Infocado weekly report

Week 38 - 2019 (14 - 20 September 2019)

Comments:

WA packers: please start entering your 4week forecasts if your season is about to start in September & October. For quality assurance, please remind growers before picking to **ensure dry matter of at least 23% for Hass.**

Week 38 - 2019 summary:

- Total dispatch was 342,192 trays, a 14% increase on the previous week (299,122 trays), and 4% lower than the forecasted 356,957 trays.
- Western Australia supplied the majority of fruit at 52%, followed by New Zealand at 19%, Central NSW at 14%, Tri State at 8% and South Qld at 4%. The remaining 3% of fruit was supplied by Tamborine/Northern Rivers, and Sunshine Coast.
- The average online single avocado price for the reported week is $2.22, a 18¢ increase on the previous week —see pp.6 & 7.

Marketing Update: Catch up TV and avocados

Did you know the average Australian home now has 6.6 connected screens? Australian Avocados is taking advantage of this to target our consumers as they watch catch-up TV and YouTube. All the way through until the end of December, the fact that avocados make everything better will be showcased on catch-up TV channels including 7, 9, Ten, SBS and Foxtel, while on YouTube the content will appear across lifestyle and food content viewed by key avocado shoppers (women). This marketing activity is managed by Hort Innovation and funded by the avocado marketing levy. #smashanavo

Upcoming holidays which impact data due dates

Monday 30 September: Queen's Birthday (WA) - enter data by 11am Tuesday 01 October, report will be distributed on Wednesday instead of Tuesday.

Report Index p.2: 4week forecast; import data | p.3: dispatches | p.4: dispatches by region; contributors | p.5: wholesale data | pp.6 & 7: retail prices

Conduct dry matter tests at home

What is Infocado?

Using and interpreting Infocado reports

Avocado supply chain education materials

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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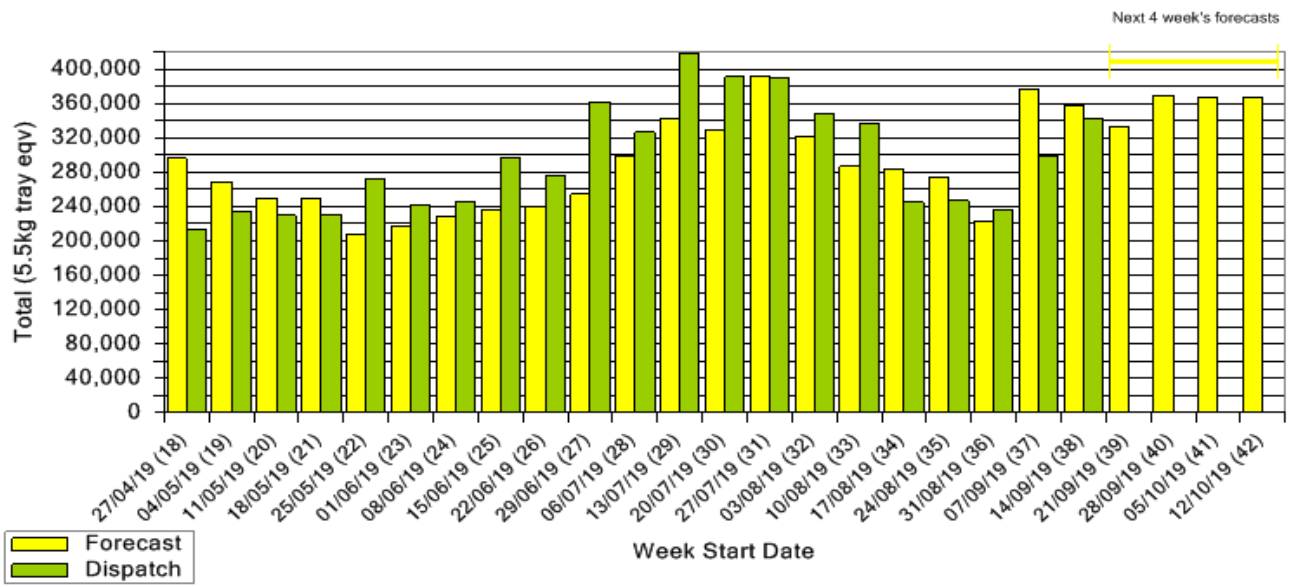
Yellow shading indicates forecast data

Forecast Data (Week 38 - 42)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 38 - begin 14/09/2019					
Hass	302,557	27,435	600	20,000	**356,184**
Lamb Hass	500	150			**773**
Week Total	**303,057**	**27,585**	**600**	**20,000**	**356,957**
Week 39 - begin 21/09/2019					
Hass	287,362	23,420	600	20,000	**333,689**
Week Total	**287,362**	**23,420**	**600**	**20,000**	**333,689**
Week 40 - begin 28/09/2019					
Hass	328,882	20,780	600	15,000	**369,500**
Week Total	**328,882**	**20,780**	**600**	**15,000**	**369,500**
Week 41 - begin 05/10/2019					
Hass	338,457	15,365	600	5,000	**367,411**
Week Total	**338,457**	**15,365**	**600**	**5,000**	**367,411**
Week 42 - begin 12/10/2019					
Hass	337,901	15,838	600	5,000	**367,715**
Week Total	**337,901**	**15,838**	**600**	**5,000**	**367,715**

Green shading indicates dispatch data

Dispatch Data (Week 38 - begin 14/09/2019)				
Variety	Trays	Bulk	P/PK	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Total Trays
Fuerte	320	200		**684**
Hass	267,558	40,613	600	**341,509**
Total	**267,878**	**40,813**	**600**	**342,192**



New Zealand avocado exports: forecast v dispatch (5.5kg eqv trays) August 2019 - Feb 2020

NZ export to Australia	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan 2020	Feb 2020	Total
Pre-Season Forecast [1] at 27/06/2019	31,760	323,951	425,236	507,708	618,017	431,332	139,261	**2,477,265**
Updated Season Forecast [1] at 18/09/19	31,760	323,951	476,916	484,043	662,653	486,876	233,117	**N/A - these forecasts are updated monthly**
Dispatch volume Infocado [1]	34,162	188,279						**222,441**
Customs Data of NZ avocado exports [2]								

[1] Source: Infocado [2] Source: GTIS - Global Trade Atlas [3] Source: StatsNZ Infoshare **red text =** Data not yet complete for the month / season

Yellow cell = Forecast can still be updated

Grey cell = Forecast is set and can no longer be updated

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Origin of dispatched avocados

Industry Dispatches By Origin Region and Count Size : 14th September - 20th September 2019 (Wk 38)													
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**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Total**
Central NSW		814	1,233	8,021		8,728	7,552	7,404	3,308	**37,060**	5,475		**47,015**
New Zealand		3,332	6,023	12,941		11,275	14,735	7,561	8,201	**64,068**			**64,068**
South Qld	4	23	204	628	192	2,193	2,514	2,824	876	**9,458**	2,768		**14,491**
Sunshine Coast		32	96	368		557	582	394		**2,029**	1,318		**4,425**
Tamborine/ Northern Rivers		2	35	344	375	367	846	1,139	485	**3,593**	1,019	600	**5,555**
Tri State	80	427	1,101	2,872	1,500	4,301	3,715	9,573	783	**24,352**	1,987		**27,965**
WA/NT	100	1,957	6,952	28,832		35,629	33,207	14,704	5,937	**127,318**	28,246		**178,674**
	184	**6,587**	**15,644**	**54,006**	**2,067**	**63,050**	**63,151**	**43,599**	**19,590**	**267,878**	**40,813**	**600**	**342,192**

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 : 14th September - 20th September 2019 (Wk 38)													
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**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Total**
EXP			80				28	652	3,690	**4,450**	6,461		**16,197**
NSW	98	2,086	4,438	20,410	204	22,515	22,640	11,264	6,969	**90,624**	14,903	600	**117,829**
QLD		2,572	5,077	11,133	1,756	11,929	13,682	16,745	5,464	**68,358**	10,290		**87,067**
SA / NT			169	242		1,347	1,863	1,343	110	**5,074**	993		**6,879**
VIC	46	1,352	4,225	17,250	107	21,230	20,054	7,534	1,619	**73,417**	5,187		**82,848**
WA	40	577	1,655	4,971		6,029	4,884	6,061	1,738	**25,955**	2,979		**31,371**
Total	**184**	**6,587**	**15,644**	**54,006**	**2,067**	**63,050**	**63,151**	**43,599**	**19,590**	**267,878**	**40,813**	**600**	**342,192**

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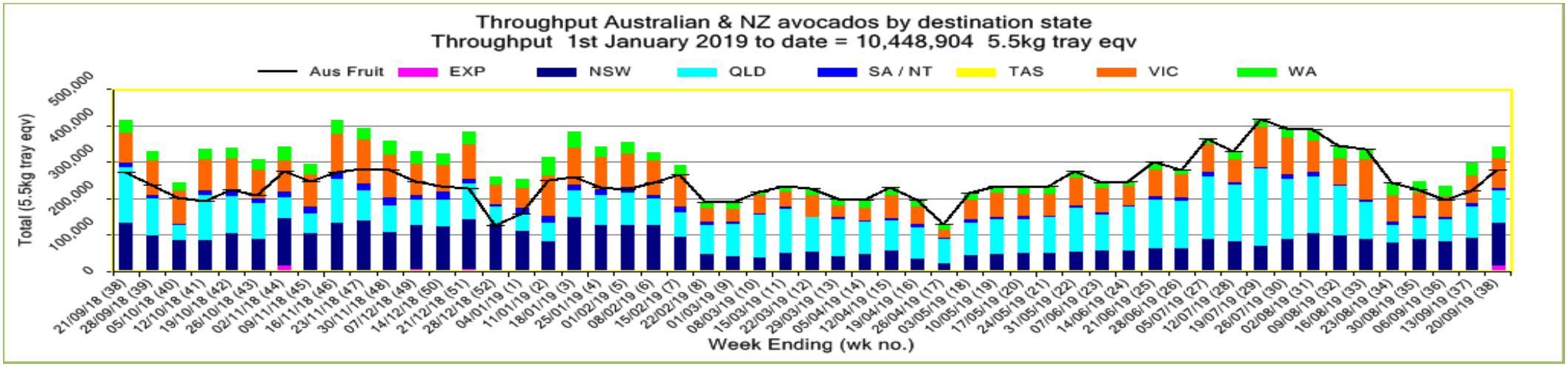
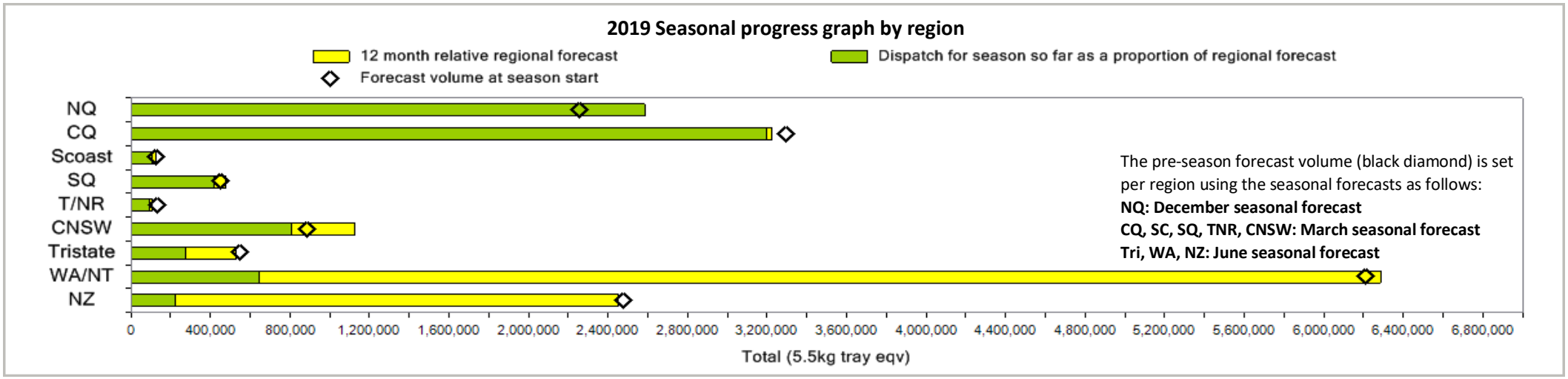


The **seasonal progress graph** below uses seasonal forecast data from direct contributors, it does not consider extrapolated figures that compensate for non-contributing packhouses, thus these figures may be lower than those shown on the seasonal (quarterly) report. The total of each bar in the graph below is a result of total monthly dispatches to date plus the remaining seasonal forecast which can be updated monthly.



Week 38 - 2019 Contributors - Packhouses

Costa Avocado (Consolidator)
Natures Fruit Company (Consolidator)
NZ Avocado Ltd
Avorama Pty Ltd (CNSW)
Costa Avocado/Coastal Avocados (CNSW)
Midcoast Avocados (CNSW)
Balmoral Orchard (SQ)
Green Nugget Orchards (SQ)
Wodonga Park Fruit and Nuts (SQ)
Aussie Orchards Growers & Packers (TNR)
Jirel Holdings (TNR)
Merrinee Farm (TNR)
T W Silver (TNR)
Zhong Sheng Pty Ltd (TNR)
Barham Avocados (TRI)
Chinoola Orchards (TRI)
Golden Hill Packing Pty Ltd (TRI)
J.G. Loffler (TRI)
KV & JM Lehmann (TRI)
Sunvale Produce Pty Ltd (TRI)
Advance Packing & Marketing Services P/L (WA)
Applewood Orchard (WA)
Avonova (WA)
Avowest (WA)
Delroy Orchards (WA)
Joe Bendotti & Co (WA)
R & S Bamess (WA)
The Avocado Grove (WA)

Week 38 - 2019 Contributors - Wholesalers

Costa Farms [Adelaide]
Costa Farms [Brisbane]
Costa Farms [Melbourne]
Etherington [Perth]
Exotic Fruit Traders [Sydney]
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]
N & A Fruit Distributors Pty Ltd [Sydney]
Nutrano Produce Group [Brisbane]
Sinclair & Antico (Aust) Pty Ltd [Sydney]
United Fresh [Adelaide]
VB Sculli [Melbourne]
WA Farm Direct [Perth]

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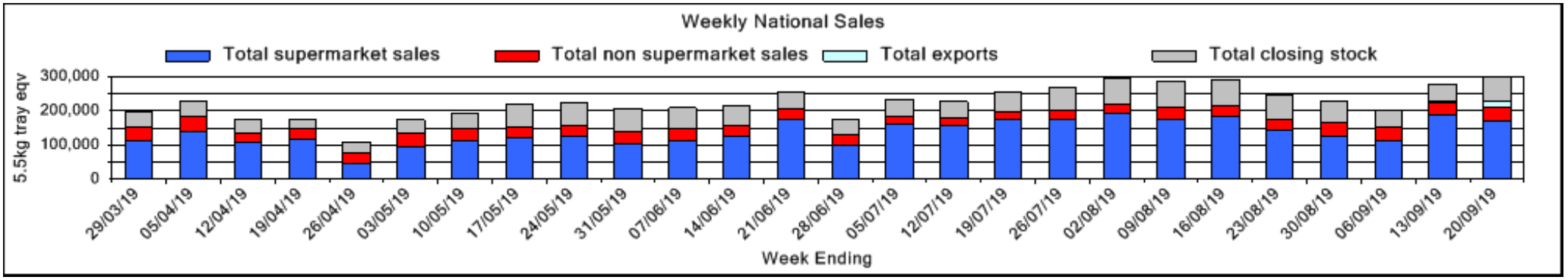
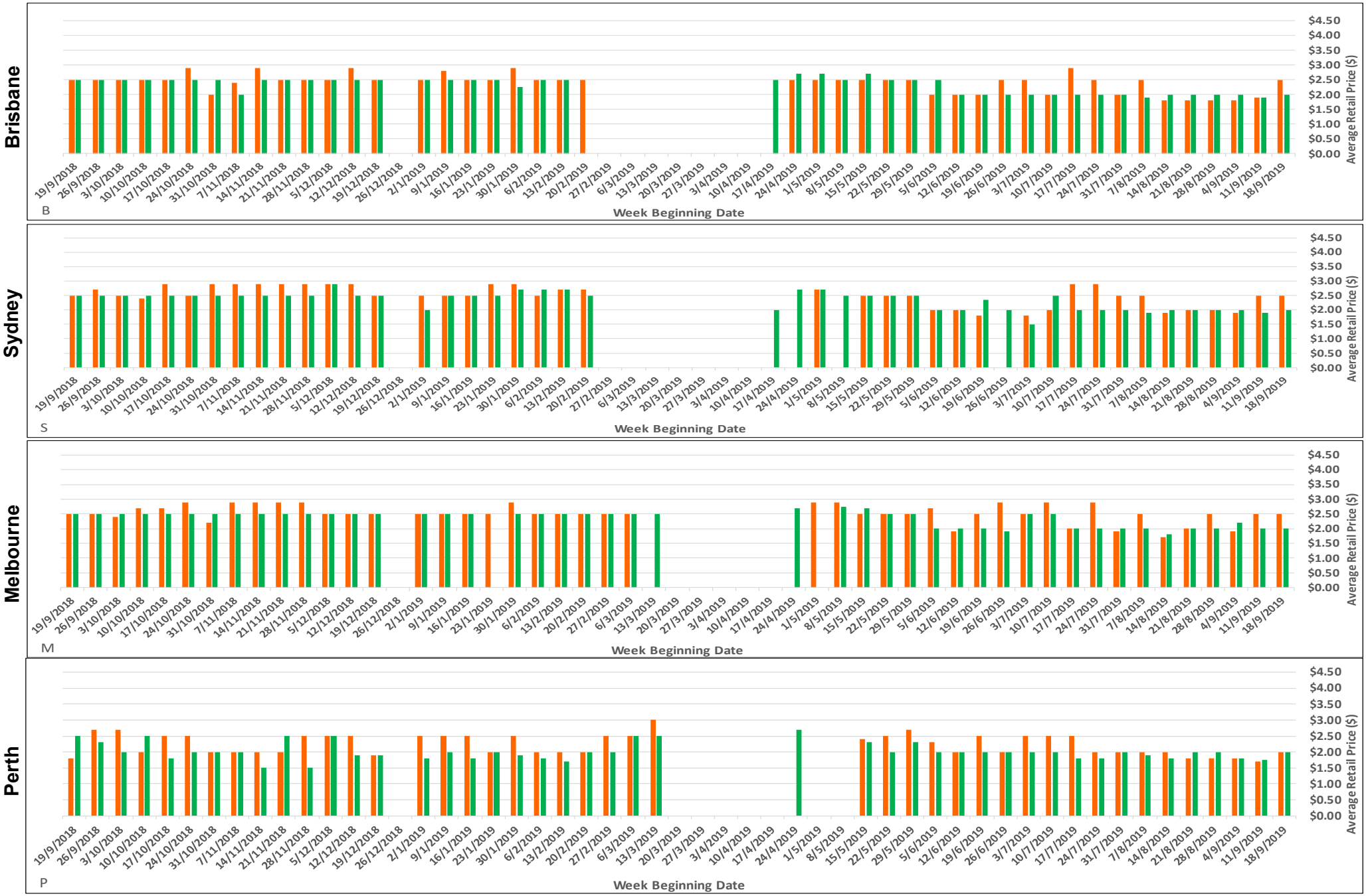
Sales report including direct sales from packhouses, wholesale sales and stock on hand at wholesale level

	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	62,832			62,832	1,138			1,138	2,069	600			600	109	65,010			65,010
Total non supermarket sales	3,268			3,268	698			698	1,269						4,537			4,537
Total exports																		
Total sales	66,100			66,100	1,836			1,836	3,338	600			600	109	69,547			69,547
Total Stock on Hand	769			769	652			652	1,185						1,954			1,954
QLD																		
Total supermarket sales	37,597			37,597											37,597			37,597
Total non supermarket sales	2,123			2,123	250			250	455						2,578			2,578
Total exports																		
Total sales	39,720			39,720	250			250	455						40,175			40,175
Total Stock on Hand	28,643			28,643	196			196	356						28,999			28,999
SA & TAS																		
Total supermarket sales	3,022			3,022											3,022			3,022
Total non supermarket sales	3,481			3,481	1,507			1,507	2,740						6,221			6,221
Total exports	400			400											400			400
Total sales	6,903			6,903	1,507			1,507	2,740						9,643			9,643
Total Stock on Hand	8,379			8,379	1,022			1,022	1,858						10,237			10,237
VIC																		
Total supermarket sales	51,092			51,092	2,398			2,398	4,360						55,452			55,452
Total non supermarket sales	9,871		861	10,732	2,252		570	2,822	5,131						13,966		1,897	15,863
Total exports																		
Total sales	60,963		861	61,824	4,650		570	5,220	9,491						69,418		1,897	71,315
Total Stock on Hand	17,739		1,482	19,221	738			738	1,342						19,081		1,482	20,563
WA																		
Total supermarket sales	8,928			8,928	1,639			1,639	2,980	216			216	39	11,947			11,947
Total non supermarket sales	6,429			6,429	1,393			1,393	2,533						8,962			8,962
Total exports	4,050			4,050	6,461			6,461	11,747						15,797			15,797
Total sales	19,407			19,407	9,493			9,493	17,260	216			216	39	36,706			36,706
Total Stock on Hand	8,576			8,576	75			75	136						8,712			8,712
Total																		
Total supermarket sales	163,471			163,471	5,175			5,175	9,409	816			816	148	173,028			173,028
Total non supermarket sales	25,172		861	26,033	6,100		570	6,670	12,127						36,263		1,897	38,160
Total exports	4,450			4,450	6,461			6,461	11,747						16,197			16,197
Total sales	193,093		861	193,954	17,736		570	18,306	33,284	816			816	148	225,489		1,897	227,386
Total Stock on Hand	64,106		1,482	65,588	2,683			2,683	4,878						68,984		1,482	70,466



Avocados Australia online retail pricing report **Reporting period: week 38-2019 (Wed 18/09/19 – Tue 24/09/19)**

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



Avocado online retail pricing for Coles and Woolworths

Reporting period: week 38-2019 (Wed 18/09/19 - Tue 24/09/19)

	Pack Type	Variety	Description	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass		$2.50 ↑	$2.50	$2.50 *	$2.00 ↑
	Multi-buy	Hass		2 for $4 *	2 for $4 *		2 for $4 *
	Single fruit	Reed		$1.70	$2.70	$2.50	
	5 pack	not indicated		$6.00 ↑	$5.90	$4.90	$6.50 ↑
	Organic Single fruit	not indicated			$6.00		
	Organic 2 pack	not indicated					
Woolworths	Single fruit	Hass	Mixed Origin (Bris, Syd & Melb)	$2.00 ↑*	$2.00 ↑*	$2.00 *	$2.00 ↑
	Multi-buy	Hass					
	3 pack	not indicated		$5.00	$5.00	$5.00	
	1kg Punnet	not indicated	Odd Bunch		$6.00 ↑	$6.00 ↑	$6.00 ↓
	Organic Single fruit	not indicated			$4.50		
	Bundle of 20	Hass		$36.10	$36.10	$36.10	$36.10
Single fruit average by city (all varieties, excluding organic)				$2.07 ↑	$2.40 ↑	$2.33	$2.00 ↑
Single fruit average (all varieties, excluding organic)			$2.22 ↑				

Catalogue offers on avocados:

Coles - National: No catalogue offers

Woolworths - National: No catalogue offers

Aldi - National: No catalogue offers

Foodworks - Sydney: Australian Hass $1.99 each

IGA - Brisbane: Australian Hass 2 for $3.50

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 graphs on previous page:
Online retail pricing for Hass & Shepard single fruit

17/07/19 - 18/09/19 (Week 29 - Week 38)
Coles single Shepard price not available in all states
WW single Shepard price not available in all states

10/07/19 (Week 28)
Coles single Shepard price not available in all states
WW single Shepard price not available in all states

03/07/19 (Week 27)
Coles single Shepard price not available in all states
WW single Shepard price not available in all states

26/06/19 (Week 26)
Coles single Hass price not available in Sydney
Coles single Shepard price available in Sydney only
WW single Shepard price not available in all states

19/06/19 (Week 25)
Coles single Shepard price not available in all states
WW single Shepard price not available in all states

12/06/19 (Week 24)
Coles single Shepard price not available in all states
WW single Shepard price not available in all states

05/06/19 (Week 23)
Coles single Shepard price available in Melb only
WW single Shepard price not available in all states

29/05/19 (Week 22)
Coles single Shepard price available in Syd & Melb
WW single Shepard price not available in all states

22/05/19 (Week 21)
Coles single Shepard price available in Melbourne only
WW single Shepard price not available in all states

15/05/19 (Week 20)
Coles single Shepard price not available for Bris & Perth
WW single Shepard price not available in all states

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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