



INFOCADO WEEKLY REPORT: 7th — 13th December 2013 (Wk 50)



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Comments

- The Avocados Australia office will be closed from 2pm 20 December 2013 and opening again on 6 January 2014. The Infocado reports will be published as usual during this time so please ensure your data is submitted on time so as not to hold up reporting.
- Retail prices in Sydney and Melbourne over the past 4 weeks have been fairly similar to prices over the same period last year however over the same period Brisbane average retail prices are up by nearly 50c per avocado this year and Perth prices by around 90c. This would seem to indicate that the impact of the lower volumes of Australian fruit over this period is being hardest felt in these 2 markets (especially Perth which is to be expected).
- Given the potential tapering off of avocado supply in the January period it is important that all growers and packhouses in the northern Australian growing regions are vigilant in not marketing fruit until it is mature and the industry standards are reached ie. 21% DM for Shepard and 23% DM for Hass.

What you need to be aware of for next month

The Australian Avocados Facebook page continues to grow in both fans and engagement. One of the biggest focus points for our media agency, IKON, is ensuring that any content we post on the Facebook page is well received and interesting to our fans. We want to make sure we're sharing content that not only makes avocados look delicious, but also makes our fans want to engage with it. This allows us to create a deeper influence with our fans, and help drive that avocado loving feeling.

The best way to make sure we're doing this is to calculate a 'reaction rate'. This calculates how many people are taking an action on the content (i.e. 'liking', sharing or commenting), and divides it by how many people have seen it. Australian Avocados reaction rates are through the roof! In the last week our average reaction rate was 8.3%. This is about 2-3% higher than similar brands in the industry. This shows that our audience aren't just viewers of our content, but are actively participating in our messaging on a regular basis.

If you haven't yet, remember to join us over at www.facebook.com/AustralianAvocados. And don't forget to like, comment and share!

Upcoming Holidays

Christmas Day: 25th December | Boxing Day: 26th December | New Year's Day: 1st January | Day after New Year's Day (NZ): 2nd January

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IMPORTANT and PLEASE NOTE:

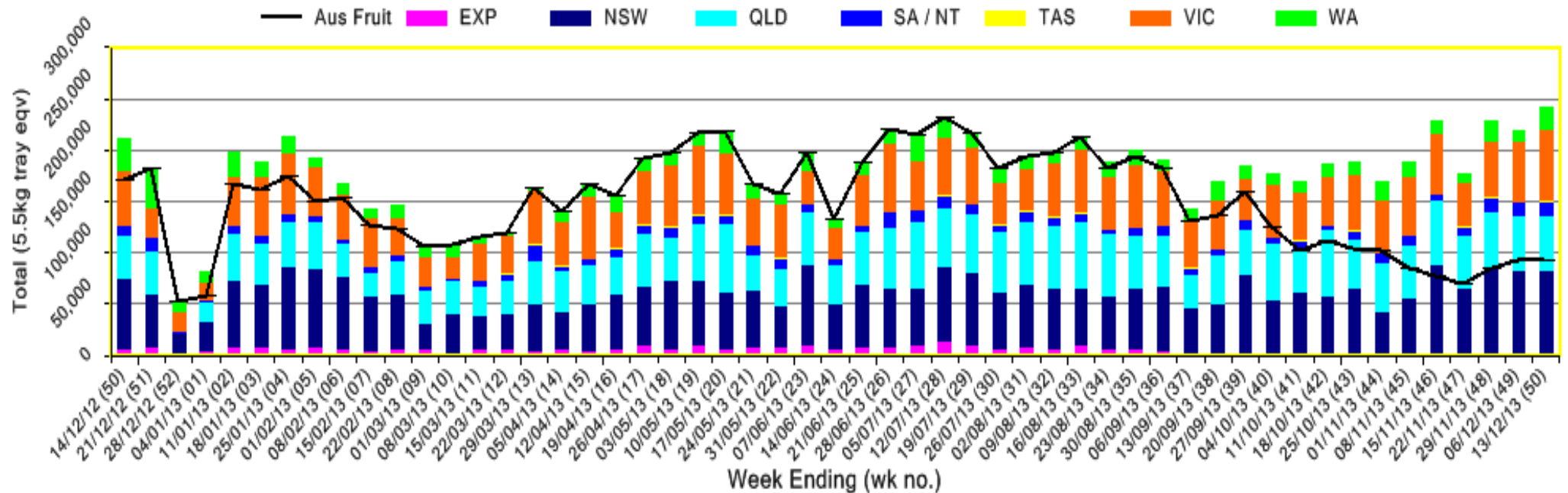
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 7th December - 13th December 2013 (Wk 50)

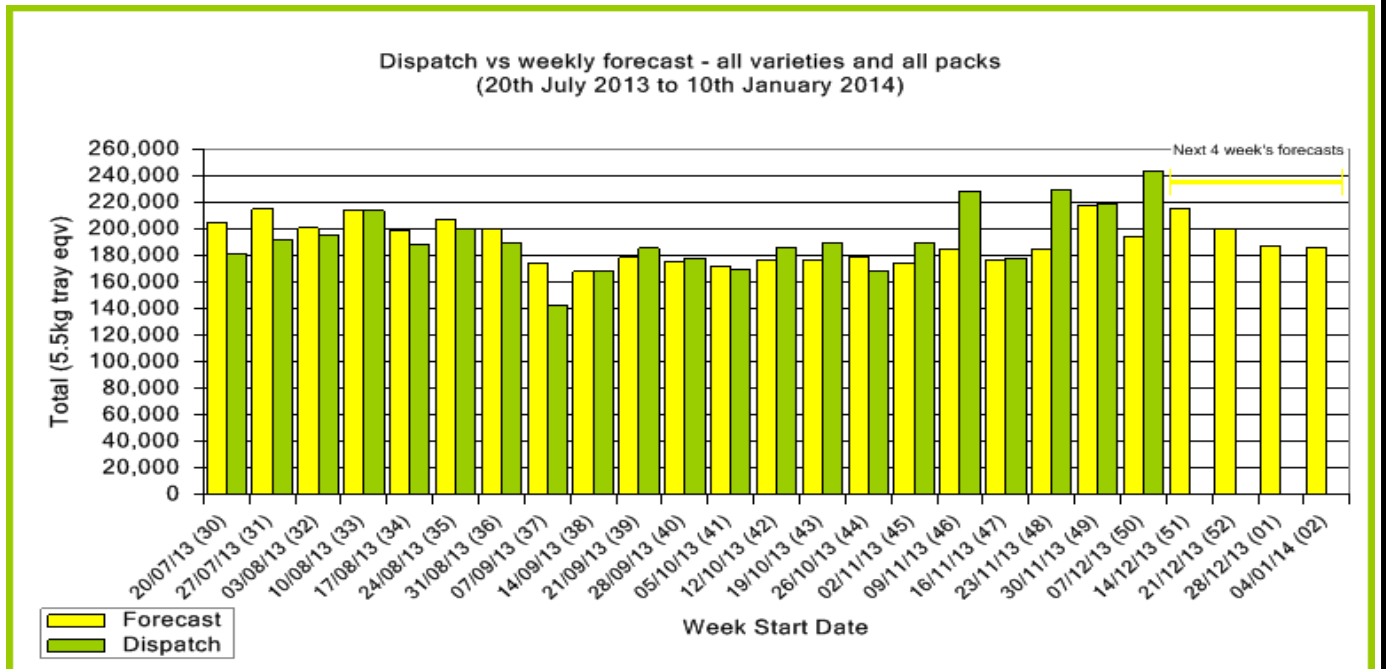
| Dest. State | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | 5.5kg | Trays - Total | Bulk | P/PK | Oil | Proc | 5.5Kg Eqv Trays All |
|--------------|--------------|---------------|---------------|---------------|-----------|---------------|---------------|---------------|---------------|----------------|--------------|--------------|-----------|------------|---------------------|
| | <16 | 16 | 18 | 20 | 22 | 23 | 25 | 28 | 28+ | 5.5Kg Eqv | 10Kg | Kg | Kg | Kg | Total |
| EXP | | | | | | | | 480 | 960 | 1,440 | 192 | | | | 1,789 |
| NSW | 902 | 4,378 | 6,807 | 12,995 | | 13,392 | 15,506 | 9,075 | 11,108 | 74,163 | 2,844 | 1,320 | | 253 | 79,620 |
| QLD | 205 | 2,324 | 4,337 | 8,717 | | 10,032 | 11,304 | 6,656 | 8,213 | 51,788 | 1,123 | | | 2 | 53,830 |
| SA / NT | | 250 | 3,874 | 1,805 | | 5,632 | 2,141 | 476 | 16 | 14,194 | 209 | | | | 14,574 |
| TAS | | | | | 89 | 406 | 733 | | | 1,228 | | | | | 1,228 |
| VIC | 2,326 | 2,659 | 11,697 | 15,479 | | 9,265 | 10,769 | 6,522 | 6,645 | 65,362 | 1,787 | | | 384 | 68,681 |
| WA | 96 | 932 | 1,504 | 7,721 | 10 | 5,677 | 3,990 | 1,062 | 598 | 21,590 | 973 | | 10 | 103 | 23,380 |
| Total | 3,529 | 10,543 | 28,219 | 46,717 | 99 | 44,404 | 44,443 | 24,271 | 27,540 | 229,765 | 7,128 | 1,320 | 10 | 742 | 243,102 |

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 8,983,122 5.5kg tray eqv



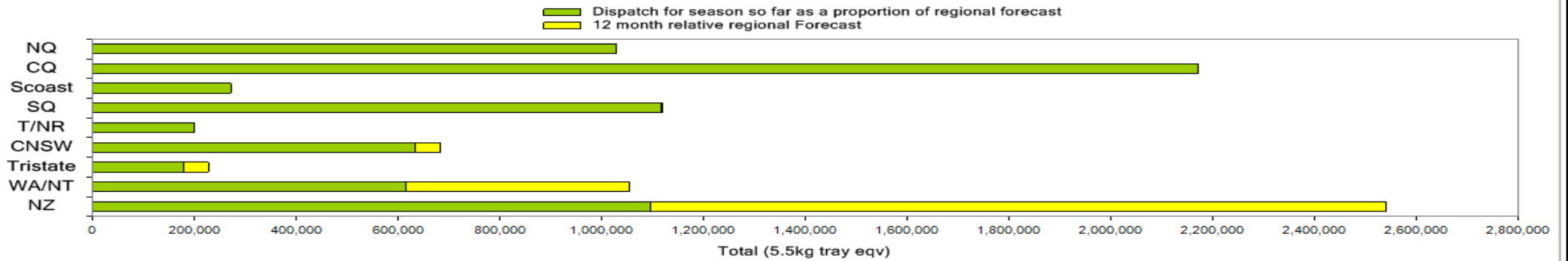
| Forecast Data (Week 50 - 2) | | | | |
|-----------------------------------|----------------|--------------|-----------|----------------|
| Variety | Trays - Total | Bulk | Oil | All - Total |
| | 5.5Kg Eqv | 10Kg | Kg | 5.5Kg Eqv |
| Week 50 - begin 07/12/2013 | | | | |
| Gwen | 600 | 40 | | 673 |
| Hass | 182,160 | 5,681 | 20 | 192,493 |
| Lamb Hass | 400 | | | 400 |
| Reed | 500 | 50 | | 591 |
| Week Total | 183,660 | 5,771 | 20 | 194,157 |
| Week 51 - begin 14/12/2013 | | | | |
| Gwen | 100 | | | 100 |
| Hass | 202,741 | 5,011 | 20 | 211,856 |
| Lamb Hass | 400 | | | 400 |
| Reed | 2,250 | 360 | | 2,905 |
| Week Total | 205,491 | 5,371 | 20 | 215,260 |
| Week 52 - begin 21/12/2013 | | | | |
| Hass | 189,792 | 4,238 | 20 | 197,501 |
| Reed | 1,650 | 510 | | 2,577 |
| Week Total | 191,442 | 4,748 | 20 | 200,079 |
| Week 1 - begin 28/12/2013 | | | | |
| Hass | 180,330 | 4,141 | 10 | 187,861 |
| Week Total | 180,330 | 4,141 | 10 | 187,861 |
| Week 2 - begin 04/01/2014 | | | | |
| Hass | 175,916 | 4,723 | 10 | 184,505 |
| Reed | 1,000 | 500 | | 1,909 |
| Week Total | 176,916 | 5,223 | 10 | 186,414 |

| Green shading indicates dispatch data | | | Yellow shading indicates forecast data | | | |
|---|----------------|--------------|--|-----------|------------|----------------|
| Dispatch Data (Week 50 - begin 7/12/2013) | | | | | | |
| Variety | Trays | Bulk | P/PK | Oil | Proc | 5.5Kg Eqv |
| | 5.5Kg Eqv | 10Kg | Kg | Kg | Kg | Total Trays |
| Gwen | 545 | 74 | | | | 680 |
| Hass | 219,307 | 5,711 | 1,320 | 10 | 742 | 230,068 |
| Lamb Hass | 2,828 | 77 | | | | 2,968 |
| Reed | 7,085 | 1,266 | | | | 9,387 |
| Total | 229,765 | 7,128 | 1,320 | 10 | 742 | 243,102 |

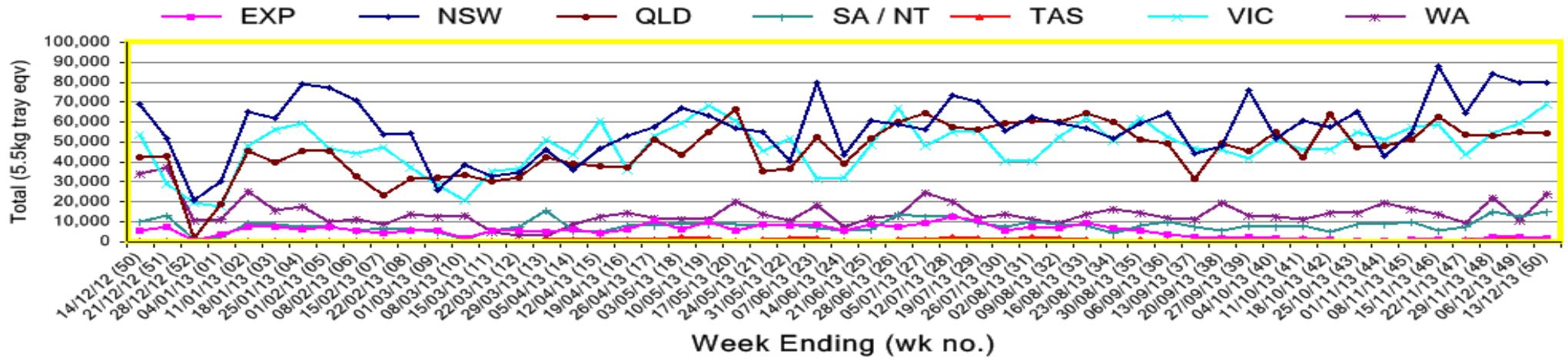


| New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) August 2013-April 2014 | | | | | | | | | | |
|---|---------------|---------------|----------------|----------------|----------------|---------|---------|--------|-----|------------------|
| Export Dest'n | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | Total to date |
| NZ Export to Australia Forecast | 0 | 145,700 | 338,000 | 424,000 | 564,865 | 642,687 | 435,405 | 38,984 | 0 | 2,588,932 |
| Australia | 16,341 | 83,173 | 283,934 | 582,190 | 278,085 | | | | | 1243,723 |
| USA | 0 | 0 | 0 | | | | | | | |
| Japan | 0 | 0 | 0 | | | | | | | |
| Total | 16,341 | 83,173 | 283,934 | 582,190 | 278,085 | | | | | 1243,723 |

Percentage dispatched by region (Based on seasonal forecast - 2013)



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 8,983,122 5.5kg tray eqv



Week 50 contributors - Packhouses

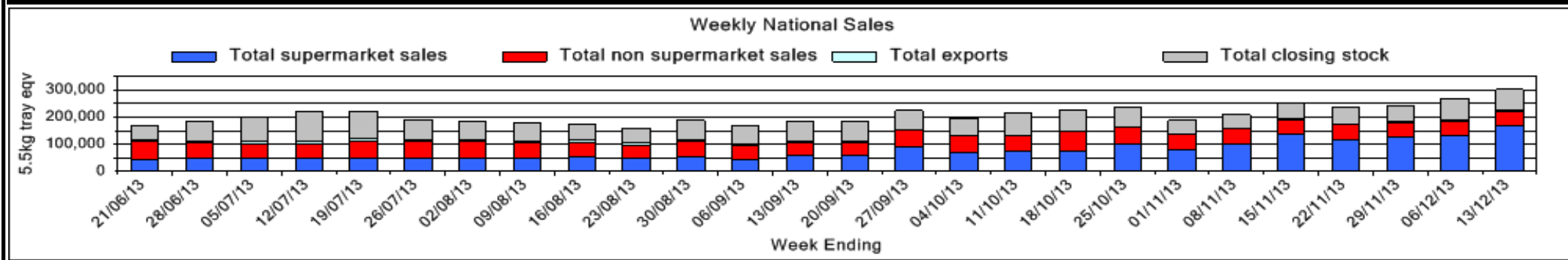
| | |
|--------------------------------------|---|
| Natures Fruit Company (Consolidator) | Chinoola Orchards (TRI) |
| The Avolution (Consolidator) | Golden Hill Packing Pty Ltd (TRI) |
| Coastal Avocados (CNSW) | Mariners Rest (WA) |
| I & A Tolson (CNSW) | Box Organics (WA) |
| Avocado Industry Council (NZAGA) | Advance Packing & Marketing Services P/L (WA) |
| Wodonga Park Fruit and Nuts (SQ) | VP & EA Farrell (WA) |
| Sunnyspot Packhouse Pty Ltd (SQ) | Delroy Orchards (WA) |
| KV & JM Lehmann (TRI) | Avonova (WA) |
| Chislett Developments Pty Ltd (TRI) | |

Week 50 contributors - Wholesalers

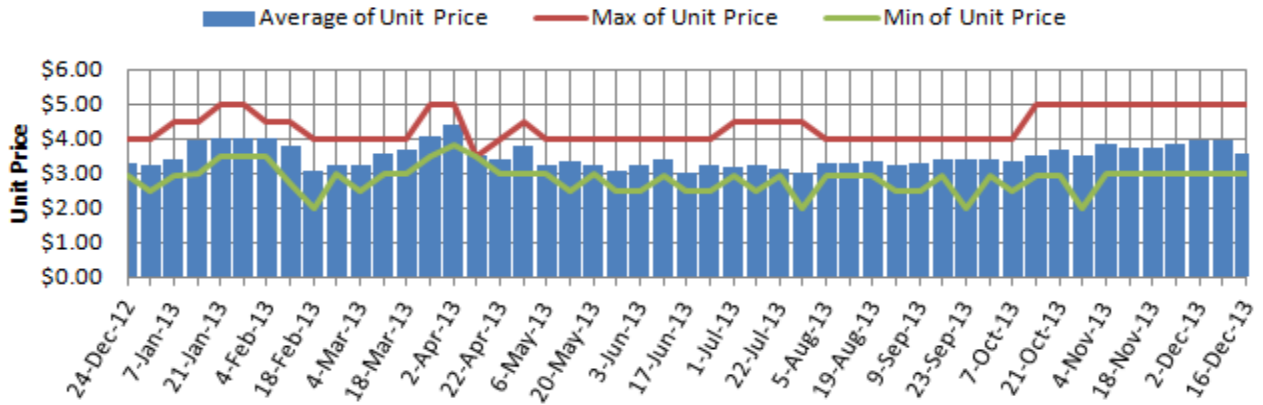
| | |
|---|---|
| C & S Ponte Produce Pty Ltd (Melbourne) | Fresh Choice WA Pty Ltd (Perth) |
| Costa Farms (Adelaide) | Murray Bros (Brisbane) |
| Costa Farms (Brisbane) | Sculli & Co Pty Ltd (Melbourne) |
| Costa Farms (Perth) | Sinclair & Antico (Aust) Pty Ltd (Sydney) |
| Dykes Bros (Melbourne) | 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) |

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

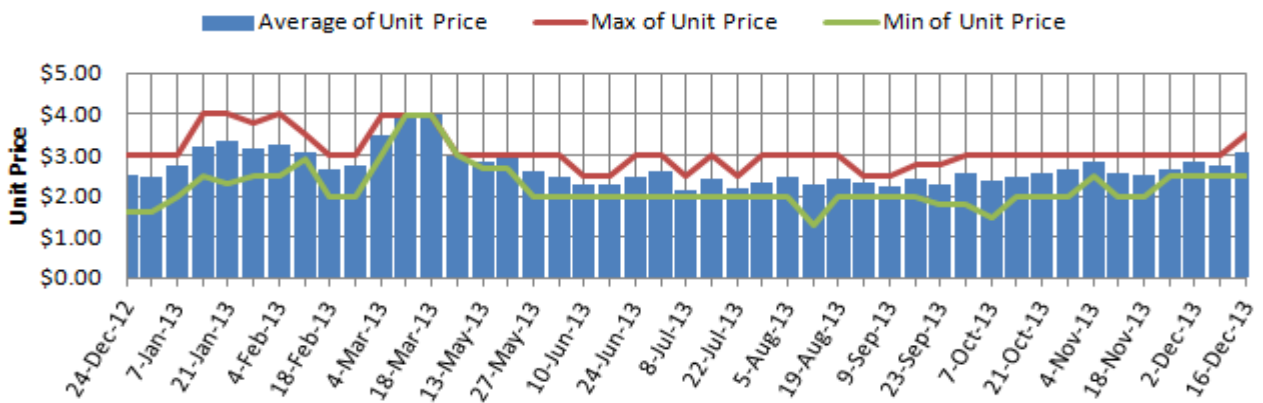
| | Trays 5.5kg eqv (incl. Mod6 & P84) | | | | Bulk 10Kg Cartons | | | | | Pre-Pack Kg | | | | | Total (5.5Kg Eqv) | | | |
|------------------------------------|---|---------|-------|---------|-------------------|---------|-------|-------|-----------|-------------|---------|-------|-------|-----------|-------------------|---------|-------|---------|
| | 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 | 54,493 | | 235 | 54,728 | 1,176 | | 9 | 1,185 | 2,155 | | | | | | 56,631 | | 251 | 56,882 |
| Total Stock on Hand | | | | | | | | | | | | | | | | | | |
| QLD | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 32,229 | | 518 | 32,747 | | | | | | | | | | | 32,229 | | 518 | 32,747 |
| Total non supermarket sales | 19,717 | | 24 | 19,741 | 568 | | | 568 | 1,033 | | | | | | 20,750 | | 24 | 20,774 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 51,946 | | 542 | 52,488 | 568 | | | 568 | 1,033 | | | | | | 52,979 | | 542 | 53,521 |
| Total Stock on Hand | 22,488 | | 174 | 22,662 | 187 | | | 187 | 340 | | | | | | 22,828 | | 174 | 23,002 |
| SA & TAS | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 18,176 | | 576 | 18,752 | 428 | | | 428 | 778 | | | | | | 18,954 | | 576 | 19,530 |
| Total non supermarket sales | 4,966 | | 79 | 5,045 | 695 | | 54 | 749 | 1,362 | | | | | | 6,230 | | 177 | 6,407 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 23,142 | | 655 | 23,797 | 1,123 | | 54 | 1,177 | 2,140 | | | | | | 25,184 | | 753 | 25,937 |
| Total Stock on Hand | 22,757 | | 280 | 23,037 | 664 | | 183 | 847 | 1,540 | | | | | | 23,964 | | 613 | 24,577 |
| VIC | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 46,639 | | 1,360 | 47,999 | 122 | | | 122 | 222 | | | | | | 46,861 | | 1,360 | 48,221 |
| Total non supermarket sales | 13,725 | | 2,000 | 15,725 | 1,151 | | 231 | 1,382 | 2,513 | | | | | | 15,818 | | 2,420 | 18,238 |
| Total exports | | | | | | | | | | | | | | | | | | |
| Total sales | 60,364 | | 3,360 | 63,724 | 1,273 | | 231 | 1,504 | 2,735 | | | | | | 62,679 | | 3,780 | 66,458 |
| Total Stock on Hand | 16,460 | 1 | 2,834 | 19,295 | 809 | | 192 | 1,001 | 1,820 | | | | | | 17,930 | 1 | 3,183 | 21,115 |
| WA | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 13,713 | | | 13,713 | 674 | | | 674 | 1,225 | | | | | | 14,938 | | | 14,938 |
| Total non supermarket sales | 4,114 | | | 4,114 | 441 | | | 441 | 802 | | | | | | 4,916 | | | 4,916 |
| Total exports | 1,440 | | | 1,440 | 192 | | | 192 | 349 | | | | | | 1,789 | | | 1,789 |
| Total sales | 19,267 | | | 19,267 | 1,307 | | | 1,307 | 2,376 | | | | | | 21,643 | | | 21,643 |
| Total Stock on Hand | 4,225 | | | 4,225 | 96 | | | 96 | 175 | | | | | | 4,400 | | | 4,400 |
| Total | | | | | | | | | | | | | | | | | | |
| Total supermarket sales | 162,462 | | 2,454 | 164,916 | 1,224 | | | 1,224 | 2,225 | | | | | | 164,687 | | 2,454 | 167,141 |
| Total non supermarket sales | 45,310 | | 2,338 | 47,648 | 4,031 | | 294 | 4,325 | 7,864 | | | | | | 52,639 | | 2,872 | 55,511 |
| Total exports | 1,440 | | | 1,440 | 192 | | | 192 | 349 | | | | | | 1,789 | | | 1,789 |
| Total sales | 209,212 | | 4,792 | 214,004 | 5,447 | | 294 | 5,741 | 10,438 | | | | | | 219,116 | | 5,326 | 224,442 |
| Total Stock on Hand | 67,370 | 1 | 3,867 | 71,237 | 2,524 | | 375 | 2,899 | 5,271 | | | | | | 71,959 | 1 | 4,548 | 76,508 |



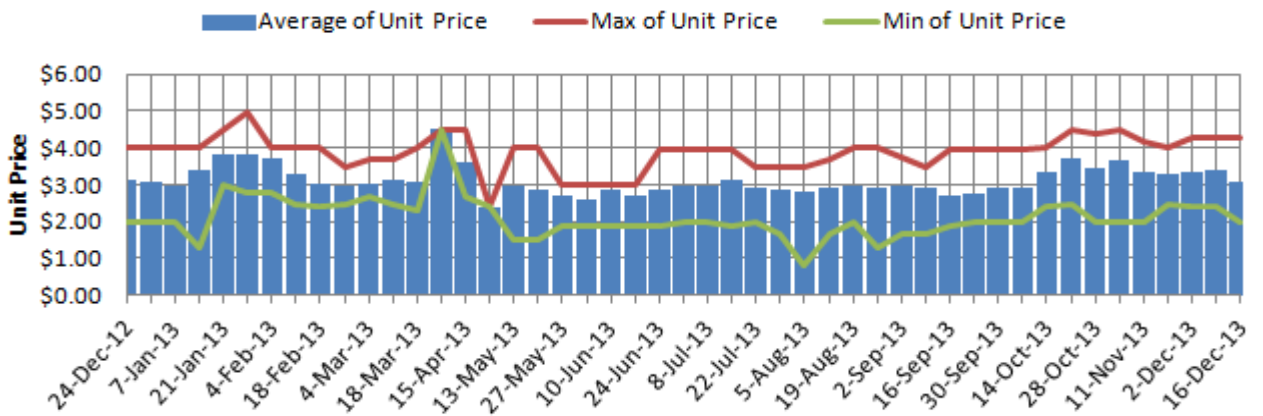
Hass Avocado Average Retail Prices - Sydney



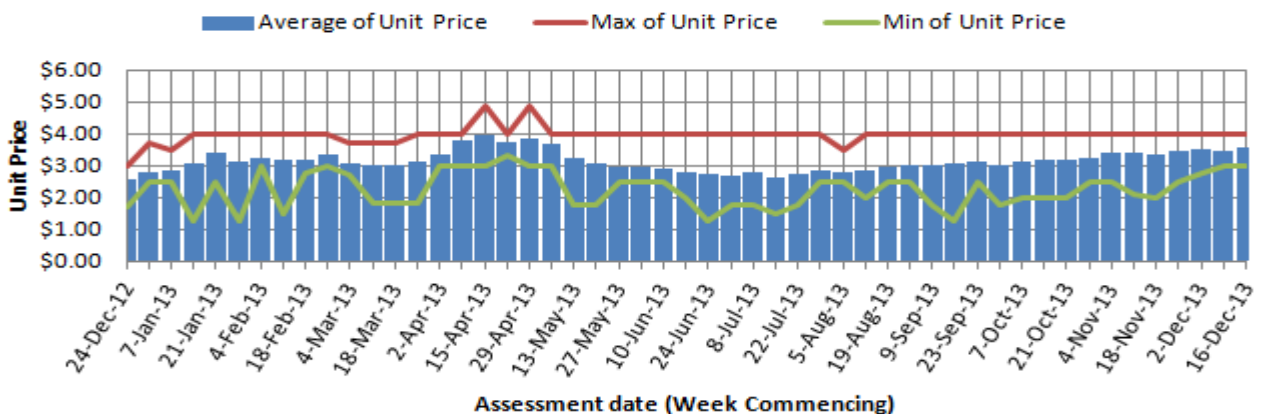
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

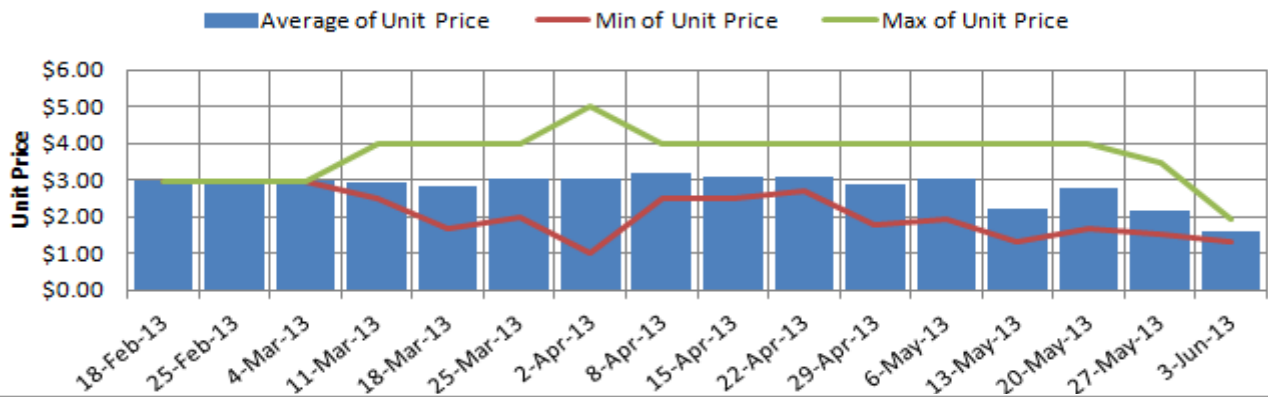


Hass Avocado Average Retail Prices - Perth

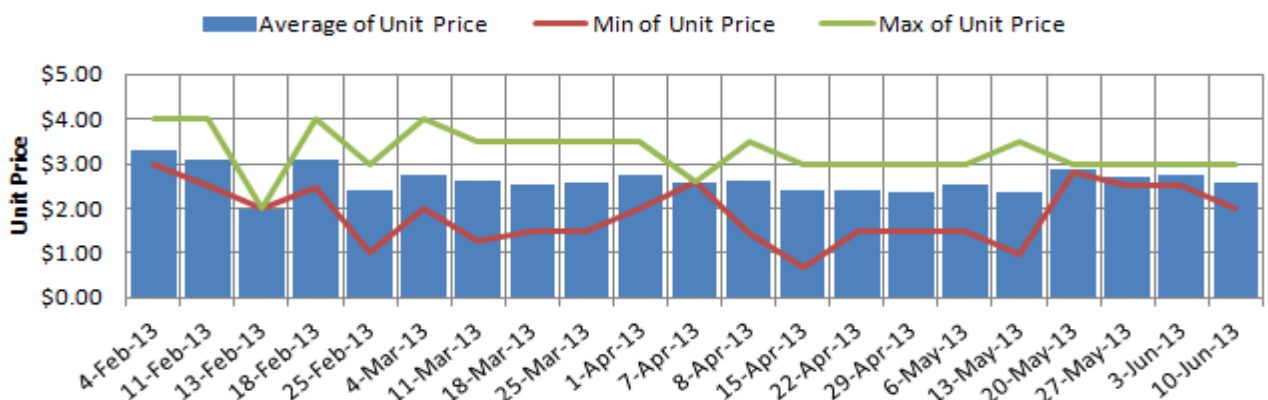


Assessment date (Week Commencing)

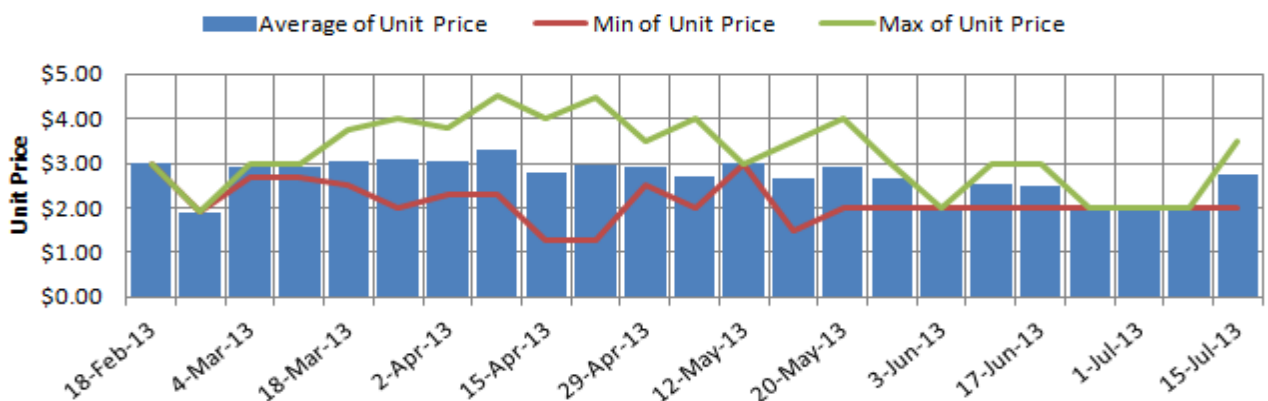
Shepard Avocado Average Retail Prices - Sydney



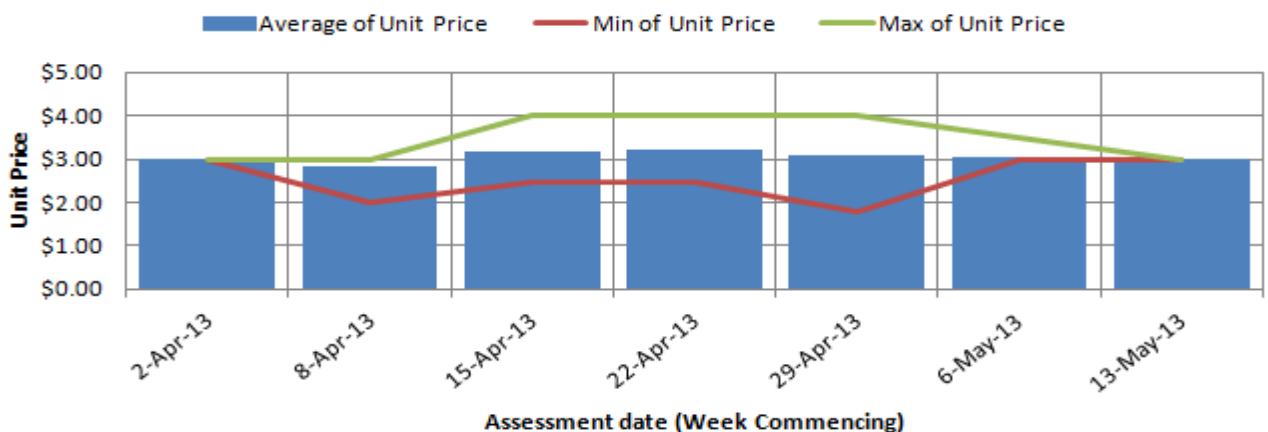
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Retail Prices by City, Store and Variety – 16th December 2013

| Store | Var | Av Wt (g) | Unit Price | Special | Country of Origin |
|-----------------|------|-----------|------------|---------|-------------------|
| SYDNEY | | | | | |
| I | Hass | 160 | 1.33 | Store | NZ |
| Coles | Hass | 270 | 2.98 | No | NZ |
| Woolworths | Hass | 260 | 2.98 | No | NZ |
| Coles | Hass | 240 | 2.98 | No | NZ |
| Coles | Hass | 240 | 2.98 | No | NZ |
| Woolworths | Hass | 290 | 2.98 | No | NZ |
| Woolworths | Hass | 270 | 2.98 | No | NZ |
| I | Reed | 420 | 2.99 | No | Aus |
| I | Reed | 410 | 2.99 | No | Aus |
| I | Reed | 400 | 2.99 | No | Aus |
| I | Hass | 260 | 3.49 | No | Aus |
| I | Hass | 260 | 3.49 | No | Aus |
| IGA | Hass | 260 | 3.50 | No | Aus |
| I | Hass | 330 | 3.99 | No | Aus |
| I | Reed | 440 | 3.99 | No | Aus |
| I | Hass | 330 | 3.99 | No | Aus |
| IGA | Hass | 260 | 3.99 | No | Mixed |
| Foodworks | Hass | 290 | 3.99 | No | Aus |
| I | Reed | 370 | 3.99 | No | Aus |
| I | Hass | 280 | 3.99 | No | Aus |
| I | Reed | 320 | 4.99 | No | Aus |
| I | Hass | 300 | 4.99 | No | Aus |
| I | Reed | 440 | 4.99 | No | Aus |
| BRISBANE | | | | | |
| I | Reed | 425 | 2.00 | Store | Aus |
| I | Hass | 160 | 2.00 | Store | NZ |
| I | Hass | 215 | 2.00 | Store | NZ |
| I | Reed | 425 | 2.29 | Store | Aus |
| I | Hass | 215 | 2.35 | Store | NZ |
| IGA | Hass | 190 | 2.48 | No | NZ |
| I | Hass | 160 | 2.50 | Store | NZ |
| Coles | Hass | 215 | 2.98 | Store | NZ |
| Coles | Hass | 200 | 2.98 | No | NZ |
| Coles | Hass | 220 | 2.98 | No | NZ |
| I | Hass | 300 | 2.99 | No | NZ |
| I | Hass | 200 | 2.99 | No | NZ |
| I | Reed | 470 | 3.00 | Store | NZ |
| Woolworths | Hass | 220 | 3.48 | No | NZ |
| Woolworths | Hass | 255 | 3.48 | No | NZ |
| I | Reed | 470 | 3.50 | Store | NZ |
| I | Hass | 340 | 3.50 | Store | Aus |
| I | Hass | 226 | 3.50 | Store | Aus |
| I | Hass | 340 | 3.99 | Store | Aus |

| Store | Var | Av Wt (g) | Unit Price | Special | Country of Origin |
|------------------|------|-----------|------------|---------|-------------------|
| MELBOURNE | | | | | |
| I | Hass | 145 | 1.99 | No | NS |
| I | Hass | 150 | 1.99 | No | NS |
| I | Hass | 250 | 2.29 | No | NS |
| I | Hass | 150 | 2.40 | No | NS |
| Safeway | Hass | 265 | 2.98 | No | NZ |
| Safeway | Hass | 250 | 2.98 | No | NS |
| Safeway | Hass | 255 | 2.98 | No | NZ |
| IS | Hass | 250 | 2.99 | No | Aus |
| IGA | Hass | 255 | 2.99 | No | NS |
| I | Hass | 190 | 2.99 | No | NS |
| I | Hass | 350 | 3.48 | No | Aus |
| Coles | Hass | 270 | 3.48 | No | Aus |
| Coles | Hass | 280 | 3.48 | No | Aus |
| Coles | Hass | 280 | 3.48 | No | Aus |
| I | Hass | 240 | 3.49 | No | NZ |
| I | Hass | 305 | 4.29 | No | Aus |
| I | Hass | 300 | 4.29 | No | Aus |
| I | Hass | 305 | 4.50 | Store | NS |
| PERTH | | | | | |
| IS | Hass | 220 | 2.49 | Store | NZ |
| I | Hass | 230 | 2.99 | No | Aus |
| I | Hass | 225 | 2.99 | No | Aus |
| I | Hass | 265 | 2.99 | No | Aus |
| Woolworths | Hass | 200 | 3.48 | No | Aus |
| Coles | Hass | 170 | 3.48 | No | Aus |
| Woolworths | Hass | 230 | 3.48 | Store | Aus |
| Woolworths | Hass | 215 | 3.48 | No | Aus |
| IGA | Hass | 270 | 3.49 | No | NZ |
| IGA | Hass | 260 | 3.69 | No | NZ |
| IGA | Hass | 285 | 3.99 | No | NZ |
| IGA | Hass | 255 | 3.99 | No | Mixed |
| I | Hass | 265 | 3.99 | No | NZ |
| 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

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