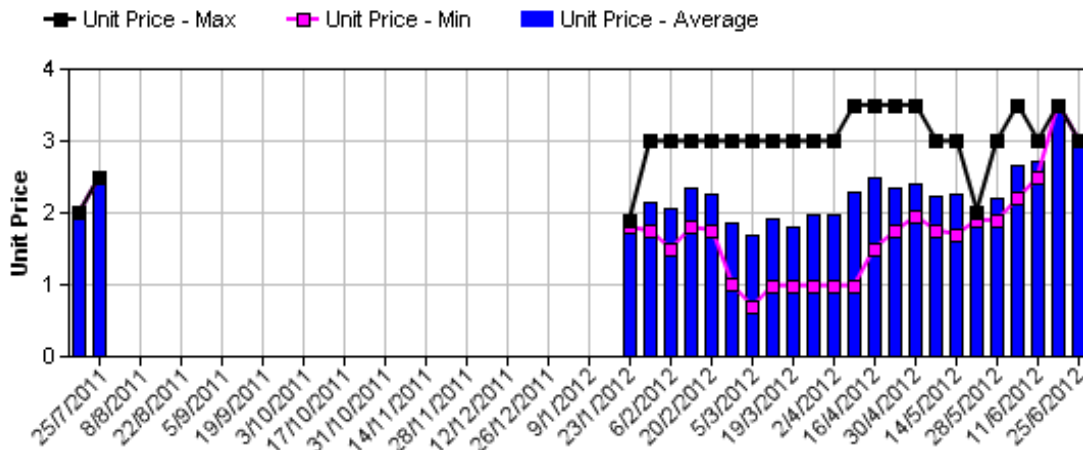


Assessment Date [Week Commencing]

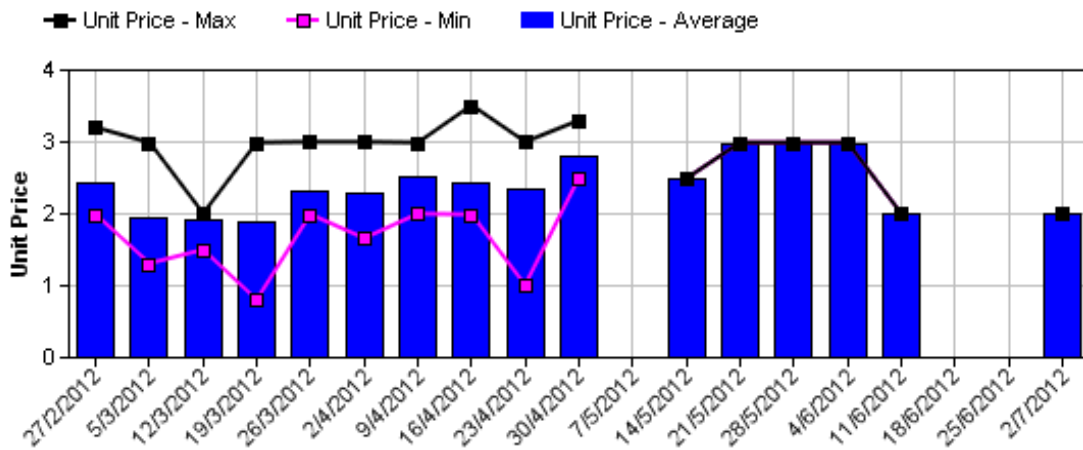
Shepard Avocado Average Retail Prices - Sydney



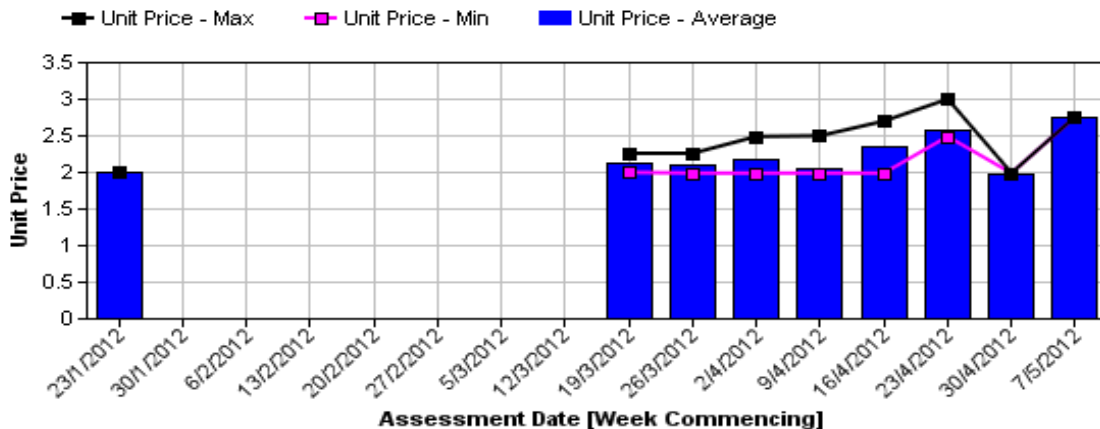
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Retail Prices by City, Store and Variety - 13th August 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
I	Reed	415	1.5	Store	Aus
I	Hass	185	1.66	No	Aus
IGA	Hass	185	1.95	No	Aus
I	Hass	190	1.99	No	Aus
Foodworks	Hass	205	1.99	No	Aus
I	Reed	480	2.49	No	Aus
IGA	Hass	265	2.95	No	Aus
Woolworths	Hass	265	2.98	No	Aus
Coles	Hass	250	2.98	No	Aus
Woolworths	Hass	290	2.98	No	Aus
Coles	Hass	250	2.98	No	Aus
Coles	Hass	265	2.98	No	Aus
Woolworths	Hass	305	2.98	No	Aus
Coles	Hass	230	2.98	No	Aus
Coles	Reed	370	2.98	No	Aus
Coles	Hass	240	2.98	No	Aus
I	Hass	260	2.99	No	Aus
I	Hass	220	2.99	No	Aus
I	Hass	210	2.99	No	Aus
I	Hass	250	2.99	No	Aus
I	Reed	430	2.99	No	Aus
I	Hass	275	2.99	No	Aus
IGA	Hass	210	2.99	No	Aus
Foodworks	Hass	300	2.99	No	Aus
I	Hass	270	2.99	No	Aus
I	Hass	245	3.29	No	Aus
I	Hass	265	3.49	No	Aus
I	Reed	455	3.49	No	Aus
I	Reed	435	3.99	No	Aus
I	Hass	240	3.99	No	Aus
I	Hass	310	3.99	No	Aus
BRISBANE					
I	Hass	88	0.5	Store	Aus
I	Hass	190	0.79	Store	Aus
Woolworths	Reed	285	1.75	No	Aus
Woolworths	Hass	200	1.98	No	Aus
I	Reed	465	1.99	Store	Aus
Coles	Hass	210	2.28	No	Aus
Coles	Hass	240	2.28	No	Aus
Woolworths	Hass	265	2.28	No	Aus
Woolworths	Hass	180	2.28	No	Aus
Coles	Hass	280	2.28	No	Aus
Coles	Reed	340	2.48	No	Aus
Coles	Reed	350	2.48	No	Aus
IGA	Hass	220	2.48	No	Aus
Coles	Reed	400	2.48	No	Aus
IGA	Hass	240	2.49	No	Aus
IGA	Hass	205	2.49	No	Aus
I	Hass	240	2.5	Store	Aus
I	Hass	260	2.99	No	Aus
I	Hass	230	2.99	Store	NS
I	Hass	275	2.99	No	Aus
I	Hass	280	2.99	Store	Aus
I	Hass	290	3.49	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	225	0.99	Store	NS
I	Hass	260	2.29	No	NS
I	Hass	242	2.4	No	Aus
I	Hass	165	2.49	No	NS
Safeway	Hass	285	2.9	No	Aus
Safeway	Hass	300	2.98	No	Aus
Coles	Hass	275	2.98	No	Aus
Safeway	Hass	270	2.98	No	Aus
Coles	Hass	280	2.98	No	Aus
I	Hass	245	2.99	No	Aus
I	Hass	286	2.99	No	Aus
IGA	Hass	255	2.99	No	Aus
I	Hass	290	3.25	No	Aus
I	Hass	315	3.25	No	Aus
I	Hass	305	3.98	No	Aus
I	Hass	260	3.99	No	Aus
PERTH					
I	Hass	145	0.99	No	Aus
I	Hass	230	1.99	Store	Aus
IS	Hass	190	1.99	Store	Aus
Woolworths	Hass	195	2.48	Store	Aus
Woolworths	Hass	200	2.48	No	Aus
Coles	Hass	220	2.48	No	Aus
Woolworths	Hass	200	2.48	No	Aus
Coles	Hass	205	2.48	No	Aus
Coles	Hass	210	2.48	No	Aus
I	Hass	235	2.49	No	Aus
IGA	Hass	220	2.49	No	Aus
IGA	Hass	190	2.49	No	Aus
I	Hass	215	2.49	No	Aus
IGA	Hass	230	2.99	No	Aus
I	Hass	225	2.99	No	Aus
I	Hass	240	2.99	No	Aus
IGA	Hass	255	2.99	No	Aus
IS	Hass	240	3.49	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