



INFOCADO WEEKLY REPORT: 22nd — 28th November 2014 (Wk 48)



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Comments

- Over the last 2 months both Sydney and Melbourne suppliers have increased their total throughout which has helped move the industry's significantly larger production volume (refer P 2).
- The weekly dispatch levelled out to be in line with the volume that was forecast for the week. The difference being only 1000 5.5kg tray eqv. (refer P 3). AAL would like to thank all contributors for providing their data
- The four weekly forecast continues to indicate lower supply volumes are expected over the next month in comparison to the previous 2 months (refer P 3).
- The average retail price per Hass avocado is generally holding firm across all cities. Woolworths is running catalogue specials in Melbourne and Sydney. Coles is running similar catalogue specials in Melbourne and Brisbane (refer P 6-8).

IGA Metcash Get Serious About Their Avocado Sales

For the 4 weeks of October the IGA ran a competition for their produce teams. The focus being specifically on Avocados to increase sales, raise store level merchandising standards and to increase customer avocado consumption. The ultimate goal for the longer term was to engage consumers to secure ongoing avocado purchasing throughout the summer. For encouragement Metcash ran a national competition pegging state against state for the right to be named the 2014 MFG Avocado Champions and be awarded the inaugural Australian Avocado Golden Avocado Trophy.

To support IGA with this activity Australian Avocados developed point of sale kits for each of the 1,361 stores involved. Each kit included 50 brochures of "Your Guide to Loving Your avocado", an A3 "Avocados are Delicate" ripening poster and an A3 "Avocado Handling: Retail". The educational materials were aimed at educating both staff and customers on industry best practice for avocado fruit handling.

It was reported by IGA that they were more than happy with the promotion "in the 4 weeks the teams posted some truly fantastic results. Overall volume is up 23.5% with SA and WA recording increases north of 40%". Queensland was the outright winning state and Victoria the runner up. In comments back to Australian Avocados Luke added "Thank you for your support on this, it's been a great success".

For a full brief please refer to the Guacamole Enewsletter - 5/12/2014

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:

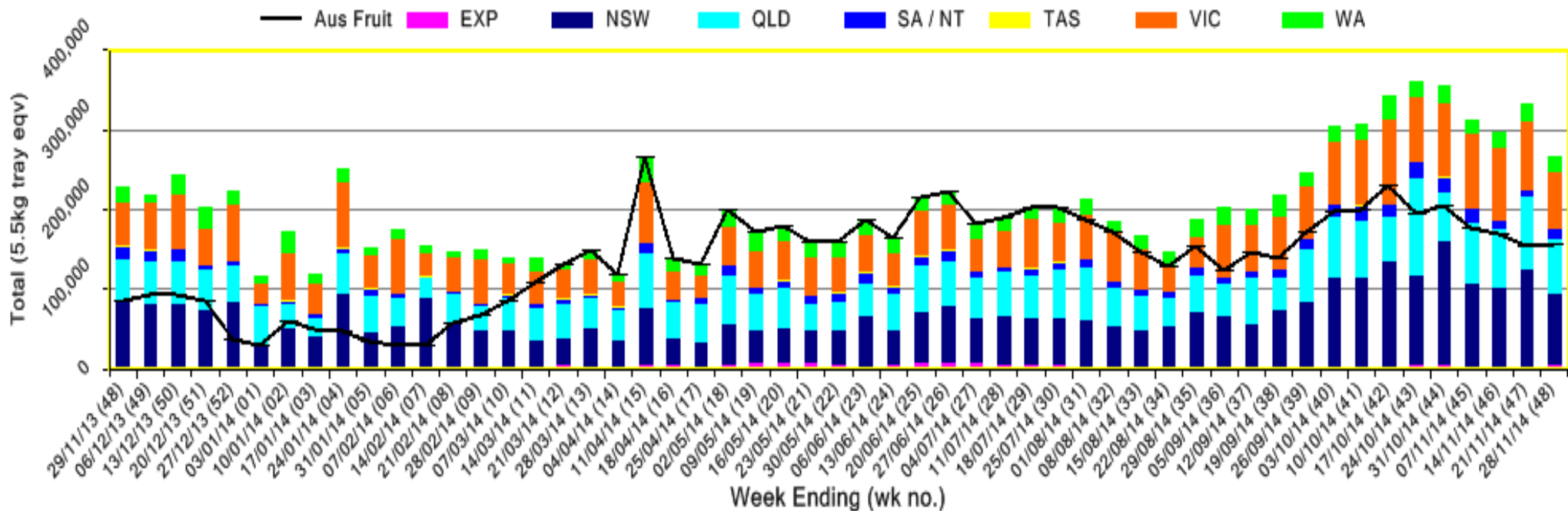
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 22nd November - 28th November 2014 (Wk 48)

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			30					2,720	2,750	960				4,495
NSW	652	4,472	9,549	23,036	17,029	19,015	6,617	6,134	86,504	2,038				90,209
QLD	144	2,988	6,981	13,842	13,067	14,471	7,590	6,194	65,277	670	6,336		2,000	68,011
SA / NT	629	1,896	2,222	1,868	345	378	3,160		10,498	743				11,849
VIC	377	3,396	7,622	18,401	15,548	14,213	4,725	2,128	66,410	3,011	148			71,912
WA	650	412	425	1,361	2,897	7,874	4,855	93	18,567	861	3,156	40		20,713
Total	2,452	13,164	26,829	58,508	48,886	55,951	26,947	17,269	250,006	8,283	9,640	40	2,000	267,190

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2014 to date = 9,734,614 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 48 - 52)

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

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
Week Total	248,212	7,684	15,500	20	4,000	2,000	266,096

Week 49 - begin 29/11/2014

Hass	284,604	8,880	15,500	40			303,574
Lamb Hass	144	400					871
Reed	1,100	220			2,000	2,000	2,228
Week Total	285,848	9,500	15,500	40	2,000	2,000	306,674

Week 50 - begin 06/12/2014

Hass	276,484	8,955	5,500	40			293,773
Lamb Hass	432	400					1,159
Reed	1,100	220			2,000		1,864
Week Total	278,016	9,575	5,500	40	2,000		296,796

Week 51 - begin 13/12/2014

Hass	249,504	7,430	5,000	40			263,929
Lamb Hass	432	400					1,159
Reed	1,100	220			2,000		1,864
Week Total	251,036	8,050	5,000	40	2,000		266,952

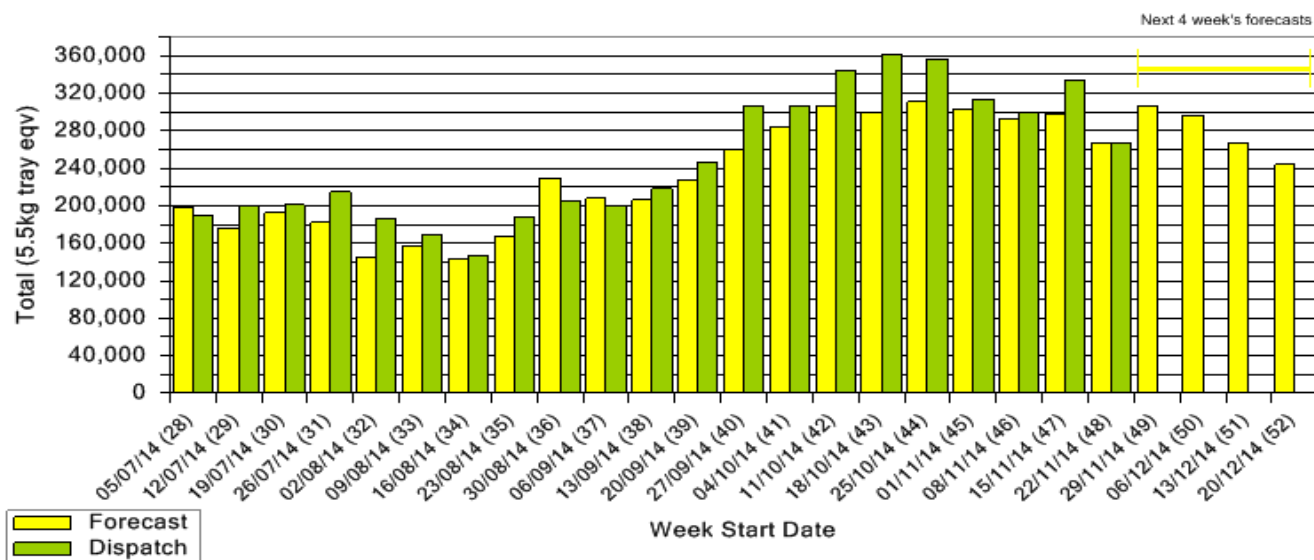
Week 52 - begin 20/12/2014

Hass	227,993	6,350	10,000	10			241,358
Lamb Hass	432	220					832
Reed	1,000	200			2,000		1,728
Week Total	229,425	6,770	10,000	10	2,000		243,918

Dispatch Data (Week 48 - begin 22/11/2014)

Variety	Trays	Bulk	P/PK	Oil	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Hass	247,675	7,740	9,640	40		263,508
Lamb Hass	1,253	412				2,002
Reed	1,078	131			2,000	1,680
Total	250,006	8,283	9,640	40	2,000	267,190

Dispatch vs weekly forecast - all varieties and all packs
(5th July 2014 to 26th December 2014)

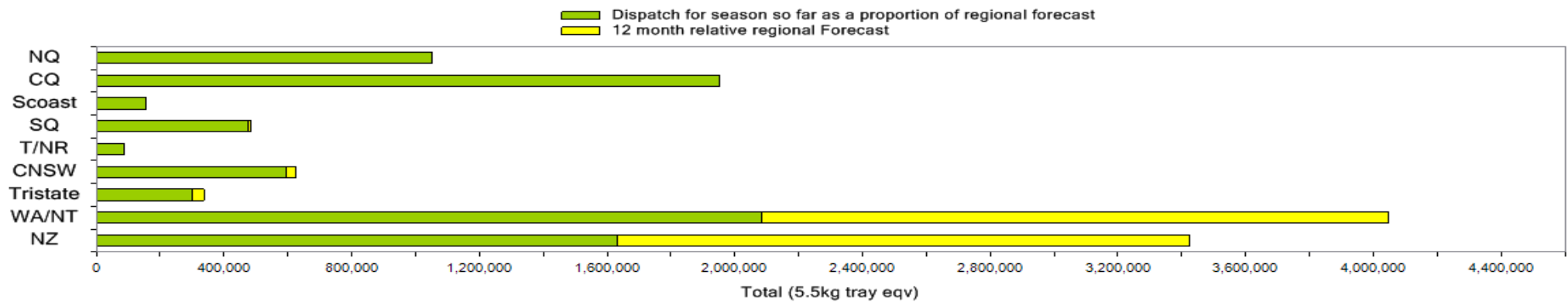


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

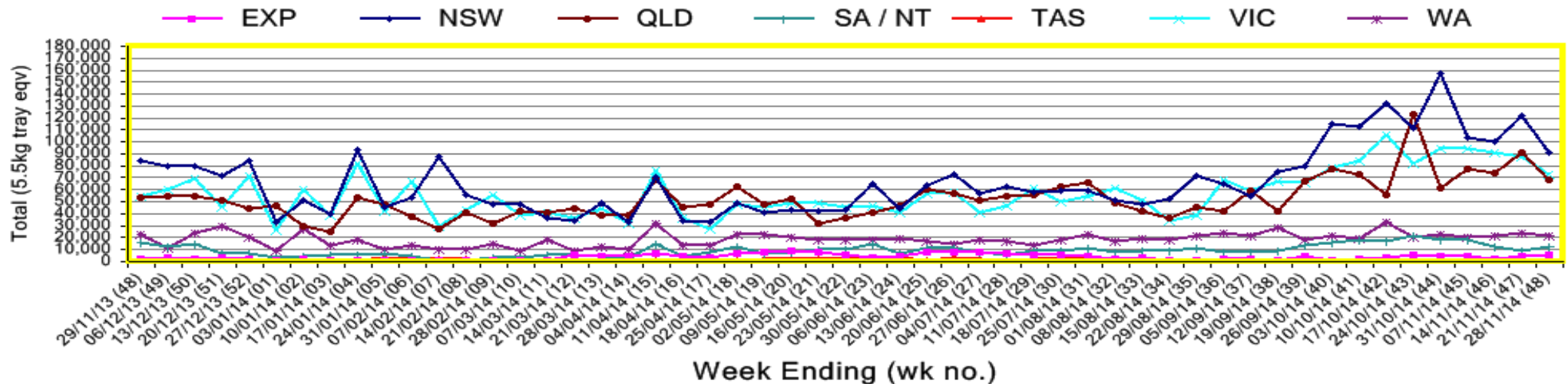
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	443,740	379,760	393,210	552,900	563,784	252,876	5,280	2,949,402
Australia (from Infocado)	123,747	293,918	653,001	561,186						1,631,852
USA¹	6	12,687	38,006							50,699
Japan¹	1,916	12,999	21,753							36,668
Other Asia¹	7,609	43,179	68,125							118,913
Total	133,278	362,783	780,885	561,186						1,838,132

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 = 9,734,614 5.5kg tray eqv



Week 48 contributors - Packhouses

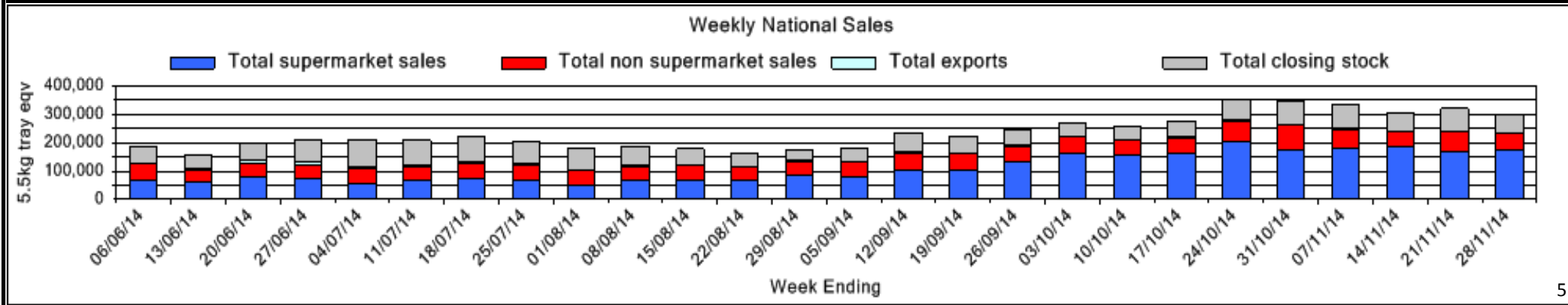
Natures Fruit Company (Consolidator)	Box Organics (WA)
Simpson Farms Pty Ltd (Consolidator)	Delroy Orchards (WA)
The Avolution (Consolidator)	Mariners Rest (WA)
Avocado Industry Council (NZAGA)	West Aussie Avos (WA)
The Avolution (SQ)	CNSW: Less than 3 contributors
Advance Packing & Marketing Services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

Week 48 contributors - Wholesalers

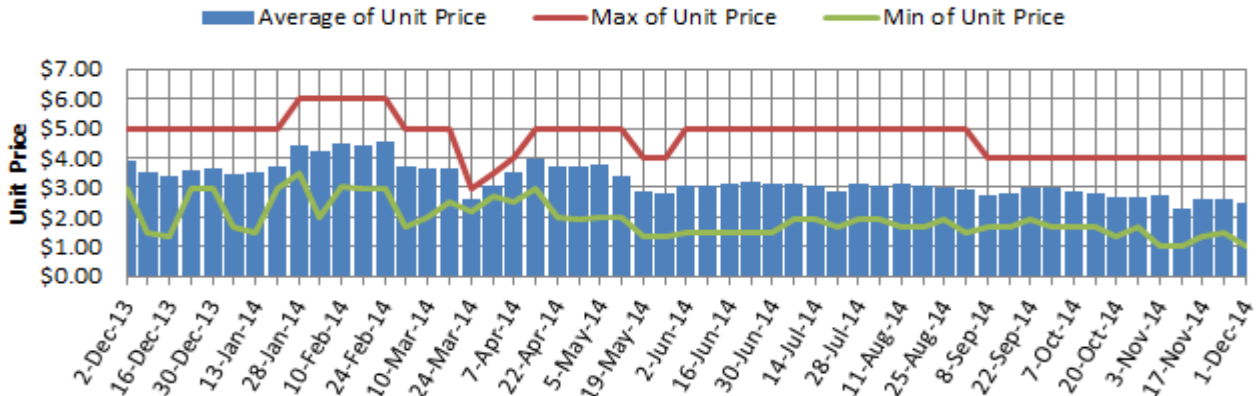
Allcrops Pty Ltd (Sydney)	Murray Bros (Brisbane)
C & S Ponte Produce Pty Ltd (Melbourne)	Sculli & Co Pty Ltd (Melbourne)
Costa Farms (Adelaide)	The La Manna Group (Adelaide)
Costa Farms (Brisbane)	The La Manna Group (Brisbane)
Costa Farms (Melbourne)	The La Manna Group (Melbourne)
Etherington (Perth)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

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

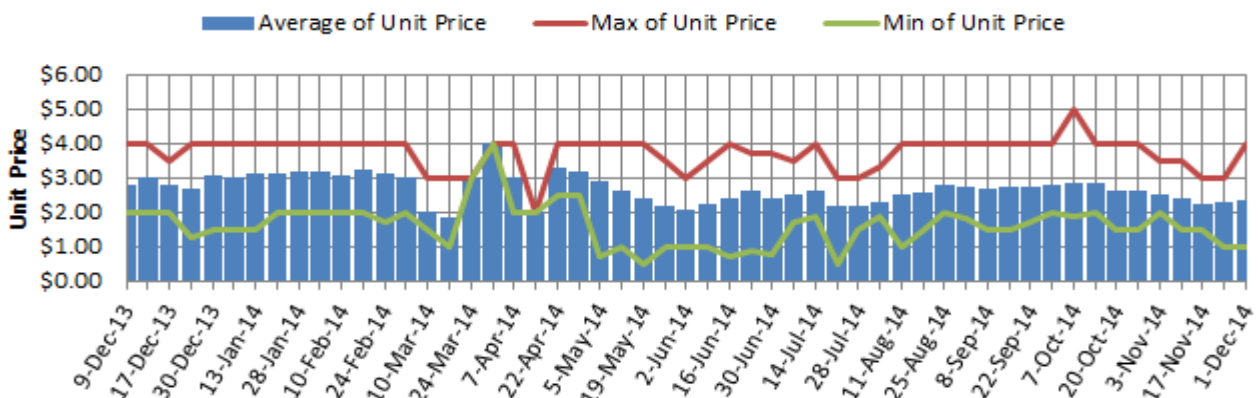
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW	Full data set not displayed because not enough NSW wholesalers contributed data this week																	
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	56,897		180	57,077	1,212			1,212	2,204						59,101		180	59,281
Total Stock on Hand																		
QLD																		
Total supermarket sales	38,977		288	39,265	670			670	1,218	5,400			5,400	982	41,177		288	41,465
Total non supermarket sales	18,866			18,866	913			913	1,660						20,526			20,526
Total exports																		
Total sales	57,843		288	58,131	1,583			1,583	2,878	5,400			5,400	982	61,703		288	61,991
Total Stock on Hand	25,694			25,694	42			42	76						25,770			25,770
SA & TAS																		
Total supermarket sales	16,524			16,524	288			288	524						17,048			17,048
Total non supermarket sales	5,613		159	5,772	1,221		4	1,225	2,227						7,833		166	7,999
Total exports																		
Total sales	22,137		159	22,296	1,509		4	1,513	2,751						24,881		166	25,047
Total Stock on Hand	9,752		181	9,933	1,433		33	1,466	2,665						12,357		241	12,598
VIC																		
Total supermarket sales	41,592			41,592	1,152			1,152	2,095						43,687			43,687
Total non supermarket sales	16,014		877	16,891	1,790		267	2,057	3,740	941			941	171	19,440		1,362	20,802
Total exports																		
Total sales	57,606		877	58,483	2,942		267	3,209	5,835	941			941	171	63,126		1,362	64,489
Total Stock on Hand	15,952		1,271	17,223	1,077		144	1,221	2,220	834			834	152	18,062		1,533	19,595
WA																		
Total supermarket sales	14,897			14,897	362			362	658	3,156			3,156	574	16,129			16,129
Total non supermarket sales	3,640			3,640	494		17	511	929	120			120	22	4,560		31	4,591
Total exports	2,750			2,750	960			960	1,745						4,495			4,495
Total sales	21,287			21,287	1,816		17	1,833	3,333	3,276			3,276	596	25,184		31	25,215
Total Stock on Hand	3,270			3,270	281			281	511	117			117	21	3,802			3,802
Total																		
Total supermarket sales	163,809		468	164,277	3,238			3,238	5,887	8,556			8,556	1,556	171,252		468	171,720
Total non supermarket sales	49,211		1,036	50,247	4,864		288	5,152	9,367	1,061			1,061	193	58,248		1,560	59,807
Total exports	2,750			2,750	960			960	1,745						4,495			4,495
Total sales	215,770		1,504	217,274	9,062		288	9,350	17,000	9,617			9,617	1,749	233,995		2,028	236,023
Total Stock on Hand	58,609		1,452	60,061	3,040		177	3,217	5,849	951			951	173	64,309		1,774	66,083



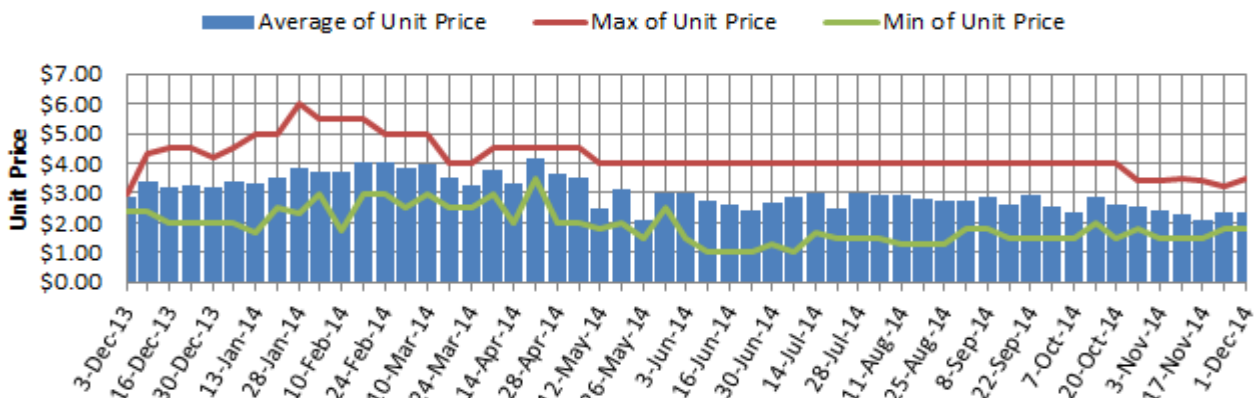
Hass Avocado Average Retail Prices - Sydney



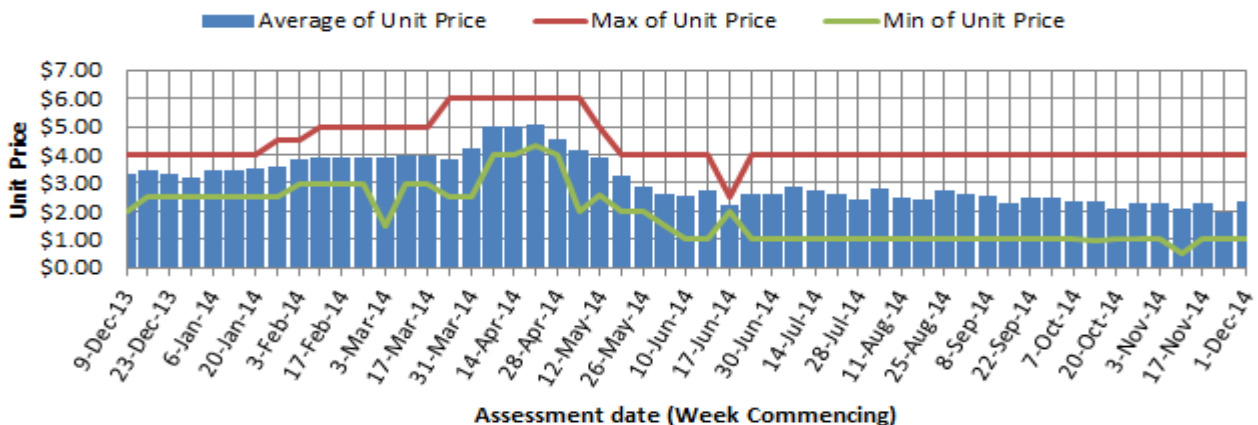
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

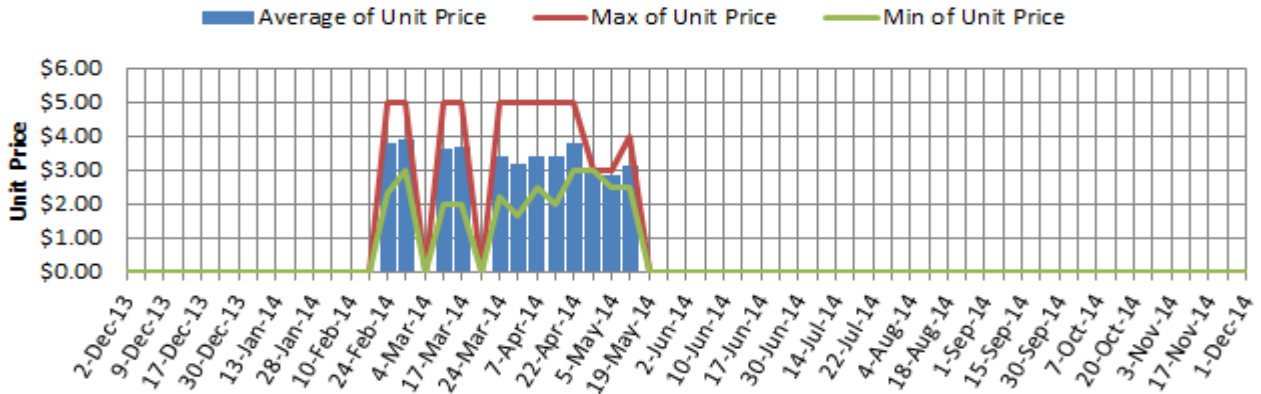


Hass Avocado Average Retail Prices - Perth

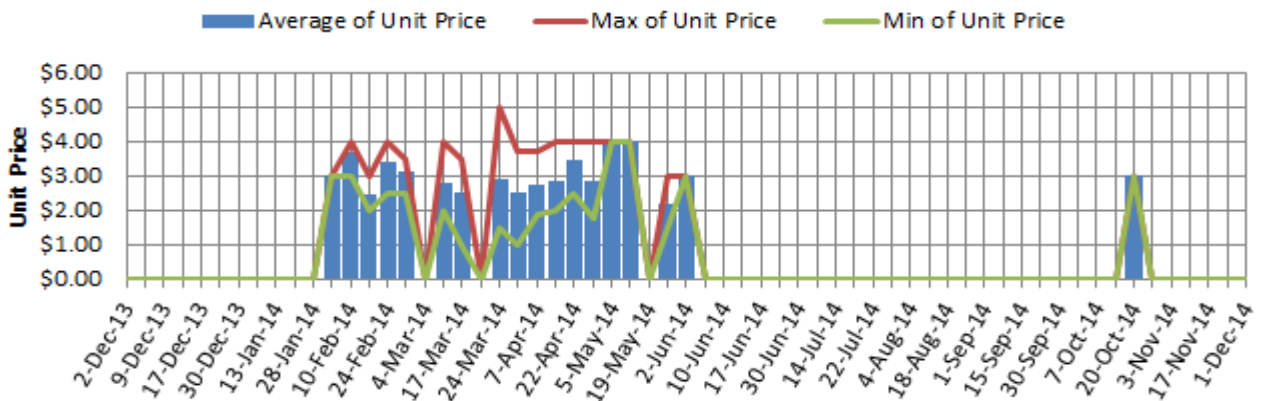


Assessment date (Week Commencing)

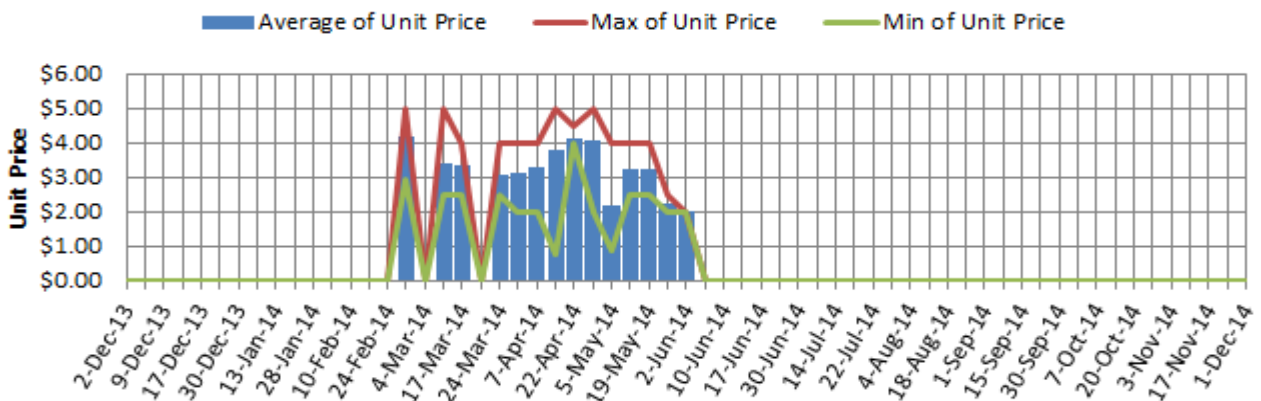
Shepard Avocado Average Retail Prices - Sydney



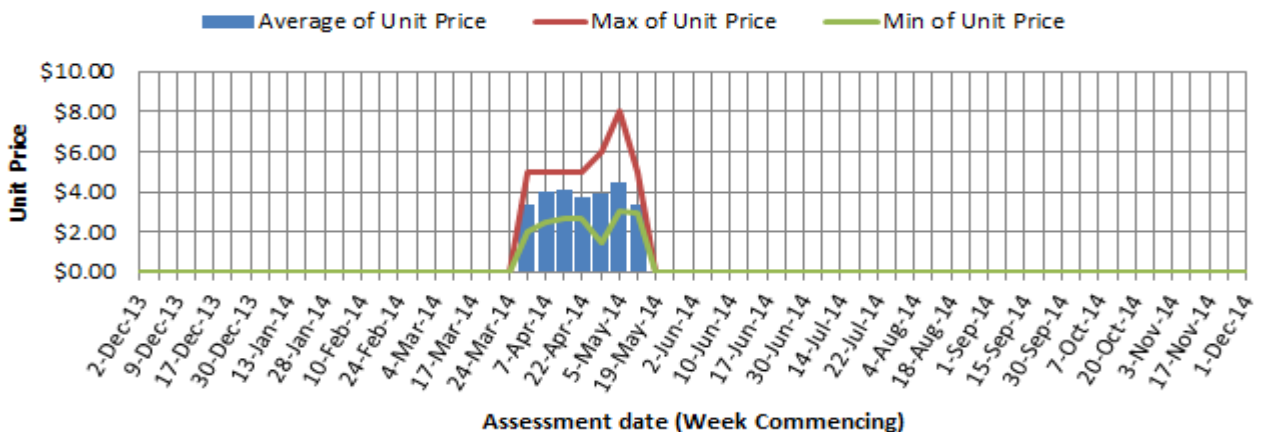
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 1st December 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
Woolworths	Hass	260	1.68	Cat	Aus	Coles	Hass	310	1.80	Cat	Aus
Woolworths	Hass	260	1.68	Cat	NZ	Coles	Hass	200	1.80	Cat	Aus
Woolworths	Hass	280	1.68	Cat	Aus	Coles	Hass	240	1.80	Cat	Aus
Coles	Hass	260	1.80	No	Aus	I	Hass	265	1.99	No	NZ
Coles	Hass	280	1.80	No	Aus	IGA	Hass	220	1.99	No	NS
Coles	Hass	270	1.80	No	Aus	I	Hass	190	1.99	No	NZ
I	Reed	400	2.00	Store	Aus	Woolworths	Hass	270	2.28	Cat	Aus
Foodworks	Hass	280	2.49	No	NZ	Woolworths	Hass	220	2.28	Cat	Aus
I	Hass	320	2.50	No	Mixed	Woolworths	Hass	270	2.28	Cat	Aus
I	Reed	390	2.50	No	Aus	I	Hass	180	2.40	No	Aus
I	Hass	320	2.50	Store	Aus	I	Hass	310	2.98	No	Aus
I	Reed	410	2.50	No	Aus	I	Hass	360	2.99	Store	Aus
I	Hass	310	2.50	Store	NZ	I	Hass	270	2.99	No	Aus
IGA	Hass	210	2.98	No	NZ	I	Hass	360	3.50	No	Aus
I	Hass	260	2.99	No	Aus	PERTH					
I	Hass	260	2.99	No	Aus	I	Hass	220	1.48	No	Aus
I	Hass	270	2.99	No	Aus	Coles	Hass	210	1.50	No	Aus
IGA	Hass	240	3.49	No	Aus	Coles	Hass	200	1.50	No	Aus
I	Hass	300	3.99	No	Aus	Coles	Hass	190	1.50	No	Aus
BRISBANE						Woolworths	Hass	225	1.98	No	Aus
I	Hass	190	0.99	Store	NZ	I	Hass	220	1.99	No	Aus
Coles	Hass	250	1.70	Cat	NZ	IGA	Hass	180	2.29	No	Aus
Coles	Hass	240	1.70	Cat	NZ	Woolworths	Hass	205	2.48	No	Aus
Coles	Hass	200	1.70	Cat	NZ	Woolworths	Hass	210	2.48	Store	Aus
I	Hass	205	1.99	No	NZ	I	Hass	255	2.99	No	Aus
I	Hass	260	1.99	Store	NZ	IGA	Hass	305	2.99	No	Aus
Woolworths	Hass	200	2.28	No	Aus	IGA	Hass	280	2.99	No	Aus
Woolworths	Hass	260	2.28	No	Aus	IS	Hass	260	2.99	No	Aus
Woolworths	Hass	230	2.28	No	Aus	IGA	Hass	255	2.99	No	Aus
I	Hass	270	2.50	Store	NZ	I	Hass	230	2.99	No	Aus
I	Hass	164	2.69	No	NZ	I	Hass	220	3.99	No	Aus
IGA	Hass	338	2.99	No	NZ						
I	Hass	372	2.99	No	Aus						
I	Hass	240	3.00	No	Aus						
I	Hass	270	4.00	Store	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

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