



# INFOCADO WEEKLY REPORT: 18th — 24th August 2012 (Wk 34)



## Comments

- Weather is finally starting to warm up which should be good for sales.
- In week 34, 2011 approximately 200,000 trays were dispatched. In week 34, 2012 approximately 180,000 trays were dispatched. The dispatches for weeks 35 to 38 in 2011 are compared to the forecasts for respective weeks in 2012 below

week no.	Dispatches 2011	Forecasts 2012
35	~190K trays	~125K trays
36	~200K trays	~115K trays

week no.	Dispatches 2011	Forecasts 2012
37	~225K trays	~115K trays
38	~225K trays	~100K trays

- Average retail prices across all states has started to drop.
- During the second half of 2011 across all states one of the 2 major supermarkets advertised 35 avocado catalogue specials. So far since 1 July 2012 that same store has only advertised 4 avocado catalogue specials. The other major supermarket advertised 26 avocado catalogue specials across all states during the second half of 2011 and so far since 1 July 2012 has advertised 3 avocado catalogue specials.

## 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. All packers are due to review their seasonal forecast next month in preparation for the October Quarterly Report.

## Upcoming Holidays

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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[Click here to for a refresher on how to contribute to Infocado](#)

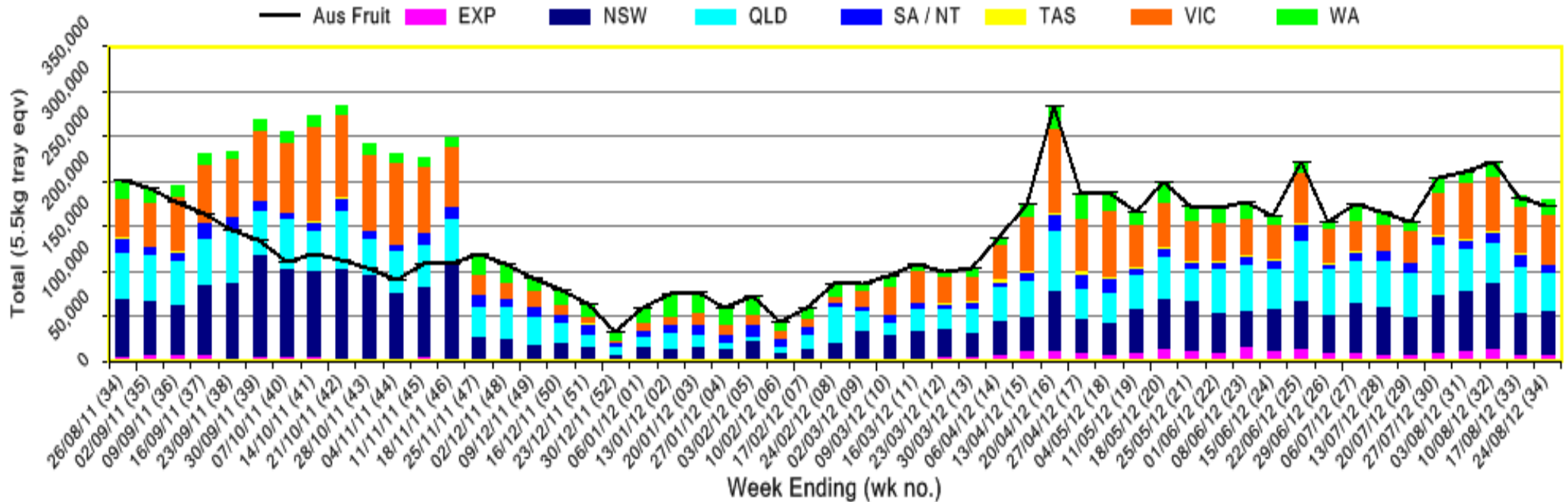
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[Click here to download avocado supply chain education materials](#)

**Industry Dispatches By Destination State and Count Size : 18th August - 24th August 2012 (Wk 34)**

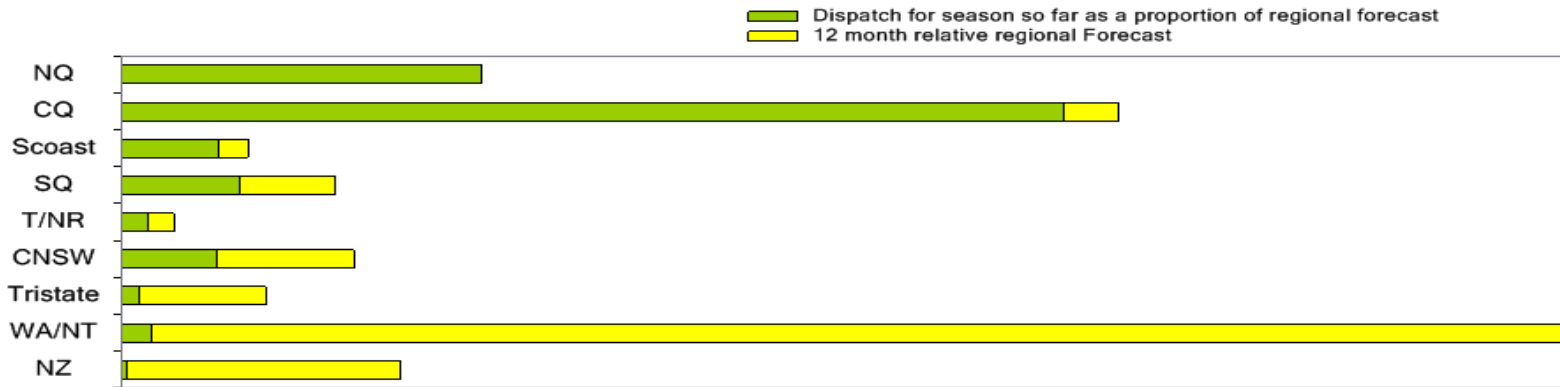
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP								3,200	2,540	5,740	672	600			7,071
NSW	124	1,181	2,864	16,962	1,623	6,517	6,168	1,343	547	37,329	6,250	2,880		990	49,397
QLD	15	553	1,824	4,661	822	5,273	9,423	5,130	966	28,667	6,334	1,280	3,000		40,961
SA / NT	13	60	2,197	2,612		1,770	155	1,720	2	8,529	240	180			8,998
TAS								640		640	464				1,484
VIC	181	2,886	6,877	12,347	240	6,995	6,351	1,903	1,088	38,868	8,197	2,052			54,145
WA		173	531	2,459		3,585	4,838	1,995	144	13,725	2,041				17,436
<b>Total</b>	<b>333</b>	<b>4,853</b>	<b>14,293</b>	<b>39,041</b>	<b>2,685</b>	<b>24,140</b>	<b>27,575</b>	<b>15,291</b>	<b>5,287</b>	<b>133,498</b>	<b>24,198</b>	<b>6,992</b>	<b>3,000</b>	<b>990</b>	<b>179,490</b>

**Throughput Australian & NZ avocados by destination state**  
 Throughput 1st January 2012 to date = 4,882,469 5.5kg tray eqv

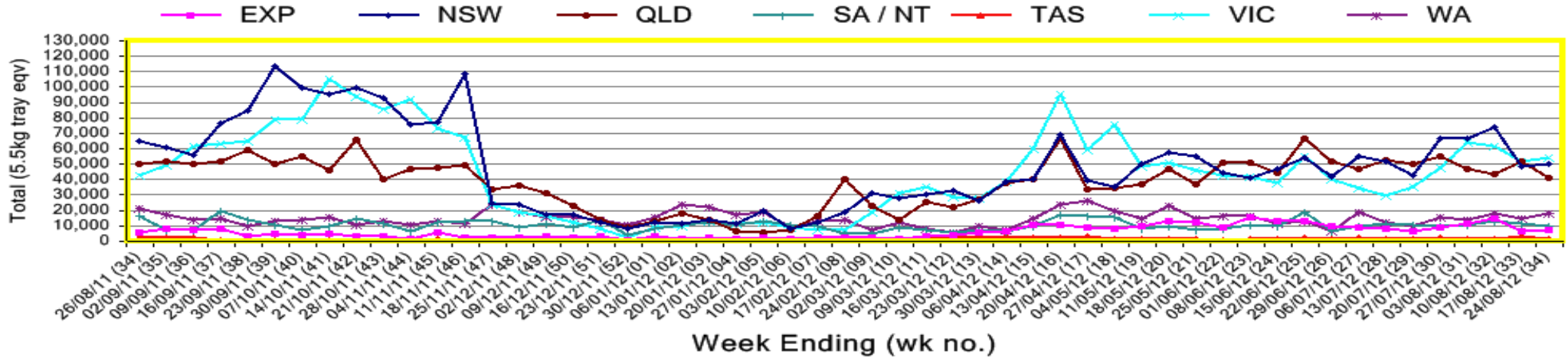




Percentage dispatched by region (Based on seasonal forecast - 2012)



Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2012 to date = 4,882,469 5.5kg tray eqv



**Week 34 contributors - Packhouses**

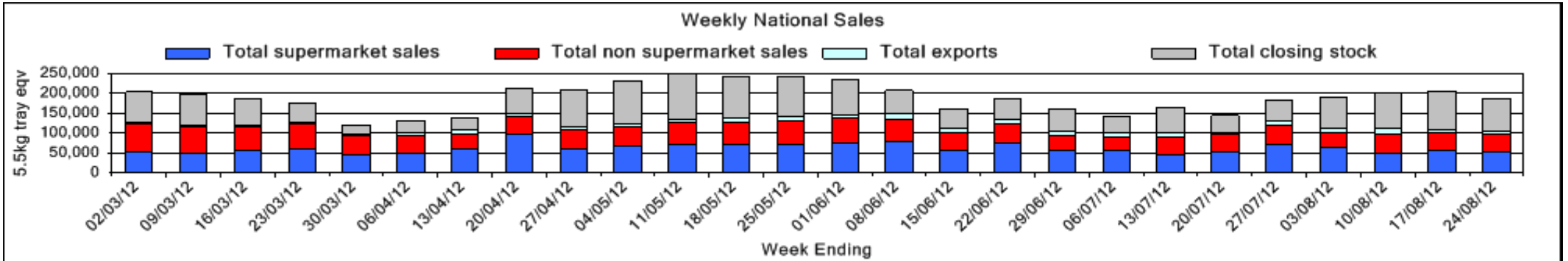
- |                                  |                             |
|----------------------------------|-----------------------------|
| Avocado Industry Council (NZAGA) | Natures Fruit Company       |
| Avowest                          | One Harvest                 |
| Balmoral Orchard                 | Perseverance Farming Co     |
| Coastal Avocados                 | Simpson Farms Pty Ltd       |
| Delroy Orchards                  | Sunfresh                    |
| Donovan Family Investment Trust  | Sunnyspot Packhouse Pty Ltd |
| Green Nugget Orchards            | The Avocado Grove           |
| Green Pear Avocado               | Touchwood Farming           |
| I & A Tolson                     | Wodonga Park Fruit and Nuts |
| Midcoast Avocados                |                             |

**Week 34 contributors - Wholesalers**

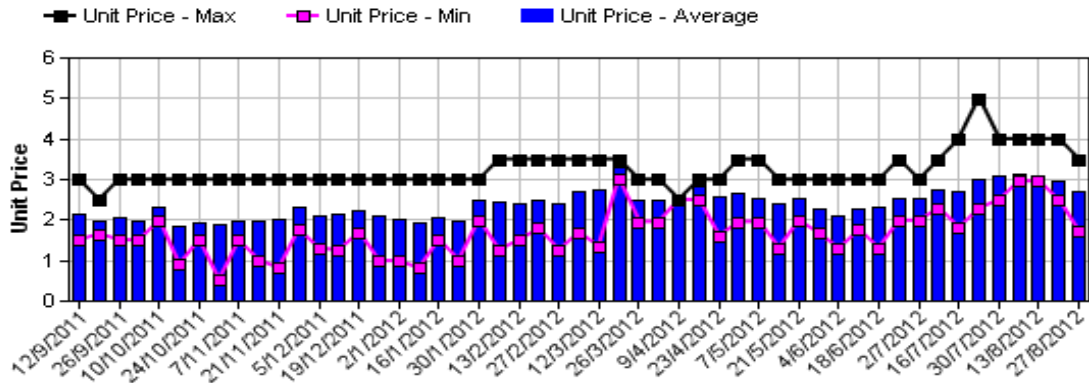
- |                                 |   |
|---------------------------------|---|
| Allcrops Pty Ltd (Sydney)       | Fresh Express Produce Pty Ltd (Perth)     |
| Costa Farms (Adelaide)          | Kelly's (Melbourne)                       |
| Costa Farms (Brisbane)          | Murray Bros (Brisbane)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

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

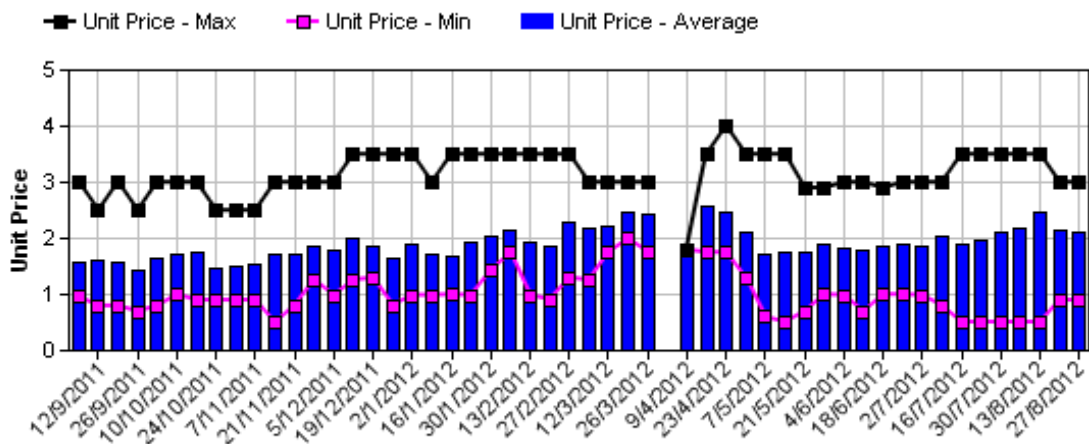
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
<b>Total supermarket sales</b>	12,053			12,053						144			144	26	12,079			12,079
<b>Total non supermarket sales</b>	6,865			6,865	3,325			3,325	6,045						12,910			12,910
<b>Total exports</b>																		
<b>Total sales</b>	18,918			18,918	3,325			3,325	6,045	144			144	26	24,989			24,989
<b>Total Stock on Hand</b>	3,040			3,040	1,139			1,139	2,071						5,111			5,111
QLD																		
<b>Total supermarket sales</b>	20,402		160	20,562	419			419	762	180			180	33	21,197		160	21,357
<b>Total non supermarket sales</b>	13,088		504	13,592	708			708	1,287						14,375		504	14,879
<b>Total exports</b>	5,740			5,740	672			672	1,222	600			600	109	7,071			7,071
<b>Total sales</b>	39,230		664	39,894	1,799			1,799	3,271	780			780	142	42,643		664	43,307
<b>Total Stock on Hand</b>	28,170		230	28,400	255		32	287	522						28,634		288	28,922
SA & TAS																		
<b>Total supermarket sales</b>	7,984			7,984			156	156	284	180			180	33	8,017		284	8,300
<b>Total non supermarket sales</b>	3,137		463	3,600	578		107	685	1,245						4,188		658	4,845
<b>Total exports</b>																		
<b>Total sales</b>	11,121		463	11,584	578		263	841	1,529	180			180	33	12,205		941	13,146
<b>Total Stock on Hand</b>	12,749		255	13,004	2,403		499	2,902	5,276						17,118		1,162	18,280
VIC																		
<b>Total supermarket sales</b>	11,782			11,782											11,782			11,782
<b>Total non supermarket sales</b>	3,645		555	4,200	387		170	557	1,013						4,349		864	5,213
<b>Total exports</b>																		
<b>Total sales</b>	15,427		555	15,982	387		170	557	1,013						16,131		864	16,995
<b>Total Stock on Hand</b>	14,441		547	14,988	4,270		199	4,469	8,125						22,204		909	23,113
WA																		
<b>Total supermarket sales</b>	812			812											812			812
<b>Total non supermarket sales</b>	2,957			2,957	1,550		61	1,611	2,929						5,775		111	5,886
<b>Total exports</b>																		
<b>Total sales</b>	3,769			3,769	1,550		61	1,611	2,929						6,587		111	6,698
<b>Total Stock on Hand</b>	6,300		33	6,333	794			794	1,444						7,744		33	7,777
Total																		
<b>Total supermarket sales</b>	53,033		160	53,193	419		156	575	1,045	504			504	92	53,886		444	54,330
<b>Total non supermarket sales</b>	29,692		1,522	31,214	6,548		338	6,886	12,520						41,597		2,137	43,734
<b>Total exports</b>	5,740			5,740	672			672	1,222	600			600	109	7,071			7,071
<b>Total sales</b>	88,465		1,682	90,147	7,639		494	8,133	14,787	1,104			1,104	201	102,555		2,580	105,135
<b>Total Stock on Hand</b>	64,700		1,065	65,765	8,861		730	9,591	17,438						80,811		2,393	83,203



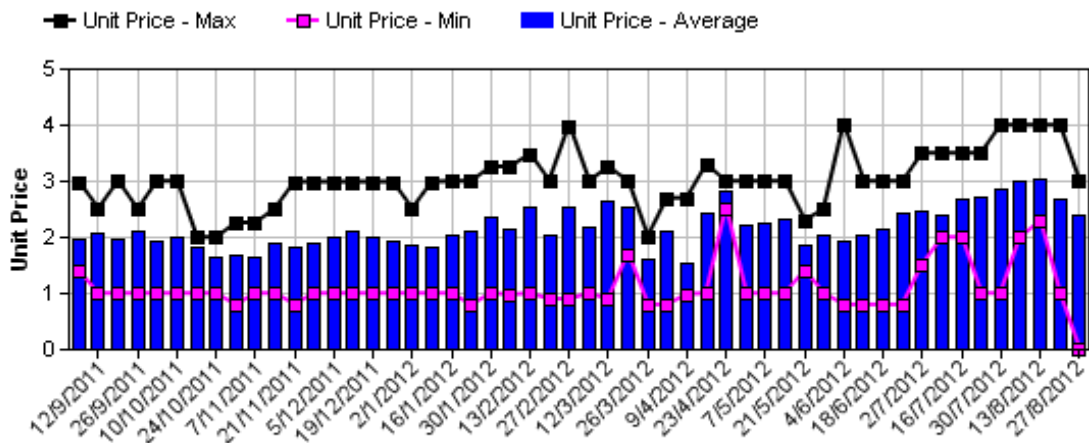
### Hass Avocado Average Retail Prices - Sydney



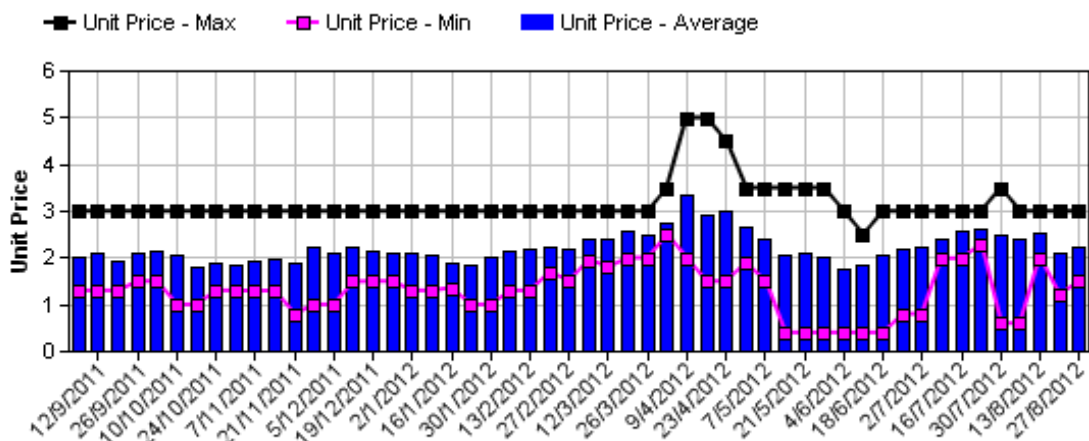
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

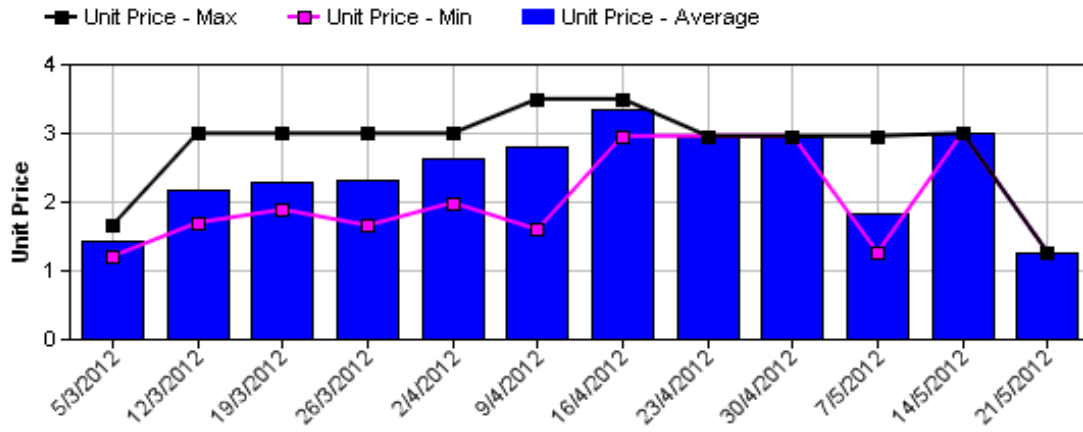


### Hass Avocado Average Retail Prices - Perth

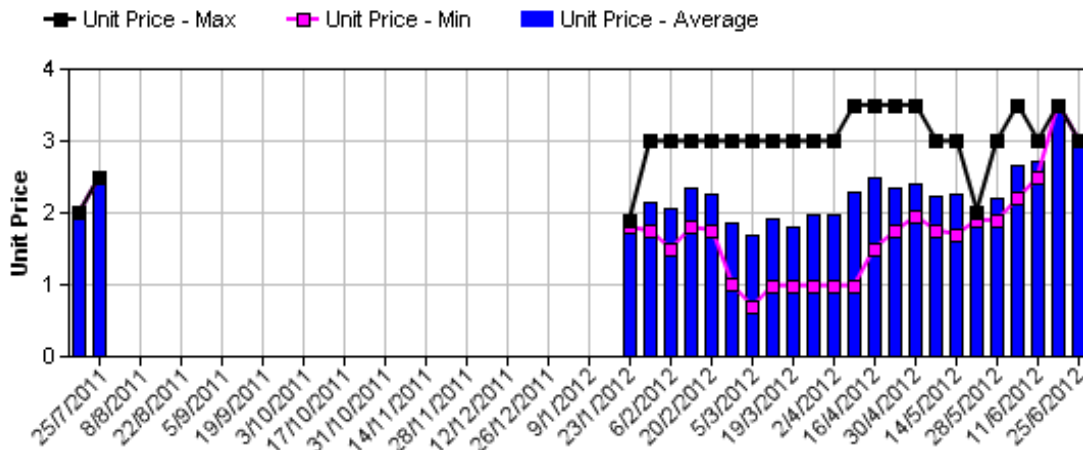


Assessment Date [Week Commencing]

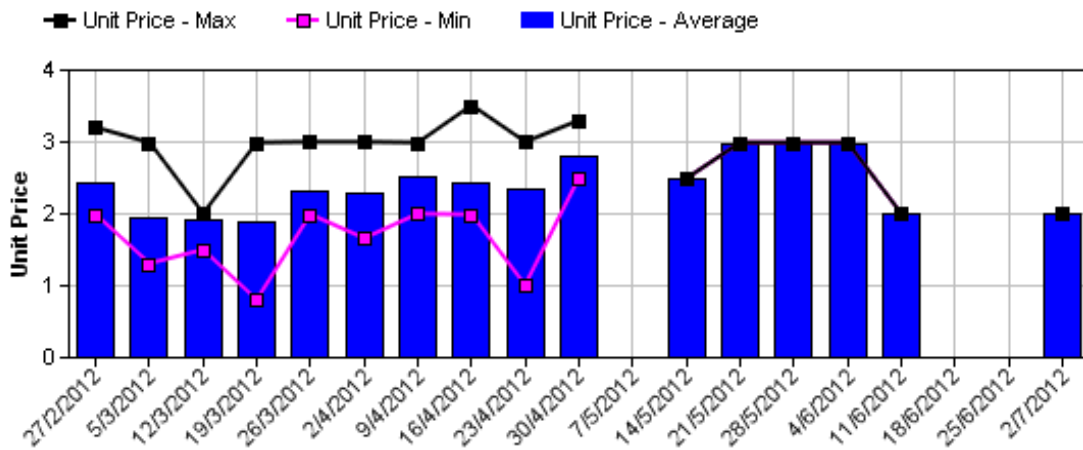
Shepard Avocado Average Retail Prices - Sydney



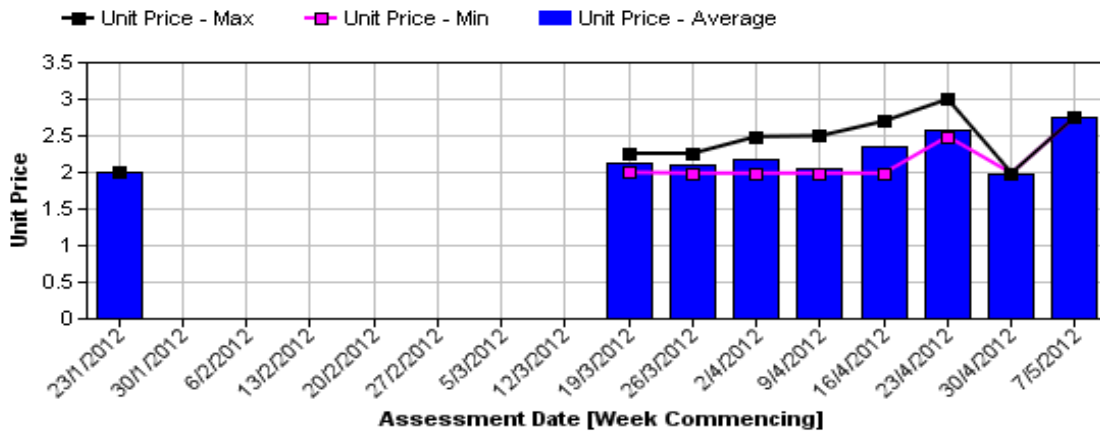
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



## Retail Prices by City, Store and Variety - 27th August 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>					
Foodworks	Hass	170	1.49	Store	Aus
IC	Hass	190	1.66	Store	Aus
IC	Hass	190	1.66	Store	Aus
IC	Hass	220	1.7	Store	Aus
Coles	Hass	230	1.7	Cat	Aus
Coles	Hass	250	1.7	Cat	Aus
Coles	Hass	240	1.7	Cat	Aus
IGA	Hass	200	1.95	No	Aus
I	Hass	200	1.99	No	Aus
I	Reed	440	1.99	No	Aus
IC	Reed	390	2	Store	Aus
Woolworths	Hass	265	2.38	Store	Aus
I	Hass	225	2.49	No	Aus
I	Reed	430	2.49	No	Aus
I	Reed	420	2.49	No	Aus
IGA	Hass	235	2.49	No	Aus
I	Reed	410	2.49	No	Aus
Woolworths	Hass	230	2.68	No	Aus
IGA	Hass	270	2.95	No	Aus
Coles	Hass	270	2.98	No	Aus
Coles	Hass	250	2.98	No	Aus
Woolworths	Hass	270	2.98	No	Aus
IC	Hass	290	2.99	No	Aus
I	Hass	260	2.99	No	Aus
IC	Hass	285	2.99	No	Aus
I	Hass	270	2.99	No	Aus
Foodworks	Hass	260	2.99	No	Aus
I	Hass	275	2.99	No	Aus
I	Hass	190	2.99	No	Aus
IC	Hass	300	2.99	No	Aus
I	Hass	300	3.49	No	Aus
<b>BRISBANE</b>					
I	Hass	135	0.89	Store	Aus
Woolworths	Hass	200	1.5	No	Aus
IGA	Hass	195	1.59	Store	Aus
IGA	Hass	200	1.69	Cat	Aus
IGA	Hass	220	1.79	Store	Aus
Coles	Hass	225	1.98	Store	Aus
Coles	Hass	220	1.98	Store	Aus
Coles	Hass	220	1.98	Store	Aus
I	Hass	255	1.98	Store	Aus
Woolworths	Hass	290	2.28	No	Aus
I	Reed	460	2.5	Store	Aus
I	Hass	295	2.5	Store	Aus
I	Hass	280	2.5	Store	Aus
Woolworths	Hass	220	2.97	No	Aus
Coles	Hass	175	2.98	No	Aus
I	Hass	240	2.99	No	Aus
I	Hass	330	2.99	Store	Aus
IC	Hass	230	2.99	No	Aus
I	Hass	265	2.99	Store	Aus
I	Hass	265	2.99	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>MELBOURNE</b>					
I	Hass	305	0	No	NS
I	Hass	230	0.99	No	NS
I	Hass	241	1.99	No	Aus
I	Hass	265	2.29	No	NS
I	Hass	250	2.48	Cat	Mixed
Coles	Hass	245	2.48	Cat	Aus
I	Hass	285	2.49	No	NS
I	Hass	245	2.49	No	NS
I	Hass	290	2.5	No	NS
Safeway	Hass	280	2.98	No	Aus
Safeway	Hass	295	2.98	No	Aus
IC	Hass	290	2.98	No	Aus
Safeway	Hass	290	2.98	No	Aus
IGA	Hass	255	2.99	No	Aus
I	Hass	240	2.99	No	Aus
I	Hass	284	2.99	No	Aus
I	Hass	270	2.99	No	Aus
<b>PERTH</b>					
I	Hass	160	0.99	No	Aus
IS	Hass	180	1.5	Store	Aus
I	Hass	190	1.79	Store	Aus
IGA	Hass	305	1.79	Store	Aus
IGA	Hass	210	1.79	Store	Aus
Woolworths	Hass	210	1.98	No	Aus
Woolworths	Hass	215	1.98	Store	Aus
Coles	Hass	210	1.98	No	Aus
Coles	Hass	265	1.98	No	Aus
Coles	Hass	210	1.98	No	Aus
Woolworths	Hass	210	1.98	No	Aus
I	Hass	220	2.49	No	Aus
IGA	Hass	220	2.49	No	Aus
I	Hass	240	2.69	No	Aus
IS	Hass	265	2.89	No	Aus
IGA	Hass	240	2.99	No	Aus
I	Hass	250	2.99	No	Aus
I	Hass	250	2.99	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