



# INFOCADO WEEKLY REPORT: 15th — 21st November 2014 (Wk 47)



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## Comments

- Majority of dispatches have been 20, 23 & 25 sized 5.5kg trays. About 5% of the weekly dispatch has been sent as bulk, pre-pack, for oil or processing (refer P 2).
- The weekly dispatch was 333,472 tray equivalents, about 12% above the forecast volumes for the week (refer P 3). Australian and New Zealand fruit is currently supplying about equal proportions of the Australian market (refer P 2). AAL would like to thank all contributors for providing their data
- The four weekly forecast indicates lower supply volumes are expected over the next month (refer P 3).
- The data on P 4 shows that WA is now about half way through their season, with NZ approaching the half way point.
- The average retail price per Hass avocado is generally holding firm across all cities. Woolworths has been running a catalogue special in Melbourne and Perth, with a smaller sized fruit on offer in Perth (refer P 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 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:

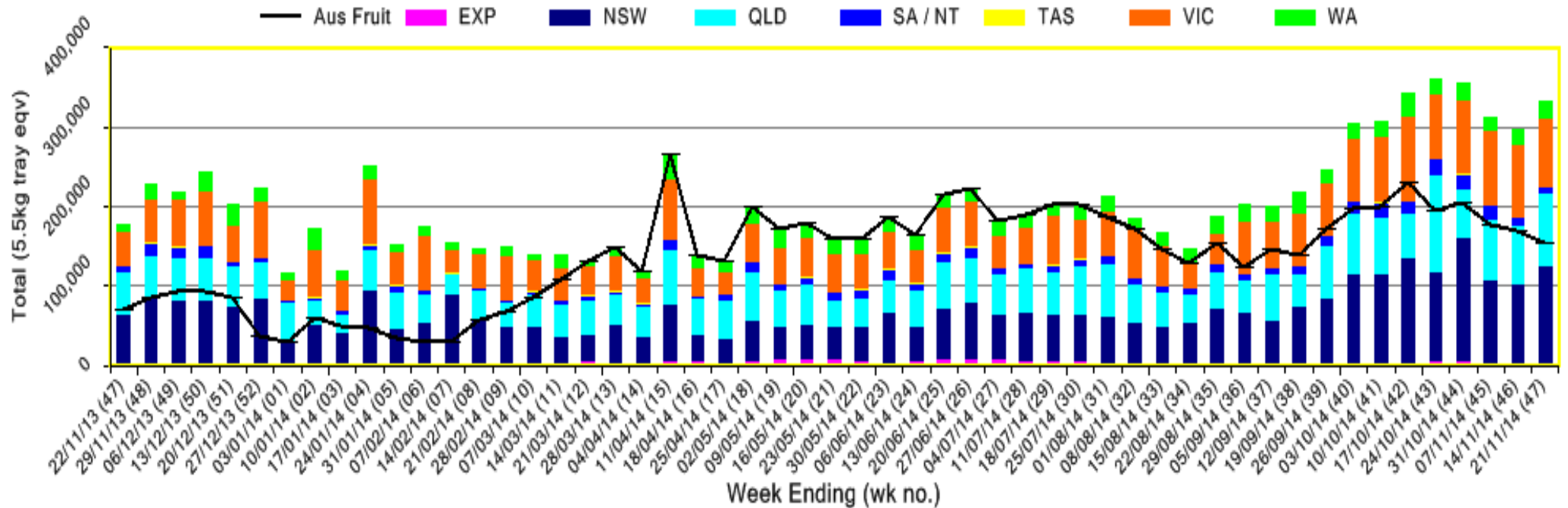
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 15th November - 21st November 2014 (Wk 47)**

Dest. State	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	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP			24					2,568	2,592	576				3,639
NSW	998	5,253	13,829	28,388	23,621	22,464	9,745	9,389	113,687	3,555	3,960			120,871
QLD		4,133	8,518	18,030	17,518	20,012	10,864	9,355	88,430	480	5,092		2,760	90,731
SA / NT	214	1,170	1,547	1,418	320	160	2,380		7,209	336	2,280			8,235
VIC	399	4,219	10,697	23,153	16,635	18,052	5,488	4,387	83,030	1,937	180			86,585
WA	26	233	396	1,088	2,192	8,590	8,808	22	21,355	1,081	484	20		23,412
<b>Total</b>	<b>1,637</b>	<b>15,008</b>	<b>35,011</b>	<b>72,077</b>	<b>60,286</b>	<b>69,278</b>	<b>37,285</b>	<b>25,721</b>	<b>316,303</b>	<b>7,965</b>	<b>11,996</b>	<b>20</b>	<b>2,760</b>	<b>333,472</b>

**Throughput Australian & NZ avocados by destination state**  
**Throughput 1st January 2014 to date = 9,467,425 5.5kg tray eqv**



Yellow shading indicates forecast data

Green shading indicates dispatch data

**Forecast Data (Week 47 - 51)**

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

Week 47 - begin 15/11/2014							
Hass	270,117	11,004	20,500	15	5,000		294,763
Lamb Hass	144	220					544
Reed	1,000	200			2,000		1,728
<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>

Week 48 - begin 22/11/2014							
Hass	246,248	7,154	15,500	20	2,000		262,441
Lamb Hass	864	310					1,428
Reed	1,100	220			2,000	2,000	2,228
<b>Week Total</b>	<b>248,212</b>	<b>7,684</b>	<b>15,500</b>	<b>20</b>	<b>4,000</b>	<b>2,000</b>	<b>266,096</b>

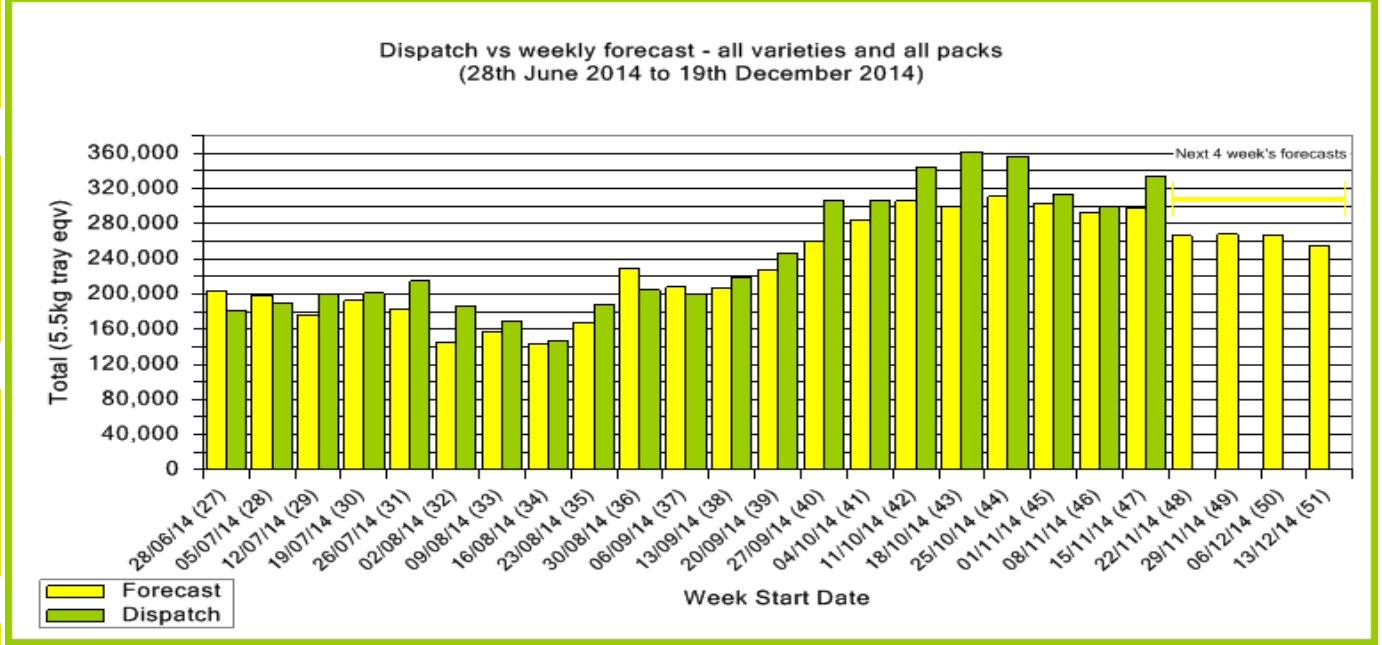
Week 49 - begin 29/11/2014							
Hass	246,220	8,475	15,500	20	2,000		264,815
Lamb Hass	432	400					1,159
Reed	1,100	220			2,000	2,000	2,228
<b>Week Total</b>	<b>247,752</b>	<b>9,095</b>	<b>15,500</b>	<b>20</b>	<b>4,000</b>	<b>2,000</b>	<b>268,201</b>

Week 50 - begin 06/12/2014							
Hass	246,980	8,450	5,500	20	2,000		263,712
Lamb Hass	432	400					1,159
Reed	1,100	220			2,000		1,864
<b>Week Total</b>	<b>248,512</b>	<b>9,070</b>	<b>5,500</b>	<b>20</b>	<b>4,000</b>		<b>266,734</b>

Week 51 - begin 13/12/2014							
Hass	238,040	6,925	5,000	20	2,000		251,908
Lamb Hass	432	400					1,159
Reed	1,100	220			2,000		1,864
<b>Week Total</b>	<b>239,572</b>	<b>7,545</b>	<b>5,000</b>	<b>20</b>	<b>4,000</b>		<b>254,930</b>

**Dispatch Data (Week 47 - begin 15/11/2014)**

Variety	Trays	Bulk	P/PK	Oil	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Hass	311,027	7,097	11,996	20	760	326,254
Lamb Hass	4,222	780				5,640
Reed	1,054	88			2,000	1,578
<b>Total</b>	<b>316,303</b>	<b>7,965</b>	<b>11,996</b>	<b>20</b>	<b>2,760</b>	<b>333,472</b>

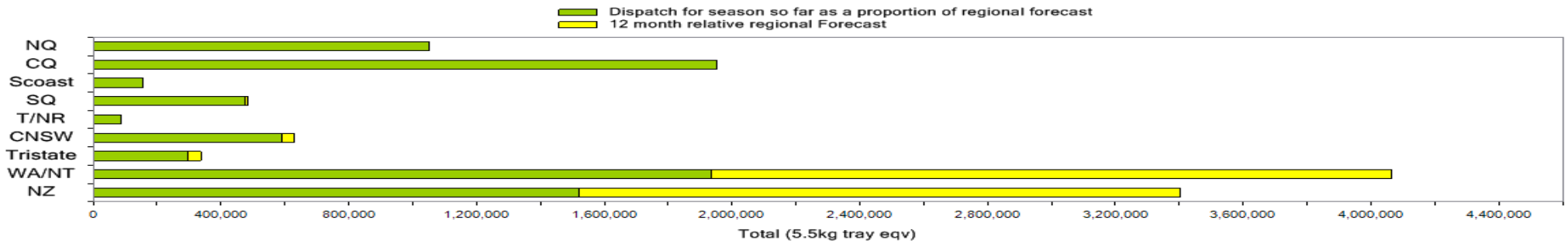


**New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015**

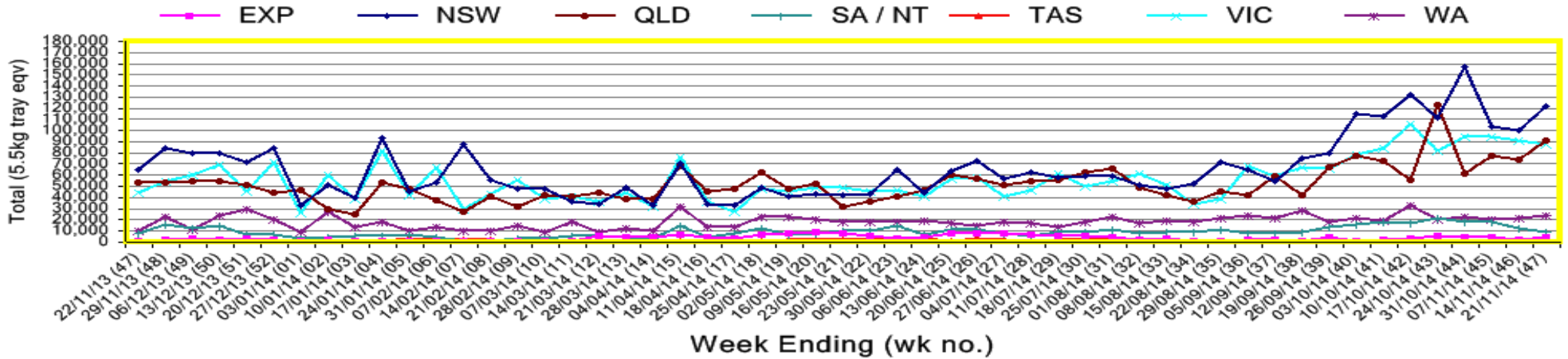
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	56,168	301,684	443,740	379,760	393,210	552,900	563,784	252,876	5,280	<b>2,949,402</b>
<b>Australia (from Infocado)</b>	123,747	293,918	653,001	448,251						<b>1,518,917</b>
<b>USA<sup>1</sup></b>	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>448,251</b>						<b>1,725,197</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 = 9,467,425 5.5kg tray eqv



**Week 47 contributors - Packhouses**

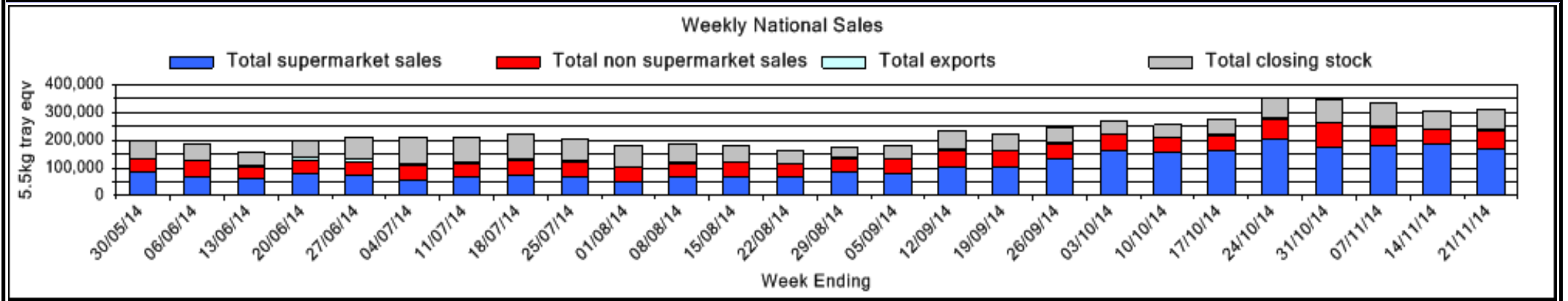
Simpson Farms Pty Ltd (Consolidator)	West Aussie Avos (WA)
The Avolution (Consolidator)	Avonova (WA)
Avocado Industry Council (NZAGA)	Delroy Orchards (WA)
Box Organics (WA)	CNSW: Less than 3 contributors
Advance Packing & Marketing Services P/L (WA)	TRI: Less than 3 contributors
Mariners Rest (WA)	

**Week 47 contributors - Wholesalers**

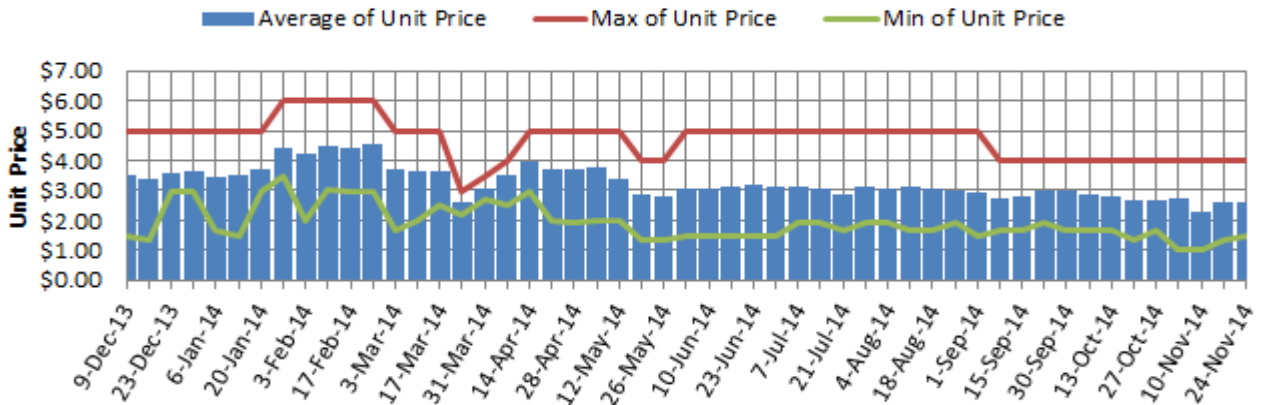
C & S Ponte Produce Pty Ltd (Melbourne)	Premier Fruits Pty Ltd (Melbourne)
Costa Farms (Adelaide)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Brisbane)	Sinclair & Antico (Aust) Pty Ltd (Sydney)
Costa Farms (Melbourne)	The La Manna Group (Adelaide)
Etherington (Perth)	The La Manna Group (Brisbane)
Exotic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

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

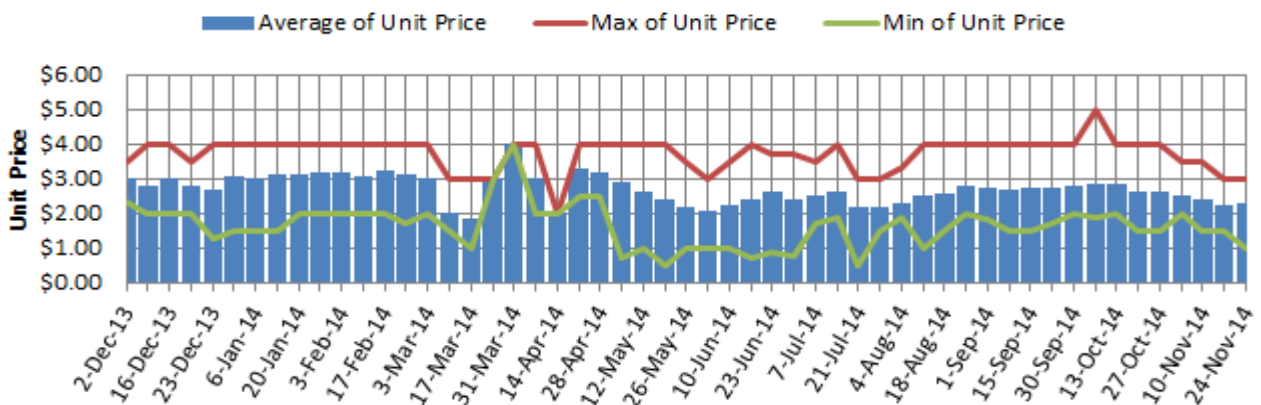
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
<b>Total supermarket sales</b>	47,363		432	<b>47,795</b>	1,830			1,830	<b>3,327</b>	3,960			3,960	<b>720</b>	51,410		432	<b>51,842</b>
<b>Total non supermarket sales</b>	1,636			<b>1,636</b>	197			197	<b>358</b>						1,994			<b>1,994</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>48,999</b>		<b>432</b>	<b>49,431</b>	<b>2,027</b>			<b>2,027</b>	<b>3,685</b>	<b>3,960</b>			<b>3,960</b>	<b>720</b>	<b>53,404</b>		<b>432</b>	<b>53,836</b>
<b>Total Stock on Hand</b>	<b>100</b>			<b>100</b>											<b>100</b>			<b>100</b>
QLD																		
<b>Total supermarket sales</b>	45,005			<b>45,005</b>	480			480	<b>873</b>	1,320			1,320	<b>240</b>	46,118			<b>46,118</b>
<b>Total non supermarket sales</b>	26,876		143	<b>27,019</b>	1,029			1,029	<b>1,871</b>						28,747		143	<b>28,890</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>71,881</b>		<b>143</b>	<b>72,024</b>	<b>1,509</b>			<b>1,509</b>	<b>2,744</b>	<b>1,320</b>			<b>1,320</b>	<b>240</b>	<b>74,865</b>		<b>143</b>	<b>75,008</b>
<b>Total Stock on Hand</b>	<b>29,242</b>			<b>29,242</b>	<b>547</b>			<b>547</b>	<b>995</b>						<b>30,237</b>			<b>30,237</b>
SA & TAS																		
<b>Total supermarket sales</b>	11,389			<b>11,389</b>											11,389			<b>11,389</b>
<b>Total non supermarket sales</b>	8,233		128	<b>8,361</b>	2,504			2,504	<b>4,553</b>						12,786		128	<b>12,914</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>19,622</b>		<b>128</b>	<b>19,750</b>	<b>2,504</b>			<b>2,504</b>	<b>4,553</b>				<b>4,553</b>		<b>24,175</b>		<b>128</b>	<b>24,303</b>
<b>Total Stock on Hand</b>	<b>19,395</b>		<b>340</b>	<b>19,735</b>	<b>2,326</b>			<b>2,326</b>	<b>4,229</b>						<b>23,624</b>		<b>340</b>	<b>23,964</b>
VIC																		
<b>Total supermarket sales</b>	43,350			<b>43,350</b>	528			528	<b>960</b>						44,310			<b>44,310</b>
<b>Total non supermarket sales</b>	13,801		749	<b>14,550</b>	712		341	1,053	<b>1,915</b>	465			465	<b>85</b>	15,180		1,369	<b>16,549</b>
<b>Total exports</b>																		
<b>Total sales</b>	<b>57,151</b>		<b>749</b>	<b>57,900</b>	<b>1,240</b>		<b>341</b>	<b>1,581</b>	<b>2,875</b>	<b>465</b>			<b>465</b>	<b>85</b>	<b>59,490</b>		<b>1,369</b>	<b>60,859</b>
<b>Total Stock on Hand</b>	<b>17,866</b>		<b>1,668</b>	<b>19,534</b>	<b>1,324</b>		<b>43</b>	<b>1,367</b>	<b>2,485</b>	<b>1,775</b>			<b>1,775</b>	<b>323</b>	<b>20,596</b>		<b>1,746</b>	<b>22,342</b>
WA																		
<b>Total supermarket sales</b>	15,850			<b>15,850</b>	264			264	<b>480</b>	494			494	<b>90</b>	16,420			<b>16,420</b>
<b>Total non supermarket sales</b>	5,805			<b>5,805</b>	782			782	<b>1,422</b>	464			464	<b>84</b>	7,311			<b>7,311</b>
<b>Total exports</b>	2,592			<b>2,592</b>	576			576	<b>1,047</b>						3,639			<b>3,639</b>
<b>Total sales</b>	<b>24,247</b>			<b>24,247</b>	<b>1,622</b>			<b>1,622</b>	<b>2,949</b>	<b>958</b>			<b>958</b>	<b>174</b>	<b>27,370</b>			<b>27,370</b>
<b>Total Stock on Hand</b>	<b>2,718</b>			<b>2,718</b>	<b>238</b>		<b>17</b>	<b>255</b>	<b>464</b>	<b>237</b>			<b>237</b>	<b>43</b>	<b>3,194</b>		<b>31</b>	<b>3,225</b>
Total																		
<b>Total supermarket sales</b>	162,957		432	<b>163,389</b>	3,102			3,102	<b>5,640</b>	5,774			5,774	<b>1,050</b>	169,647		432	<b>170,079</b>
<b>Total non supermarket sales</b>	56,351		1,020	<b>57,371</b>	5,224		341	5,565	<b>10,118</b>	929			929	<b>169</b>	66,018		1,640	<b>67,659</b>
<b>Total exports</b>	2,592			<b>2,592</b>	576			576	<b>1,047</b>						3,639			<b>3,639</b>
<b>Total sales</b>	<b>221,900</b>		<b>1,452</b>	<b>223,352</b>	<b>8,902</b>		<b>341</b>	<b>9,243</b>	<b>16,805</b>	<b>6,703</b>			<b>6,703</b>	<b>1,219</b>	<b>239,304</b>		<b>2,072</b>	<b>241,377</b>
<b>Total Stock on Hand</b>	<b>69,321</b>		<b>2,008</b>	<b>71,329</b>	<b>4,435</b>		<b>60</b>	<b>4,495</b>	<b>8,173</b>	<b>2,012</b>			<b>2,012</b>	<b>366</b>	<b>77,750</b>		<b>2,117</b>	<b>79,868</b>



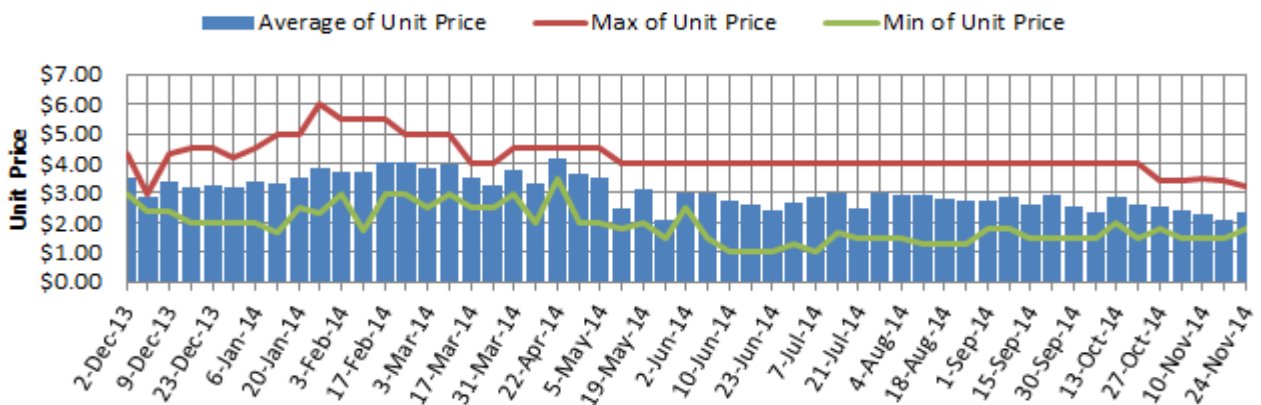
### Hass Avocado Average Retail Prices - Sydney



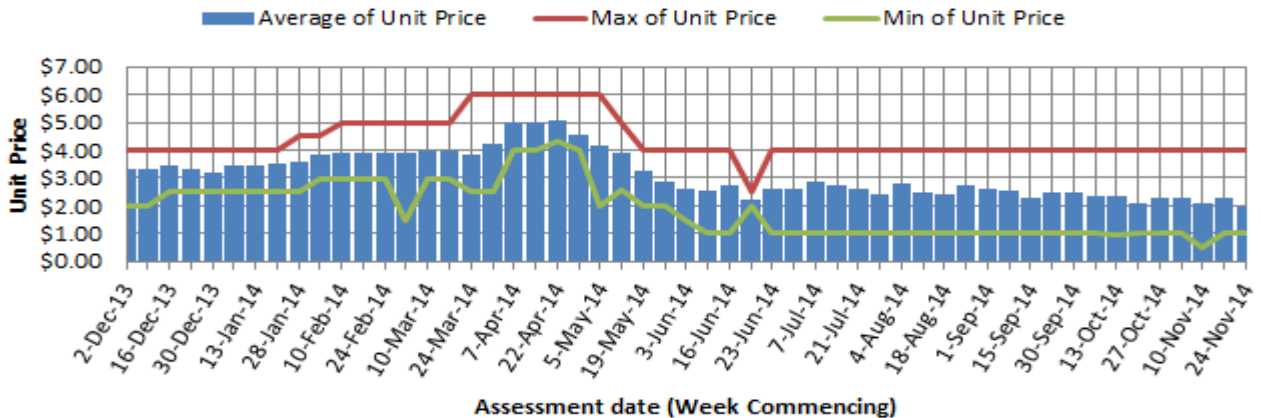
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

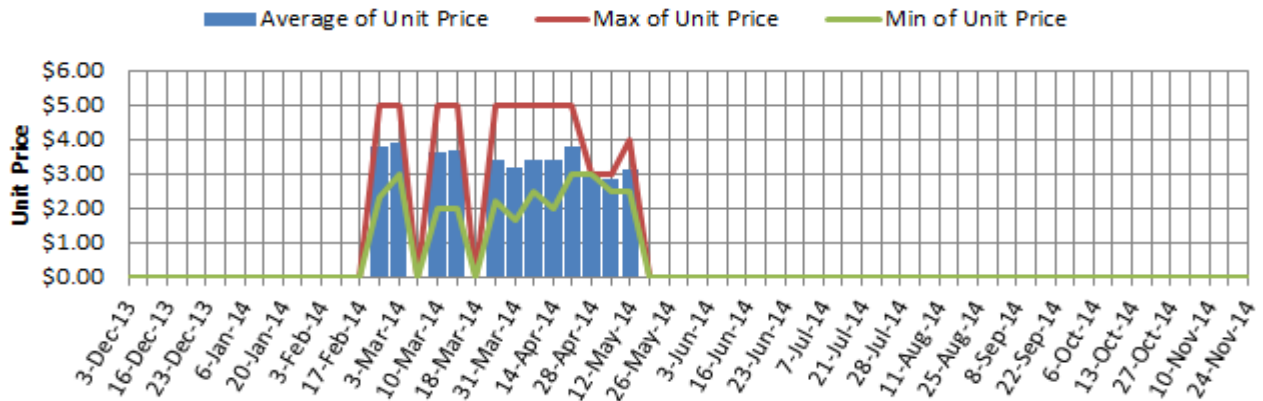


### Hass Avocado Average Retail Prices - Perth

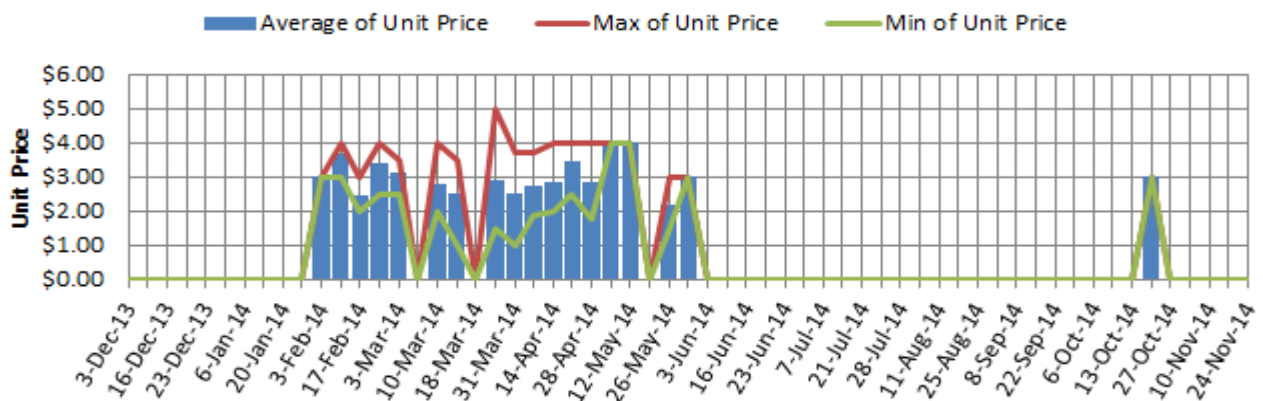


Assessment date (Week Commencing)

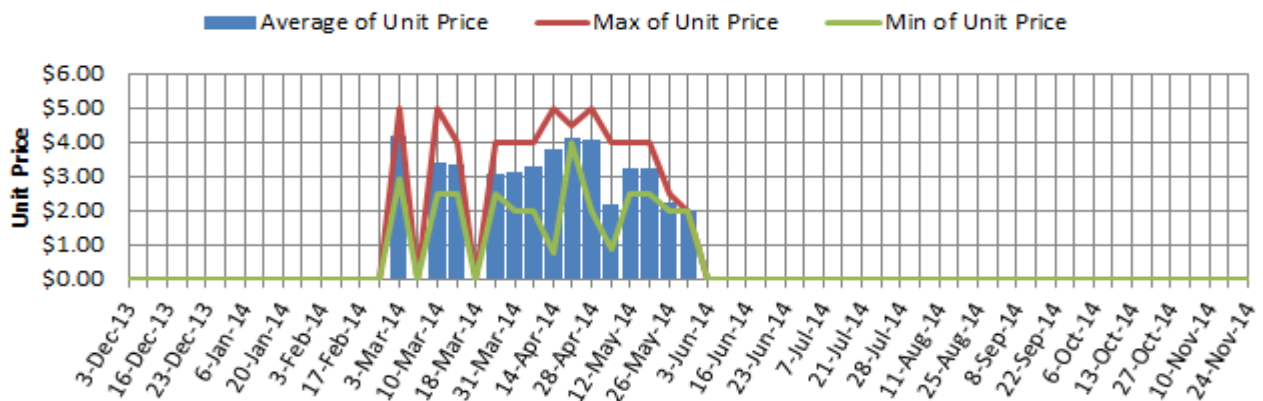
## Shepard Avocado Average Retail Prices - Sydney



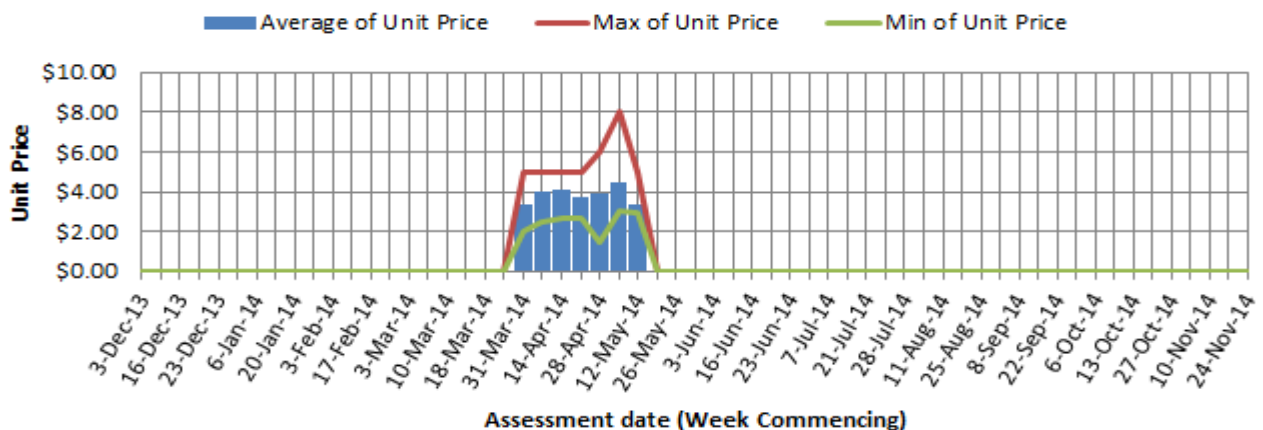
## Shepard Avocado Average Retail Prices - Brisbane



## Shepard Avocado Average Retail Prices - Melbourne



## Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 24th November 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>					
I	Hass	300	1.50	Store	NZ
I	Hass	300	1.50	Store	NZ
I	Hass	280	1.50	Store	NZ
I	Reed	380	1.66	Store	Aus
I	Reed	420	1.66	Store	Aus
I	Reed	360	1.99	No	Aus
Coles	Hass	270	2.50	No	Aus
Coles	Hass	270	2.50	No	Aus
Woolworths	Hass	250	2.68	No	Aus
Woolworths	Hass	300	2.68	No	Mixed
Woolworths	Hass	230	2.68	No	NZ
Foodworks	Hass	300	2.69	No	NZ
Coles	Hass	220	2.90	No	Aus
IGA	Hass	230	2.98	No	NZ
I	Hass	260	2.99	No	Aus
I	Hass	250	2.99	No	Aus
I	Hass	260	2.99	No	Aus
IGA	Hass	280	3.49	No	Aus
I	Hass	310	3.99	No	Aus
<b>BRISBANE</b>					
I	Hass	250	0.99	Store	NZ
I	Hass	280	1.50	No	NZ
IGA	Hass	230	1.98	No	NZ
I	Hass	260	1.99	No	NZ
I	Hass	260	1.99	No	NZ
I	Hass	255	1.99	No	NZ
IGA	Hass	305	2.49	No	Aus
Coles	Hass	305	2.50	No	NZ
Coles	Hass	250	2.50	No	Aus
Coles	Hass	245	2.50	No	Aus
Woolworths	Hass	200	2.68	No	Aus
Woolworths	Hass	265	2.68	No	Aus
Woolworths	Hass	240	2.68	No	Aus
I	Hass	138	2.69	No	NS
I	Hass	336	2.99	No	Aus

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>MELBOURNE</b>					
Woolworths	Hass	245	1.88	Cat	Aus
Woolworths	Hass	310	1.88	Cat	Aus
Woolworths	Hass	275	1.88	Cat	Aus
I	Hass	215	1.99	No	Aus
I	Hass	190	1.99	No	Aus
IGA	Hass	220	1.99	No	Aus
IS	Hass	280	1.99	No	NZ
I	Hass	185	1.99	No	NS
Coles	Hass	280	2.50	No	Aus
Coles	Hass	225	2.50	No	Aus
Coles	Hass	260	2.50	No	Aus
I	Hass	350	2.75	Store	Aus
I	Hass	320	2.98	No	Aus
I	Hass	245	2.99	No	Aus
I	Hass	310	3.25	Store	Aus
<b>PERTH</b>					
IGA	Hass	150	0.99	No	Aus
Woolworths	Hass	195	1.30	Cat	Aus
Woolworths	Hass	225	1.30	Cat	Aus
Woolworths	Hass	195	1.30	Cat	Aus
I	Hass	200	1.48	No	Aus
Coles	Hass	180	1.50	No	Aus
Coles	Hass	210	1.50	No	Aus
I	Hass	225	1.50	No	Aus
Coles	Hass	185	1.50	No	Aus
I	Hass	235	1.99	No	Aus
IGA	Hass	215	2.49	No	Aus
IGA	Hass	320	2.99	No	Aus
IS	Hass	275	2.99	No	Aus
IGA	Hass	260	2.99	No	Aus
I	Hass	270	2.99	No	Aus
I	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

### 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