



INFOCADO WEEKLY REPORT: 25th — 31st August 2012 (Wk 35)



Comments

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- Due to anticipated increasing supply over the next few months, the industry is supporting retail promotions with the major chains using levy funds during September and October. It is expected that these promotion activities at retail level will help to drive consumer demand at point of purchase during this period, so it is important that growers match this with supply, wherever mature fruit is available.
- You will all be receiving your seasonal forecast forms next week. These are the forecast figures that are used to develop the October Quarterly Report. Please review and update your forecasts carefully so that the October Report is as accurate and useful as possible for forward planning.
- Last week dispatches were around 40,000 trays higher than had been forecast. Please make sure that you think carefully when updating your four week forecasts. If the attractive market is driving your growers to send more fruit please consider this when updating you four week forecast so that a potential surplus of fruit in the market can be foreseen.

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

What you need to be aware of for next month

[Click here for tips for using and interpreting Infocado Reports](#)

- 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.

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

Upcoming Holidays

QLD Queens Birthday 1 October

Report Index

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IMPORTANT and PLEASE NOTE:

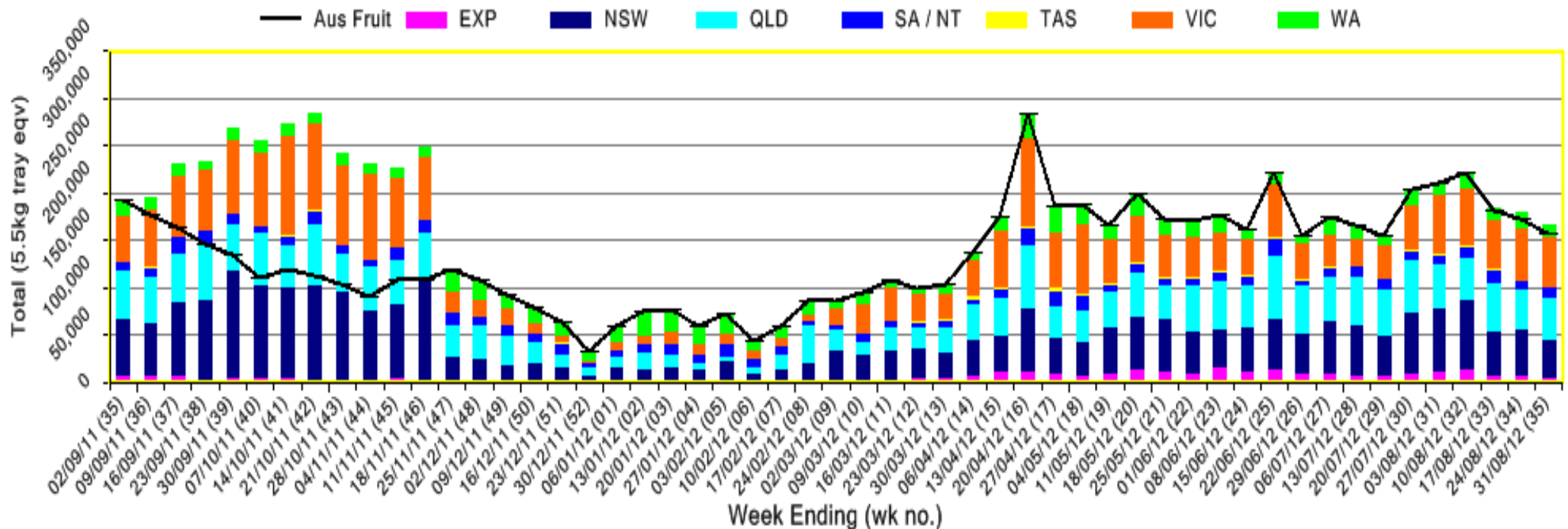
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 25th August - 31st August 2012 (Wk 35)

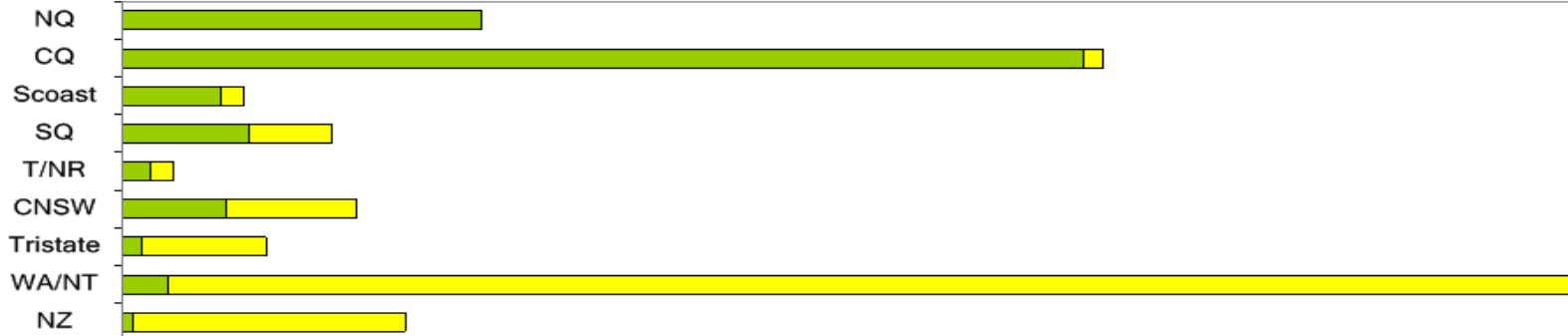
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv	
	<16	16	18	20	22	23	25	28	28+	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total	
EXP			430	606		50		1,219	2,116		4,421	406					5,159
NSW	712	1,827	4,886	8,485	539	6,996	5,364	1,529	411		30,749	4,231	4,459		1,000		39,435
QLD	11	265	1,011	4,996	811	5,935	12,422	4,070	151		29,672	6,954	6,838	2,500	130		44,038
SA / NT	16	1,320	1,724	3,391		1,567	848	935	144		9,945	448					10,760
TAS								480			480						480
VIC	86	2,212	8,039	18,770	639	8,429	6,080	2,000	1,045		47,300	2,108	8,772				52,728
WA	3	97	600	1,260		3,109	2,995	1,967			10,031	1,898					13,482
Total	828	5,721	16,690	37,508	1,989	26,086	28,189	11,720	3,867		132,598	16,045	20,069	2,500	1,130		166,080

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2012 to date = 5,048,551 5.5kg tray eqv

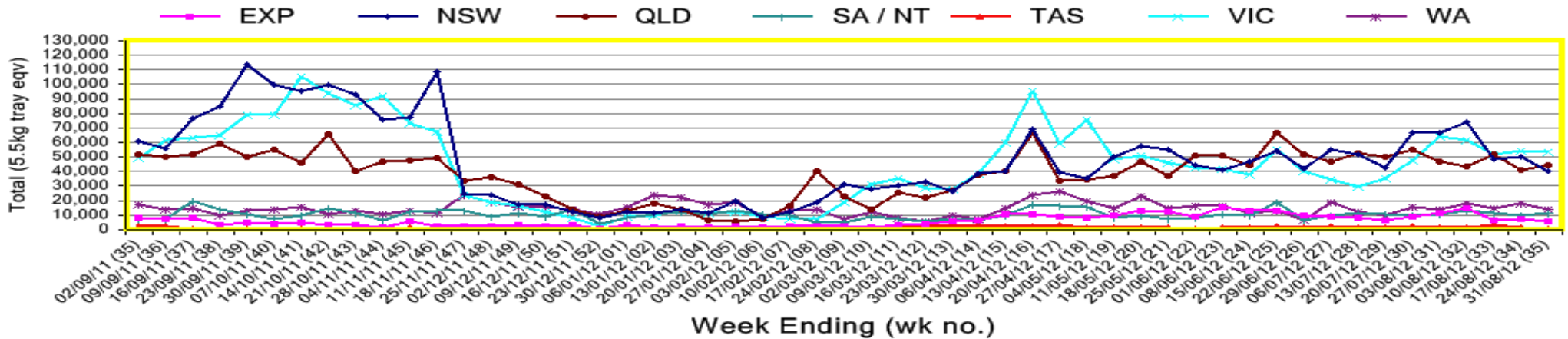


Percentage dispatched by region (Based on seasonal forecast - 2012)

■ 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 = 5,048,551 5.5kg tray eqv



Week 35 contributors - Packhouses

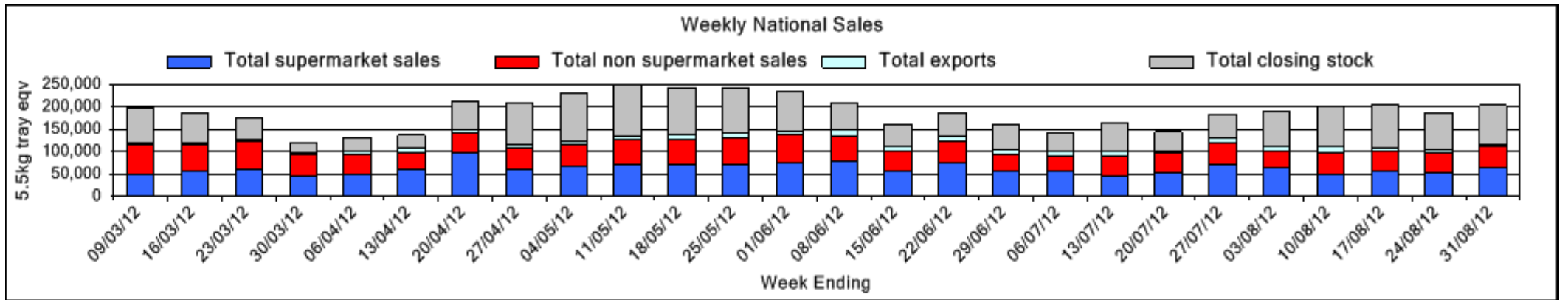
- | | |
|-----------------------------------|--------------------------------|
| Aussie Orchards Growers & Packers | KV & JM Lehmann |
| Avocado Industry Council (NZAGA) | Midcoast Avocados |
| Avowest | Natures Fruit Company |
| Balmoral Orchard | One Harvest |
| C F Fechner | Perseverance Farming Co |
| Chinoola Orchards | 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 | The Avocado Grove |
| Green Pear Avocado | Touchwood Farming |
| I & A Tolson | Wodonga Park Fruit and Nuts |
| Jirel Holdings | |

Week 35 contributors - Wholesalers

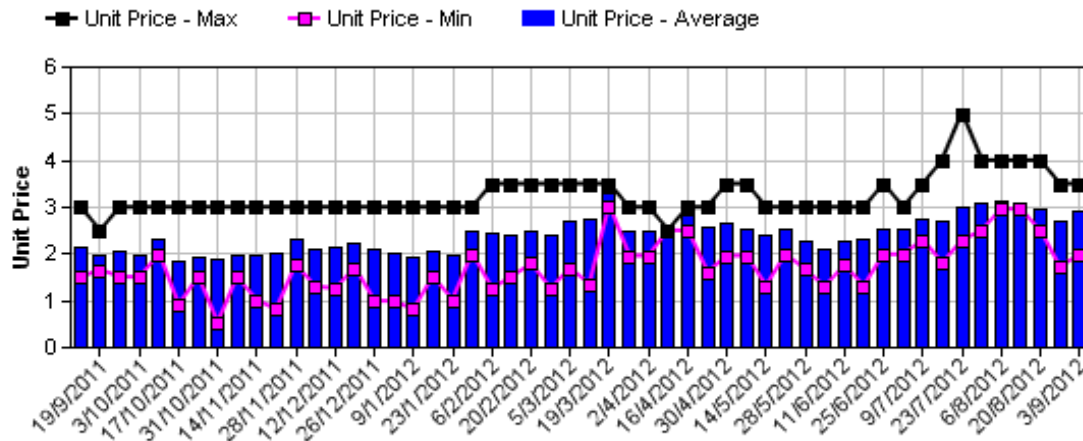
- | | |
|---------------------------------|---|
| Allcrops Pty Ltd (Sydney) | Fresh Express Produce Pty Ltd (Perth) |
| Costa Farms (Adelaide) | Kelly's (Melbourne) |
| Costa Farms (Brisbane) | Murray Bros (Brisbane) |
| Costa Farms (Melbourne) | Sculli & Co Pty Ltd (Melbourne) |
| Costa Farms (Perth) | 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) |

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

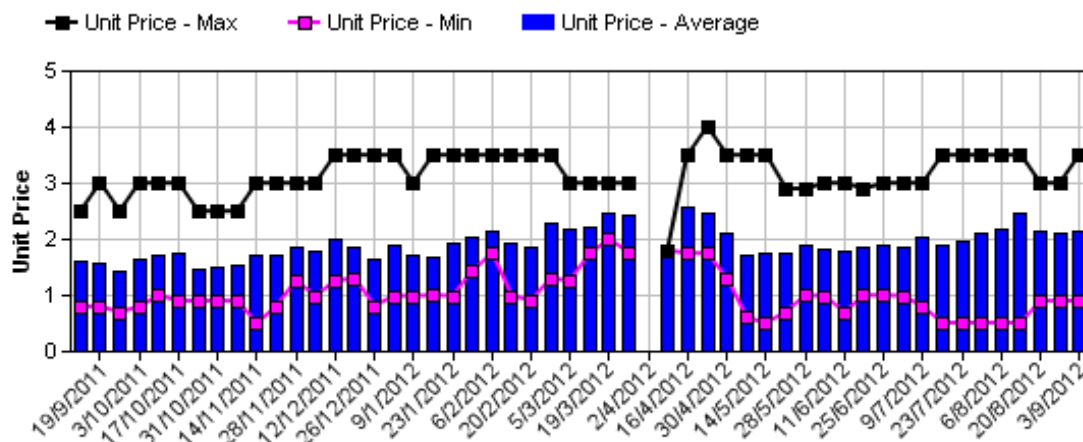
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	5,404			5,404						1,399			1,399	254	5,658			5,658
Total non supermarket sales	4,607			4,607	1,255			1,255	2,282						6,889			6,889
Total exports																		
Total sales	10,011			10,011	1,255			1,255	2,282	1,399			1,399	254	12,547			12,547
Total Stock on Hand	1,986			1,986	706			706	1,284						3,269			3,269
QLD																		
Total supermarket sales	27,190			27,190	130			130	236	5,188			5,188	943	28,370			28,370
Total non supermarket sales	15,065		230	15,295	1,221		35	1,256	2,284						17,285		294	17,579
Total exports	4,421			4,421	406			406	738						5,159			5,159
Total sales	46,676		230	46,906	1,757		35	1,792	3,258	5,188			5,188	943	50,814		294	51,108
Total Stock on Hand	27,531			27,531	274			274	498						28,029			28,029
SA & TAS																		
Total supermarket sales	11,233			11,233			342	342	622						11,233		622	11,855
Total non supermarket sales	3,554		183	3,737	932		119	1,051	1,911						5,249		399	5,648
Total exports																		
Total sales	14,787		183	14,970	932		461	1,393	2,533						16,482		1,021	17,503
Total Stock on Hand	16,503		72	16,575	2,742		356	3,098	5,633						21,488		719	22,208
VIC																		
Total supermarket sales	14,436			14,436						6,840			6,840	1,244	15,680			15,680
Total non supermarket sales	9,271		1,065	10,336	1,443		238	1,681	3,056	293			293	53	11,947		1,498	13,445
Total exports																		
Total sales	23,707		1,065	24,772	1,443		238	1,681	3,056	7,133			7,133	1,297	27,627		1,498	29,125
Total Stock on Hand	15,363		573	15,936	6,419		81	6,500	11,818	353			353	64	27,098		720	27,819
WA																		
Total supermarket sales	1,626			1,626											1,626			1,626
Total non supermarket sales	2,270			2,270	1,168			1,168	2,124						4,394			4,394
Total exports																		
Total sales	3,896			3,896	1,168			1,168	2,124						6,020			6,020
Total Stock on Hand	5,575		83	5,658	740			740	1,345						6,920		83	7,003
Total																		
Total supermarket sales	59,890			59,890	130		342	472	858	13,427			13,427	2,441	62,567		622	63,189
Total non supermarket sales	34,766		1,478	36,245	6,019		392	6,411	11,656	293			293	53	45,763		2,191	47,954
Total exports	4,421			4,421	406			406	738						5,159			5,159
Total sales	99,077		1,478	100,555	6,555		734	7,289	13,253	13,720			13,720	2,495	113,490		2,813	116,302
Total Stock on Hand	66,958		728	67,686	10,881		437	11,318	20,578	353			353	64	86,806		1,523	88,328



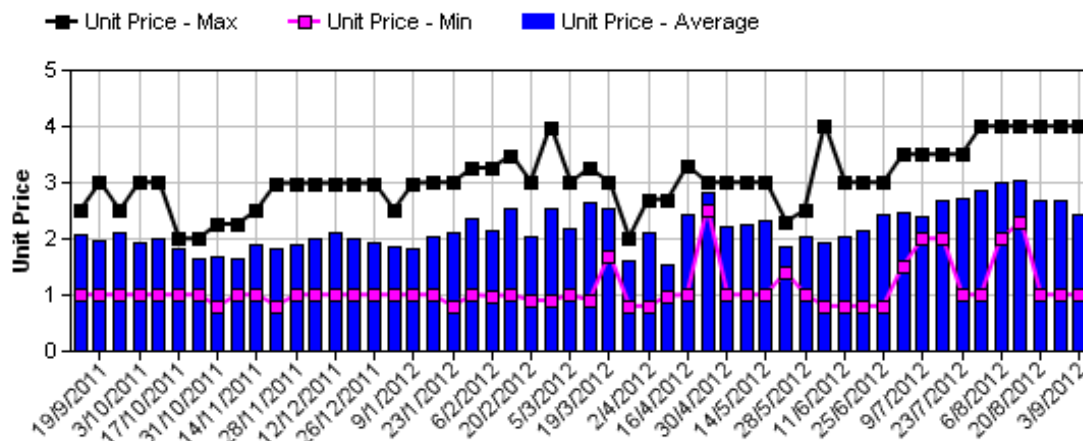
Hass Avocado Average Retail Prices - Sydney



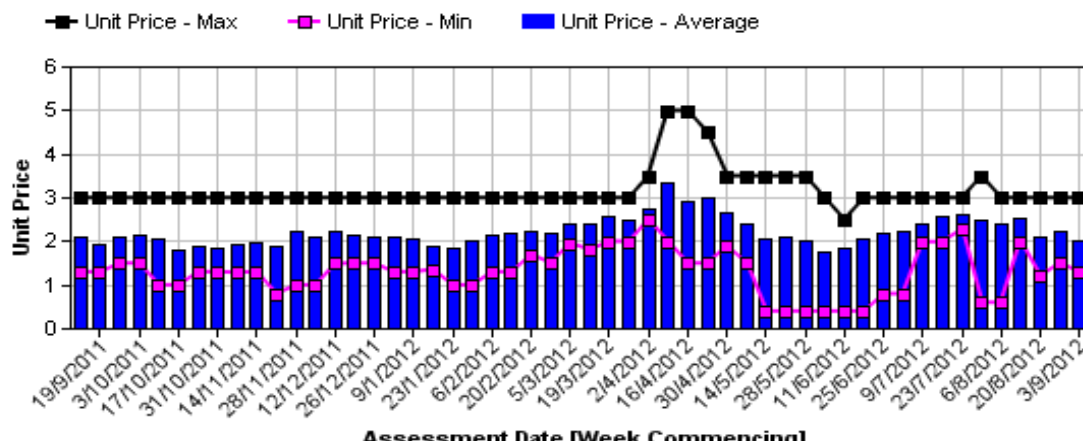
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

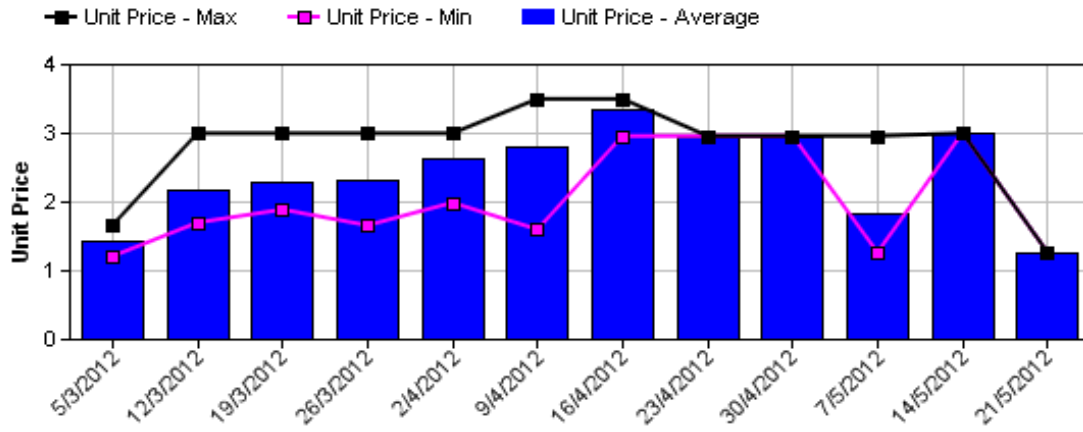


Hass Avocado Average Retail Prices - Perth

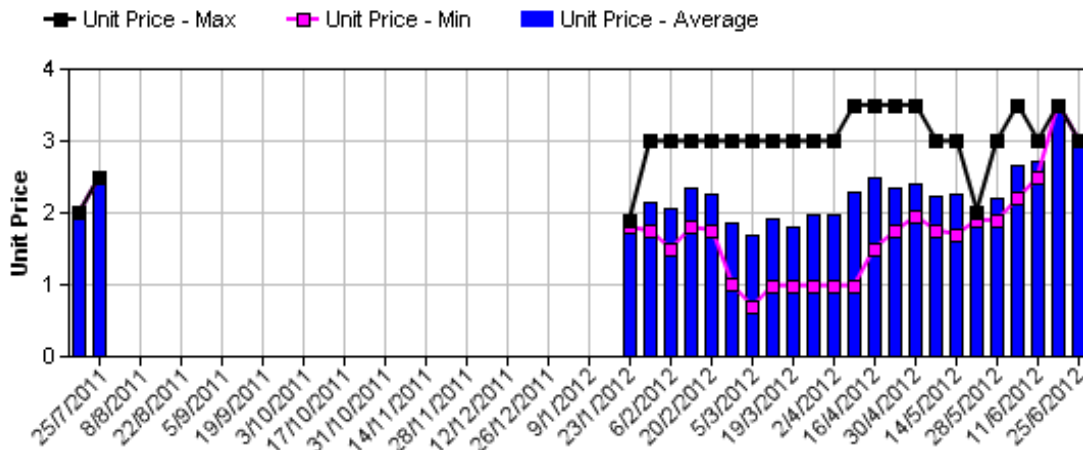


Assessment Date [Week Commencing]

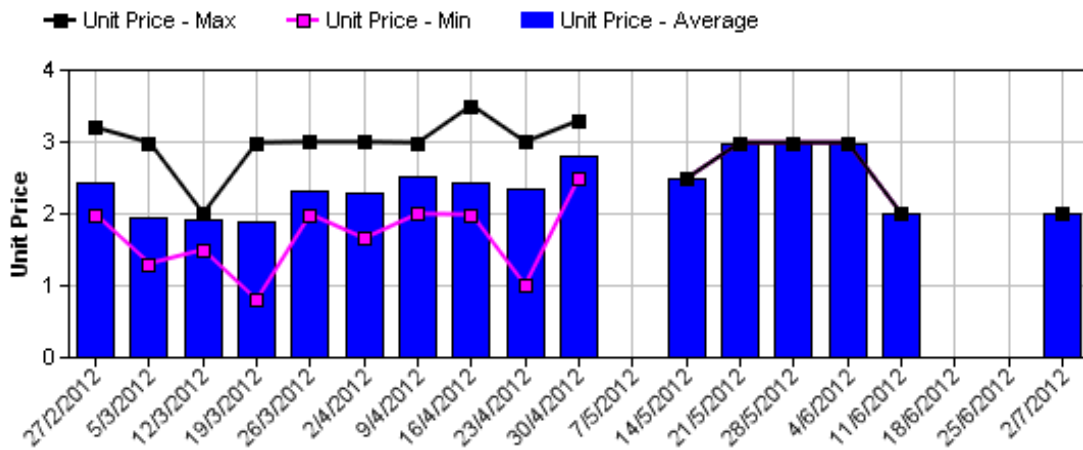
Shepard Avocado Average Retail Prices - Sydney



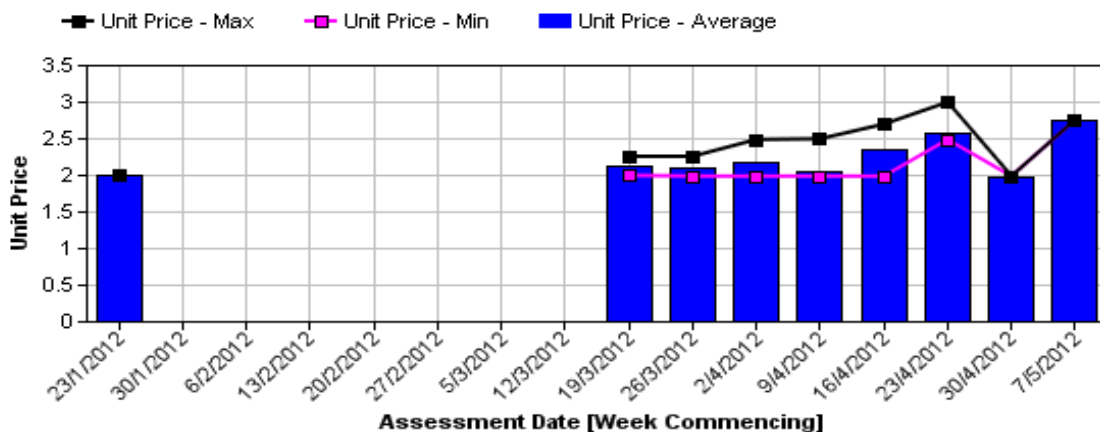
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Retail Prices by City, Store and Variety - 3rd September 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
Foodworks	Hass	190	1.49	Store	Aus
IC	Hass	200	1.66	Store	Aus
IC	Hass	190	1.66	Store	Aus
IGA	Hass	185	1.95	No	Aus
I	Reed	550	1.99	No	Aus
IC	Hass	200	1.99	No	Aus
I	Hass	255	1.99	No	Aus
I	Hass	210	1.99	No	Aus
Woolworths	Hass	300	2.38	Store	Aus
I	Hass	210	2.49	No	Aus
I	Reed	460	2.49	No	Aus
I	Reed	430	2.49	No	Aus
I	Reed	430	2.49	No	Aus
Coles	Hass	260	2.68	No	Aus
Coles	Hass	270	2.68	No	Aus
Coles	Hass	260	2.68	No	Aus
Woolworths	Hass	260	2.68	No	Aus
IGA	Hass	280	2.95	No	Aus
Coles	Hass	240	2.98	No	Aus
Woolworths	Hass	285	2.98	No	Aus
Coles	Hass	265	2.98	No	Aus
IC	Hass	290	2.99	No	Aus
I	Hass	255	2.99	No	Aus
I	Hass	270	2.99	No	Aus
I	Hass	270	2.99	No	Aus
IGA	Hass	200	2.99	No	Aus
Foodworks	Hass	265	2.99	No	Aus
I	Hass	310	3.49	No	Aus
IC	Hass	305	3.49	No	Aus
IC	Hass	330	3.49	No	Aus
SYDNEY					
I	Hass	180	0.89	Store	Aus
I	Hass	109	1	Store	Aus
Woolworths	Hass	200	1.5	No	Aus
IGA	Hass	195	1.59	Store	Aus
IGA	Hass	200	1.99	No	Aus
I	Hass	165	1.99	Store	Aus
IGA	Hass	200	2.28	No	Aus
Woolworths	Hass	1.75	2.28	No	Aus
Coles	Hass	240	2.28	No	Aus
Coles	Hass	220	2.28	No	Aus
Woolworths	Hass	190	2.28	No	Aus
Coles	Hass	220	2.28	No	Aus
I	Hass	305	2.5	Store	Aus
Coles	Hass	220	2.98	Store	Aus
IC	Fuerte	420	2.99	No	NS
I	Wurtz	235	2.99	Store	Aus
I	Hass	325	2.99	Store	Aus
I	Hass	220	2.99	No	Aus
I	Fuerte	320	2.99	No	Aus
I	Hass	220	2.99	No	Aus
I	Hass	290	3.49	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	215	0.99	Store	NS
Safeway	Hass	245	1.83	Cat	Aus
Safeway	Hass	260	1.83	Cat	Aus
Safeway	Hass	290	1.83	Cat	Aus
I	Hass	245	1.99	No	Aus
I	Hass	260	1.99	Cat	Aus
I	Hass	245	2.29	No	NS
I	Hass	250	2.29	No	NS
I	Hass	310	2.69	No	NS
I	Hass	300	2.69	No	Aus
Coles	Hass	270	2.78	No	Aus
Coles	Hass	245	2.78	No	Aus
IGA	Hass	270	2.99	No	Aus
I	Hass	300	2.99	No	Aus
IC	Hass	305	3.48	No	Aus
I	Hass	275	3.99	No	Aus
PERTH					
I	Hass	145	0.99	No	Aus
I	Hass	150	1.29	Store	Aus
IGA	Hass	220	1.69	Cat	Aus
IGA	Hass	240	1.69	Cat	Aus
IGA	Hass	310	1.69	Cat	Aus
IGA	Hass	235	1.69	Cat	Aus
IS	Hass	190	1.79	Store	Aus
Coles	Hass	250	1.98	No	Aus
Woolworths	Hass	220	1.98	No	Aus
Woolworths	Hass	215	1.98	Store	Aus
Woolworths	Hass	215	1.98	Store	Aus
Coles	Hass	200	1.98	No	Aus
Coles	Hass	240	1.98	No	Aus
I	Hass	255	1.99	Store	Aus
I	Hass	230	2.49	No	Aus
IS	Hass	310	2.89	No	Aus
I	Hass	295	2.99	No	Aus
I	Hass	245	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