



INFOCADO WEEKLY REPORT: 7 — 13 September 2013 (Wk 37)



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Comments

- The next Quarterly Report is due out next month. Your seasonal forecast forms have been emailed to you already so please take the time to review and submit these by the end of the month.
- Retail prices on average are steady. No catalogue specials are in place this week however there are a number of store specials running in Brisbane. No New Zealand fruit was spotted in stores this week but there a number of displays where no country of origin was listed.
- Over the last few weeks volumes have been between 10% and 20% higher than they were at the same time last year. Interestingly average retail prices in Sydney over the same period have been around 10% higher also.
- New Zealand dispatch data has been updated on page 3 of the report. There are no changes to the forecast at this point in time.
- Packers are reminded to update their four weekly forecast each week, including a forecast for the fourth week.
- Updates to the Infocado system will mean those businesses using Apple computers or iPads will soon be able to use these devices to enter Infocado data. If we already know you are one of these businesses we will be in touch with you and activating this option for you in the coming weeks. Please contact us if you have any questions or concerns. If we have not spoken to you about this already and you would like this capability switched on for your business please contact infocado@avocado.org.au or 07 3846 6566.

What you need to be aware of for next month

- In terms of the levy funded promotional campaign, the focus of the next 6 months will be the launch of a tactical advertising campaign targeting breakfast as a specific opportunity to grow avocado usage. This was identified in the market research as an opportunity for growth particularly with consumers classified through the segmentation analysis as Avocado Lovers and Enthusiasts. This campaign will encourage Avocado Lovers to include avocados for breakfast (more often) during the week, which is about reinforcing and extending existing behaviour, rather than trying to change behaviour. During August the breakfast campaign will be started via social media and the Australian Avocado website.
- The July 2013 Quarterly Report forecasts a total of 722,881 5.5kg eqv trays in the market place for October with 715,315 5.5kg eqv trays being Hass.

Upcoming Holidays

WA Queen's Birthday: 30 September | QLD, NSW & SA Labour Day: 7 October | VIC Melbourne Cup Day: 5 November

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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:

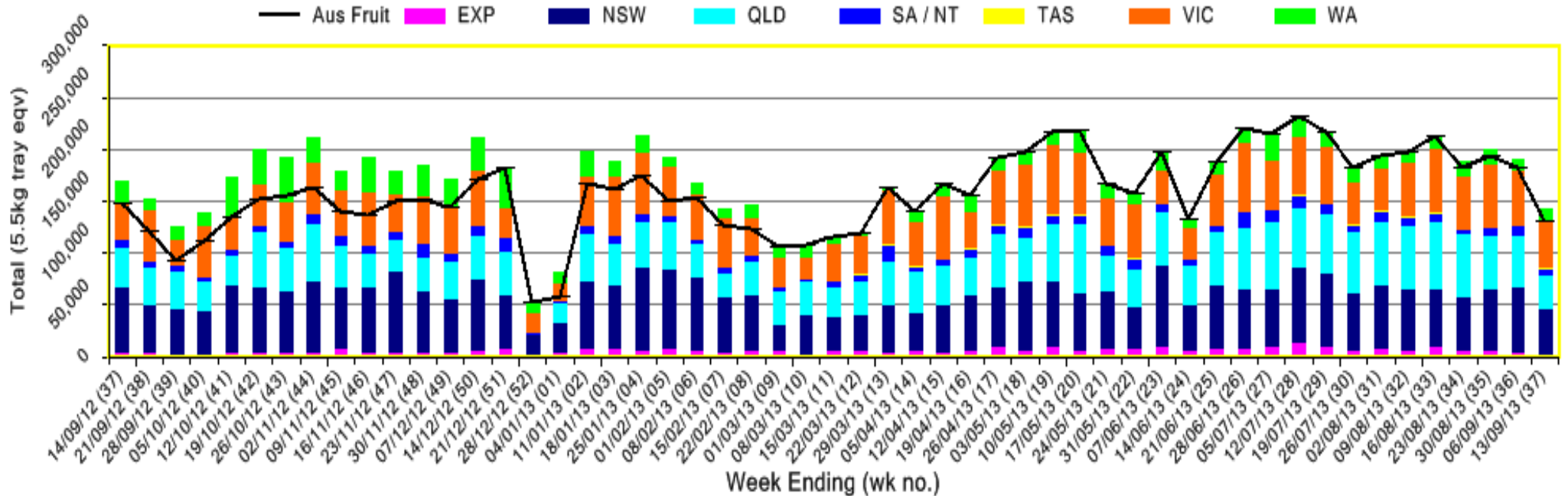
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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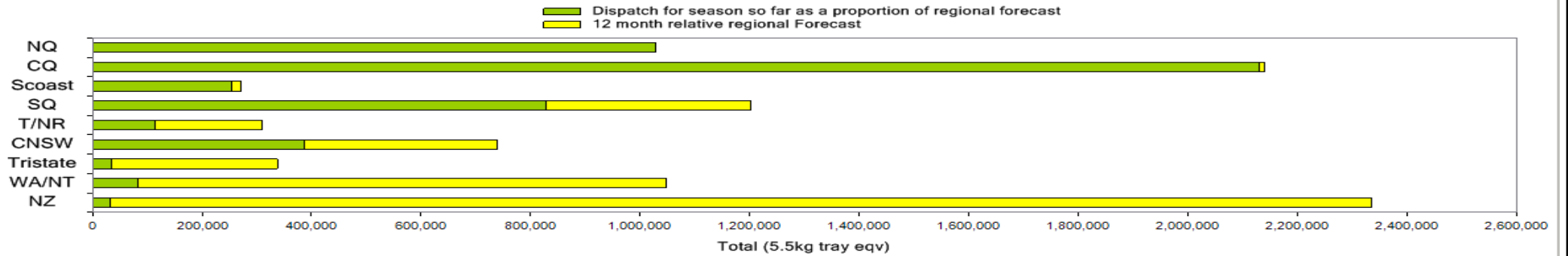
Industry Dispatches By Destination State and Count Size : 7th September - 13th September 2013 (Wk 37)

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	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP								92	1,380	1,472	312				2,039
NSW	254	1,144	4,298	10,551	2,208	5,572	4,635	2,706	1,181	32,549	6,109	2,028		750	44,161
QLD	9	346	1,949	3,870	1,564	5,061	5,712	3,360	1,335	23,206	3,139	4,320	9,980		31,513
SA / NT		2	545	683		1,217	1,051	2,164	42	5,704	669	480			7,007
TAS							480			480					480
VIC	44	842	3,850	8,451	5,495	8,780	5,199	2,881	1,453	36,995	4,897	1,806			46,227
WA	46	62	276	1,078	1,125	1,092	5,350	377		9,406	912				11,064
Total	353	2,396	10,918	24,633	10,392	21,722	22,427	11,580	5,391	109,812	16,038	8,634	9,980	750	142,493

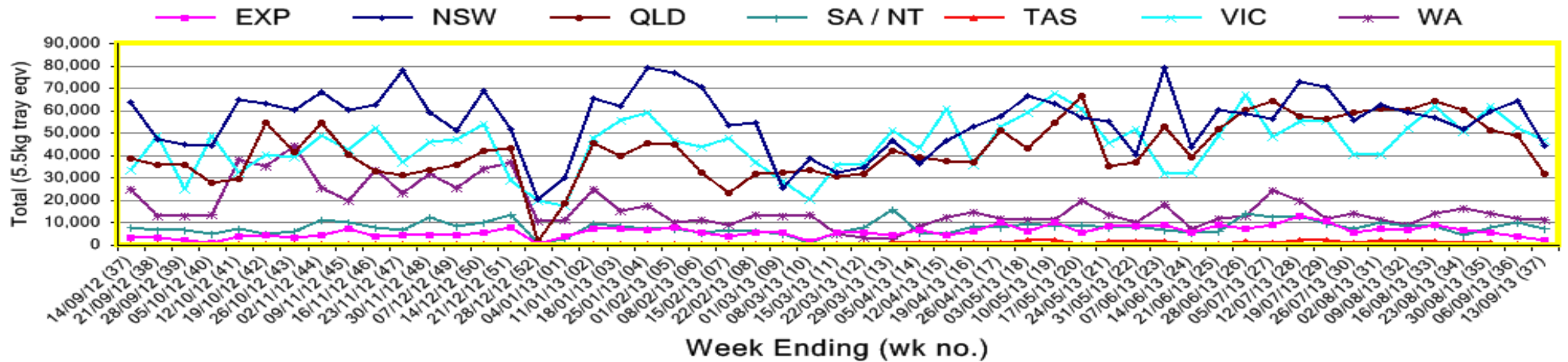
Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 6,447,547 5.5kg tray eqv



Percentage dispatched by region (Based on seasonal forecast - 2013)



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 6,447,547 5.5kg tray eqv



Week 37 contributors - Packhouses

- Avocado Industry Council (NZAGA)
- Balmoral Orchard (SQ)
- Green Nugget Orchards (SQ)
- Mountain Fresh (SQ)
- One Harvest (SQ)
- Sunnyspot Packhouse Pty Ltd (SQ, SC)
- The Avolution (SQ, TRI)
- Touchwood Farming (SQ)
- Wodonga Park Fruit and Nuts (SQ)
- G & C Christensen (SC)
- Natures Fruit Company (SC)
- Sunfresh (SC)
- Aussie Orchards Growers & Packers (TAM/NR)
- Jirel Holdings (TAM/NR)
- WJ Row (TAM/NR)
- Bonyaricall Vineyards (TRI)
- Chinoola Orchards (TRI)
- Chislett Developments Pty Ltd (TRI)
- Golden Hill Packing Pty Ltd (TRI)
- KV & JM Lehmann (TRI)
- Simfresh Pty Ltd (TRI)
- Avowest (WA)
- Delroy Orchards (WA)
- Green Pear Avocado (WA)
- CNSW & CQ**
- Less than 3 packhouse contributors

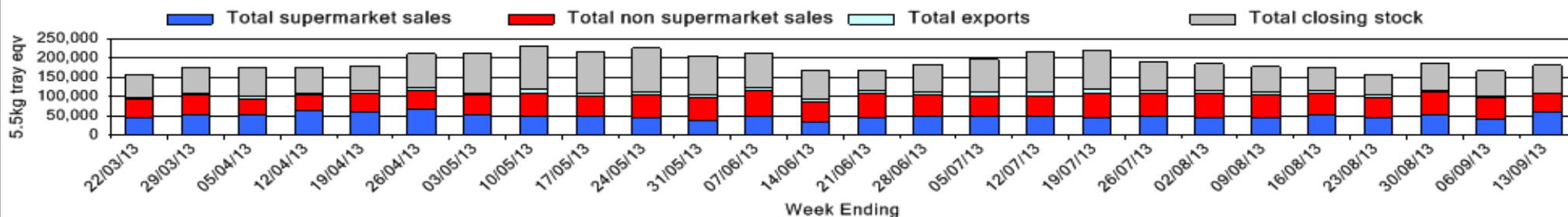
Week 37 contributors - Wholesalers

- Allcrops Pty Ltd (Sydney)
- Costa Farms (Adelaide)
- Costa Farms (Brisbane)
- Costa Farms (Perth)
- Dykes Bros (Melbourne)
- Etherington (Perth)
- Exotic Fruit Traders (Sydney)
- Favco Fruit & Vegetable Company (Brisbane)
- Fresh Choice WA Pty Ltd (Perth)
- Murray Bros (Brisbane)
- Premier Fruits Pty Ltd (Melbourne)
- 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)
- United Fresh (Adelaide)

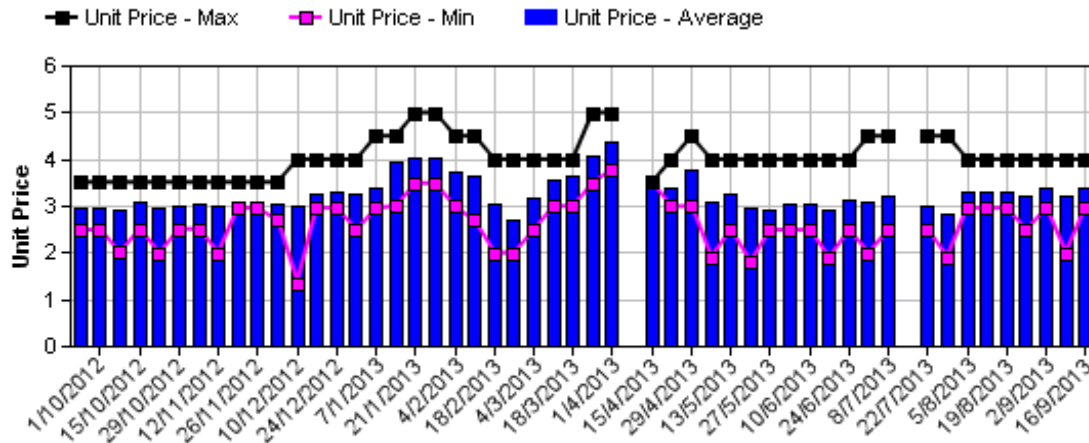
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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	14,345			14,345	502			502	913	1,920			1,920	349	15,607			15,607
Total non supermarket sales	5,309			5,309	1,699		180	1,879	3,416						8,398		327	8,726
Total exports																		
Total sales	19,654			19,654	2,201		180	2,381	4,329	1,920			1,920	349	24,005		327	24,333
Total Stock on Hand	1,275			1,275	1,104			1,104	2,007						3,282			3,282
QLD																		
Total supermarket sales	10,645		635	11,280						4,320			4,320	785	11,430		635	12,065
Total non supermarket sales	18,104		559	18,663	1,661			1,661	3,020						21,124		559	21,683
Total exports	1,351		121	1,472	312			312	567						1,918		121	2,039
Total sales	30,100		1,315	31,415	1,973			1,973	3,587	4,320			4,320	785	34,473		1,315	35,788
Total Stock on Hand	21,147		336	21,483	1,373		96	1,469	2,671						23,643		511	24,154
SA & TAS																		
Total supermarket sales	8,976		320	9,296						480			480	87	9,063		320	9,383
Total non supermarket sales	2,341		69	2,410	1,028		4	1,032	1,876						4,210		76	4,286
Total exports																		
Total sales	11,317		389	11,706	1,028		4	1,032	1,876	480			480	87	13,273		396	13,670
Total Stock on Hand	19,043		7	19,050	1,137		9	1,146	2,084						21,110		23	21,134
VIC																		
Total supermarket sales	14,871		303	15,174						1,440			1,440	262	15,133		303	15,436
Total non supermarket sales	6,046		982	7,028	1,024		108	1,132	2,058	132			132	24	7,931		1,179	9,110
Total exports																		
Total sales	20,917		1,285	22,202	1,024		108	1,132	2,058	1,572			1,572	286	23,064		1,482	24,546
Total Stock on Hand	11,160		2,894	14,054	1,153		276	1,429	2,598	220			220	40	13,296		3,396	16,692
WA																		
Total supermarket sales	6,373			6,373	452			452	822						7,195			7,195
Total non supermarket sales	3,694			3,694	534			534	971						4,665			4,665
Total exports																		
Total sales	10,067			10,067	986			986	1,793						11,860			11,860
Total Stock on Hand	6,035			6,035	379			379	689						6,724			6,724
Total																		
Total supermarket sales	55,210		1,258	56,468	954			954	1,735	8,160			8,160	1,484	58,428		1,258	59,686
Total non supermarket sales	35,494		1,610	37,104	5,946		292	6,238	11,342	132			132	24	46,329		2,141	48,470
Total exports	1,351		121	1,472	312			312	567						1,918		121	2,039
Total sales	92,055		2,989	95,044	7,212		292	7,504	13,644	8,292			8,292	1,508	106,675		3,520	110,196
Total Stock on Hand	58,660		3,237	61,897	5,146		381	5,527	10,049	220			220	40	68,056		3,930	71,986

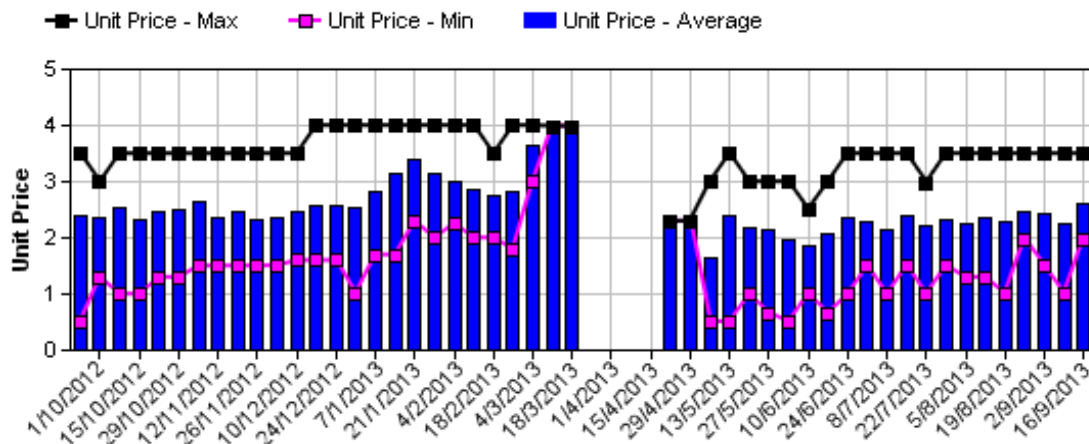
Weekly National Sales



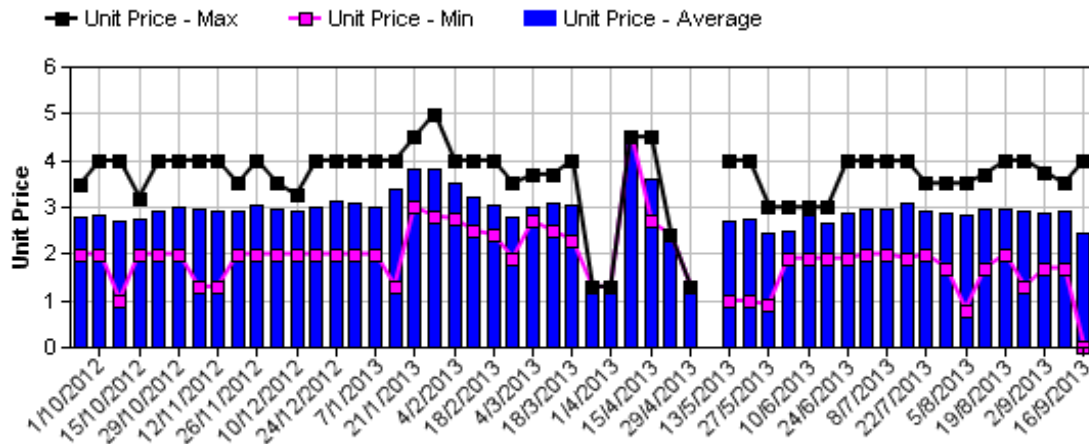
Hass Avocado Average Retail Prices - Sydney



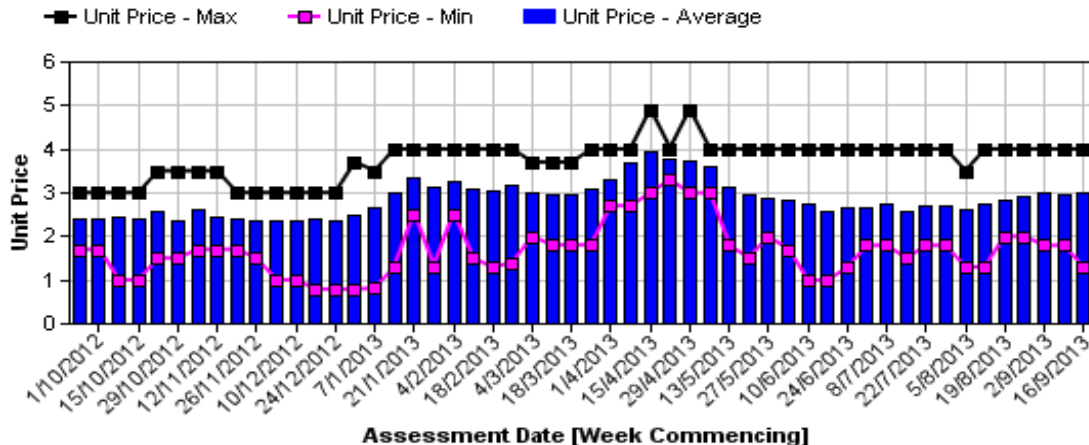
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

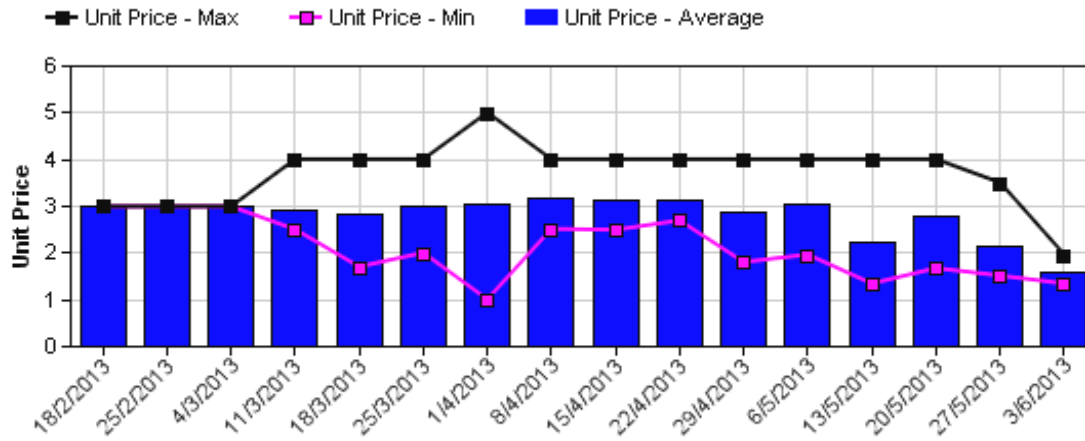


Hass Avocado Average Retail Prices - Perth

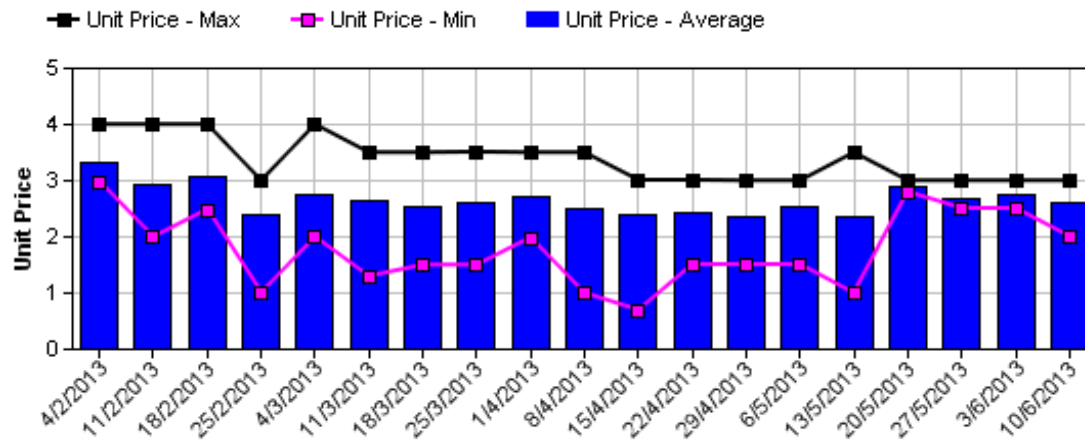


Assessment Date [Week Commencing]

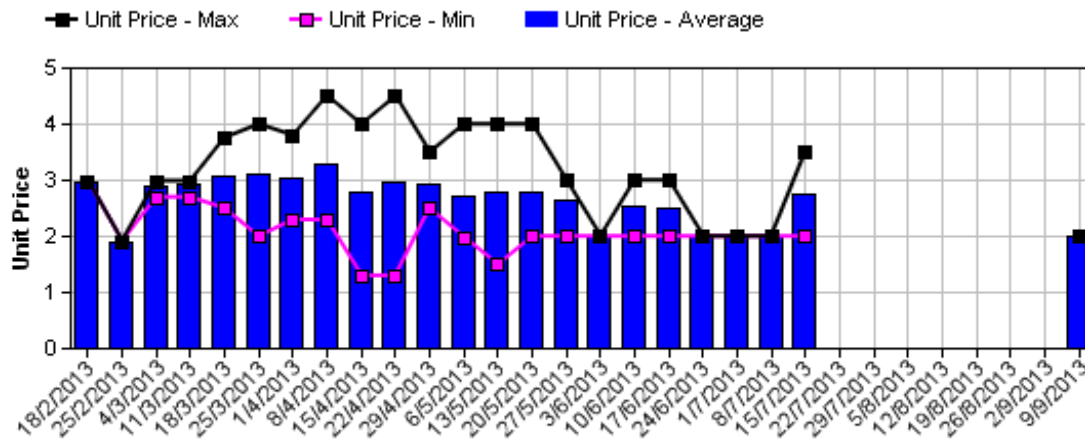
Shepard Avocado Average Retail Prices - Sydney



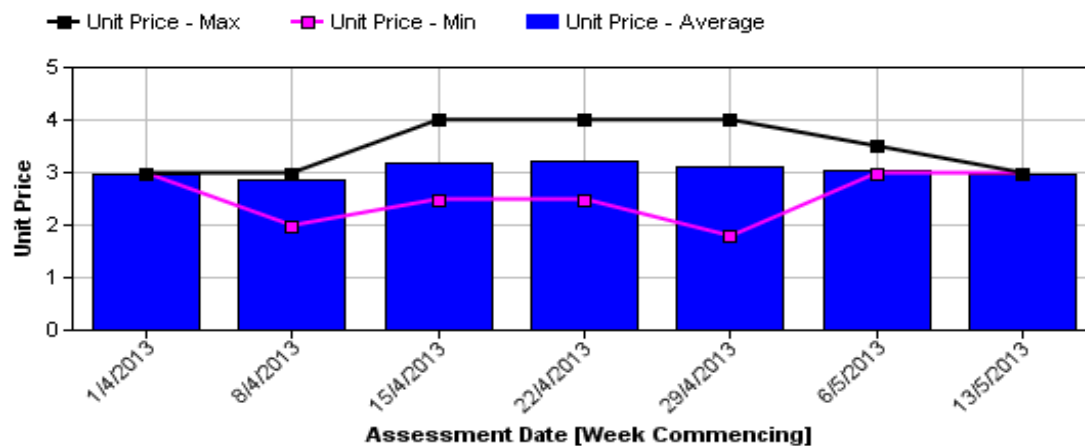
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment Date [Week Commencing]

Retail Prices by City, Store and Variety – 16 September 2013

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
IGA	Hass	280	2.95	No	Aus
Woolworths	Hass	270	2.98	No	Aus
Woolworths	Hass	280	2.98	No	Aus
Woolworths	Hass	270	2.98	No	Aus
Coles	Hass	270	2.98	No	Aus
Coles	Hass	300	2.98	No	Aus
I	Hass	280	2.99	No	Aus
I	Reed	390	2.99	No	Aus
I	Hass	280	2.99	No	Aus
I	Hass	250	3.49	No	Aus
Foodworks	Hass	300	3.49	No	Aus
I	Hass	320	3.99	No	Aus
IGA	Hass	260	3.99	No	Aus
I	Hass	290	3.99	No	Aus
I	Hass	290	3.99	No	Aus
I	Hass	300	3.99	No	Aus
BRISBANE					
IGA	Hass	200	1.49	Store	Aus
I	Hass	190	1.50	Store	Aus
Woolworths	Reed	300	1.98	No	Aus
Woolworths	Hass	180	1.98	No	Aus
I	Hass	300	1.99	No	Aus
IGA	Hass	190	1.99	Store	Aus
IGA	Hass	218	2.48	No	Aus
Coles	Hass	210	2.48	No	Aus
Coles	Hass	220	2.48	Store	Aus
Woolworths	Hass	340	2.74	No	Aus
Woolworths	Reed	340	2.74	No	Aus
Woolworths	Hass	280	2.74	No	Aus
I	Hass	280	2.79	Store	Aus
I	Wurtz	280	2.99	No	Aus
I	Hass	265	3.00	Store	Aus
I	Hass	200	3.00	Store	Aus
I	Hass	260	3.49	Store	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
Coles	Hass	190	1.90	No	Aus
I	Hass	240	1.99	Store	NS
I	Wurtz	250	1.99	No	NS
I	Hass	255	1.99	No	NS
I	Hass	226	1.99	No	Aus
Coles	Hass	290	2.48	No	Aus
Coles	Hass	220	2.48	No	Aus
Safeway	Hass	250	2.48	No	Aus
Safeway	Hass	265	2.48	No	Aus
I	Hass	260	2.69	No	NS
Safeway	Hass	280	2.98	No	Aus
IS	Hass	245	2.99	No	Aus
IGA	Hass	265	2.99	No	Aus
I	Hass	255	3.50	No	NS
I	Hass	275	3.98	No	Aus
PERTH					
I	Hass	135	1.28	No	Aus
IS	Hass	190	1.69	Store	Aus
I	Wurtz	180	1.98	No	Aus
Coles	Hass	240	2.98	No	Aus
Woolworths	Hass	210	2.98	No	Aus
Woolworths	Hass	220	2.98	Store	Aus
Coles	Hass	240	2.98	No	Aus
Woolworths	Hass	220	2.98	No	Aus
Coles	Hass	215	2.98	No	Aus
I	Hass	230	2.99	No	Aus
I	Hass	275	2.99	No	Aus
I	Hass	295	2.99	No	Aus
IGA	Hass	240	2.99	No	Aus
IGA	Hass	290	3.49	No	Aus
IGA	Hass	295	3.49	No	Aus
IGA	Hass	265	3.99	No	Aus
I	Hass	270	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