



INFOCADO WEEKLY REPORT: 31st January — 6th February 2015 (Week 6)



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Comments

- Sydney markets have received the majority share of dispatches from packhouses for the week gone, size 20 dominating (refer P 2).
- The weekly dispatch volume edged slightly higher than the weekly forecast volume. The four weekly forecast estimates industry supply will fluctuate as WA and NZ near the end of their season with NQ looking to begin (refer P 3).
- The four weekly forecast illustrates an improved picture in comparison to the reduction of supply it displayed last week. AAL would like to thank all contributing packhouses for their diligence that are nearing the beginning of their season (refer P 3).
- NQ packers are reminded to carefully monitor fruit maturity as the harvest season approaches, to ensure consumer satisfaction which drives future purchases.
- Weekly national sales continue to remain in line with volumes since the new year (refer P 5).
- Average retail price per Hass avocado continues to hold steady. Prices monitored indicate the range hovering approx. \$3.00 to \$3.50 per Hass avocado. Shepard continue to flow into Brisbane retail outlets (refer P 6 - 8).

Update of Fruit Tracker Study

MT14014 Fruit Tracking Study is a longitudinal quantitative research study that provides an ongoing measure into the effectiveness of marketing and advertising investment over time. The main aim of this market research study is to record changes to consumer attitudes and behavior over time across a number of fruit categories and specifically avocados.

The research is carried out using six waves per year collecting information using an online survey. A random but representative audience of Australian consumers aged 18+ years completes this survey each wave. These waves are then reported in three combined survey reports in July, November and March.

The latest report provides some very positives results for avocados. Some of these highlights include;

- The number of consumers claiming to buy avocados regularly has increased.
- Purchase intent is at its highest (67%).
- Satisfaction with the appearance, ripeness and quality of avocados have all seen an increase this wave.

For a full brief please refer to the Guacamole Enewsletter - 29/01/2015

Upcoming Holidays

Labour Day (WA): 2nd March | Labour Day (VIC) & March Public Holiday (SA): 9th March | Good Friday : 3rd April | Easter Monday: 6th April

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:

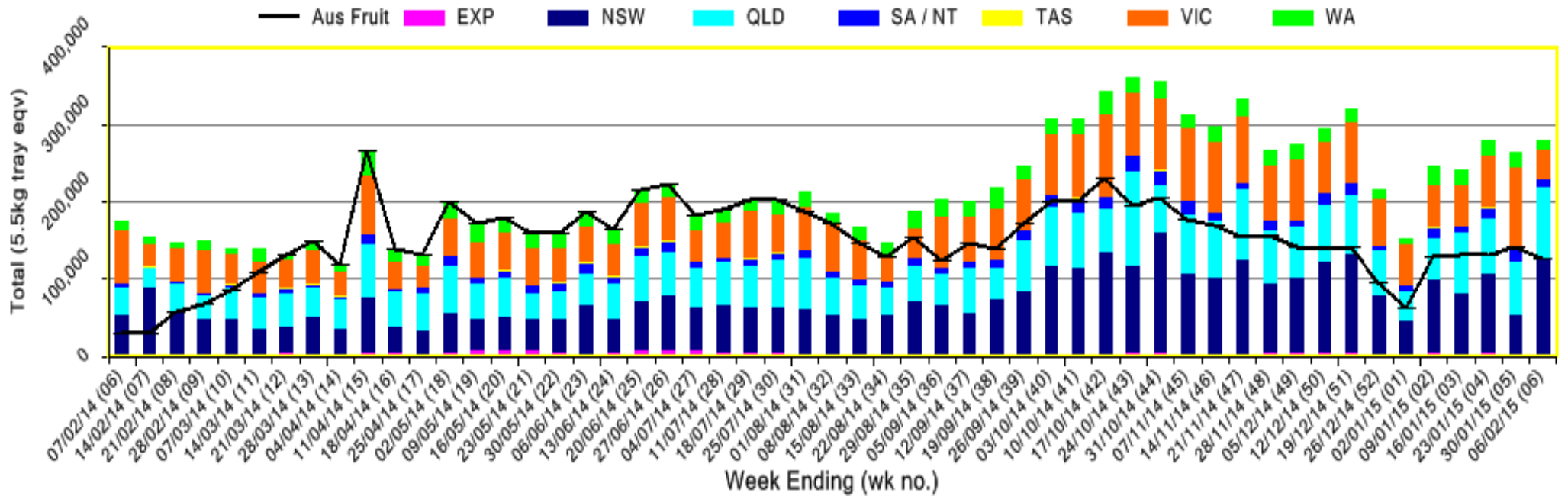
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 31st January - 6th February 2015 (Wk 6)

Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Oil	5.5Kg Eqv Trays All
	<16	16	18	20	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Total
NSW	474	6,986	13,348	24,454	22,158	26,470	13,747	13,945	121,582	2,551			126,220
QLD	160	10,410	13,828	19,406	16,340	16,325	10,233	6,010	92,712	384			93,410
SA / NT	827	977	184	1,639	1,028	1,707	2,947		9,309	174			9,625
TAS					210	20	20		250				250
VIC	720	3,164	5,021	13,586	5,836	3,965	1,349	438	34,079	1,514			36,832
WA	160	524	531	849	2,851	2,899	4,579	153	12,546	1,055	156	140	14,517
Total	2,341	22,061	32,912	59,934	48,423	51,386	32,875	20,546	270,478	5,678	156	140	280,855

Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 1,467,652 5.5kg tray eqv



Yellow shading indicates forecast data

Green shading indicates dispatch data

Forecast Data (Week 6 - 10)

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

Week 6 - begin 31/01/2015						
Hass	250,050	5,356	2,000	150		260,179
Lamb Hass	4,000	80				4,145
Reed	3,500	200			2,000	4,228
Week Total	257,550	5,636	2,000	150	2,000	268,552

Week 7 - begin 07/02/2015						
Hass	196,717	5,115	1,000	150		206,226
Reed	2,500					2,500
Shepard	2,500					2,500
Week Total	201,717	5,115	1,000	150		211,226

Week 8 - begin 14/02/2015						
Hass	239,582	5,555	1,000	70		249,877
Reed	2,500					2,500
Shepard	9,100	600				10,191
Week Total	251,182	6,155	1,000	70		262,568

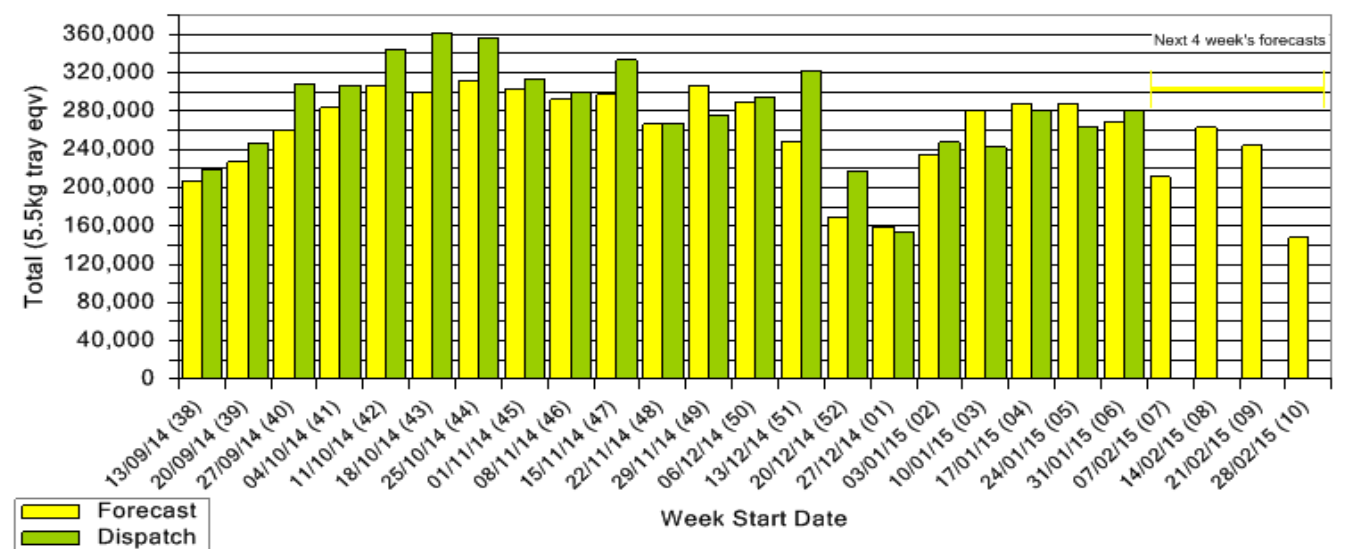
Week 9 - begin 21/02/2015						
Hass	198,501	4,600	1,000			207,047
Reed	2,500					2,500
Shepard	20,100	7,800				34,282
Week Total	221,101	12,400	1,000			243,828

Week 10 - begin 28/02/2015						
Hass	92,600	4,000	1,000			100,055
Shepard	32,600	8,300				47,691
Week Total	125,200	12,300	1,000			147,746

Dispatch Data (Week 6 - begin 31/01/2015)

Variety	Trays	Bulk	P/PK	Oil	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Hass	266,937	5,311	156	140	276,646
Lamb Hass	3,126	246			3,573
Reed	415	121			635
Total	270,478	5,678	156	140	280,855

Dispatch vs weekly forecast - all varieties and all packs (13th September 2014 to 6th March 2015)

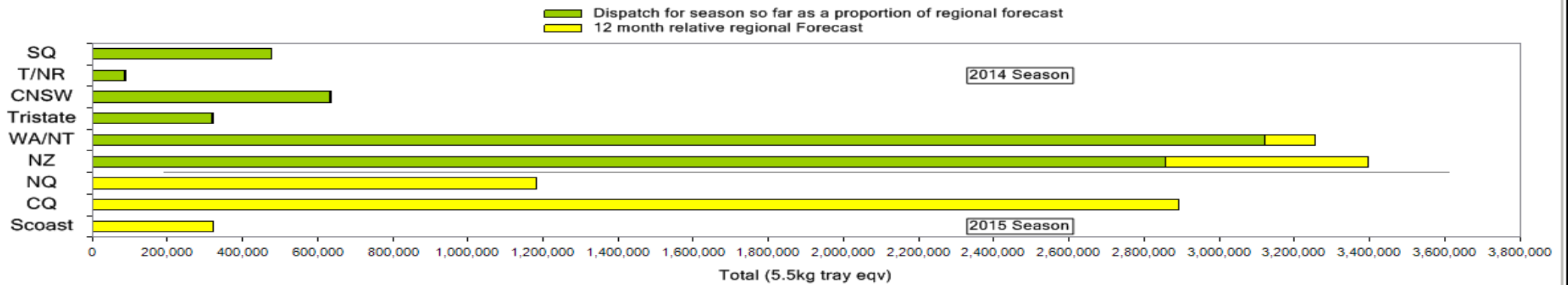


New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) August 2014-April 2015

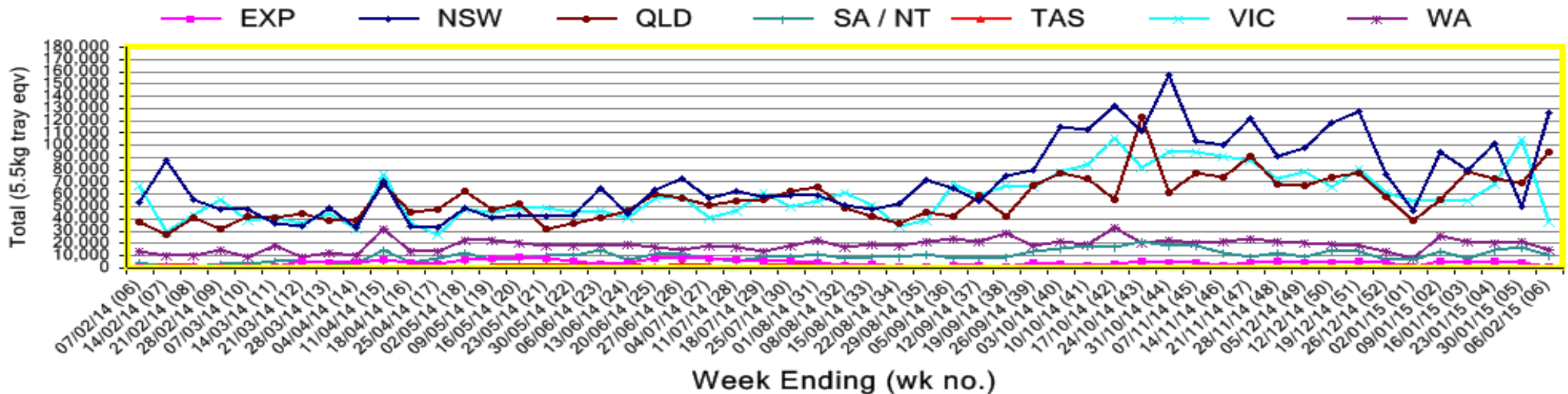
Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to Date
NZ Export to Australia Forecast	56,168	301,684	443,740	379,760	393,210	557,554	624,024	50,280	0	2,806,420
Australia (from Infocado)	123,747	293,918	653,001	561,186	596,008	597,827	155,020			2,980,707
USA¹	6	12,687	103,015	245,195	150,504	0				511,408
Japan¹	1,916	12,999	41,077	63,301	31,631	46,920				197,843
Other Asia¹	7,609	43,179	85,640	71,813	77,550	59,243				345,034
Total	133,278	362,783	882,733	941,495	855,693	703,990	155,020			4,034,992

¹ Source: Infoshare NZ, statistics adjusted for freight time from NZ to destination port.

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



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2015 to date = 1,467,652 5.5kg tray eqv



Week 6 Contributors - Packhouses

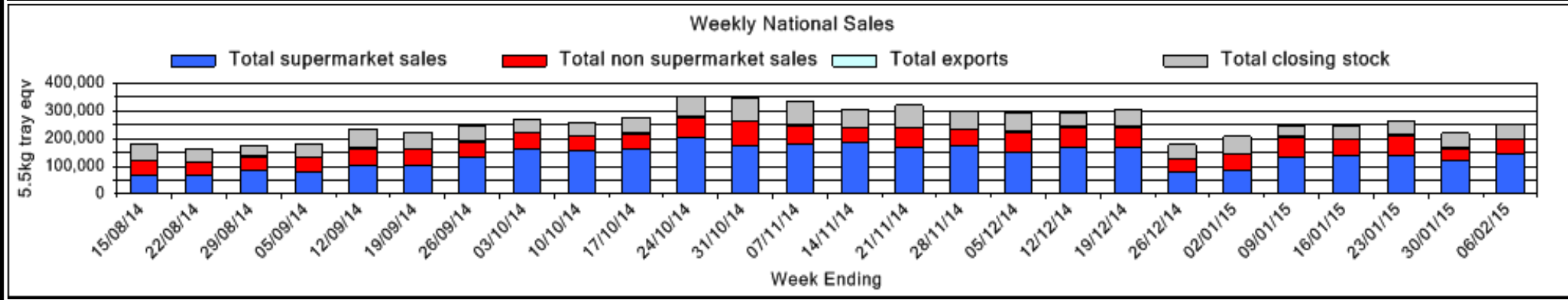
- | | |
|--|---|
| Natures Fruit Company (Consolidator) | Avocado Estates (NQ) |
| One Harvest (Consolidator) | Willow Creek (WA) |
| Simpson Farms Pty Ltd (Consolidator) | West Aussie Avos (WA) |
| Sunfresh (Consolidator) | Box Organics (WA) |
| The Evolution (Consolidator) | Mariners Rest (WA) |
| Avocado Industry Council (NZAGA) | Delroy Orchards (WA) |
| R & M Waterman (NQ) | Advance Packing & Marketing Services P/L (WA) |
| Aussie Orchards Growers & Packers (NQ) | CNSW: Less than 3 contributors |
| Gunnado Farm (NQ) | TRI: Less than 3 contributors |

Week 6 Contributors - Wholesalers

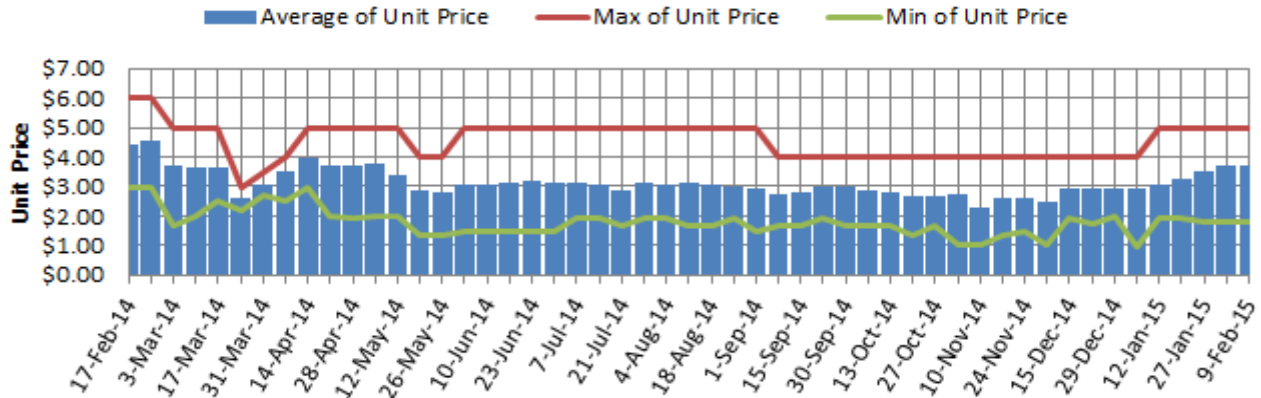
- | | |
|---|---|
| Allcrops Pty Ltd (Sydney) | Murray Bros (Brisbane) |
| C & S Ponte Produce Pty Ltd (Melbourne) | Sculli & Co Pty Ltd (Melbourne) |
| Costa Farms (Adelaide) | Sinclair & Antico (Aust) Pty Ltd (Sydney) |
| Costa Farms (Brisbane) | The La Manna Group (Adelaide) |
| Costa Farms (Melbourne) | The La Manna Group (Brisbane) |
| Dykes Bros (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

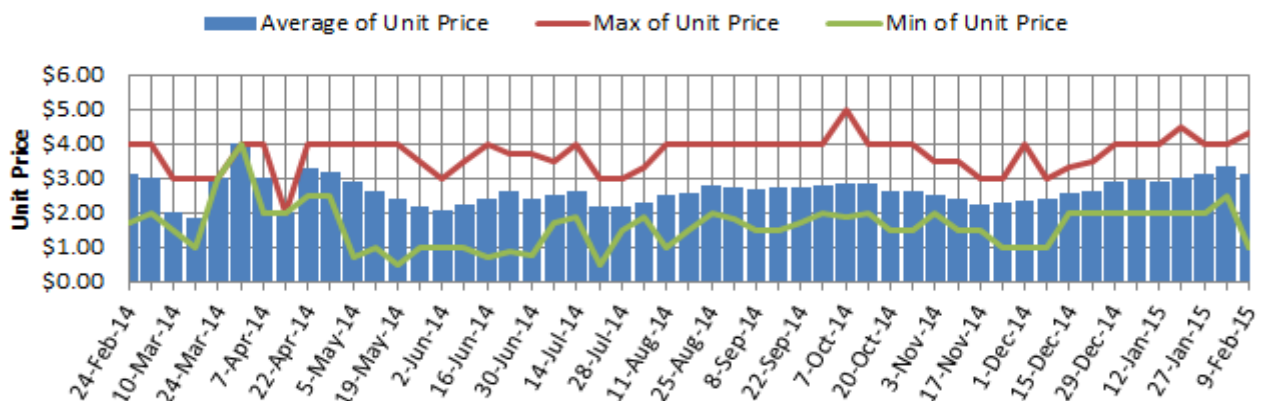
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	54,022		1,119	55,141	675			675	1,227						55,249		1,119	56,368
Total non supermarket sales	6,032		713	6,745	343		39	382	695						6,656		784	7,440
Total exports																		
Total sales	60,054		1,832	61,886	1,018		39	1,057	1,922						61,905		1,903	63,808
Total Stock on Hand	3,300		67	3,367											3,300		67	3,367
QLD																		
Total supermarket sales	38,954			38,954	384			384	698						39,652			39,652
Total non supermarket sales	3,561		168	3,729	596			596	1,084						4,645		168	4,813
Total exports																		
Total sales	42,515		168	42,683	980			980	1,782						44,297		168	44,465
Total Stock on Hand	15,416			15,416	119			119	216						15,632			15,632
SA & TAS																		
Total supermarket sales	12,564			12,564	97			97	176						12,740			12,740
Total non supermarket sales	14,999		742	15,741	375		259	634	1,153						15,681		1,213	16,894
Total exports																		
Total sales	27,563		742	28,305	472		259	731	1,329						28,421		1,213	29,634
Total Stock on Hand	7,940		134	8,074	926		35	961	1,747						9,624		198	9,821
VIC																		
Total supermarket sales	26,899			26,899	768			768	1,396						28,295			28,295
Total non supermarket sales	16,431	40	1,188	17,659	883		191	1,074	1,953						18,037	40	1,535	19,612
Total exports																		
Total sales	43,330	40	1,188	44,558	1,651		191	1,842	3,349						46,332	40	1,535	47,907
Total Stock on Hand	16,755		1,992	18,747	569		32	601	1,093						17,790		2,050	19,840
WA																		
Total supermarket sales	9,215			9,215	100			100	182						9,397			9,397
Total non supermarket sales	3,141			3,141	489			489	889						4,030			4,030
Total exports																		
Total sales	12,356			12,356	589			589	1,071						13,427			13,427
Total Stock on Hand	4,834		320	5,154	134			134	244						5,078		320	5,398
Total																		
Total supermarket sales	141,654		1,119	142,773	2,024			2,024	3,680						145,334		1,119	146,453
Total non supermarket sales	44,164	40	2,811	47,015	2,686		489	3,175	5,773						49,048	40	3,700	52,788
Total exports																		
Total sales	185,818	40	3,930	189,788	4,710		489	5,199	9,453						194,382	40	4,819	199,241
Total Stock on Hand	48,245		2,513	50,758	1,748		67	1,815	3,300						51,423		2,635	54,058



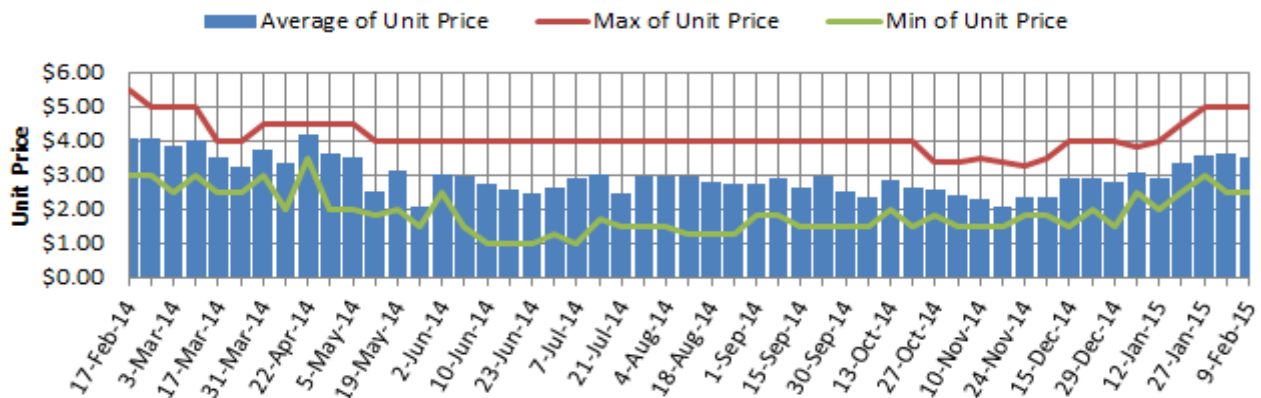
Hass Avocado Average Retail Prices - Sydney



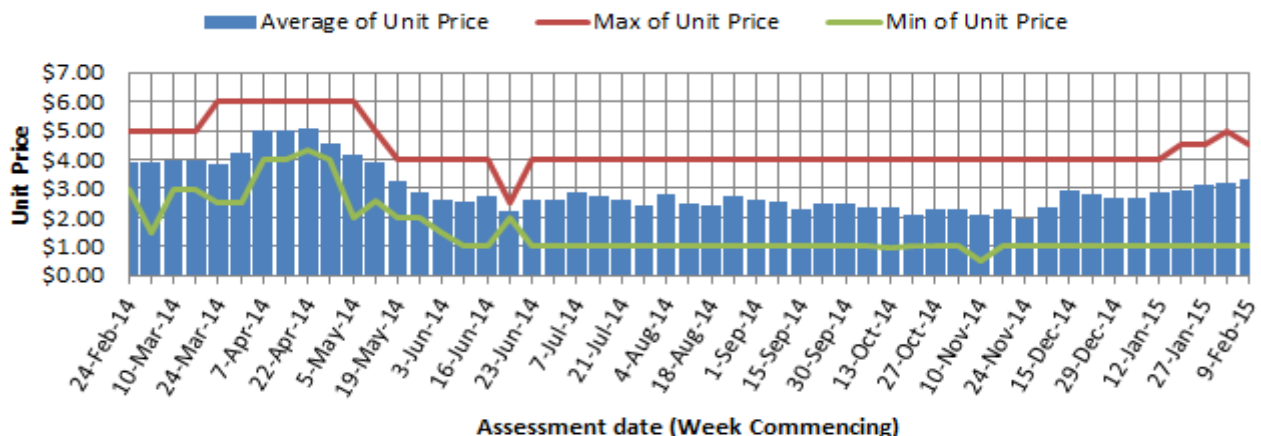
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

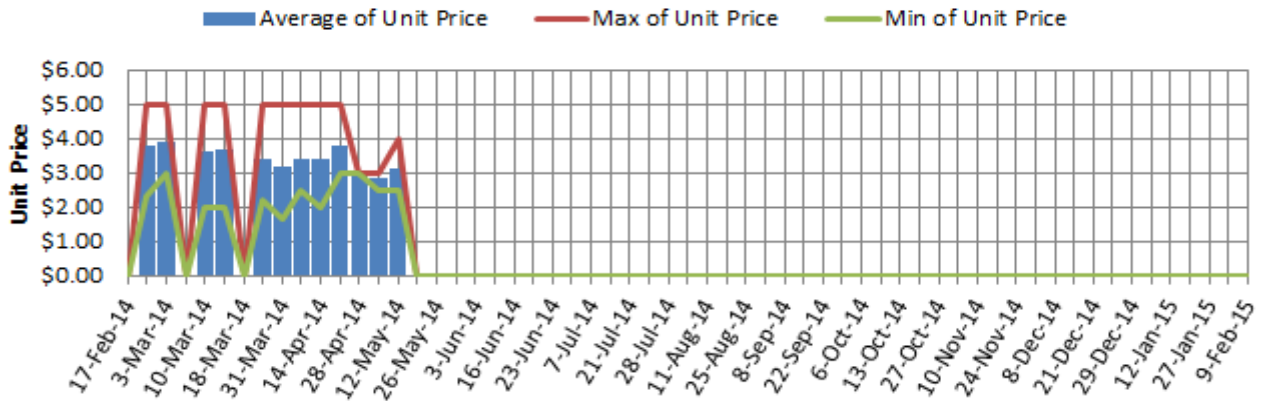


Hass Avocado Average Retail Prices - Perth

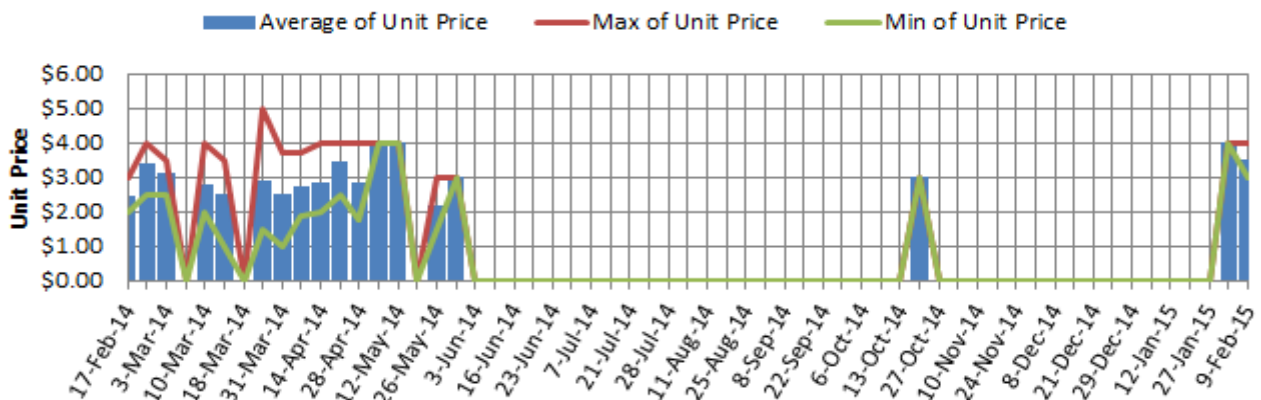


Assessment date (Week Commencing)

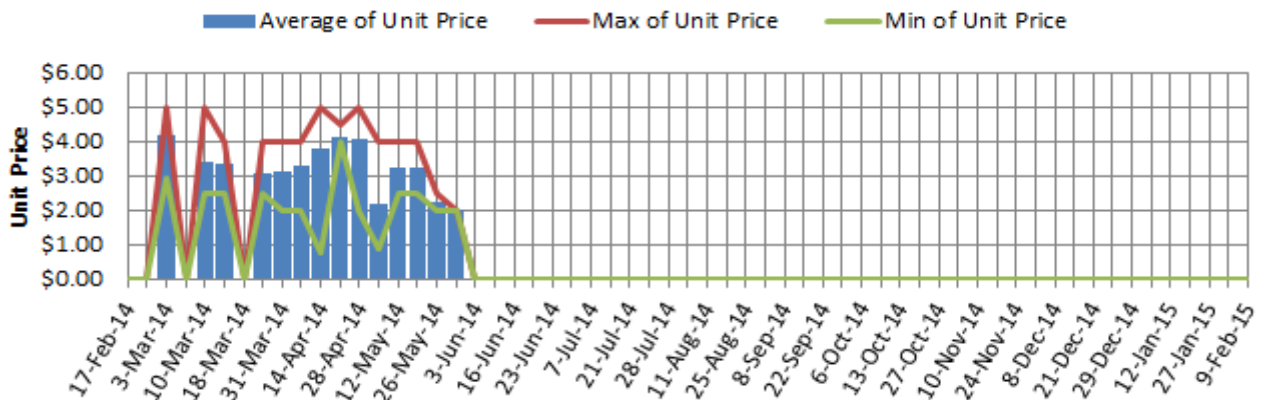
Shepard Avocado Average Retail Prices - Sydney



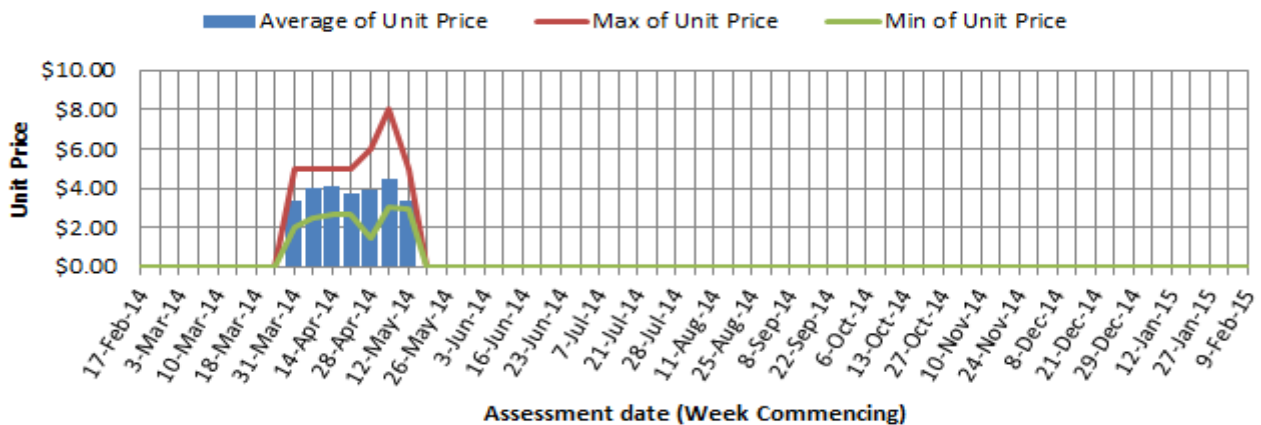
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Assessment date (Week Commencing)

Retail Prices by City, Store and Variety – 9th February 2015

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	290	1.79	Store	NZ	Coles	Hass	230	2.50	Store	Aus
Woolworths	Hass	290	2.98	No	NZ	Coles	Hass	270	2.50	Store	Aus
Woolworths	Hass	260	2.98	No	NZ	Coles	Hass	280	2.50	Store	Aus
Coles	Hass	250	2.98	No	NZ	Woolworths	Hass	230	3.48	No	Aus
Coles	Hass	260	2.98	No	NZ	Woolworths	Hass	290	3.48	No	Aus
IGA	Hass	230	2.98	No	NZ	Woolworths	Hass	340	3.48	No	Aus
Coles	Hass	280	2.98	No	NZ	I	Hass	240	3.99	No	Aus
I	Hass	240	3.69	No	Aus	IGA	Hass	270	3.99	No	Mixed
IGA	Hass	240	3.95	No	Mixed	I	Hass	330	3.99	No	Aus
I	Hass	260	3.99	No	Aus	I	Reed	450	3.99	No	Aus
Foodworks	Hass	300	3.99	No	NZ	I	Hass	320	3.99	No	Aus
I	Hass	250	3.99	No	Aus	I	Reed	450	3.99	No	Aus
I	Reed	400	3.99	No	Aus	I	Hass	260	3.99	No	Aus
I	Reed	380	3.99	No	Aus	I	Hass	350	4.98	No	Aus
I	Hass	280	3.99	No	Aus	PERTH					
I	Reed	380	3.99	No	Aus	I	Hass	210	2.48	No	Aus
I	Hass	310	4.99	No	Aus	Coles	Hass	175	2.98	No	Aus
I	Reed	440	4.99	No	Aus	Woolworths	Hass	235	2.98	No	Aus
I	Hass	340	4.99	No	Mixed	Woolworths	Hass	215	2.98	No	Aus
I	Reed	390	4.99	No	Aus	Coles	Hass	180	2.98	No	Aus
I	Hass	330	4.99	No	Aus	Woolworths	Hass	210	2.98	No	Aus
I	Reed	470	5.99	No	Aus	Coles	Hass	190	2.98	No	Aus
BRISBANE						I	Hass	250	2.99	No	Aus
I	Hass	320	0.99	Store	NZ	IGA	Hass	255	3.49	No	Aus
I	Hass	330	2.49	Store	NZ	IGA	Hass	190	3.69	No	Aus
I	Hass	180	2.49	No	NZ	I	Hass	260	3.99	No	Aus
Woolworths	Hass	240	2.98	Store	Aus	IS	Hass	285	3.99	No	Aus
Coles	Hass	240	2.98	No	NZ	IGA	Hass	340	3.99	No	Aus
Coles	Hass	260	2.98	No	NZ	I	Hass	260	3.99	No	Aus
Woolworths	Hass	280	2.98	No	Aus	I	Hass	300	3.99	No	Aus
Woolworths	Reed	420	2.98	No	Aus	IGA	Hass	375	4.49	No	Aus
Woolworths	Hass	290	2.98	No	Aus						
Coles	Hass	290	2.98	No	NZ						
I	Hass	280	2.99	No	NZ						
I	Shepard	250	2.99	No	Aus						
I	Hass	300	2.99	No	NZ						
I	Reed	500	2.99	No	Aus						
IGA	Hass	210	3.48	No	NZ						
I	Hass	300	3.99	No	NZ						
IGA	Hass	295	3.99	No	NZ						
I	Hass	325	3.99	No	NZ						
I	Shepard	390	3.99	No	Aus						
I	Hass	372	4.29	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