



INFOCADO WEEKLY REPORT: 16th — 22nd February 2013 (Wk 8)



Comments

- Following the poor Dry Matter results for North Queensland which were published last week, we are undertaking more testing this week. Results should hopefully be available for next week's Infocado report. Packers and wholesalers need to work together to ensure only mature fruit is placed into the market. Immature fruit adversely impacts on consumer demand with long term consequences for the industry.
- Sydney Woolworths stores have a catalogue special in place this week. Coles stores in Melbourne and Sydney have catalogue specials in place for both Hass and Shepard. There are a number of store specials in place in Brisbane this week.
- An updated New Zealand seasonal forecast has been included on page three.
- Please ensure when updating your four weekly forecast you include forecasts through to week four. The forecasts for earlier weeks can be adjusted as well if needed.
- A reminder for packers just starting to enter dispatch data this season:
 - Bulk: when entering data the total number of 10kg packs should be recorded; not the total number of kilograms.
 - P/Pk (prepacks)/Oil/Proc (processing)/Other: when entering data in these sections the total volume in kilograms should be recorded.
 - Trader: fruit sent to a central market wholesaler, produce merchant or other wholesaler.
 - Direct: fruit being sent directly to retailers (supermarkets).

[Click here to learn How to conduct Dry Matter tests at home](#)

[Click here to for a refresher on how to contribute to Infocado](#)

[Click here for tips for using and interpreting Infocado Reports](#)

[Click here to download avocado supply chain education materials](#)

What you need to be aware of for next month

- Growers about to start their 2013 season are reminded to ensure their fruit is mature before harvest. The Shepard benchmark is 21% Dry Matter and the Hass benchmark is 23%.
- According to the January 2013 Quarterly Report 959,693 5.5kg eqv trays are expected in the market place for March. 232,825 5.5kg eqv trays are Hass, 722,700 5.5kg eqv trays are expected for Shepard with the remainder being other varieties.
- Growers in flood affected areas will be monitoring their trees for signs of stress from water logging and related issues.
- Western Australian growers will be scaling down their harvesting. New Zealand imports are all but finished.
- Some Central Queensland growers will begin harvesting Shepards.

Upcoming Holidays

4th March - Labour Day WA | 11th March - Adelaide Cup Day SA, Labour Day VIC & Canberra Day ACT | 29th March - Good Friday |

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:

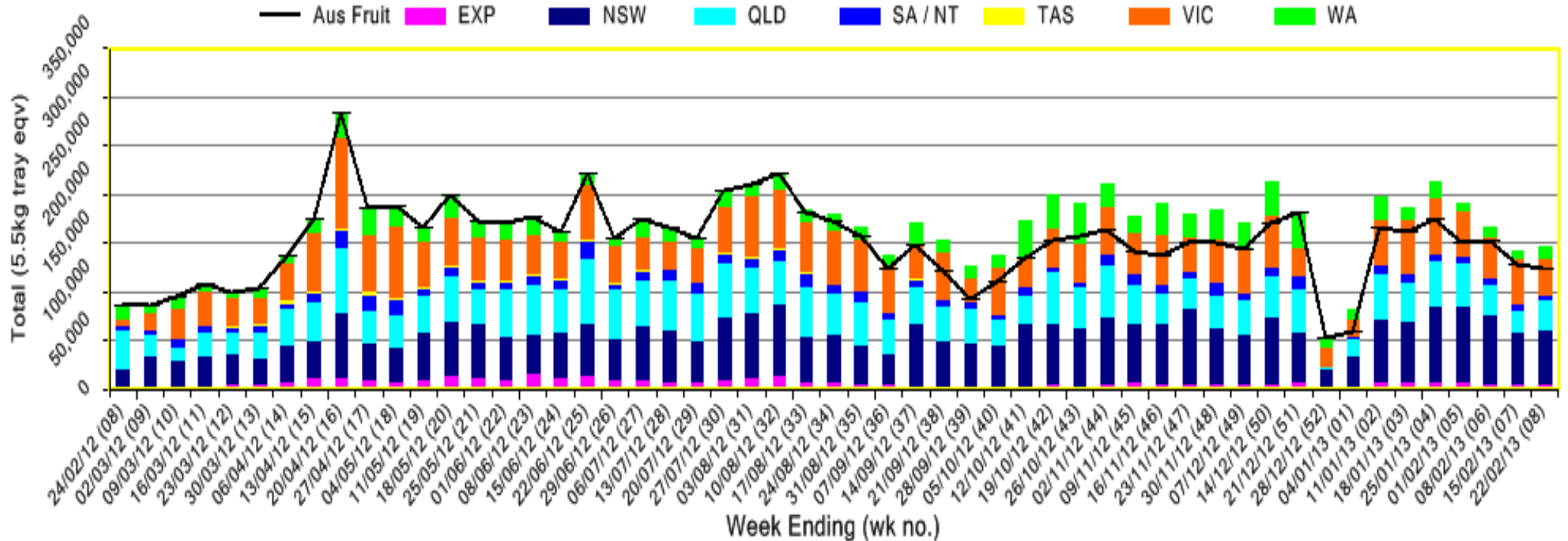
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons 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 : 16th February - 22nd February 2013 (Wk 8)

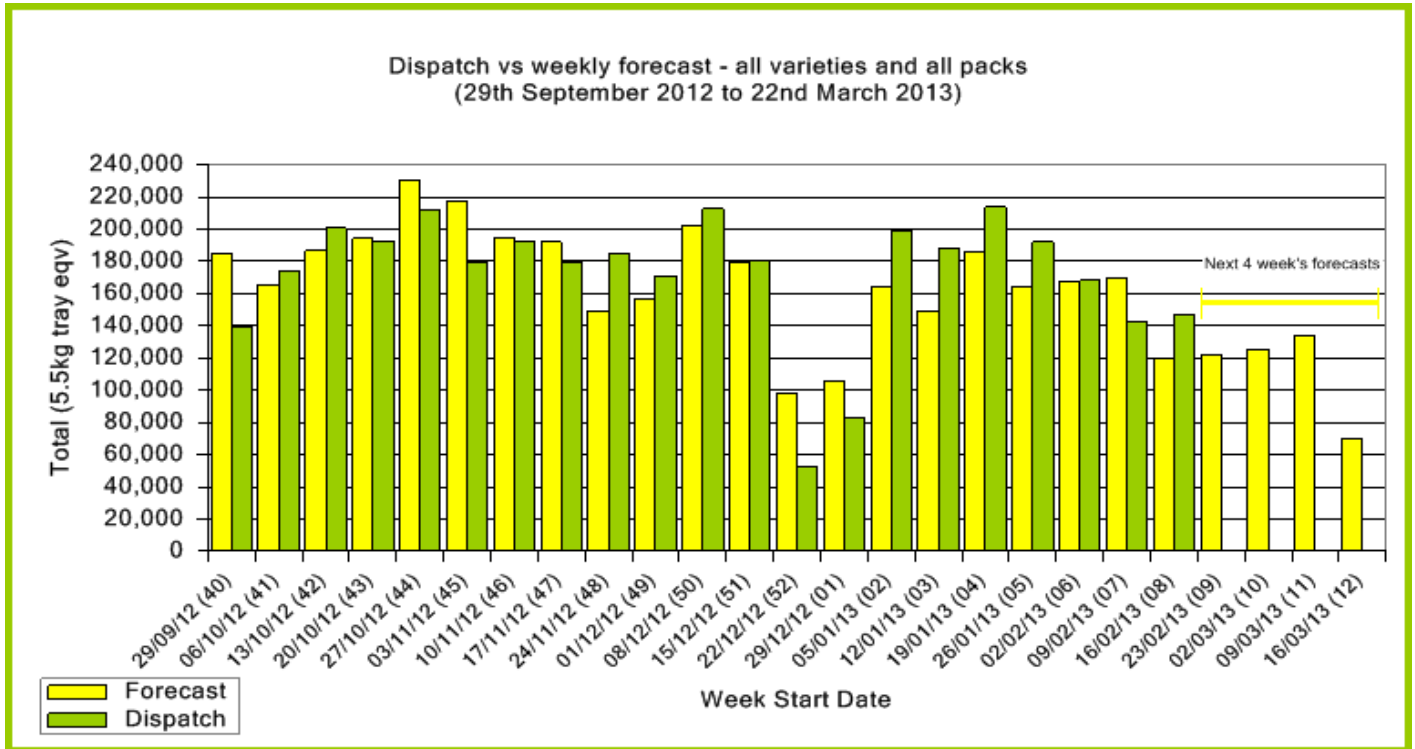
Dest. State	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	5.5kg	Trays - Total	Bulk	P/PK	Proc	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
EXP						50		1,530	2,168	3,748	768	550			5,244
NSW	3,272	5,218	8,643	15,156	174	7,444	4,500	2,153	1,815	48,375	3,030	1,980			54,244
QLD	528	618	1,743	3,145	706	4,212	9,406	4,347	773	25,478	1,791	735	800	12,540	31,293
SA / NT	320	320	1,600	1,441		990	250	839		5,760					5,760
VIC	1,978	4,281	4,842	8,803	660	7,281	4,878	1,166	866	34,755	1,101				36,757
WA	293	369	553	1,017		3,164	2,772	379	75	8,622	2,642				13,426
Total	6,391	10,806	17,381	29,562	1,540	23,141	21,806	10,414	5,697	126,738	9,332	3,265	800	12,540	146,724

Throughput Australian & NZ avocados by destination state
 Throughput 1st January 2013 to date = 1,332,995 5.5kg tray eqv



Forecast Data (Week 8 - 12)						
Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 8 - begin 16/02/2013						
Hass	72,468	3,657	1,000	50		79,308
Shepard	35,750	2,632				40,535
Week Total	108,218	6,289	1,000	50		119,844
Week 9 - begin 23/02/2013						
Hass	50,620	2,780	1,000	50	5,000	56,775
Shepard	59,500	3,028	1,500			65,278
Week Total	110,120	5,808	2,500	50	5,000	122,053
Week 10 - begin 02/03/2013						
Hass	44,390	2,378	1,000	50	5,000	49,814
Shepard	69,800	3,128	1,500			75,760
Week Total	114,190	5,506	2,500	50	5,000	125,574
Week 11 - begin 09/03/2013						
Hass	44,060	2,335	1,000	50	5,000	49,405
Shepard	77,600	3,672	1,500			84,549
Week Total	121,660	6,007	2,500	50	5,000	133,955
Week 12 - begin 16/03/2013						
Hass	1,020	25		50		1,074
Shepard	63,500	2,584	1,500			68,471
Week Total	64,520	2,609	1,500	50		69,546

Green shading indicates dispatch data				Yellow shading indicates forecast data		
Dispatch Data (Week 8 - begin 16/02/2013)						
Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Hass	87,337	6,196	2,530		12,540	101,342
Reed	8,207	20				8,243
Shepard	31,194	3,116	735	800		37,138
Total	126,738	9,332	3,265	800	12,540	146,724



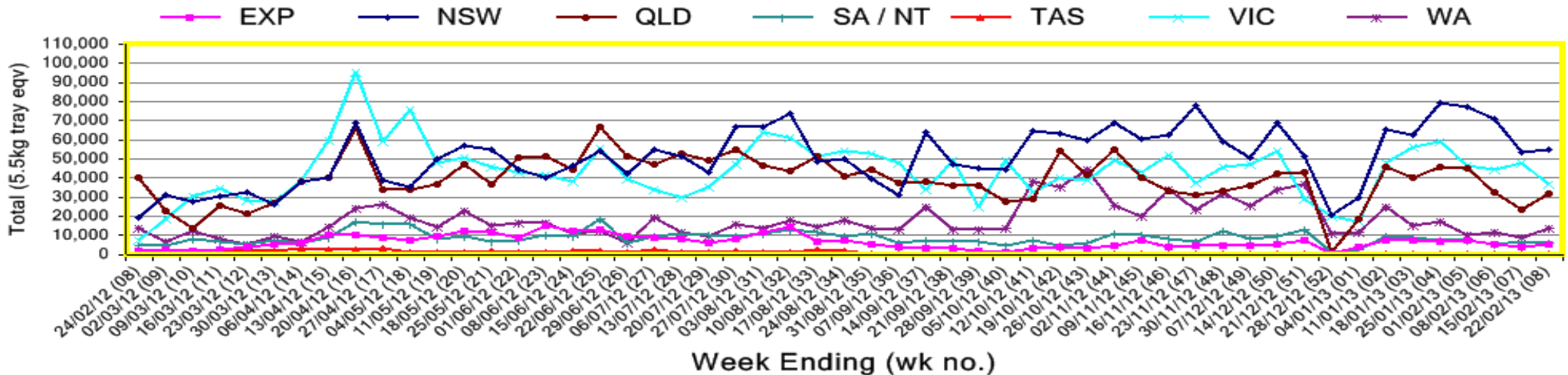
New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) August 2012-April 2013										
Export Dest'n	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to date
NZ Export to Australia Forecast	0	100,000	163,165	200,288	221,573	201,354	75,000	20,000	0	933,459
Australia	27,768	106,347	156,090	211,721	71,661	126,478	99,827			799,892
USA			7							
Japan	374	9,797	38,653							
Total	28,142	116,144	194,750	211,721	71,661	126,478	99,827			848,723

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

█ Dispatch for season so far as a proportion of regional forecast
█ 12 month relative regional Forecast



Throughput Australian & NZ avocados by destination state
Throughput 1st January 2013 to date = 1,332,995 5.5kg tray eqv



Week 8 contributors - Packhouses

- | | |
|--|-----------------------------|
| Advance Packing & Marketing Services P/L | Lavers Orchards |
| Aussie Orchards Growers & Packers | Lone Gum Avocados |
| Avocado Estates | Mariners Rest |
| Avocado Industry Council (NZAGA) | Natures Fruit Company |
| Bellview Orchards Pty Ltd | One Harvest |
| Blushing Acres Pty Ltd | R & M Waterman |
| Box Organics | Sunfresh |
| Delroy Orchards | Tinaroo Falls Avocado Trust |
| Gunnado Farm | VP & EA Farrell |
| Hilltop Mareeba | Willow Creek |
| ID & AM Leighton | |

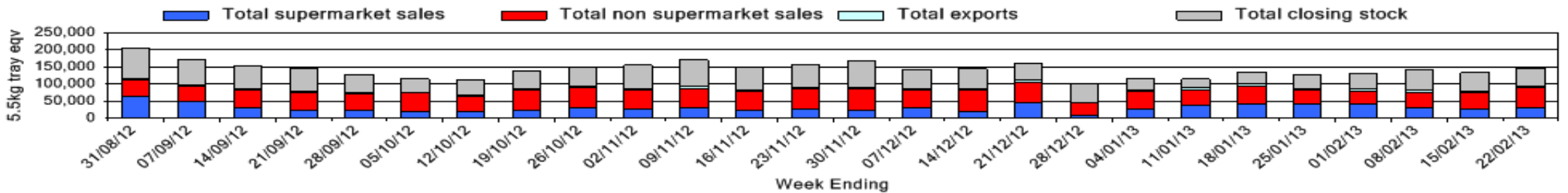
Week 8 contributors - Wholesalers

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

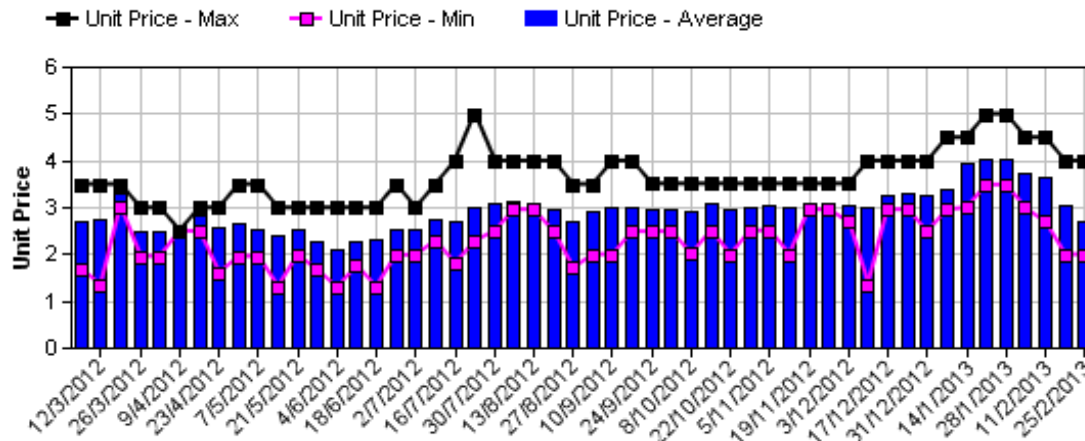
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	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		1,787		1,787												1,787		1,787
Total non supermarket sales	7,664		134	7,798	1,056		12	1,068	1,942						9,584		156	9,740
Total exports																		
Total sales	7,664	1,787	134	9,585	1,056		12	1,068	1,942					9,584	1,787	156	11,527	
Total Stock on Hand	1,433			1,433	384			384	698					2,131				2,131
QLD																		
Total supermarket sales	3,329	4,616		7,945										3,329	4,616		7,945	
Total non supermarket sales	14,093	2,658	369	17,120		1,523		1,523	2,769					14,093	5,427	369	19,889	
Total exports																		
Total sales	17,422	7,274	369	25,065		1,523		1,523	2,769					17,422	10,043	369	27,834	
Total Stock on Hand	12,180	1,363		13,543		504		504	916					12,180	2,279		14,459	
SA & TAS																		
Total supermarket sales	6,200			6,200	99			99	180					6,380			6,380	
Total non supermarket sales	5,294		855	6,149	685		13	698	1,269					6,539		879	7,418	
Total exports																		
Total sales	11,494		855	12,349	784		13	797	1,449					12,919		879	13,798	
Total Stock on Hand	10,169		2,122	12,291	471		13	484	880					11,025		2,146	13,171	
VIC																		
Total supermarket sales	9,720	2,128		11,848	81	472		553	1,005					9,867	2,986		12,853	
Total non supermarket sales	7,844	1,323	3,555	12,722	564	206	96	866	1,575					8,870	1,697	3,730	14,297	
Total exports																		
Total sales	17,564	3,451	3,555	24,570	645	678	96	1,419	2,580					18,737	4,683	3,730	27,150	
Total Stock on Hand	10,223	558	4,947	15,728	490	-1		489	889					11,114	556	4,947	16,617	
WA																		
Total supermarket sales	2,718			2,718										2,718			2,718	
Total non supermarket sales	4,428		407	4,835	905			905	1,645					6,073		407	6,480	
Total exports	3,748			3,748	768			768	1,396	550			550	100	5,244		5,244	
Total sales	10,894		407	11,301	1,673			1,673	3,042	550			550	100	14,036		407	14,443
Total Stock on Hand	6,067		47	6,114	312		13	325	591					6,634		71	6,705	
Total																		
Total supermarket sales	21,967	8,531		30,498	180	472		652	1,185					22,294	9,389		31,683	
Total non supermarket sales	39,323	3,981	5,320	48,624	3,210	1,729	121	5,060	9,200					45,160	7,124	5,540	57,824	
Total exports	3,748			3,748	768			768	1,396	550			550	100	5,244		5,244	
Total sales	65,038	12,512	5,320	82,870	4,158	2,201	121	6,480	11,782	550			550	100	72,698	16,513	5,540	94,752
Total Stock on Hand	40,072	1,921	7,116	49,109	1,657	503	26	2,186	3,975					43,085	2,836	7,163	53,084	

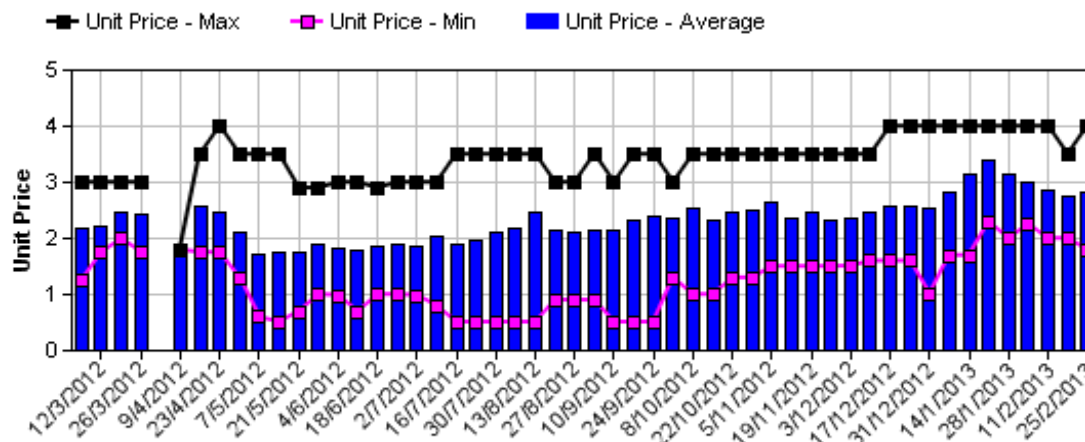
Weekly National Sales



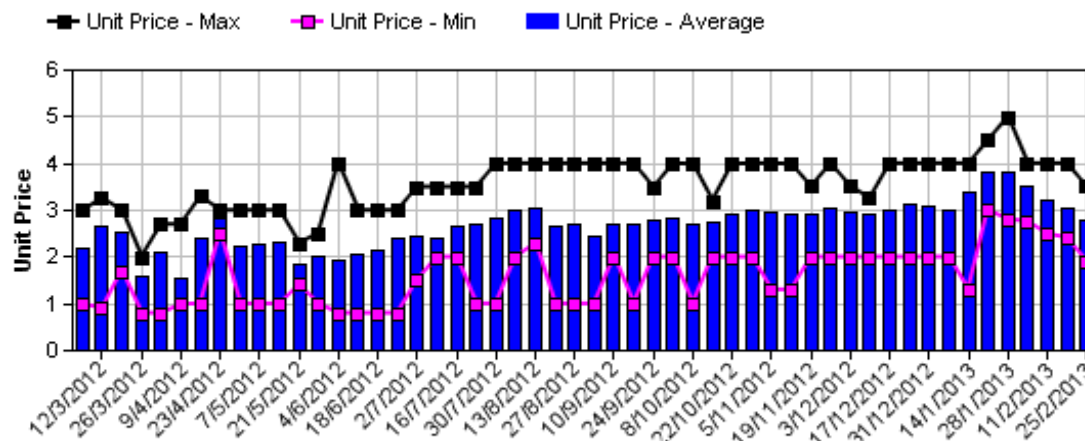
Hass Avocado Average Retail Prices - Sydney



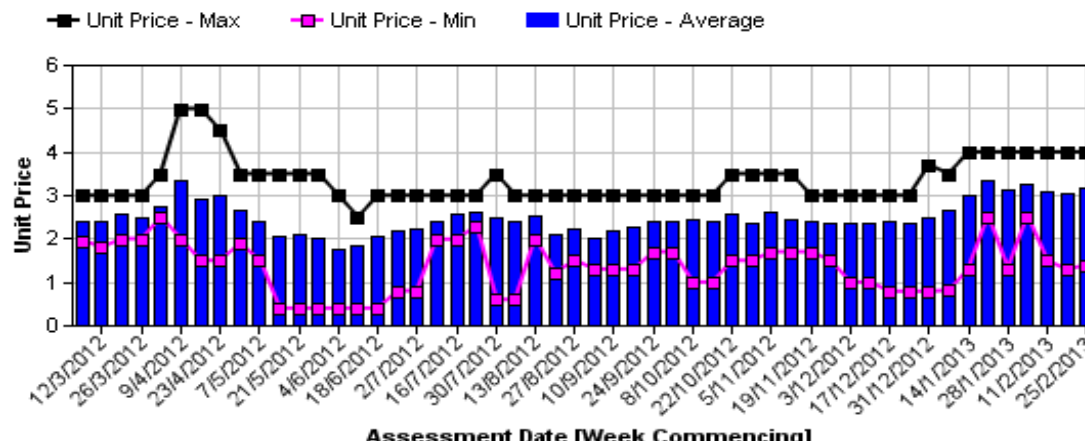
Hass Avocado Average Retail Prices - Brisbane



Hass Avocado Average Retail Prices - Melbourne

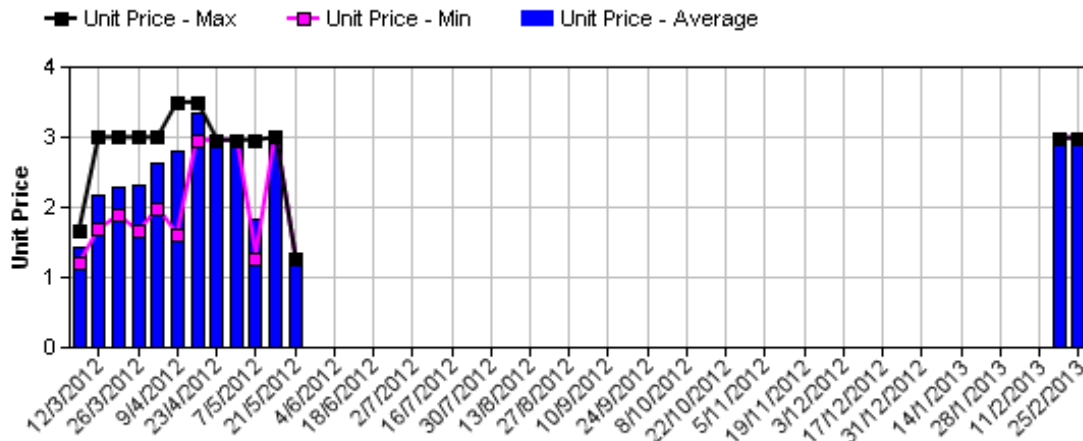


Hass Avocado Average Retail Prices - Perth

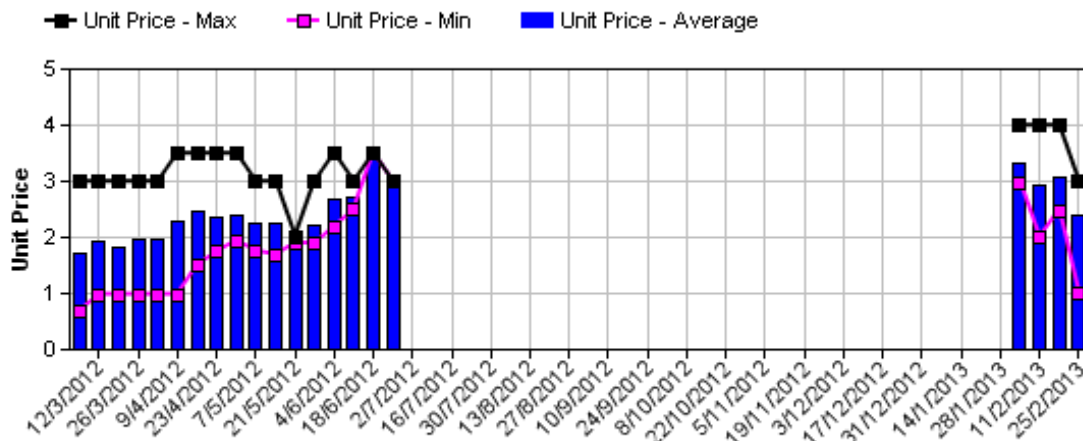


Assessment Date [Week Commencing]

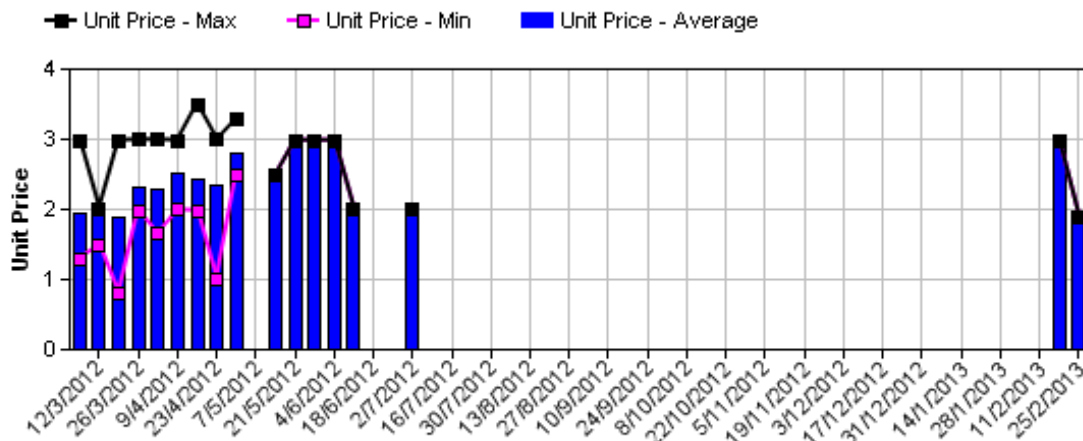
Shepard Avocado Average Retail Prices - Sydney



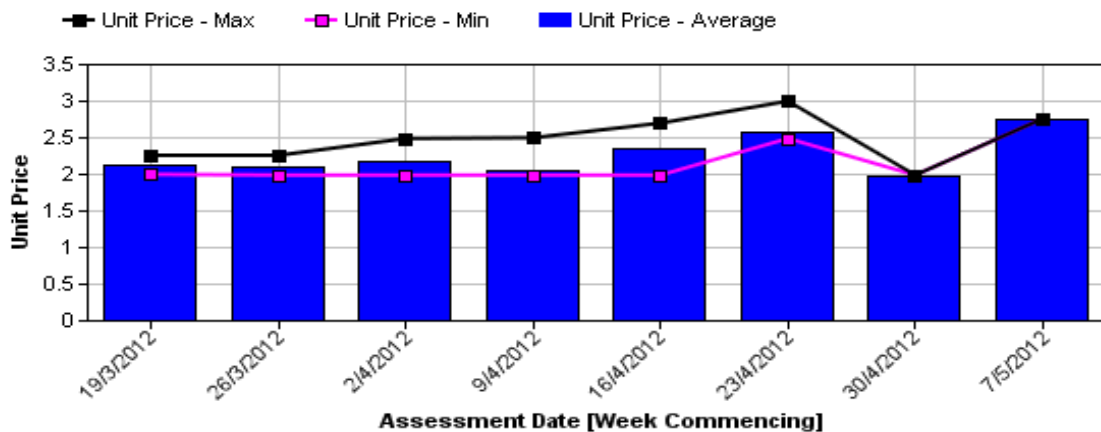
Shepard Avocado Average Retail Prices - Brisbane



Shepard Avocado Average Retail Prices - Melbourne



Shepard Avocado Average Retail Prices - Perth



Retail Prices by City, Store and Variety - 25th February 2013

Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin	Store	Var	Av Wt (g)	Unit Price	Special	Country of Origin
SYDNEY						MELBOURNE					
IGA	Hass	220	1.99	Store	Mixed	Coles	Hass	250	1.90	Cat	Aus
I	Hass	320	1.99	Store	Aus	Coles	Shepard	225	1.90	Cat	Aus
I	Hass	330	1.99	Store	Aus	Coles	Hass	240	1.90	Cat	Aus
I	Hass	290	2.00	Store	Aus	Coles	Shepard	250	1.90	Cat	Aus
Woolworths	Hass	270	2.48	Cat	Aus	Coles	Hass	230	1.90	Cat	Aus
Woolworths	Hass	270	2.48	Cat	Aus	Coles	Shepard	255	1.90	Cat	Aus
Woolworths	Hass	270	2.48	Cat	Aus	I	Hass	275	2.49	No	Aus
Coles	Hass	260	2.98	Cat	Aus	I	Hass	235	2.69	No	NZ
Coles	Shepard	240	2.98	Cat	Aus	I	Hass	246	2.80	No	Aus
Coles	Shepard	260	2.98	Cat	Aus	Safeway	Hass	270	2.98	No	Aus
Coles	Shepard	250	2.98	Cat	Aus	Safeway	Hass	255	2.98	No	Aus
Coles	Hass	290	2.98	Cat	Aus	Safeway	Hass	245	2.98	No	Aus
I	Hass	255	2.99	No	Aus	I	Hass	270	2.98	No	Aus
I	Reed	470	2.99	No	Aus	I	Hass	265	2.99	No	NS
I	Reed	480	2.99	No	Aus	IS	Hass	245	2.99	No	NZ
Foodworks	Hass	270	2.99	No	Aus	IGA	Hass	230	2.99	No	Aus
I	Hass	260	2.99	No	Aus	I	Hass	263	2.99	No	Aus
I	Hass	260	2.99	No	Aus	I	Hass	315	3.50	No	Aus
IGA	Hass	270	3.50	No	Aus	I	Hass	295	3.50	No	Aus
I	Hass	320	3.99	No	Aus	PERTH					
I	Reed	440	3.99	No	Aus	IS	Hass	240	1.39	Store	Aus
BRISBANE						Woolworths	Hass	250	2.98	No	Aus
I	Shepard	95	1.00	Store	Aus	Coles	Hass	210	2.98	No	Aus
IGA	Shepard	240	1.79	Cat	Aus	Woolworths	Hass	210	2.98	Store	Aus
IGA	Hass	165	1.79	Cat	Aus	Coles	Hass	210	2.98	No	Aus
Woolworths	Hass	190	1.98	No	Aus	Coles	Hass	235	2.98	No	Aus
I	Shepard	170	1.99	Store	Aus	Woolworths	Hass	210	2.98	Store	Aus
I	Shepard	240	2.50	Store	Aus	I	Hass	270	2.99	No	Aus
I	Hass	245	2.79	Store	Aus	I	Hass	245	2.99	No	Aus
Coles	Shepard	220	2.98	No	Aus	IGA	Hass	260	2.99	No	Aus
Coles	Shepard	210	2.98	No	Aus	I	Hass	330	3.49	No	Aus
Woolworths	Hass	310	2.98	No	Aus	IGA	Hass	245	3.49	No	Aus
Coles	Shepard	250	2.98	No	Aus	I	Hass	285	3.69	No	Aus
Woolworths	Reed	310	2.98	No	Aus	IGA	Hass	290	3.99	No	Aus
Woolworths	Hass	340	2.98	No	Aus	I	Hass	285	3.99	No	Aus
I	Hass	200	2.99	No	Mixed	IGA	Hass	295	3.99	No	Aus
I	Shepard	250	2.99	No	Aus						
I	Hass	255	3.00	Store	Aus						
I	Hass	340	3.99	Store	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