Infocado weekly report

Week 22-2018 (26 May - 01 June 2018)

Hort Innovation
Strategic levy investment

AVOCADO FUND

[Conduct dry matter tests at home]

[What is Infocado?]

[Using and interpreting Infocado reports]

[Avocado supply chain education materials]

Weekly summary:

- **Remember to update your 4 week forecasts every week.**
- For quality assurance, please remind growers before picking to **ensure dry matter of at least 23% for Hass.**
- Total dispatch was 236,178 last week, less than forecast of 303,890. Again, the discrepancy is not localised, and may be a result of timing of fruit into the supply chain.
- CQ supplied the majority of fruit at 55%, followed by NQ at 38%. Sunshine Coast, South Qld , TNR and Tristate supplied the remaining 7% of fruit.
- The average online single avocado price for the reported week was $2.16 a slight decrease on the previous week—see p.6

Marketing update: good supplies for consumers

The new television ad for the avocado industry's latest marketing campaign has coincided with good supplies. Now is a great time to be a consumer, with plenty of quality fruit on the market. 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.

Upcoming public holidays affecting Infocado deadlines

Mon 11 June: Public holiday in ACT, NSW, Vic & SA - enter data by **11am Tues 12 June**, report 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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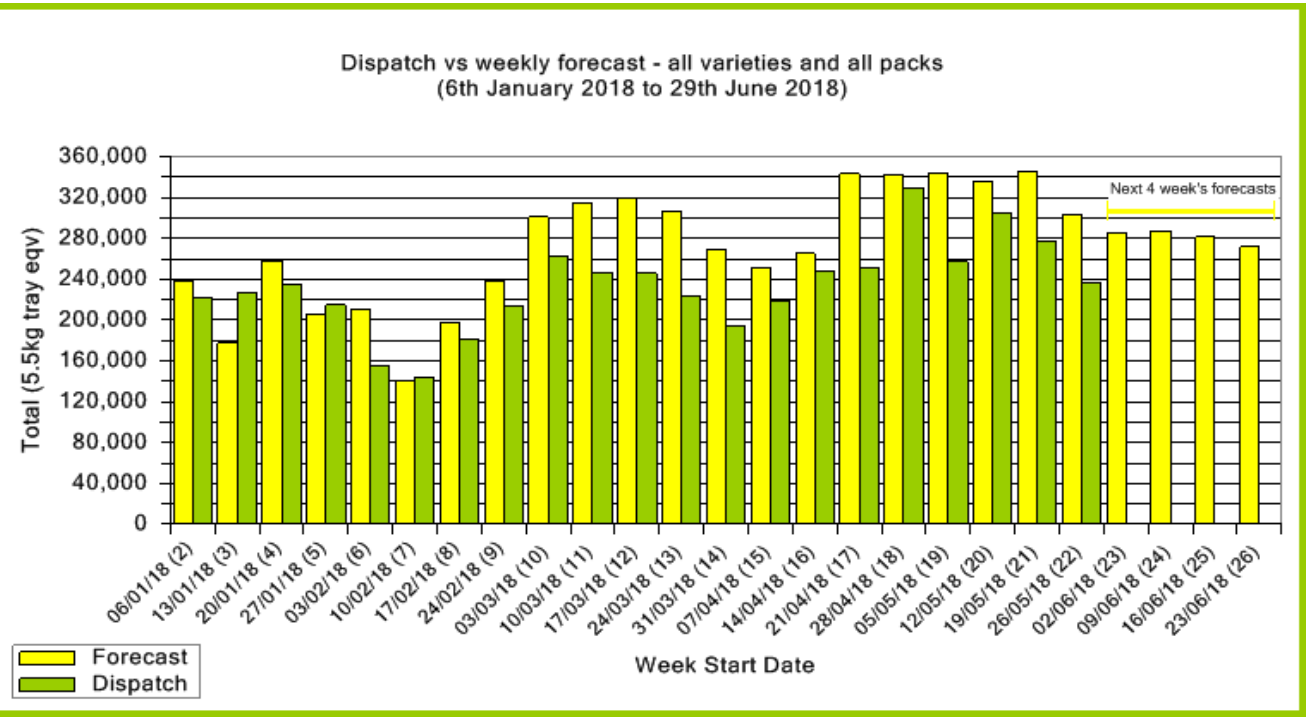
Yellow shading indicates forecast data

Forecast Data (Week 22 - 26)						
Variety	Trays - Total	Bulk	P/Pk	Oil	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 22 - begin 26/05/2018						
Hass	281,530	9,360	2,100		9,700	**300,694**
Sharwil	1,050	300				**1,595**
Shepard	500					**500**
Wurtz	1,100					**1,100**
Week Total	**284,180**	**9,660**	**2,100**		**9,700**	**303,890**
Week 23 - begin 02/06/2018						
Hass	264,700	8,622	2,100		10,700	**282,703**
Sharwil	500	100				**682**
Wurtz	2,050					**2,050**
Week Total	**267,250**	**8,722**	**2,100**		**10,700**	**285,435**
Week 24 - begin 09/06/2018						
Fuerte	40	8				**55**
Hass	266,550	9,130	1,100		9,400	**285,059**
Wurtz	2,000					**2,000**
Week Total	**268,590**	**9,138**	**1,100**		**9,400**	**287,114**
Week 25 - begin 16/06/2018						
Hass	260,800	9,430	600	100	8,500	**279,617**
Wurtz	2,000					**2,000**
Week Total	**262,800**	**9,430**	**600**	**100**	**8,500**	**281,617**
Week 26 - begin 23/06/2018						
Hass	250,700	9,440	600	100	8,500	**269,536**
Wurtz	2,000					**2,000**
Week Total	**252,700**	**9,440**	**600**	**100**	**8,500**	**271,536**

Green shading indicates dispatch data

Dispatch Data (Week 22 - begin 26/05/2018)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Fuerte	147	20			**183**
Hass	200,139	16,716	600	5,628	**231,664**
Sharwil	1,355	259			**1,826**
Wurtz	1,120	762			**2,505**
Total	**202,761**	**17,757**	**600**	**5,628**	**236,178**



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	0	**2,059,911**
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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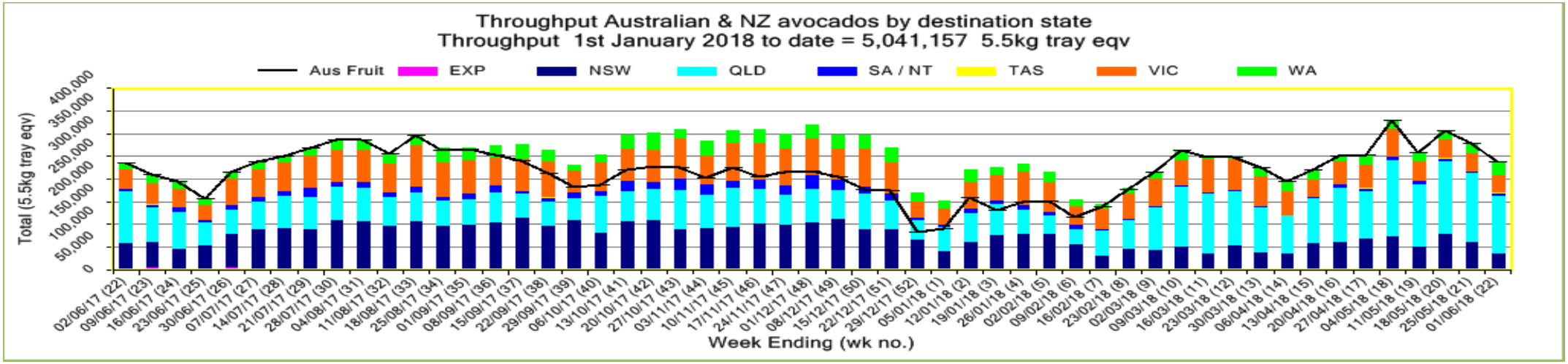
Origin of dispatched avocados

Industry Dispatches By Origin Region and Count Size : 26th May - 1st June 2018 (Wk 22)														
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 Qld	298	8,297	17,012	30,581		24,224	17,887	8,619	2,806	**109,724**	10,084		5,193	**129,003**
North Qld	1,388	24,895	9,630	25,544	1,138	10,307	4,193	2,095	1,375	**80,565**	5,241		435	**90,173**
South Qld	154	70	48	323		297	299	291	287	**1,769**	241			**2,207**
Sunshine Coast	127	553	1,438	1,913		2,174	2,522	1,521	113	**10,361**	2,151			**14,272**
Tamborine/Northern Rivers				35		60	47	53		**195**	20	600		**340**
Tri State		1	10	29		31	42	15	19	**147**	20			**183**
	1,967	**33,816**	**28,138**	**58,425**	**1,138**	**37,093**	**24,990**	**12,594**	**4,600**	**202,761**	**17,757**	**600**	**5,628**	**236,178**

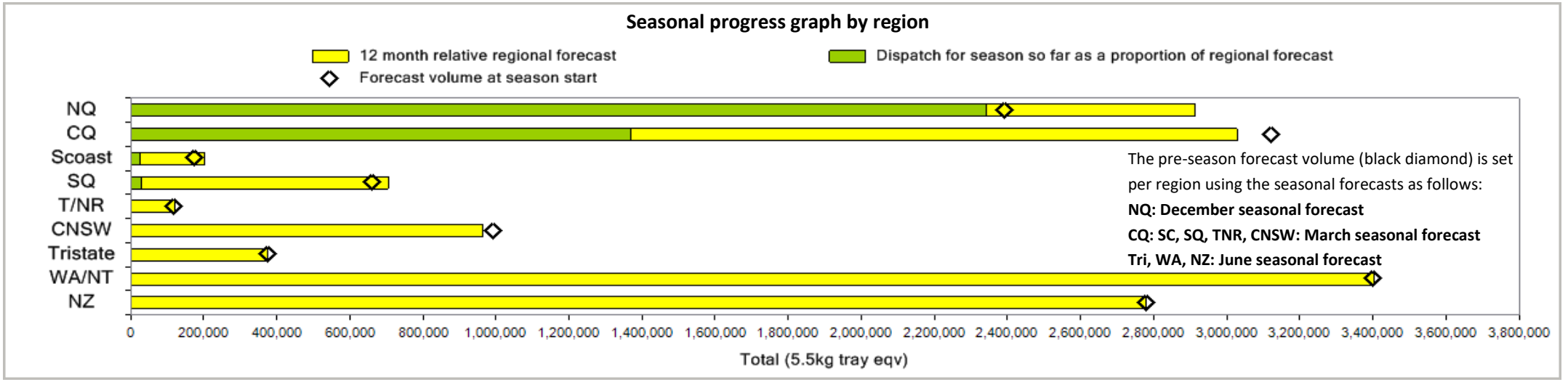
Note: NZ dispatch volumes by Count Size are estimated based on the Count Size distribution of NZ exports to all markets; and NZ dispatch volumes are reported in the week the volumes are expected to arrive in Australia, this is usually approximately one week after being shipped.

Destination of dispatched avocados

Industry Dispatches By Destination State and Count Size : 26th May - 1st June 2018 (Wk 22)														
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								387	113	**500**	192			**849**
NSW	6	14,902	2,417	4,122		1,635	2,222	310	1,760	**27,374**	3,573	600		**33,979**
QLD	1,837	15,251	16,239	33,021		19,466	12,588	5,372	2,020	**105,794**	12,125		5,628	**128,862**
SA / NT		1	34	1,286		481	2,036	370	19	**4,227**	666			**5,438**
TAS								160		**160**				**160**
VIC	90	3,056	9,008	16,996	1,138	4,397	1,156	1,029	654	**37,524**	1,030			**39,397**
WA	34	606	440	3,000		11,114	6,988	4,966	34	**27,182**	171			**27,493**
Total	**1,967**	**33,816**	**28,138**	**58,425**	**1,138**	**37,093**	**24,990**	**12,594**	**4,600**	**202,761**	**17,757**	**600**	**5,628**	**236,178**



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 22-2018 Contributors - Packhouses

Costa Avocados (Consolidator)
Green Skin Avocados (Consolidator)
MacKays Marketing (Consolidator)
Natures Fruit Company (Consolidator)
Rockridge Fresh (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Sunfresh (Consolidator)
Costa Avocados/SuperPak (CQ)
Donovan Family Investment Trust (CQ)
Lava Valley Produce (CQ)
Simpson Farms Pty Ltd (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Sunnyspot Packhouse Pty Ltd (CQ)
Costa Avocados/Avocado Estates (NQ)
Golden Triangle Avocados (NQ)
Rockridge Farming Pty Ltd (NQ)
Balmoral Orchard (SQ)
G & J Krenske (SQ)
Googa Farms (SQ)
Touchwood Farming (SQ)

Week 22-2018 Contributors - Wholesalers

Costa Farms [Adelaide]
Costa Farms [Brisbane]
Costa Farms [Melbourne]
De Luca Banana Marketing Pty Ltd [Brisbane]
Etherington [Perth]
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]

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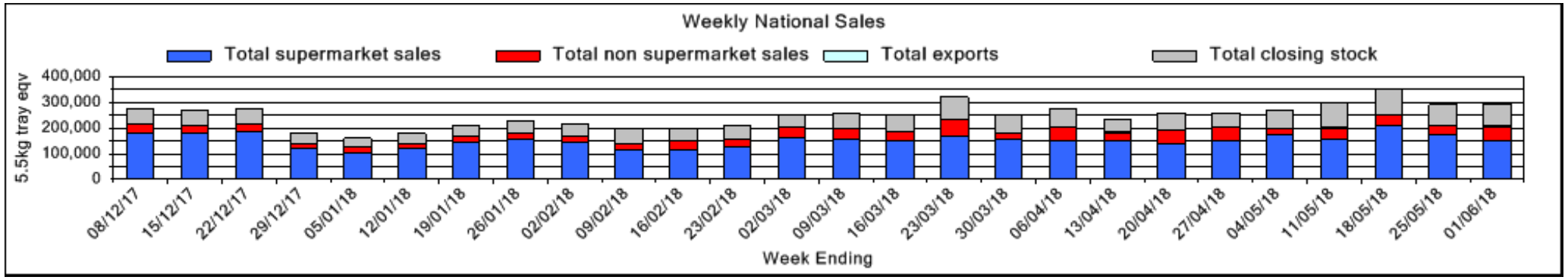
Sales Report including Direct Sales from Packhouses, Wholesale Sales and Stock on Hand at Wholesale Level

	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shep-ard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	16,317			16,317	20			20	36	600			600	109	16,462			16,462
Total non supermarket sales	1,313			1,313	444			444	807						2,120			2,120
Total exports																		
Total sales	17,630			17,630	464			464	844	600			600	109	18,583			18,583
Total Stock on Hand	1,252			1,252											1,252			1,252
QLD																		
Total supermarket sales	56,046	488		56,534	4,336			4,336	7,884						63,930	488		64,418
Total non supermarket sales	15,154	244	136	15,534	869			869	1,580						16,734	244	136	17,114
Total exports	500			500	192			192	349						849			849
Total sales	71,700	732	136	72,568	5,397			5,397	9,813						81,513	732	136	82,381
Total Stock on Hand	38,089	140	24	38,253	545	3		548	996						39,080	145	24	39,249
SA & TAS																		
Total supermarket sales	11,010			11,010	96			96	175						11,185			11,185
Total non supermarket sales	2,906			2,906	696			696	1,265						4,171			4,171
Total exports																		
Total sales	13,916			13,916	792			792	1,440						15,356			15,356
Total Stock on Hand	16,216			16,216	1,057			1,057	1,922						18,138			18,138
VIC																		
Total supermarket sales	33,343			33,343	192			192	349						33,692			33,692
Total non supermarket sales	21,966	318	2,059	24,343	700			700	1,273						23,239	318	2,059	25,616
Total exports																		
Total sales	55,309	318	2,059	57,686	892			892	1,622						56,931	318	2,059	59,308
Total Stock on Hand	18,464		916	19,380	1,554			1,554	2,825						21,289		916	22,205
WA																		
Total supermarket sales																		
Total non supermarket sales	Full data set not displayed because less than three wholesalers from this state contributed data this week																	
Total exports																		
Total sales	29,805			29,805	1,150			1,150	2,091						31,896			31,896
Total Stock on Hand																		
Total																		
Total supermarket sales	140,582	488		141,070	4,648			4,648	8,451	600			600	109	149,142	488		149,630
Total non supermarket sales	47,278	562	2,195	50,035	3,855			3,855	7,009						54,287	562	2,195	57,044
Total exports	500			500	192			192	349						849			849
Total sales	188,360	1,050	2,195	191,605	8,695			8,695	15,809	600			600	109	204,278	1,050	2,195	207,523
Total Stock on Hand	79,582	140	940	80,662	4,058	3		4,061	7,384						86,960	145	940	88,046



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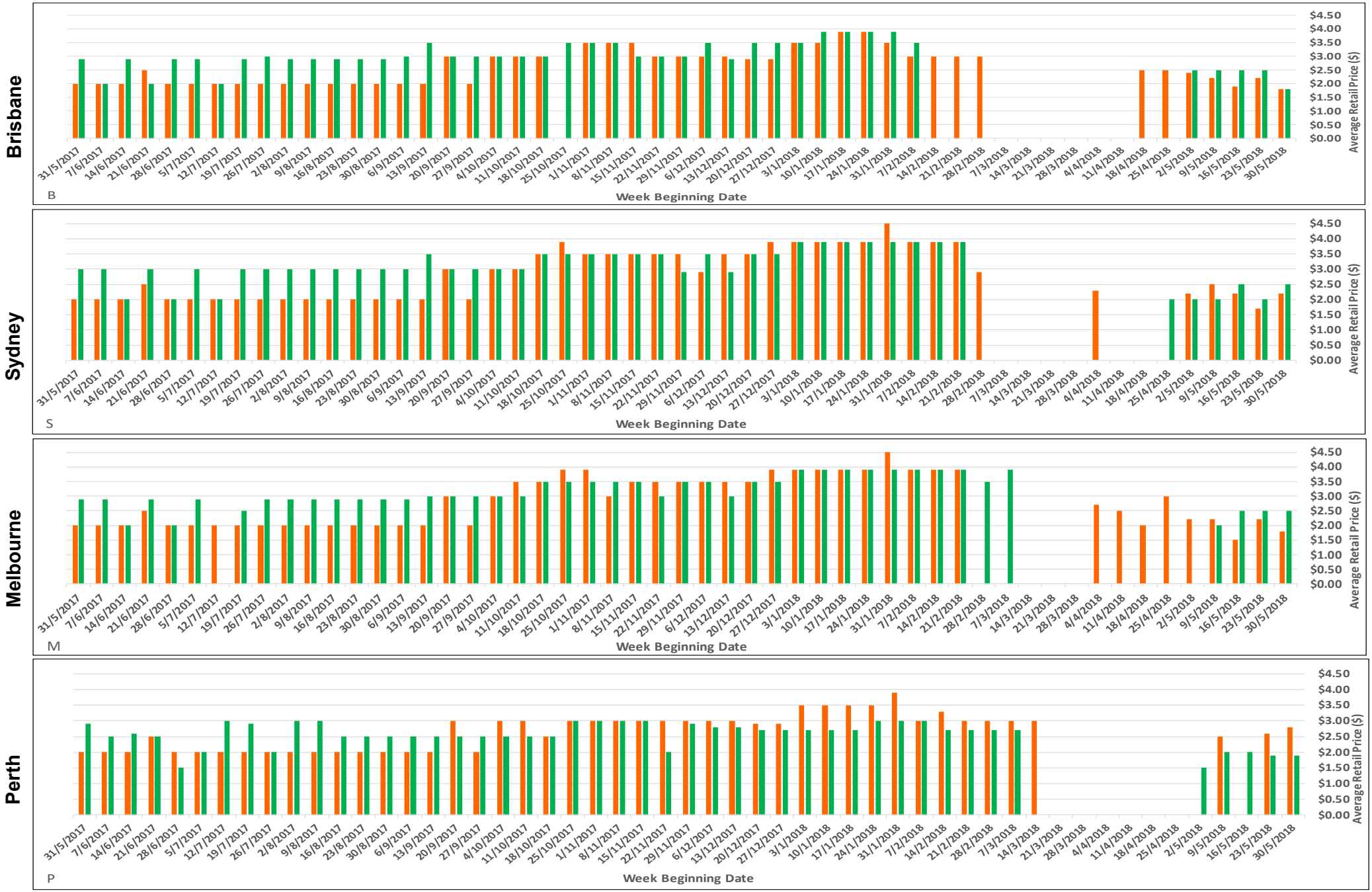
Avocados Australia online retail pricing report **Reporting period: Week 22-2018 Wed 30/05/18 – Tue 05/06/18**

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 22-2018 (Wed 30/05/18 - Tue 05/06/18)

	Pack Type	Variety	Description	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass		$1.80 ↓*	$2.20 ↑*	$1.80 ↓*	$2.80 ↑
	Multi-buy	Hass		3 for $5 *	2 for $4 *	3 for $5 *	2 for $5 *
	880g Pack	not indicated		$5.90		$4.00	
	3 pack						
	Organic single						
	Organic 2 pack						
Woolworths	Single fruit	Hass		$1.80 ↓*	$2.50 ↑	$2.50	$1.90
	Single fruit	Shepard					
	Multi-buy	Hass		2 for $4 *	2 for $4 *	2 for $4 *	
	3 pack	not indicated	Australian	$4.50	$4.50		$6.00
	1kg Punnet	not indicated	Odd Bunch	$7.00	$7.00	$7.00	$7.50 ↓
	Organic single						
	Organic 2 pack						
Single fruit average by city (all varieties, excluding organic)				$1.80 ↓	$2.35 ↑	$2.15 ↓	$2.35 ↑
Single fruit average (all varieties, excluding organic)			**$2.16 ↓**				

Catalogue offers on avocados:

Coles: no catalogue offers, but advertised "Fresh Specials" in each state as per multi-buys listed above

Woolworths: Brisbane - Aust. Hass 2 for $4, or $2.50 each (despite $1.80 single price online)

Woolworths: all states advertising Meal "Bundles": in total 6 meal options available, all with 1 Hass avo included in bundle. Full bundles prices from $16.50 - $20.

Aldi: national - Aust. Hass $1.29 each, and recipe promotion for "Streaky Bacon, Feta Cheese & Avocado Salad"

Foodworks: Sydney -Hass avocados 2 for $3

IGA: Perth - no catalogue offers

Key:

*	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

16/05/18 (Week 20)
Coles single Hass price not available Perth

02/05/18 (Week 18)
Coles single Hass price not available Perth
WW single Hass price not available Melb

25/04/18 (Week 17)
Coles single Hass price not available Syd & Perth
WW single Hass price not available Bris, Melb & Perth

18/04/18 (Week 16)
Coles single Hass price not available Syd & Perth
WW single Hass price not available all states

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

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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