



INFOCADO WEEKLY REPORT: 12th — 18th Sept 2015 (Week 38)

Comments

- The weekly dispatch volume (254,025 trays) was slightly higher than the weeks forecast by about 20,000 trays(9%) (refer P 2 & 3).
- The largest volume of dispatches originated from Western Australia (91,372 trays). The Sydney market received the highest volume again (79,768 trays), size 20 fruit continues to dominate total supplies (refer P 3).
- Average retail price for Hass continues to hold steady across all major cities although this does not include multi-buy offers. Highest and lowest recorded retail prices was \$3.99 / fruit in all cities \$1.78 / fruit in Brisbane and Perth (refer P 6 - 8).
- All packhouses and consolidators are reminded to update their **15 month Seasonal Forecast forms** when available. The 15mth forecast is important as AAL uses this data to lock in the pre-harvest forecast before each region commences harvest (as now shown on P 4).
- All regions starting harvest are encouraged to carefully monitor fruit maturity, to ensure consumer satisfaction which drives future purchases.

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Marketing Update: Media starts to ramp-up in September

Australian Avocados makes a comeback on TV starting Sunday 20 September. The commercials will air on Networks 9 and 10 in metro regions and on Prime and NBN in regional areas. The programming was based on environments which appealed to food enthusiasts and food lovers.

The avocado commercials will air in some prime-time programming such as The Block, 60 Minutes, The Biggest Loser Families and the first season of The Bachelorette Australia, to name a few.

Following the TV launch, Australian Avocados will also kick off its first ever Instagram campaign. Instagram has been selected to help convert Avocado Enthusiasts to Avocado Lovers by inspiring them to do more with avocados and try different recipes and food styling.

To launch the Instagram site, a number of celebrity chefs will populate the pages with their favourite recipes and use #loveavocados. Users can explore the imagery and will be encouraged to share their avocado recipes by using the hash tag.

For a full brief please refer to the Guacamole Enewsletter - 18 Sep 2015.

Upcoming Holidays

Queens's Birthday WA: 28th September | Labour Day NSW, QLD & SA: 5th October | Labour Day NZ: 26th October | Melbourne Cup VIC: 3rd 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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This project has been funded by Horticulture Innovation Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

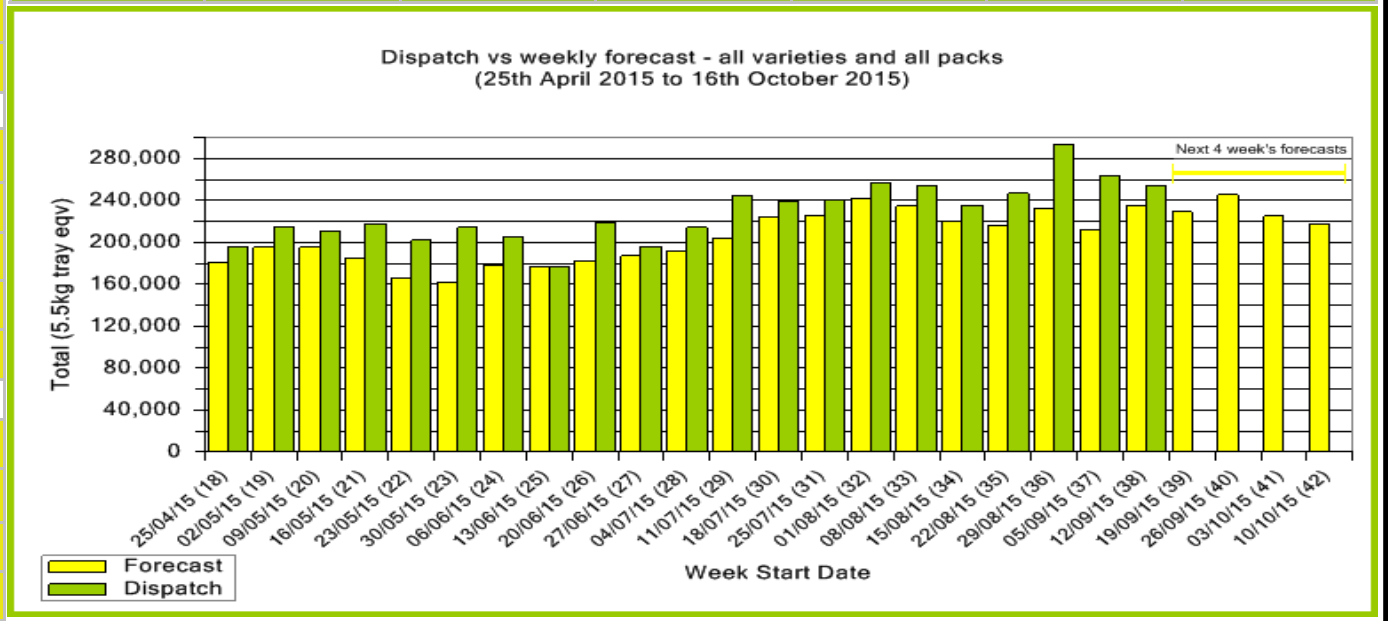
Yellow shading indicates forecast data Green shading indicates dispatch data

Forecast Data (Week 38 - 42)

Variety	Trays - Total	Bulk	P/Pk	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 38 - begin 12/09/2015						
Fuerte		40				73
Hass	201,909	13,934	11,000	8,300		230,753
Lamb Hass	450	100				632
Reed	3,333					3,333
Week Total	205,692	14,074	11,000	8,300		234,790
Week 39 - begin 19/09/2015						
Hass	198,657	12,009	11,000	8,000	1,000	224,129
Lamb Hass	500	120				718
Reed	3,333					3,333
Sharwil	700	88				860
Week Total	203,190	12,217	11,000	8,000	1,000	229,040
Week 40 - begin 26/09/2015						
Fuerte		40				73
Hass	222,325	8,854	9,000	6,900		241,314
Reed	3,333					3,333
Sharwil	700	88				860
Week Total	226,358	8,982	9,000	6,900		245,580
Week 41 - begin 03/10/2015						
Hass	203,924	8,434	8,000	6,460		221,889
Reed	3,333					3,333
Week Total	207,257	8,434	8,000	6,460		225,222
Week 42 - begin 10/10/2015						
Hass	197,730	7,626	8,000	6,000		214,141
Reed	3,333					3,333
Week Total	201,063	7,626	8,000	6,000		217,474

Dispatch Data (Week 38 - begin 12/09/2015)

Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Fuerte		40				73
Gwen	657	10				675
Hass	212,700	18,256	15,655	8,002	1,000	250,376
Reed	1,704	29				1,757
Sharwil	866	153				1,144
Total	215,927	18,488	15,655	8,002	1,000	254,025



New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) July 2015 - March 2016

Export Destination	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total to Date
NZ-Aus Pre Season Forecast	17,160	109,680	384,240	330,990	378,100	496,690	463,096	232,050	3,520	2,415,526
NZ-Aus Updated Mthly Forecast	17,160	109,680	384,240	330,990	378,100	496,690	463,096	232,050	3,520	2,415,526
Australia (from Infocado)	16,725	80,567	123,462							220,754
Australia (from ABS)	27,589	107,037								134,626
USA¹	0									0
Japan¹	0									0
Other Asia¹	3,360									3,360
Total Dispatch (Infocado + 1)	20,085	80,567	123,462	0	0	0	0	0	0	224,114

1 Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port. 2

Industry Dispatches By Origin Region and Count Size : 12th September - 18th September 2015 (Wk 38)

Origin Region	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
Central NSW		3,354	5,377	8,745		5,458	3,720	2,764		29,418	4,360	12,000	6,000		40,618
New Zealand		2,325	4,203	9,029		7,867	10,281	5,275	5,723	44,703					44,703
South Qld	18	433	773	2,829	576	2,714	2,765	1,926	741	12,775	2,345				17,039
Sunshine Coast		7	58	203		396	396	285		1,345	677				2,576
Tamborine/ Northern Riv- ers		1,024	2,802	4,278	1,513	2,357	2,010	608	420	15,012	1,198	3,655	2,000	1,000	18,401
Tri State	693	925	3,959	8,291	1,042	8,210	5,820	2,416	421	31,777	4,147		2		39,317
WA/NT	112	1,147	6,563	24,515		23,140	15,861	8,599	960	80,897	5,761				91,372
Total	823	9,215	23,735	57,890	3,131	50,142	40,853	21,873	8,265	215,927	18,488	15,655	8,002	1,000	254,025

Origin of Avocado



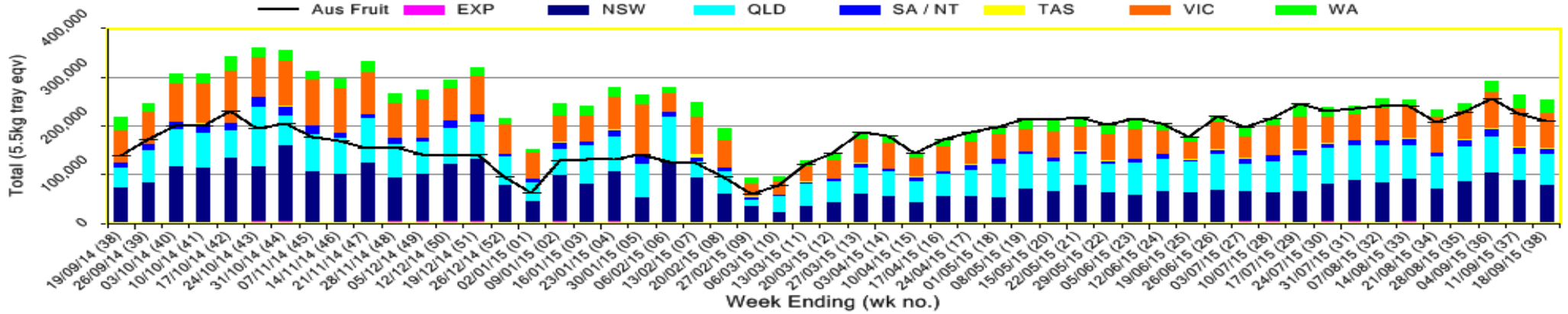
Destination of Avocado



Industry Dispatches By Destination State and Count Size : 12th September - 18th September 2015 (Wk 38)

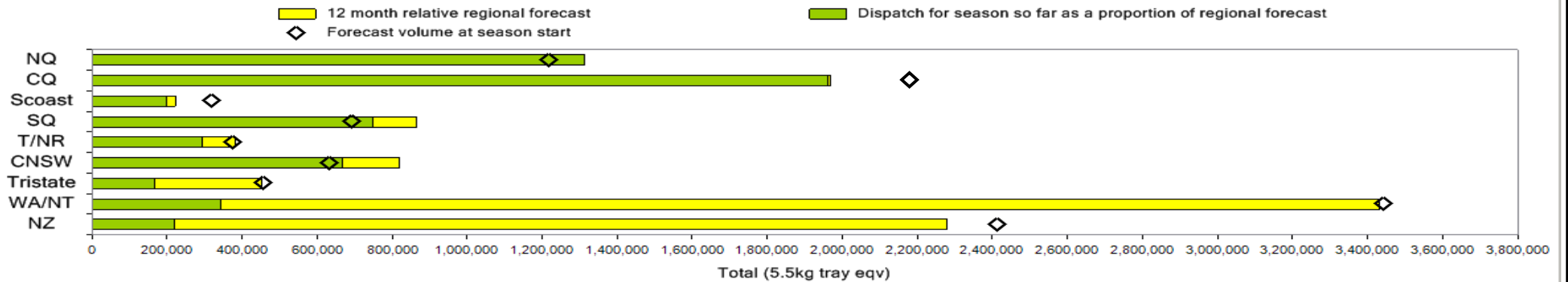
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP									320	320					320
NSW	329	3,288	9,019	21,443	800	17,704	7,471	3,873	1,382	65,309	6,126	15,260	2,000	1,000	79,768
QLD		1,663	4,495	11,939	1,397	12,779	12,199	6,391	3,223	54,086	3,268	395	6,000		61,191
SA / NT	1	32	179	566		3,953	4,087	1,763	297	10,878	697				12,145
TAS							1,032	464		1,496					1,496
VIC	448	3,636	9,132	21,128	934	11,170	10,189	3,346	2,599	62,582	5,130		2		71,909
WA	45	596	910	2,814		4,536	5,875	6,036	444	21,256	3,267				27,196
Total	823	9,215	23,735	57,890	3,131	50,142	40,853	21,873	8,265	215,927	18,488	15,655	8,002	1,000	254,025

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 8,032,519 5.5kg tray eqv



NB: The graph below utilises the seasonal forecast data (without adjustment). This can be updated monthly by contributors.

Percentage dispatched by region (Based on seasonal forecast - 2015)



Week 38 Contributors - Packhouses

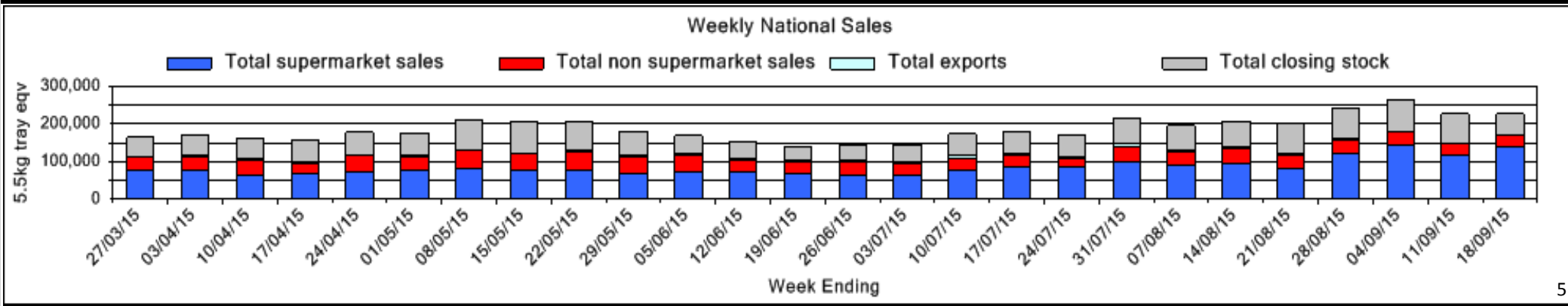
Natures Fruit Company (Consolidator)	WJ Row (TNR)
Simpson Farms Pty Ltd (Consolidator)	KV & JM Lehmann (TRI)
The Evolution (Consolidator)	Golden Hill Packing Pty Ltd (TRI)
Midcoast Avocados (CNSW)	Justin Loffler (TRI)
I & A Tolson (CNSW)	Mildura Fruit Company (TRI)
Coastal Avocados (CNSW)	Sunvale Produce Pty Ltd (TRI)
Avocado Industry Council (NZAGA)	Klingbiel Family Trust (TRI)
Green Nugget Orchards (SQ)	Marrbiz Pty Ltd (TRI)
Balmoral Orchard (SQ)	Green Pear Avocado (WA)
Wodonga Park Fruit and Nuts (SQ)	Avowest (WA)
Googa Farms (SQ)	The Avocado Grove (WA)
Coastal Avocados (TNR)	Avonova (WA)
Aussie Orchards Growers & Packers (TNR)	Delroy Orchards (WA)

Week 38 Contributors - Wholesalers

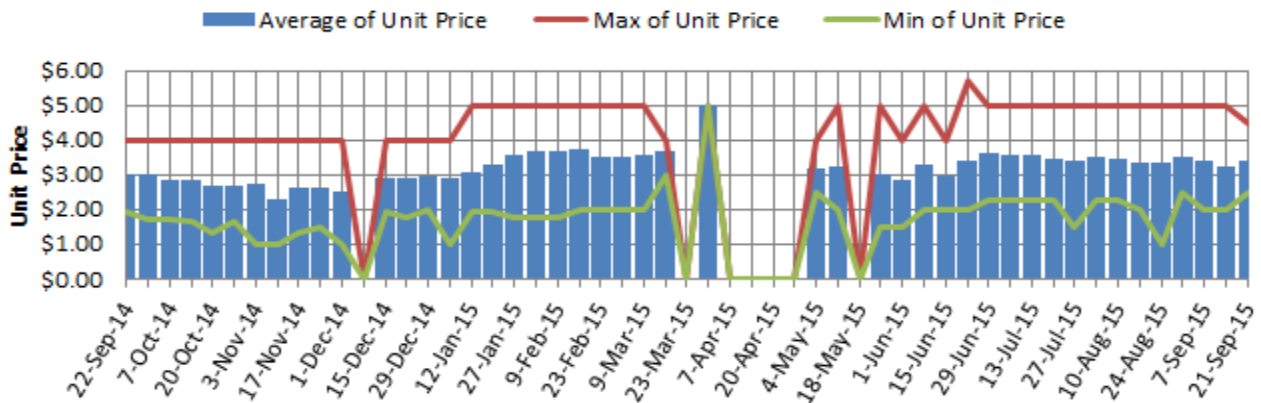
Allcrops Pty Ltd (Sydney)	Fresh Choice WA Pty Ltd (Perth)
Costa Farms (Adelaide)	Murray Bros (Brisbane)
Costa Farms (Brisbane)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Melbourne)	The La Manna Group (Adelaide)
De Luca Banana Marketing Pty Ltd (Brisbane)	The La Manna Group (Brisbane)
Dykes Bros (Melbourne)	United Fresh (Adelaide)
Etherington (Perth)	WA Farm Direct (Perth)
Exotic Fruit Traders (Sydney)	

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	36,118			36,118	1,344			1,344	2,444	14,000			14,000	2,545	41,107			41,107
Total non supermarket sales	8,695			8,695	374			374	680						9,375			9,375
Total exports	320			320											320			320
Total sales	45,133			45,133	1,718			1,718	3,124	14,000			14,000	2,545	50,802			50,802
Total Stock on Hand	2,036			2,036	20			20	36						2,072			2,072
QLD																		
Total supermarket sales	39,640			39,640	736			736	1,338	395			395	72	41,050			41,050
Total non supermarket sales	3,190		10	3,200	638			638	1,160	1,057			1,057	192	4,542		10	4,552
Total exports																		
Total sales	42,830		10	42,840	1,374			1,374	2,498	1,452			1,452	264	45,592		10	45,602
Total Stock on Hand	30,725			30,725	42			42	76						30,801			30,801
SA & TAS																		
Total supermarket sales	15,478			15,478	384			384	698						16,176			16,176
Total non supermarket sales	5,766			5,766	1,074		24	1,098	1,996						7,719		44	7,762
Total exports																		
Total sales	21,244			21,244	1,458		24	1,482	2,695						23,895		44	23,939
Total Stock on Hand	10,996			10,996	724		25	749	1,362						12,312		45	12,358
VIC																		
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	36,918			36,918	938			938	1,705						38,624			38,624
Total Stock on Hand																		
WA																		
Total supermarket sales	8,653			8,653	646			646	1,175						9,828			9,828
Total non supermarket sales	2,410			2,410	663			663	1,205						3,615			3,615
Total exports																		
Total sales	11,063			11,063	1,309			1,309	2,380						13,443			13,443
Total Stock on Hand	4,109			4,109	185			185	336						4,445			4,445
Total																		
Total supermarket sales	131,965			131,965	3,782			3,782	6,876	14,395			14,395	2,617	141,459			141,459
Total non supermarket sales	24,903		10	24,913	3,015		24	3,039	5,525	1,057			1,057	192	30,577		54	30,631
Total exports	320			320											320			320
Total sales	157,188		10	157,198	6,797		24	6,821	12,402	15,452			15,452	2,809	172,356		54	172,409
Total Stock on Hand	52,366		28	52,394	1,071		25	1,096	1,993						54,313		74	54,387



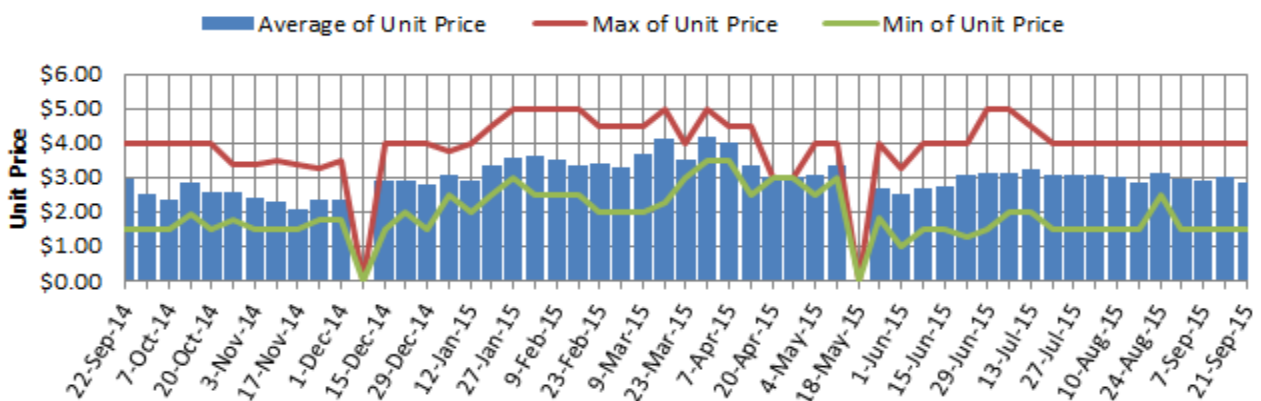
Hass Avocado Average Retail Prices - Sydney



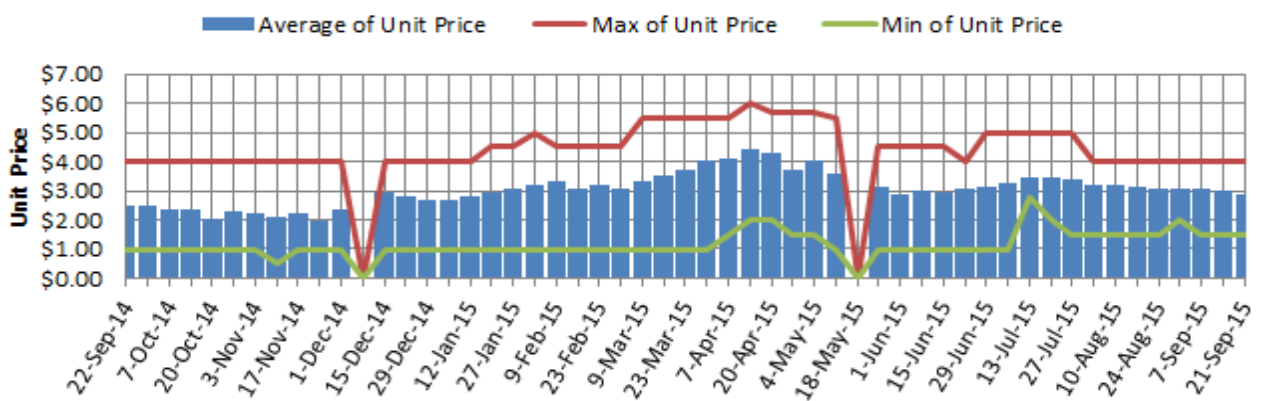
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

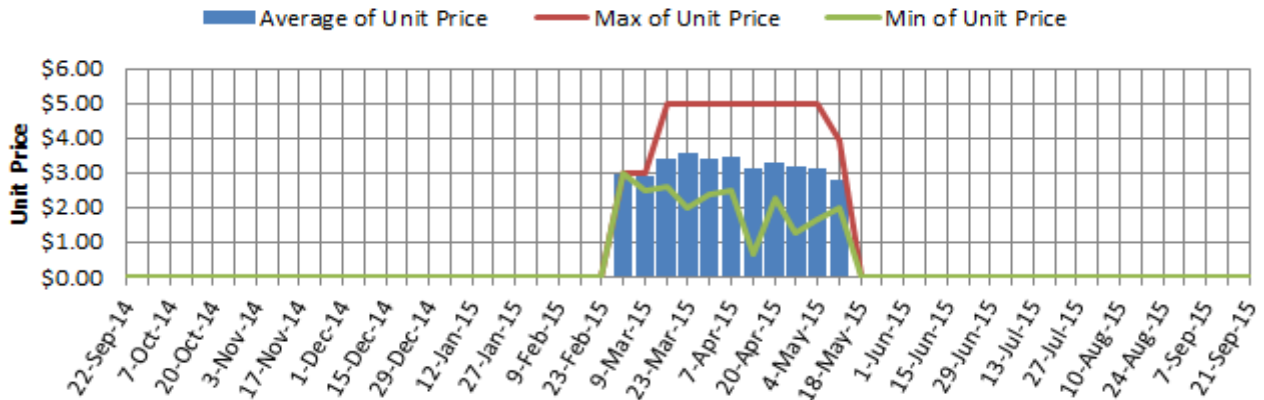


Hass Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

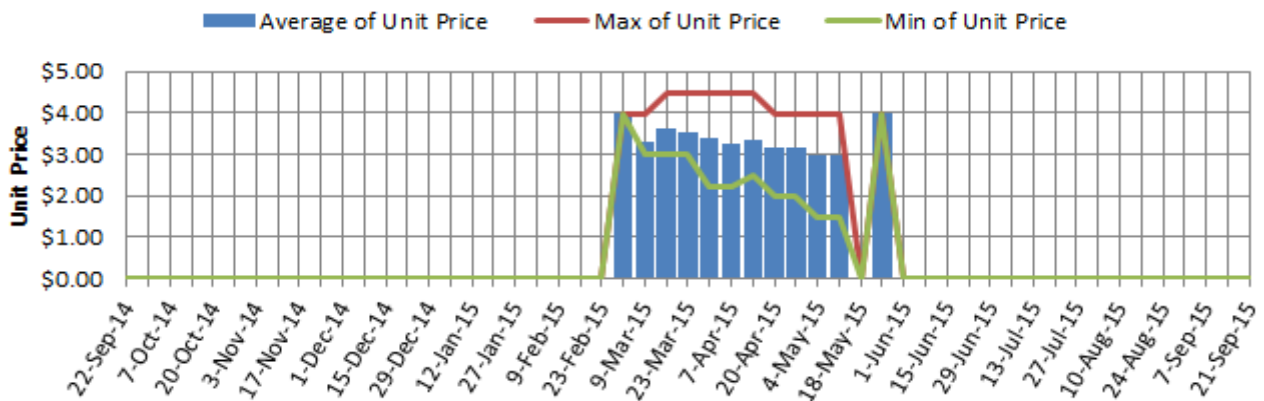
Shepard Avocado Average Retail Prices - Sydney



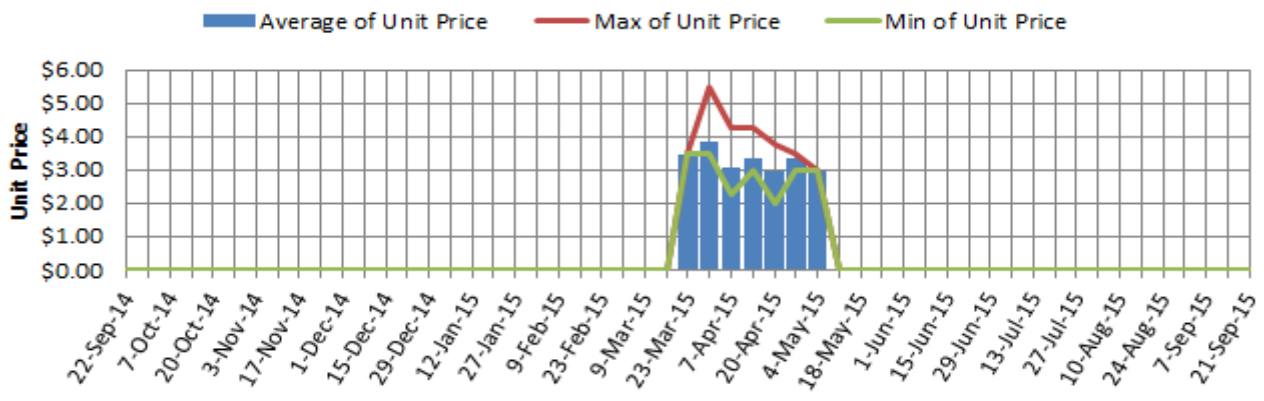
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 21st September 2015

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
IC	Hass	200	2.50	Store	Aus
Woolworths	Hass	260	2.98	No	Aus
Woolworths	Hass	260	2.98	No	Aus
Coles	Hass	270	2.98	No	Aus
Coles	Hass	250	2.98	No	Aus
IGA	Hass	220	2.98	No	Aus
Woolworths	Hass	270	2.98	No	Aus
Coles	Hass	250	2.98	No	Aus
I	Hass	260	2.99	No	Aus
IGA	Hass	250	2.99	No	Aus
I	Hass	250	2.99	No	Aus
I	Hass	270	3.49	No	Aus
Foodworks	Hass	310	3.69	Store	Aus
IC	Hass	350	3.99	No	Mixed
I	Hass	310	3.99	No	Aus
IC	Hass	340	3.99	No	Mixed
BRISBANE					
I	Hass	205	1.78	No	Aus
IGA	Hass	200	1.79	No	Aus
Woolworths	Reed	240	1.98	No	Aus
I	Hass	265	1.99	Store	Aus
Woolworths	Hass	300	1.99	Store	Aus
I	Hass	205	2.00	No	Aus
Coles	Hass	240	2.50	No	Aus
Coles	Hass	200	2.50	No	Aus
I	Reed	275	2.50	No	Aus
Coles	Hass	200	2.50	No	Aus
Woolworths	Hass	290	2.98	No	Aus
Woolworths	Hass	300	2.98	No	Aus
Woolworths	Reed	200	2.98	No	Aus
IGA	Hass	230	2.98	No	NZ
I	Hass	220	2.99	No	Aus
I	Hass	260	3.00	No	Aus
I	Hass	285	3.49	No	Aus
I	Hass	265	3.50	No	Aus
IGA	Hass	290	3.99	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
IS	Hass	270	1.99	Store	NZ
I	Hass	200	2.49	No	Aus
Coles	Hass	250	2.50	No	Aus
Woolworths	Hass	250	2.78	No	Aus
Woolworths	Hass	310	2.78	No	Aus
Woolworths	Hass	250	2.78	No	Aus
I	Hass	320	2.95	No	Aus
Coles	Hass	300	2.98	No	Aus
Coles	Hass	210	2.98	No	Aus
IGA	Hass	300	2.99	Store	NS
I	Hass	260	2.99	No	NS
I	Hass	250	3.00	No	Aus
I	Hass	240	3.69	No	Aus
I	Hass	290	3.75	No	Aus
I	Hass	300	3.98	No	Aus
I	Hass	350	3.99	No	Aus
PERTH					
I	Hass	135	1.78	No	Aus
IS	Hass	235	1.88	Store	Aus
Woolworths	Hass	190	2.50	No	Aus
Woolworths	Hass	180	2.50	No	Aus
Woolworths	Hass	180	2.50	No	Aus
I	Hass	260	2.98	No	Aus
Coles	Hass	210	2.98	No	Aus
Coles	Hass	180	2.98	No	Aus
Coles	Hass	210	2.98	No	Aus
I	Hass	250	2.99	No	Aus
IGA	Hass	190	2.99	No	Aus
I	Hass	255	2.99	No	Aus
IGA	Hass	240	3.19	No	Aus
I	Hass	280	3.29	No	Aus
IGA	Hass	270	3.99	No	Aus
IGA	Hass	290	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
 Mixed = display sign indicates fruit is from multiple origins