



INFOCADO WEEKLY REPORT: 11th — 17th October 2014 (Wk 42)



[Click here to learn How to conduct Dry Matter tests at home](#)

[Click here to for a refresher on how to contribute to Infocado](#)

[Click here for tips for using and interpreting Infocado Reports](#)

[Click here to download avocado supply chain education materials](#)

Comments

- The average retail price per Hass avocado has slightly eased across the major cities in relation to the record volume of fruit that the industry is currently observing (refer page 6).
- The Australian marketplace has yet again seen a new record of weekly dispatches at approx. 344,376 (5.5kg tray eqv.). The four weekly forecast indicates dispatch volumes to level out and slightly ease over the coming month period (refer page 3).
- The wholesaler sector continues to indicate good movement of available fruit through the supply chain (refer page 4).
- All regions have all but finished with the vast majority of volume now being supplied from WA and NZ (refer page 4).

Measuring that Avocado Feeling

Throughout the development of the new television campaign, Avocados Australia and HAL have undertaken a rigorous process of consumer research to ensure that the final ad is delivering the right message to consumers. This process involved testing the campaign ad at all stages of development to provide the industry with reassurance that the ad would indeed help to achieve increasing the consumption of Australian Avocados.

The ad campaign's effectiveness and consumer behaviour against the objectives has continued to be monitored by a number of methods. These include the longitudinal Fruit Tracker (MT14014), Nielsen data (MT14012) and our dedicated campaign tracker (AV13014 & AV14008). The campaign tracker is a dedicated survey that replicates the Project Accelerator strategic research which was first implemented in October 2012 defining our new segmentation and direction.

The key findings that the results indicate since the last survey was conducted is that the proportion of Lovers and Enthusiasts have grown and now represent 67% of total avocado purchase volume which is a key marketing objective. Importantly the ad makes consumers feel both Hungry and Happy making them want to buy an avocado, with 60% saying the ad makes them want to eat an avocado. Overall the recommendation from the research results was that continued investment in television advertising using this ad would continue to deliver positive returns for the industry.

For a full brief please refer to the latest Guacamole.

Upcoming Holidays

Labour Day (NZ): 28th Oct | Melbourne Cup (VIC): 4th Nov | G20 Leaders' Summit (Brisbane Area): 14th Nov | Christmas Day: 25th Dec |

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:

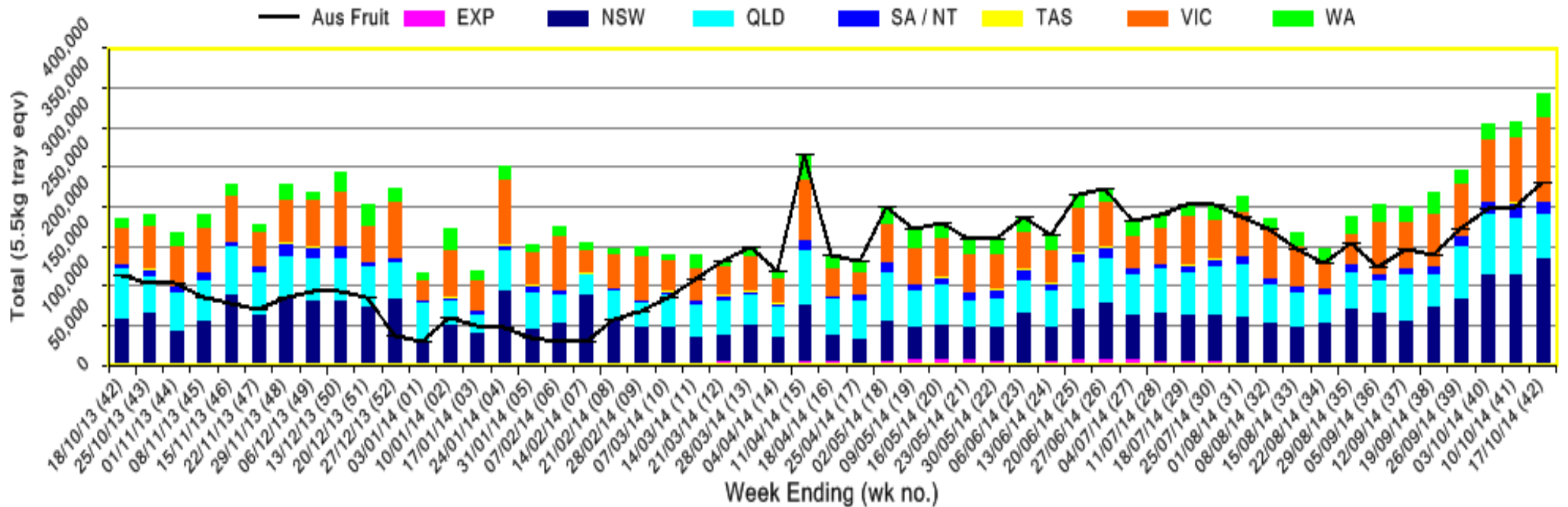
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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.

This message is intended only for the use of the addressee, is confidential and may also be legally privileged. If you are not the intended recipient, please notify us immediately. You should not copy it or use it for any purpose, nor disclose its contents to any other person. If you have already received this transmission in error, please notify us immediately by telephone and delete all copies of this transmission together with any attachments. The views and opinions expressed in this e-mail message are the author's own and may not reflect the views and opinions of Avocados Australia Limited.

Industry Dispatches By Destination State and Count Size : 11th October - 17th October 2014 (Wk 42)

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						126	124		1,760	2,010	192	1,200		2,577
NSW	1,355	5,468	12,210	32,168	16	22,811	24,911	9,691	7,264	115,894	8,073	5,214		131,520
QLD	18	2,449	6,023	11,912		12,055	7,729	5,506	2,707	48,399	3,820		1,140	55,551
SA / NT	480	1,135	2,003	3,856		1,029	4,129	699	232	13,563	1,236			15,810
TAS							800	456		1,256				1,256
VIC	331	4,855	8,211	23,300		21,896	23,330	9,093	5,491	96,507	5,070	660		105,845
WA	461	1,501	681	3,554		4,883	7,821	7,811	31	26,743	2,790			31,816
Total	2,645	15,408	29,128	74,790	16	62,800	68,844	33,256	17,485	304,372	21,181	7,074	1,140	344,376

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 7,803,177 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 42 - 46)

Variety	Trays - Total	Bulk	P/Pk	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 42 - begin 11/10/2014						
Gwen	110	20				146
Hass	276,360	13,006	7,500		5,000	302,280
Lamb Hass	150					150
Reed	1,000	192		1,000		1,531
Wurtz	1,500	200		500		1,955
Week Total	279,120	13,418	7,500	1,500	5,000	306,062

Week 43 - begin 18/10/2014						
Hass	270,162	15,856	8,000		10,000	302,264
Reed	1,000	192		1,000		1,531
Week Total	271,162	16,048	8,000	1,000	10,000	303,795

Week 44 - begin 25/10/2014						
Hass	274,622	14,146	6,000		5,000	302,342
Reed	2,000	442		1,800		3,131
Wurtz	1,000	100		500		1,273
Week Total	277,622	14,688	6,000	2,300	5,000	306,745

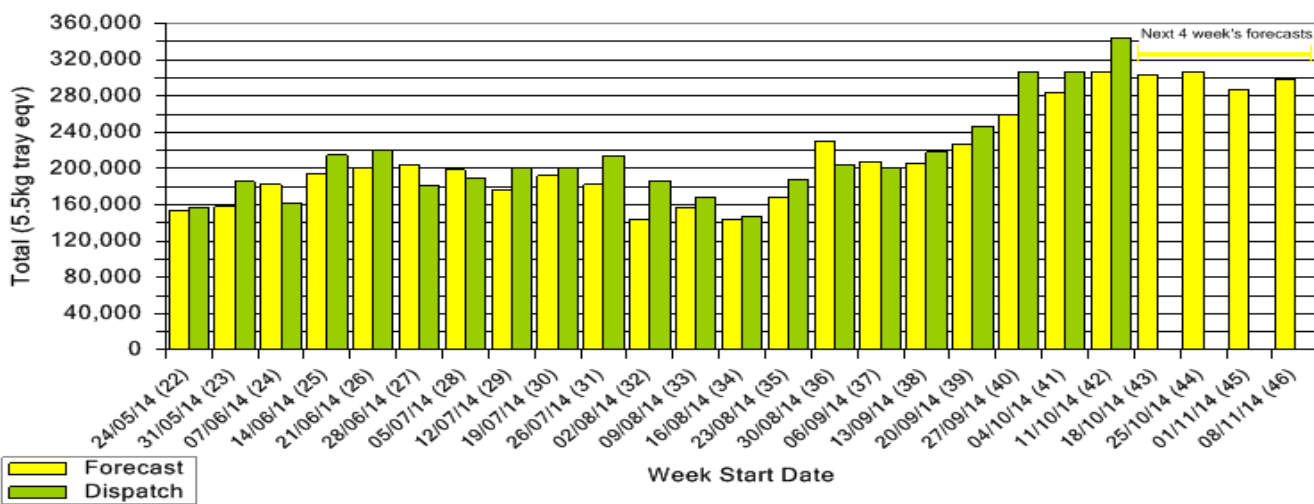
Week 45 - begin 01/11/2014						
Hass	257,972	12,871	6,000		5,000	283,374
Lamb Hass	800	40				873
Reed	2,000	442		1,800		3,131
Week Total	260,772	13,353	6,000	1,800	5,000	287,377

Week 46 - begin 08/11/2014						
Hass	270,812	12,350	6,000		5,000	295,267
Reed	2,000	442		800		2,949
Week Total	272,812	12,792	6,000	800	5,000	298,215

Dispatch Data (Week 42 - begin 11/10/2014)

Variety	Trays	Bulk	P/PK	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Gwen	145	7			158
Hass	299,484	20,888	7,074	1,140	338,955
Lamb Hass	1,986	182			2,317
Reed	802				802
Wurtz	1,955	104			2,144
Total	304,372	21,181	7,074	1,140	344,376

Dispatch vs weekly forecast - all varieties and all packs (24th May 2014 to 14th November 2014)

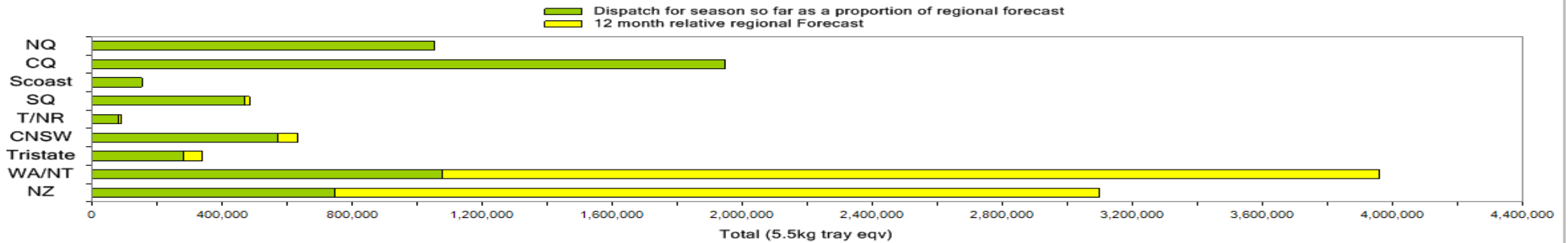


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

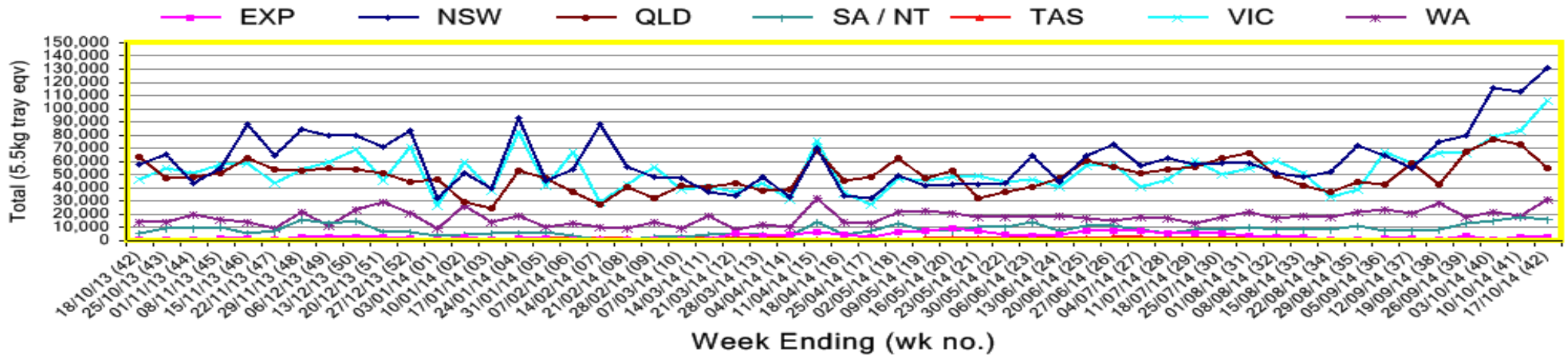
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	512,077	474,424	524,894	636,960	511,304	329,556	5,280	3,352,347
Australia (from Infocado)	123,747	293,918	331,784							749,449
USA¹	6	19								25
Japan¹	1,916	5,748								7,664
Other Asia¹	7,609	20,471								28,080
Total	133,278	320,156	331,784							785,218

1 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 = 7,799,397 5.5kg tray eqv



Week 42 contributors - Packhouses

Natures Fruit Company (Consolidator)	Ashbourne Hills Avocados (TRI)
The Evolution (Consolidator)	Avonova (WA)
I & A Tolson (CNSW)	Delroy Orchards (WA)
Coastal Avocados (CNSW)	West Aussie Avos (WA)
Midcoast Avocados (CNSW)	Advance Packing & Marketing Services P/L (WA)
Avocado Industry Council (NZAGA)	Simpson Farms Pty Ltd (WA)
Bonyaricall Vineyards (TRI)	SQ: Less than 3 contributors
KV & JM Lehmann (TRI)	TNR: Less than 3 contributors

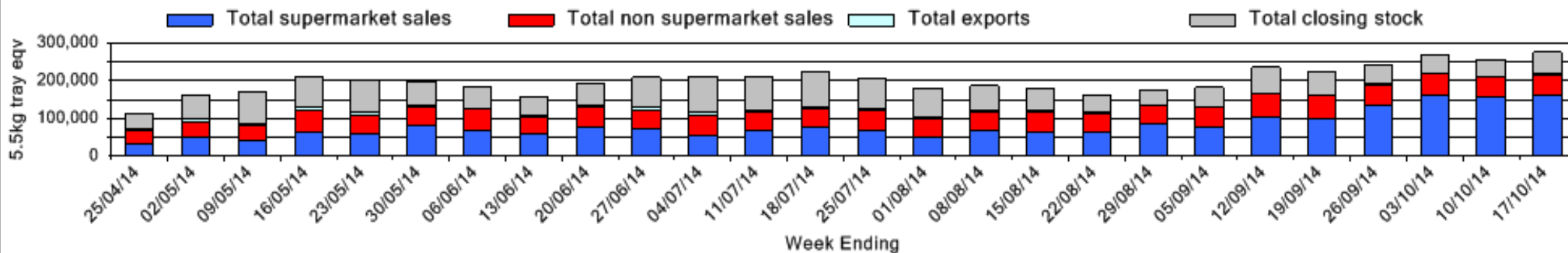
Week 42 contributors - Wholesalers

Allcrops Pty Ltd (Sydney)	Fresh Choice WA Pty Ltd (Perth)
C & S Ponte Produce Pty Ltd (Melbourne)	Murray Bros (Brisbane)
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)
Favco Queensland Pty Ltd (Brisbane)	WA Farm Direct (Perth)

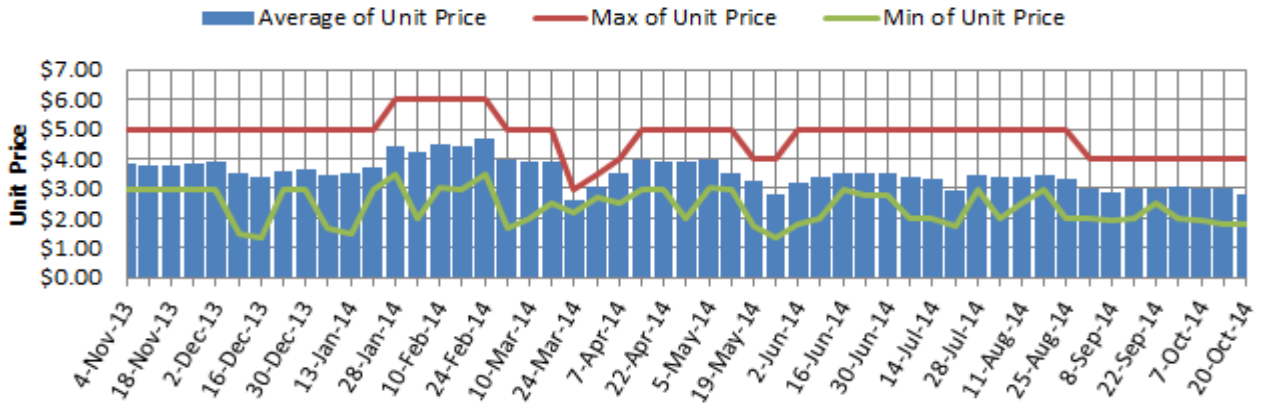
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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	55,167		181	55,348	1,366			1,366	2,484						57,651		181	57,832
Total Stock on Hand																		
QLD																		
Total supermarket sales	26,663		304	26,967	768			768	1,396						28,059		304	28,363
Total non supermarket sales	16,202			16,202	471			471	856						17,058			17,058
Total exports																		
Total sales	42,865		304	43,169	1,239			1,239	2,253						45,118		304	45,422
Total Stock on Hand	12,382			12,382	9			9	16						12,398			12,398
SA & TAS																		
Total supermarket sales	17,775			17,775	768			768	1,396						19,171			19,171
Total non supermarket sales	7,731		27	7,758	2,234		31	2,265	4,118						11,793		83	11,876
Total exports																		
Total sales	25,506		27	25,533	3,002		31	3,033	5,515						30,964		83	31,048
Total Stock on Hand	19,333		532	19,865	630			630	1,145						20,478		532	21,010
VIC																		
Total supermarket sales	43,518			43,518	2,056			2,056	3,738						47,256			47,256
Total non supermarket sales	11,969		920	12,889	1,067		335	1,402	2,549						13,909		1,529	15,438
Total exports																		
Total sales	55,487		920	56,407	3,123		335	3,458	6,287						61,165		1,529	62,694
Total Stock on Hand	14,089		159	14,248	416		3	419	762	120			120	22	14,867		164	15,031
WA																		
Total supermarket sales	12,834			12,834	523			523	951						13,785			13,785
Total non supermarket sales	4,754			4,754	807			807	1,467						6,221			6,221
Total exports	2,010			2,010	192			192	349	1,200			1,200	218	2,577			2,577
Total sales	19,598			19,598	1,522			1,522	2,767	1,200			1,200	218	22,583			22,583
Total Stock on Hand	5,975			5,975	311		7	318	578						6,540		13	6,553
Total																		
Total supermarket sales	152,648		485	153,133	5,075			5,075	9,227						161,875		485	162,360
Total non supermarket sales	43,965		947	44,912	4,985		366	5,351	9,729						53,028		1,613	54,641
Total exports	2,010			2,010	192			192	349	1,200			1,200	218	2,577			2,577
Total sales	198,623		1,432	200,055	10,252		366	10,618	19,305	1,200			1,200	218	217,481		2,098	219,579
Total Stock on Hand	53,463		691	54,154	1,366		10	1,376	2,502	120			120	22	55,968		709	56,677

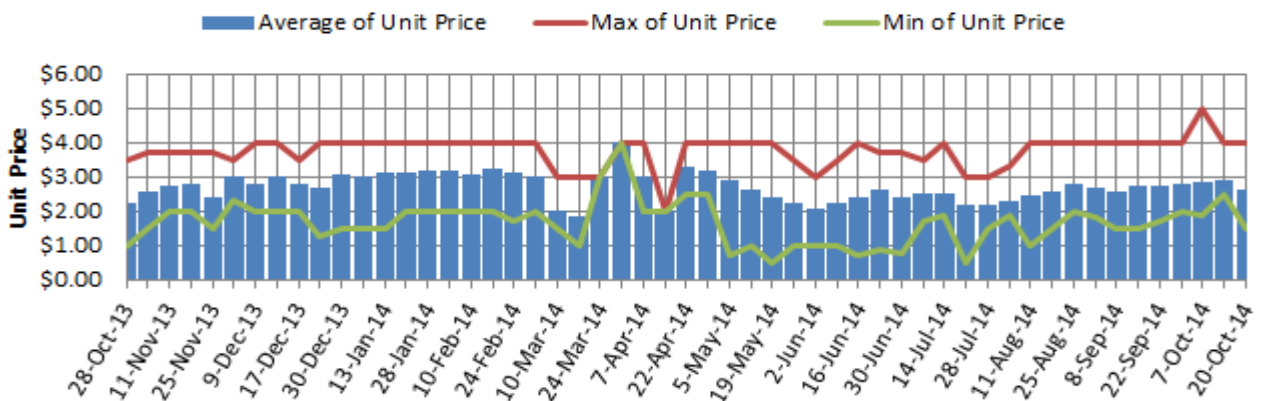
Weekly National Sales



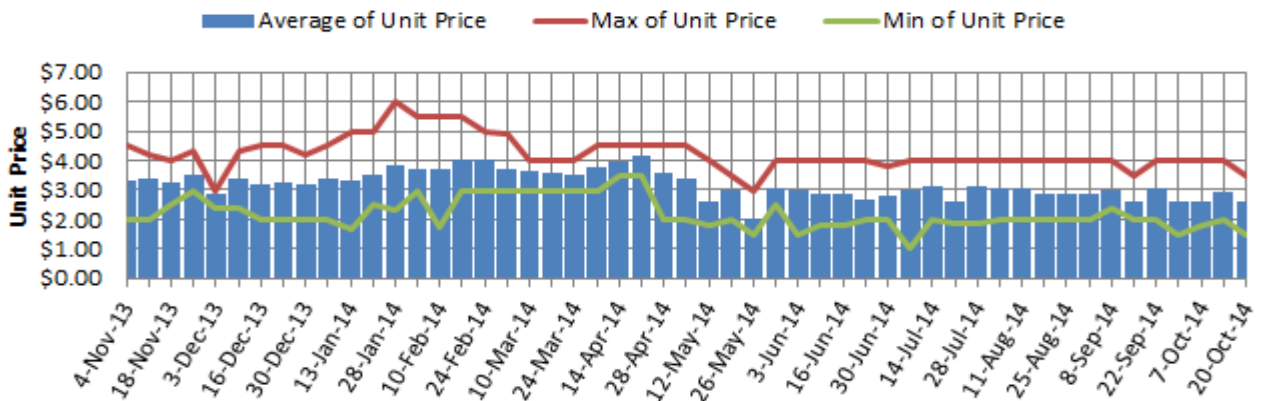
Hass Avocado Average Retail Prices - Sydney



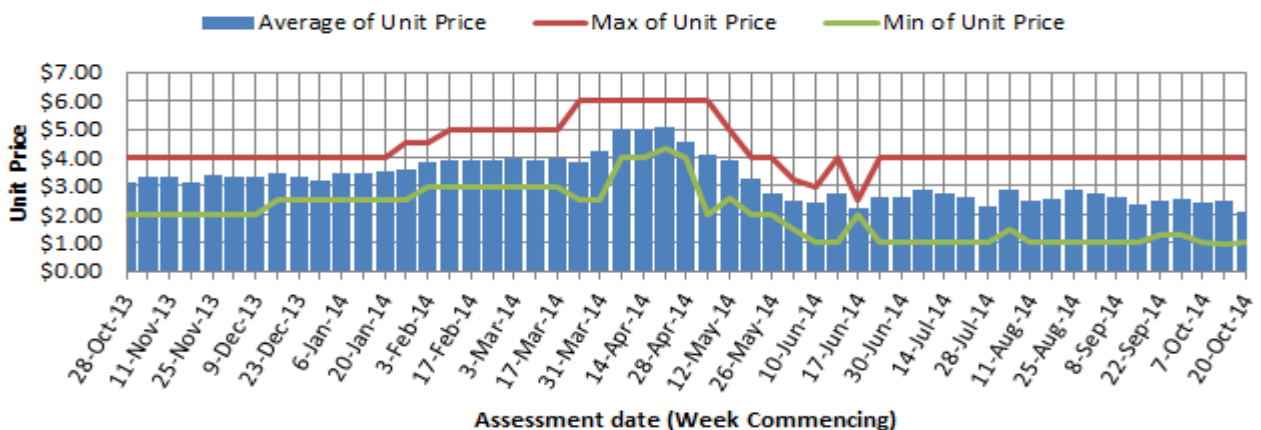
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

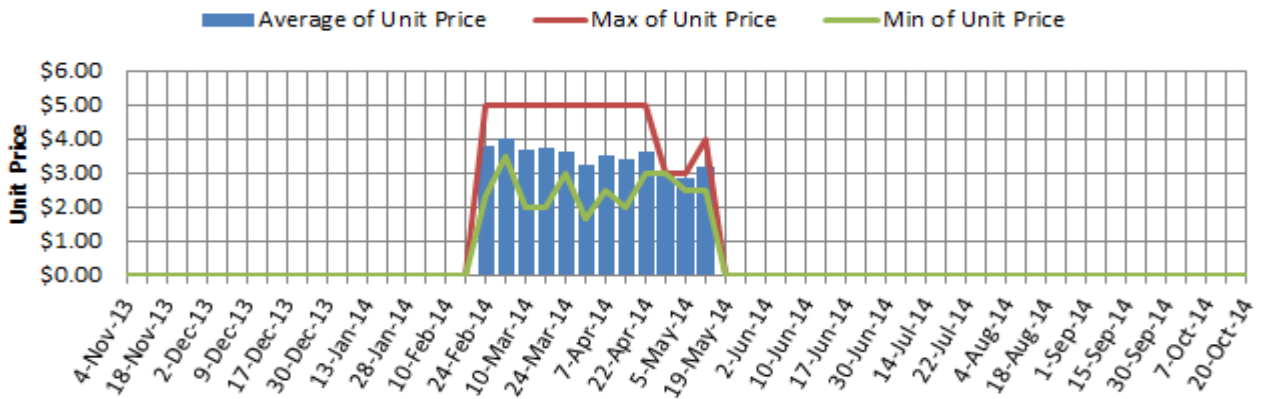


Hass Avocado Average Retail Prices - Perth

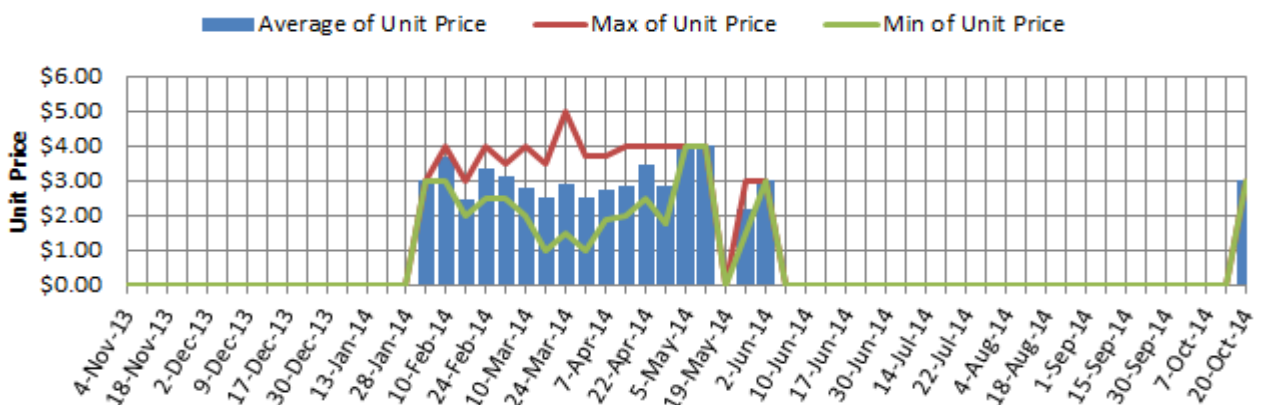


Assessment date (Week Commencing)

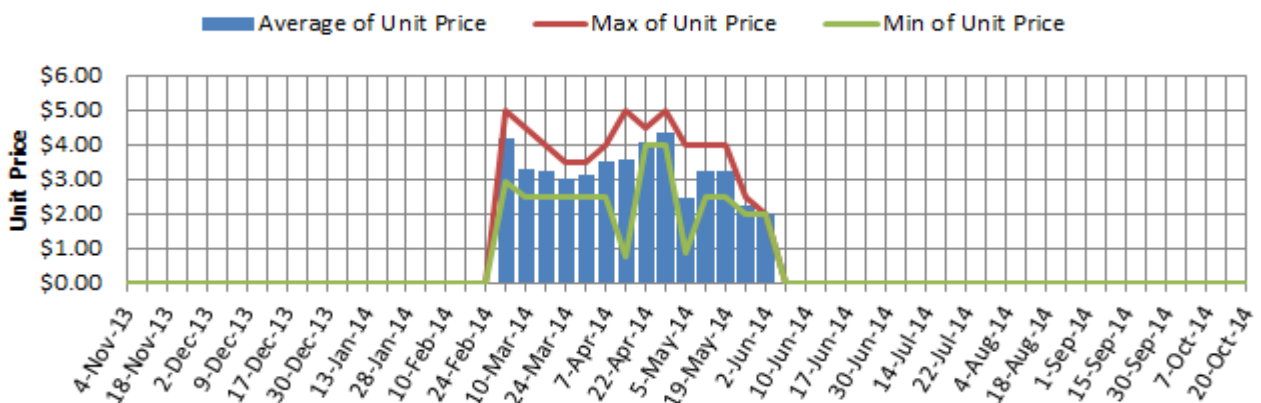
Shepard Avocado Average Retail Prices - Sydney



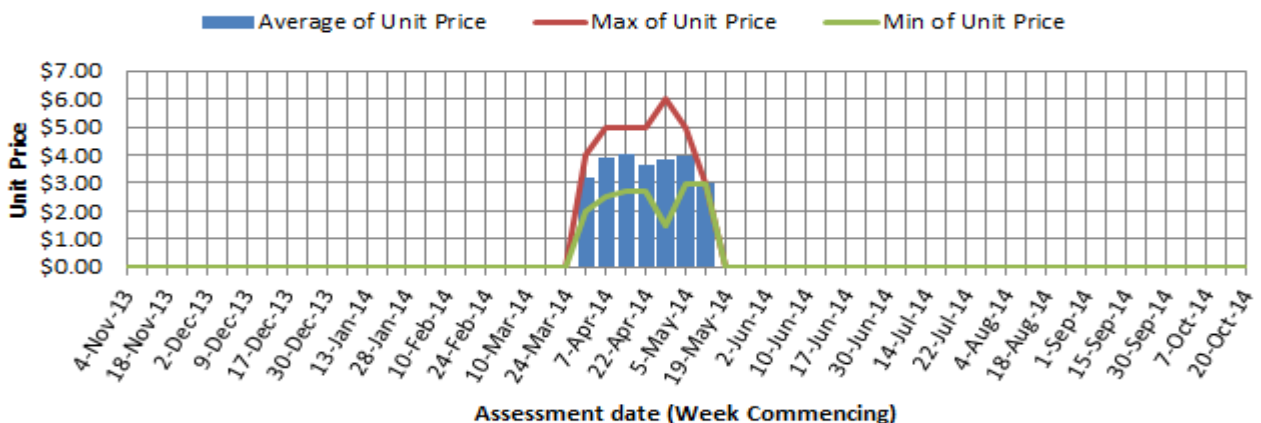
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 20th October 2014

Store Type	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store Type	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
Woolworths	Hass	310	1.78	Cat	Aus	IS	Hass	260	1.50	No	NZ
Woolworths	Hass	290	1.78	Cat	Aus	I	Hass	210	1.99	No	NZ
Woolworths	Hass	280	1.78	Cat	Aus	I	Hass	210	2.29	No	NS
IGA	Hass	220	1.99	Store	NZ	I	Hass	180	2.40	No	Aus
I	Reed	380	2.49	No	Aus	Woolworths	Hass	270	2.48	Cat	Aus
Coles	Hass	270	2.98	No	Aus	Coles	Hass	250	2.48	Cat	Aus
Coles	Hass	280	2.98	No	Aus	Woolworths	Hass	200	2.48	Cat	Aus
Coles	Hass	270	2.98	No	Aus	Coles	Hass	190	2.48	Cat	Aus
I	Hass	260	2.99	No	Aus	Coles	Hass	200	2.48	Cat	Aus
Foodworks	Hass	290	2.99	No	NZ	Woolworths	Hass	270	2.48	Cat	Aus
I	Hass	260	2.99	No	Aus	I	Hass	340	2.69	No	Aus
I	Hass	260	2.99	No	Aus	IGA	Hass	240	2.99	Cat	NZ
I	Hass	300	2.99	No	Aus	I	Hass	350	3.19	No	Aus
I	Hass	300	2.99	No	Aus	I	Hass	340	3.19	No	Aus
I	Reed	400	3.49	No	Aus	I	Hass	280	3.39	No	Aus
IGA	Hass	270	3.49	No	Aus	I	Hass	340	3.48	Store	Aus
I	Hass	320	3.49	No	Aus	PERTH					
I	Hass	300	3.99	No	Aus	IGA	Hass	130	0.99	No	Aus
BRISBANE						IS	Hass	160	0.99	Store	Aus
I	Hass	295	1.49	No	NZ	I	Hass	150	1.28	Store	Aus
IGA	Hass	230	1.69	Cat	NZ	Coles	Hass	210	1.60	No	Aus
Coles	Hass	280	2.48	No	NZ	Coles	Hass	180	1.60	No	Aus
Coles	Hass	300	2.48	No	NZ	Coles	Hass	180	1.60	No	Aus
Coles	Hass	290	2.48	No	NZ	IGA	Hass	220	1.69	Cat	Aus
I	Hass	275	2.49	No	NZ	IGA	Hass	220	1.69	Cat	Aus
I	Hass	250	2.49	No	NZ	Woolworths	Hass	205	1.98	No	Aus
Woolworths	Hass	240	2.68	No	Aus	Woolworths	Hass	220	1.98	No	Aus
Woolworths	Reed	295	2.68	No	Aus	Woolworths	Hass	220	1.98	No	Aus
Woolworths	Hass	245	2.68	No	Aus	I	Hass	235	2.79	No	Aus
Woolworths	Hass	220	2.68	No	Aus	I	Hass	280	2.99	No	Aus
I	Hass	205	2.69	No	NZ	I	Hass	285	2.99	No	Aus
I	Shepard	255	2.99	No	Aus	IGA	Hass	295	2.99	No	Aus
I	Hass	320	3.49	No	Aus	I	Hass	270	3.99	No	Aus
IGA	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