Infocado weekly report

Week 15-2018 (07 - 13 April 2018)

Conduct dry matter tests at home

What is Infocado?

Using and interpreting Infocado reports

Avocado supply chain education materials

Weekly summary:

- For quality assurance, please remind growers before picking to ensure a DM of at least 21% DM for Shepard and 23% for Hass.
- **Hass season has started, don't forget to enter your 4week forecasts!**
- Total dispatch was 218,942, a slight increase on the previous week, and lower than the forecast of 250,609.
- NQ supplied the majority of fruit at 64%, followed by CQ at 31%. SC & CNSW supplied the remaining 5% of fruit.
- The seasonal progress graph on p.4 is now reporting all regions in the 2018 season. The latest seasonal forecast from NZ packers indicates that NZ are expecting to export 2.8 million trays to Australia between August 2018 and March 2019.
- The average online single avocado price for the reported week was $2.32, again a decrease on the previous week—see p.6

Marketing update: new creative is coming!

A new television ad for Australian Avocados will be launched on 29 April, as part of the new '*Avocados make everything better – Smash an Avo*' campaign. Building confidence around selection, storage and ripening and repositioning avocados from a luxury item to an everyday item needed for a healthy lifestyle are further key messages for the campaign. The industry's marketing activities are funded by grower levies. See the latest marketing activity that's helping Aussie consumers connect with (and eat!) Australian Avocados. Read more.

Upcoming public holidays affecting Infocado deadlines

Mon 07 May: Public holiday in Qld: enter data by 11am Tuesday 08 May, report will be distributed on Wed instead of Tue.

Report Index

p2: 4week forecast; import data | p3: dispatches | p4: dispatches by region; contributors | p5: wholesale data | pp.6 & 7 retail prices

REPORT NOTES:

The **Weekly Infocado** report is compiled using data contributed by avocado packhouses, consolidators and wholesalers through the Infocado system. We estimate that 85% of industry is represented in this report. Please note that **Quarterly Infocado** reports incorporate an allowance (by region) for the data which is not contributed to the Infocado system. It is thus, not possible to extrapolate the figures from **Weekly Infocado** reports to those in **Quarterly Infocado** reports.

Initially, this report is provided to Infocado contributors only, then publicly released six weeks later. Until public release, the report is confidential.

This report has been funded by Hort Innovation, using the avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

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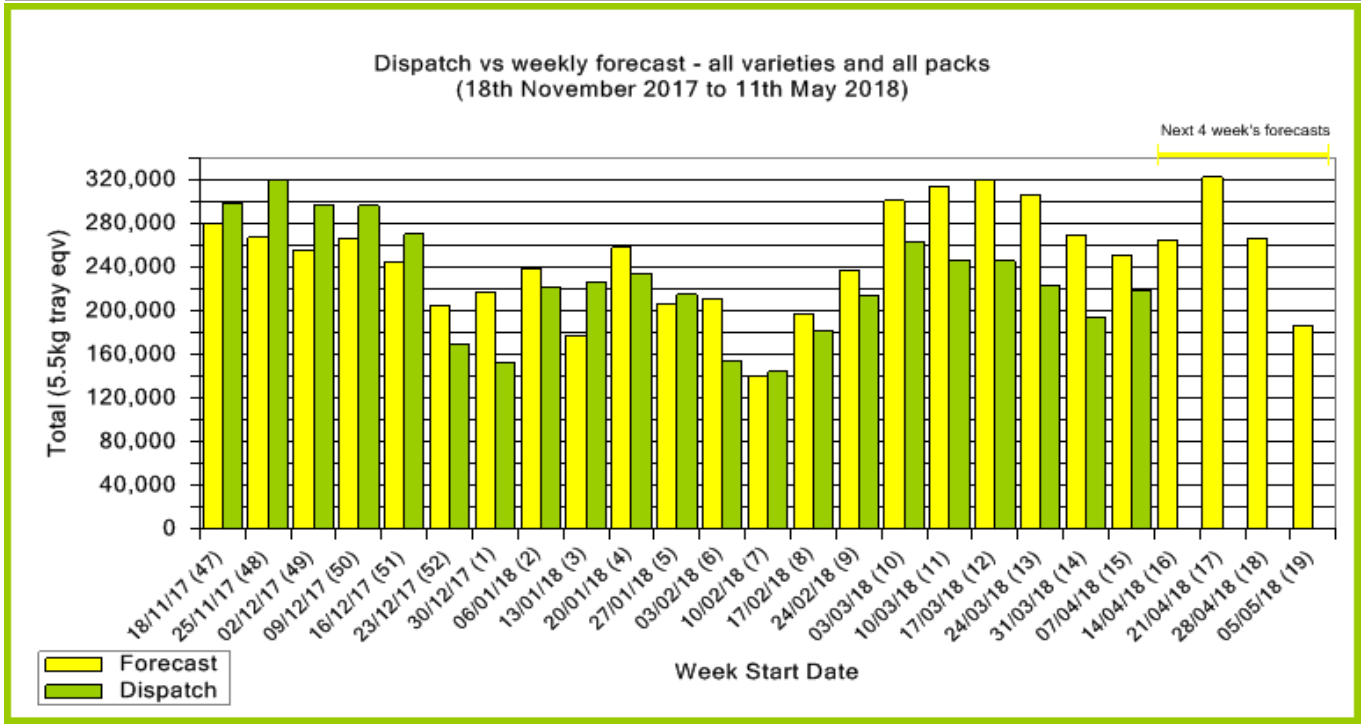
Yellow shading indicates forecast data

Forecast Data (Week 15 - 19)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 15 - begin 07/04/2018					
Fuerte	200				**200**
Hass	34,820	3,704		1,850	**41,891**
Other	300				**300**
Shepard	186,800	8,160	2,500	12,200	**204,309**
Wurtz	2,600	520		2,000	**3,909**
Week Total	**224,720**	**12,384**	**2,500**	**16,050**	**250,609**
Week 16 - begin 14/04/2018					
Fuerte	200				**200**
Hass	76,500	5,822		6,300	**88,230**
Other	200				**200**
Shepard	165,800	4,600	2,000	11,300	**176,583**
Wurtz	100				**100**
Week Total	**242,800**	**10,422**	**2,000**	**17,600**	**265,313**
Week 17 - begin 21/04/2018					
Hass	163,500	5,872		6,300	**175,321**
Shepard	139,300	4,200		4,000	**147,663**
Week Total	**302,800**	**10,072**		**10,300**	**322,986**
Week 18 - begin 28/04/2018					
Hass	178,500	5,972		3,700	**190,031**
Shepard	74,000	800		4,000	**76,182**
Week Total	**252,500**	**6,772**		**7,700**	**266,213**
Week 19 - begin 05/05/2018					
Hass	173,500	4,492		6,000	**182,758**
Shepard	4,000	200			**4,364**
Week Total	**177,500**	**4,692**		**6,000**	**187,122**

Green shading indicates dispatch data

Dispatch Data (Week 15 - begin 7/04/2018)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Fuerte	**204**	8			**219**
Hass	**20,393**	2,747			**25,388**
Shepard	**161,295**	14,808	3,720	7,164	**190,198**
Wurtz	**2,898**	132			**3,138**
Total	**184,790**	**17,695**	**3,720**	**7,164**	**218,942**



New Zealand avocado exports: forecast v dispatch (5.5kg eqv trays) August 2017 - March 2018

	NZ export destination	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Total
Forecast	Aus: pre-season forecast [1] at 31/07/2017	6,500	108,060	265,640	333,040	596,740	491,700	366,820	15,520	**2,184,020**
	Aus: seasonal forecast [2] (updated 18/12/2017)	6,500	134,398	268,640	331,660	555,741	394,387	226,002	0	
ABS data	Australian imports of NZ product [3]	19,694	223,985	400,070	465,822	521,732	340,510	88,097	Not avail. yet	
Dispatch	Aus: dispatches via Infocado [2]	13,555	166,007	307,907	359,298	503,794	292,002	121,295	0	**1,763,858**
	Japan [4]	0	7,646	35,727	29,375	6,105	0	0	0	**78,853**
	China [4]	n/a	n/a	n/a	n/a	n/a	n/a	165	55	**220**
	Other Asia [4]	22,927	71,099	88,605	80,953	59,102	30,680	7,346	507	**361,219**

[1] Source: Infocado, pre-season forecast provided by NZ at start of season

[2] Source: Infocado data provided by NZ to current report date, each month's forecast is set in the previous month

[3] Source: Based on ABS data

[4] Source: NZStats—Infoshare - provisional for three months from release

grey Forecast is set and can no longer be updated

red text Data not yet complete for the month / season

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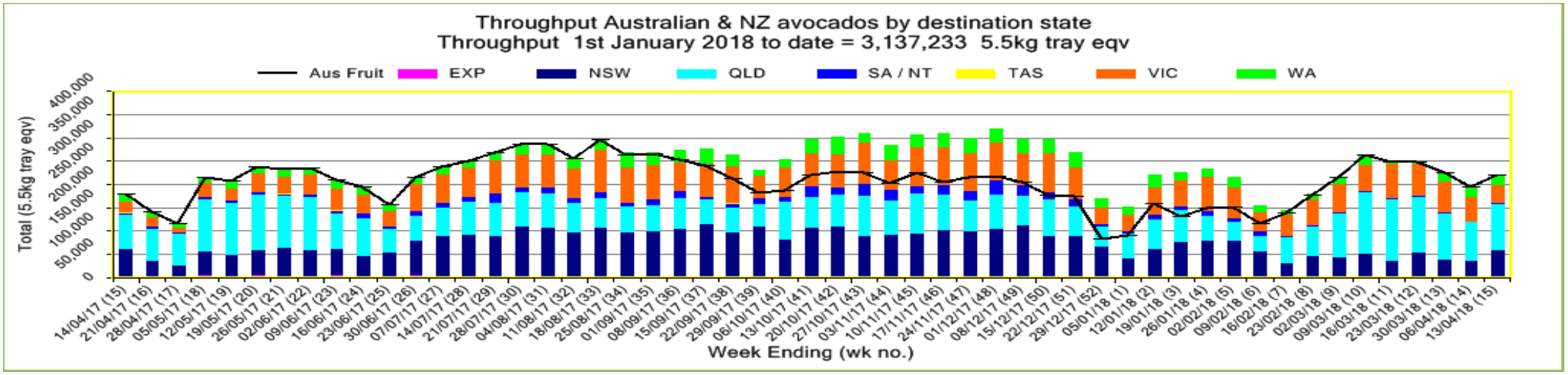
Origin of dispatched avocados

Industry Dispatches By Origin Region and Count Size : 7th April - 13th April 2018 (Wk 15)														
Origin Region	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**Trays - Total**	**Bulk**	**P/PK**	**Proc**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Kg**	**Total**
Central NSW		139	126	302		89	50	21		**727**	69			**852**
Central Qld		2,896	7,673	15,536		12,306	10,311	3,958	833	**53,513**	7,441		724	**67,174**
North Qld	29	5,309	8,159	38,698	1,441	27,557	19,460	19,590	1,849	**122,092**	8,665	3,720	6,440	**139,694**
Sunshine Coast	104	303	1,055	1,366	487	733	1,704	1,301	1,405	**8,458**	1,520			**11,222**
	133	**8,647**	**17,013**	**55,902**	**1,928**	**40,685**	**31,525**	**24,870**	**4,087**	**184,790**	**17,695**	**3,720**	**7,164**	**218,942**

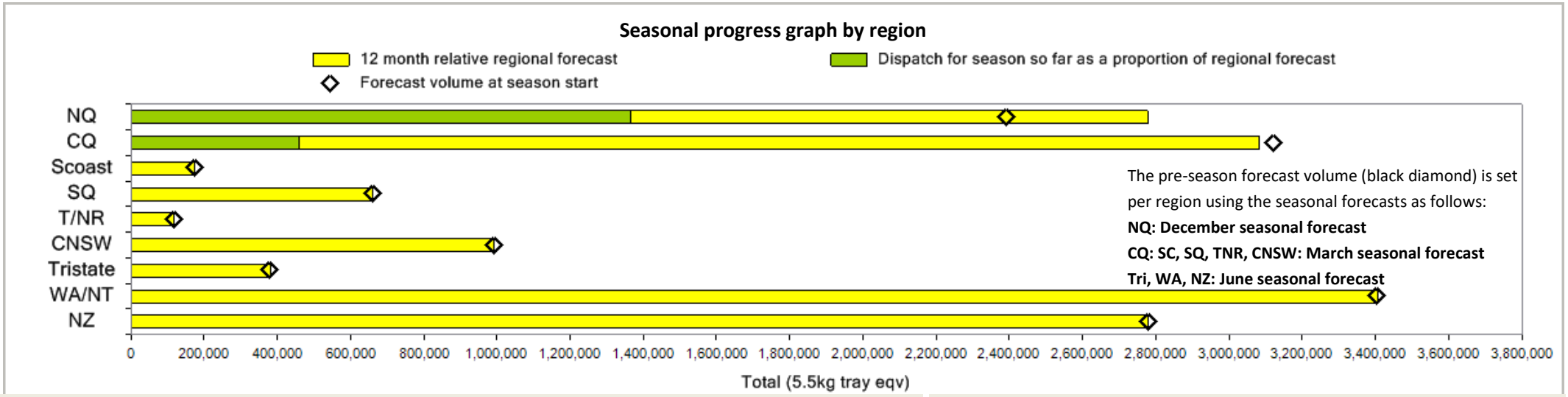
Note: NZ dispatch volumes by Count Size are estimated based on the Count Size distribution of NZ exports to all markets; and NZ dispatch volumes are reported in the week the volumes are expected to arrive in Australia, this is usually approximately one week after being shipped.

Destination of dispatched avocados

Industry Dispatches By Destination State and Count Size : 7th April - 13th April 2018 (Wk 15)														
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**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Kg**	**Total**
EXP									1,260	**1,260**	460			**2,096**
NSW	17	3,161	4,465	19,167	600	12,045	4,608	2,813	795	**47,671**	4,878	514		**56,633**
QLD	59	3,074	10,046	19,895	763	15,267	13,236	15,575	1,425	**79,340**	10,503	326	7,164	**99,798**
SA / NT			92	327		221	160	160	160	**1,120**	363			**1,780**
TAS								465		**465**				**465**
VIC	57	2,406	2,318	13,840	565	8,625	6,022	2,325	328	**36,486**	990	2,880		**38,810**
WA		6	92	2,673		4,527	7,499	3,532	119	**18,448**	501			**19,359**
Total	**133**	**8,647**	**17,013**	**55,902**	**1,928**	**40,685**	**31,525**	**24,870**	**4,087**	**184,790**	**17,695**	**3,720**	**7,164**	**218,942**



The **seasonal progress graph** below uses seasonal forecast data; the total of each bar is the graph below is a result of: total monthly dispatches to date plus the remaining seasonal forecast which can be updated monthly.



Week 15-2018 Contributors - Packhouses

Costa Avocados (Consolidator)
Green Skin Avocados (Consolidator)
MacKays Marketing (Consolidator)
Natures Fruit Company (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Sunfresh (Consolidator)
Rockridge Fresh(Consolidator)
Costa Avocados/SuperPak (CQ)
Donovan Family Investment Trust (CQ)
Simpson Farms Pty Ltd (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Sunnyspot Packhouse Pty Ltd (CQ)
Aussie Orchards Growers & Packers (NQ)
Avocados with Altitude (NQ)
Battistin Orchards Pty Ltd (NQ)
Cobra Hill Orchards (NQ)
Costa Avocados/Avocado Estates (NQ)
Gunnado Farming Pty Ltd (NQ)
Manbulloo Ltd (NQ)
Rockridge Farming Pty Ltd (NQ)
Tinaroo Falls Avocado Trust (NQ)
CNSW: Less than 3 packhouse contributors

Week 15-2018 Contributors - Wholesalers

Costa Farms [Adelaide]
De Luca Banana Marketing Pty Ltd [Brisbane]
Etherington [Perth]
Favco Queensland Pty Ltd [Brisbane]
Fresh Choice WA Pty Ltd [Perth]
J.H.Leavy & Co [Brisbane]
LaManna Premier Group [Adelaide]
LaManna Premier Group [Melbourne]
LaManna Premier Group [Sydney]
Murray Bros [Brisbane]
Nutrano Produce Group [Brisbane]
Nutrano Produce Group [Sydney]
Sinclair & Antico (Aust) Pty Ltd [Sydney]
United Fresh [Adelaide]
VB Sculli [Melbourne]
WA Farm Direct [Perth]

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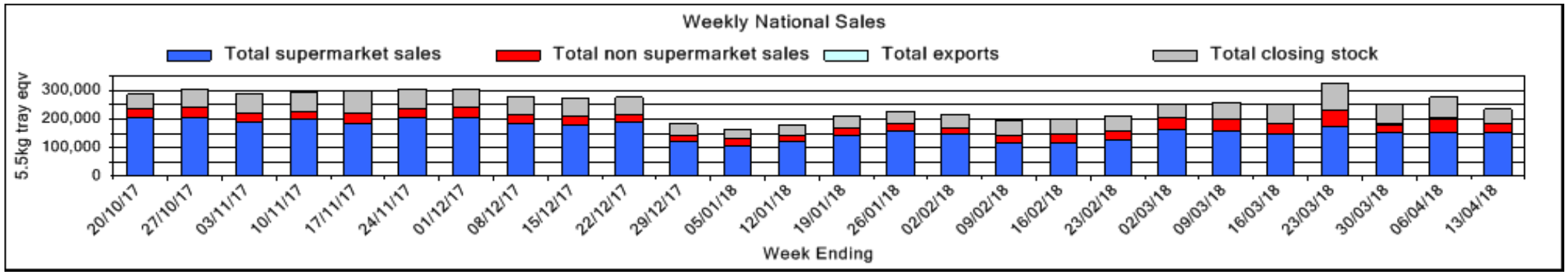
Sales report including direct sales from packhouses, wholesale sales and stock on hand at wholesale level

	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	8,160	31,280		39,440											8,160	31,280		39,440
Total non supermarket sales	1,041	1,196		2,237	294	3		297	540						1,576	1,201		2,777
Total exports																		
Total sales	9,201	32,476		41,677	294	3		297	540						9,736	32,481		42,217
Total Stock on Hand	97	170		267	249			249	453						550	170		720
QLD																		
Total supermarket sales	10,742	44,833		55,575	1,801			1,801	3,275						14,017	44,833		58,850
Total non supermarket sales		4,948		4,948		96		96	175							5,123		5,123
Total exports		1,260		1,260		460		460	836							2,096		2,096
Total sales	10,742	51,041		61,783	1,801	556		2,357	4,285						14,017	52,052		66,068
Total Stock on Hand	16,514	1,363		17,877		10		10	18						16,514	1,381		17,895
SA & TAS																		
Total supermarket sales	480	7,228		7,708											480	7,228		7,708
Total non supermarket sales	1,123	5,074		6,197	242	561	64	867	1,576						1,563	6,094	116	7,773
Total exports																		
Total sales	1,603	12,302		13,905	242	561	64	867	1,576						2,043	13,322	116	15,481
Total Stock on Hand	3,575	7,691	4	11,270	5,038	162	284	5,484	9,971						12,735	7,986	520	21,241
VIC																		
Total supermarket sales																		
Total non supermarket sales																		
Total exports																		
Total sales	159	36,291	1,493	37,943		166		166	302						159	36,593	1,493	38,245
Total Stock on Hand																		
WA																		
Total supermarket sales	2,231	13,232	158	15,621	34			34	62						2,293	13,232	158	15,683
Total non supermarket sales	5,593	161		5,754	957			957	1,740						7,333	161		7,494
Total exports																		
Total sales	7,824	13,393	158	21,375	991			991	1,802						9,626	13,393	158	23,177
Total Stock on Hand	5,015	188		5,203	454			454	825						5,840	188		6,028
Total																		
Total supermarket sales	21,772	125,154	366	147,292	1,835			1,835	3,336						25,108	125,154	366	150,628
Total non supermarket sales	7,757	19,089	1,285	28,131	1,493	826	64	2,383	4,333						10,472	20,591	1,401	32,464
Total exports		1,260		1,260		460		460	836							2,096		2,096
Total sales	29,529	145,503	1,651	176,683	3,328	1,286	64	4,678	8,505						35,580	147,841	1,767	185,188
Total Stock on Hand	25,201	12,561	272	38,034	5,741	185	284	6,210	11,291						35,639	12,897	788	49,325

Full data set not displayed because less than three wholesalers from this state contributed data this week



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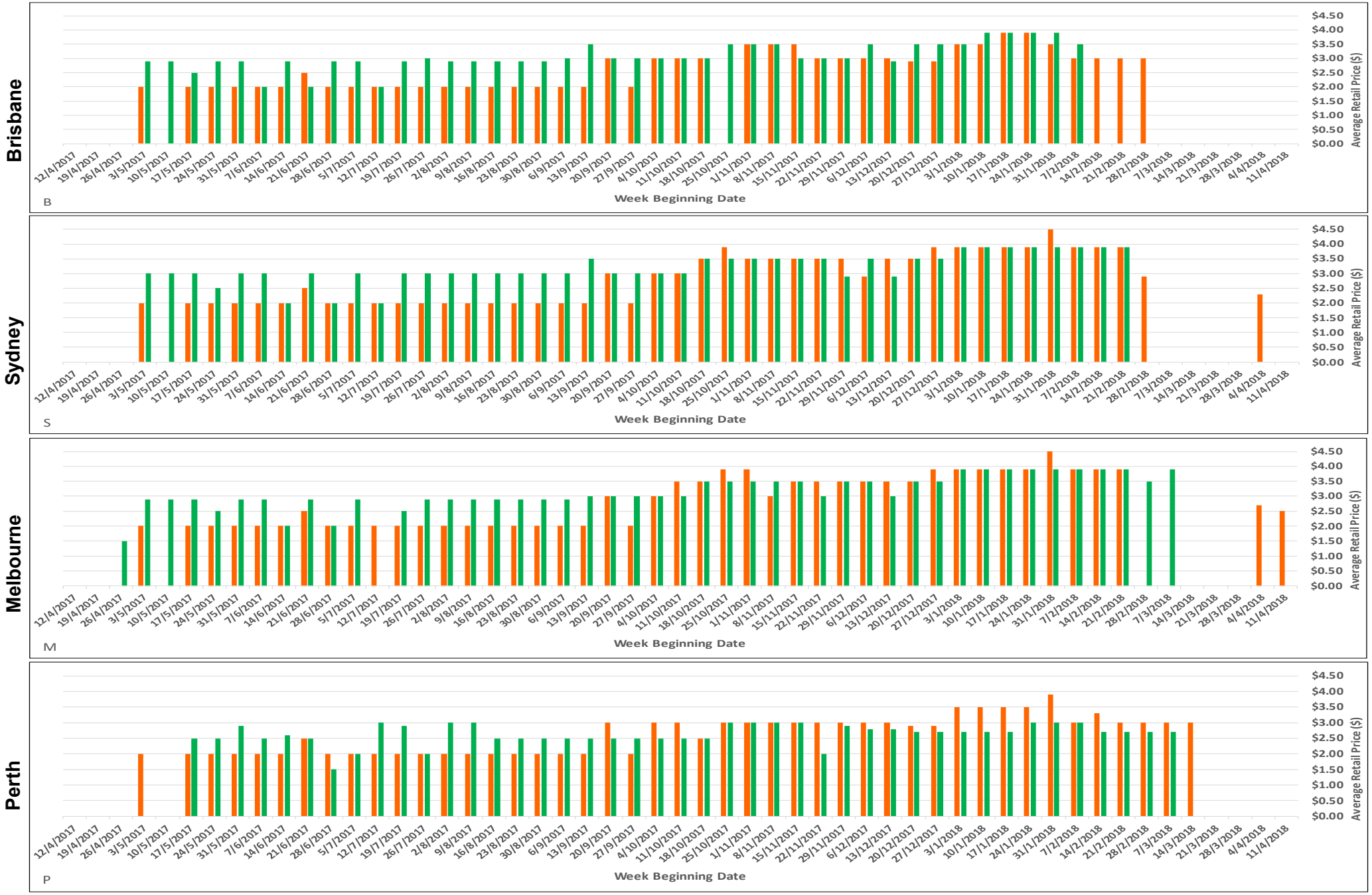
Hass avocado single fruit online retail pricing over 12 months: Coles and Woolworths **Key:** **Coles online** **Woolworths online**



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Avocado online retail pricing for Coles and Woolworths

Reporting period: Week 15-2018 (Wed 11/04/18 - Tue 17/04/18)

	Pack Type	Variety	Description	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass				$2.50 ↓	
	Single fruit	Shepard		$2.70 ↓	$2.00 ↓	$2.50 ↓	$2.70 ↓
	3 pack						
	Organic single						
	Organic 2 pack						
Woolworths	Single fruit	Hass					
	Single fruit	Shepard		$2.00	$2.00	$2.00	$2.50
	Multi-buy						
	3 pack	not indicated	Australian	$6.00	$6.00	$6.00	$6.00
	1kg Punnet	not indicated	Odd Bunch	$6.50 ↓	$6.50 ↓		
	Organic single						
	Organic 2 pack						
Single fruit average by city (all varieties, excluding organic)				$2.35 ↓	$2.00 ↓	$2.33 ↓	$2.60 ↓
Single fruit average (all varieties, excluding organic)			**$2.32 ↓**				

Catalogue offers on avocados:

Coles - all states - no catalogue offers

Woolworths - Brisbane - Australian Shepard $2.00 each

Woolworths - Sydney - Australian The Odd Bunch Avocados 1kg pack $6.50

Woolworths - Melbourne - Australian Shepard $2.00 each

Woolworths - Perth - Australian The Odd Bunch Avocados 1kg pack $7.50

Aldi - national - no catalogue offers

Foodworks - Sydney - Shepard $2.29 each

IGA - Sydney - Australian Shepard $2.50 each

IGA - Perth - Australian Shepard $2.49 each

Key:

*	~~offer was advertised as a weekly and/or catalogue special~~
↑ (green)	increase in price from previous week
(yellow)	same price as previous week
↓ (red)	decrease in price from previous week

Notes for graph on previous page:

Online retail pricing for Hass single fruit

11/04/18 (Week 15)
Coles single Hass price not available Bris, Syd & Perth
WW single Hass price not available all states

04/04/18 (Week 14)
Coles single Hass price not available Bris, Perth
WW single Hass price not available all states

21/03/18 to 03/04/2018 (Weeks 12 & 13)
Coles & WW single Hass price not available all states

14/03/18 (Week 11)
WW single Hass price not available all states
Coles single Hass price not available: Bris, Syd, Melb

07/03/18 (Week 10)
WW single Hass price not available for Bris & Syd
Coles single Hass price not avail. for Bris, Syd & Melb

28/02/18 (Week 9)
WW single Hass price not available for Bris & Syd
Coles single Hass price not available for Melbourne

21/02/18 (Week 8)
Woolworths single fruit price not available for Brisbane

14/02/18 (Week 7)
WW single Hass price not available for Brisbane

25/10/17 (Week 43)
Coles single Hass price not available for Brisbane

12/07/17 (Week 28)
WW single Hass price not available for Melbourne

10/05/17 (Week 19)
Coles data not available for all states
WW single Hass price not available for Perth

03/05/17 (Week 18)
WW single Hass price not available for Perth

26/04/17 (Week 17)
Coles single Hass price not available for all states
WW single Hass price only available for Melbourne

Avocados Australia research the online shopping and catalogue prices for avocados on Wednesdays when major supermarkets usually publish their weekly prices. Advertised weekly, prices are valid for seven days, Wednesday to Tuesday.

Hort Innovation Strategic levy investment | AVOCADO FUND

This project has been funded by Hort Innovation using the avocado research and development levy and funds from the Australian Government. For more information on the fund and strategic levy investment visit horticulture.com.au

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