



INFOCADO WEEKLY REPORT: 8th — 14th September 2012 (Wk 37)



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- An updated New Zealand seasonal forecast can be seen on page three. The forecast has increased by 318,342 5.5kg eqv trays. The largest spikes are forecasted to occur from December 2012 through to February 2013.
- The retail price report this week shows that a number of Perth stores have specials in place. Other states have very few specials.
- Any growers who are expecting to begin harvesting in the coming weeks are reminded to enter their four weekly forecasts into the system. For a refresher on how to contribute your data please click on the instructions to your left.
- Dispatches were just over 40,000 5.5kg eqv trays more than originally forecasted for week 37. Volumes forecasted for the next four weeks appear steady at present. If you are thinking your forecast may change, please update it next week so that a potential surplus/deficit of fruit in the market can be foreseen.
- 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 should have received your seasonal forecast forms last 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.

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 [Australian Avocados Marketing Program Update](#).
- Based off the July 2012 Quarterly Report 851,280 5.5kg eqv trays are expected in the market place for October. 842,947 5.5kg eqv trays are expected for Hass. All packers are due to review their seasonal forecast this 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:

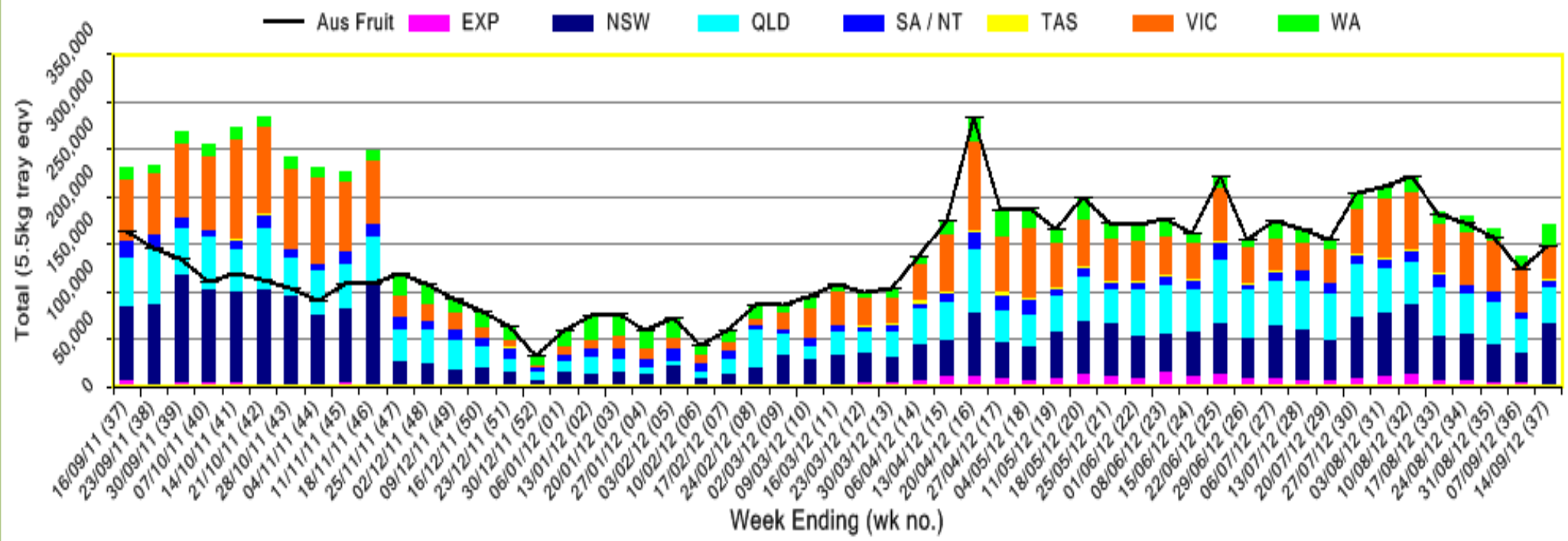
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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Industry Dispatches By Destination State and Count Size : 8th September - 14th September 2012 (Wk 37)

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	Oil	Proc	Other	5.5Kg Eqv Trays All	
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Kg	Total	
EXP				732	8			930	167	1,837	660						3,037
NSW	142	1,606	3,922	20,542	51	14,083	9,966	3,231	1,275	54,818	4,517	1,116	2,592		250	63,750	
QLD	386	1,928	4,155	8,237	379	5,739	6,143	3,614	1,680	32,261	2,283	880	7,920	1,000		38,194	
SA / NT		91	1,014	2,104		1,436	1,707	330		6,682	394					7,398	
TAS						106	214			320						320	
VIC	808	1,943	4,182	8,779	25	5,374	2,334	2,032	616	26,093	3,166	684	7,560			33,348	
WA	9	192	930	4,361		4,853	8,268	1,798		20,411	2,320					24,629	
Total	1,345	5,760	14,203	44,755	463	31,591	28,632	11,935	3,738	142,422	13,340	2,680	18,072	1,000	250	170,677	

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2012 to date = 5,358,291 5.5kg tray eqv

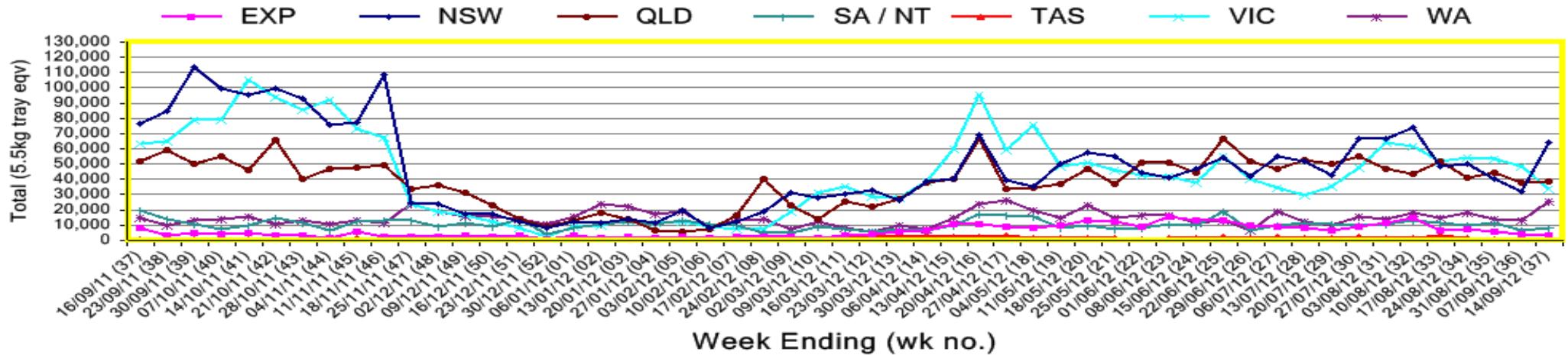


Percentage dispatched by region (Based on seasonal forecast - 2012)

■ 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 = 5,358,291 5.5kg tray eqv



Week 37 contributors - Packhouses

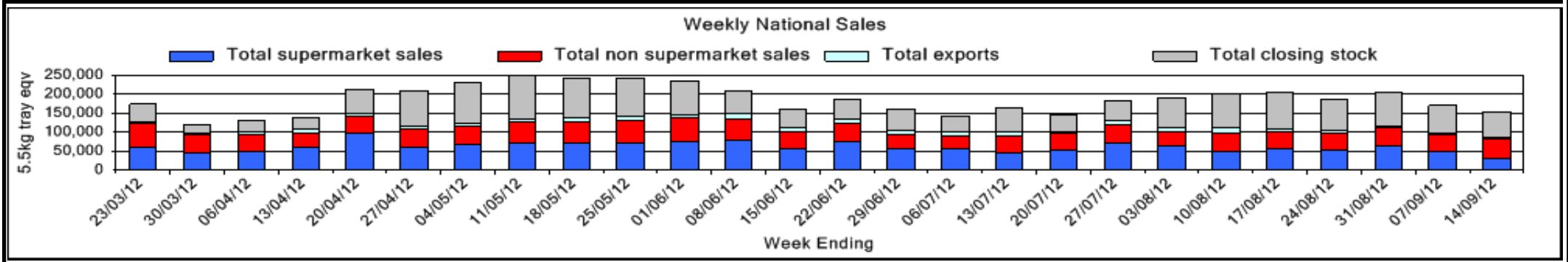
- Avocado Industry Council (NZAGA)
- Avowest
- C F Fechner
- Chinoola Orchards
- Chislett Developments Pty Ltd
- Coastal Avocados
- Delroy Orchards
- Green Pear Avocado
- I & A Tolson
- KV & JM Lehmann
- Midcoast Avocados
- Natures Fruit Company
- One Harvest
- Sunfresh
- Sunnyspot Packhouse Pty Ltd
- The Avocado Grove
- Touchwood Farming
- Vitor Marketing Pty Ltd
- Wodonga Park Fruit and Nuts

Week 37 contributors - Wholesalers

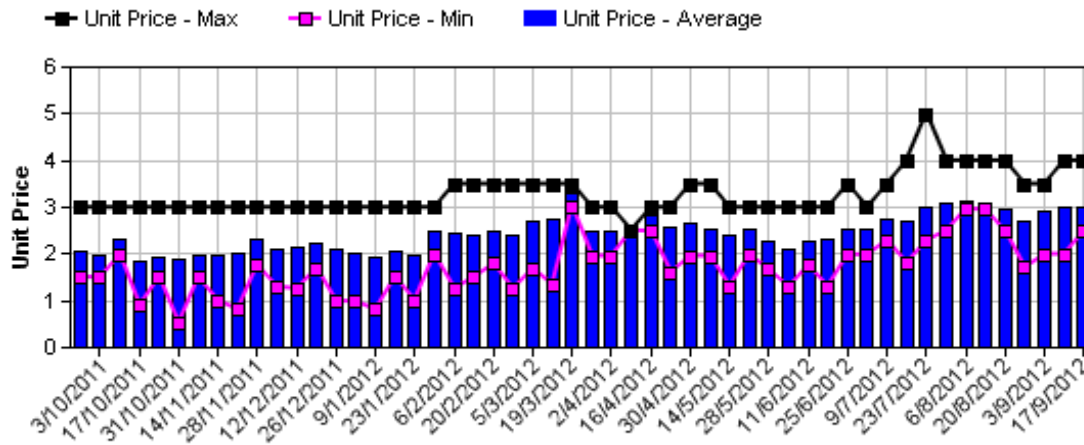
- Allcrops Pty Ltd (Sydney)
- C & S Ponte Produce Pty Ltd (Melbourne)
- Costa Farms (Adelaide)
- Costa Farms (Brisbane)
- Costa Farms (Perth)
- Dykes Bros (Melbourne)
- Etherington (Perth)
- Exotic Fruit Traders (Sydney)
- Fresh Choice WA Pty Ltd (Perth)
- United Fresh (Adelaide)
- Fresh Express Produce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

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

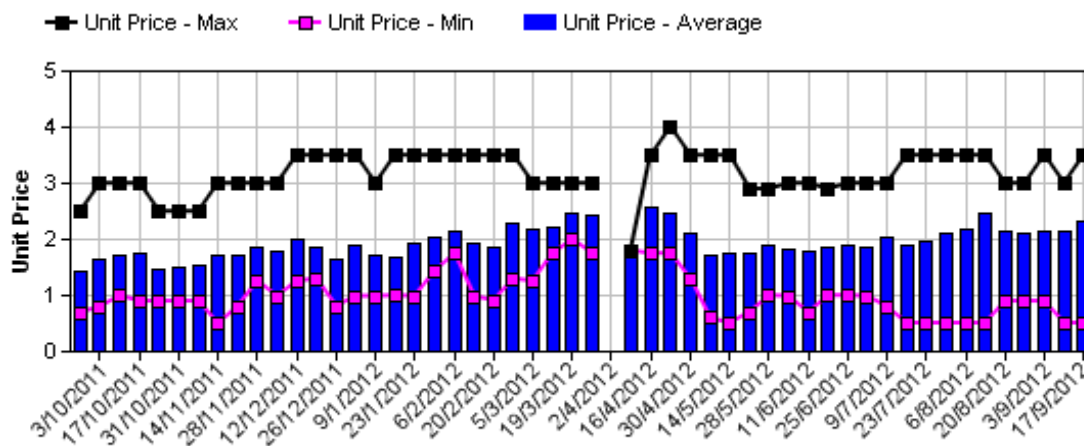
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	6,671		895	7,566											6,671		895	7,566
Total non supermarket sales	7,350			7,350	1,688		44	1,732	3,149						10,419		80	10,499
Total exports																		
Total sales	14,021		895	14,916	1,688		44	1,732	3,149					17,090		975	18,065	
Total Stock on Hand	2,958			2,958	120			120	218					3,176				3,176
QLD																		
Total supermarket sales	10,920			10,920	701			701	1,275	880			880	160	12,355			12,355
Total non supermarket sales	15,297		325	15,622	607		166	773	1,405						16,401		627	17,027
Total exports	1,117			1,117	220			220	400						1,517			1,517
Total sales	27,334		325	27,659	1,528		166	1,694	3,080	880			880	160	30,273		627	30,899
Total Stock on Hand	26,303		216	26,519	828		45	873	1,587						27,808		298	28,106
SA & TAS																		
Total supermarket sales	6,215			6,215			115	115	209						6,215		209	6,424
Total non supermarket sales	5,123		28	5,151	1,271		170	1,441	2,620						7,434		337	7,771
Total exports																		
Total sales	11,338		28	11,366	1,271		285	1,556	2,829						13,649		546	14,195
Total Stock on Hand	16,177			16,177	2,164		31	2,195	3,991						20,112		56	20,168
VIC																		
Total supermarket sales	1,720		633	2,353											1,720		633	2,353
Total non supermarket sales	9,661		582	10,242	1,743		18	1,761	3,202	312			312	57	12,886		614	13,501
Total exports																		
Total sales	11,381		1,215	12,596	1,743		18	1,761	3,202	312			312	57	14,607		1,247	15,854
Total Stock on Hand	5,374		815	6,189	2,357		54	2,411	4,384	314			314	57	9,717		913	10,630
WA																		
Total supermarket sales	1,152			1,152											1,152			1,152
Total non supermarket sales	3,380		11	3,391	1,243			1,243	2,260						5,640		11	5,651
Total exports	720			720	440			440	800						1,520			1,520
Total sales	5,252		11	5,263	1,683			1,683	3,060						8,312		11	8,323
Total Stock on Hand	5,178			5,178	95			95	173						5,351			5,351
Total																		
Total supermarket sales	26,679		1,528	28,207	701		115	816	1,484	880			880	160	28,113		1,737	29,850
Total non supermarket sales	40,811		946	41,756	6,552		398	6,950	12,636	312			312	57	52,780		1,669	54,449
Total exports	1,837			1,837	660			660	1,200						3,037			3,037
Total sales	69,326		2,474	71,800	7,913		513	8,426	15,320	1,192			1,192	217	83,930		3,406	87,337
Total Stock on Hand	55,990		1,031	57,021	5,564		130	5,694	10,353	314			314	57	66,163		1,268	67,431



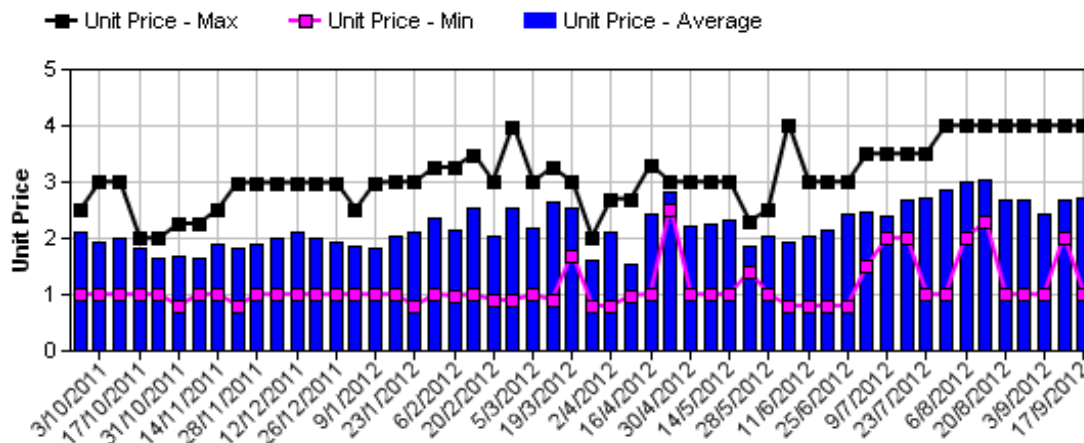
Hass Avocado Average Retail Prices - Sydney



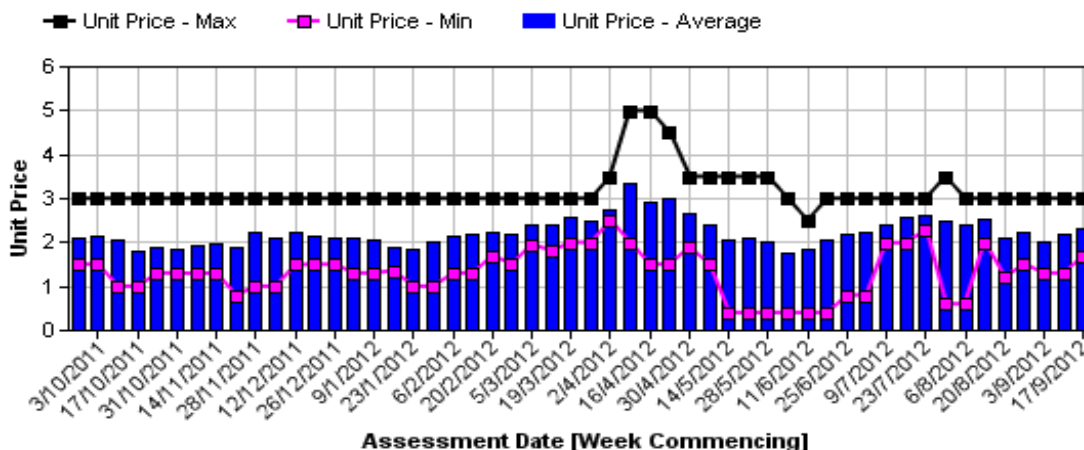
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

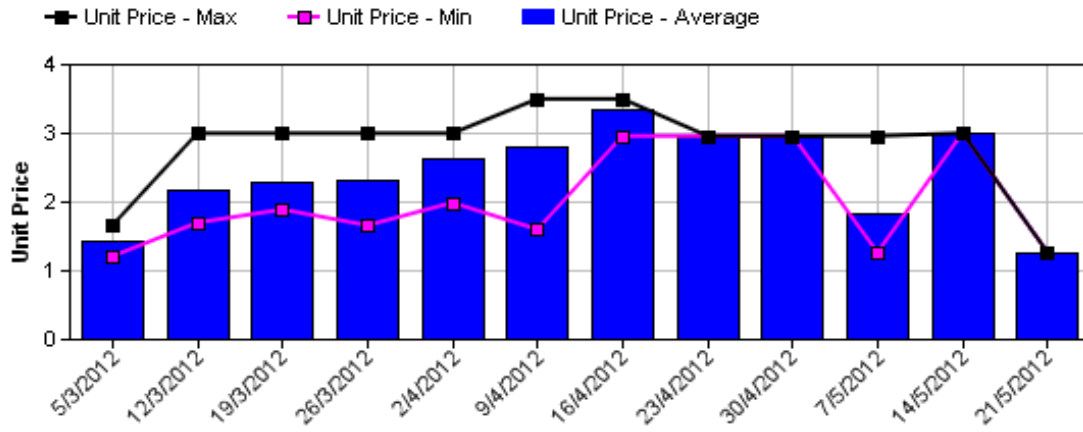


Hass Avocado Average Retail Prices - Perth

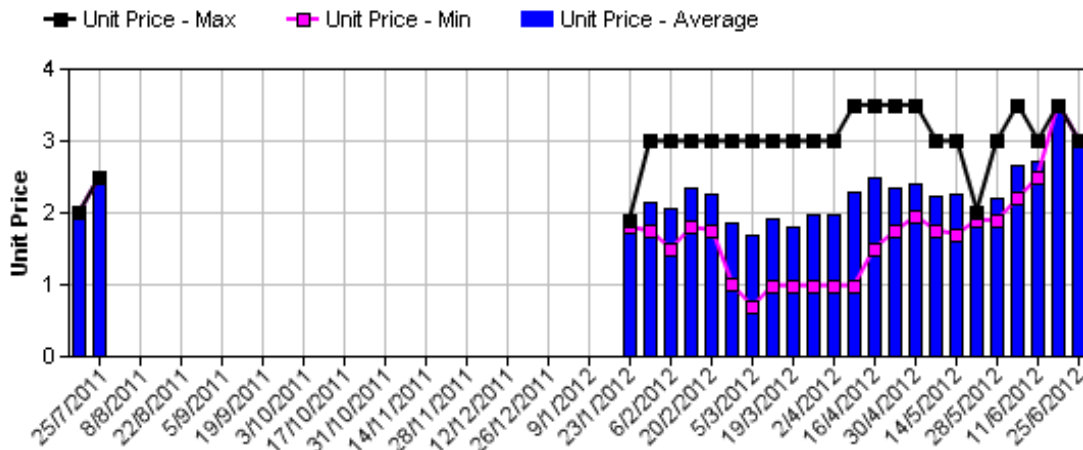


Assessment Date [Week Commencing]

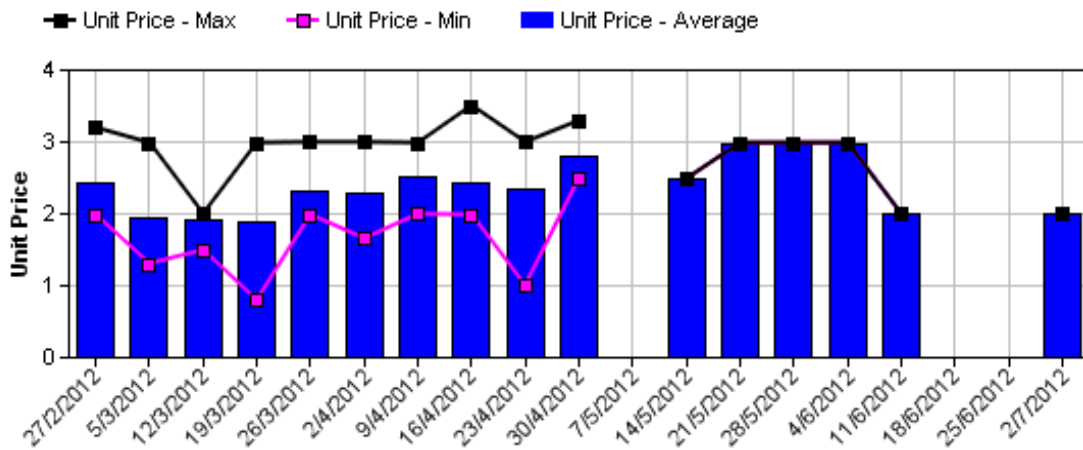
Shepard Avocado Average Retail Prices - Sydney



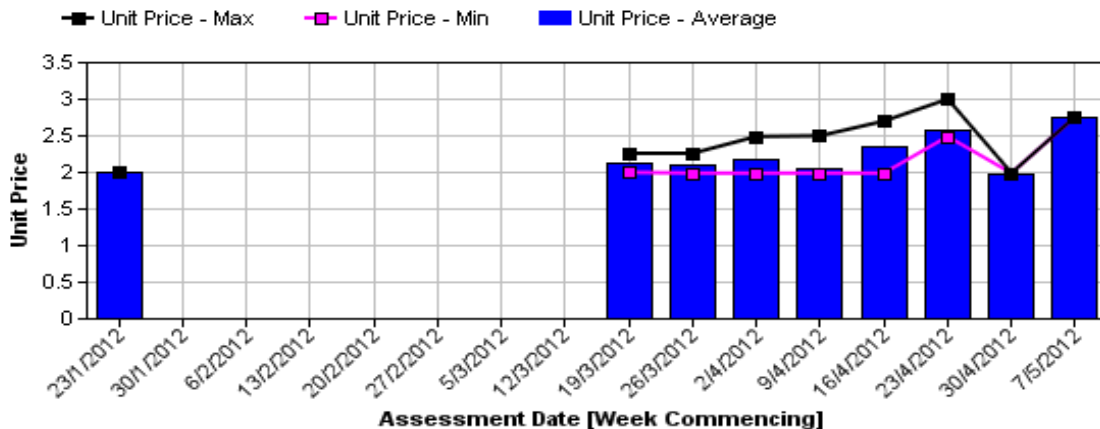
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Retail Prices by City, Store and Variety - 17th September 2012

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
Woolworths	Hass	265	2.48	No	Aus	I	Hass	225	0.99	No	Aus
Woolworths	Hass	270	2.48	No	Aus	IS	Hass	280	1.99	Store	Aus
Coles	Hass	260	2.48	No	Aus	I	Hass	260	1.99	No	Aus
Coles	Hass	250	2.48	No	Aus	I	Hass	244	1.99	No	Aus
Coles	Hass	275	2.48	No	Aus	Coles	Hass	290	2.48	No	Aus
IGA	Hass	315	2.95	No	Aus	Coles	Hass	255	2.48	No	Aus
Woolworths	Hass	260	2.98	Store	Aus	Safeway	Hass	275	2.98	No	Aus
I	Hass	270	2.99	No	Aus	Safeway	Hass	260	2.98	No	Aus
I	Hass	250	2.99	No	Aus	Coles	Hass	300	2.98	No	Aus
IGA	Hass	230	2.99	No	Aus	Safeway	Hass	240	2.98	No	Aus
I	Reed	405	2.99	No	Aus	I	Hass	290	2.99	No	Aus
Foodworks	Hass	260	2.99	No	Mixed	I	Hass	280	2.99	No	Aus
I	Reed	440	2.99	Store	Aus	IGA	Hass	270	2.99	No	Aus
I	Hass	260	2.99	No	Aus	I	Hass	310	3.98	No	Aus
I	Hass	310	3.49	No	Aus	I	Hass	275	3.99	No	Aus
I	Hass	320	3.49	No	Mixed	PERTH					
I	Hass	310	3.99	No	Mixed	IGA	Hass	190	1.69	Cat	Aus
I	Hass	330	3.99	No	Aus	IGA	Hass	195	1.69	Cat	Aus
BRISBANE						IGA	Hass	245	1.69	Cat	Aus
I	Hass	100	0.50	Store	Aus	IGA	Hass	230	1.69	Store	Aus
IGA	Hass	240	1.49	No	Aus	IS	Hass	205	1.79	Store	Aus
I	Hass	220	1.99	No	NZ	Coles	Hass	255	2.45	No	Aus
Woolworths	Hass	200	2.28	No	Aus	Woolworths	Hass	210	2.45	No	Aus
IGA	Hass	200	2.28	No	Aus	Woolworths	Hass	210	2.45	Store	Aus
Woolworths	Hass	240	2.28	No	Aus	Woolworths	Hass	215	2.48	No	Aus
IGA	Hass	220	2.28	No	Aus	Coles	Hass	215	2.48	No	Aus
Woolworths	Hass	200	2.28	No	Aus	I	Hass	230	2.50	No	Aus
Coles	Hass	210	2.48	No	Aus	I	Hass	265	2.99	No	Aus
Coles	Hass	200	2.48	No	Aus	I	Hass	270	2.99	No	Aus
Coles	Hass	240	2.48	No	Aus	I	Hass	250	2.99	No	Aus
I	Hass	280	2.50	Store	Aus						
I	Hass	305	2.99	No	Aus						
I	Hass	345	2.99	Store	Aus						
I	Fuerte	400	2.99	No	Aus						
I	Fuerte	315	2.99	No	Aus						
I	Hass	308	3.49	Store	Aus						
I	Wurtz	322	3.49	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

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

Store Codes

I = Independent Fruit and Vegetable stores
IC = Independent Fruit and Vegetable store Chains
IS = Independent Supermarkets