



# INFOCADO WEEKLY REPORT: 29th November—5th December 2014 (Wk 49)



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## Comments

- Of volumes entering the domestic market size 20 fruit has been dominant closely followed by 25's and 23's respectively (refer P 2).
- Sydney and Melbourne markets continue to move the larger volumes maintaining a steady level of stock on hand (refer P 2 & 5).
- The weekly dispatch volume was lower than forecast, resulting in approx. 30,000 5.5kg trays eqv. less than estimated. Volumes are forecast to continue to ease into the Christmas period (refer P 3).
- Minor volumes of Lamb Hass and Reed continue to make an appearance (refer P 3).
- As volumes entering the marketplace lighten, store specials have become sporadic. The average retail price is starting to rise with monitored retail prices peaking at \$3.99 across Sydney, Melbourne and Perth (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 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" poster. 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:

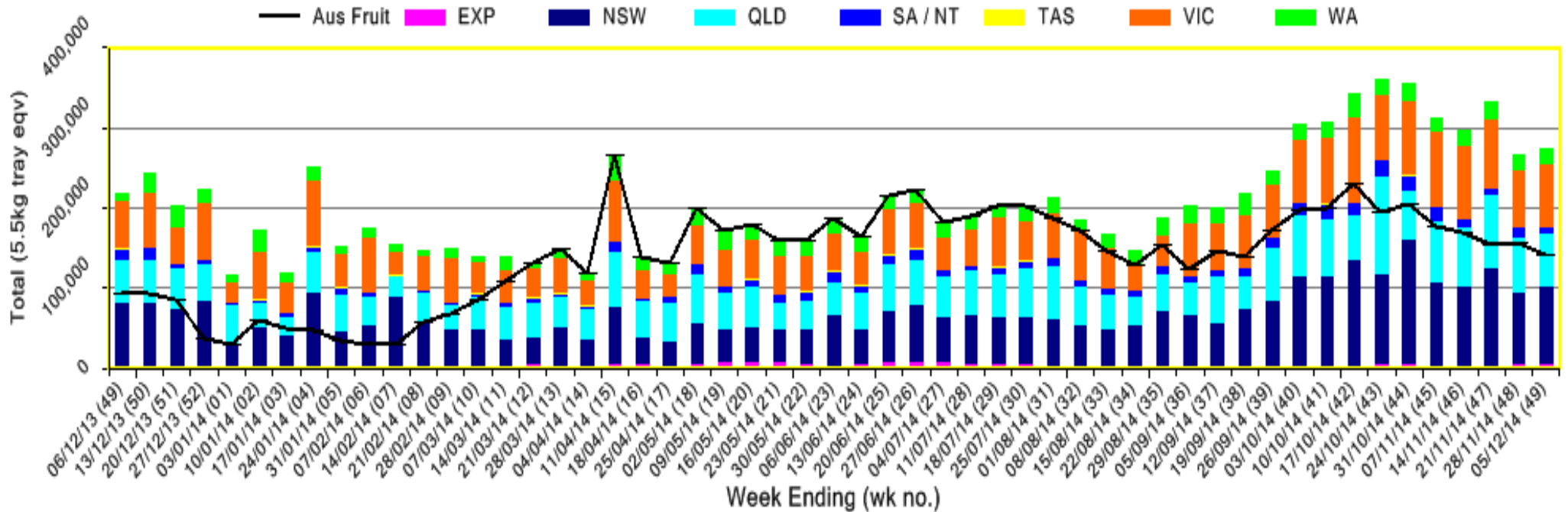
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 29th November - 5th December 2014 (Wk 49)**

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					2,560	2,590	960				4,335
NSW	1,267	6,319	9,325	21,249	17,181	18,801	8,007	7,734	89,883	3,661	2,112			96,923
QLD	144	4,039	6,982	13,510	13,106	13,115	7,946	6,364	65,206	480	2,112		2,000	66,827
SA / NT	323	444	1,406	1,322	320	1,132	3,013		7,960	348				8,593
VIC	385	3,387	10,499	21,183	18,013	12,610	5,237	3,550	74,864	1,871	260			78,313
WA	42	538	884	1,391	2,189	6,623	4,869	115	16,651	1,434	4,436	40		20,072
<b>Total</b>	<b>2,161</b>	<b>14,727</b>	<b>29,126</b>	<b>58,655</b>	<b>50,809</b>	<b>52,281</b>	<b>29,072</b>	<b>20,323</b>	<b>257,154</b>	<b>8,754</b>	<b>8,920</b>	<b>40</b>	<b>2,000</b>	<b>275,063</b>

**Throughput Australian & NZ avocados by destination state  
Throughput 1st January 2014 to date = 10,009,677 5.5kg tray eqv**



Yellow shading indicates forecast data

Green shading indicates dispatch data

**Forecast Data (Week 49 - 1)**

Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Kg	5.5Kg Eqv
<b>Week 49 - begin 29/11/2014</b>							
Hass	284,604	8,880	15,500	40			<b>303,574</b>
Lamb Hass	144	400					<b>871</b>
Reed	1,100	220			2,000	2,000	<b>2,228</b>
<b>Week Total</b>	<b>285,848</b>	<b>9,500</b>	<b>15,500</b>	<b>40</b>	<b>2,000</b>	<b>2,000</b>	<b>306,674</b>

<b>Week 50 - begin 06/12/2014</b>							
Hass	267,104	9,275	5,500	40			<b>284,975</b>
Lamb Hass	720	400					<b>1,447</b>
Reed	1,244	268			2,000		<b>2,095</b>
<b>Week Total</b>	<b>269,068</b>	<b>9,943</b>	<b>5,500</b>	<b>40</b>	<b>2,000</b>		<b>288,517</b>

<b>Week 51 - begin 13/12/2014</b>							
Hass	222,114	7,454	5,000	40			<b>236,583</b>
Lamb Hass	288	268					<b>775</b>
Reed	1,388	268			2,000		<b>2,239</b>
<b>Week Total</b>	<b>223,790</b>	<b>7,990</b>	<b>5,000</b>	<b>40</b>	<b>2,000</b>		<b>239,597</b>

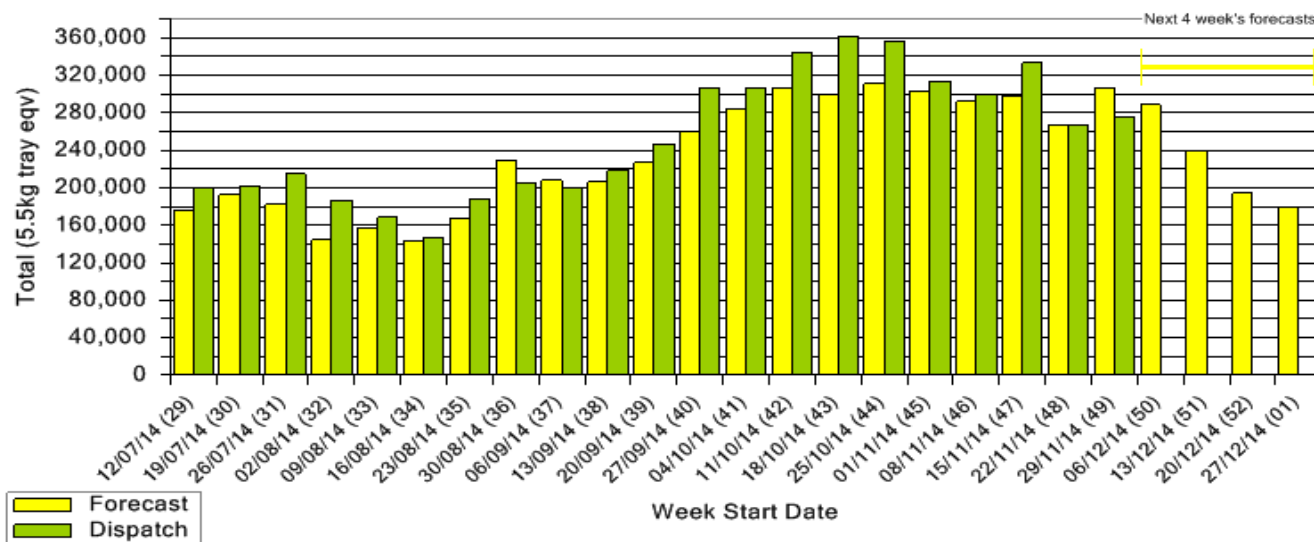
<b>Week 52 - begin 20/12/2014</b>							
Hass	178,113	5,870	10,000	10			<b>190,606</b>
Lamb Hass	1,288	88					<b>1,448</b>
Reed	1,288	248			2,000		<b>2,103</b>
<b>Week Total</b>	<b>180,689</b>	<b>6,206</b>	<b>10,000</b>	<b>10</b>	<b>2,000</b>		<b>194,157</b>

<b>Week 1 - begin 27/12/2014</b>							
Hass	164,879	5,945	5,000	10			<b>176,599</b>
Lamb Hass	500						<b>500</b>
Reed	1,000	200			2,000		<b>1,728</b>
<b>Week Total</b>	<b>166,379</b>	<b>6,145</b>	<b>5,000</b>	<b>10</b>	<b>2,000</b>		<b>178,827</b>

**Dispatch Data (Week 49 - begin 29/11/2014)**

Variety	Trays	Bulk	P/PK	Oil	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Hass	255,718	8,401	8,920	40		<b>272,622</b>
Lamb Hass	144	324				<b>733</b>
Reed	1,292	29			2,000	<b>1,709</b>
<b>Total</b>	<b>257,154</b>	<b>8,754</b>	<b>8,920</b>	<b>40</b>	<b>2,000</b>	<b>275,063</b>

Dispatch vs weekly forecast - all varieties and all packs  
(12th July 2014 to 2nd January 2015)

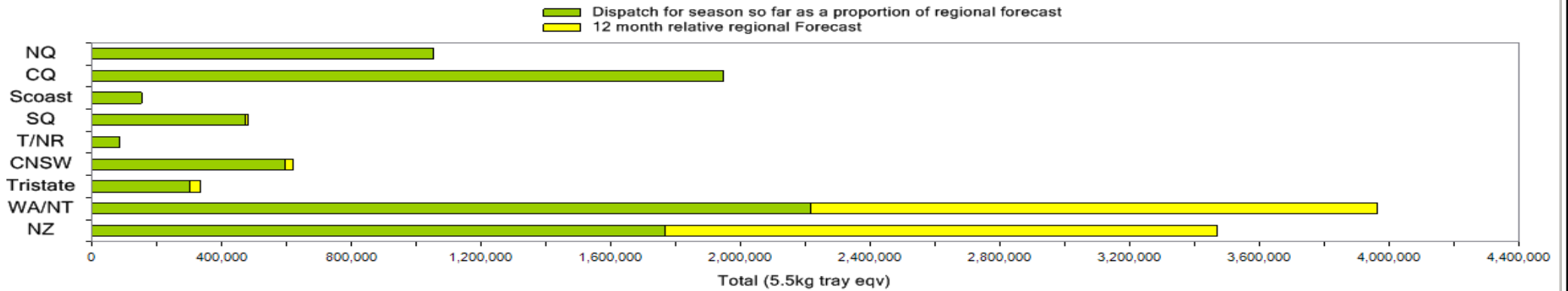


**New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015**

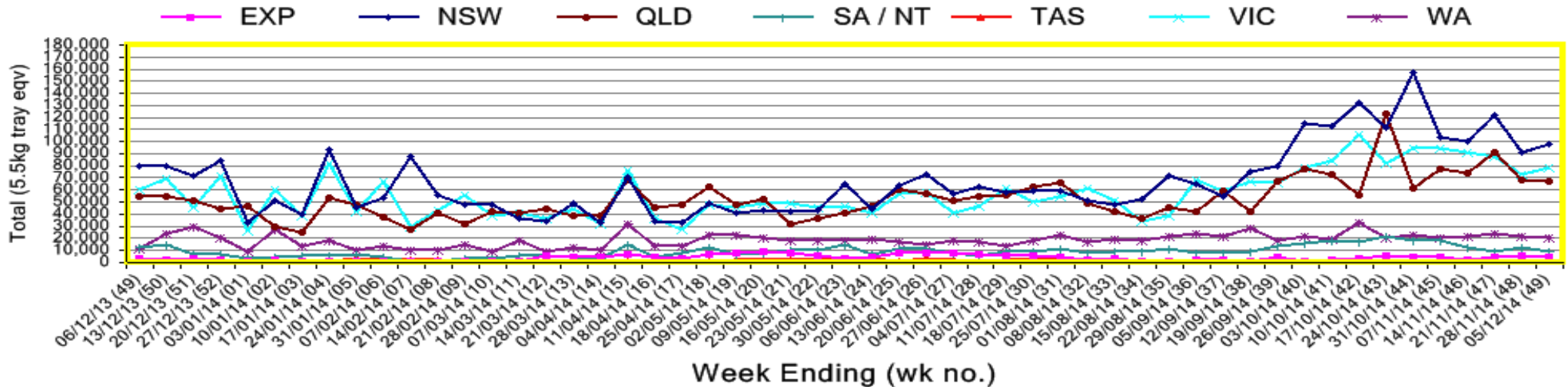
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
<b>NZ Export to Australia Forecast</b>	56,168	301,684	443,740	379,760	393,210	552,900	563,784	252,876	5,280	<b>2,949,402</b>
<b>Australia (from Infocado)</b>	123,747	293,918	653,001	696,871	135,685					<b>1,903,222</b>
<b>USA<sup>1</sup></b>	6	12,687	38,006	195,027						<b>310,735</b>
<b>Japan<sup>1</sup></b>	1,916	12,999	21,753	57,971						<b>113,962</b>
<b>Other Asia<sup>1</sup></b>	7,609	43,179	68,125	52,546						<b>188,974</b>
<b>Total</b>	<b>133,278</b>	<b>362,783</b>	<b>882,733</b>	<b>1,002,415</b>	<b>135,685</b>					<b>2,516,893</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 = 10,009,677 5.5kg tray eqv



**Week 49 contributors - Packhouses**

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

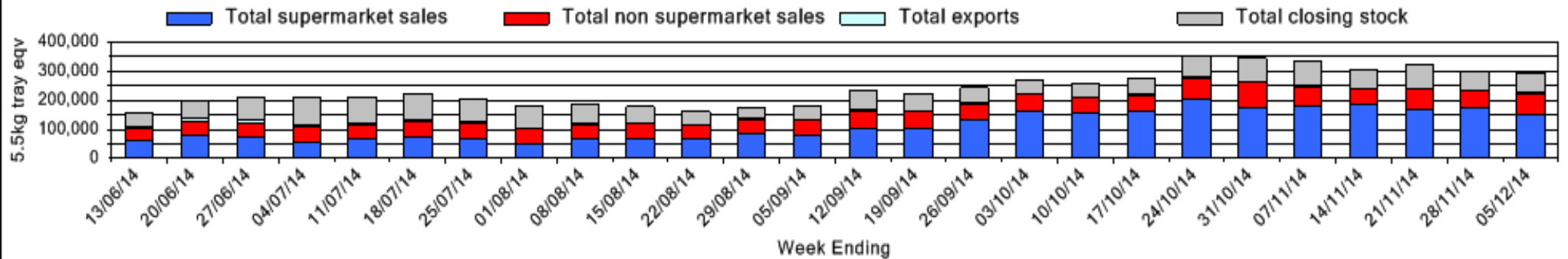
**Week 49 contributors - Wholesalers**

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)
Dykes Bros (Melbourne)	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)	WA Farm Direct (Perth)
Murray Bros (Brisbane)	

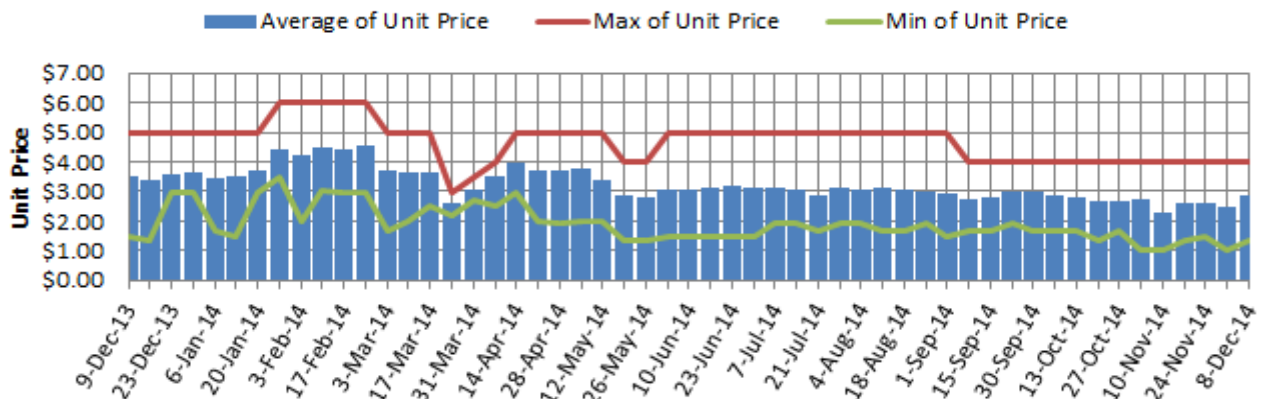
**Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level**

	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	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>	47,352		180	47,532	2,400			2,400	4,364						51,716		180	51,896
<b>Total Stock on Hand</b>																		
QLD																		
<b>Total supermarket sales</b>	34,782		288	35,070	480			480	873	1,584			1,584	288	35,943		288	36,231
<b>Total non supermarket sales</b>	22,470			22,470	806			806	1,465						23,935			23,935
<b>Total exports</b>																		
<b>Total sales</b>	57,252		288	57,540	1,286			1,286	2,338	1,584			1,584	288	59,878		288	60,166
<b>Total Stock on Hand</b>	26,213			26,213	102			102	185						26,398			26,398
SA & TAS																		
<b>Total supermarket sales</b>	11,465			11,465	96			96	175						11,640			11,640
<b>Total non supermarket sales</b>	6,723		104	6,827	828		94	922	1,676						8,228		275	8,503
<b>Total exports</b>																		
<b>Total sales</b>	18,188		104	18,292	924		94	1,018	1,851						19,868		275	20,143
<b>Total Stock on Hand</b>	11,759		77	11,836	1,672		227	1,899	3,453						14,799		490	15,289
VIC																		
<b>Total supermarket sales</b>	41,386			41,386	1,035			1,035	1,882						43,268			43,268
<b>Total non supermarket sales</b>	25,423		2,146	27,569	2,035		357	2,392	4,349	1,290			1,290	235	29,357		2,795	32,152
<b>Total exports</b>																		
<b>Total sales</b>	66,809		2,146	68,955	3,070		357	3,427	6,231	1,290			1,290	235	72,625		2,795	75,420
<b>Total Stock on Hand</b>	18,928		105	19,033	1,482		75	1,557	2,831	485			485	88	21,711		241	21,952
WA																		
<b>Total supermarket sales</b>	11,500			11,500	170			170	309	212			212	39	11,848			11,848
<b>Total non supermarket sales</b>	3,602			3,602	505			505	918	117			117	21	4,541			4,541
<b>Total exports</b>	2,590			2,590	960			960	1,745						4,335			4,335
<b>Total sales</b>	17,692			17,692	1,635			1,635	2,973	329			329	60	20,725			20,725
<b>Total Stock on Hand</b>	2,622			2,622	40			40	73	240			240	44	2,738			2,738
Total																		
<b>Total supermarket sales</b>	145,374		468	145,842	3,989			3,989	7,253	1,796			1,796	327	152,953		468	153,421
<b>Total non supermarket sales</b>	59,329		2,250	61,579	4,366		451	4,817	8,758	1,407			1,407	256	67,523		3,070	70,593
<b>Total exports</b>	2,590			2,590	960			960	1,745						4,335			4,335
<b>Total sales</b>	207,293		2,718	210,011	9,315		451	9,766	17,756	3,203			3,203	582	224,812		3,538	228,350
<b>Total Stock on Hand</b>	59,711		182	59,893	3,296		302	3,598	6,542	725			725	132	65,836		731	66,567

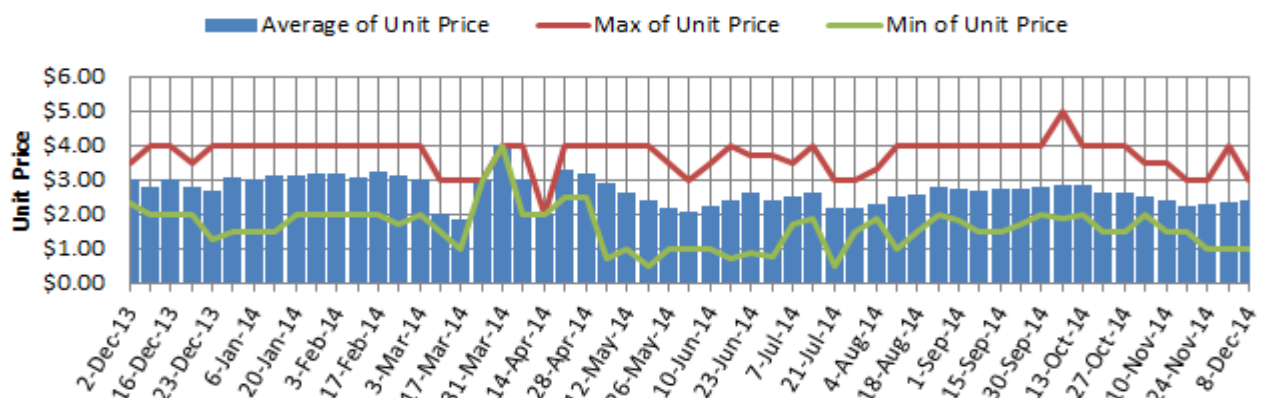
Weekly National Sales



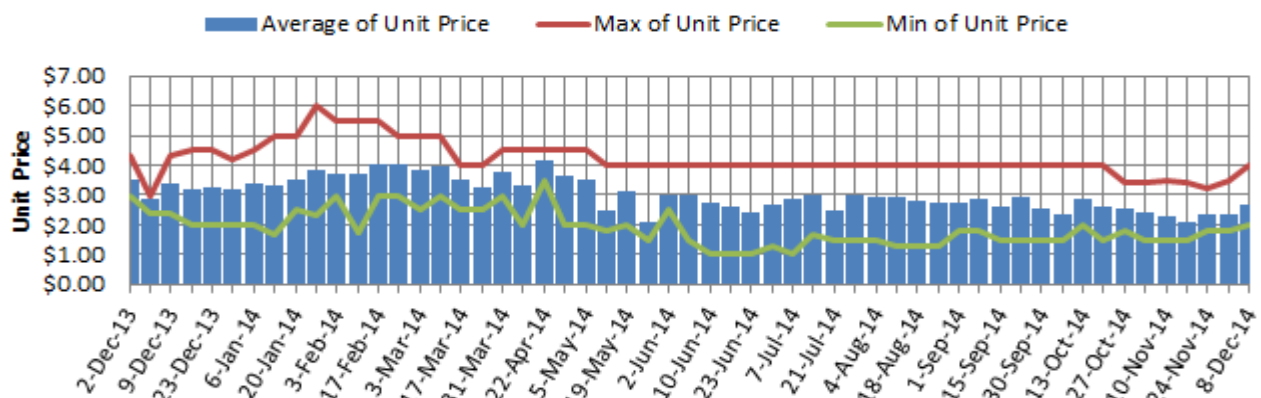
### Hass Avocado Average Retail Prices - Sydney



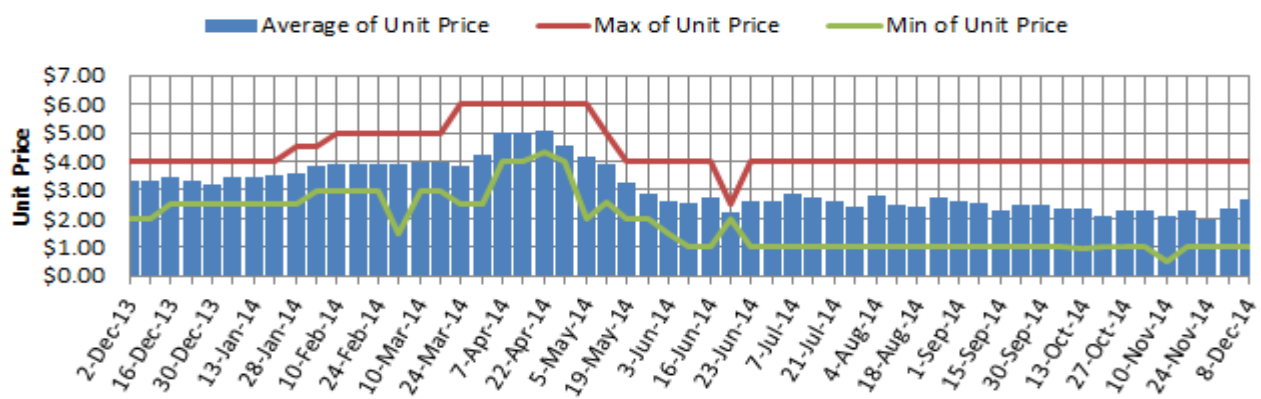
### Hass Avocado Average Retail Prices - Brisbane



### Hass Avocado Average Retail Prices - Melbourne

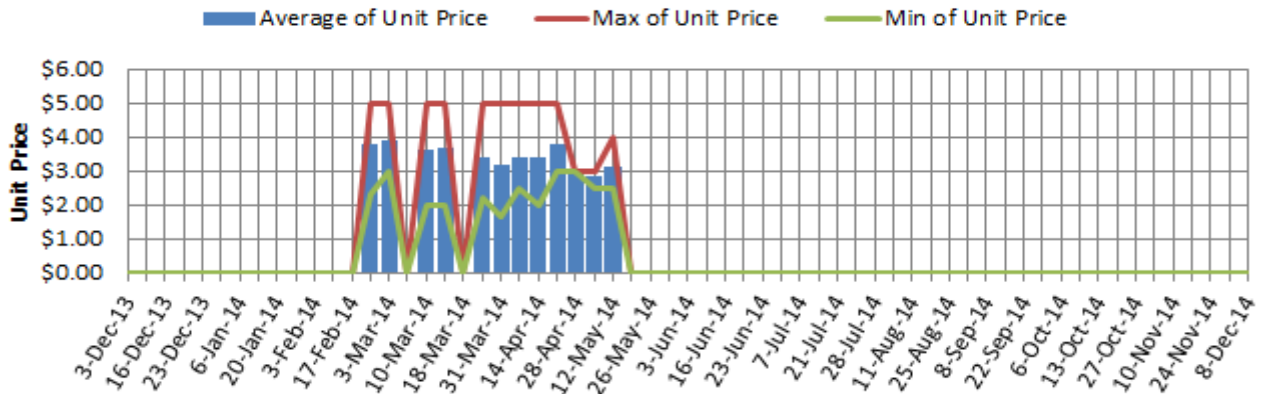


### Hass Avocado Average Retail Prices - Perth

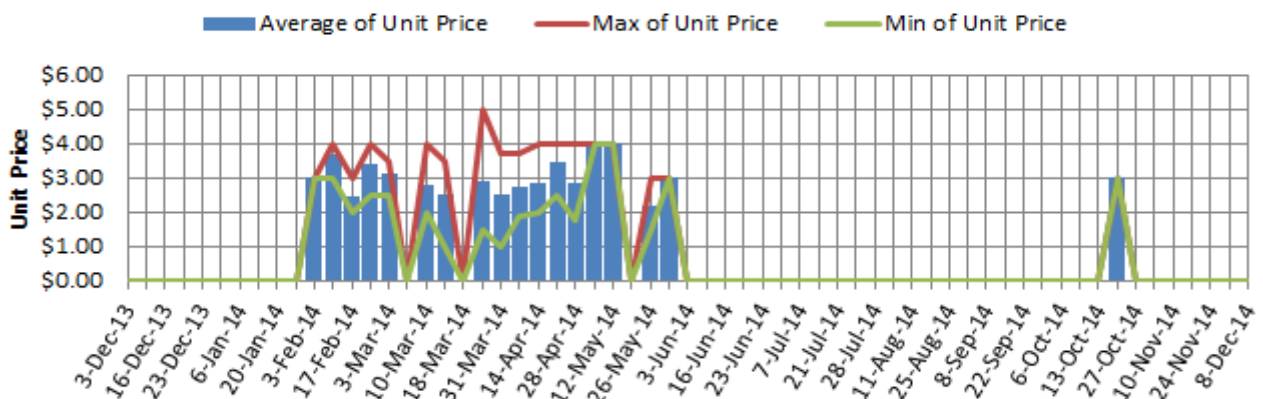


Assessment date (Week Commencing)

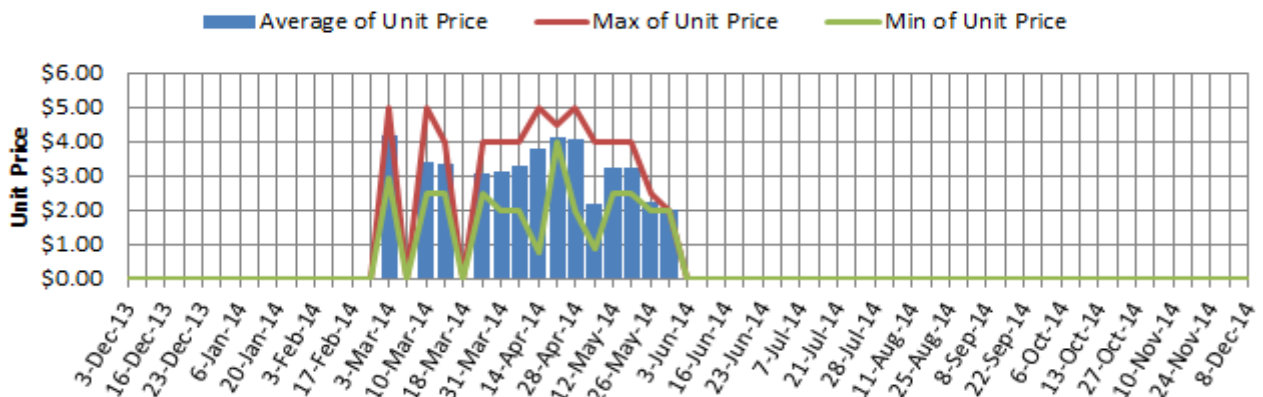
## Shepard Avocado Average Retail Prices - Sydney



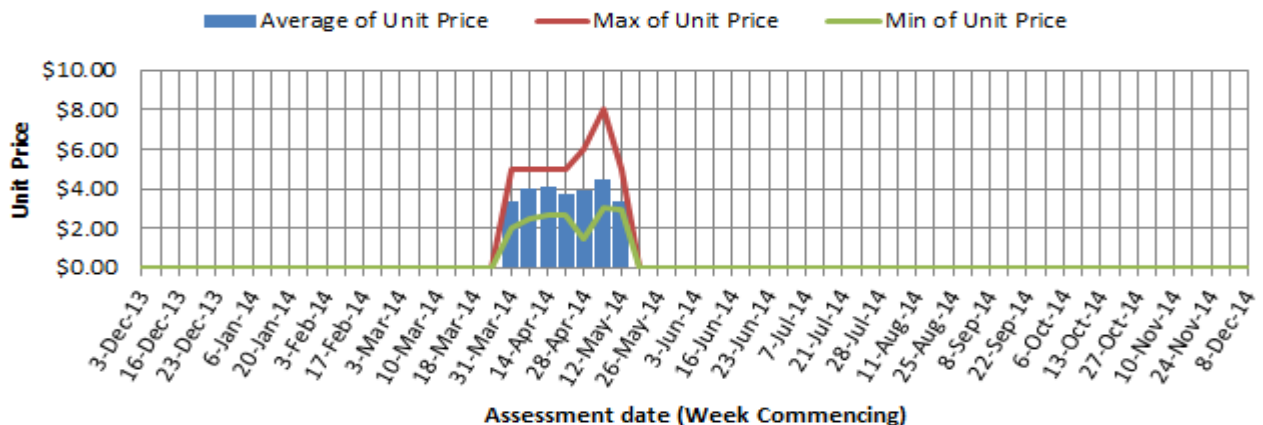
## Shepard Avocado Average Retail Prices - Brisbane



## Shepard Avocado Average Retail Prices - Melbourne



## Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

## Retail Prices by City, Store and Variety – 8th December 2014

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>SYDNEY</b>					
IGA	Hass	260	1.99	Store	NZ
I	Hass	260	2.49	No	Aus
I	Reed	420	2.50	No	Aus
Woolworths	Hass	300	2.68	No	Mixed
Woolworths	Hass	260	2.68	No	Aus
Woolworths	Hass	280	2.68	No	NZ
Foodworks	Hass	300	2.69	No	NZ
Coles	Hass	270	2.98	No	Aus
Coles	Hass	310	2.98	No	Aus
Coles	Hass	280	2.98	No	Mixed
I	Hass	250	2.99	No	Aus
I	Hass	260	2.99	No	Aus
I	Hass	330	2.99	No	Mixed
I	Reed	380	2.99	No	Aus
I	Reed	420	2.99	No	Aus
I	Hass	320	2.99	No	Aus
I	Hass	320	3.00	Store	NZ
IGA	Hass	280	3.49	No	NZ
I	Hass	300	3.99	No	Aus
<b>BRISBANE</b>					
I	Hass	190	0.99	Store	NZ
IGA	Hass	205	1.98	No	NZ
I	Hass	290	1.99	No	NZ
I	Hass	215	1.99	Store	NZ
I	Hass	260	2.00	Store	NZ
Coles	Hass	240	2.50	No	NZ
Coles	Hass	260	2.50	No	NZ
Coles	Hass	280	2.50	No	NZ
Woolworths	Hass	200	2.68	No	Aus
Woolworths	Hass	280	2.68	No	Aus
Woolworths	Hass	300	2.68	No	Aus
I	Hass	160	2.69	No	NZ
I	Hass	260	2.69	No	NZ
IGA	Hass	290	2.99	No	NZ
I	Hass	310	2.99	No	Aus
I	Hass	250	2.99	No	NZ

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
<b>MELBOURNE</b>					
I	Hass	260	1.99	No	NZ
I	Hass	190	1.99	No	NZ
I	Hass	180	2.40	No	Aus
Coles	Hass	250	2.50	Store	Aus
Coles	Hass	250	2.50	Store	Aus
Coles	Hass	200	2.50	Store	Aus
Woolworths	Hass	315	2.68	No	Aus
Woolworths	Hass	320	2.68	No	Aus
Woolworths	Hass	320	2.68	No	Aus
I	Hass	360	2.98	No	Aus
I	Hass	290	3.19	No	Aus
I	Hass	260	3.39	No	Aus
I	Hass	350	3.99	No	Aus
<b>PERTH</b>					
I	Hass	200	1.98	No	Aus
IGA	Hass	190	1.99	No	Aus
Coles	Hass	180	2.48	No	Aus
Coles	Hass	210	2.48	No	Aus
Coles	Hass	195	2.48	No	Aus
Woolworths	Hass	210	2.68	No	Aus
Woolworths	Hass	200	2.68	Store	Aus
Woolworths	Hass	200	2.68	Store	Aus
I	Hass	230	2.79	No	Aus
IS	Hass	265	2.99	No	Aus
IGA	Hass	260	2.99	No	Aus
IGA	Hass	255	2.99	No	Aus
I	Hass	220	2.99	No	Aus
I	Hass	260	2.99	No	Aus
IGA	Hass	305	3.69	No	Aus
I	Hass	270	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