



## INFOCADO WEEKLY REPORT: 9th — 15th August 2014 (Wk 33)



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### Comments

- The average retail price per Hass avocado continued to remain steady, Brisbane being the exception with prices gently rising (refer page 6 & 7). The weekly national sales have displayed similar levels of throughput to last week as well (refer page 5).
- The four weekly forecast has began to trend upwards with a moderate volume of avocados in the interim. AAL would like to remind all contributing packhouses to update their four weekly forecast as the year progresses especially when the industry is expecting to move into a high production phase (refer page 3).
- A steady stream of avocados continue to be dispatched from NZ with volumes similar to the last 2 weeks (refer page 2).

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

The 29th International Horticultural Congress (IHC2014) will be held in Brisbane on 17 - 22 August 2014 at the Brisbane Convention Centre. The theme is "Sustaining Lives, Livelihoods and Landscapes". This is the first time this Congress has been held in the southern hemisphere.

### Changes to Nielsen Reports

As part of Avocados Australia and HAL's commitment to tracking the impact and effectiveness of marketing activities on consumer behaviour and sales, Nielsen data is regularly purchased and analysed. The data is available in four weekly intervals, and once analysed, is reported back to industry via monthly Brand Health reports made available through the Avocados Australia online resource centre.

The data that is used to create the Brand Health reports are from Homescan and Retail Scan-data. The data is captured through some of Australia's largest retailers capturing household behaviour and actual sales. Significant changes have been made to the format of the reports to improve their ease of use and value to industry.

The report changes will dissect available information enabling readers to understand the full extent of information that is currently available. A dynamic monthly report enables user interaction to report on different data sets that change depending on selected criteria such as 'retailer type, package type etc.'. The deeper quarterly report will track the different classes of avocado consumers, aligning the reports with the new consumer segmentation.

### Upcoming Holidays

Queens Birthday (WA): 29th September | Labour Day (QLD, NSW & SA): 6th October | Melbourne Cup (VIC): 4th November |

### 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:

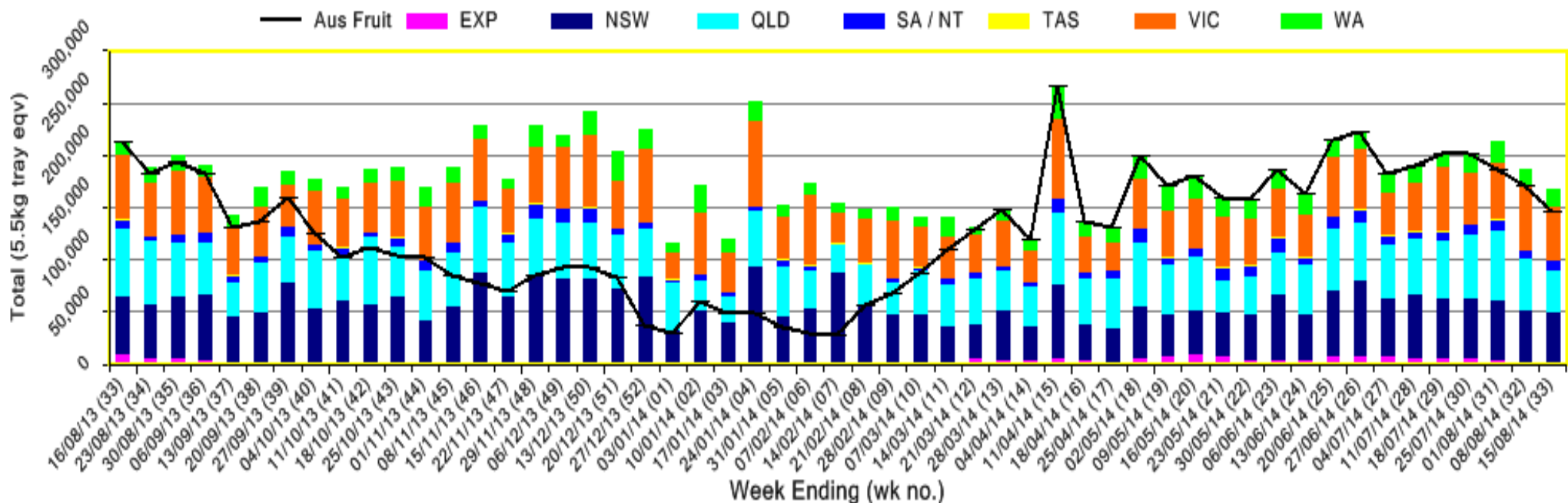
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 9th August - 15th August 2014 (Wk 33)**

Dest. State	5.5kg	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										2,142	2,142				2,142
NSW	5	964	2,843	6,247	176	10,726	10,132	4,052	2,954	38,099	5,143				47,450
QLD	1,108	3,192	1,897	3,726	155	4,160	8,580	9,652	1,148	33,618	3,058	3,120	6,679	40,959	
SA / NT		18	1,162	1,764		304	152	3,438	170	7,008	560	120		8,048	
TAS							640			640				640	
VIC	963	5,514	3,170	5,928	97	11,318	8,612	5,746	3,299	44,647	3,281	1,796		50,939	
WA	9	75	320	2,576		5,046	4,199	3,434		15,659	1,503			18,392	
<b>Total</b>	<b>2,085</b>	<b>9,763</b>	<b>9,392</b>	<b>20,241</b>	<b>428</b>	<b>31,554</b>	<b>32,315</b>	<b>26,322</b>	<b>9,713</b>	<b>141,813</b>	<b>13,545</b>	<b>5,036</b>	<b>6,679</b>	<b>168,570</b>	

**Throughput Australian & NZ avocados by destination state**  
 Throughput 1st January 2014 to date = 5,640,125 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

**Forecast Data (Week 33 - 37)**

Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv

**Week 33 - begin 09/08/2014**

Fuerte		88			160
Gem	620	20			656
Hass	128,495	12,930	3,800	3,000	153,240
Lamb Hass	900	100			1,082
Other	600	20			636
Reed	742				742
Sharwil	600	88			760
<b>Week Total</b>	<b>131,957</b>	<b>13,246</b>	<b>3,800</b>	<b>3,000</b>	<b>157,277</b>

**Week 34 - begin 16/08/2014**

Fuerte		88			160
Gem	620	20			656
Hass	123,765	10,160	3,500	2,000	143,238
<b>Week Total</b>	<b>124,385</b>	<b>10,268</b>	<b>3,500</b>	<b>2,000</b>	<b>144,054</b>

**Week 35 - begin 23/08/2014**

Gem	600	20			636
Hass	131,752	8,160	3,500	1,000	147,406
<b>Week Total</b>	<b>132,352</b>	<b>8,180</b>	<b>3,500</b>	<b>1,000</b>	<b>148,043</b>

**Week 36 - begin 30/08/2014**

Hass	98,309	4,955	3,500	1,000	108,136
<b>Week Total</b>	<b>98,309</b>	<b>4,955</b>	<b>3,500</b>	<b>1,000</b>	<b>108,136</b>

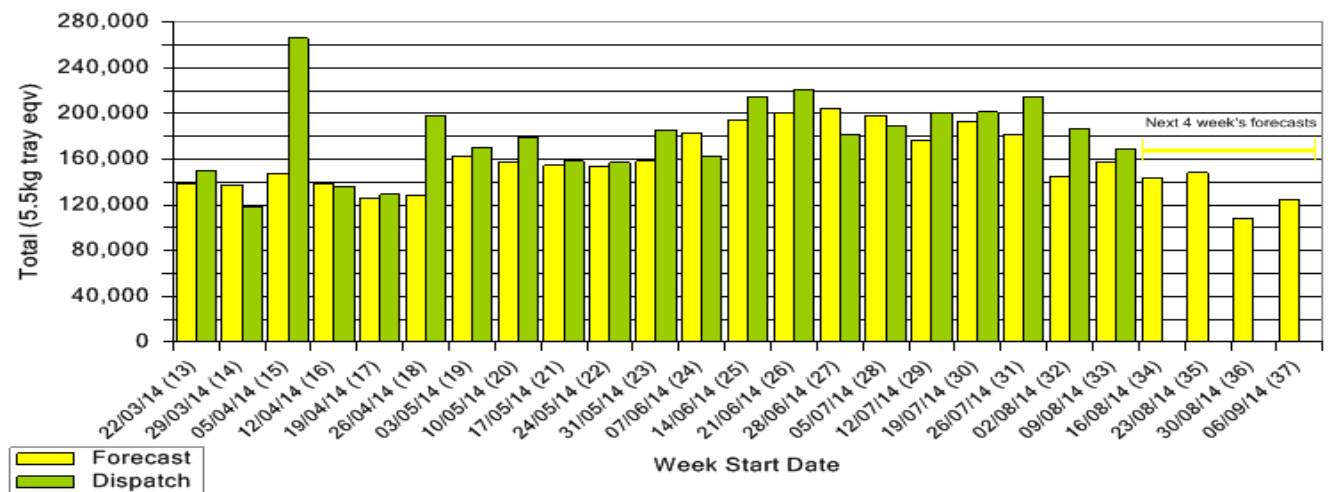
**Week 37 - begin 06/09/2014**

Hass	116,049	4,080	3,500	1,000	124,285
<b>Week Total</b>	<b>116,049</b>	<b>4,080</b>	<b>3,500</b>	<b>1,000</b>	<b>124,285</b>

**Dispatch Data (Week 33 - begin 9/08/2014)**

Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Hass	131,287	13,536	5,036	6,679	158,028
Other	17	9			33
Reed	10,509				10,509
<b>Total</b>	<b>141,813</b>	<b>13,545</b>	<b>5,036</b>	<b>6,679</b>	<b>168,570</b>

Dispatch vs weekly forecast - all varieties and all packs  
(22nd March 2014 to 12th September 2014)

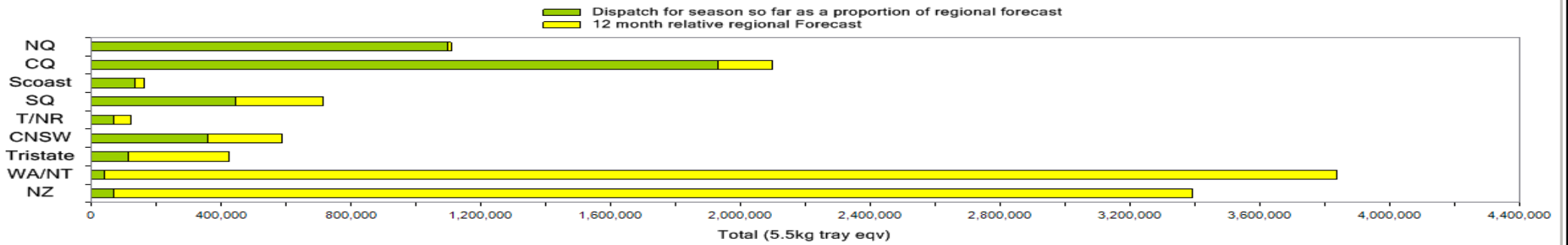


**New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015**

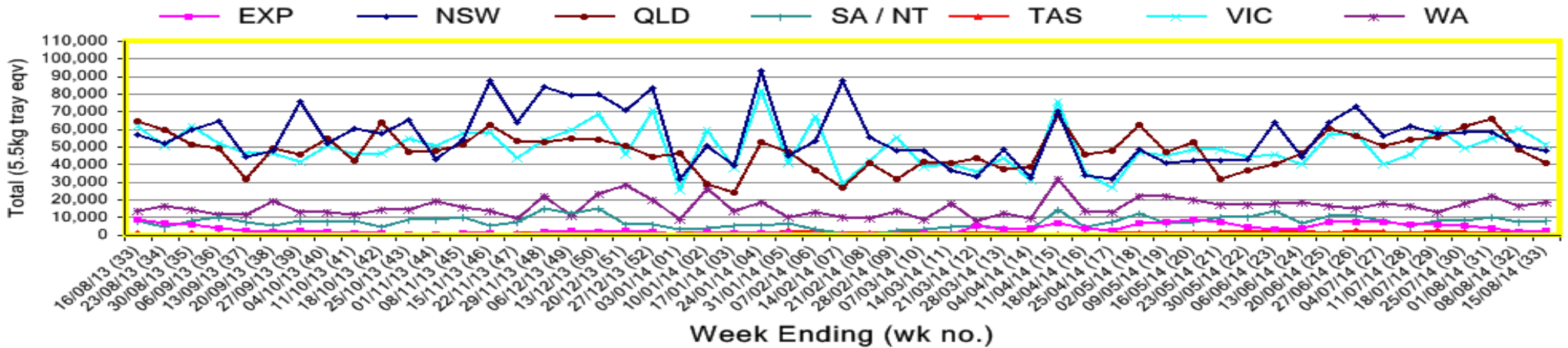
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347
<b>Australia (from Infocado)</b>	69,386									69,386
<b>USA<sup>1</sup></b>										
<b>Japan<sup>1</sup></b>										
<b>Other Asia<sup>1</sup></b>										
<b>Total</b>	<b>69,386</b>									<b>69,386</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 = 5,640,125 5.5kg tray eqv



**Week 33 contributors - Packhouses**

Natures Fruit Company (Consolidator)	Wodonga Park Fruit and Nuts (SQ)
One Harvest (Consolidator)	Chinoola Orchards (TRI)
Sunfresh (Consolidator)	Bonyaricall Vineyards (TRI)
The Avolution (Consolidator)	Golden Hill Packing Pty Ltd (TRI)
I & A Tolson (CNSW)	KV & JM Lehmann (TRI)
Coastal Avocados (CNSW)	The Avocado Grove (WA)
Midcoast Avocados (CNSW)	Green Pear Avocado (WA)
Avocado Industry Council (NZAGA)	Avowest (WA)
G & J Krenske (SQ)	CQ: Less than 3 Packhouse Contributors
Green Nugget Orchards (SQ)	SC: Less than 3 Packhouse Contributors
Balmoral Orchard (SQ)	TNR: Less than 3 Packhouse Contributors
Touchwood Farming (SQ)	

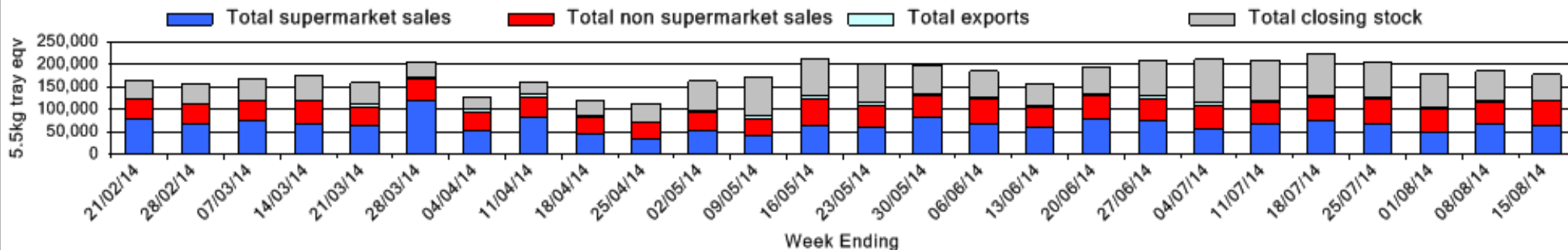
**Week 33 contributors - Wholesalers**

C & S Ponte Produce Pty Ltd (Melbourne)	Murray Bros (Brisbane)
Costa Farms (Adelaide)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Melbourne)	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)
Favco Queensland Pty Ltd (Brisbane)	United Fresh (Adelaide)
Fresh Choice WA Pty Ltd (Perth)	WA Farm Direct (Perth)
Fresh Express Produce Pty Ltd (Perth)	

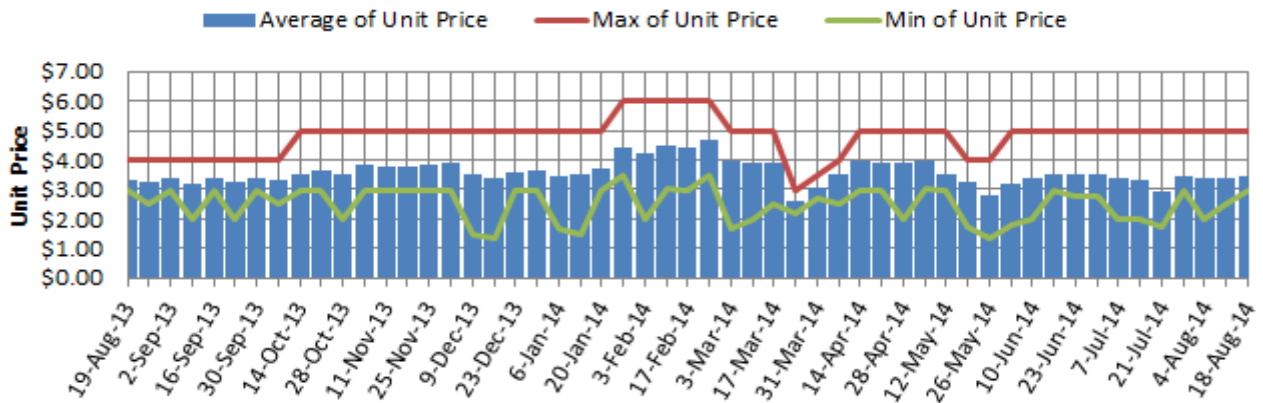
### Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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																		
<b>Total supermarket sales</b>																		
<b>Total non supermarket sales</b>	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total exports</b>																		
<b>Total sales</b>	<b>12,855</b>			<b>12,855</b>	<b>1,134</b>			<b>1,134</b>	<b>2,062</b>						<b>14,917</b>			<b>14,917</b>
<b>Total Stock on Hand</b>																		
QLD																		
<b>Total supermarket sales</b>	17,405		4,931	<b>22,336</b>						120			120	<b>22</b>	17,427		4,931	<b>22,358</b>
<b>Total non supermarket sales</b>	11,515		72	<b>11,587</b>	1,046		8	1,054	<b>1,916</b>						13,417		87	<b>13,503</b>
<b>Total exports</b>	1,534			<b>1,534</b>											1,534			<b>1,534</b>
<b>Total sales</b>	<b>30,454</b>		<b>5,003</b>	<b>35,457</b>	<b>1,046</b>		<b>8</b>	<b>1,054</b>	<b>1,916</b>	<b>120</b>			<b>120</b>	<b>22</b>	<b>32,378</b>		<b>5,017</b>	<b>37,395</b>
<b>Total Stock on Hand</b>	<b>13,701</b>		<b>115</b>	<b>13,816</b>	<b>20</b>		<b>13</b>	<b>33</b>	<b>60</b>						<b>13,737</b>		<b>139</b>	<b>13,876</b>
SA & TAS																		
<b>Total supermarket sales</b>	5,633		4,224	<b>9,857</b>											5,633		4,224	<b>9,857</b>
<b>Total non supermarket sales</b>	3,614			<b>3,614</b>	1,675			1,675	<b>3,045</b>						6,659			<b>6,659</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>9,247</b>		<b>4,224</b>	<b>13,471</b>	<b>1,675</b>			<b>1,675</b>	<b>3,045</b>						<b>12,292</b>		<b>4,224</b>	<b>16,516</b>
<b>Total Stock on Hand</b>	<b>8,258</b>		<b>60</b>	<b>8,318</b>	<b>1,153</b>			<b>1,153</b>	<b>2,096</b>						<b>10,354</b>		<b>60</b>	<b>10,414</b>
VIC																		
<b>Total supermarket sales</b>	12,182		5,341	<b>17,523</b>	192			192	<b>349</b>	660			660	<b>120</b>	12,651		5,341	<b>17,992</b>
<b>Total non supermarket sales</b>	13,014	133	1,370	<b>14,518</b>	4,601		165	4,766	<b>8,665</b>			4	4	<b>1</b>	21,380	133	1,671	<b>23,184</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>25,196</b>	<b>133</b>	<b>6,712</b>	<b>32,041</b>	<b>4,793</b>		<b>165</b>	<b>4,958</b>	<b>9,015</b>	<b>660</b>		<b>4</b>	<b>664</b>	<b>121</b>	<b>34,031</b>	<b>133</b>	<b>7,012</b>	<b>41,176</b>
<b>Total Stock on Hand</b>	<b>14,376</b>		<b>4,719</b>	<b>19,094</b>	<b>2,860</b>		<b>141</b>	<b>3,001</b>	<b>5,456</b>						<b>19,576</b>		<b>4,975</b>	<b>24,550</b>
WA																		
<b>Total supermarket sales</b>	3,278			<b>3,278</b>	51			51	<b>93</b>						3,371			<b>3,371</b>
<b>Total non supermarket sales</b>	5,539			<b>5,539</b>	1,040			1,040	<b>1,891</b>						7,430			<b>7,430</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>8,817</b>			<b>8,817</b>	<b>1,091</b>			<b>1,091</b>	<b>1,984</b>						<b>10,801</b>			<b>10,801</b>
<b>Total Stock on Hand</b>	<b>5,910</b>			<b>5,910</b>	<b>916</b>			<b>916</b>	<b>1,665</b>						<b>7,575</b>			<b>7,575</b>
Total																		
<b>Total supermarket sales</b>	49,689		14,496	<b>64,185</b>	295			295	<b>536</b>	780			780	<b>142</b>	50,367		14,496	<b>64,863</b>
<b>Total non supermarket sales</b>	34,738	133	1,442	<b>36,314</b>	9,444		173	9,617	<b>17,485</b>			4	4	<b>1</b>	51,909	133	1,758	<b>53,800</b>
<b>Total exports</b>	2,142			<b>2,142</b>											2,142			<b>2,142</b>
<b>Total sales</b>	<b>86,569</b>	<b>133</b>	<b>15,938</b>	<b>102,641</b>	<b>9,739</b>		<b>173</b>	<b>9,912</b>	<b>18,022</b>	<b>780</b>		<b>4</b>	<b>784</b>	<b>143</b>	<b>104,418</b>	<b>133</b>	<b>16,254</b>	<b>120,805</b>
<b>Total Stock on Hand</b>	<b>42,492</b>		<b>4,894</b>	<b>47,385</b>	<b>5,621</b>		<b>154</b>	<b>5,775</b>	<b>10,500</b>						<b>52,712</b>		<b>5,174</b>	<b>57,885</b>

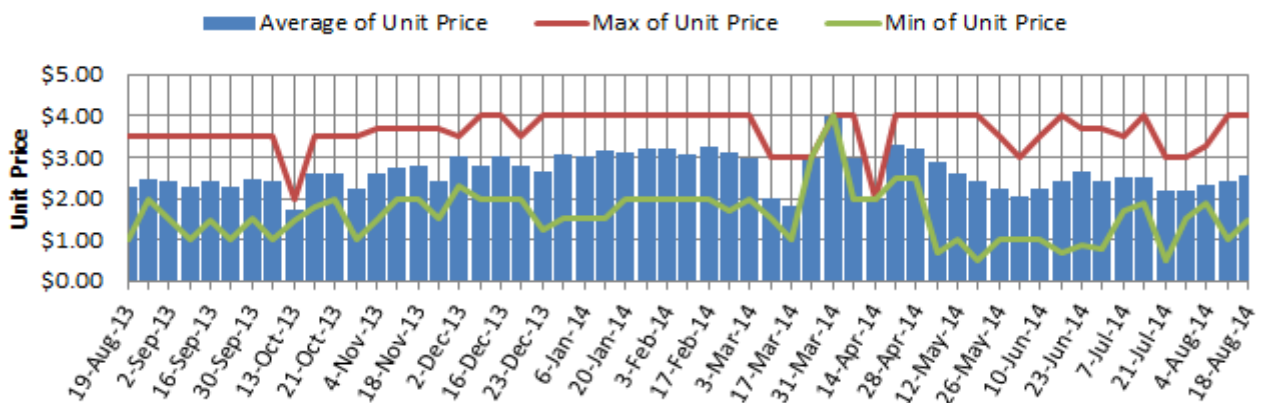
#### Weekly National Sales



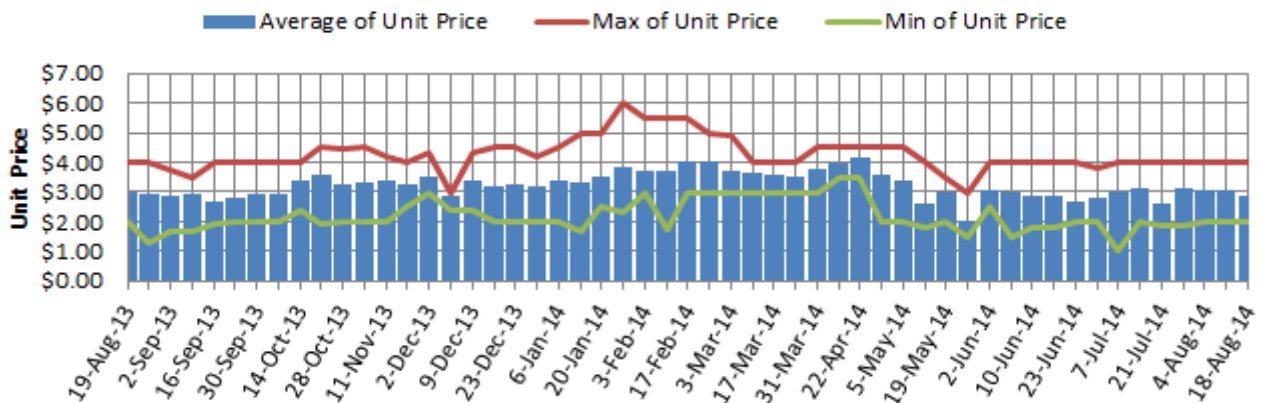
### Hass Avocado Average Retail Prices - Sydney



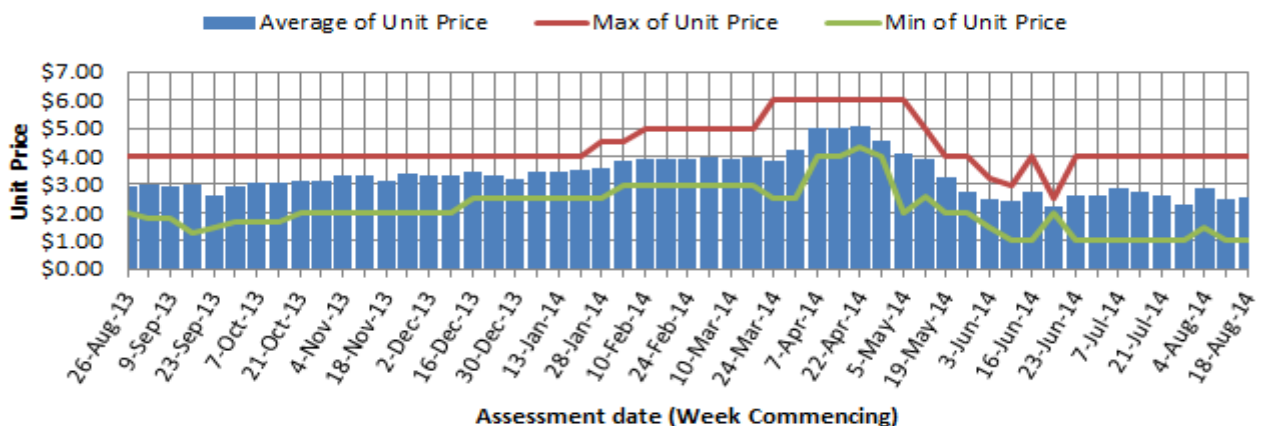
### Hass Avocado Average Retail Prices - Brisbane



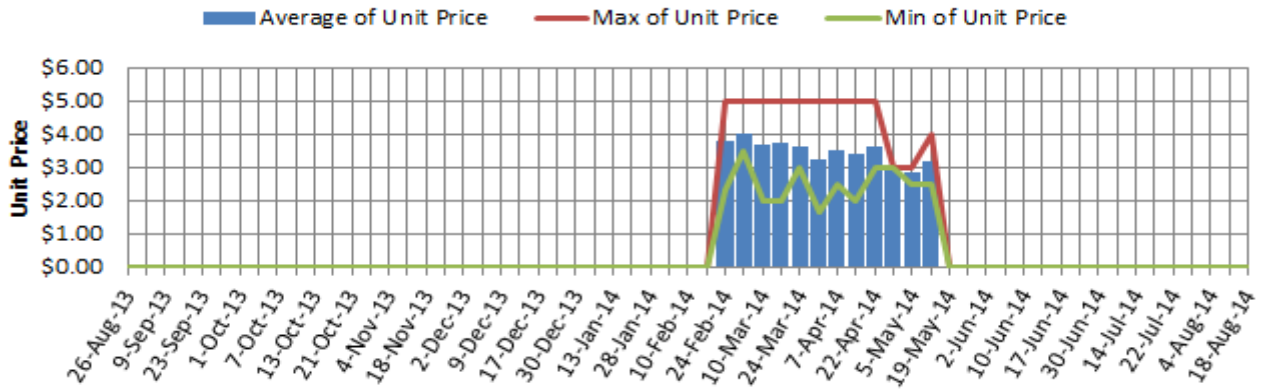
### Hass Avocado Average Retail Prices - Melbourne



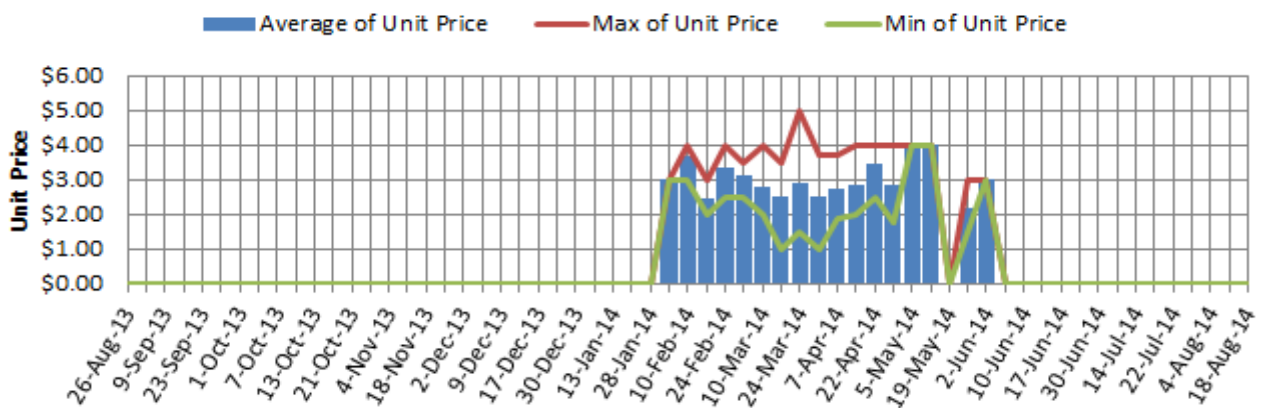
### Hass Avocado Average Retail Prices - Perth



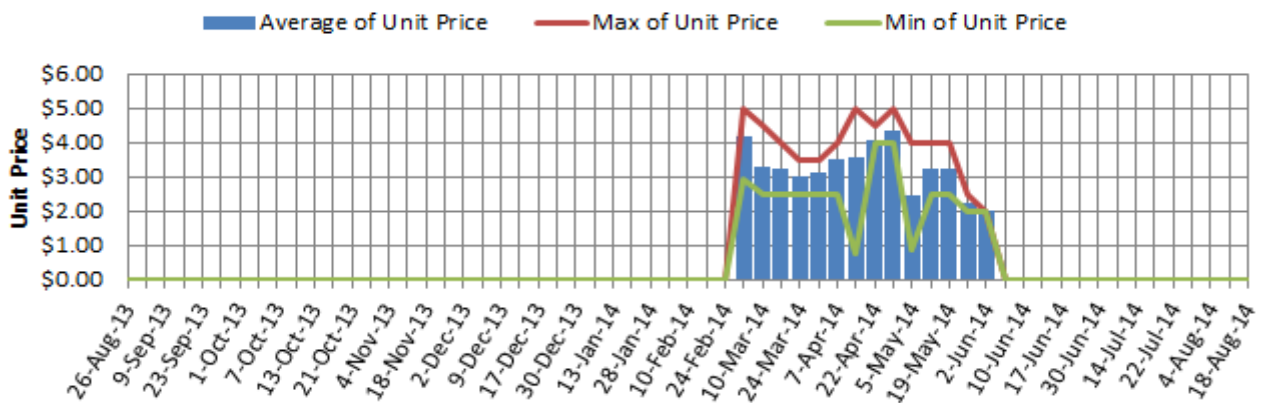
## Shepard Avocado Average Retail Prices - Sydney



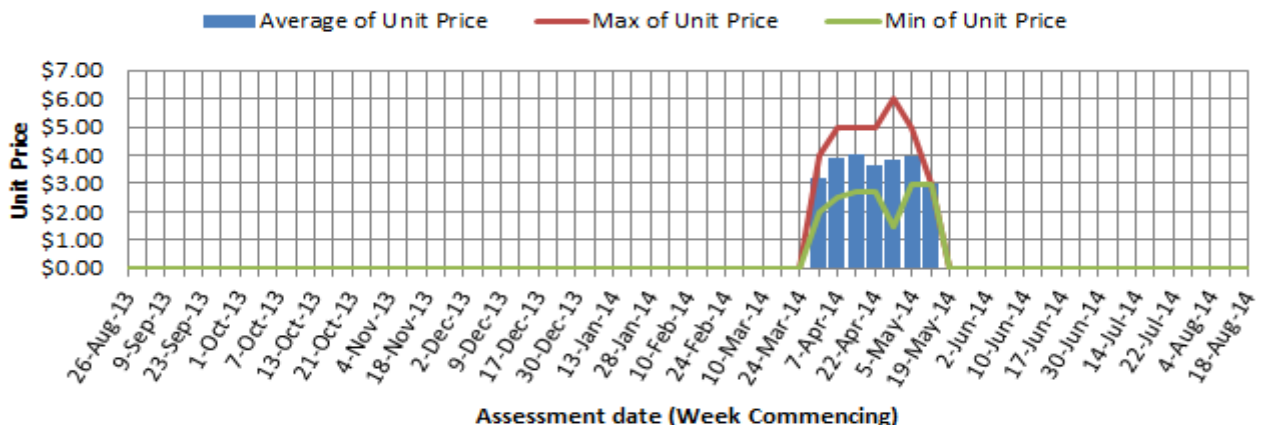
## Shepard Avocado Average Retail Prices - Brisbane



## Shepard Avocado Average Retail Prices - Melbourne



## Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 18th August 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>					
Woolworths	Hass	290	2.98	No	Aus
Woolworths	Hass	270	2.98	No	Aus
Coles	Hass	240	2.98	No	Aus
IGA	Hass	220	2.98	No	NZ
Woolworths	Hass	270	2.98	No	Aus
Coles	Hass	280	2.98	No	Aus
I	Hass	270	2.99	No	Aus
I	Hass	270	2.99	No	Aus
Foodworks	Hass	300	3.49	No	Aus
I	Hass	270	3.49	No	Aus
IGA	Hass	280	3.49	No	Aus
I	Hass	290	3.99	No	Aus
I	Hass	320	3.99	No	Aus
I	Hass	330	3.99	No	Aus
I	Hass	330	4.99	No	Aus
<b>BRISBANE</b>					
I	Hass	135	1.49	No	Aus
I	Hass	135	1.49	No	Aus
Woolworths	Hass	185	1.98	No	Aus
Coles	Hass	200	1.98	No	Aus
Coles	Hass	200	1.98	No	Aus
Coles	Hass	200	1.98	No	Aus
I	Hass	200	1.99	No	Aus
I	Hass	220	2.50	No	Aus
IGA	Hass	180	2.68	No	Aus
Woolworths	Hass	205	2.98	No	Aus
Woolworths	Hass	260	2.98	No	Aus
I	Hass	280	3.00	Store	Aus
I	Hass	240	3.29	No	Aus
IGA	Hass	230	3.99	No	Aus
I	Hass	305	3.99	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>MELBOURNE</b>					
I	Hass	230	1.99	No	Aus
I	Hass	180	1.99	No	Aus
I	Hass	240	2.49	No	NS
I	Hass	240	2.69	No	NS
I	Hass	260	2.90	No	Aus
Woolworths	Hass	260	2.98	Store	Aus
Woolworths	Hass	220	2.98	No	Aus
Coles	Hass	230	2.98	No	Aus
Coles	Hass	230	2.98	No	Aus
Coles	Hass	215	2.98	No	Aus
Coles	Reed	420	2.98	No	Aus
Woolworths	Hass	220	2.98	No	Aus
IGA	Hass	230	2.99	No	Aus
IS	Hass	270	2.99	No	Aus
I	Hass	275	3.19	No	Aus
I	Hass	285	3.19	No	Aus
I	Hass	370	3.98	No	Aus
<b>PERTH</b>					
IGA	Hass	145	0.99	No	Aus
I	Hass	190	1.98	No	Aus
IGA	Hass	190	1.99	Cat	Aus
IGA	Hass	210	1.99	Cat	Aus
IGA	Hass	215	1.99	Cat	Aus
Coles	Hass	190	2.48	No	Aus
Coles	Hass	170	2.48	No	Aus
Coles	Hass	200	2.48	No	Aus
I	Hass	225	2.79	No	Aus
Woolworths	Hass	190	2.98	No	Aus
Woolworths	Hass	200	2.98	No	Aus
Woolworths	Hass	195	2.98	No	Aus
I	Hass	270	2.99	No	Aus
I	Hass	250	2.99	No	Aus
I	Hass	265	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