



## INFOCADO WEEKLY REPORT: 8th — 14th November 2014 (Wk 46)



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### Comments

- Majority of dispatches have been 20, 23 & 25 sized 5.5kg trays. Only 5.7% of the weekly dispatch has been sent as bulk, pre-pack, for oil or processing (refer pg 2).
- The weekly dispatch was again comparable to the weekly forecast volume in the last week. The total number of dispatches continues to ease in comparison to the past month. AAL would like to thank all contributors for providing their data (refer pg 3)
- The four weekly forecast indicate supply volumes will continue to lighten over the next month period (refer pg 3).
- The average retail price per Hass avocado has eased in Brisbane and Melbourne whilst holding steady in Perth and Sydney. Overall the major cities indicate the average individual avocado price has levelled out around the \$2.00 retail (refer pg 6).
- The major supermarkets are running sales and promotions in Sydney and Melbourne via store and catalogue specials (refer pg 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 Holiday

Christmas Day: 25th Dec | Boxing Day: 26th Dec | New Year's Day: 1st Jan 2015 | Australia Day: 26th Jan 2015 | Labour Day (WA): 2nd March 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:

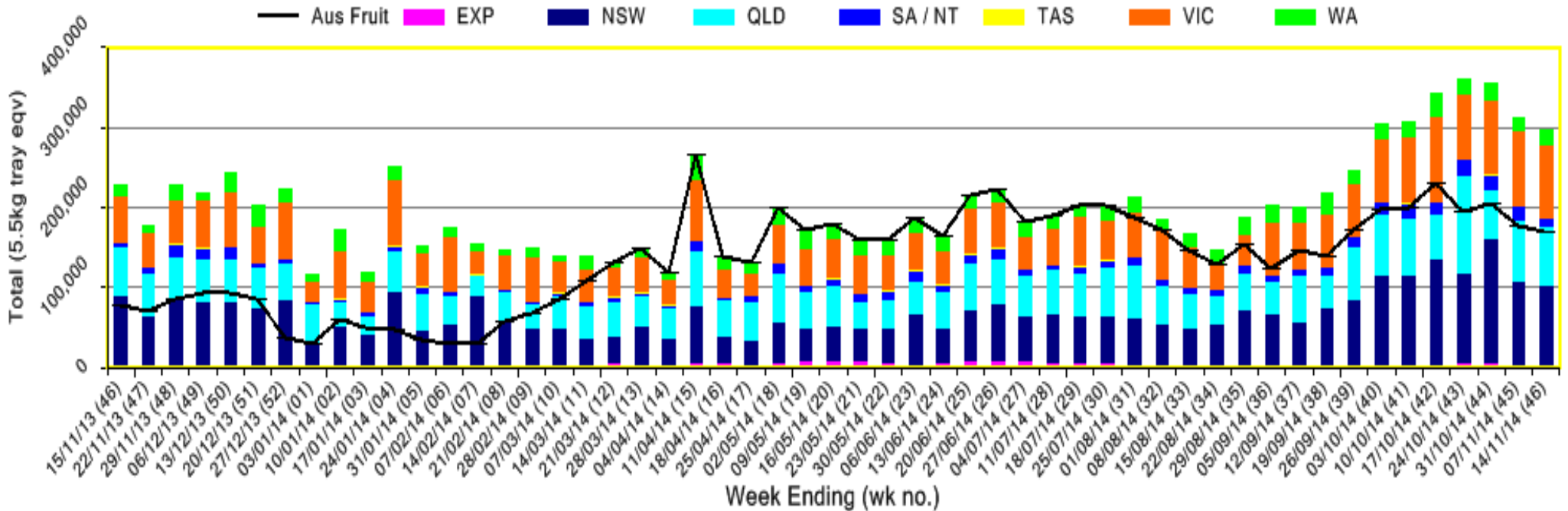
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 8th November - 14th November 2014 (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	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									1,369	1,369	384				2,067
NSW	167	3,131	12,758	26,166	105	19,185	17,105	6,956	5,615	91,188	4,072	2,940			99,127
QLD		3,489	6,643	13,739		14,279	16,456	8,310	7,433	70,349	872	8,580		2,000	73,858
SA / NT	644	709	1,388	1,916		160	640	4,940		10,397	816	384			11,951
VIC	182	2,889	11,319	26,301		23,297	18,203	3,659	3,622	89,472	362	2,640			90,610
WA	17	479	688	1,020	232	3,190	6,542	6,851	80	19,099	832	2,920	300		21,198
<b>Total</b>	<b>1,010</b>	<b>10,697</b>	<b>32,796</b>	<b>69,142</b>	<b>337</b>	<b>60,111</b>	<b>58,946</b>	<b>30,716</b>	<b>18,119</b>	<b>281,874</b>	<b>7,338</b>	<b>17,464</b>	<b>300</b>	<b>2,000</b>	<b>298,810</b>

**Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2014 to date = 9,133,952 5.5kg tray eqv**



Yellow shading indicates forecast data

Green shading indicates dispatch data

**Forecast Data (Week 46 - 50)**

Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Kg	5.5Kg Eqv
	<b>Week 46 - begin 08/11/2014</b>						
Hass	261,773	12,286	20,500	20	5,000		<b>288,751</b>
Lamb Hass	432	440					<b>1,232</b>
Reed	1,160	204				1,600	<b>1,822</b>
<b>Week Total</b>	<b>263,365</b>	<b>12,930</b>	<b>20,500</b>	<b>20</b>	<b>5,000</b>	<b>1,600</b>	<b>291,805</b>

<b>Week 47 - begin 15/11/2014</b>							
Hass	270,117	11,004	20,500	15	5,000		<b>294,763</b>
Lamb Hass	144	220					<b>544</b>
Reed	1,000	200			2,000		<b>1,728</b>
<b>Week Total</b>	<b>271,261</b>	<b>11,424</b>	<b>20,500</b>	<b>15</b>	<b>7,000</b>		<b>297,035</b>

<b>Week 48 - begin 22/11/2014</b>							
Hass	258,068	7,854	20,500	20	5,000		<b>276,988</b>
Lamb Hass	432	220					<b>832</b>
Reed	1,000	200			2,000	2,000	<b>2,092</b>
<b>Week Total</b>	<b>259,500</b>	<b>8,274</b>	<b>20,500</b>	<b>20</b>	<b>7,000</b>	<b>2,000</b>	<b>279,912</b>

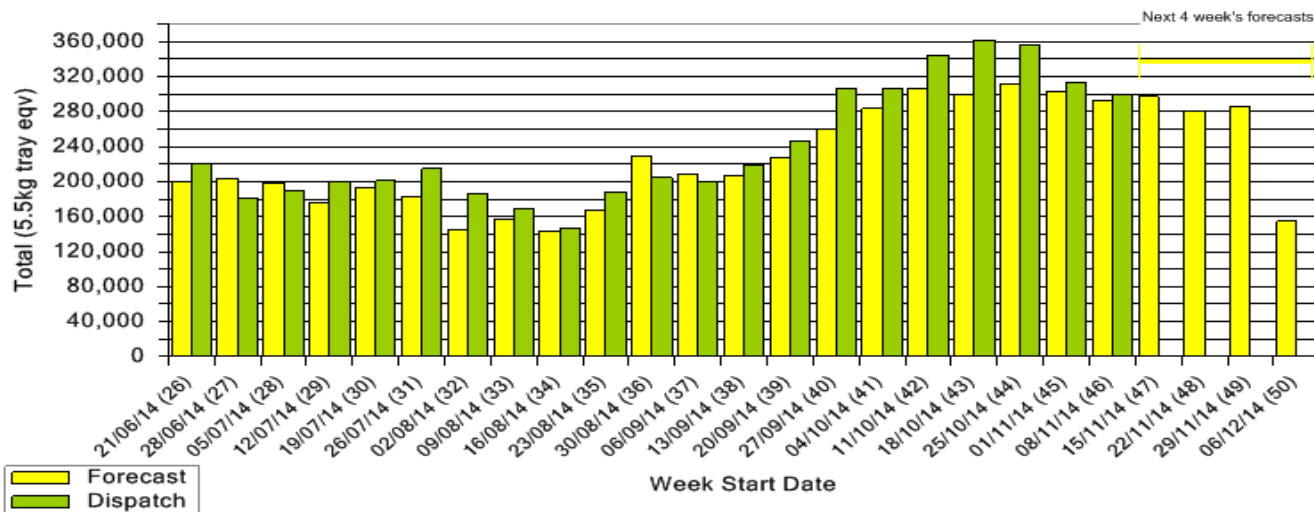
<b>Week 49 - begin 29/11/2014</b>							
Hass	260,990	9,475	20,500	20	5,000		<b>282,857</b>
Lamb Hass	432	220					<b>832</b>
Reed	1,000	200			2,000	2,000	<b>2,092</b>
<b>Week Total</b>	<b>262,422</b>	<b>9,895</b>	<b>20,500</b>	<b>20</b>	<b>7,000</b>	<b>2,000</b>	<b>285,781</b>

<b>Week 50 - begin 06/12/2014</b>							
Hass	130,298	9,450	20,500	20	5,000		<b>152,120</b>
Lamb Hass	432	220					<b>832</b>
Reed	1,000	200			2,000		<b>1,728</b>
<b>Week Total</b>	<b>131,730</b>	<b>9,870</b>	<b>20,500</b>	<b>20</b>	<b>7,000</b>		<b>154,679</b>

**Dispatch Data (Week 46 - begin 8/11/2014)**

Variety	Trays	Bulk	P/PK	Oil	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
	<b>Week 46 - begin 08/11/2014</b>					
Hass	277,771	6,915	17,464	300		<b>293,574</b>
Lamb Hass	2,341	144				<b>2,603</b>
Reed	1,762	279			2,000	<b>2,633</b>
<b>Total</b>	<b>281,874</b>	<b>7,338</b>	<b>17,464</b>	<b>300</b>	<b>2,000</b>	<b>298,810</b>

Dispatch vs weekly forecast - all varieties and all packs (21st June 2014 to 12th December 2014)

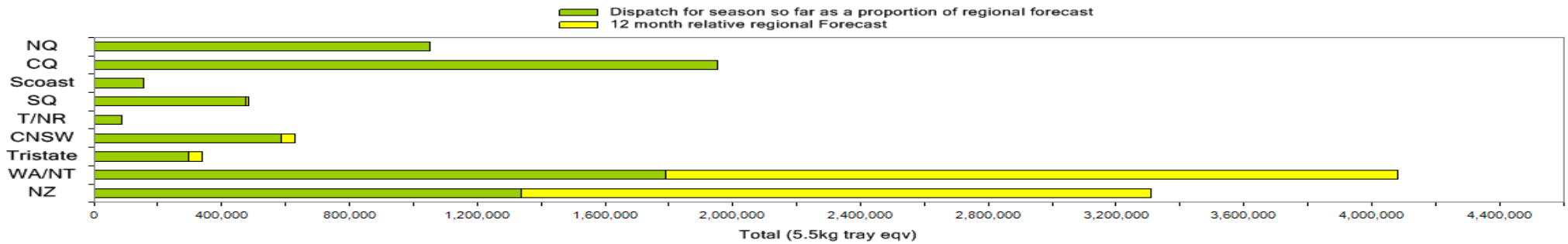


**New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015**

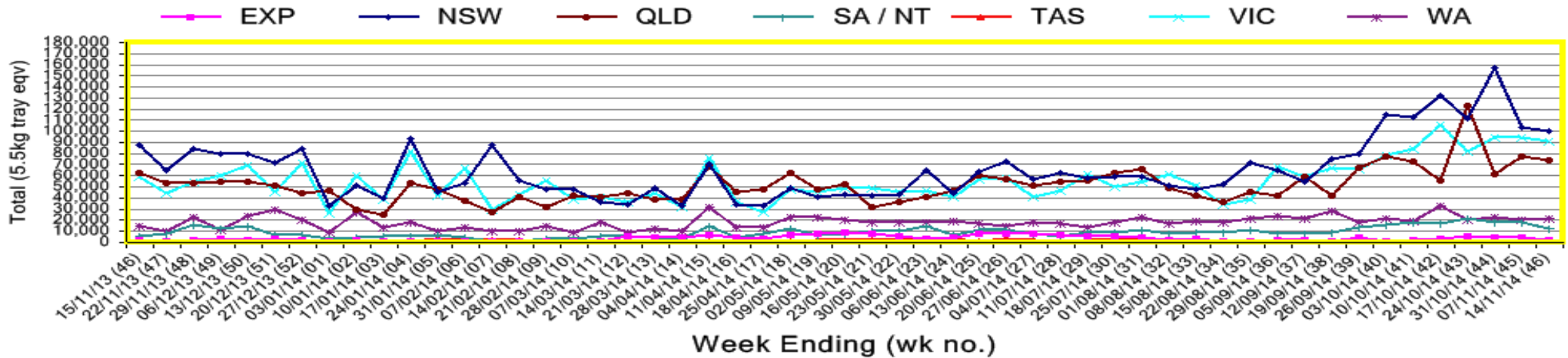
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	56,168	301,684	443,740	379,760	393,210	552,900	563,784	252,876	5,280	<b>2,949,402</b>
<b>Australia (from Infocado)</b>	123,747	293,918	653,001	267,538						<b>1,338,204</b>
<b>USA<sup>1</sup></b>	6	12,687	38,006							<b>50,699</b>
<b>Japan<sup>1</sup></b>	1,916	12,999	21,753							<b>36,668</b>
<b>Other Asia<sup>1</sup></b>	7,609	43,179	68,125							<b>118,913</b>
<b>Total</b>	<b>133,278</b>	<b>362,783</b>	<b>780,885</b>	<b>267,538</b>						<b>1,544,484</b>

<sup>1</sup> 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 = 9,133,952 5.5kg tray eqv



**Week 46 contributors - Packhouses**

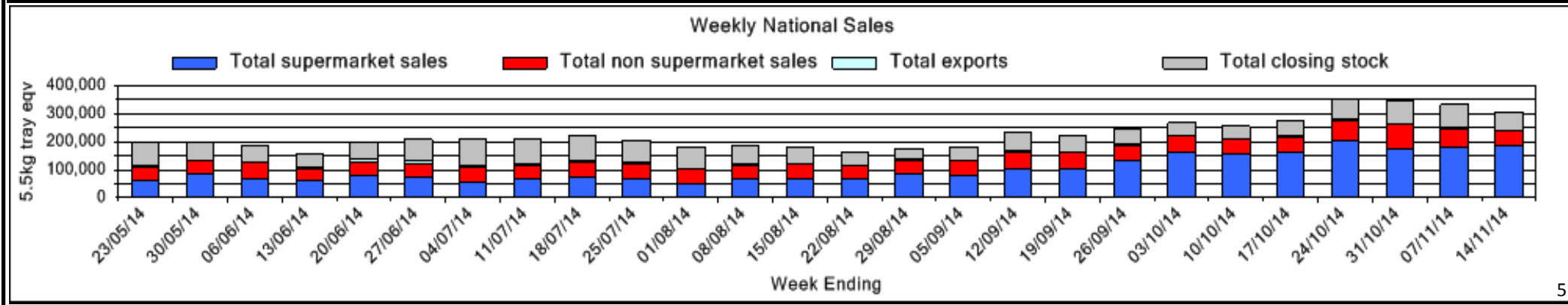
Natures Fruit Company (Consolidator)	West Aussie Avos (WA)
Simpson Farms Pty Ltd (Consolidator)	Delroy Orchards (WA)
The Avolution (Consolidator)	CNSW: Less than 3 contributors
Avocado Industry Council (NZAGA)	CQ: Less than 3 contributors
Box Organics (WA)	SQ: Less than 3 contributors
Mariners Rest (WA)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

**Week 46 contributors - Wholesalers**

C & S Ponte Produce Pty Ltd (Melbourne)	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)
Fresh Choice WA Pty Ltd (Perth)	United Fresh (Adelaide)
Murray Bros (Brisbane)	WA Farm Direct (Perth)
Sculli & Co Pty Ltd (Melbourne)	

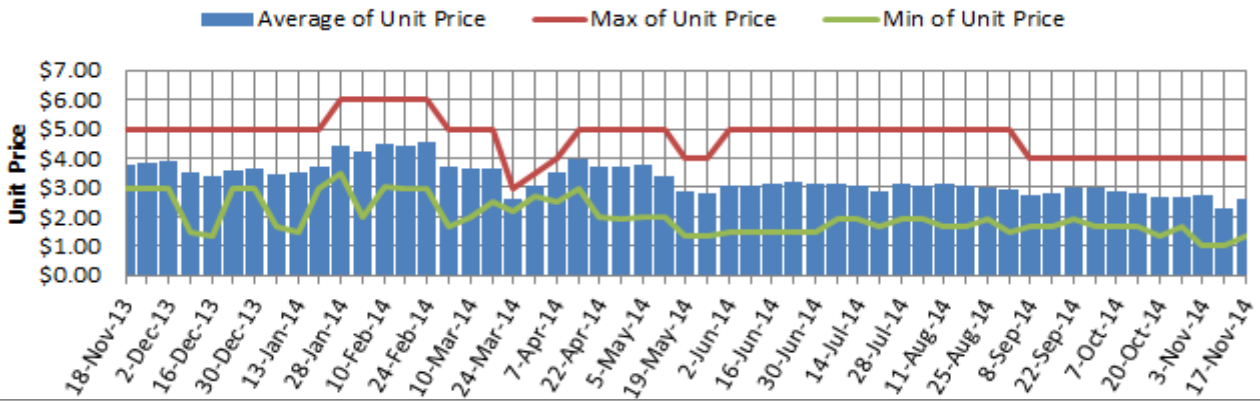
### Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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																	
<b>Total supermarket sales</b>																		
<b>Total non supermarket sales</b>																		
<b>Total exports</b>																		
<b>Total sales</b>	44,510			44,510	3,363			3,363	6,115						50,625			50,625
<b>Total Stock on Hand</b>																		
QLD																		
<b>Total supermarket sales</b>	42,828		304	43,132	770			770	1,400	3,960			3,960	720	44,948		304	45,252
<b>Total non supermarket sales</b>	18,303		210	18,513	614			614	1,116						19,419		210	19,629
<b>Total exports</b>																		
<b>Total sales</b>	61,131		514	61,645	1,384			1,384	2,516	3,960			3,960	720	64,367		514	64,881
<b>Total Stock on Hand</b>	17,118			17,118	940			940	1,709						18,827			18,827
SA & TAS	Full data set not displayed because not enough SA wholesalers contributed data this week																	
<b>Total supermarket sales</b>																		
<b>Total non supermarket sales</b>																		
<b>Total exports</b>																		
<b>Total sales</b>	19,545		1,354	20,899	968			968	1,760						21,305		1,354	22,659
<b>Total Stock on Hand</b>																		
VIC																		
<b>Total supermarket sales</b>	59,695			59,695	144			144	262						59,957			59,957
<b>Total non supermarket sales</b>	13,419		1,019	14,438	1,943		344	2,287	4,158	895			895	163	17,114		1,644	18,759
<b>Total exports</b>																		
<b>Total sales</b>	73,114		1,019	74,133	2,087		344	2,431	4,420	895			895	163	77,071		1,644	78,716
<b>Total Stock on Hand</b>	22,289		211	22,500	1,628			1,628	2,960	1,010			1,010	184	25,433		211	25,644
WA																		
<b>Total supermarket sales</b>	12,411			12,411	193			193	351	660			660	120	12,882			12,882
<b>Total non supermarket sales</b>	5,482			5,482	909			909	1,653	189			189	34	7,169			7,169
<b>Total exports</b>	1,369			1,369	384			384	698						2,067			2,067
<b>Total sales</b>	19,262			19,262	1,486			1,486	2,702	849			849	154	22,118			22,118
<b>Total Stock on Hand</b>	6,752			6,752	460			460	836	714			714	130	7,718			7,718
Total																		
<b>Total supermarket sales</b>	174,554		1,456	176,010	5,236			5,236	9,520	4,620			4,620	840	184,914		1,456	186,370
<b>Total non supermarket sales</b>	41,639		1,431	43,070	3,668		344	4,012	7,295	1,084			1,084	197	48,505		2,056	50,562
<b>Total exports</b>	1,369			1,369	384			384	698						2,067			2,067
<b>Total sales</b>	217,562		2,887	220,449	9,288		344	9,632	17,513	5,704			5,704	1,037	235,486		3,512	238,999
<b>Total Stock on Hand</b>	59,370		291	59,661	3,751			3,751	6,820	1,724			1,724	313	66,503		291	66,794

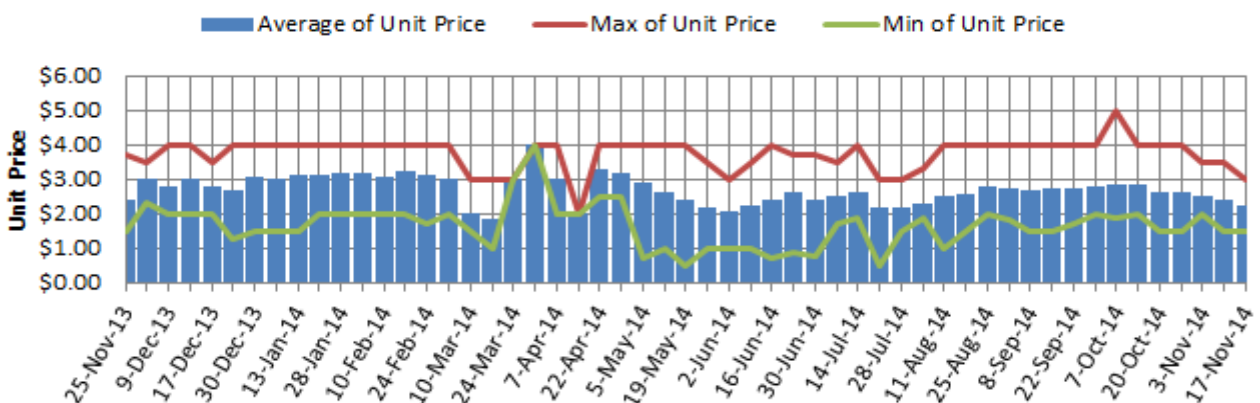




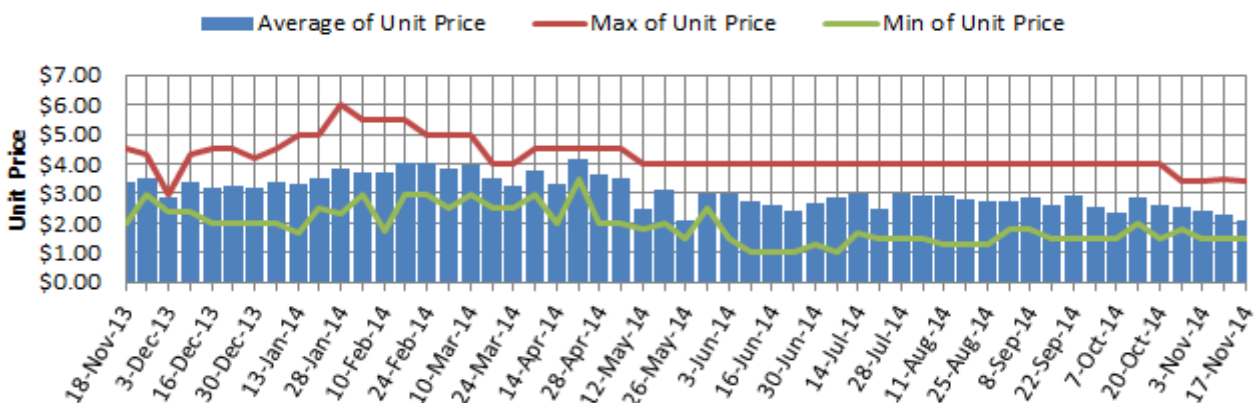
### Hass Avocado Average Retail Prices - Sydney



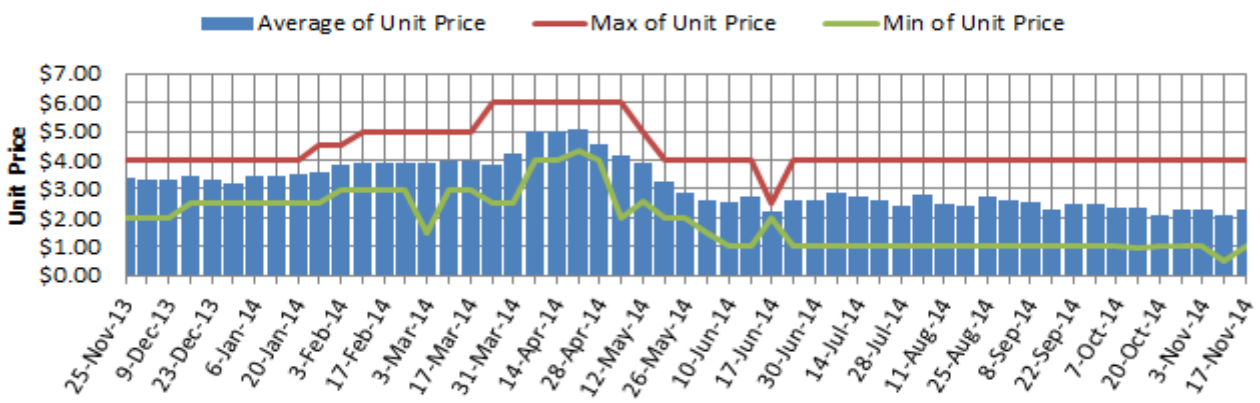
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

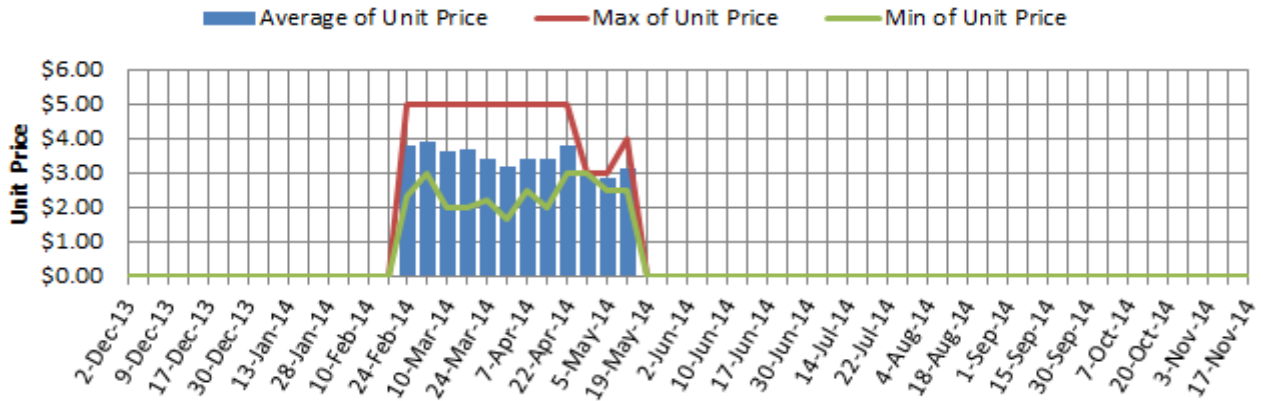


### Hass Avocado Average Retail Prices - Perth

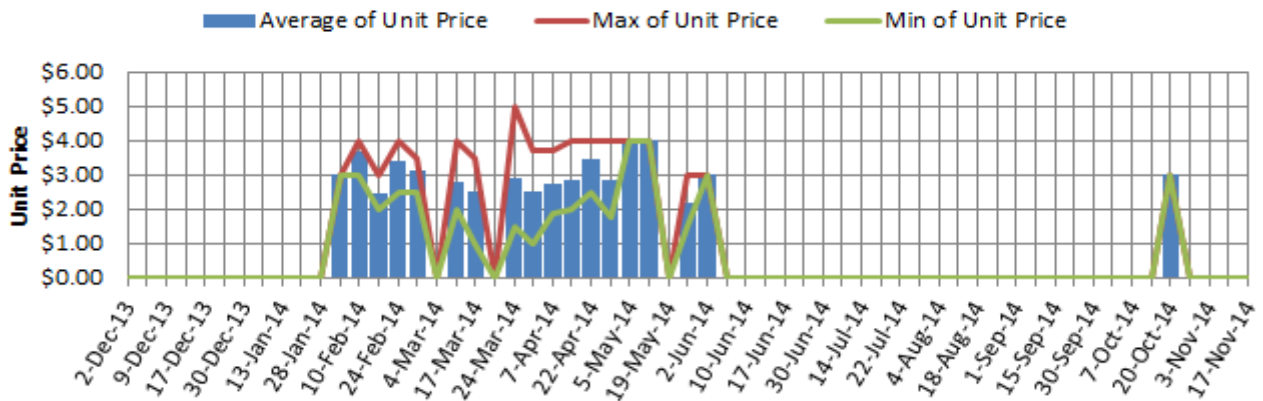


Assessment date (Week Commencing)

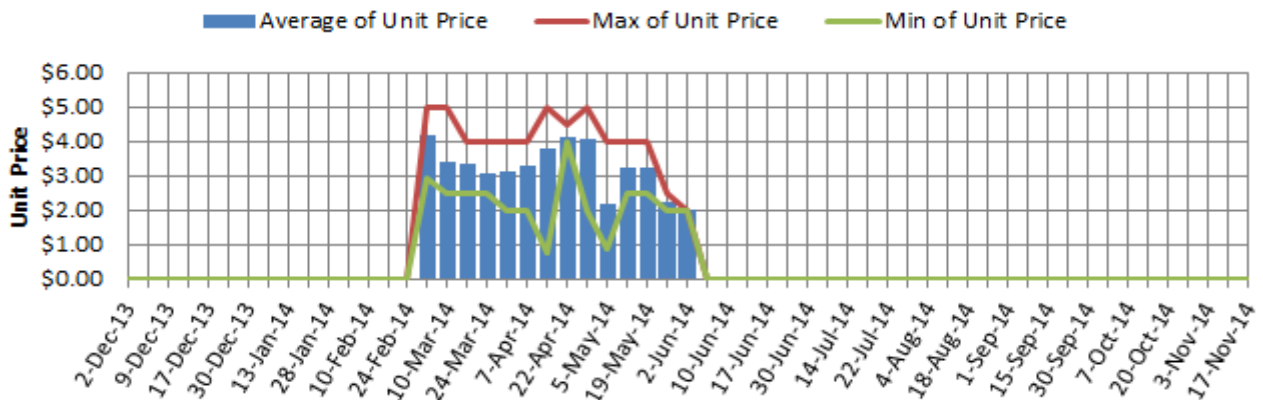
## Shepard Avocado Average Retail Prices - Sydney



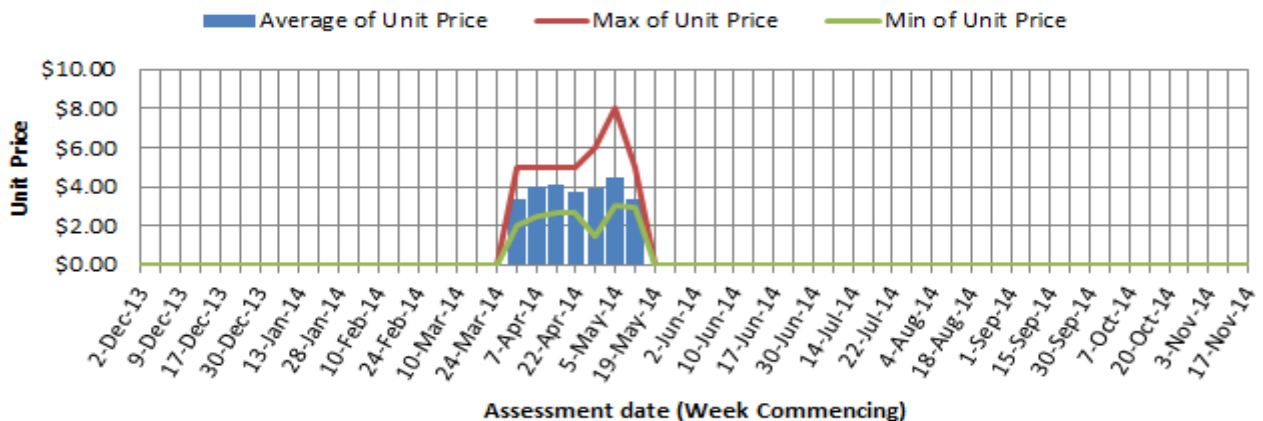
## Shepard Avocado Average Retail Prices - Brisbane



## Shepard Avocado Average Retail Prices - Melbourne



## Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 17th November 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>					
I	Hass	190	1.33	Store	NZ	Coles	Hass	300	1.50	Store	Aus
I	Reed	390	1.99	No	Aus	Coles	Hass	250	1.50	Store	Aus
I	Reed	400	1.99	No	Aus	Coles	Hass	235	1.50	Store	Aus
Coles	Hass	280	2.00	Cat	Aus	Woolworths	Hass	280	1.78	Cat	Aus
Coles	Hass	260	2.00	Cat	Aus	Woolworths	Hass	250	1.78	Cat	Aus
Coles	Hass	280	2.00	Cat	Aus	Woolworths	Hass	300	1.78	Cat	Aus
I	Reed	420	2.00	Store	Aus	I	Hass	225	1.99	No	Aus
Woolworths	Hass	270	2.28	No	Aus	I	Hass	190	1.99	No	Aus
Woolworths	Hass	280	2.28	No	Mixed	IGA	Hass	230	1.99	No	Aus
Woolworths	Hass	270	2.28	No	Aus	I	Hass	205	1.99	No	NS
I	Hass	290	2.50	No	NZ	I	Hass	360	2.19	No	Aus
I	Hass	300	2.50	No	NZ	I	Hass	300	2.98	No	Aus
Foodworks	Hass	280	2.69	No	NZ	I	Hass	370	2.99	No	Aus
IGA	Hass	220	2.98	No	NZ	I	Hass	325	3.39	No	Aus
I	Hass	260	2.99	No	Aus	<b>PERTH</b>					
I	Hass	280	2.99	No	Aus	I	Hass	230	1.48	Store	Aus
I	Hass	260	2.99	No	Aus	IGA	Hass	160	1.49	No	NS
IGA	Hass	280	3.49	No	Aus	IS	Hass	225	1.50	Store	Aus
I	Hass	300	3.99	No	Aus	I	Hass	230	1.99	No	Aus
<b>BRISBANE</b>						I	Hass	230	1.99	No	Aus
IGA	Hass	240	1.49	Cat	NZ	Coles	Hass	190	2.00	No	Aus
I	Hass	215	1.50	Store	NZ	Coles	Hass	170	2.00	No	Aus
I	Hass	280	1.69	No	NZ	Coles	Hass	170	2.00	No	Aus
I	Hass	154	1.89	Store	NZ	Woolworths	Hass	210	2.48	No	Aus
Woolworths	Hass	220	1.98	Store	Aus	Woolworths	Hass	200	2.48	No	Aus
I	Hass	220	1.99	No	NZ	Woolworths	Hass	205	2.48	No	Aus
I	Hass	295	1.99	No	NZ	IGA	Hass	210	2.49	No	Aus
I	Hass	260	1.99	No	NZ	I	Hass	260	2.99	No	Aus
Coles	Hass	220	2.00	No	NZ	IGA	Hass	370	2.99	No	Aus
Coles	Hass	250	2.00	No	NZ	IGA	Hass	295	2.99	No	Aus
Woolworths	Hass	305	2.68	No	Aus	I	Hass	270	3.99	No	Aus
Woolworths	Hass	240	2.68	No	Aus						
IGA	Hass	260	2.99	No	Aus						
Woolworths	Hass	330	2.99	No	Aus						
I	Hass	245	3.00	No	Aus						
Coles	Hass	220	2.00	No	NZ						

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