



INFOCADO WEEKLY REPORT: 14th — 20th Nov 2015 (Week 47)

Comments

- The weekly dispatch volume (284,607 trays) was higher than the weeks forecast by about 39,159 trays (16%) (refer P 2 & 3).
- The larger weekly volumes are forecast to continue into the next month, holding steady around 265,000 to 280,000 5.5kg tray eqv. with volumes of Reed appearing signalling the end of the year is fast approaching (refer P 2).
- The largest volume of dispatches originated from Western Australia (172,438 tray eqv.). The Sydney market continues to receive the highest volume (104,613 tray eqv.), size 20 fruit was dominant (59,243 tray eqv.) (refer P 3).
- All packhouses and consolidators are reminded to update their **15 month Seasonal Forecast forms** when available. The 15mth forecast is important as AAL uses this data to lock in the pre-harvest forecast before each region commences harvest (as now shown on P 4).
- For regions that have finished harvest for the season beginning in 2015, AAL has started to roll over their seasonal forecasts to illustrate the volumes that are estimated for the season beginning in 2016.
- **NB: Week 46 was the last week retail prices were published due to the project ending 17 Nov 2015.**

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Marketing Update: Chefs Love Avocados

Last month we launched the Chefs Love Avocados mini-series! Over the past few months we caught up with a few of Sydney's most renowned chefs about their love of avocados and how they have incorporated them onto their menus at their cafes.

The chefs included Andy Davies from the iconic Bondi Trattoria, Adam Starr from the hip Barmuda in Newtown and Kristian Gamble from the award-winning venue Ripples, right under the Harbour Bridge at Luna Park.

Each chef was filmed preparing their favourite dishes making it very easy for our Avocado Lovers to replicate at home. These delicious dishes included avocado and corn fritters; the ever popular smashed avocado and buffalo milk ricotta; avocado and cured ocean trout; avocado, quinoa and poached egg salad; and avocado with salmon and fennel.

For a full brief please refer to the Guacamole Enewsletter - 16 Oct 2015 & 30 Oct 2015.

Upcoming Holidays

Christmas Day: 25th Dec | Boxing Day: 26th Dec | Boxing Day (Additional): 28th Dec | New Year's Day: 1st Jan | New Year's Day NZ (Additional): 4th Jan |

Report Index

P2: 4 Weekly Forecasts and Import Data | P3: Dispatches | 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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This project has been funded by Horticulture Innovation Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

Yellow shading indicates forecast data Green shading indicates dispatch data

| Forecast Data (Week 47 - 51) | | | | | |
|------------------------------|---------------|------|------|------|-------------|
| Variety | Trays - Total | Bulk | P/Pk | Proc | All - Total |
| | 5.5Kg Eqv | 10Kg | Kg | Kg | 5.5Kg Eqv |

| Week 47 - begin 14/11/2015 | | | | | |
|----------------------------|----------------|---------------|--------------|--------------|----------------|
| Gwen | 400 | | | | 400 |
| Hass | 221,339 | 11,563 | 3,000 | 1,000 | 243,090 |
| Other | | 300 | | | 545 |
| Reed | 1,050 | | | 2,000 | 1,414 |
| Week Total | 222,789 | 11,863 | 3,000 | 3,000 | 245,448 |

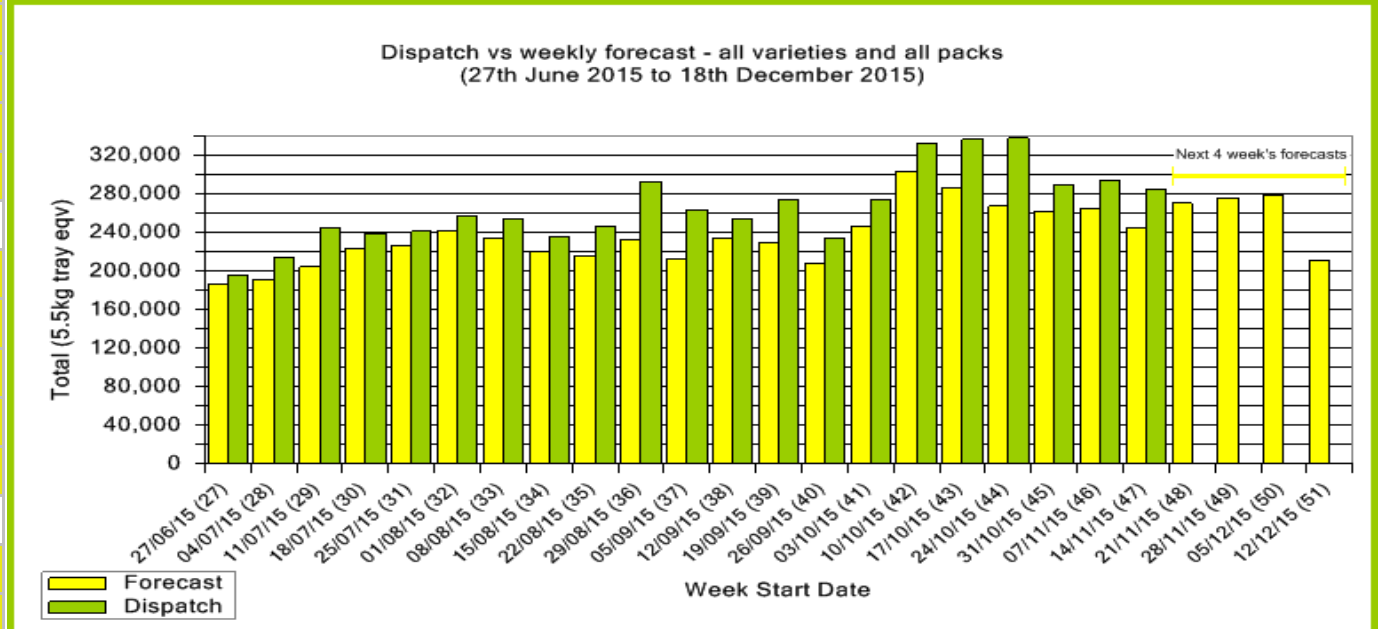
| Week 48 - begin 21/11/2015 | | | | | |
|----------------------------|----------------|---------------|--------------|--------------|----------------|
| Gwen | 400 | | | | 400 |
| Hass | 242,554 | 11,847 | 3,000 | 1,000 | 264,821 |
| Other | 64 | | | | 64 |
| Reed | 4,300 | 200 | | 2,450 | 5,109 |
| Week Total | 247,318 | 12,047 | 3,000 | 3,450 | 270,394 |

| Week 49 - begin 28/11/2015 | | | | | |
|----------------------------|----------------|---------------|--------------|--------------|----------------|
| Hass | 249,002 | 11,613 | 3,000 | 1,000 | 270,844 |
| Lamb Hass | 400 | | | | 400 |
| Reed | 4,300 | 200 | | 2,450 | 5,109 |
| Week Total | 253,702 | 11,813 | 3,000 | 3,450 | 276,352 |

| Week 50 - begin 05/12/2015 | | | | | |
|----------------------------|----------------|---------------|--|------------|----------------|
| Hass | 257,609 | 11,036 | | | 277,674 |
| Reed | 1,000 | 50 | | 100 | 1,109 |
| Week Total | 258,609 | 11,086 | | 100 | 278,783 |

| Week 51 - begin 12/12/2015 | | | | | |
|----------------------------|----------------|--------------|--|--|----------------|
| Hass | 197,245 | 7,521 | | | 210,920 |
| Week Total | 197,245 | 7,521 | | | 210,920 |

| Dispatch Data (Week 47 - begin 14/11/2015) | | | | |
|--|----------------|---------------|---------------|----------------|
| Variety | Trays | Bulk | P/PK | 5.5Kg Eqv |
| | 5.5Kg Eqv | 10Kg | Kg | Total Trays |
| Gem | 67 | 1 | | 69 |
| Gwen | 378 | 22 | | 418 |
| Hass | 248,381 | 16,774 | 10,296 | 280,751 |
| Other | 160 | 8 | | 175 |
| Reed | 856 | 301 | | 1,403 |
| Wurtz | 1,733 | 32 | | 1,791 |
| Total | 251,575 | 17,138 | 10,296 | 284,607 |



New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) July 2015 - March 2016

| Export Destination | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Total to Date |
|---|---------------|---------------|----------------|----------------|----------------|----------|----------|----------|----------|------------------|
| NZ-Aus - Pre Season Forecast ¹ | 17,160 | 109,680 | 384,240 | 330,990 | 378,100 | 496,690 | 463,096 | 232,050 | 3,520 | 2,415,526 |
| NZ-Aus - Disp + Mthly Forecast ² | 16,725 | 80,567 | 191,340 | 420,417 | 389,454 | 524,894 | 451,047 | 38,780 | 0 | 2,113,224 |
| Australia (from ABS) | 27,589 | 107,037 | 232,868 | 444,023 | | | | | | 811,517 |
| USA ³ | 0 | 0 | 0 | 0 | | | | | | 0 |
| Japan ³ | 0 | 0 | 4,212 | 12,637 | | | | | | 16,849 |
| Other Asia ³ | 973 | 6,926 | 28,010 | 44,381 | | | | | | 80,290 |
| Total Dispatch (Infocado + 3) | 17,698 | 87,493 | 223,562 | 477,435 | 257,879 | 0 | 0 | 0 | 0 | 1,064,067 |

1 Source: Infocado AAL, Seasonal Forecast provided at start of season
 2 Source: Infocado AAL, Mthly Dispatch + Updated Mthly Seasonal Forecast (dispatch is updated at the end of each month)
 3 Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port

Industry Dispatches By Origin Region and Count Size : 14th November - 20th November 2015 (Wk 47)

| Origin Region | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | Trays - Total | Bulk | P/PK | 5.5Kg Eqv Trays All |
|----------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|---------------|---------------------|
| | <16 | 16 | 18 | 20 | 23 | 25 | 28 | 28+ | 5.5Kg Eqv | 10Kg | Kg | Total |
| Central NSW | | 358 | 412 | 825 | 438 | 401 | 355 | | 2,789 | 733 | | 4,122 |
| New Zealand | | 3,722 | 7,980 | 17,268 | 16,062 | 21,710 | 8,589 | 21,806 | 97,137 | | | 97,137 |
| South Qld | 624 | | | | | | | | 624 | 288 | | 1,148 |
| Sunshine Coast | 6 | 80 | 90 | 109 | 228 | 311 | 212 | | 1,036 | 725 | | 2,354 |
| Tri State | 95 | 632 | 1,846 | 1,717 | 1,214 | 781 | 384 | 76 | 6,745 | 365 | | 7,409 |
| WA/NT | 1,132 | 5,472 | 15,953 | 39,324 | 31,136 | 27,819 | 18,672 | 3,736 | 143,244 | 15,027 | 10,296 | 172,438 |
| | 1,857 | 10,264 | 26,281 | 59,243 | 49,078 | 51,022 | 28,212 | 25,618 | 251,575 | 17,138 | 10,296 | 284,607 |

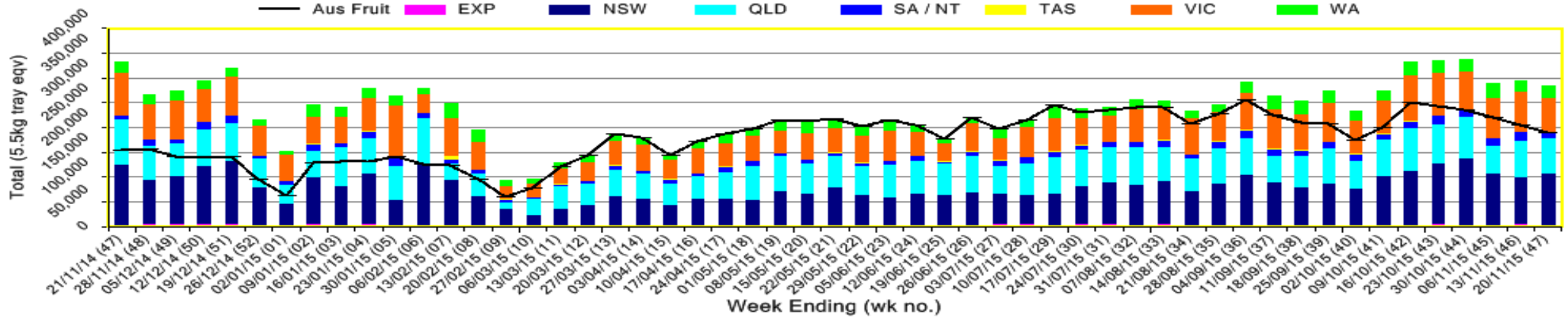
Origin of Avocado 

Destination of Avocado 

Industry Dispatches By Destination State and Count Size : 14th November - 20th November 2015 (Wk 47)

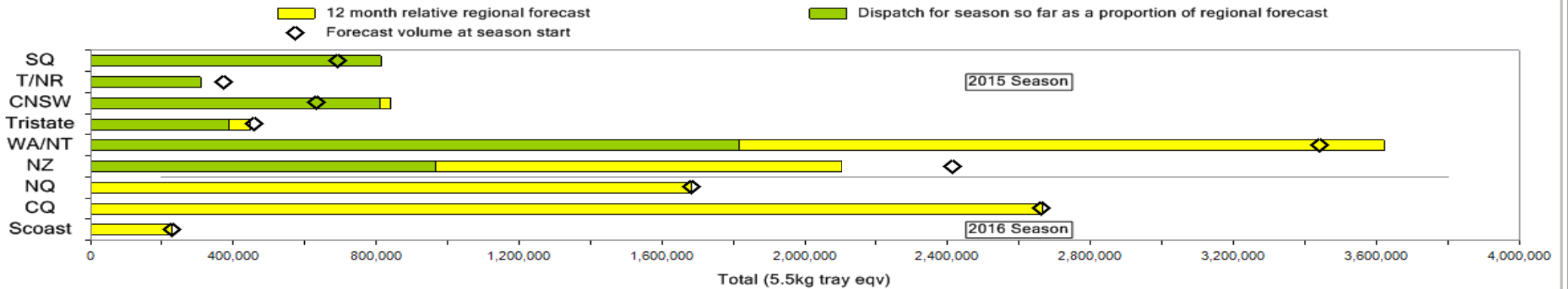
| Dest. State | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | Trays - Total | Bulk | P/PK | 5.5Kg Eqv Trays All |
|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|---------------|---------------------|
| | <16 | 16 | 18 | 20 | 23 | 25 | 28 | 28+ | 5.5Kg Eqv | 10Kg | Kg | Total |
| EXP | 50 | | | | | | | 320 | 370 | 550 | | 1,370 |
| NSW | 899 | 3,195 | 6,619 | 27,897 | 19,425 | 18,997 | 5,197 | 9,911 | 92,140 | 6,860 | | 104,613 |
| QLD | 161 | 4,264 | 9,134 | 14,375 | 13,174 | 13,511 | 7,072 | 8,290 | 69,981 | 1,014 | 6,864 | 73,073 |
| SA / NT | 63 | 79 | 51 | 290 | 1,978 | 4,205 | 2,203 | 216 | 9,085 | 880 | 2,148 | 11,076 |
| TAS | | | | | | 456 | 760 | | 1,216 | | | 1,216 |
| VIC | 364 | 2,404 | 10,143 | 14,492 | 10,396 | 10,347 | 3,982 | 4,087 | 56,215 | 6,023 | | 67,166 |
| WA | 320 | 322 | 334 | 2,189 | 4,105 | 3,506 | 8,998 | 2,794 | 22,568 | 1,811 | 1,284 | 26,094 |
| Total | 1,857 | 10,264 | 26,281 | 59,243 | 49,078 | 51,022 | 28,212 | 25,618 | 251,575 | 17,138 | 10,296 | 284,607 |

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 10,691,838 5.5kg tray eqv



NB: The graph below utilises the seasonal forecast data (without adjustment). The total of each bar in the below graph is a result of; Total Monthly Dispatches to date plus the remaining Seasonal Forecast which can be updated monthly by contributors.

Percentage dispatched by region (Based on seasonal forecast - 2015)



Week 47 Contributors - Packhouses

| | |
|--------------------------------------|---|
| Natures Fruit Company (Consolidator) | Avonova (WA) |
| The Evolution (Consolidator) | Delroy Orchards (WA) |
| Avocado Industry Council (NZAGA) | Advance Packing & Marketing Services P/L (WA) |
| Golden Hill Packing Pty Ltd (TRI) | Golden Hill Avocados (WA) |
| KV & JM Lehmann (TRI) | VP & EA Farrell (WA) |
| Justin Loffler (TRI) | CNSW: Less than 3 contributors |
| Klingbiel Family Trust (TRI) | TNR: Less than 3 contributors |
| Mariners Rest (WA) | |

Week 47 Contributors - Wholesalers

| | |
|---|---|
| Costa Farms (Adelaide) | Sinclair & Antico (Aust) Pty Ltd (Sydney) |
| Costa Farms (Brisbane) | Southern Cross Produce Pty Ltd (Sydney) |
| De Luca Banana Marketing Pty Ltd (Brisbane) | The La Manna Group (Adelaide) |
| Etherington (Perth) | The La Manna Group (Brisbane) |
| Exotic Fruit Traders (Sydney) | The La Manna Group (Melbourne) |
| Fresh Choice WA Pty Ltd (Perth) | United Fresh (Adelaide) |
| Fresh Express Produce Pty Ltd (Perth) | VB Sculli (Melbourne) |
| Murray Bros (Brisbane) | 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 | 70,958 | | | 70,958 | 4,896 | | | 4,896 | 8,902 | | | | | | 79,860 | | | 79,860 |
| Total non supermarket sales | 4,655 | | | 4,655 | 293 | | | 293 | 533 | | | | | | 5,188 | | | 5,188 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 75,613 | | | 75,613 | 5,189 | | | 5,189 | 9,435 | | | | | | 85,048 | | | 85,048 |
| Total Stock on Hand | 2,403 | | | 2,403 | 96 | | | 96 | 175 | | | | | | 2,578 | | | 2,578 |
| QLD | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 48,546 | | | 48,546 | 672 | | | 672 | 1,222 | 6,024 | | | 6,024 | 1,095 | 50,863 | | | 50,863 |
| Total non supermarket sales | 2,140 | | | 2,140 | 314 | | | 314 | 571 | 96 | | 850 | 946 | 172 | 2,728 | | 155 | 2,883 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 50,686 | | | 50,686 | 986 | | | 986 | 1,793 | 6,120 | | 850 | 6,970 | 1,267 | 53,591 | | 155 | 53,746 |
| Total Stock on Hand | 27,712 | | | 27,712 | 358 | | | 358 | 651 | | | | | | 28,363 | | | 28,363 |
| SA & TAS | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 12,978 | | | 12,978 | 192 | | | 192 | 349 | | | | | | 13,327 | | | 13,327 |
| Total non supermarket sales | 6,008 | | 242 | 6,250 | 1,315 | | 159 | 1,474 | 2,680 | | | | | | 8,399 | | 531 | 8,930 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 18,986 | | 242 | 19,228 | 1,507 | | 159 | 1,666 | 3,029 | | | | | | 21,726 | | 531 | 22,257 |
| Total Stock on Hand | 14,431 | | 907 | 15,338 | 790 | | 488 | 1,278 | 2,324 | | | | | | 15,867 | | 1,794 | 17,662 |
| VIC | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | Full data set not displayed because not enough VIC wholesalers contributed data this week | | | | | | | | | | | | | | | | | |
| Total non supermarket sales | Full data set not displayed because not enough VIC wholesalers contributed data this week | | | | | | | | | | | | | | | | | |
| Total exports | Full data set not displayed because not enough VIC wholesalers contributed data this week | | | | | | | | | | | | | | | | | |
| Total sales | 41,359 | | | 41,359 | 3,725 | | | 3,725 | 6,773 | 45 | | | 45 | 8 | 48,140 | | | 48,140 |
| Total Stock on Hand | | | | | | | | | | | | | | | | | | |
| WA | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 12,803 | | | 12,803 | 1,267 | | | 1,267 | 2,304 | | | | | | 15,107 | | | 15,107 |
| Total non supermarket sales | 2,705 | | | 2,705 | 1,407 | | | 1,407 | 2,558 | | | | | | 5,263 | | | 5,263 |
| Total exports | 370 | | | 370 | 550 | | | 550 | 1,000 | | | | | | 1,370 | | | 1,370 |
| Total sales | 15,878 | | | 15,878 | 3,224 | | | 3,224 | 5,862 | | | | | | 21,740 | | | 21,740 |
| Total Stock on Hand | 4,121 | | | 4,121 | 489 | | | 489 | 889 | | | | | | 5,010 | | | 5,010 |
| Total | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 179,113 | | | 179,113 | 9,912 | | | 9,912 | 18,022 | 6,024 | | | 6,024 | 1,095 | 198,230 | | | 198,230 |
| Total non supermarket sales | 23,039 | | 242 | 23,281 | 4,169 | | 159 | 4,328 | 7,869 | 141 | | 850 | 991 | 180 | 30,645 | | 686 | 31,330 |
| Total exports | 370 | | | 370 | 550 | | | 550 | 1,000 | | | | | | 1,370 | | | 1,370 |
| Total sales | 202,522 | | 242 | 202,764 | 14,631 | | 159 | 14,790 | 26,891 | 6,165 | | 850 | 7,015 | 1,275 | 230,245 | | 686 | 230,930 |
| Total Stock on Hand | 55,480 | | 907 | 56,387 | 1,733 | | 488 | 2,221 | 4,038 | 40 | | | 40 | 7 | 58,638 | | 1,794 | 60,432 |

Weekly National Sales

