



INFOCADO WEEKLY REPORT: 23rd — 29th August 2014 (Wk 35)



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Comments

- The average retail price per Hass avocado has remained steady across the major cities. The largest movement of retail price was seen in Sydney where the highest retail price reduced slightly (refer page 6).
- The steady volume of avocados continue to be dispatched from TRI, WA and NZ, volumes slightly inflated from past weeks (refer page 2).
- The four weekly forecast continues to be updated with the expected trend now appearing 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).

What you need to be aware of for next month

The Central Queensland regional Qualicado workshop is to be held on the 11 September 2014. AAL would like to invite all growers / packers in the area to attend. For more information please visit the AAL website or contact our office directly.

Avocado Campaign Awareness Reaches New Heights

MT14014 Fruit Tracking Study is a longitudinal quantitative research study that provides an ongoing measure into the effectiveness of marketing and advertising investment over time. The main aim of this market research study is to record changes to consumer attitudes and behaviour over time across a number of fruit categories and specifically avocados.

The research is carried out by conducting numerous online surveys throughout the year across a random representative audience of Australia. The results are published in three combined reports in July, November and March. The latest report has successfully captured the impact of the new marketing campaign as data collection straddled the launch date of the new campaign.

On a combined basis the prompted advertising recall has jumped to its highest level in 12 months and increased wave on wave from 15% to 24%. More importantly looking specifically at April vs. June the prompted advertising awareness increased significantly from 10% in April to an impressive 37% in June. This great result confirms that the advertising is being seen by consumers and is being remembered.

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:

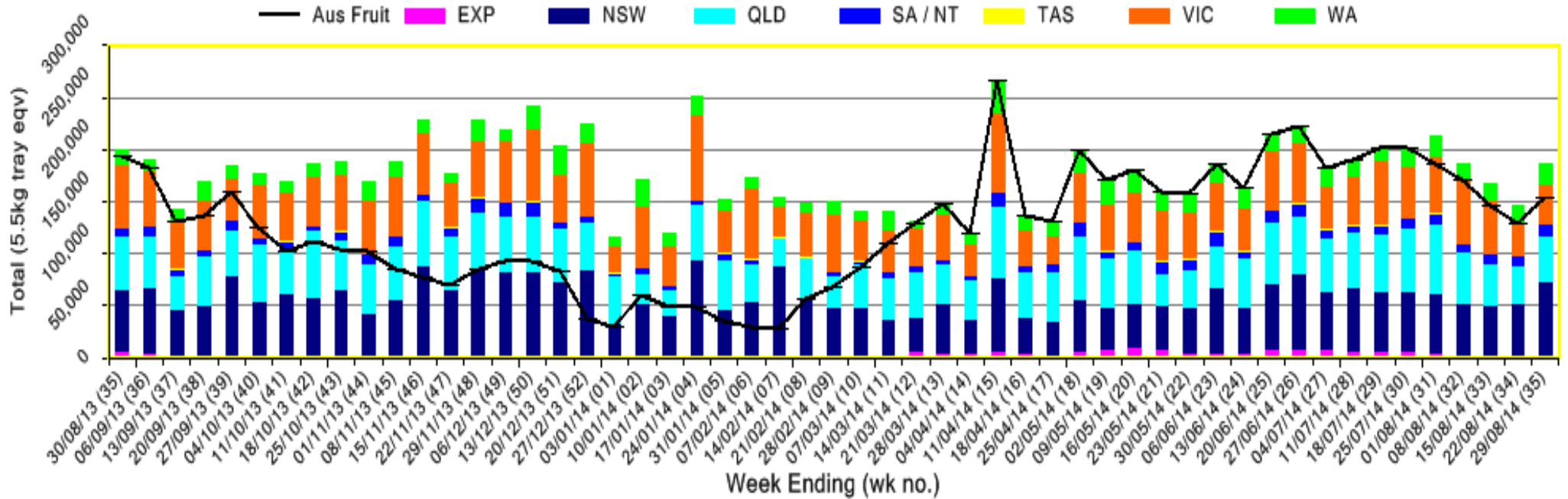
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 23rd August - 29th August 2014 (Wk 35)

Dest. State	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								247	508	755				755
NSW	93	1,555	4,709	22,026	365	15,580	15,301	3,014	2,903	65,546	3,083	120		71,173
QLD	24	822	2,171	6,030	24	7,770	10,021	7,421	3,102	37,385	3,321	2,360	2,820	44,365
SA / NT		100	2,237	3,006		640	524	3,482	93	10,082	513	240		11,059
TAS								640		640				640
VIC	477	777	2,558	9,003	37	9,654	11,535	1,797	1,152	36,990	848	174		38,564
WA	47	246	431	3,627		5,940	5,604	3,197		19,092	1,247			21,359
Total	641	3,500	12,106	43,692	426	39,584	43,625	19,158	7,758	170,490	9,012	2,894	2,820	187,914

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 5,975,385 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 35 - 39)

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

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	214,513	7,519	3,500	2,000	229,184
Lamb Hass	500	30			555
Week Total	215,013	7,549	3,500	2,000	229,738

Week 37 - begin 06/09/2014

Hass	248,206	7,240	3,500	1,000	262,188
Lamb Hass	500	30			555
Week Total	248,706	7,270	3,500	1,000	262,742

Week 38 - begin 13/09/2014

Hass	264,920	5,790	3,500	1,000	276,265
Week Total	264,920	5,790	3,500	1,000	276,265

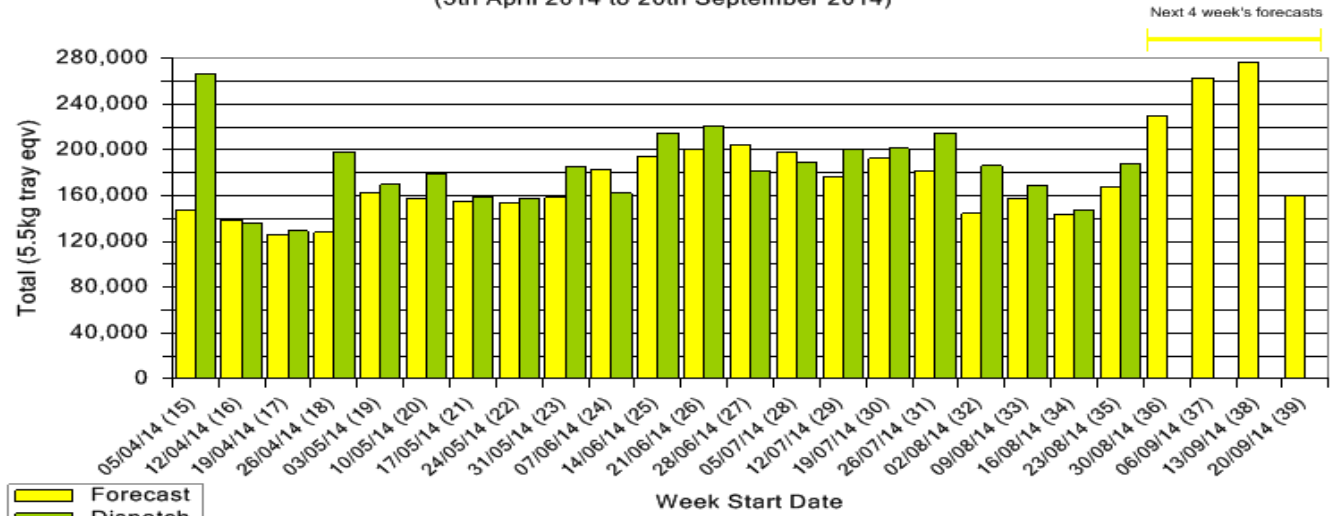
Week 39 - begin 20/09/2014

Hass	149,125	5,615	2,500	500	159,880
Week Total	149,125	5,615	2,500	500	159,880

Dispatch Data (Week 35 - begin 23/08/2014)

Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Hass	168,646	8,999	2,894	2,320	185,956
Reed	586	2			590
Wurtz	1,258	11		500	1,369
Total	170,490	9,012	2,894	2,820	187,914

Dispatch vs weekly forecast - all varieties and all packs
(5th April 2014 to 26th September 2014)

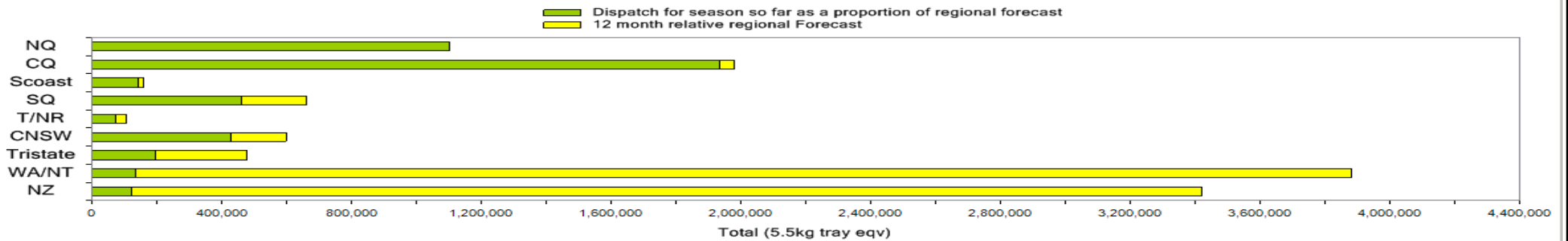


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

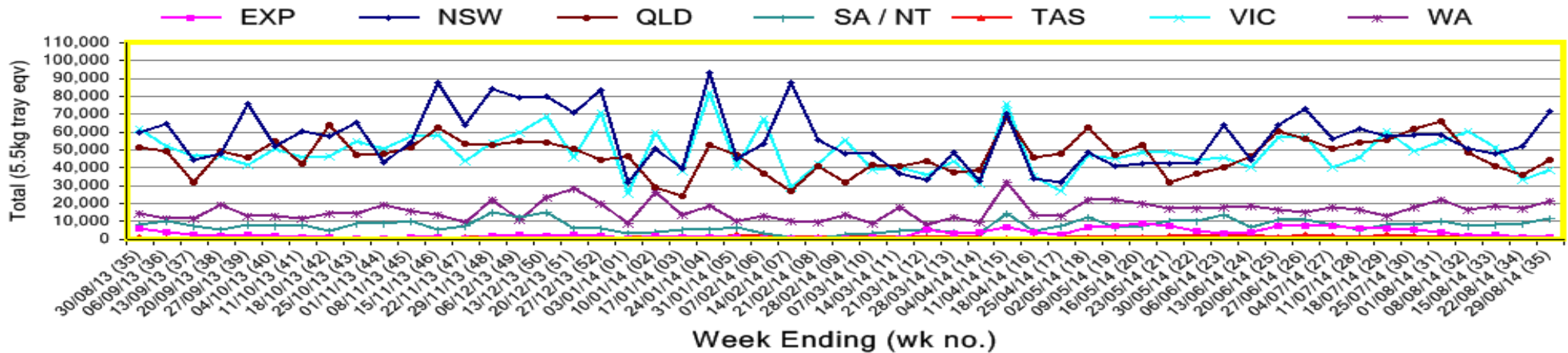
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347
Australia (from Infocado)	123,747									123,747
USA¹										
Japan¹										
Other Asia¹										
Total	123,747									123,747

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 = 5,975,385 5.5kg tray eqv



Week 35 contributors - Packhouses

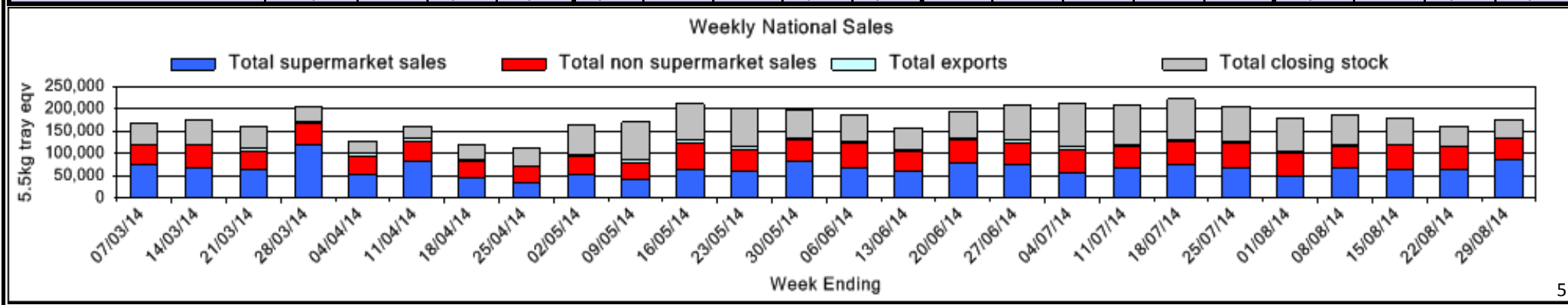
Natures Fruit Company (Consolidator)	Vitor Marketing Pty Ltd (TRI)
One Harvest (Consolidator)	Bonyaricall Vineyards (TRI)
Sunfresh (Consolidator)	Golden Hill Packing Pty Ltd (TRI)
The Avolution (Consolidator)	KV & JM Lehmann (TRI)
I & A Tolson (CNSW)	Marrbiz Pty Ltd (TRI)
Coastal Avocados (CNSW)	Green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

Week 35 contributors - Wholesalers

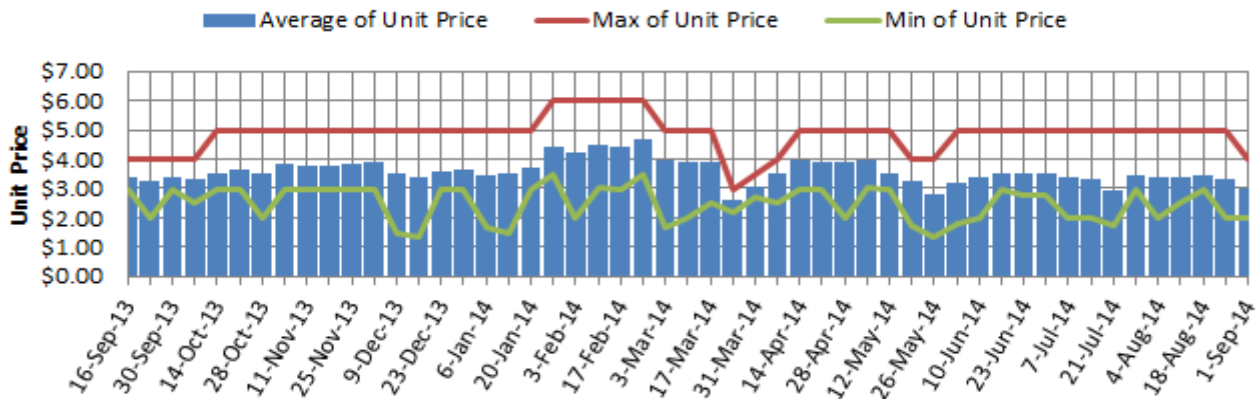
C & S Ponte Produce Pty Ltd (Melbourne)	Murray Bros (Brisbane)
Costa Farms (Adelaide)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Melbourne)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Dykes Bros (Melbourne)	The La Manna Group (Adelaide)
Etherington (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)

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

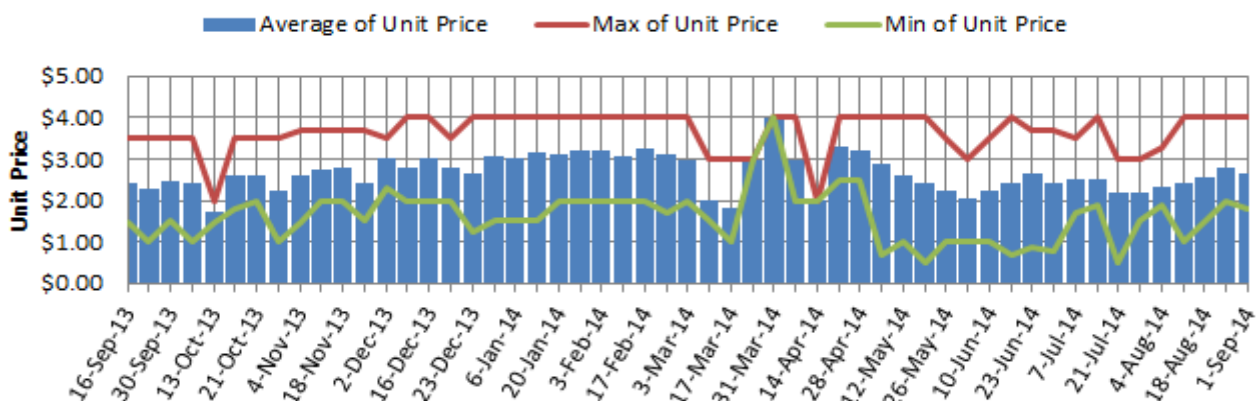
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	31,243			31,243	1,262			1,262	2,295	120			120	22	33,559			33,559
Total Stock on Hand																		
QLD																		
Total supermarket sales	17,585			17,585	920			920	1,673	2,360			2,360	429	19,687			19,687
Total non supermarket sales	15,942		160	16,102	1,310		60	1,370	2,491						18,324		269	18,593
Total exports	755			755										755				755
Total sales	34,282		160	34,442	2,230		60	2,290	4,164	2,360			2,360	429	38,766		269	39,035
Total Stock on Hand	13,669		160	13,829	18			18	33						13,702		160	13,862
SA & TAS																		
Total supermarket sales	10,759			10,759						240			240	44	10,803			10,803
Total non supermarket sales	4,511		21	4,532	1,343			1,343	2,442						6,953		21	6,974
Total exports																		
Total sales	15,270		21	15,291	1,343			1,343	2,442	240			240	44	17,755		21	17,776
Total Stock on Hand	8,861		166	9,027	110			110	200						9,061		166	9,227
VIC																		
Total supermarket sales	18,220			18,220	384			384	698	174			174	32	18,950			18,950
Total non supermarket sales	9,853		1,261	11,114	1,713		288	2,001	3,638	10			10	2	12,969		1,785	14,754
Total exports																		
Total sales	28,073		1,261	29,334	2,097		288	2,385	4,336	184			184	33	31,919		1,785	33,704
Total Stock on Hand	6,531		2,075	8,607	1,160			1,160	2,109						8,641		2,075	10,716
WA																		
Total supermarket sales	6,770			6,770	292			292	531						7,301			7,301
Total non supermarket sales	3,656			3,656	787			787	1,431						5,087			5,087
Total exports																		
Total sales	10,426			10,426	1,079			1,079	1,962						12,388			12,388
Total Stock on Hand	5,619			5,619	381			381	693						6,312			6,312
Total																		
Total supermarket sales	82,880			82,880	1,884			1,884	3,425	2,894			2,894	526	86,832			86,832
Total non supermarket sales	35,659		1,442	37,101	6,127		348	6,475	11,773	10			10	2	46,801		2,075	48,876
Total exports	755			755										755				755
Total sales	119,294		1,442	120,736	8,011		348	8,359	15,198	2,904			2,904	528	134,387		2,075	136,462
Total Stock on Hand	34,898		2,401	37,300	2,053			2,053	3,733						38,631		2,401	41,032



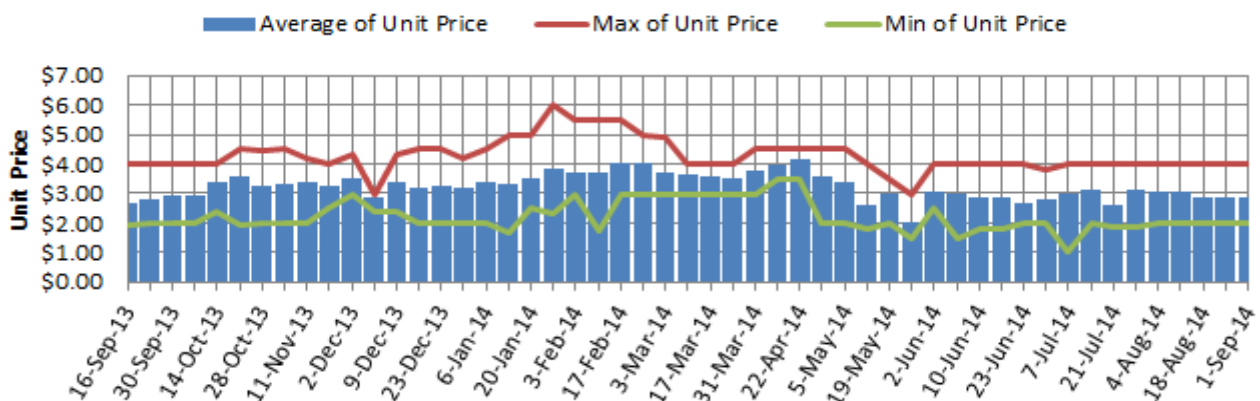
Hass Avocado Average Retail Prices - Sydney



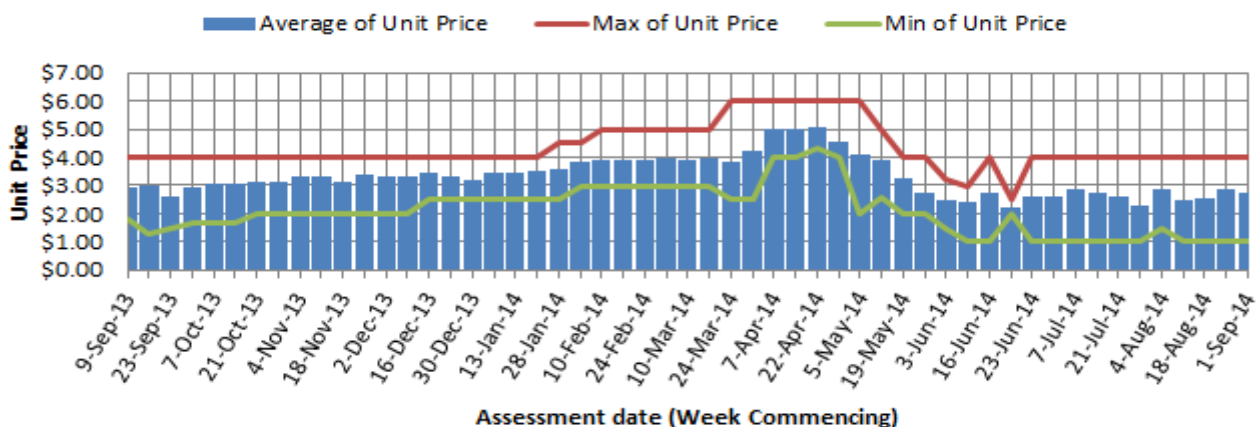
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

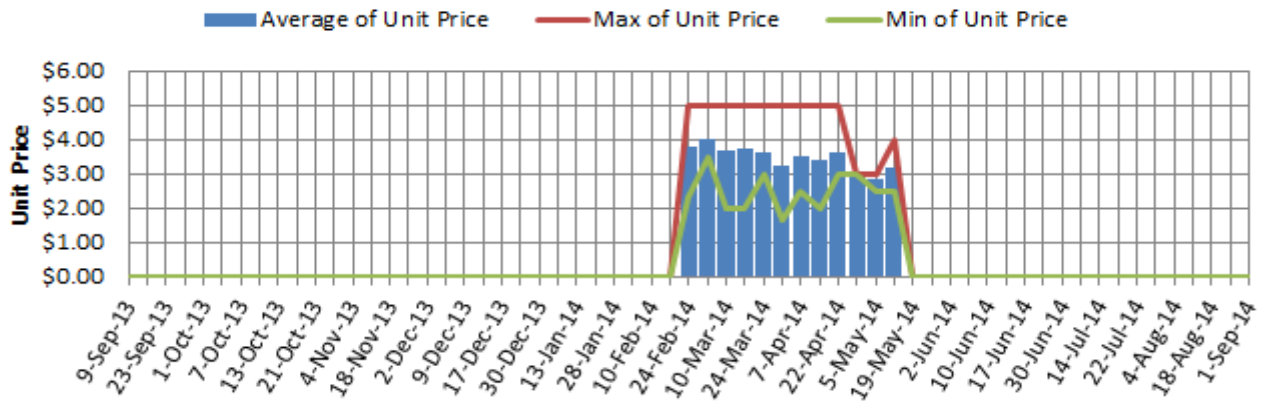


Hass Avocado Average Retail Prices - Perth

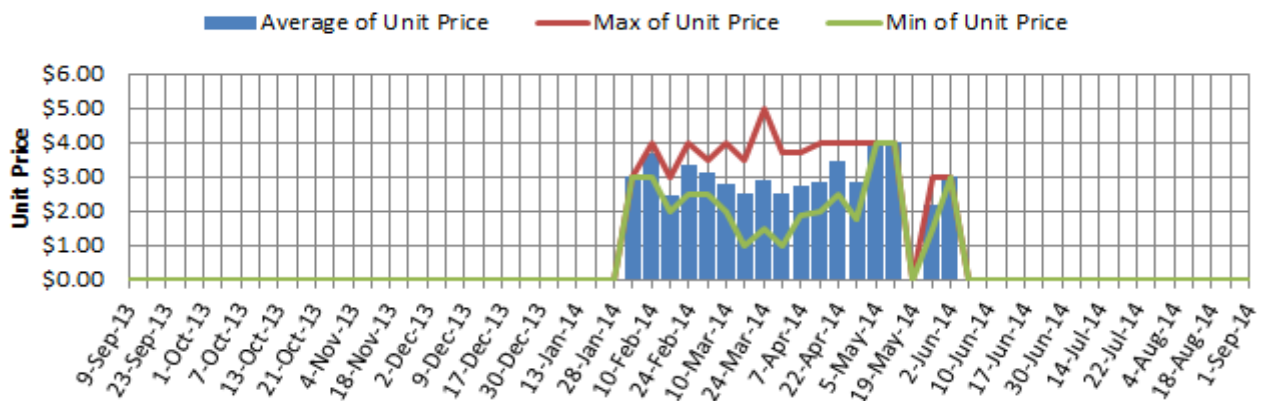


Assessment date (Week Commencing)

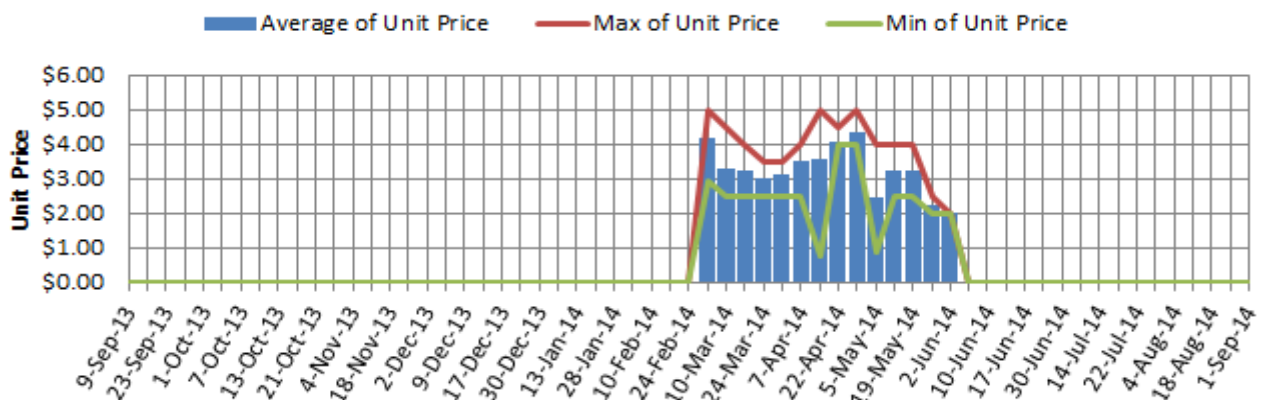
Shepard Avocado Average Retail Prices - Sydney



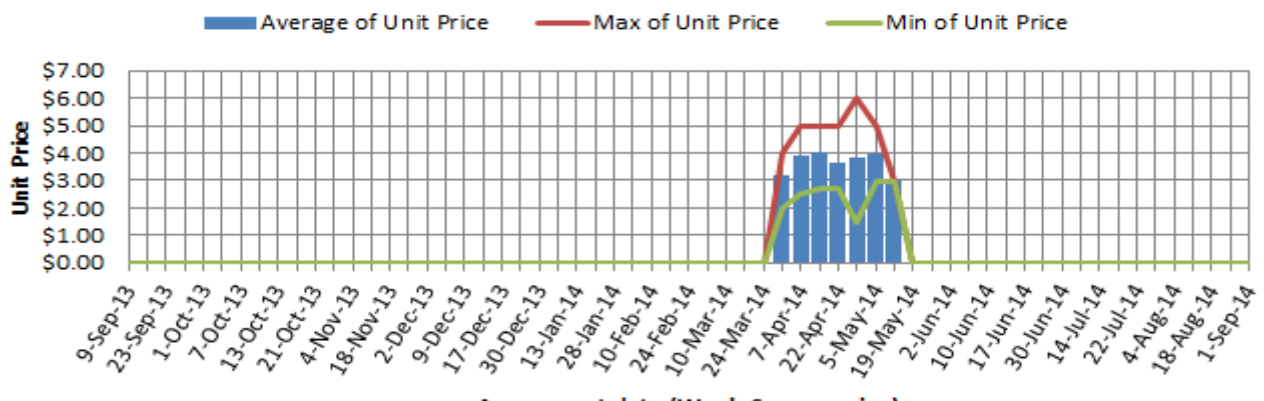
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 1st September 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
Woolworths	Hass	260	1.98	No	Aus
Woolworths	Hass	250	1.98	No	Aus
Woolworths	Hass	270	1.98	No	Aus
Coles	Hass	250	2.00	Cat	Aus
Coles	Hass	240	2.00	Cat	Aus
IGA	Hass	210	2.49	Store	NZ
I	Hass	270	2.99	No	Aus
I	Hass	250	2.99	No	Aus
Foodworks	Hass	300	3.49	No	Aus
I	Hass	245	3.49	No	Aus
I	Hass	270	3.49	No	Aus
I	Hass	330	3.99	No	Aus
I	Hass	300	3.99	No	Aus
I	Hass	330	3.99	No	Mixed
I	Hass	290	3.99	No	Aus
BRISBANE					
Coles	Hass	200	1.80	Store	Aus
Coles	Hass	200	1.80	Store	Aus
Coles	Hass	190	1.80	Store	Aus
I	Hass	220	1.99	No	Aus
I	Hass	205	1.99	Store	Aus
Woolworths	Hass	200	2.48	No	Aus
I	Hass	185	2.50	No	Aus
I	Reed	270	2.50	No	Aus
IGA	Hass	190	2.68	No	Aus
Woolworths	Hass	210	2.98	No	Aus
Woolworths	Hass	215	2.98	No	Aus
I	Hass	275	3.00	No	Aus
I	Hass	300	3.29	No	Aus
IGA	Hass	210	3.99	No	Aus
I	Hass	310	3.99	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	180	1.99	No	Aus
Coles	Hass	240	2.00	Store	Aus
Coles	Hass	190	2.00	Store	Aus
I	Hass	200	2.40	No	Aus
I	Hass	320	2.49	No	Aus
I	Hass	280	2.69	No	Aus
Safeway	Hass	225	2.98	No	Aus
Woolworths	Hass	250	2.98	No	Aus
Woolworths	Hass	270	2.98	No	Aus
IGA	Hass	240	2.99	No	NZ
IS	Hass	260	2.99	No	NZ
I	Hass	270	2.99	No	Aus
I	Hass	280	3.79	No	Aus
I	Hass	280	3.98	No	Aus
I	Hass	320	3.99	No	Aus
PERTH					
IGA	Hass	120	0.99	No	Aus
I	Hass	225	1.98	No	Aus
Coles	Hass	210	2.00	Store	Aus
Coles	Hass	160	2.48	No	Aus
Woolworths	Hass	215	2.48	No	Aus
Coles	Hass	180	2.48	No	Aus
Woolworths	Hass	210	2.48	No	Aus
Woolworths	Hass	195	2.48	No	Aus
I	Hass	220	2.79	No	Aus
I	Hass	235	2.99	No	Aus
IGA	Hass	270	2.99	No	Aus
IGA	Hass	265	2.99	No	Aus
IGA	Hass	280	2.99	No	Aus
IS	Hass	265	3.49	No	Aus
I	Hass	275	3.99	No	Aus
I	Hass	255	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