



INFOCADO WEEKLY REPORT: 18th — 24th October 2014 (Wk 43)



Comments

- The Australian marketplace continues to set new records through weekly dispatches and national sales (refer page 2 & 5)
- The weekly dispatch exceeded the forecast volume substantially for the fourth week, dispatches were approx. 361,710 (5.5kg tray eqv.) a new record high. AAL would like to remind all contributors to update their four weekly forecast (refer page 2 & 3).
- The wholesaler sector also set a new high for the avocado industry recording a large number of national sales with remaining stock on hand holding steady in comparison to overall dispatch volume (refer page 5).
- The average retail price per Hass avocado remains healthy across all major cities with minimal movement in relation to the increased volume. Woolworths in Sydney are currently running a catalogue special no doubt aiding the movement of fruit (refer page 6 & 8).

[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](#)

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

Melbourne Cup (VIC): 4th Nov | G20 Leaders' Summit (Brisbane Area): 14th Nov | Christmas Day: 25th Dec | Boxing Day: 26th 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:

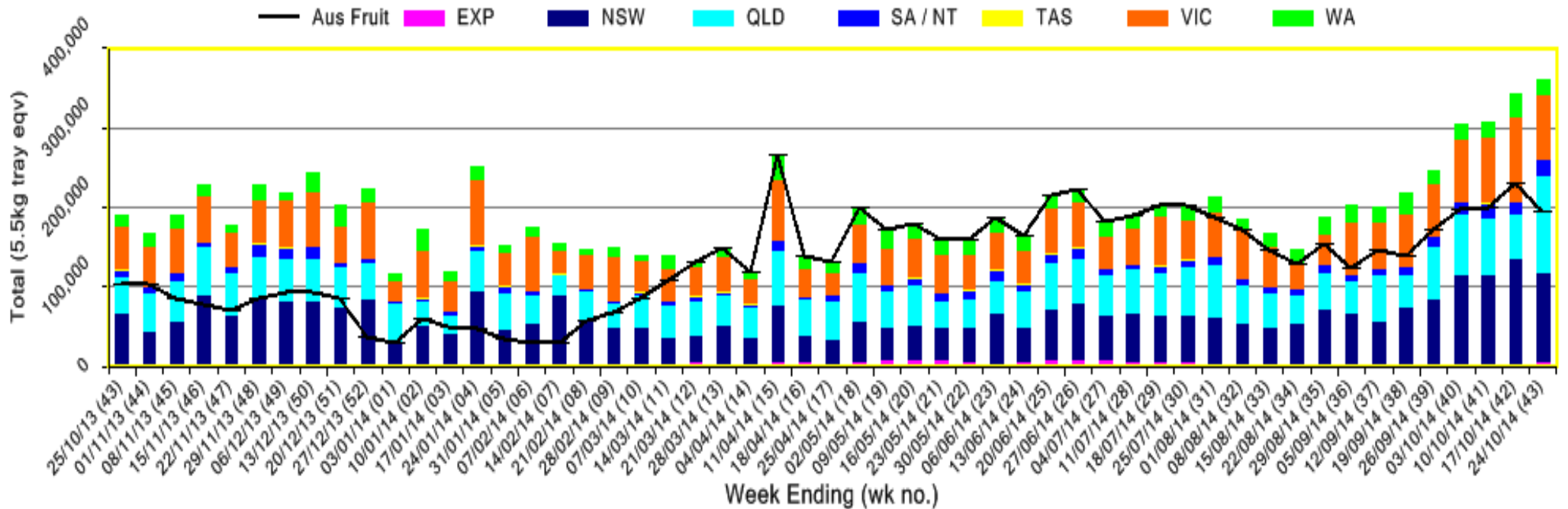
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons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

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Industry Dispatches By Destination State and Count Size : 18th October - 24th October 2014 (Wk 43)

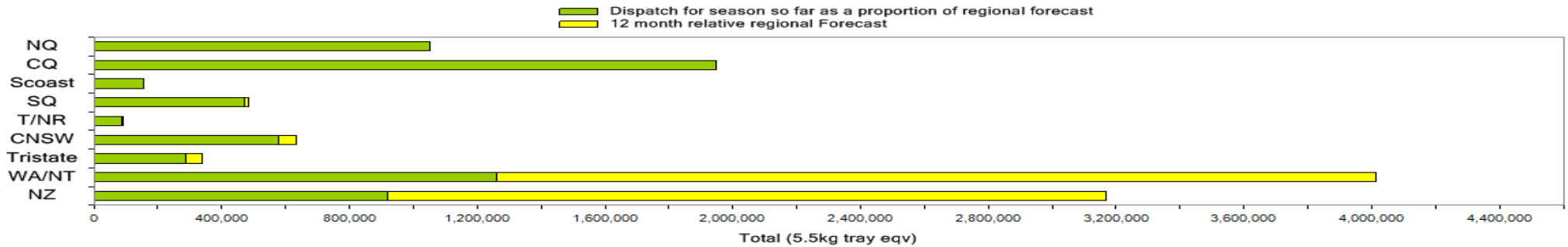
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP			11					3,680	3,691	510				4,618
NSW	854	4,962	10,720	29,911	22,319	20,389	7,042	7,251	103,448	4,422				111,488
QLD	320	5,543	11,475	24,876	22,646	25,615	12,301	11,859	114,635	2,382	5,472	3	13,680	122,449
SA / NT	810	2,492	4,698	2,763	2,300	2,620	3,980	160	19,823	760	960			21,380
VIC	45	4,078	7,368	19,482	17,640	17,128	5,971	2,848	74,560	3,920				81,687
WA	61	654	759	1,636	2,711	5,814	5,645	160	17,440	1,412	441			20,087
Total	2,090	17,729	35,031	78,668	67,616	71,566	34,939	25,958	333,597	13,406	6,873	3	13,680	361,710

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 8,164,886 5.5kg tray eqv

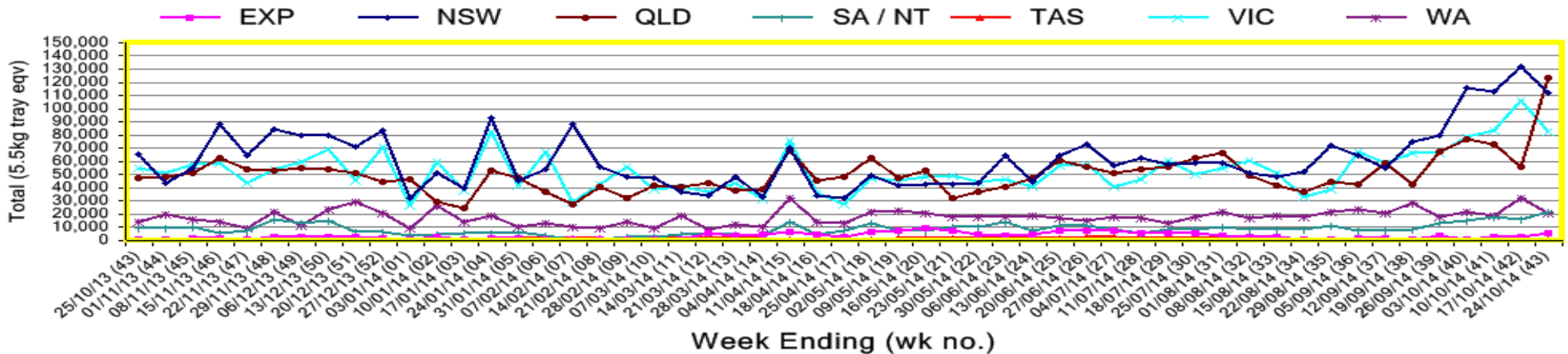


Yellow shading indicates forecast data							Green shading indicates dispatch data											
Forecast Data (Week 43 - 47)							Dispatch Data (Week 43 - begin 18/10/2014)											
Variety	Trays - Total	Bulk	P/Pk	Proc	Other	All - Total	Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv					
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv		5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays					
Week 43 - begin 18/10/2014							Hass	329,387	12,833	6,873		13,680	356,457					
Hass	266,162	15,856	8,000		10,000	298,264	Lamb Hass	2,033	189				2,377					
Reed	1,000	192		1,000		1,531	Reed	2,177	384		3		2,876					
Week Total	267,162	16,048	8,000	1,000	10,000	299,795	Total	333,597	13,406	6,873	3	13,680	361,710					
Week 44 - begin 25/10/2014							Dispatch vs weekly forecast - all varieties and all packs (31st May 2014 to 21st November 2014)											
Hass	276,650	15,030	6,000		5,000	305,977												
Lamb Hass	720	88				880	<p>Total (5.5kg tray eqv)</p> <p>Week Start Date</p> <p>Legend: Forecast (Yellow), Dispatch (Green)</p>											
Reed	2,000	350		800		2,781												
Wurtz	1,000	100		500		1,273												
Week Total	280,370	15,568	6,000	1,300	5,000	310,911												
Week 45 - begin 01/11/2014							New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015											
Hass	260,222	13,555	6,000		5,000	286,867	Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date	
Lamb Hass	1,520	128				1,753	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	
Reed	2,000	350		800		2,781	Australia (from Infocado)	123,747	293,918	500,833							918,498	
Week Total	263,742	14,033	6,000	800	5,000	291,402	USA ¹	6	12,687	38,006							50,700	
Week 46 - begin 08/11/2014							Japan ¹	1,916	12,999	21,753								36,667
Hass	271,312	12,734	6,000		5,000	296,465	Other Asia ¹	7,609	43,179	68,125							118,913	
Lamb Hass	720	88				880	Total	133,278	320,156	628,717							1,124,778	
Reed	2,000	350		800		2,781	1 source: Statistics NZ adjusted for freight time to destination port. Source: Infoshare, NZ											
Week Total	274,032	13,172	6,000	800	5,000	300,126	3											
Week 47 - begin 15/11/2014																		
Hass	260,612	11,884	6,000		5,000	284,219												
Lamb Hass	720	88				880												
Reed	1,000	100				1,182												
Week Total	262,332	12,072	6,000		5,000	286,281												

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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 8,164,886 5.5kg tray eqv



Week 43 contributors - Packhouses

Natures Fruit Company (Consolidator)	Avonova (WA)
The Avolution (Consolidator)	Advance Packing & Marketing Services P/L (WA)
Avocado Industry Council (NZAGA)	Delroy Orchards (WA)
Golden Hill Packing Pty Ltd (TRI)	Simpson Farms Pty Ltd (WA)
Bonyaricall Vineyards (TRI)	Mariners Rest (WA)
Ashbourne Hills Avocados (TRI)	CNSW: Less than 3 contributors
Simpson Farms Pty Ltd (TRI)	SQ: Less than 3 contributors
West Aussie Avos (WA)	TNR: Less than 3 contributors
Box Organics (WA)	

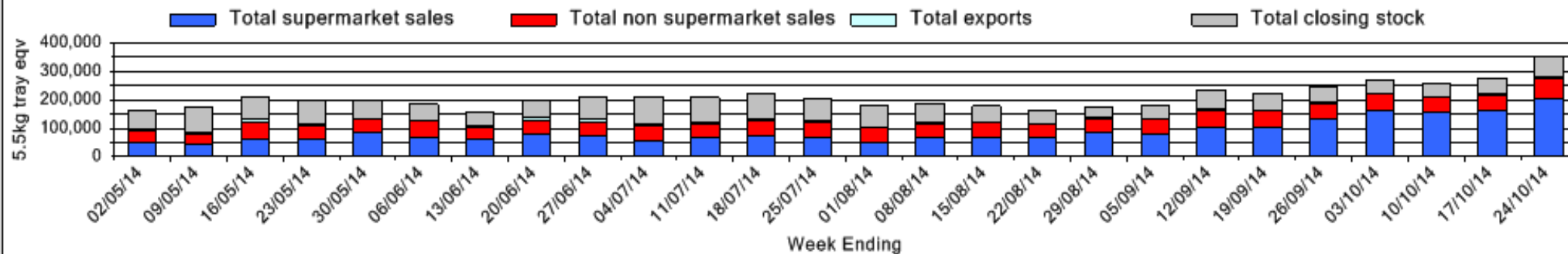
Week 43 contributors - Wholesalers

Allcrops Pty Ltd (Sydney)	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 (Brisbane)
Etherington (Perth)	The La Manna Group (Melbourne)
Exotic Fruit Traders (Sydney)	United Fresh (Adelaide)
Favco Queensland Pty Ltd (Brisbane)	WA Farm Direct (Perth)
Fresh Choice WA Pty Ltd (Perth)	

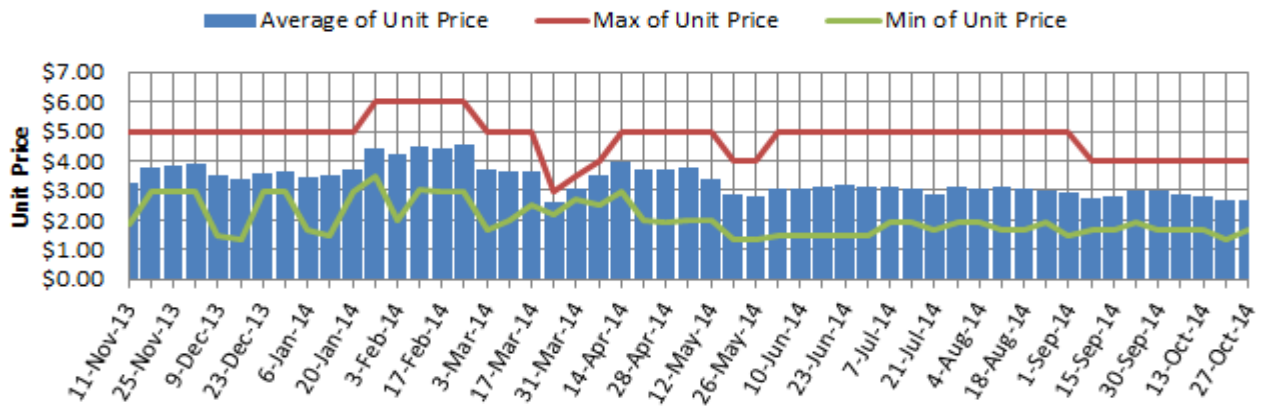
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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																		
Total supermarket sales	51,808		444	52,252	3,288			3,288	5,978						57,786		444	58,230
Total non supermarket sales	8,232			8,232	1,140			1,140	2,073						10,305			10,305
Total exports																		
Total sales	60,040		444	60,484	4,428			4,428	8,051						68,091		444	68,535
Total Stock on Hand	2,595			2,595	298			298	542						3,137			3,137
QLD																		
Total supermarket sales	56,165		304	56,469	1,440			1,440	2,618	3,360			3,360	611	59,394		304	59,698
Total non supermarket sales	19,271			19,271	460			460	836						20,107			20,107
Total exports																		
Total sales	75,436		304	75,740	1,900			1,900	3,455	3,360			3,360	611	79,501		304	79,805
Total Stock on Hand	21,915			21,915	207			207	376						22,291			22,291
SA & TAS																		
Total supermarket sales	25,032			25,032	576			576	1,047						26,079			26,079
Total non supermarket sales	7,719		185	7,904	2,688			2,688	4,887						12,606		185	12,791
Total exports																		
Total sales	32,751		185	32,936	3,264			3,264	5,935						38,686		185	38,871
Total Stock on Hand	18,256		695	18,951	1,289			1,289	2,344						20,600		695	21,295
VIC																		
Total supermarket sales	44,152			44,152	2,503			2,503	4,551						48,703			48,703
Total non supermarket sales	19,962		102	20,064	514		3	517	940	119			119	22	20,918		107	21,025
Total exports																		
Total sales	64,114		102	64,216	3,017		3	3,020	5,491	119			119	22	69,621		107	69,728
Total Stock on Hand	20,308			20,308	822			822	1,495	121			121	22	21,824			21,824
WA																		
Total supermarket sales	10,323			10,323	404			404	735	441			441	80	11,138			11,138
Total non supermarket sales	4,953			4,953	468		24	492	895						5,804		44	5,848
Total exports	3,691			3,691	510			510	927						4,618			4,618
Total sales	18,967			18,967	1,382		24	1,406	2,556	441			441	80	21,560		44	21,604
Total Stock on Hand	6,174			6,174	50			50	91						6,265			6,265
Total																		
Total supermarket sales	187,480		748	188,228	8,211			8,211	14,929	3,801			3,801	691	203,100		748	203,848
Total non supermarket sales	60,137		287	60,424	5,270		27	5,297	9,631	119			119	22	69,740		336	70,076
Total exports	3,691			3,691	510			510	927						4,618			4,618
Total sales	251,308		1,035	252,343	13,991		27	14,018	25,487	3,920			3,920	713	277,459		1,084	278,543
Total Stock on Hand	69,248		695	69,943	2,666			2,666	4,847	121			121	22	74,117		695	74,812

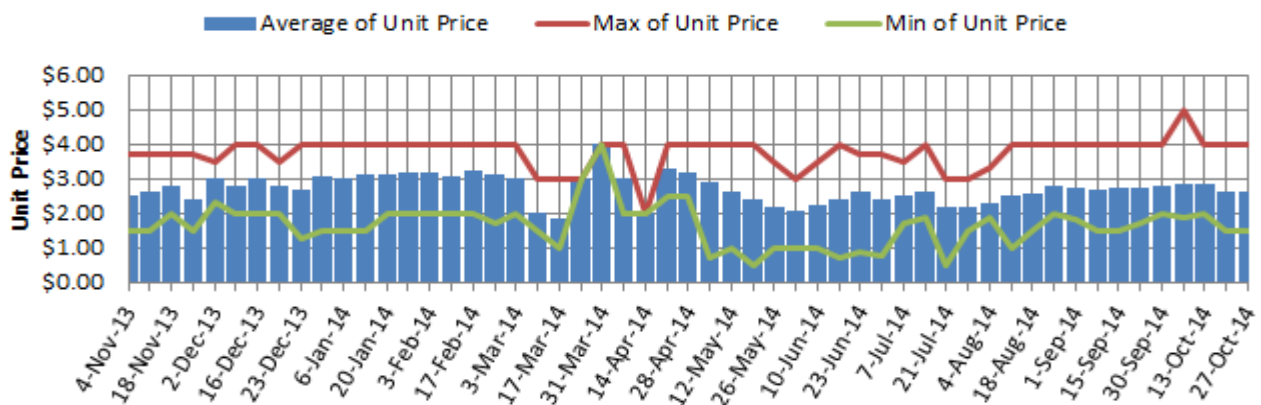
Weekly National Sales



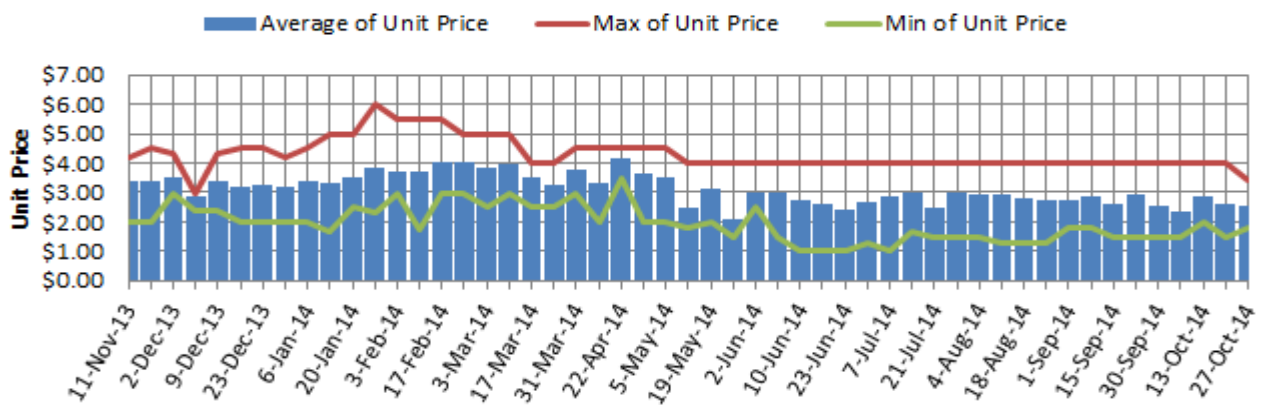
Hass Avocado Average Retail Prices - Sydney



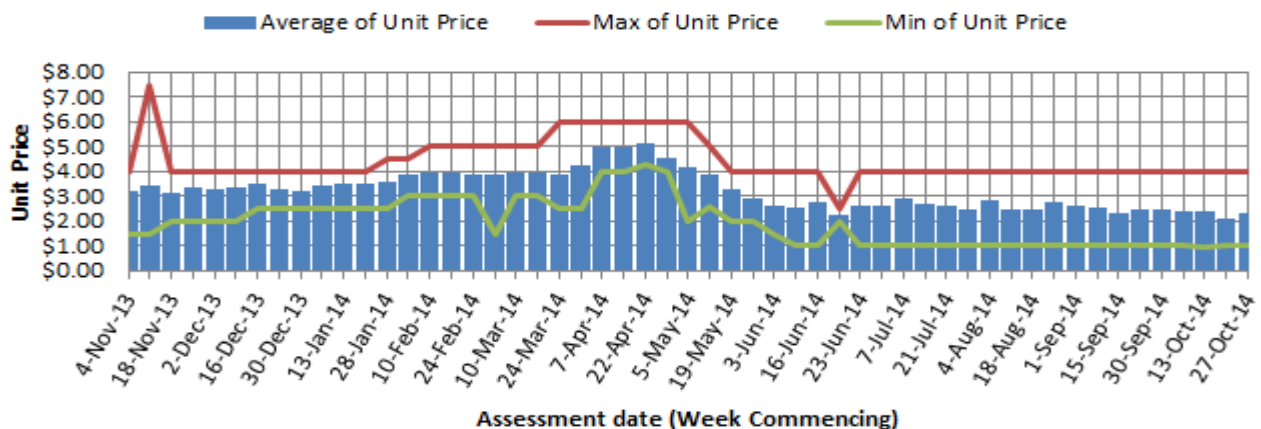
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

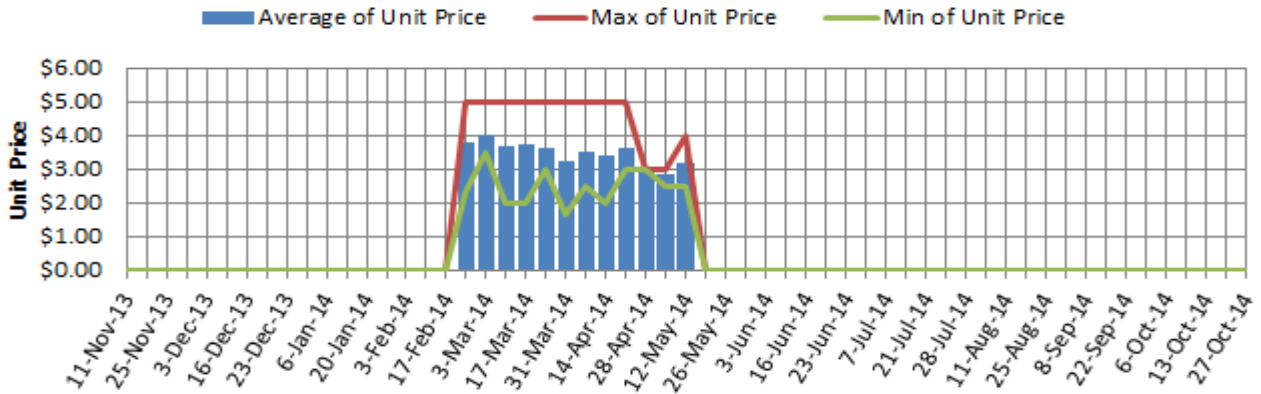


Hass Avocado Average Retail Prices - Perth

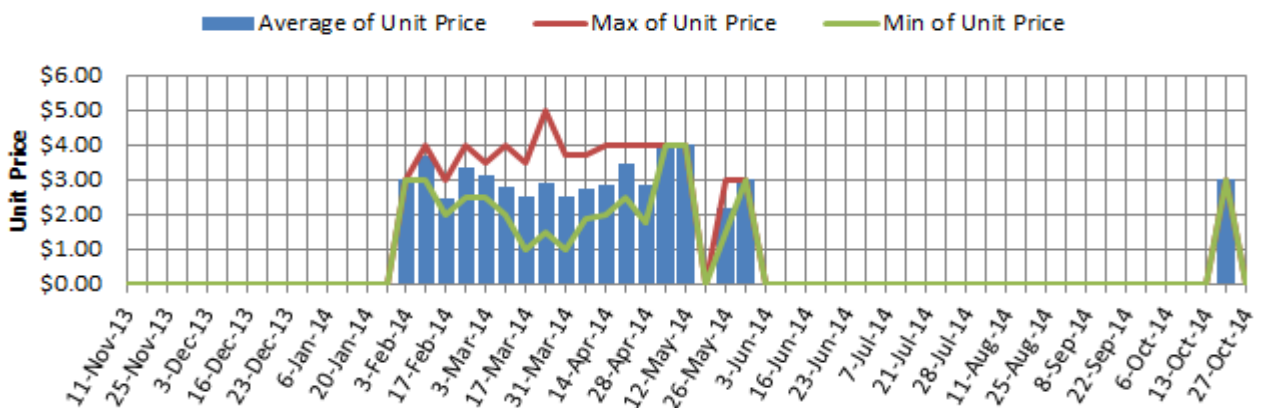


Assessment date (Week Commencing)

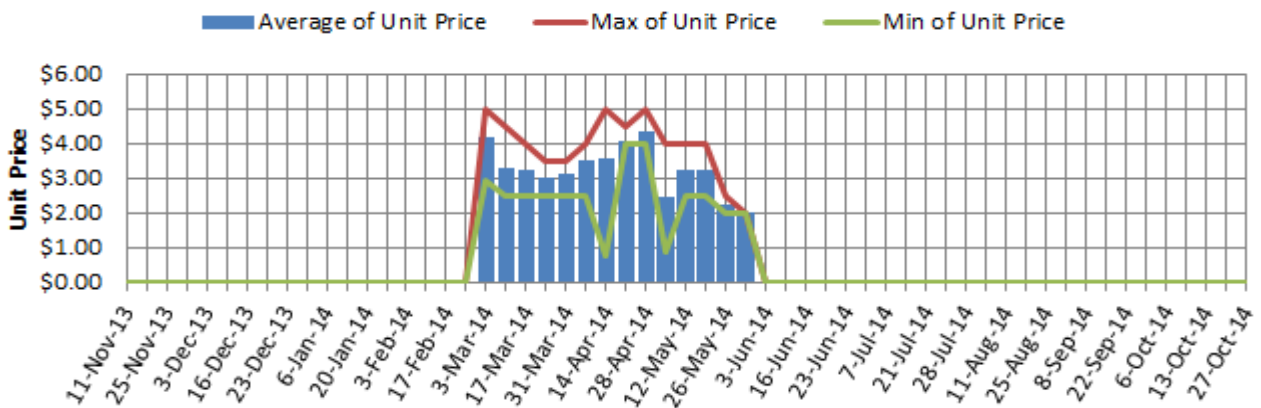
Shepard Avocado Average Retail Prices - Sydney



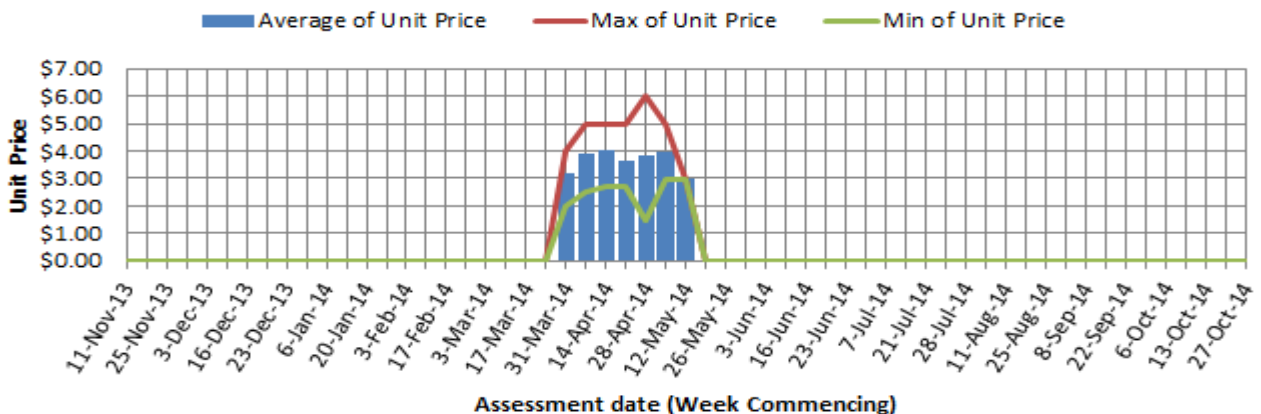
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 27th October 2014

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	270	1.70	Cat	Aus	Woolworths	Hass	300	1.98	Store	Aus
Woolworths	Hass	250	1.70	Cat	Aus	I	Hass	180	1.99	No	Aus
Woolworths	Hass	250	1.70	Cat	Aus	IS	Hass	220	1.99	No	NS
IGA	Hass	230	1.99	Store	NZ	I	Hass	210	2.29	No	NS
Coles	Hass	270	2.48	No	Aus	Coles	Hass	300	2.48	No	Aus
Coles	Hass	270	2.48	No	Aus	Coles	Hass	210	2.48	Store	Aus
Coles	Hass	280	2.48	No	Aus	Coles	Hass	280	2.48	Store	Aus
I	Hass	290	2.49	No	Aus	I	Hass	235	2.49	No	Aus
I	Hass	250	2.99	No	Aus	Woolworths	Hass	260	2.98	No	Aus
Foodworks	Hass	300	2.99	No	NZ	I	Hass	340	2.98	No	Aus
I	Hass	270	2.99	No	Aus	Woolworths	Hass	320	2.98	No	Aus
I	Hass	270	2.99	No	Aus	IGA	Hass	230	2.99	No	Aus
I	Hass	320	2.99	No	Aus	I	Hass	300	3.19	No	Aus
IGA	Hass	270	3.49	No	Aus	I	Hass	330	3.19	No	Aus
I	Hass	340	3.49	No	Mixed	I	Hass	270	3.39	No	Aus
I	Hass	300	3.99	No	Aus	PERTH					
Coles	Hass	270	4.00	No	Aus	IGA	Hass	135	0.99	No	Aus
Coles	Hass	270	4.00	No	Aus	IS	Hass	140	0.99	No	Aus
BRISBANE						I	Hass	130	1.28	No	Aus
I	Hass	240	1.50	Store	NZ	Coles	Hass	170	1.98	No	Aus
IGA	Hass	240	1.89	No	NZ	Coles	Hass	170	1.98	No	Aus
I	Hass	155	1.89	Store	Aus	Coles	Hass	190	1.98	No	Aus
I	Hass	175	1.99	No	NZ	Woolworths	Hass	205	2.48	No	Aus
Coles	Hass	200	2.48	No	NZ	Woolworths	Hass	210	2.48	No	Aus
Coles	Hass	300	2.48	No	NZ	Woolworths	Hass	210	2.48	Store	Aus
I	Hass	240	2.49	No	NZ	I	Hass	235	2.79	No	Aus
Woolworths	Hass	200	2.68	No	Aus	I	Hass	260	2.99	No	Aus
Woolworths	Hass	305	2.68	No	Aus	I	Hass	240	2.99	No	Aus
Woolworths	Hass	230	2.68	No	Aus	IGA	Hass	295	2.99	No	Aus
I	Hass	320	2.99	No	NZ	IGA	Hass	265	2.99	No	Aus
I	Reed	420	2.99	No	Aus	IGA	Hass	300	2.99	No	Aus
I	Hass	240	3.00	No	Aus	I	Hass	235	3.99	No	Aus
I	Hass	365	3.49	No	Aus						
I	Hass	240	3.50	No	Aus						
IGA	Hass	255	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