



INFOCADO WEEKLY REPORT: 1st — 7th November 2014 (Wk 45)



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Comments

- The weekly dispatch was comparable to the weekly forecast volume in the last week. The total number of dispatches has eased from past weeks with the four weekly forecast estimating this trend to continue over the next month (refer pg 3).
- Of course 5.5kg trays continue to dominate the market with minor volumes being dispatched as bulks, pre-packs & processing (refer pg 3).
- The WA & NZ harvests appear to be reaching 40% completion with large volumes forecast yet to be dispatched (refer pg 4).
- The average retail price per Hass avocado continues to ease across the major cities due to the increased volumes that have been available over the past few weeks. A range of store types continue to run specials encouraging volumes to move especially in Melbourne (refer pg 6 & 8).

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 Guacamole Enewsletter - 30/10/2014.

Upcoming Holidays

G20 Leaders' Summit (Brisbane Area): 14th Nov | Christmas Day: 25th Dec | Boxing Day: 26th Dec | New Year's Day: 1st Jan 2015 |

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:

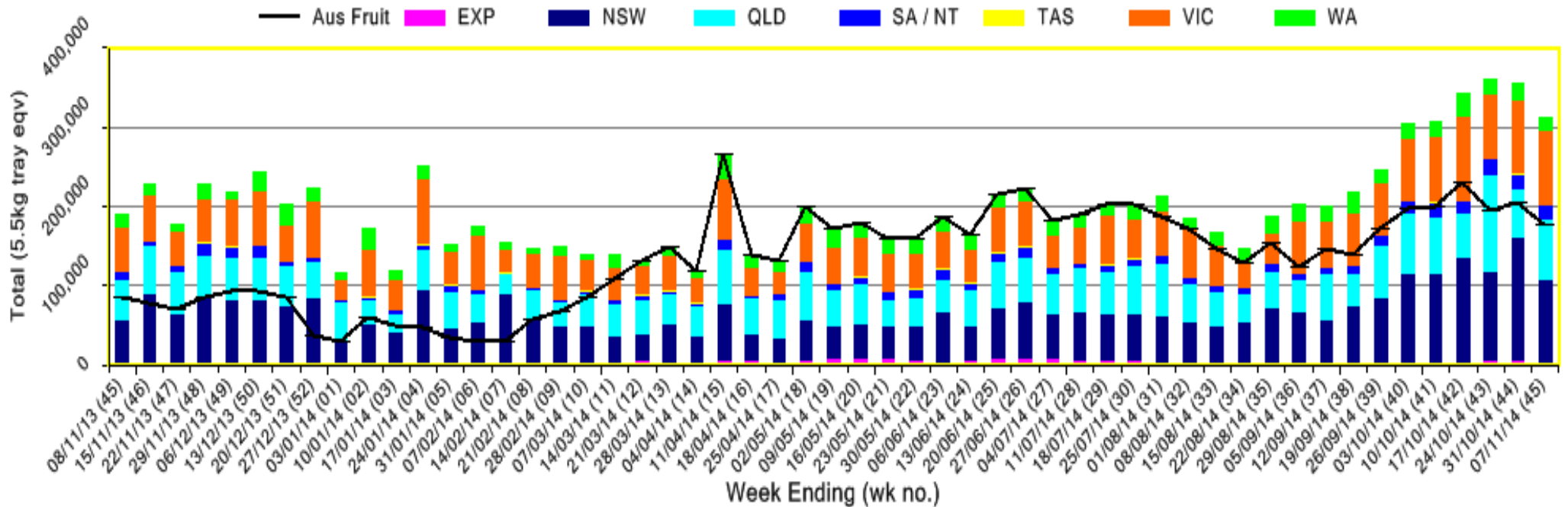
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 1st November - 7th November 2014 (Wk 45)

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	Oil	Proc	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP			20						2,240	2,260	576				3,307
NSW	518	2,841	11,146	26,565	74	18,670	22,455	6,940	4,989	94,198	4,241	3,960			102,629
QLD		3,321	8,355	17,012		12,321	15,989	8,819	7,848	73,665	768	8,736		3,800	77,340
SA / NT	180	1,850	2,223	3,603		558	538	7,018		15,970	792				17,410
VIC	466	4,819	8,948	21,429		21,045	18,626	5,931	4,750	86,014	4,094	456			93,541
WA	347	529	479	1,584		1,796	5,555	7,038	76	17,404	713	3,861	20		19,406
Total	1,511	13,360	31,171	70,193	74	54,390	63,163	35,746	19,903	289,511	11,184	17,013	20	3,800	313,634

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2014 to date = 8,835,141 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 45 - 49)

Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Kg	5.5Kg Eqv

Week 45 - begin 01/11/2014							
Hass	275,503	10,907	20,000	20		5,000	299,883
Lamb Hass	944	480					1,817
Reed	1,450	250			800		2,050
Week Total	277,897	11,637	20,000	20	800	5,000	303,749

Week 46 - begin 08/11/2014							
Hass	261,773	12,286	20,500	20	5,000		288,751
Lamb Hass	432	440					1,232
Reed	1,160	204				1,600	1,822
Week Total	263,365	12,930	20,500	20	5,000	1,600	291,805

Week 47 - begin 15/11/2014							
Hass	250,808	11,904	20,500	15	5,000		277,091
Lamb Hass	432	88					592
Reed	1,000	200			2,000	1,200	1,946
Week Total	252,240	12,192	20,500	15	7,000	1,200	279,628

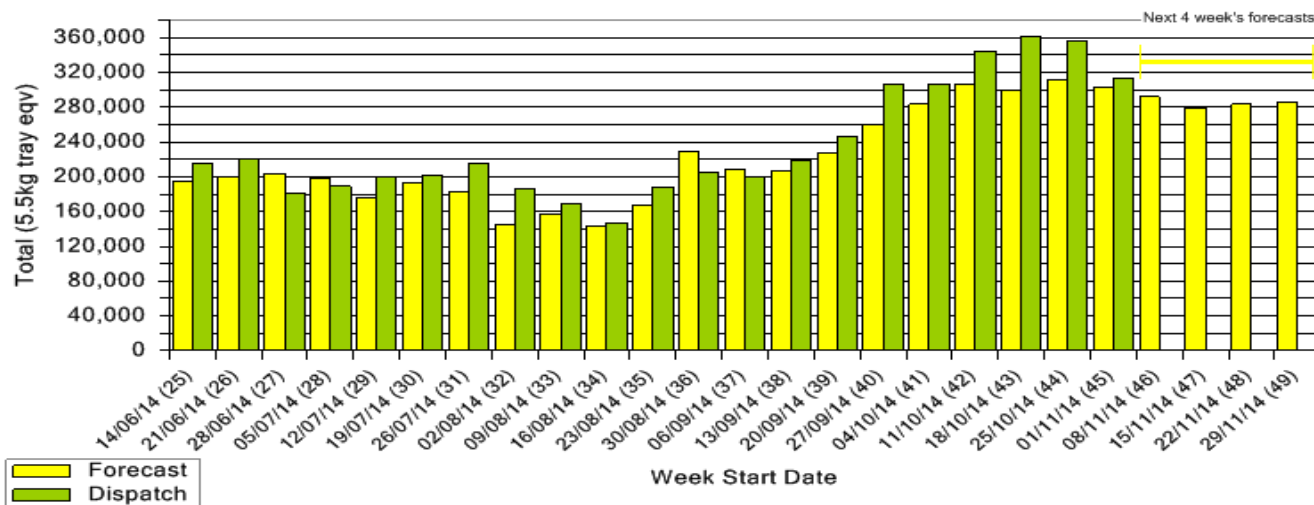
Week 48 - begin 22/11/2014							
Hass	259,653	8,806	20,500	20	5,000		280,304
Lamb Hass	432	440					1,232
Reed	1,000	200			2,000	2,000	2,092
Week Total	261,085	9,446	20,500	20	7,000	2,000	283,628

Week 49 - begin 29/11/2014							
Hass	259,055	10,427	20,500	20	5,000		282,653
Lamb Hass	432	88					592
Reed	1,000	200			2,000	2,000	2,092
Week Total	260,487	10,715	20,500	20	7,000	2,000	285,337

Dispatch Data (Week 45 - begin 1/11/2014)

Variety	Trays	Bulk	P/PK	Oil	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Hass	287,153	10,588	17,013	20	3,800	310,192
Lamb Hass	1,610	327				2,205
Reed	748	269				1,237
Total	289,511	11,184	17,013	20	3,800	313,634

Dispatch vs weekly forecast - all varieties and all packs (14th June 2014 to 5th December 2014)

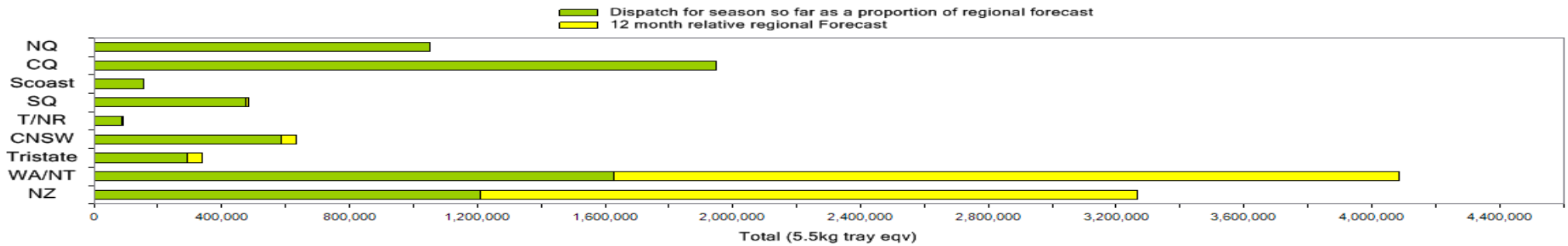


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

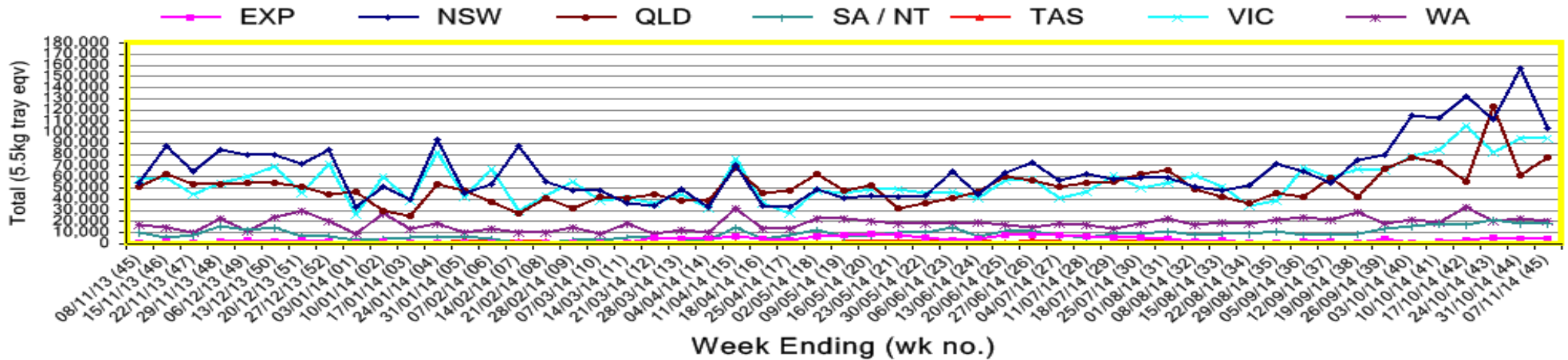
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	443,740	379,760	393,210	552,900	563,784	252,876	5,280	2,949,402
Australia (from Infocado)	123,747	293,918	653,001	137,400						1,208,066
USA¹	6	12,687	38,006							50,699
Japan¹	1,916	12,999	21,753							36,668
Other Asia¹	7,609	43,179	68,125							118,913
Total	133,278	362,783	780,885	137,400						1,414,346

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

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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 8,835,141 5.5kg tray eqv



Week 45 contributors - Packhouses

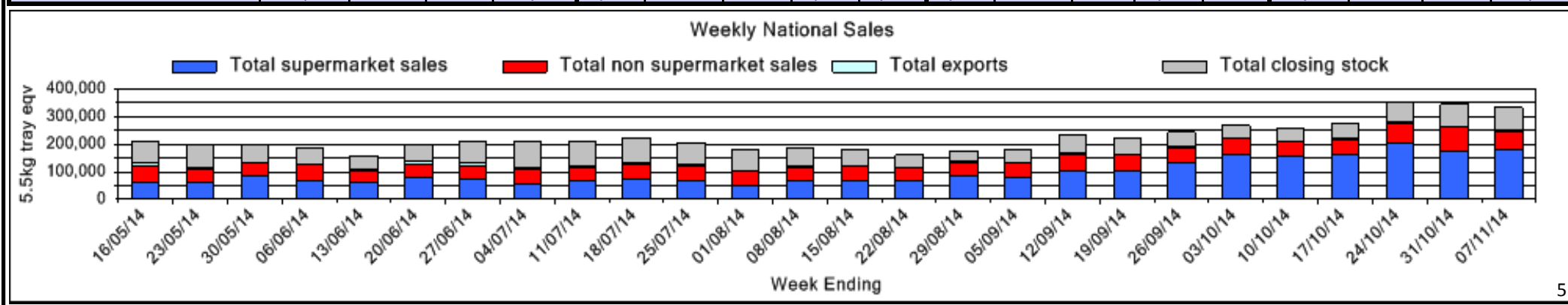
Natures Fruit Company (Consolidator)	Delroy Orchards (WA)
Simpson Farms Pty Ltd (Consolidator)	West Aussie Avos (WA)
The Avolution (Consolidator)	Avonova (WA)
Avocado Industry Council (NZAGA)	CNSW: Less than 3 contributors
Mariners Rest (WA)	CQ: Less than 3 contributors
Box Organics (WA)	SQ: Less than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

Week 45 contributors - Wholesalers

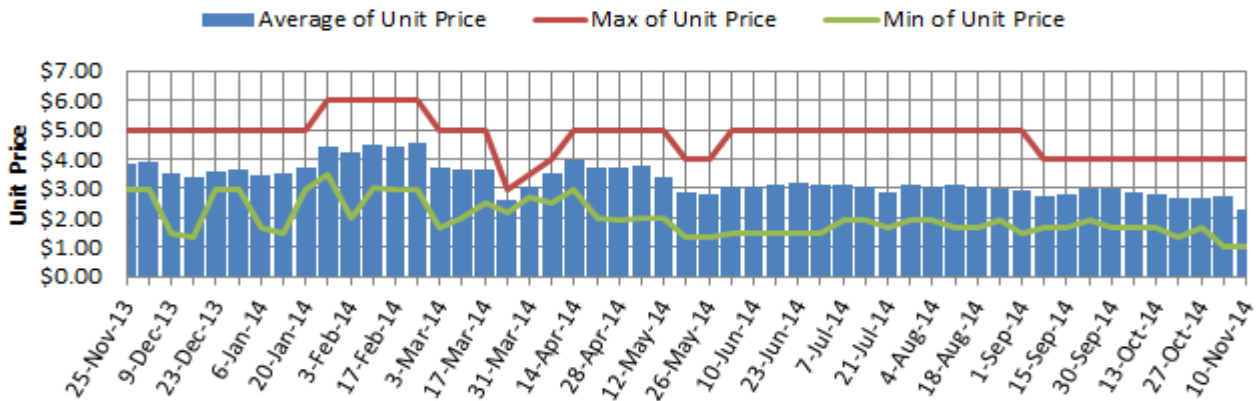
Allcrops Pty Ltd (Sydney)	Murray Bros (Brisbane)
C & S Ponte Produce Pty Ltd (Melbourne)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Adelaide)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Brisbane)	The La Manna Group (Adelaide)
Costa Farms (Melbourne)	The La Manna Group (Brisbane)
Etherington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

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

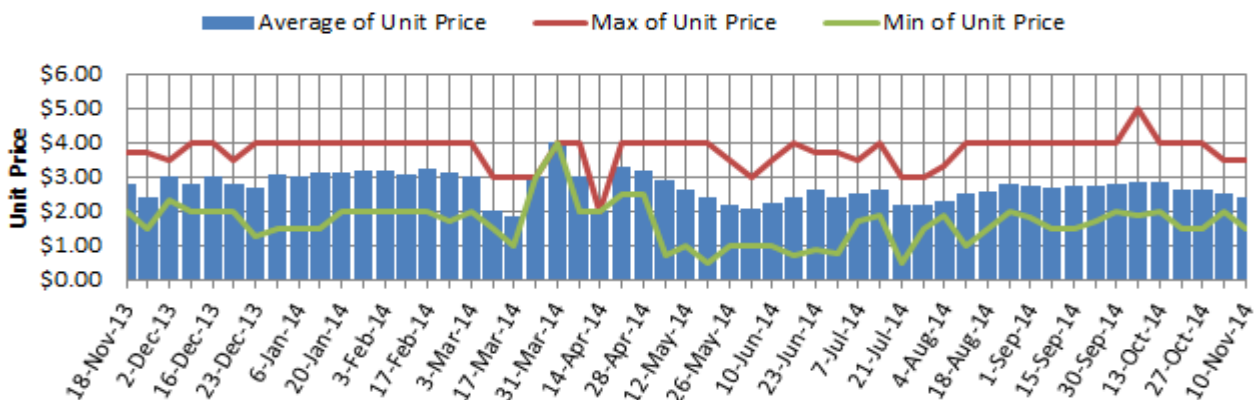
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	56,602			56,602	2,892			2,892	5,258						61,860			61,860
Total non supermarket sales	8,653			8,653	616			616	1,120						9,773			9,773
Total exports																		
Total sales	65,255			65,255	3,508			3,508	6,378						71,633			71,633
Total Stock on Hand	4,455			4,455	184			184	335						4,790			4,790
QLD																		
Total supermarket sales	31,434			31,434	576			576	1,047	8,736			8,736	1,588	34,070			34,070
Total non supermarket sales	18,482		594	19,076	1,099			1,099	1,998						20,480		594	21,074
Total exports																		
Total sales	49,916		594	50,510	1,675			1,675	3,045	8,736			8,736	1,588	54,550		594	55,144
Total Stock on Hand	15,735		107	15,842	156			156	284						16,019		107	16,126
SA & TAS																		
Total supermarket sales	22,675			22,675	192			192	349						23,024			23,024
Total non supermarket sales	6,758		373	7,131	853			853	1,551						8,309		373	8,682
Total exports																		
Total sales	29,433		373	29,806	1,045			1,045	1,900						31,333		373	31,706
Total Stock on Hand	23,880		342	24,222	2,275			2,275	4,136						28,016		342	28,358
VIC																		
Total supermarket sales	40,238		114	40,352	2,786			2,786	5,065						45,303		114	45,417
Total non supermarket sales	13,248		813	14,061	4,259		473	4,732	8,604	157			157	29	21,020		1,673	22,693
Total exports																		
Total sales	53,486		927	54,413	7,045		473	7,518	13,669	157			157	29	66,324		1,787	68,111
Total Stock on Hand	17,891		306	18,197	4,492		56	4,548	8,269	1,065			1,065	194	26,252		408	26,660
WA																		
Total supermarket sales	14,220			14,220	181			181	329	561			561	102	14,651			14,651
Total non supermarket sales	4,971			4,971	962			962	1,749	81			81	15	6,735			6,735
Total exports	2,260			2,260	576			576	1,047						3,307			3,307
Total sales	21,451			21,451	1,719			1,719	3,125	642			642	117	24,693			24,693
Total Stock on Hand	4,841			4,841	874			874	1,589	468			468	85	6,515			6,515
Total																		
Total supermarket sales	165,169		114	165,283	6,627			6,627	12,049	9,297			9,297	1,690	178,908		114	179,022
Total non supermarket sales	52,112		1,780	53,892	7,789		473	8,262	15,022	238			238	43	66,317		2,640	68,957
Total exports	2,260			2,260	576			576	1,047						3,307			3,307
Total sales	219,541		1,894	221,435	14,992		473	15,465	28,118	9,535			9,535	1,734	248,533		2,754	251,287
Total Stock on Hand	66,802		755	67,557	7,981		56	8,037	14,613	1,533			1,533	279	81,592		857	82,448



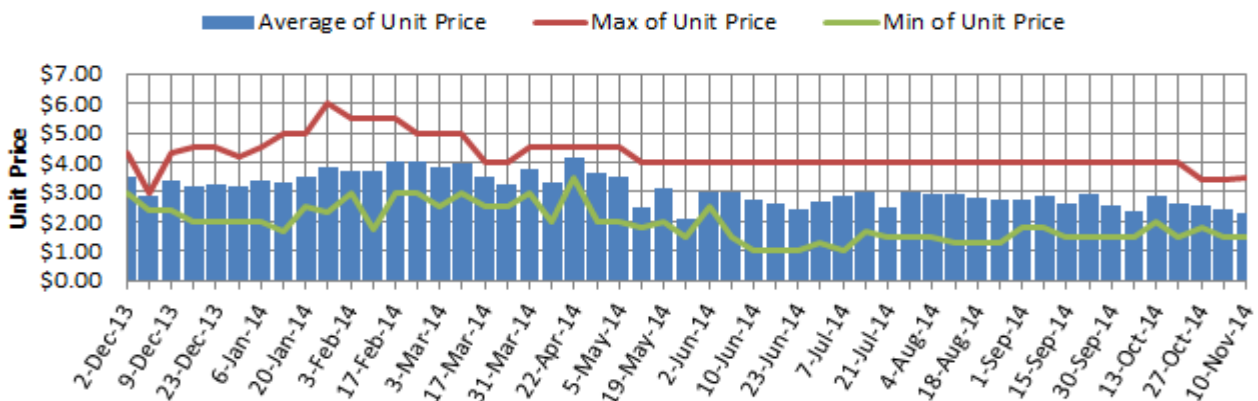
Hass Avocado Average Retail Prices - Sydney



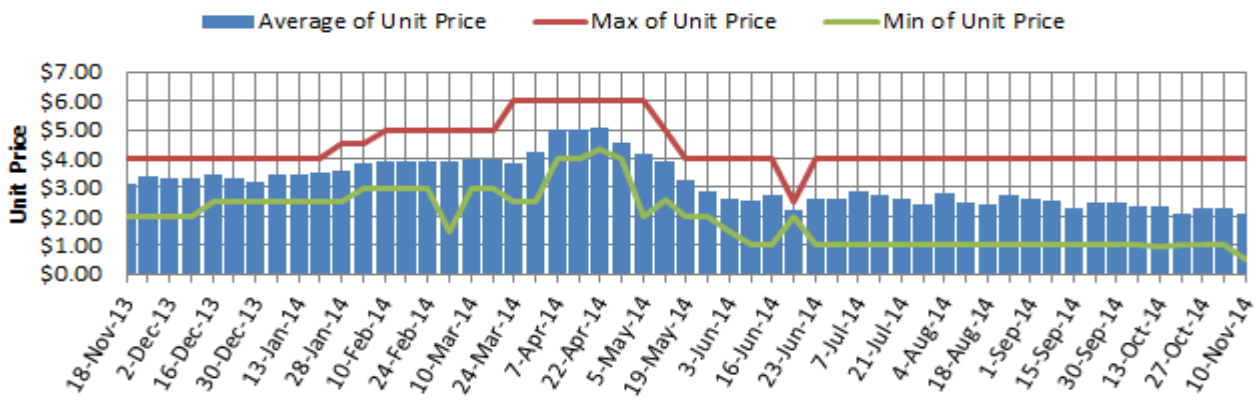
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

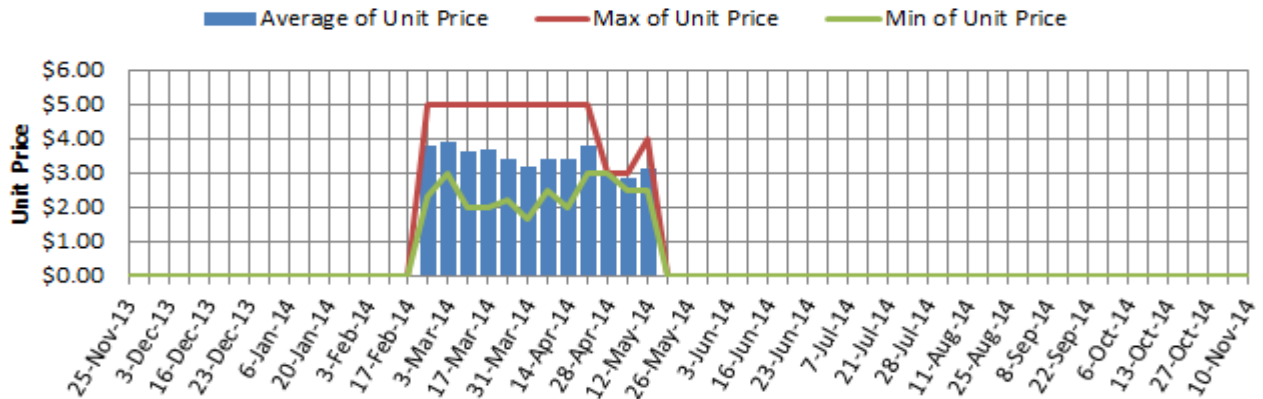


Hass Avocado Average Retail Prices - Perth

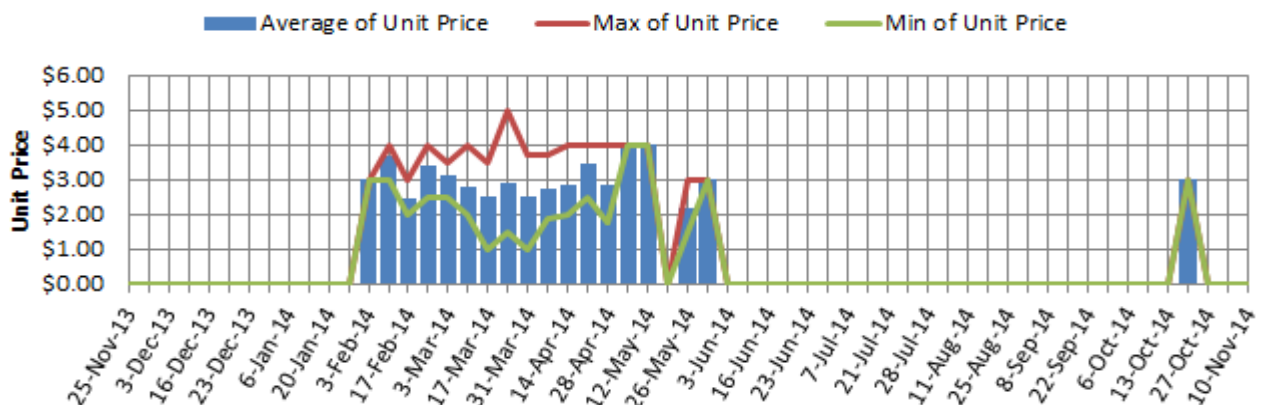


Assessment date (Week Commencing)

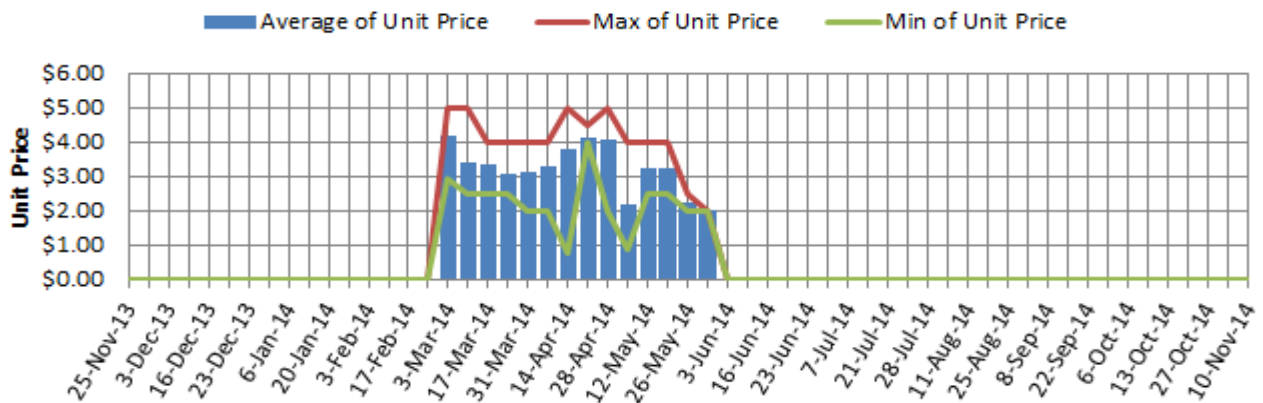
Shepard Avocado Average Retail Prices - Sydney



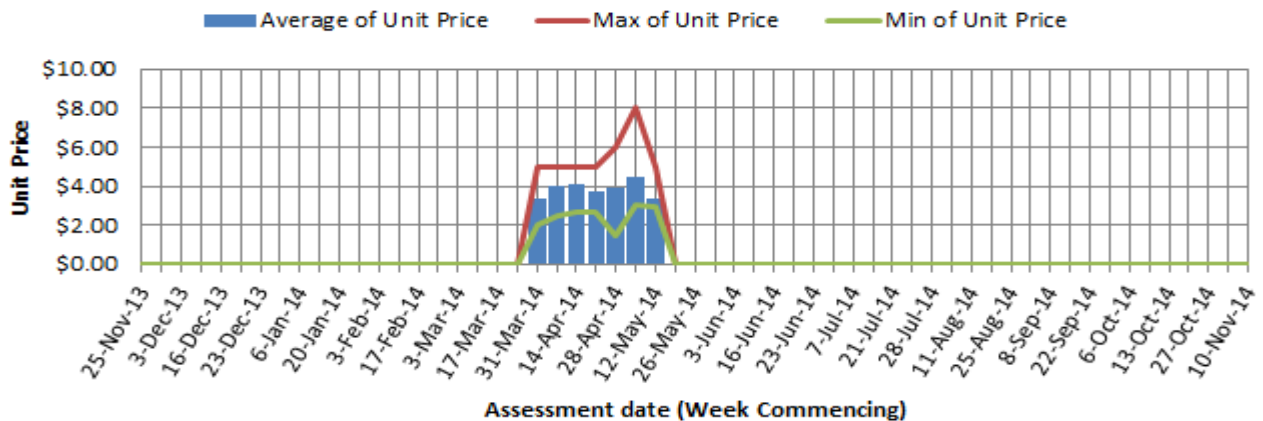
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 10th November 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
IGA	Hass	230	1.69	Store	NZ
Woolworths	Hass	290	1.88	Cat	Aus
Woolworths	Hass	280	1.88	Cat	Aus
Woolworths	Hass	270	1.88	Cat	Aus
I	Reed	420	1.99	No	Aus
Coles	Hass	230	2.00	Cat	Aus
Coles	Hass	280	2.00	No	Aus
Coles	Hass	250	2.00	No	Aus
I	Hass	260	2.00	No	Aus
I	Hass	300	2.00	Store	NZ
I	Hass	240	2.50	No	Aus
I	Hass	310	2.50	No	Aus
I	Hass	310	2.50	No	NZ
Foodworks	Hass	300	2.69	No	NZ
I	Hass	260	2.99	No	Aus
IGA	Hass	240	3.49	No	Aus
I	Hass	300	3.99	No	Aus
BRISBANE					
I	Hass	200	1.50	Store	NZ
Woolworths	Hass	200	1.88	No	Aus
Woolworths	Hass	275	1.88	No	Aus
Woolworths	Hass	305	1.88	No	Aus
I	Hass	195	1.99	No	Aus
I	Hass	290	1.99	No	NZ
I	Hass	220	1.99	No	NZ
IGA	Hass	230	1.99	No	NZ
Coles	Hass	240	2.68	No	NZ
IGA	Hass	342	2.99	No	Aus
I	Hass	350	2.99	No	Aus
I	Hass	290	3.00	No	Aus
IGA	Hass	230	3.00	No	NZ
I	Hass	265	3.50	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
Woolworths	Hass	280	1.88	Store	Aus
Woolworths	Hass	270	1.88	Store	Aus
Woolworths	Hass	310	1.88	Store	Aus
Coles	Hass	250	1.98	Store	Aus
Coles	Hass	220	1.98	Store	Aus
Coles	Hass	220	1.98	Store	Aus
I	Hass	190	1.99	No	Aus
IGA	Hass	250	1.99	No	Aus
IS	Hass	260	1.99	No	Aus
I	Hass	370	2.19	Store	Aus
I	Hass	250	2.29	No	NZ
I	Hass	270	2.49	No	Aus
I	Hass	270	2.49	No	Aus
I	Hass	305	2.98	Store	Aus
I	Hass	350	2.99	Store	Aus
I	Hass	325	3.39	No	Aus
PERTH					
I	Hass	155	0.50	No	Aus
IGA	Hass	150	1.49	No	Aus
IS	Hass	260	1.50	No	Aus
Woolworths	Hass	200	1.88	No	Aus
Woolworths	Hass	200	1.88	Store	Aus
Woolworths	Hass	205	1.88	Store	Aus
I	Hass	235	1.99	No	Aus
I	Hass	230	1.99	No	Aus
Coles	Hass	205	2.00	No	Aus
Coles	Hass	180	2.00	No	Aus
Coles	Hass	210	2.00	No	Aus
IGA	Hass	285	2.99	No	Aus
IGA	Hass	215	2.99	No	Aus
IGA	Hass	260	2.99	No	Aus
I	Hass	260	2.99	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