



INFOCADO WEEKLY REPORT: 9th — 15th November 2013 (Wk 46)



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Comments

- Retail prices this week peaked at a Sydney independent stores at \$4.99. Perth Woolworths stores have a catalogue special in place this week for \$2.40. We have been making some upgrades to the retail price collection system and unfortunately through this process some entries for Brisbane and Melbourne are not available. We apologise for any inconvenience caused. We envisage that the issue will be resolved for next week's report.
- Last week key industry representatives gathered in Brisbane for a workshop to progress the development of a new Avocado Industry Export Plan. Exporters, state and federal government representatives as well as staff from Horticulture Australia Ltd (HAL) and Avocados Australia attended the day. This project has been funded through HAL using avocado levies and the new plan is expected to be completed in early 2014.
- The Qualicado workshops in Melbourne and Robinvale went off with a bang last week with some people traveling long distances to attend. We've had very positive feedback about both days and all presentations from the workshops will soon be uploaded to the Best Practice Resource for all industry members to access. Thank you to everyone who took the time to attend the events.

What you need to be aware of for next month

- The October 2013 Quarterly Report forecasts a total of 448,679 5.5kg eqv trays in the market place for December.
- The well known Aussie icon VEGEMITE has been reconnecting with Australians through the launch of its "START WITH VEGEMITE campaign", which is designed to remind Australians that VEGEMITE spread provides a nutritious and delicious start to the day. The campaign has opened the lid on a world of ways to start with VEGEMITE, by showing Australians that they don't have to stop at toast when they start with VEGEMITE spread, rather it can be the building block to create a range of simple, tasty and healthy breakfast options. One of those healthy breakfast options strongly promoted by Vegemite in their advertising has been Avocado. A specific 30 second television commercial featuring generous slices of Avocado on toast with Vegemite has been on air nationally since June (go to www.vegemite.com.au to see the ad). This has also been supported by shopperlites across 350 locations for four weeks during October and radio supporting a Coles Breakfast event also featuring Avocado. Also October 25th saw VEGEMITE's celebrate its 90th birthday with a successful social media campaign throughout the month encouraging all Australians to start with VEGEMITE and share their breakfast with the nation using #Vegemite90, actively encouraging consumers to try Vegemite with Avocado.

Upcoming Holidays

Christmas Day: 25th December | Boxing Day: 26th December

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IMPORTANT and PLEASE NOTE:

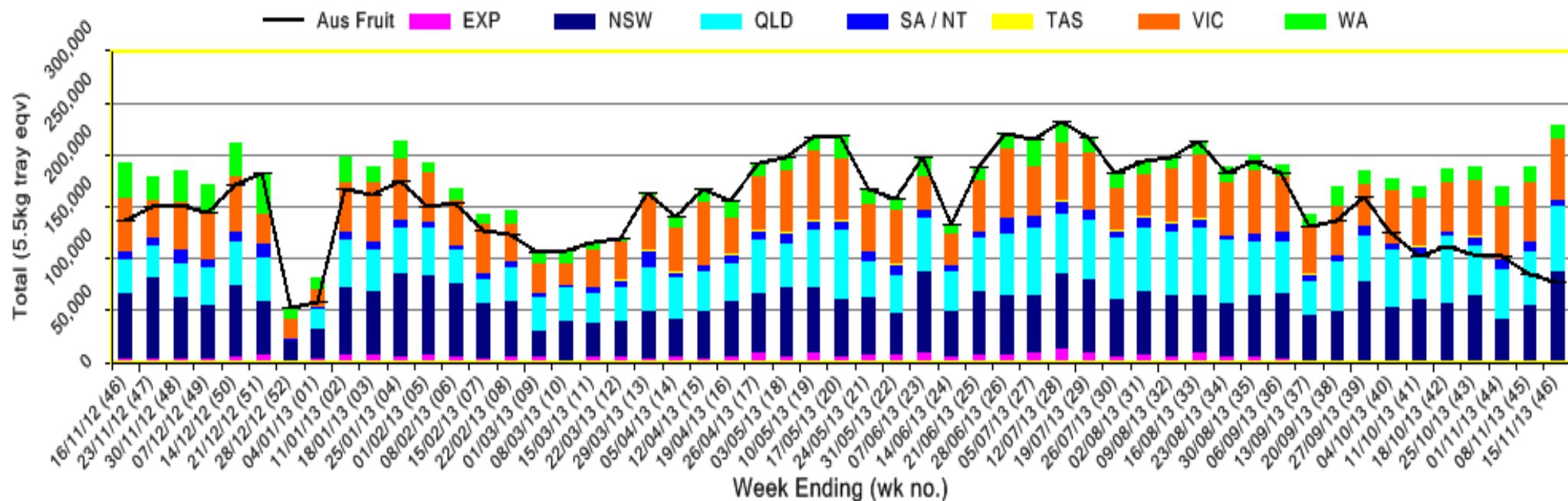
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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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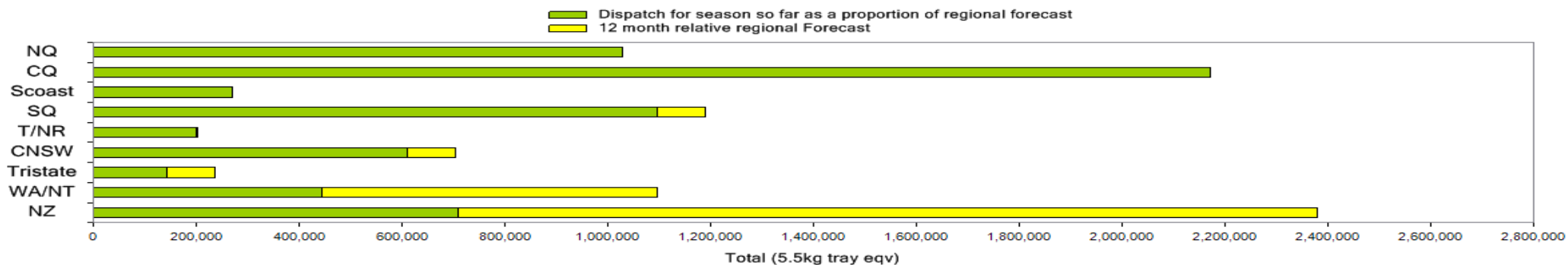
Industry Dispatches By Destination State and Count Size : 9th November - 15th November 2013 (Wk 46)

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								41	759	800	192				1,149
NSW	84	3,127	8,197	13,948		14,467	19,284	10,057	11,846	81,010	3,449		309		87,337
QLD		1,107	4,360	10,397	209	11,151	14,085	8,046	9,080	58,435	1,759	480	1	2,280	62,135
SA / NT		31	518	1,038		1,710	1,013	510	28	4,848	234		96		5,290
TAS							464			464					464
VIC	388	1,366	5,686	12,910		11,794	11,681	5,596	5,595	55,016	1,449	3,240	384		58,310
WA	44	130	457	2,362		5,665	2,255	685		11,598	1,152		288		13,745
Total	516	5,761	19,218	40,655	209	44,787	48,782	24,935	27,308	212,171	8,235	3,720	1,078	2,280	228,431

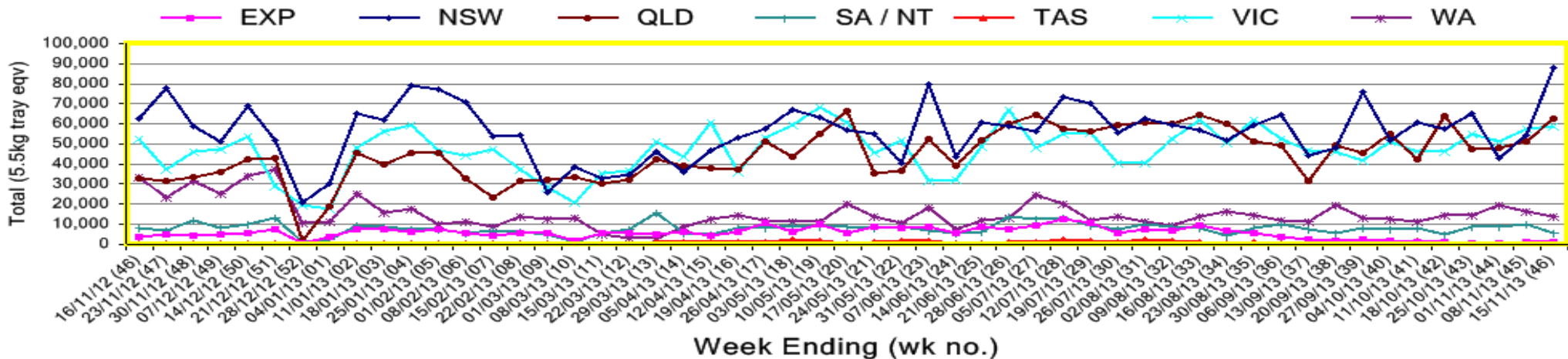
Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2013 to date = 8,113,467 5.5kg tray eqv



Percentage dispatched by region (Based on seasonal forecast - 2013)



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 8,113,467 5.5kg tray eqv



Week 46 contributors - Packhouses

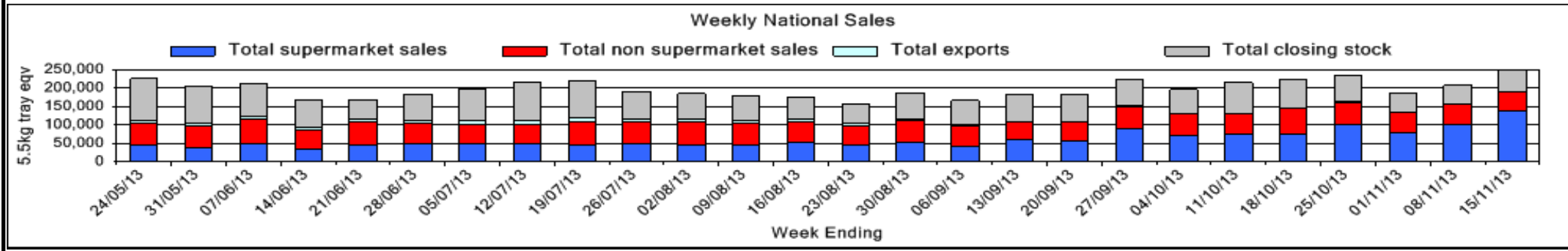
Natures Fruit Company (Consolidator)	Sunnyspot Packhouse Pty Ltd (SQ)
One Harvest (Consolidator)	Golden Hill Packing Pty Ltd (TRI)
Sunfresh (Consolidator)	KV & JM Lehmann (TRI)
The Avolution (Consolidator)	Chislett Developments Pty Ltd (TRI)
Midcoast Avocados (CNSW)	Green Pear Avocado (WA)
Coastal Avocados (CNSW)	Advance Packing & Marketing Services P/L (WA)
Avocado Industry Council (NZAGA)	Delroy Orchards (WA)
Green Nugget Orchards (SQ)	Avonova (WA)
Wodonga Park Fruit and Nuts (SQ)	TAM/NR: Less than 3 contributors

Week 46 contributors - Wholesalers

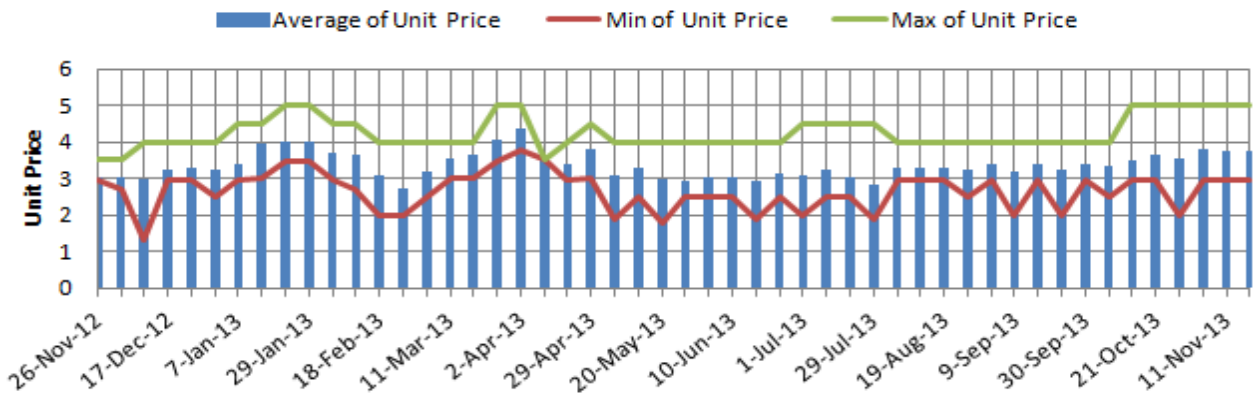
Allcrops Pty Ltd (Sydney)	Fresh Express Produce Pty Ltd (Perth)
C & S Ponte Produce Pty Ltd (Melbourne)	Murray Bros (Brisbane)
Costa Farms (Adelaide)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Melbourne)	The La Manna Group (Adelaide)
Costa Farms (Perth)	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)	

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

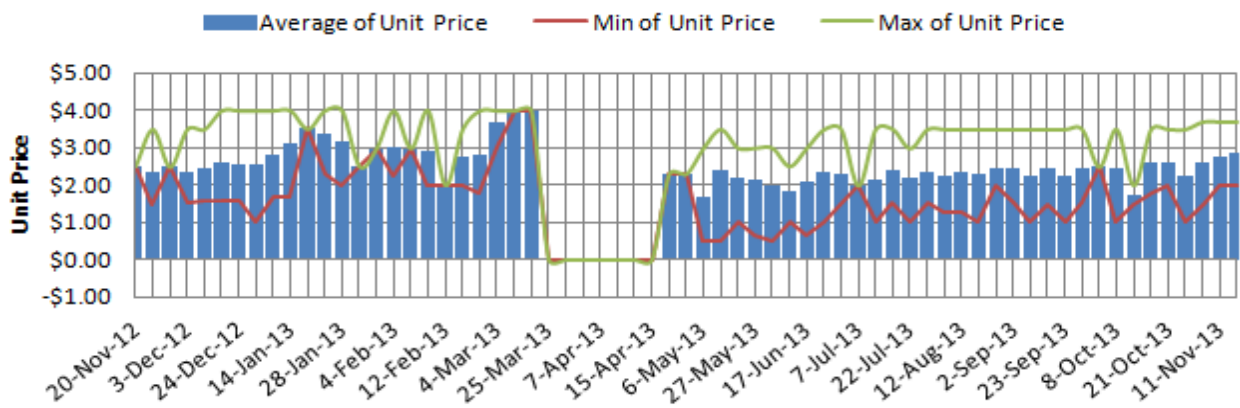
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	45,476			45,476	493			493	896						46,372			46,372
Total non supermarket sales	5,795		347	6,142	1,936			1,936	3,520						9,315		347	9,662
Total exports																		
Total sales	51,271		347	51,618	2,429			2,429	4,416						55,688		347	56,034
Total Stock on Hand	1,395		95	1,490	326			326	593						1,988		95	2,083
QLD																		
Total supermarket sales	38,654			38,654	288			288	524	480			480	87	39,265			39,265
Total non supermarket sales	14,439		54	14,493	669		6	675	1,227						15,655		65	15,720
Total exports																		
Total sales	53,093		54	53,147	957		6	963	1,751	480			480	87	54,920		65	54,985
Total Stock on Hand	18,825			18,825	125			125	227						19,052			19,052
SA & TAS																		
Total supermarket sales	9,973			9,973	96			96	175						10,148			10,148
Total non supermarket sales	6,663		480	7,143	568		235	803	1,460						7,696		907	8,603
Total exports																		
Total sales	16,636		480	17,116	664		235	899	1,635						17,843		907	18,751
Total Stock on Hand	13,254		5	13,259	187		4	191	347						13,594		12	13,606
VIC																		
Total supermarket sales	29,903			29,903	192			192	349	2,880			2,880	524	30,776			30,776
Total non supermarket sales	6,577		849	7,426	1,338		96	1,434	2,607						9,010		1,024	10,033
Total exports																		
Total sales	36,480		849	37,329	1,530		96	1,626	2,956	2,880			2,880	524	39,785		1,024	40,809
Total Stock on Hand	11,629		159	11,788	1,211			1,211	2,202	14			14	3	13,833		159	13,992
WA																		
Total supermarket sales	10,991			10,991	730			730	1,327						12,318			12,318
Total non supermarket sales	5,303	3		5,306	1,681		54	1,735	3,155						8,359	3	98	8,461
Total exports	800			800	192			192	349						1,149			1,149
Total sales	17,094	3		17,097	2,603		54	2,657	4,831						21,827	3	98	21,928
Total Stock on Hand	4,466			4,466	1,725			1,725	3,136						7,602			7,602
Total																		
Total supermarket sales	134,997			134,997	1,799			1,799	3,271	3,360			3,360	611	138,879			138,879
Total non supermarket sales	38,777	3	1,730	40,510	6,192		391	6,583	11,969						50,035	3	2,440	52,479
Total exports	800			800	192			192	349						1,149			1,149
Total sales	174,574	3	1,730	176,307	8,183		391	8,574	15,589	3,360			3,360	611	190,063	3	2,440	192,507
Total Stock on Hand	49,569		259	49,828	3,574		4	3,578	6,505	14			14	3	56,070		266	56,336



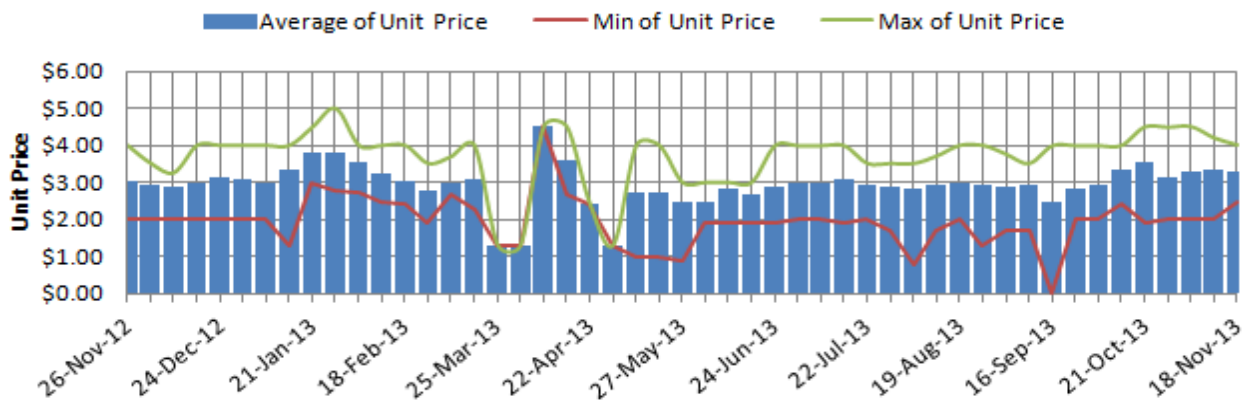
Hass Avocado Average Retail Prices - Sydney



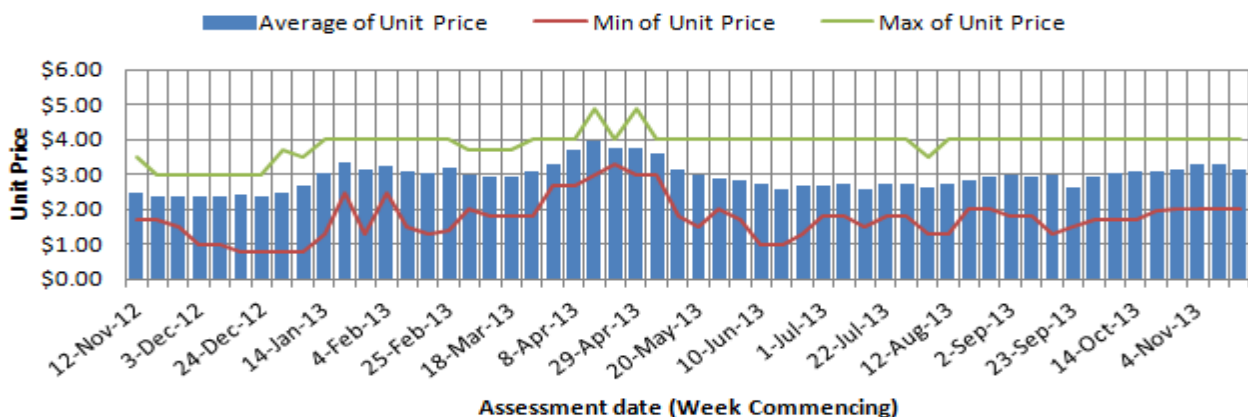
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

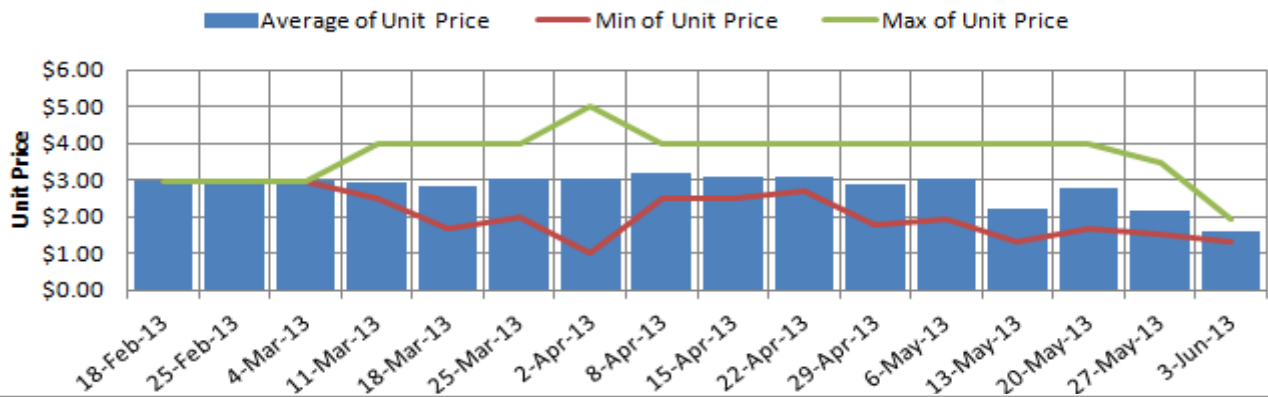


Hass Avocado Average Retail Prices - Perth

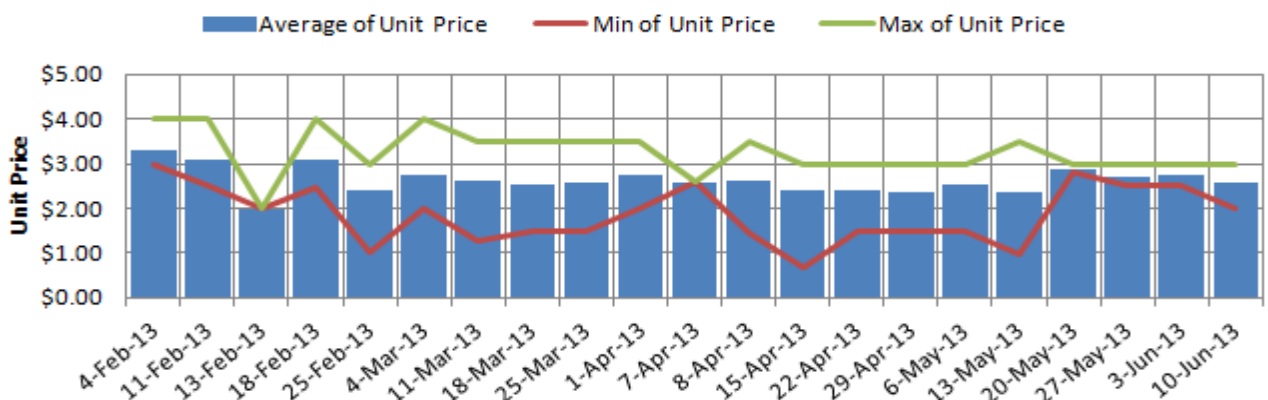


Assessment date (Week Commencing)

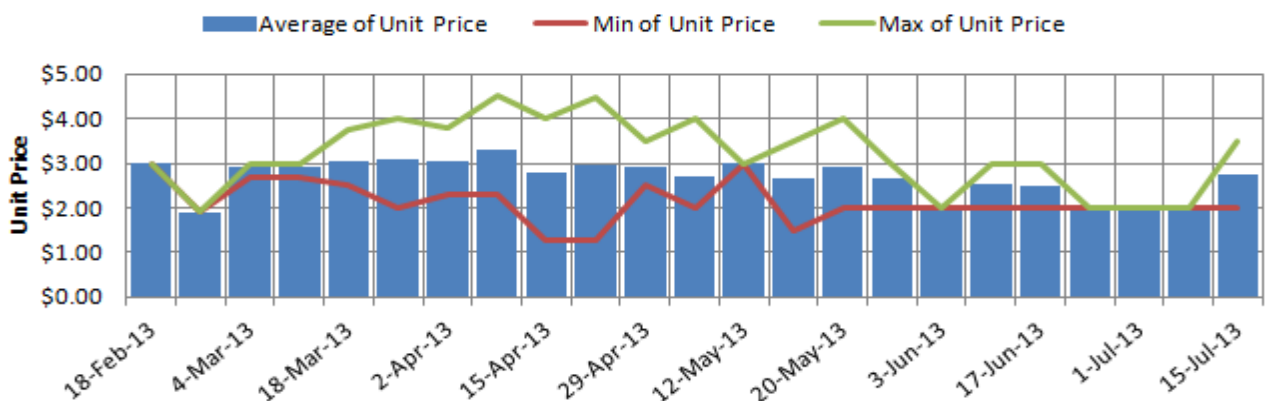
Shepard Avocado Average Retail Prices - Sydney



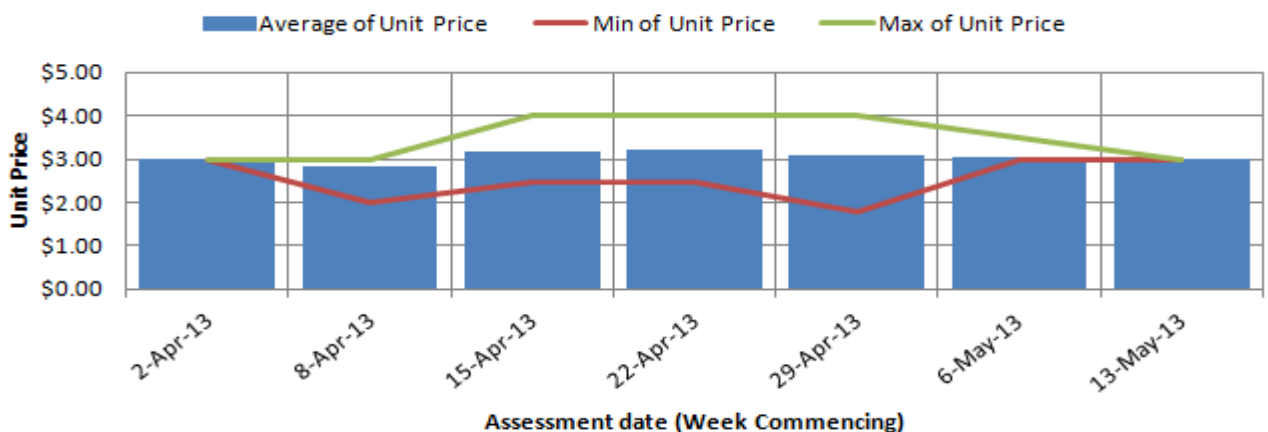
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 18th November 2013

StoreType	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY					
Coles	Hass	260	2.98	No	Aus
Woolworths	Hass	280	2.98	No	NZ
Coles	Hass	260	2.98	No	Mixed
Coles	Hass	270	2.98	No	Aus
Woolworths	Hass	250	2.98	No	NZ
Woolworths	Hass	240	2.98	No	NZ
IGA	Hass	260	3.50	No	Mixed
Foodworks	Hass	280	3.79	No	NZ
I	Hass	270	3.99	Store	NZ
I	Hass	260	3.99	No	Aus
IGA	Hass	260	3.99	No	NZ
I	Hass	260	3.99	No	Aus
I	Hass	270	3.99	No	Aus
I	Hass	310	4.99	No	Aus
I	Hass	290	4.99	No	Aus
I	Hass	290	4.99	No	Aus
BRISBANE					
IGA	Hass	190	1.99	No	NZ
IGA	Hass	220	1.99	No	Aus
I	Hass	180	1.99	No	Aus
Woolworths	Hass	220	2.48	No	NZ
Woolworths	Hass	200	2.98	No	Mixed
Coles	Hass	220	2.98	No	NZ
Coles	Hass	240	2.98	No	NZ
I	Hass	300	3.19	Store	NZ
I	Hass	200	3.50	Store	Aus
I	Hass	285	3.50	Store	Aus
I	Hass	296	3.69	Store	Aus

StoreType	Var	Av Wt (g)	Unit Price	Special	Country of Origin
MELBOURNE					
I	Hass	350	2.49	No	Aus
I	Hass	277	2.50	No	Aus
IGA	Hass	258	2.99	No	Aus
I	Hass	297	3.00	No	Aus
Woolworths	Hass	312	3.48	No	Mixed
Coles	Hass	249	3.48	No	Aus
Coles	Hass	296	3.48	No	Aus
Woolworths	Hass	265	3.48	No	Aus
Woolworths	Hass	298	3.48	No	NZ
Coles	Hass	289	3.50	No	Aus
I	Hass	248	3.50	No	Aus
I	Hass	275	4.00	No	Aus
PERTH					
IS	Hass	200	1.99	Store	NZ
I	Hass	220	2.00	No	NS
Woolworths	Hass	190	2.40	Cat	Aus
Woolworths	Hass	180	2.40	Cat	Aus
Woolworths	Hass	185	2.40	Cat	Aus
I	Hass	220	2.48	No	NS
I	Hass	295	2.98	No	Aus
IGA	Hass	270	2.99	No	NZ
I	Hass	245	2.99	No	Mixed
Coles	Hass	250	3.48	Store	Aus
Coles	Hass	230	3.48	No	Aus
Coles	Hass	235	3.48	No	Aus
IGA	Hass	260	3.49	No	Aus
IS	Hass	270	3.49	No	NZ
I	Hass	225	3.79	No	Aus
IGA	Hass	265	3.99	No	Aus
I	Hass	245	3.99	No	NZ
I	Hass	275	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