



INFOCADO WEEKLY REPORT: 30th August—5th September 2014 (Wk 36)



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Comments

- The average retail price per Hass avocado continues to remain steady across the major cities (refer page 6).
- This weeks dispatches fell slightly short of the weeks forecast though the total supply continues to gently increase. AAL would like to thank all packhouses for contributing their weekly data (refer page 3).
- The NQ & CQ region have finished their harvest for 2014 with SC, SQ, TNR & CNSW expected to closely follow (refer page 4).
- Whilst the steady volume of avocados continue to be dispatched from TRI, WA and NZ, volumes are slightly increasing week to week (refer page 4).

What you need to be aware of for next month

The Central Queensland regional Qualicado workshop is to be held on 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:

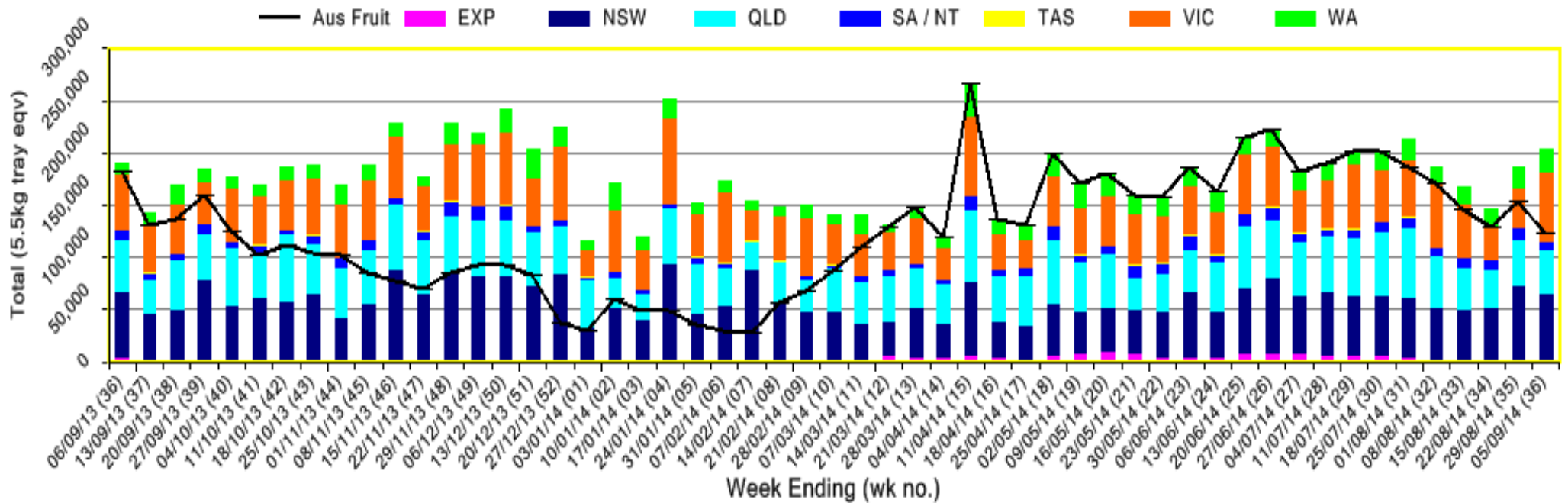
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 30th August - 5th September 2014 (Wk 36)

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								492	632	1,124				1,124
NSW		2,221	4,684	13,749		12,454	13,635	5,923	5,397	58,063	3,322	60		64,114
QLD		630	1,801	6,939	287	7,821	10,159	7,283	1,426	36,346	2,243	4,360	2,860	41,737
SA / NT	3	243	1,124	1,636		237	952	1,551	185	5,931	472	240		6,833
TAS							800			800				800
VIC	7	2,487	6,138	17,775	27	12,872	14,418	5,226	4,098	63,048	2,312	240		67,296
WA	98	171	623	2,733	2,295	3,749	6,051	4,706	98	20,524	1,238			22,775
Total	108	5,752	14,370	42,832	2,609	37,133	46,015	25,181	11,836	185,836	9,587	4,900	2,860	204,678

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 6,180,064 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

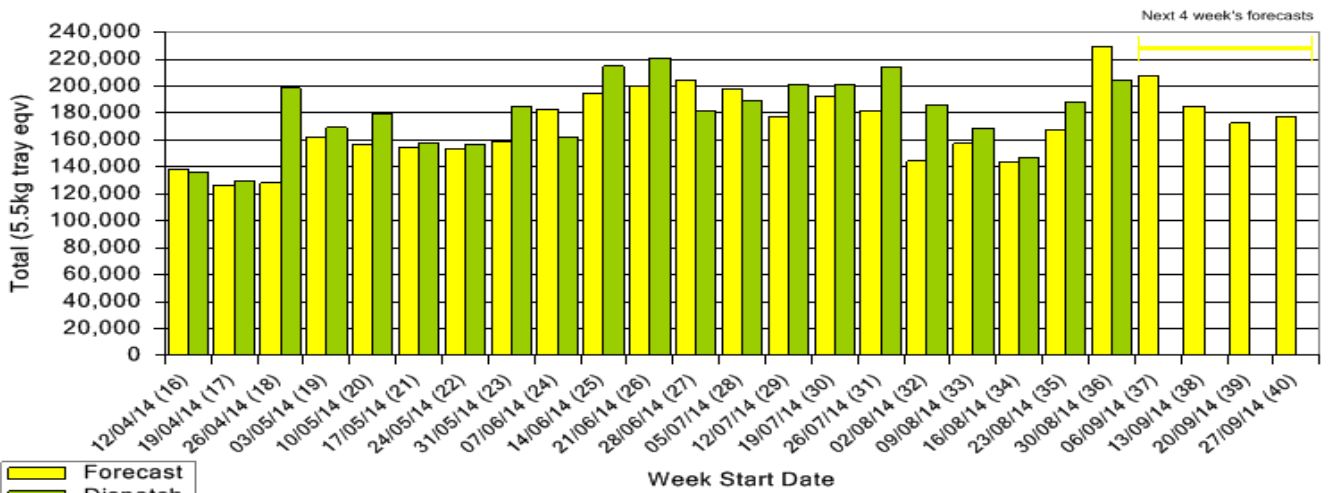
Forecast Data (Week 36 - 40)

Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
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	189,956	7,460	3,500	1,200	204,374
Lamb Hass	400	120			618
Wurtz	2,000	300		860	2,701
Week Total	192,356	7,880	3,500	2,060	207,694
Week 38 - begin 13/09/2014					
Hass	172,756	6,200	3,500	1,000	184,847
Lamb Hass	120	40			193
Week Total	172,876	6,240	3,500	1,000	185,039
Week 39 - begin 20/09/2014					
Hass	161,936	5,583	2,500	500	172,633
Week Total	161,936	5,583	2,500	500	172,633
Week 40 - begin 27/09/2014					
Hass	169,836	3,580	2,500	500	176,891
Week Total	169,836	3,580	2,500	500	176,891

Dispatch Data (Week 36 - begin 30/08/2014)

Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Fuerte		192			349
Hass	185,330	9,203	4,900	2,000	203,318
Lamb Hass	506	170			815
Sharwil		6			11
Wurtz		16		860	185
Total	185,836	9,587	4,900	2,860	204,67

Dispatch vs weekly forecast - all varieties and all packs (12th April 2014 to 3rd October 2014)

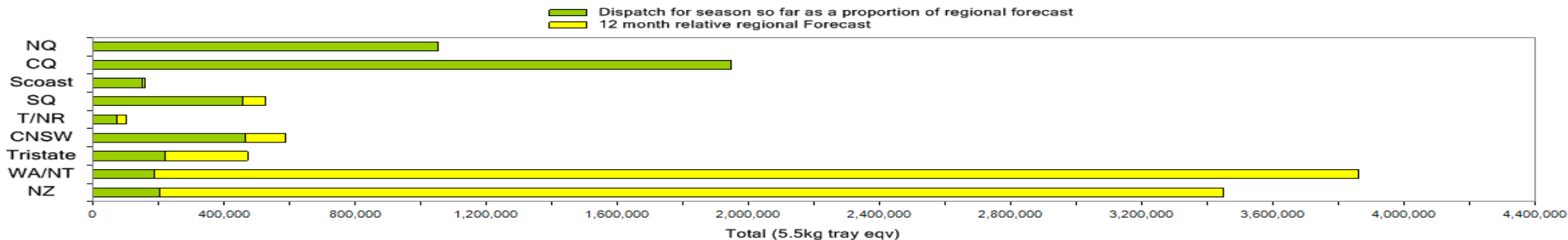


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

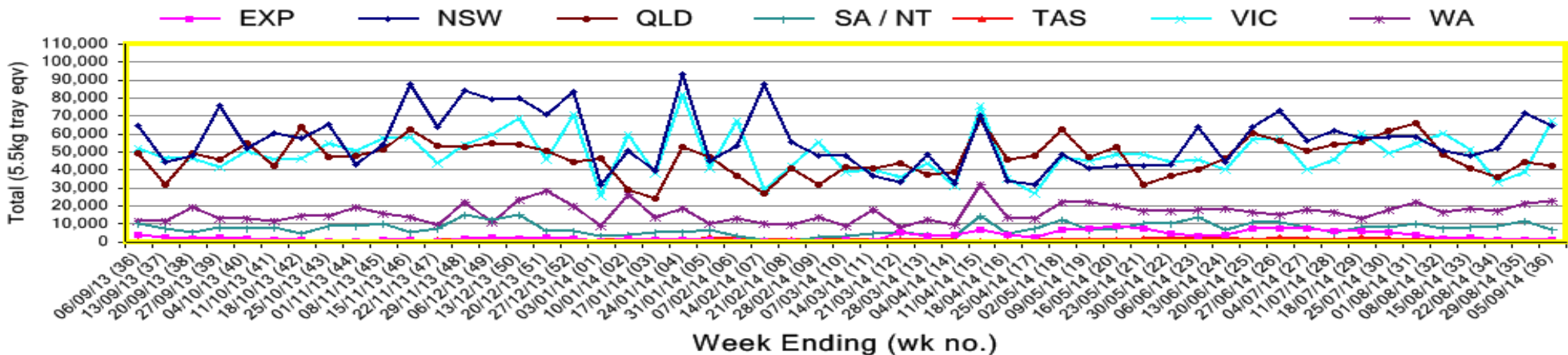
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347
Australia (from Infocado)	123,747	81,529								205,276
USA¹										
Japan¹										
Other Asia¹										
Total	123,747	81,529								205,276

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 = 6,180,064 5.5kg tray eqv



Week 36 contributors - Packhouses

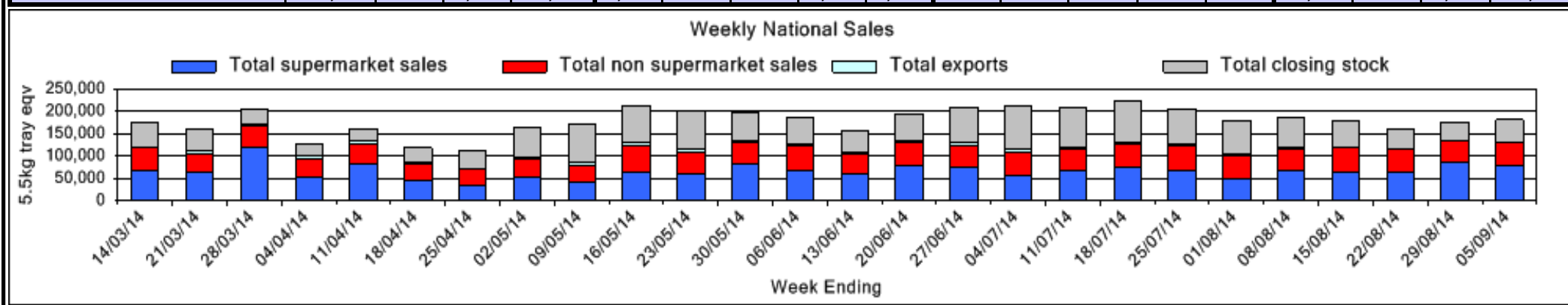
Natures Fruit Company (Consolidator)	Wodonga Park Fruit and Nuts (SQ)
One Harvest (Consolidator)	Googa Farms (SQ)
Sunfresh (Consolidator)	Golden Hill Packing Pty Ltd (TRI)
The Avolution (Consolidator)	KV & JM Lehmann (TRI)
I & A Tolson (CNSW)	Marrbiz Pty Ltd (TRI)
Coastal Avocados (CNSW)	The Avocado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

Week 36 contributors - Wholesalers

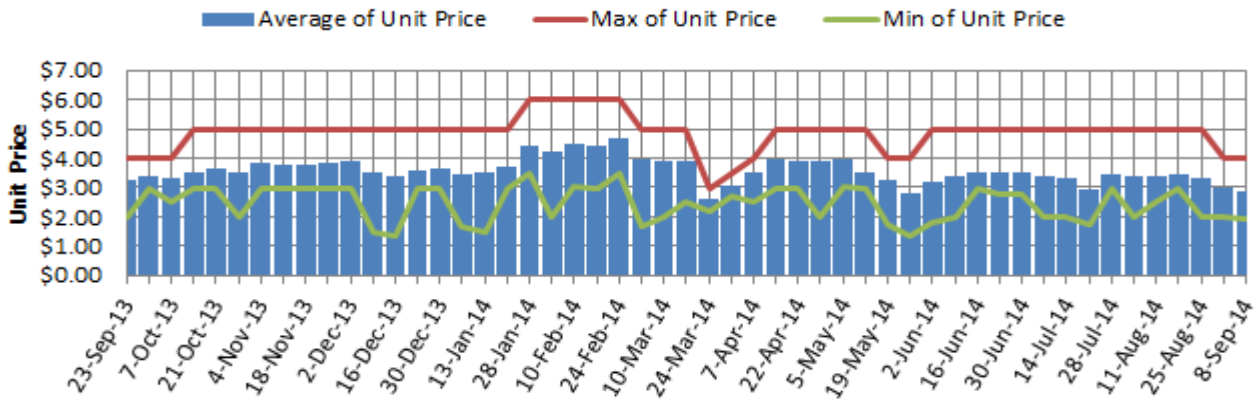
C & S Ponte Produce Pty Ltd (Melbourne)	Fresh Express Produce Pty Ltd (Perth)
Costa Farms (Adelaide)	Murray Bros (Brisbane)
Costa Farms (Brisbane)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Melbourne)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Dykes Bros (Melbourne)	The La Manna Group (Adelaide)
Etherington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

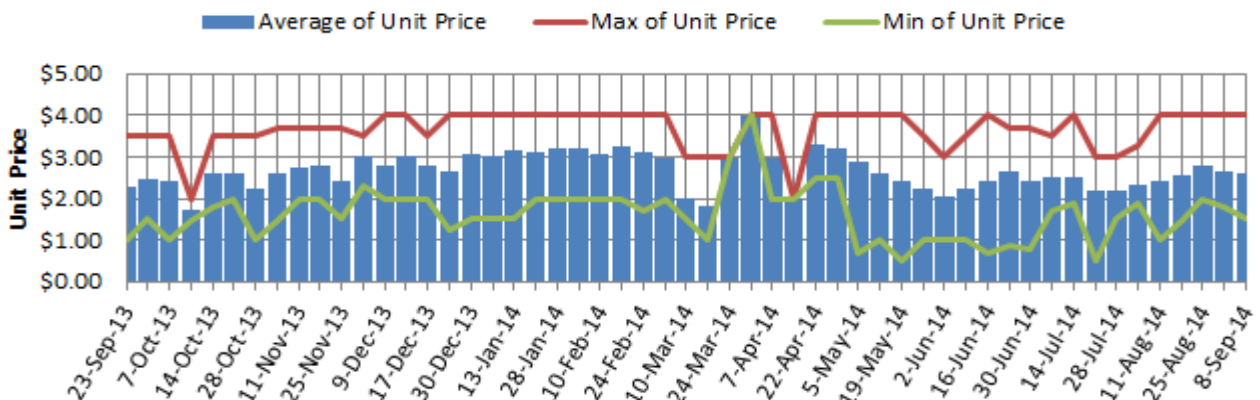
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	13,068			13,068	1,051			1,051	1,911	60			60	11	14,990			14,990
Total Stock on Hand																		
QLD																		
Total supermarket sales	23,933		160	24,093	96			96	175	360			360	65	24,173		160	24,333
Total non supermarket sales	16,926		160	17,086	1,240		290	1,530	2,782						19,181		687	19,868
Total exports	668			668											668			668
Total sales	41,527		320	41,847	1,336		290	1,626	2,956	360			360	65	44,022		847	44,869
Total Stock on Hand	14,991			14,991	404			404	735						15,726			15,726
SA & TAS																		
Total supermarket sales	9,066			9,066	192			192	349	240			240	44	9,459			9,459
Total non supermarket sales	3,879		6	3,885	559			559	1,016						4,895		6	4,901
Total exports																		
Total sales	12,945		6	12,951	751			751	1,365	240			240	44	14,354		6	14,360
Total Stock on Hand	10,852		160	11,012	419			419	762						11,614		160	11,774
VIC																		
Total supermarket sales	24,701			24,701						240			240	44	24,745			24,745
Total non supermarket sales	11,708		2,106	13,814	1,903		402	2,305	4,191						15,168		2,836	18,005
Total exports																		
Total sales	36,409		2,106	38,515	1,903		402	2,305	4,191	240			240	44	39,913		2,836	42,749
Total Stock on Hand	10,081		876	10,957	498		15	513	933	1			1		10,986		903	11,890
WA																		
Total supermarket sales	9,735			9,735	136			136	247						9,982			9,982
Total non supermarket sales	3,751			3,751	1,124			1,124	2,044						5,795			5,795
Total exports																		
Total sales	13,486			13,486	1,260			1,260	2,291						15,777			15,777
Total Stock on Hand	8,598			8,598	750			750	1,364						9,962			9,962
Total																		
Total supermarket sales	78,521		160	78,681	424			424	771	900			900	164	79,456		160	79,616
Total non supermarket sales	37,790		2,272	40,062	5,877		692	6,569	11,944						48,476		3,530	52,005
Total exports	1,124			1,124											1,124			1,124
Total sales	117,435		2,432	119,867	6,301		692	6,993	12,715	900			900	164	129,055		3,690	132,745
Total Stock on Hand	44,746		1,036	45,782	2,071		15	2,086	3,793	1			1		48,511		1,063	49,575



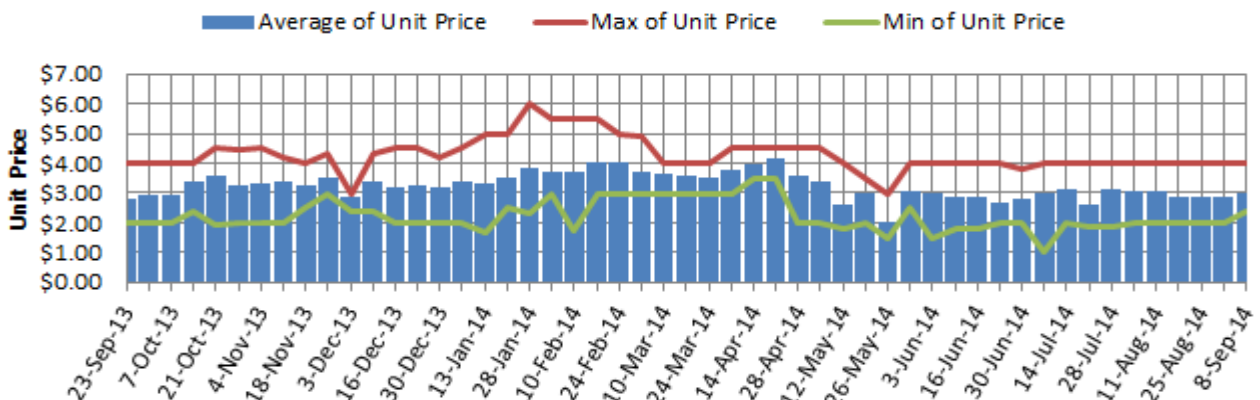
Hass Avocado Average Retail Prices - Sydney



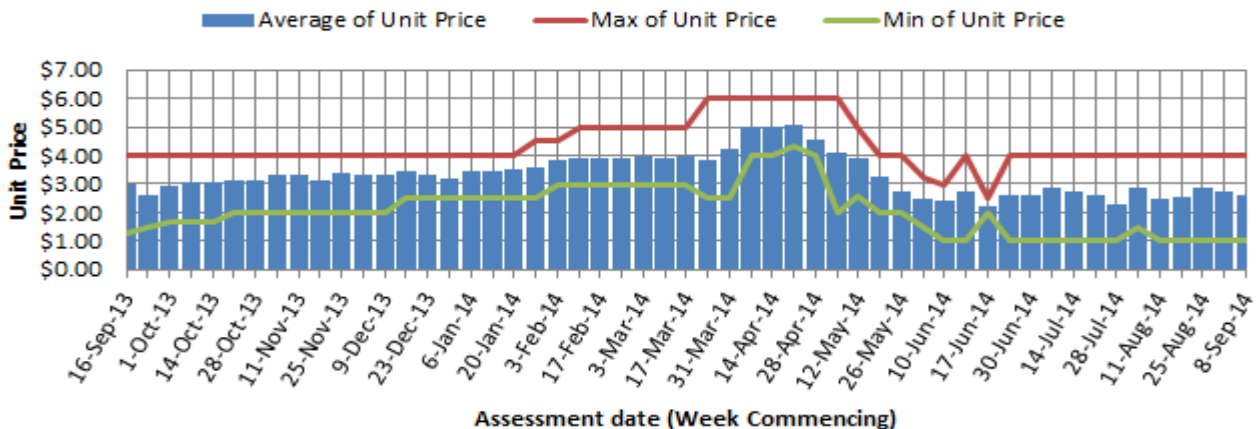
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

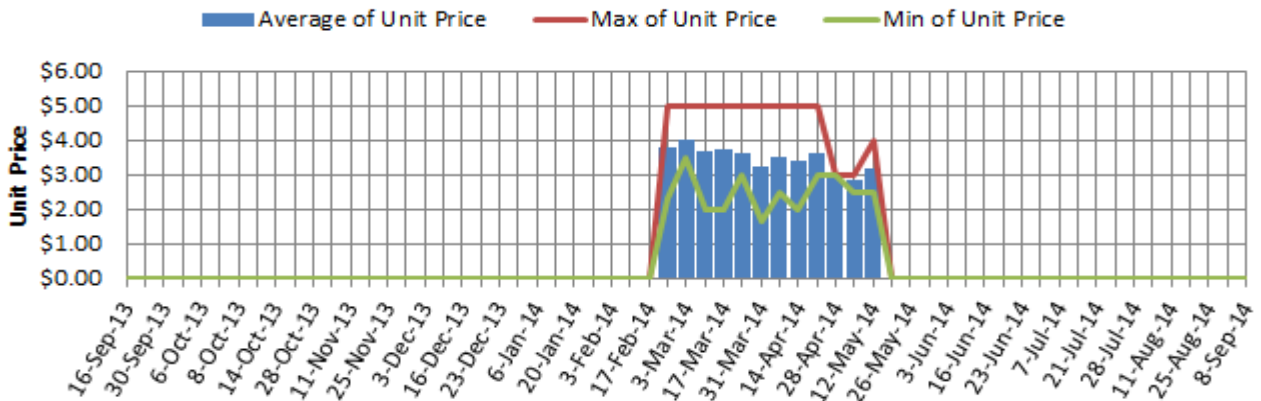


Hass Avocado Average Retail Prices - Perth

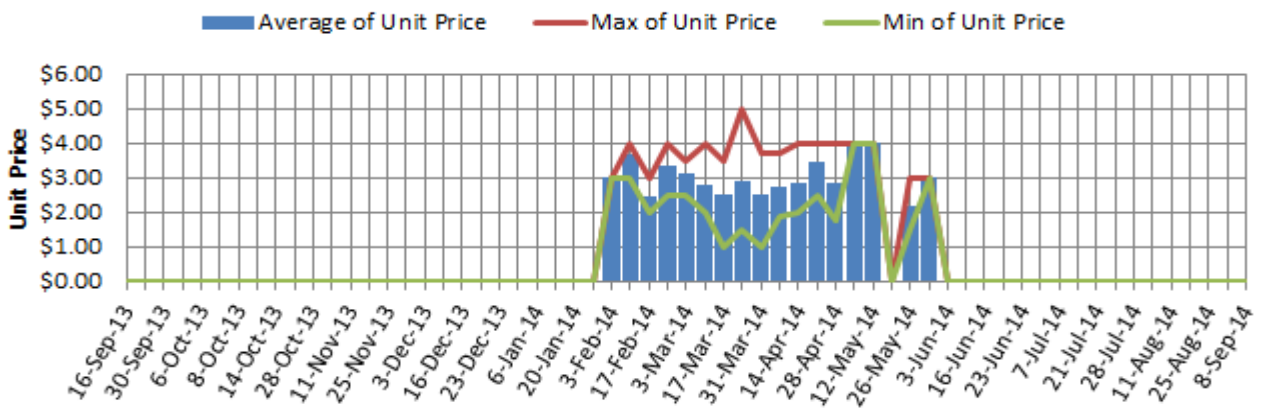


Assessment date (Week Commencing)

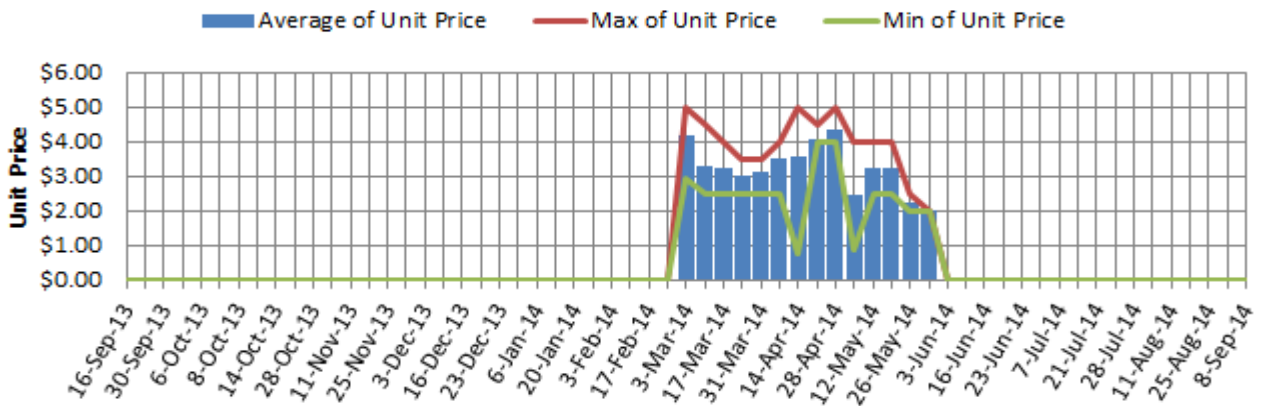
Shepard Avocado Average Retail Prices - Sydney



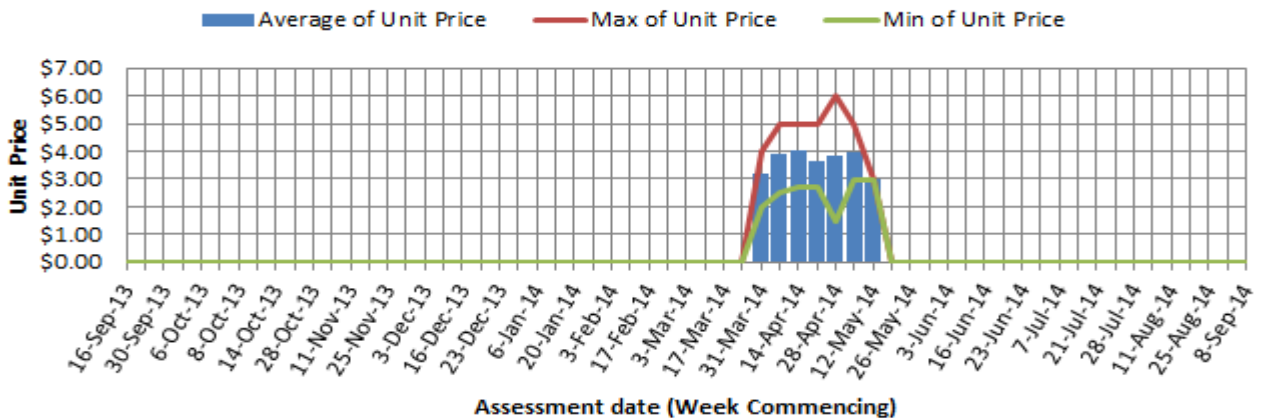
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 8th September 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
Coles	Hass	240	1.90	Cat	Aus
Coles	Hass	230	1.90	Cat	Aus
Coles	Hass	225	1.90	Cat	Aus
I	Hass	300	2.50	Store	NZ
I	Hass	325	2.50	No	NZ
Woolworths	Hass	280	2.98	No	Aus
Woolworths	Hass	240	2.98	No	Aus
IGA	Hass	205	2.98	No	NZ
I	Hass	310	2.98	No	NZ
Woolworths	Hass	250	2.98	No	Aus
I	Hass	235	2.99	No	Aus
I	Hass	255	2.99	No	Aus
I	Hass	235	2.99	No	Aus
Foodworks	Hass	300	3.49	No	Aus
IGA	Hass	220	3.49	No	Aus
I	Hass	275	3.99	No	Aus
BRISBANE					
I	Hass	205	1.50	Store	Aus
Coles	Hass	200	1.70	Store	Aus
Coles	Hass	200	1.70	Store	Aus
I	Hass	200	1.70	Store	Aus
I	Hass	165	1.99	No	Aus
I	Hass	200	1.99	No	Aus
IGA	Hass	220	2.68	No	Aus
Woolworths	Hass	200	2.88	Cat	Aus
Woolworths	Hass	280	2.88	Cat	Aus
Woolworths	Hass	270	2.88	Cat	Aus
I	Hass	260	3.00	No	Aus
I	Hass	300	3.29	No	Aus
IGA	Hass	255	3.99	No	Aus
I	Hass	285	3.99	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	185	2.40	No	Aus
Woolworths	Hass	310	2.48	No	Aus
Woolworths	Hass	205	2.48	No	Aus
I	Hass	270	2.49	No	Aus
I	Hass	290	2.49	No	Aus
I	Hass	190	2.49	No	NZ
I	Hass	280	2.69	No	Aus
Coles	Hass	240	2.98	No	Aus
Coles	Hass	190	2.98	No	Aus
Coles	Hass	200	2.98	No	Aus
IGA	Hass	250	2.99	No	NZ
IS	Hass	250	2.99	No	NS
I	Hass	250	3.39	No	Aus
I	Hass	300	3.98	No	Aus
I	Hass	280	3.99	No	Aus
I	Hass	360	3.99	No	Aus
PERTH					
IGA	Hass	130	0.99	No	Aus
I	Hass	220	1.68	No	Aus
Coles	Hass	235	1.70	Cat	Aus
Coles	Hass	185	1.70	Cat	Aus
Coles	Hass	190	1.70	Cat	Aus
I	Hass	220	2.79	No	Aus
Woolworths	Hass	210	2.98	No	Aus
Woolworths	Hass	200	2.98	No	Aus
Woolworths	Hass	200	2.98	No	Aus
I	Hass	265	2.99	No	Aus
I	Hass	260	2.99	No	Aus
IGA	Hass	250	2.99	No	Aus
IGA	Hass	265	2.99	No	Aus
IGA	Hass	270	2.99	No	Aus
IS	Hass	260	3.49	No	Aus
I	Hass	250	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