



# INFOCADO WEEKLY REPORT: 20th — 26th September 2014 (Wk 39)



## Comments

- The average retail price per Hass avocado continues to remain steady across all the major cities which is a good sign with industry volumes continuing to gently increase (refer page 6).
- The week's dispatches edged slightly higher than the week's forecast. The four weekly forecast continues to rise with the industry starting to see record volumes of fruit appearing through the markets as the seasonal forecasts had indicated. AAL would like to thank all industry stakeholders in providing data to Infocado (refer page 3).
- The national sales continue to increase indicating that increasing volumes are steadily moving through the markets (refer page 5).

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## New Educational POS to Build Consumer Confidence

Eradicating barriers to increased purchase remains a core strategic pillar for Australian Avocados. Many consumers still lack confidence in their ability to either choose an avocado that is at the correct stage of ripeness for their needs, or to manage the ripening of their avocados at home. Consumer research has indicated many avocado consumers would purchase more if they had specific information regarding avocado selection, ripening and handling. Not surprisingly consumers also said that in-store next to the avocado display would be their preferred location to find this information.

Therefore to capitalise on this significant opportunity new in-store and take-home point-of-sale material has been developed specifically to help consumers with their avocado experience. These include a new A3 "Avocados are Delicate" ripening poster and a new A6 sized booklet "Your Guide to Loving Your Avocado". Both the A3 ripening poster and A6 booklet are aimed at educating the consumer in a bid to minimise the incidence of damage through better selection, handling, usage and storage. It also provides healthy reasons to eat avocados.

Initial print quantities have been completed and HAL and AAL are working with retail partners and wholesalers to assist in the distribution of this material to store level. To compliment this point of sale material the "How To" section on the Australian Avocados website is also being updated to be consistent with the same information. "How to" will also feature as regular content on facebook with tips and tricks to help consumers get the most from their avocados.

For a full brief please refer to the latest Guacamole.

## 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:

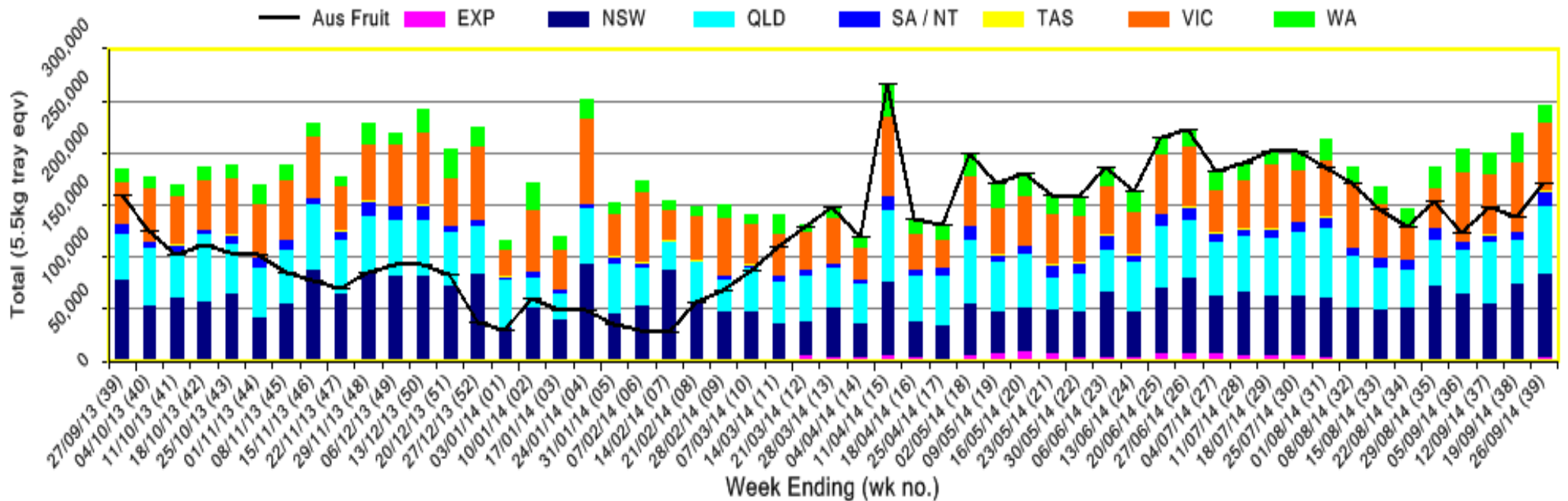
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 20th September - 26th September 2014 (Wk 39)**

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	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
EXP						88	72			1,900	923			3,578
NSW	806	3,706	6,481	26,295	101	14,005	14,709	3,726	2,911	72,740	3,636	1,440		79,613
QLD		1,761	6,316	17,092	409	14,374	12,375	6,110	4,277	62,714	1,860	780	1,140	66,445
SA / NT	160	544	2,018	2,182	2,080	866	2,705	585	107	11,247	830	660		12,876
TAS								800		800				800
VIC	244	3,047	4,213	14,026	35	15,116	13,127	4,830	2,648	57,286	4,714	120		65,879
WA		326	706	910	849	4,919	5,150	2,438		15,298	854	2,160		17,244
<b>Total</b>	<b>1,210</b>	<b>9,384</b>	<b>19,734</b>	<b>60,505</b>	<b>3,474</b>	<b>49,368</b>	<b>48,938</b>	<b>17,689</b>	<b>11,683</b>	<b>221,985</b>	<b>12,817</b>	<b>5,160</b>	<b>1,140</b>	<b>246,434</b>

**Throughput Australian & NZ avocados by destination state**  
 Throughput 1st January 2014 to date = 6,845,845 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

**Forecast Data (Week 39 - 43)**

Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Kg	5.5Kg Eqv
<b>Week 39 - begin 20/09/2014</b>							
Gwen	2,500	352					3,140
Hass	205,900	8,203	1,500				221,088
Reed	1,000						1,000
Wurtz	1,000	200					1,364
<b>Week Total</b>	<b>210,400</b>	<b>8,755</b>	<b>1,500</b>				<b>226,591</b>

<b>Week 40 - begin 27/09/2014</b>							
Gwen	432	440					1,232
Hass	239,850	8,726	5,000	1	500	3,000	257,260
Reed	1,000						1,000
<b>Week Total</b>	<b>241,282</b>	<b>9,166</b>	<b>5,000</b>	<b>1</b>	<b>500</b>	<b>3,000</b>	<b>259,492</b>

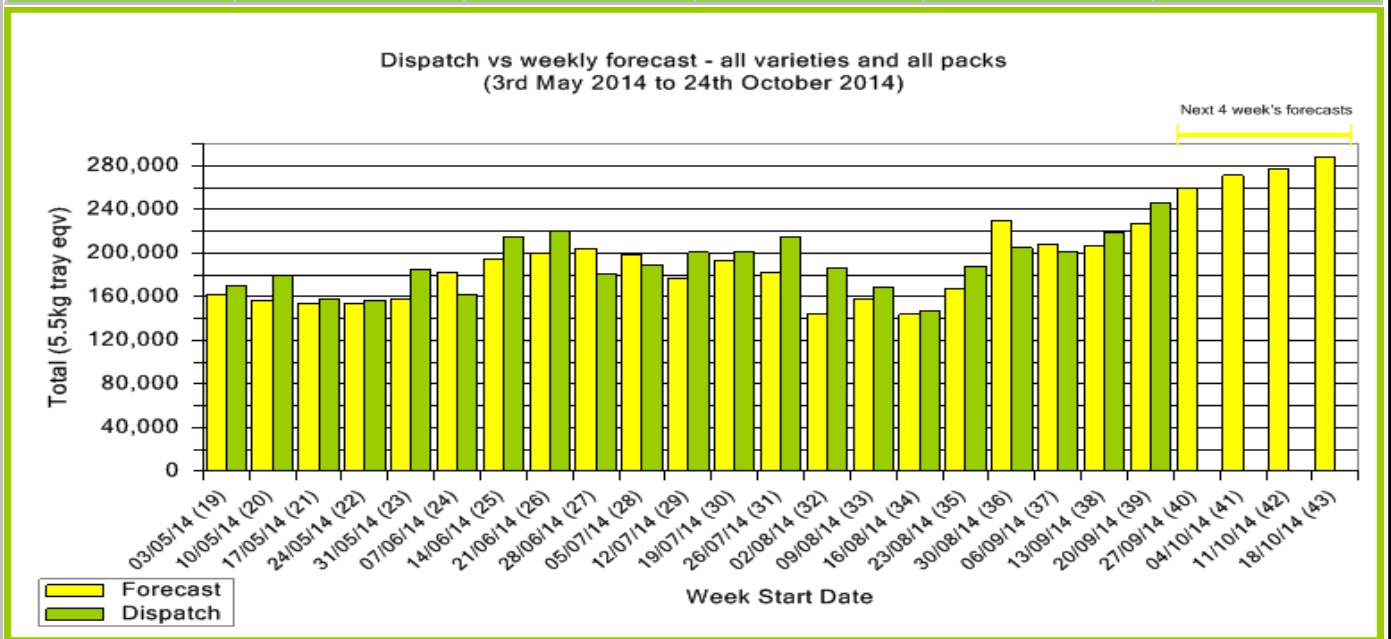
<b>Week 41 - begin 04/10/2014</b>							
Hass	251,910	8,406	5,500			3,000	268,739
Reed	1,000						1,000
Wurtz	1,000	200					1,364
<b>Week Total</b>	<b>253,910</b>	<b>8,606</b>	<b>5,500</b>			<b>3,000</b>	<b>271,102</b>

<b>Week 42 - begin 11/10/2014</b>							
Hass	257,780	8,956	7,500			5,000	276,337
Reed	1,000						1,000
<b>Week Total</b>	<b>258,780</b>	<b>8,956</b>	<b>7,500</b>			<b>5,000</b>	<b>277,337</b>

<b>Week 43 - begin 18/10/2014</b>							
Hass	269,570	9,056	6,000			5,000	288,035
<b>Week Total</b>	<b>269,570</b>	<b>9,056</b>	<b>6,000</b>			<b>5,000</b>	<b>288,035</b>

**Dispatch Data (Week 39 - begin 20/09/2014)**

Variety	Trays	Bulk	P/PK	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Gwen	2,600	660			3,800
Hass	219,385	12,113	5,160	1,140	242,554
Other		44			80
<b>Total</b>	<b>221,985</b>	<b>12,817</b>	<b>5,160</b>	<b>1,140</b>	<b>246,434</b>

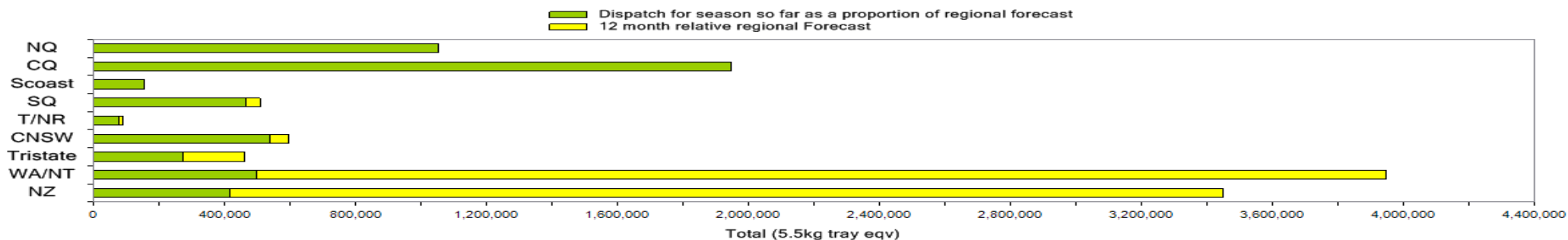


**New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015**

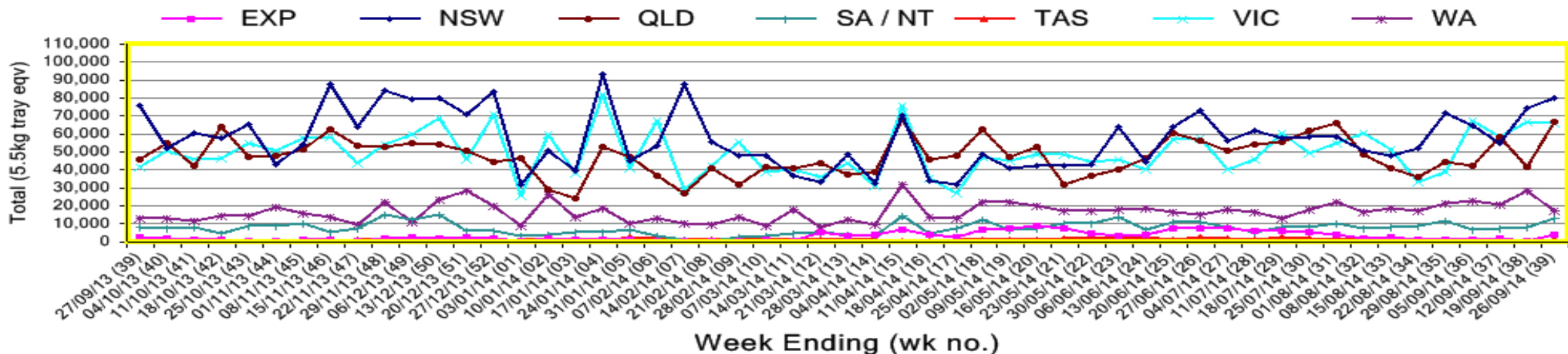
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	<b>3,352,347</b>
<b>Australia (from Infocado)</b>	123,747	293,918								<b>417,665</b>
<b>USA<sup>1</sup></b>	6	19								<b>25</b>
<b>Japan<sup>1</sup></b>	1,916	5,748								<b>7,664</b>
<b>Other Asia<sup>1</sup></b>	7,609	20,471								<b>28,080</b>
<b>Total</b>	<b>133,278</b>	<b>320,156</b>								<b>453,434</b>

<sup>1</sup> source: Statistics NZ adjusted for freight time to destination port. Source: Infoshare, NZ

Percentage dispatched by region (Based on seasonal forecast - 2014)



Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2014 to date = 6,845,845 5.5kg tray eqv



**Week 39 contributors - Packhouses**

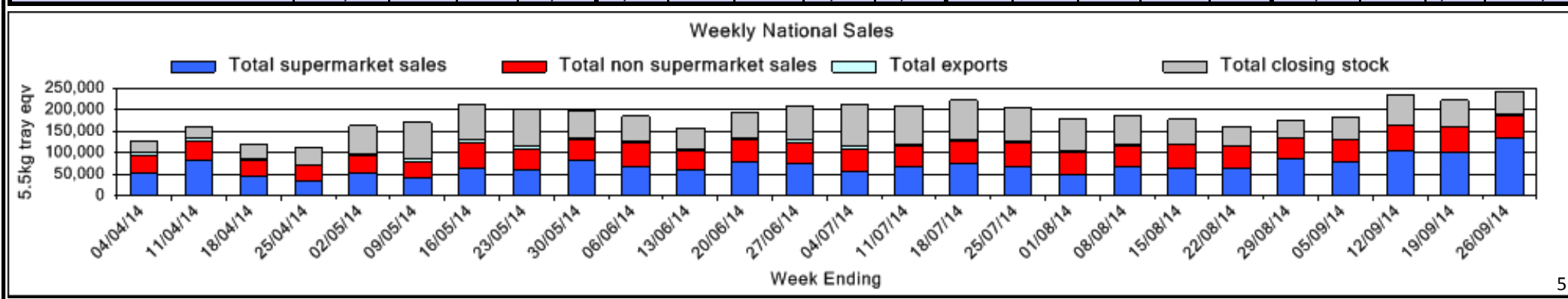
Natures Fruit Company (Consolidator)	Wodonga Park Fruit and Nuts (SQ)
One Harvest (Consolidator)	G & C Christensen (SC)
Sunfresh (Consolidator)	Bonyaricall Vineyards (TRI)
The Avolution (Consolidator)	Chislett Farms Pty Ltd (TRI)
Coastal Avocados (CNSW)	Golden Hill Packing Pty Ltd (TRI)
I & A Tolson (CNSW)	KV & JM Lehmann (TRI)
Midcoast Avocados (CNSW)	Advance Packing & Marketing Services P/L (WA)
Avocado Industry Council (NZAGA)	Avonova (WA)
Balmoral Orchard (SQ)	Delroy Orchards (WA)
Touchwood Farming (SQ)	TNR: Less than 3 contributors

**Week 39 contributors - Wholesalers**

Allcrops Pty Ltd (Sydney)	Murray Bros (Brisbane)
C & S Ponte Produce Pty Ltd (Melbourne)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Adelaide)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Melbourne)	The La Manna Group (Adelaide)
Dykes Bros (Melbourne)	The La Manna Group (Melbourne)
Etherington (Perth)	United Fresh (Adelaide)
Exotic Fruit Traders (Sydney)	WA Farm Direct (Perth)
Fresh Choice WA Pty Ltd (Perth)	

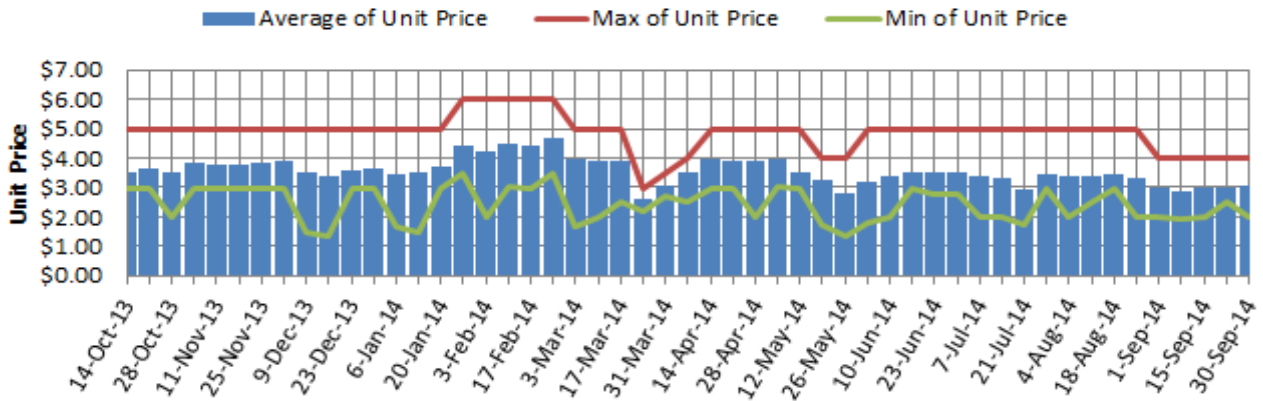
### Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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																		
<b>Total supermarket sales</b>	36,314			<b>36,314</b>	768			768	<b>1,396</b>	120			120	<b>22</b>	37,732			<b>37,732</b>
<b>Total non supermarket sales</b>	5,181		275	<b>5,456</b>	904			904	<b>1,644</b>						6,825		275	<b>7,100</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>41,495</b>		<b>275</b>	<b>41,770</b>	<b>1,672</b>			<b>1,672</b>	<b>3,040</b>	<b>120</b>			<b>120</b>	<b>22</b>	<b>44,557</b>		<b>275</b>	<b>44,832</b>
<b>Total Stock on Hand</b>	<b>3,334</b>		<b>23</b>	<b>3,357</b>	<b>288</b>			<b>288</b>	<b>524</b>						<b>3,858</b>		<b>23</b>	<b>3,881</b>
QLD																		
<b>Total supermarket sales</b>	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total non supermarket sales</b>	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total exports</b>	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
<b>Total sales</b>	<b>44,122</b>			<b>44,122</b>	<b>95</b>			<b>95</b>	<b>173</b>	<b>780</b>			<b>780</b>	<b>142</b>	<b>44,437</b>			<b>44,437</b>
<b>Total Stock on Hand</b>																		
SA & TAS																		
<b>Total supermarket sales</b>	14,396			<b>14,396</b>	1,056			1,056	<b>1,920</b>						16,316			<b>16,316</b>
<b>Total non supermarket sales</b>	4,310		145	<b>4,455</b>	1,133		102	1,235	<b>2,245</b>						6,370		330	<b>6,700</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>18,706</b>		<b>145</b>	<b>18,851</b>	<b>2,189</b>		<b>102</b>	<b>2,291</b>	<b>4,165</b>					<b>22,686</b>		<b>330</b>	<b>23,016</b>	
<b>Total Stock on Hand</b>	<b>14,278</b>		<b>231</b>	<b>14,509</b>	<b>676</b>		<b>121</b>	<b>797</b>	<b>1,449</b>					<b>15,507</b>		<b>451</b>	<b>15,958</b>	
VIC																		
<b>Total supermarket sales</b>	32,467			<b>32,467</b>	2,208			2,208	<b>4,015</b>	120			120	<b>22</b>	36,503			<b>36,503</b>
<b>Total non supermarket sales</b>	18,446		346	<b>18,792</b>	1,448		95	1,543	<b>2,805</b>	2			2		21,079		519	<b>21,598</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>50,913</b>		<b>346</b>	<b>51,259</b>	<b>3,656</b>		<b>95</b>	<b>3,751</b>	<b>6,820</b>	<b>122</b>			<b>122</b>	<b>22</b>	<b>57,583</b>		<b>519</b>	<b>58,102</b>
<b>Total Stock on Hand</b>	<b>17,315</b>		<b>594</b>	<b>17,909</b>	<b>532</b>		<b>29</b>	<b>561</b>	<b>1,020</b>						<b>18,283</b>		<b>647</b>	<b>18,929</b>
WA																		
<b>Total supermarket sales</b>	10,353			<b>10,353</b>	221			221	<b>402</b>						10,755			<b>10,755</b>
<b>Total non supermarket sales</b>	5,305			<b>5,305</b>	1,047			1,047	<b>1,904</b>						7,209			<b>7,209</b>
<b>Total exports</b>	1,900			<b>1,900</b>	923			923	<b>1,678</b>						3,578			<b>3,578</b>
<b>Total sales</b>	<b>17,558</b>			<b>17,558</b>	<b>2,191</b>			<b>2,191</b>	<b>3,984</b>						<b>21,542</b>			<b>21,542</b>
<b>Total Stock on Hand</b>	<b>3,396</b>			<b>3,396</b>	<b>177</b>			<b>177</b>	<b>322</b>						<b>3,718</b>			<b>3,718</b>
Total																		
<b>Total supermarket sales</b>	128,070			<b>128,070</b>	4,253			4,253	<b>7,733</b>	1,020			1,020	<b>185</b>	135,988			<b>135,988</b>
<b>Total non supermarket sales</b>	42,824		766	<b>43,590</b>	4,627		197	4,824	<b>8,771</b>	2			2		51,237		1,124	<b>52,362</b>
<b>Total exports</b>	1,900			<b>1,900</b>	923			923	<b>1,678</b>						3,578			<b>3,578</b>
<b>Total sales</b>	<b>172,794</b>		<b>766</b>	<b>173,560</b>	<b>9,803</b>		<b>197</b>	<b>10,000</b>	<b>18,182</b>	<b>1,022</b>			<b>1,022</b>	<b>186</b>	<b>190,804</b>		<b>1,124</b>	<b>191,928</b>
<b>Total Stock on Hand</b>	<b>47,121</b>		<b>848</b>	<b>47,969</b>	<b>1,769</b>		<b>150</b>	<b>1,919</b>	<b>3,489</b>						<b>50,338</b>		<b>1,121</b>	<b>51,45</b>

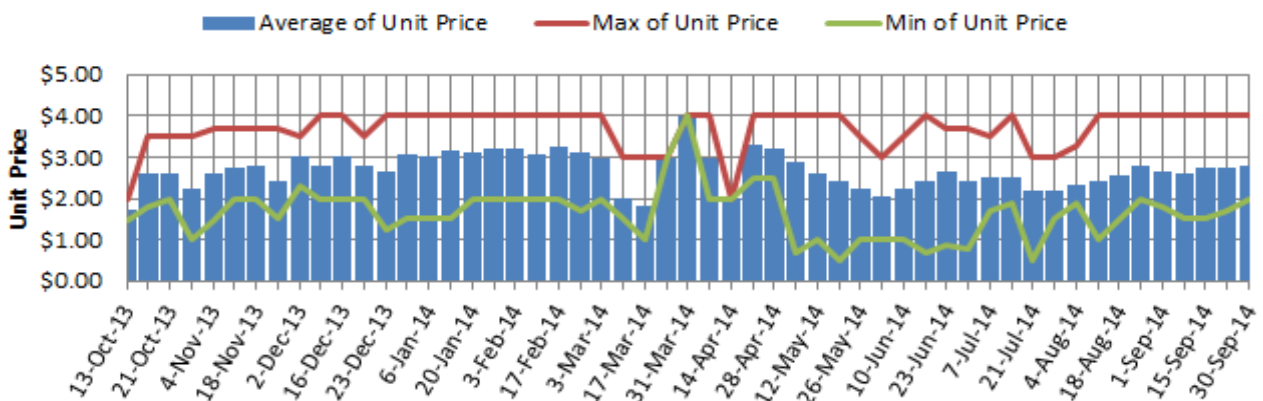




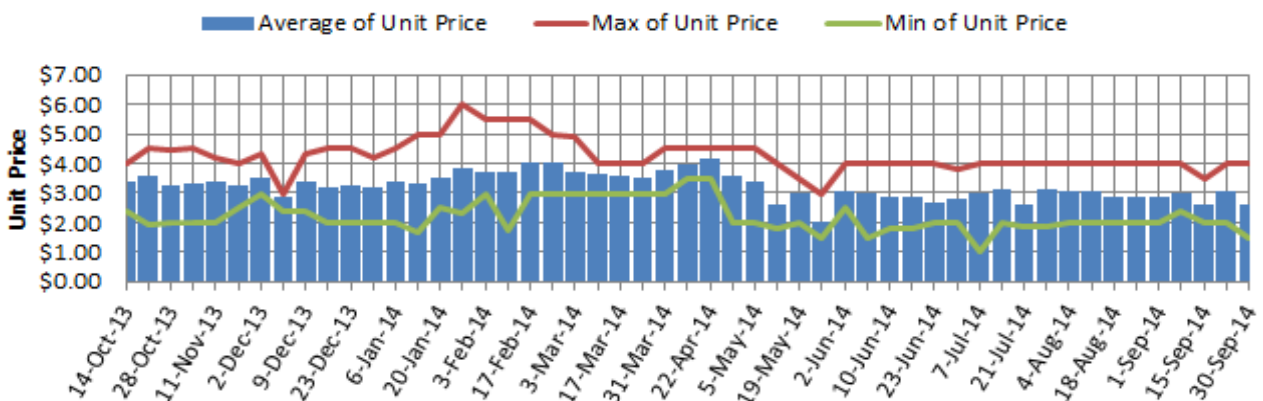
### Hass Avocado Average Retail Prices - Sydney



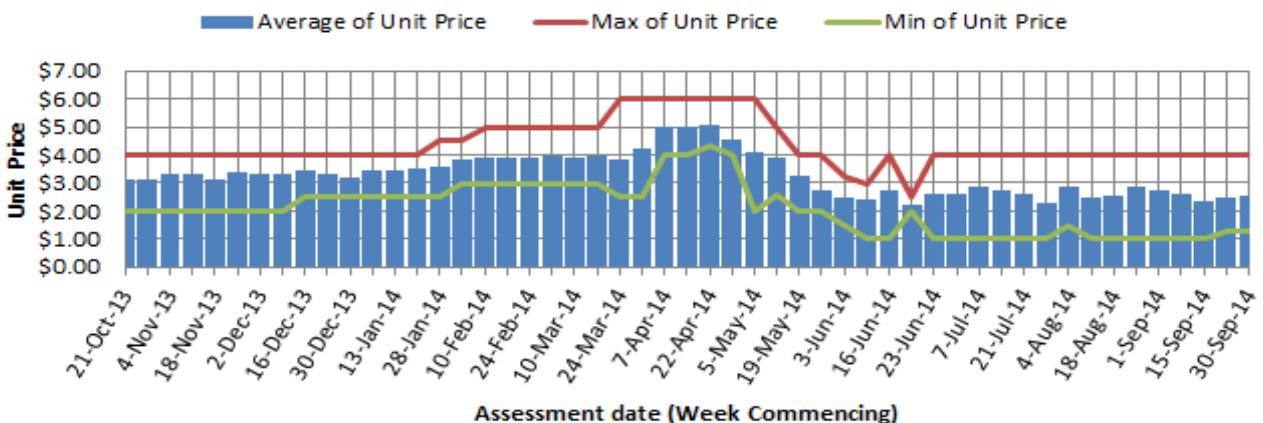
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

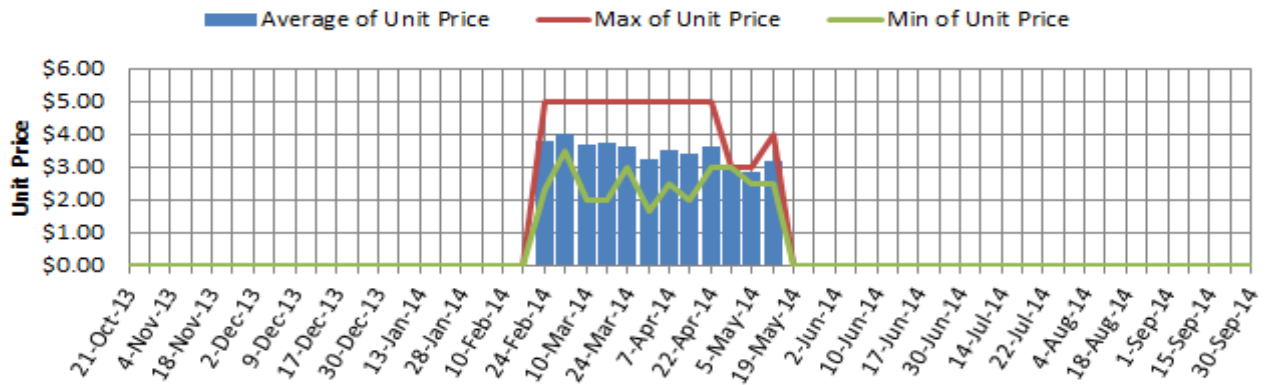


### Hass Avocado Average Retail Prices - Perth

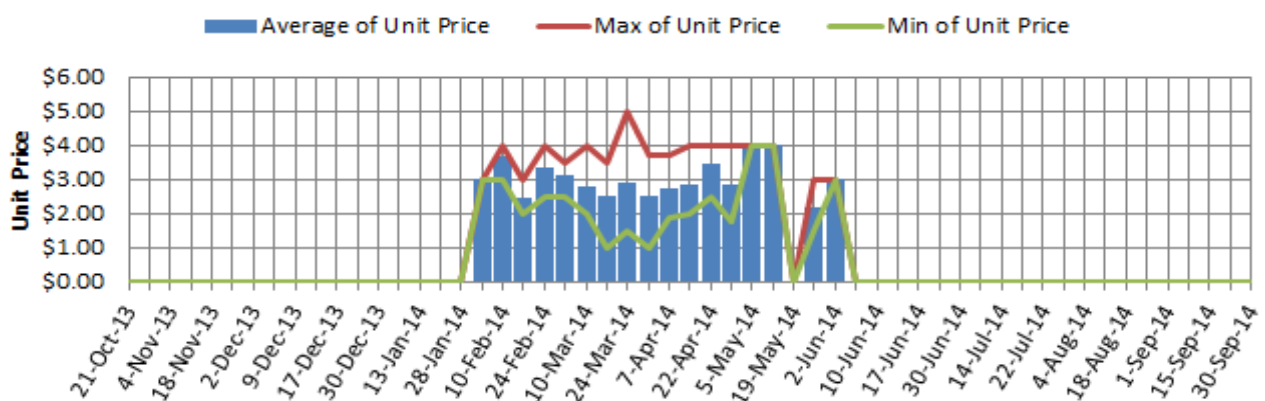


Assessment date (Week Commencing)

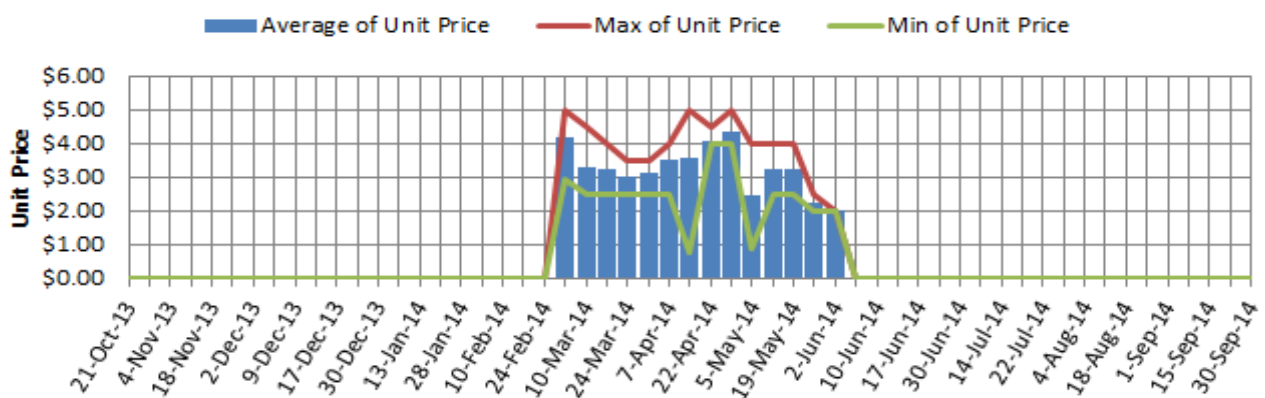
## Shepard Avocado Average Retail Prices - Sydney



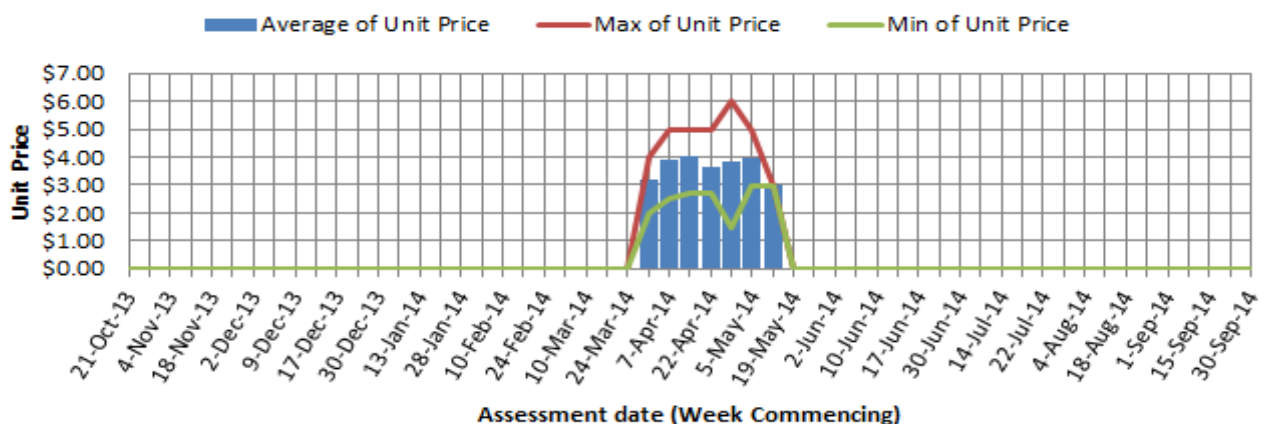
## Shepard Avocado Average Retail Prices - Brisbane



## Shepard Avocado Average Retail Prices - Melbourne



## Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 30th September 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>						<b>MELBOURNE</b>					
IGA	Hass	230	1.99	Store	NZ	I	Hass	180	1.49	No	NS
I	Hass	190	1.99	No	NZ	Safeway	Hass	260	1.56	No	Aus
I	Reed	330	1.99	No	Aus	IS	Hass	250	1.99	No	NZ
Woolworths	Hass	250	2.88	Store	Aus	Safeway	Hass	155	1.99	No	NS
Woolworths	Hass	240	2.88	No	Aus	Coles	Hass	200	2.40	Store	Aus
Woolworths	Hass	250	2.88	No	Aus	Coles	Hass	240	2.40	Store	Aus
Coles	Hass	280	2.98	No	Aus	Coles	Hass	220	2.40	Store	Aus
Coles	Hass	230	2.98	No	Aus	I	Hass	220	2.49	No	Aus
Coles	Hass	250	2.98	No	Aus	I	Hass	250	2.69	No	Aus
I	Hass	260	2.99	No	Aus	Woolworths	Hass	285	2.78	Store	Aus
Foodworks	Hass	260	2.99	No	NZ	I	Hass	325	2.79	No	NS
I	Hass	260	2.99	No	Aus	IGA	Hass	250	2.99	No	NZ
I	Hass	260	2.99	No	Aus	I	Hass	250	3.39	No	Aus
I	Reed	340	2.99	No	Aus	I	Hass	300	3.79	No	Aus
IGA	Hass	250	3.49	No	Aus	I	Hass	250	3.98	No	Aus
I	Hass	300	3.69	No	NZ	<b>PERTH</b>					
I	Hass	310	3.99	No	Aus	IGA	Hass	150	1.29	No	Aus
I	Hass	310	3.99	No	NZ	IS	Hass	150	1.49	Store	Aus
<b>BRISBANE</b>						I	Hass	240	1.78	No	Aus
Woolworths	Hass	200	1.98	No	Aus	Coles	Hass	200	1.90	Store	Aus
IC	Hass	195	1.99	No	Aus	Coles	Hass	180	2.48	No	Aus
I	Hass	285	2.49	No	NZ	Coles	Hass	225	2.48	No	Aus
IC	Hass	260	2.49	No	NZ	Woolworths	Hass	205	2.58	No	Aus
I	Hass	175	2.50	No	NZ	Woolworths	Hass	220	2.58	No	Aus
Woolworths	Hass	200	2.88	Store	Aus	Woolworths	Hass	230	2.58	No	Aus
Woolworths	Hass	215	2.88	No	Aus	I	Hass	245	2.79	No	Aus
Coles	Hass	220	2.98	No	Aus	I	Hass	275	2.89	No	Aus
Coles	Hass	220	2.98	No	Aus	IGA	Hass	285	2.99	No	Aus
IGA	Hass	200	2.98	No	Aus	IGA	Hass	240	2.99	No	Aus
I	Hass	250	2.99	No	NZ	IGA	Hass	280	2.99	No	Aus
I	Hass	310	3.00	No	Aus	I	Hass	265	2.99	No	Aus
IGA	Hass	275	3.99	No	Aus	I	Hass	280	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

### 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