



INFOCADO WEEKLY REPORT: 16th —22nd August 2014 (Wk 34)



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Comments

- The average retail price per Hass avocado continued to remain steady, Brisbane has continued to increase in average value (refer page 6 & 7). The weekly national sales have also remained steady with closing stock slightly reduced from the past weeks (refer page 5).
- The four weekly forecast has began to trend upwards as the industry moves into the high production phase of 2014. AAL would like to thank all contributing packhouses in updating their four weekly forecast (refer page 3).
- The steady volume of avocados continue to be dispatched from NZ with volumes similar to past weeks (refer page 2).

What you need to be aware of for next month

Growers who are about to begin their harvest are reminded to test fruit maturity and ensure that dry matter levels are at least 23%. Click on the tab on the left hand side of this page for further information on testing procedures. Hass dry matter levels below 23% are known to lead to consumer dissatisfaction and impact on repeat purchase.

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.

For a full brief read the latest Guacamole edition.

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:

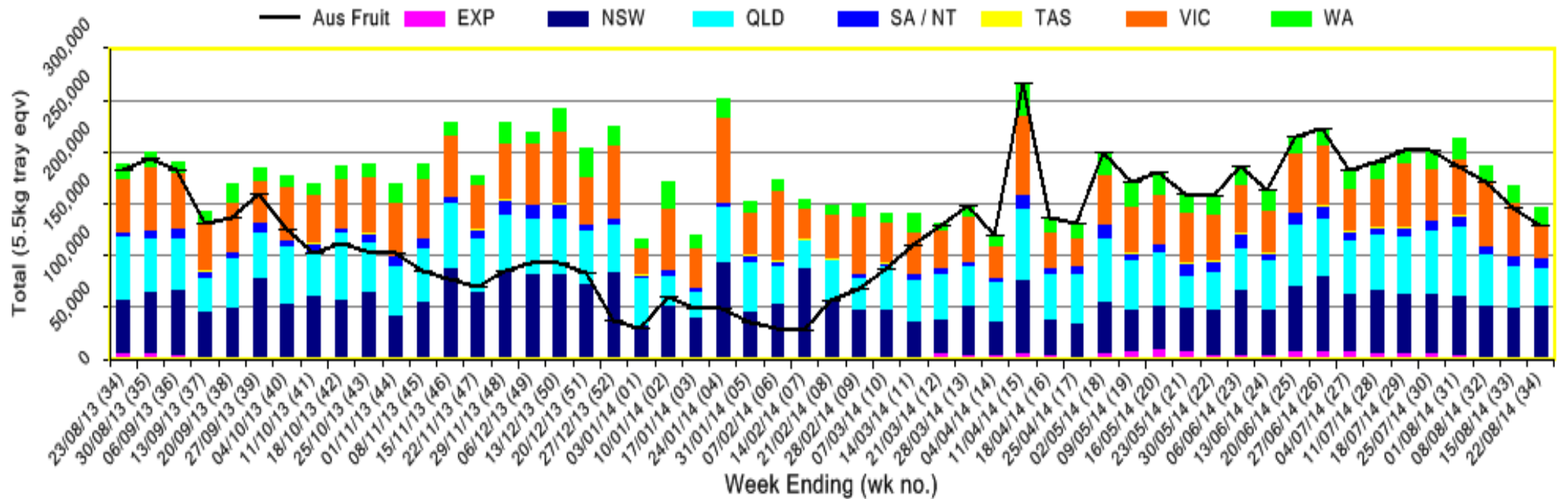
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 16th August - 22nd August 2014 (Wk 34)

Dest. State	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				
EXP									141	609	750					750
NSW	87	854	3,083	11,745	175	12,601	7,506	3,696	2,669	42,416	4,783	619	1,630	51,521		
QLD	14	144	1,184	3,183		4,451	8,805	7,396	2,144	27,321	4,461	84	3,680	36,116		
SA / NT		36	1,620	1,138		746	305	1,865	83	5,793	1,321	360		8,260		
TAS							476			476				476		
VIC	22	1,114	2,365	5,391	44	7,432	9,588	2,544	1,646	30,146	1,459	480	800	33,031		
WA	28	235	512	2,467		4,057	3,471	4,299	132	15,201	993		1,020	17,191		
Total	151	2,383	8,764	23,924	219	29,287	30,151	19,941	7,283	122,103	13,017	1,543	7,130	147,347		

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2014 to date = 5,787,470 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 34 - 38)

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

Week 34 - begin 16/08/2014

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

Week 35 - begin 23/08/2014

Gem	600	20			636
Hass	147,379	9,760	3,500	3,000	166,305
Lamb Hass	500	30			555
Week Total	148,479	9,810	3,500	3,000	167,496

Week 36 - begin 30/08/2014

Hass	149,452	7,535	3,500	1,000	163,970
Lamb Hass	500	30			555
Week Total	149,952	7,565	3,500	1,000	164,525

Week 37 - begin 06/09/2014

Hass	155,969	6,100	3,500	1,000	167,878
Lamb Hass	500	30			555
Week Total	156,469	6,130	3,500	1,000	168,432

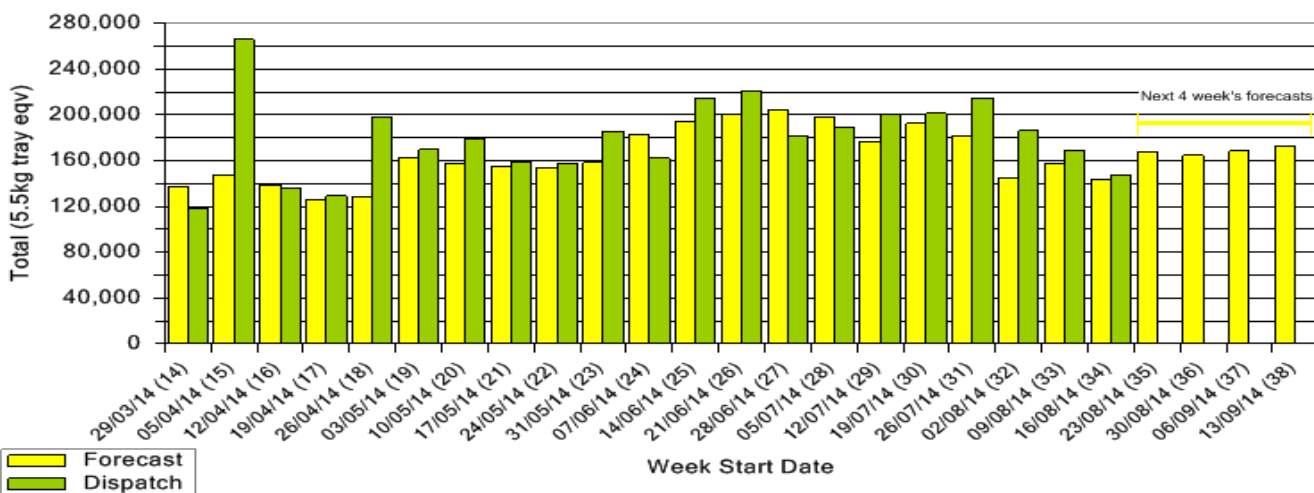
Week 38 - begin 13/09/2014

Hass	164,585	4,000	3,500	1,000	172,676
Week Total	164,585	4,000	3,500	1,000	172,676

Dispatch Data (Week 34 - begin 16/08/2014)

Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Hass	121,559	12,967	1,543	7,130	146,712
Lamb Hass	473	9			489
Reed	71	41			146
Total	122,103	13,017	1,543	7,130	147,347

Dispatch vs weekly forecast - all varieties and all packs
(29th March 2014 to 19th September 2014)

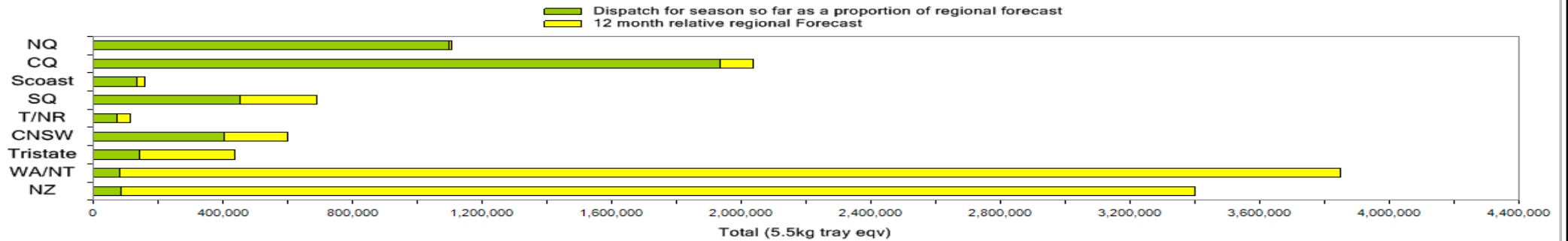


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

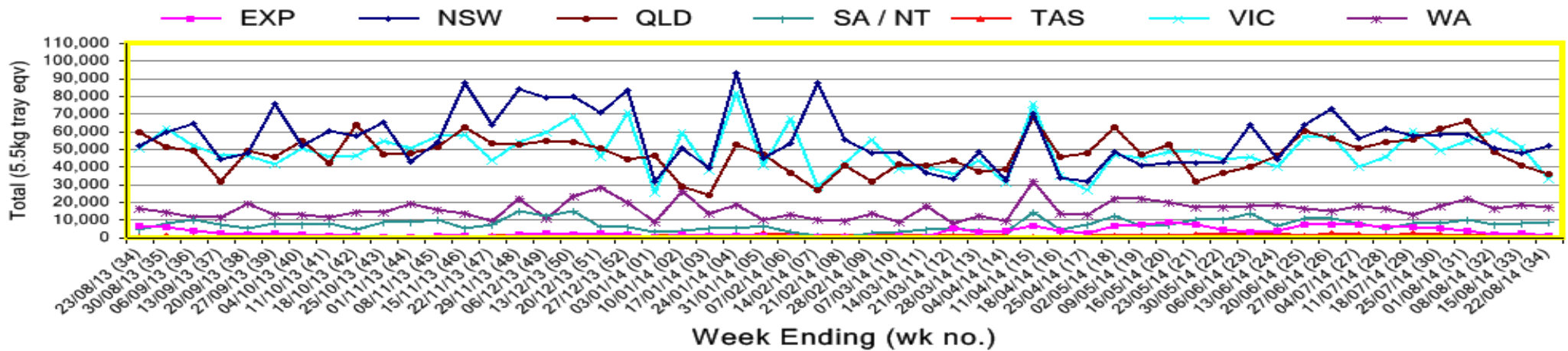
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347
Australia (from Infocado)	88,204									88,204
USA¹										
Japan¹										
Other Asia¹										
Total	88,204									88,204

¹ 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 = 5,787,470 5.5kg tray eqv



Week 34 contributors - Packhouses

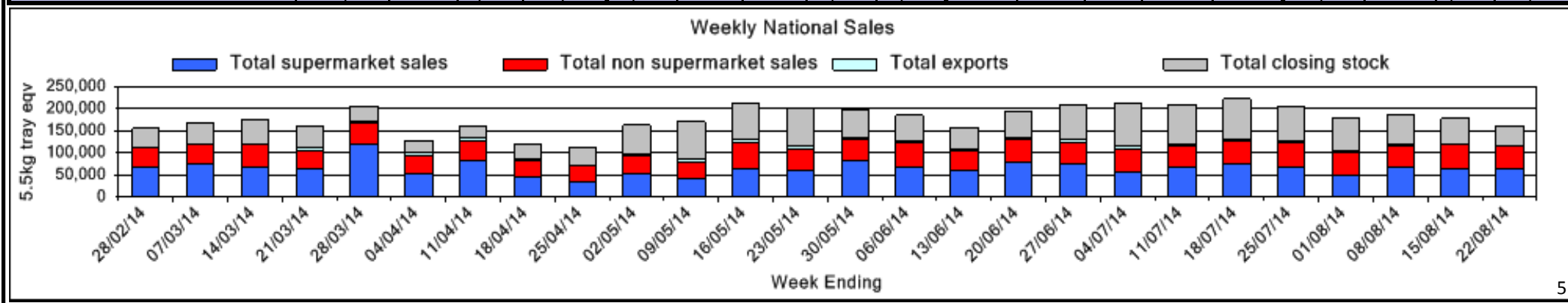
Natures Fruit Company (Consolidator)	Googa Farms (SQ)
One Harvest (Consolidator)	Marrbiz Pty Ltd (TRI)
Sunfresh (Consolidator)	Golden Hill Packing Pty Ltd (TRI)
The Avolution (Consolidator)	Bonyaricall Vineyards (TRI)
I & A Tolson (CNSW)	KV & JM Lehmann (TRI)
Midcoast Avocados (CNSW)	The Avocado Grove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

Week 34 contributors - Wholesalers

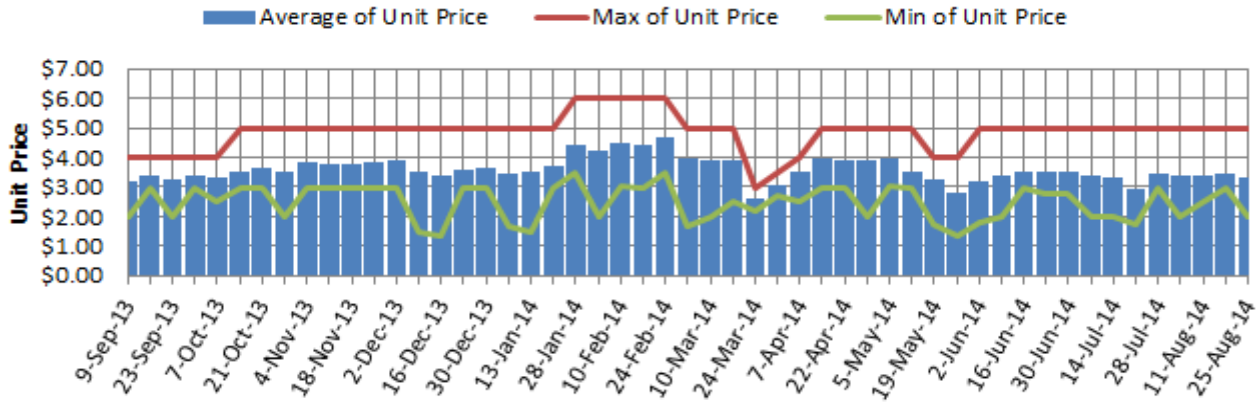
Costa Farms (Adelaide)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Melbourne)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Dykes Bros (Melbourne)	The La Manna Group (Adelaide)
Etherington (Perth)	The La Manna Group (Brisbane)
Exotic Fruit Traders (Sydney)	The La Manna Group (Melbourne)
Favco Queensland Pty Ltd (Brisbane)	United Fresh (Adelaide)
Fresh Choice WA Pty Ltd (Perth)	WA Farm Direct (Perth)
Murray Bros (Brisbane)	

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

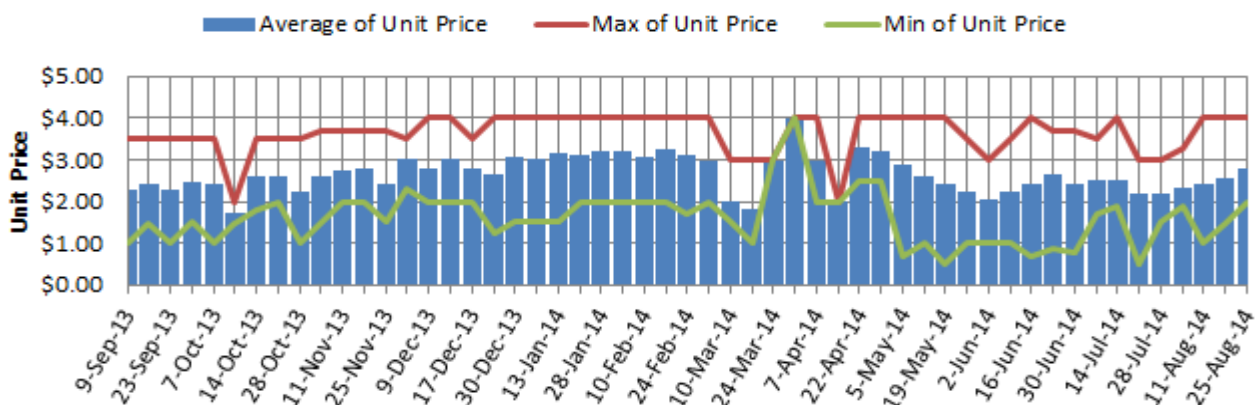
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	21,449			21,449	1,829			1,829	3,325	240			240	44	24,818			24,818
Total Stock on Hand																		
QLD																		
Total supermarket sales	10,748			10,748						84			84	15	10,763			10,763
Total non supermarket sales	13,516		115	13,631	1,168		13	1,181	2,147						15,640		139	15,778
Total exports	750			750											750			750
Total sales	25,014		115	25,129	1,168		13	1,181	2,147	84			84	15	27,153		139	27,292
Total Stock on Hand	13,085			13,085	18			18	33						13,118			13,118
SA & TAS																		
Total supermarket sales	9,517		60	9,577						360			360	65	9,582		60	9,642
Total non supermarket sales	3,340			3,340	1,237			1,237	2,249						5,589			5,589
Total exports																		
Total sales	12,857		60	12,917	1,237			1,237	2,249	360			360	65	15,172		60	15,232
Total Stock on Hand	11,552		27	11,579	648			648	1,178						12,730		27	12,757
VIC																		
Total supermarket sales	18,697			18,697	112			112	204	480			480	87	18,988			18,988
Total non supermarket sales	13,897		2,251	16,148	1,734		141	1,875	3,409						17,050		2,507	19,557
Total exports																		
Total sales	32,594		2,251	34,845	1,846		141	1,987	3,613	480			480	87	36,038		2,507	38,545
Total Stock on Hand	10,434		1,795	12,229	1,475			1,475	2,682	10			10	2	13,118		1,795	14,913
WA																		
Total supermarket sales	4,247			4,247	257			257	467						4,714			4,714
Total non supermarket sales	3,528			3,528	826			826	1,502						5,030			5,030
Total exports																		
Total sales	7,775			7,775	1,083			1,083	1,969						9,744			9,744
Total Stock on Hand	3,221			3,221	120			120	218						3,439			3,439
Total																		
Total supermarket sales	63,155		60	63,215	1,070			1,070	1,945	1,164			1,164	212	65,312		60	65,372
Total non supermarket sales	35,784		2,366	38,150	6,093		154	6,247	11,358						46,863		2,646	49,508
Total exports	750			750											750			750
Total sales	99,689		2,426	102,115	7,163		154	7,317	13,304	1,164			1,164	212	112,925		2,706	115,630
Total Stock on Hand	38,960		1,822	40,782	2,837			2,837	5,158	10			10	2	44,120		1,822	45,942



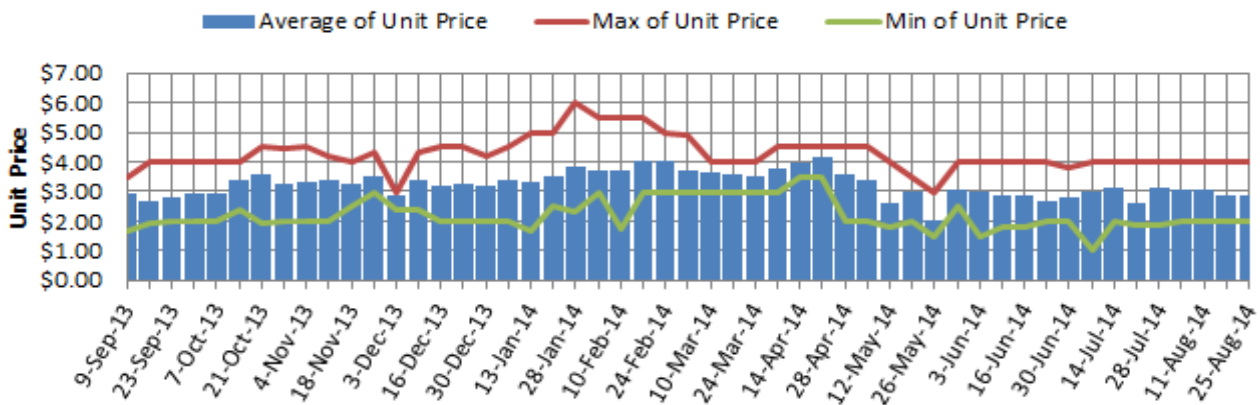
Hass Avocado Average Retail Prices - Sydney



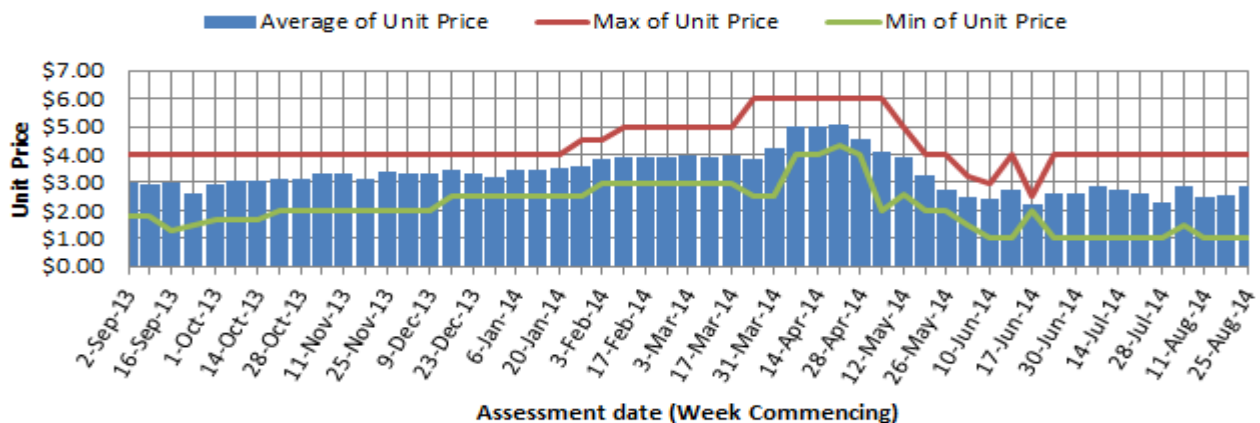
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

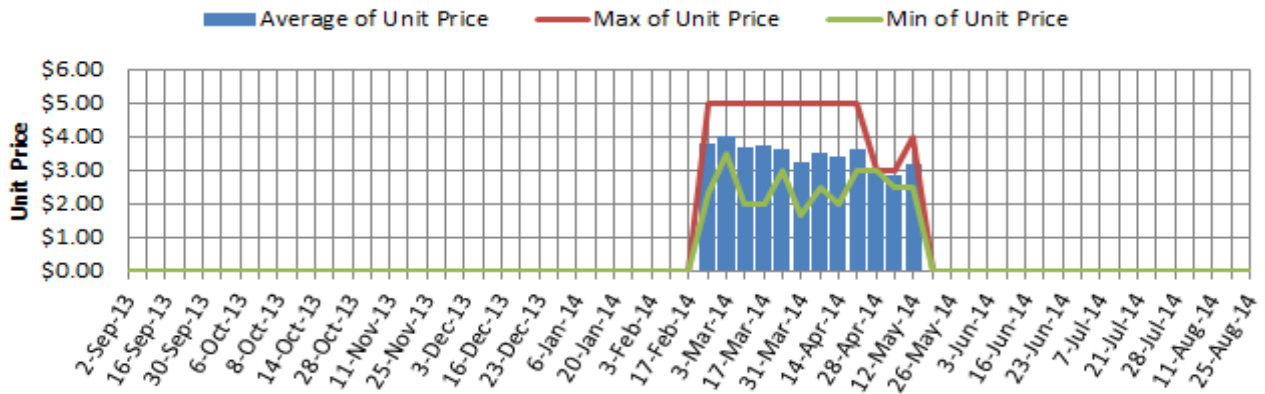


Hass Avocado Average Retail Prices - Perth

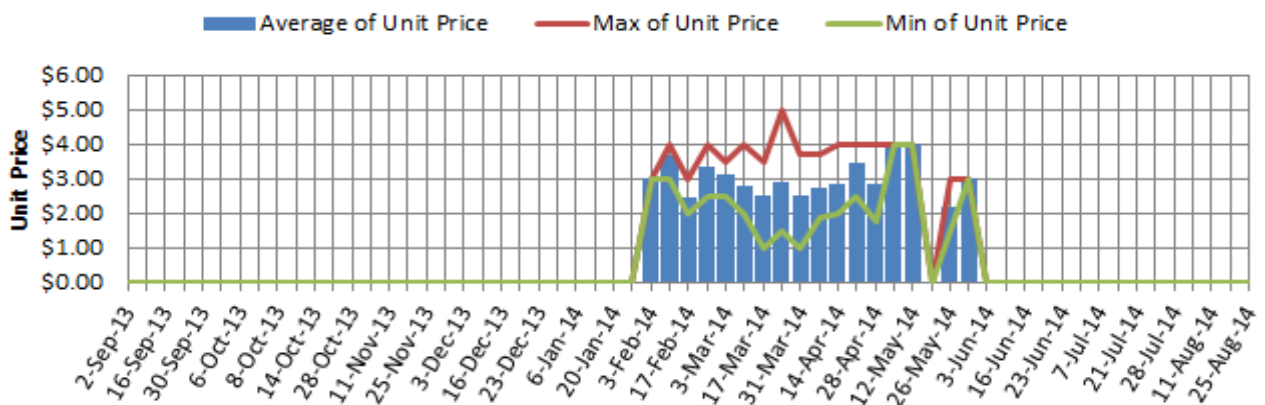


Assessment date (Week Commencing)

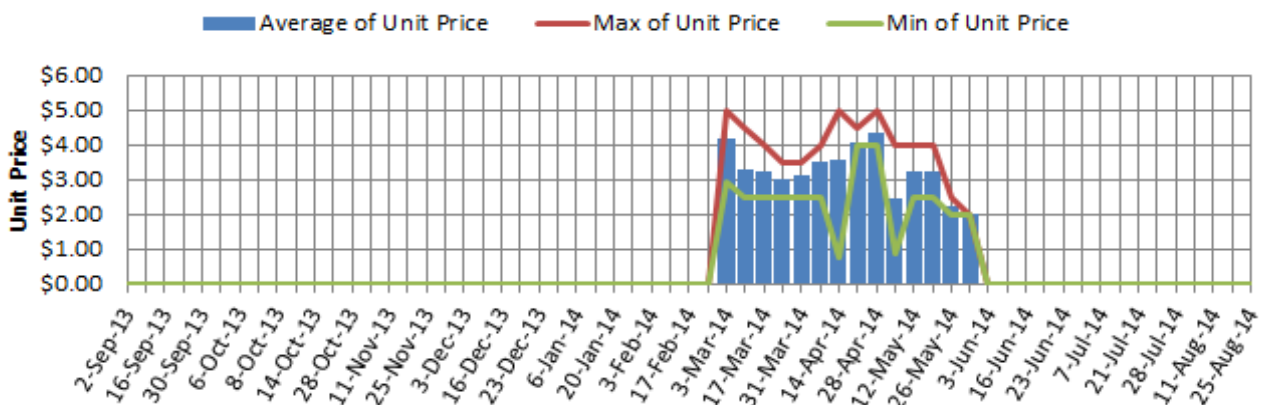
Shepard Avocado Average Retail Prices - Sydney



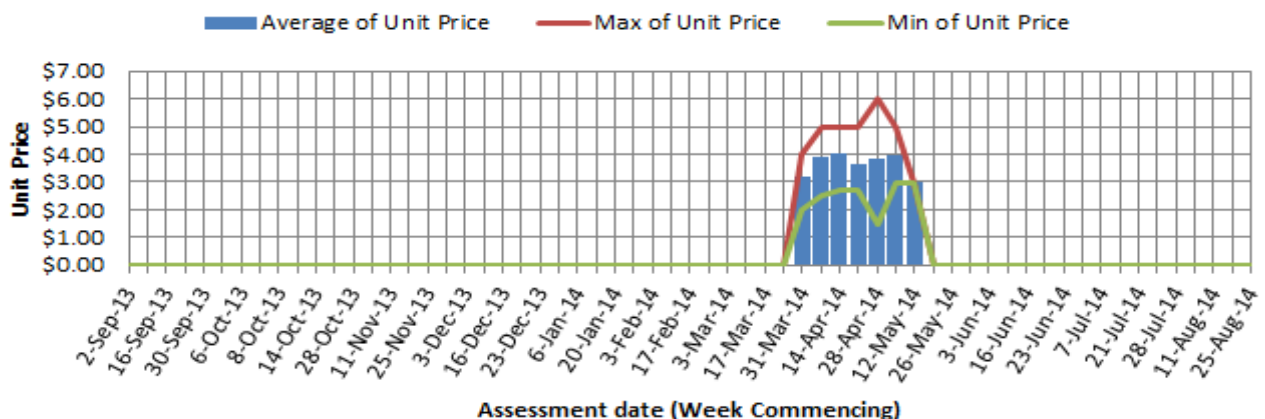
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 25th August 2014

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	225	1.99	Store	NZ	I	Hass	280	1.99	No	NS
Coles	Hass	295	2.48	No	Aus	I	Hass	190	1.99	No	Aus
Coles	Hass	245	2.48	No	Aus	Coles	Hass	270	2.00	Cat	Aus
Coles	Hass	230	2.48	No	Aus	Coles	Hass	170	2.00	Cat	Aus
Woolworths	Hass	275	2.98	No	Aus	Coles	Hass	230	2.00	Cat	Aus
Woolworths	Hass	270	2.98	No	Aus	I	Hass	240	2.69	No	Aus
Woolworths	Hass	260	2.98	Store	Aus	Woolworths	Hass	220	2.98	No	Aus
I	Hass	270	2.99	No	Aus	Woolworths	Hass	250	2.98	No	Aus
I	Hass	245	2.99	No	Aus	Woolworths	Hass	250	2.98	No	Aus
I	Hass	270	3.49	No	Aus	IGA	Hass	320	2.99	No	NZ
IGA	Hass	255	3.49	No	Aus	IS	Hass	250	2.99	No	NZ
Foodworks	Hass	265	3.79	No	Aus	I	Hass	280	2.99	No	Aus
I	Hass	290	3.99	No	Aus	I	Hass	310	2.99	No	Aus
I	Reed	360	3.99	No	Aus	I	Hass	270	3.98	No	Aus
I	Hass	320	3.99	No	Aus	I	Hass	300	3.99	No	Aus
I	Hass	340	4.99	No	Aus	I	Hass	295	3.99	No	Aus
I	Hass	305	4.99	No	Aus	PERTH					
BRISBANE						IGA	Hass	140	0.99	No	Aus
Woolworths	Hass	220	1.98	No	Aus	I	Hass	235	1.98	No	Aus
I	Hass	175	1.99	Store	Aus	Coles	Hass	230	2.48	No	Aus
I	Hass	220	1.99	No	Aus	Coles	Hass	180	2.48	No	Aus
Coles	Hass	200	2.48	No	Aus	Coles	Hass	165	2.48	No	Aus
Coles	Hass	200	2.48	No	Aus	I	Hass	220	2.79	No	Aus
Coles	Hass	200	2.48	No	Aus	Woolworths	Hass	205	2.98	No	Aus
I	Hass	185	2.50	No	Aus	Woolworths	Hass	190	2.98	No	Aus
IGA	Hass	180	2.68	No	Aus	Woolworths	Hass	190	2.98	No	Aus
Woolworths	Hass	285	2.98	No	Aus	I	Hass	270	2.99	No	Aus
Woolworths	Hass	255	2.98	No	Aus	IGA	Hass	260	2.99	No	Aus
I	Hass	300	2.99	Store	Aus	IGA	Hass	245	2.99	No	Aus
I	Hass	258	3.00	Store	Aus	IGA	Hass	255	2.99	No	Aus
I	Hass	275	3.29	Store	Aus	IS	Hass	250	3.49	No	Aus
IGA	Hass	215	3.99	No	Aus	I	Hass	255	3.98	No	Aus
I	Hass	255	3.99	No	Aus	I	Hass	275	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