Infocado weekly report

Week 19 - 2020 (02 - 08 May 2020)

Conduct dry matter tests at home

What is Infocado?

Using and interpreting Infocado reports

Avocado supply chain education materials

From the CEO, John Tyas:

All indications are that the market is working effectively, so keep the communication going with your supply chain partners and make sure your weekly forecasts are as accurate as possible. Demand tends to soften when we have a sudden cool change like we are having now. Hass is dominating the market now with small Shepard volumes to be dispatched over the next few weeks and we will see the marketing program align with this. In terms of other issues related to COVID-19, we will continue to provide updates on the AAL website https://www.avocado.org.au/public-articles/covid-19-national-resources/ and more detail on the members section https://www.avocado.org.au/member-articles/covid-19-daily-update/

Week 19 - 2020 summary:

- Central NSW, TNR, South, Central & North Queensland Packers: please start entering your 4week forecasts if your season is about to start in May & June. For quality assurance, please remind growers before picking to ensure dry matter of at least 23% for Hass & 21% for Shepard.
- Total dispatch was 238,204 trays, a decrease of 25% on the previous week (317,295 trays) and 20% lower than the forecasted 298,582 trays.
- North Qld supplied the majority of fruit at 63%, followed by Central Qld at 34%. Sunshine Coast, South Qld & Central NSW supplied 3%.
- Note New Zealand's 2020 updated forecast: at the time of the preparation of April's Quarterly Infocado report, New Zealand's estimation for the 2020 season was in the process of being revised. NZ has now updated the forecast for the 2020 season forecasting about 3.2 million trays, as reflected in the seasonal Progress Chart (P.4).

Marketing Update: Smash An Avo At Home

Alongside the grower videos being shared via Facebook and Instagram, Australian Avocados has also reached out to influencers to share their favourite way to #smashanavoathome. The posts to date (examples here, here, here and here) have received more than 348,000 opportunities to see and their fans seemed to love the content, with all posts being met with a lot of positive engagement. Australian Avocados is planning a second round of this activity. The industry's marketing activity is helping Aussie consumers connect with (and eat!) Australian avocados. This marketing activity is managed by Hort Innovation and funded by the avocado marketing levy.

Upcoming public holidays: Mon 01 June - Public holidays in NZ & WA: enter data by 11am Tue 02nd June, report will be distributed on Wed. Mon 08 June - Queen's Birthday National except QLD & WA: enter data by 11am Tue 09 June, report will be distributed on Wed instead of Tue. Mon 28 September - Queen's Birthday in WA: enter data by 11am Tue 29 September, report will be distributed on Wed instead of Tue.

Report Index: p.2: 4week forecast; import data | p.3: dispatches | p.4: dispatches by region; contributors | p.5: wholesale data | p.6-8 retail pricing report

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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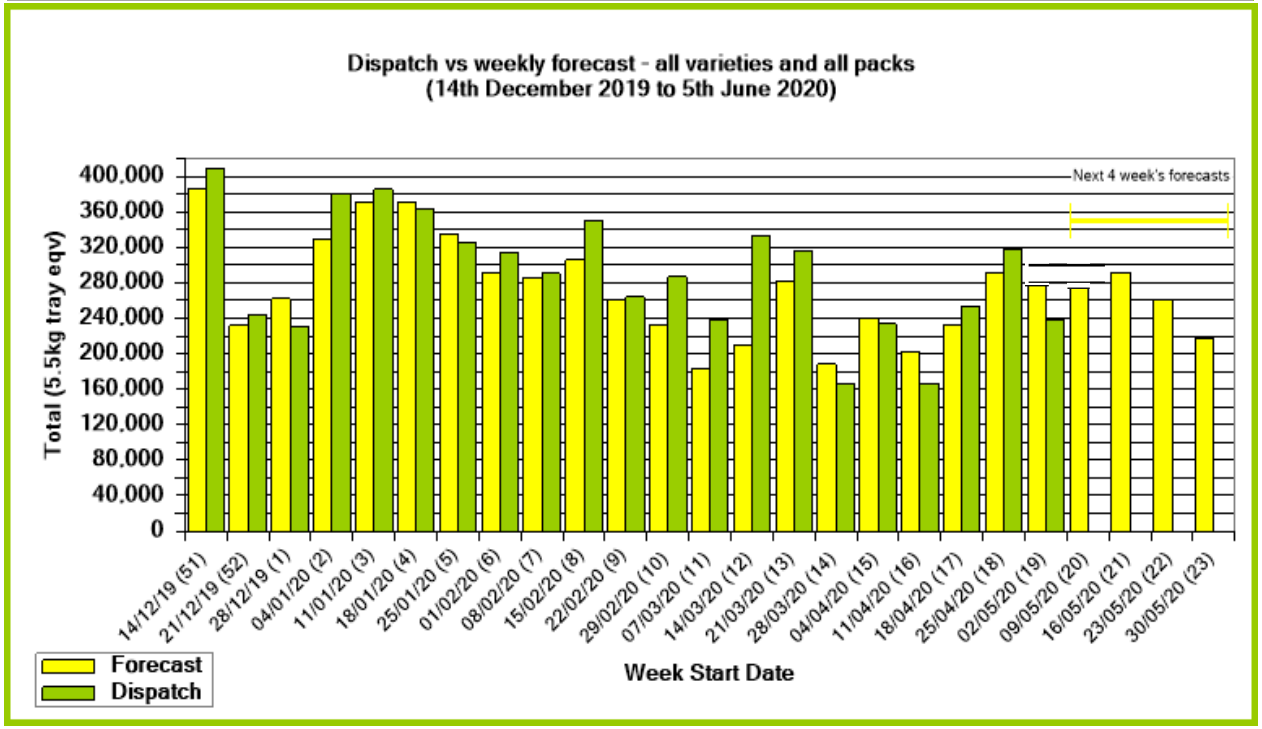
Yellow shading indicates forecast data

Forecast Data (Week 19 - 23)						
Variety	Trays - Total	Bulk	P/Pk	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 19 - begin 02/05/2020						
Hass	231,136	11,000	15,850	25,000	5,000	**259,472**
Pinkerton	300	30				**355**
Sharwil	1,100	350				**1,736**
Shepard	33,037	1,400		300		**35,637**
Wurtz	1,200	100				**1,382**
Week Total	**266,773**	**12,880**	**15,850**	**25,300**	**5,000**	**298,582**
Week 20 - begin 09/05/2020						
Hass	238,038	11,750	15,850	25,200	5,000	**267,775**
Sharwil	1,100	350				**1,736**
Shepard	23,677	850				**25,222**
Week Total	**262,815**	**12,950**	**15,850**	**25,200**	**5,000**	**294,733**
Week 21 - begin 16/05/2020						
Hass	242,708	10,670	15,850	24,200	5,000	**270,299**
Pinkerton	300	30				**355**
Sharwil	1,100	350				**1,736**
Shepard	19,277	50				**19,368**
Week Total	**263,385**	**11,100**	**15,850**	**24,200**	**5,000**	**291,758**
Week 22 - begin 23/05/2020						
Hass	217,658	9,650	10,200	15,900	2,500	**240,404**
Pinkerton	300	30				**355**
Sharwil	600	150				**873**
Shepard	19,277	50				**19,368**
Week Total	**237,835**	**9,880**	**10,200**	**15,900**	**2,500**	**261,000**
Week 23 - begin 30/05/2020						
Hass	195,642	8,080		4,500		**211,151**
Shepard	6,160	40				**6,233**
Week Total	**201,802**	**8,120**		**4,500**		**217,384**

Green shading indicates dispatch data

Dispatch Data (Week 19 - begin 2/05/2020)						
Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Fuerte	293					**293**
Gwen	491					**491**
Hass	166,323	12,021	8,064	1,211	6,000	**190,956**
Other	18,157					**18,157**
Pinkerton	515	429				**1,295**
Sharwil	352	14				**377**
Shepard	20,749	1,150	17,113			**25,951**
Wurtz	631	28				**682**
Total	**207,511**	**13,642**	**25,177**	**1,211**	**6,000**	**238,204**



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 18/12/19	31,760	323,951	476,916	484,043	701,860	487,704	272,963	**N/A - these forecasts are updated monthly**
Dispatch volume Infocado [1]	34,162	275,902	540,380	411,666	524,115	578,189	367,215	**2,731,629**
Customs Data of NZ avocado exports [2]	64,469	384,473	535,227	503,839	622,123	556,403	264,517	**2,931,051**

[1] Source: Infocado [2] Source: GTIS - Global Trade Atlas **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

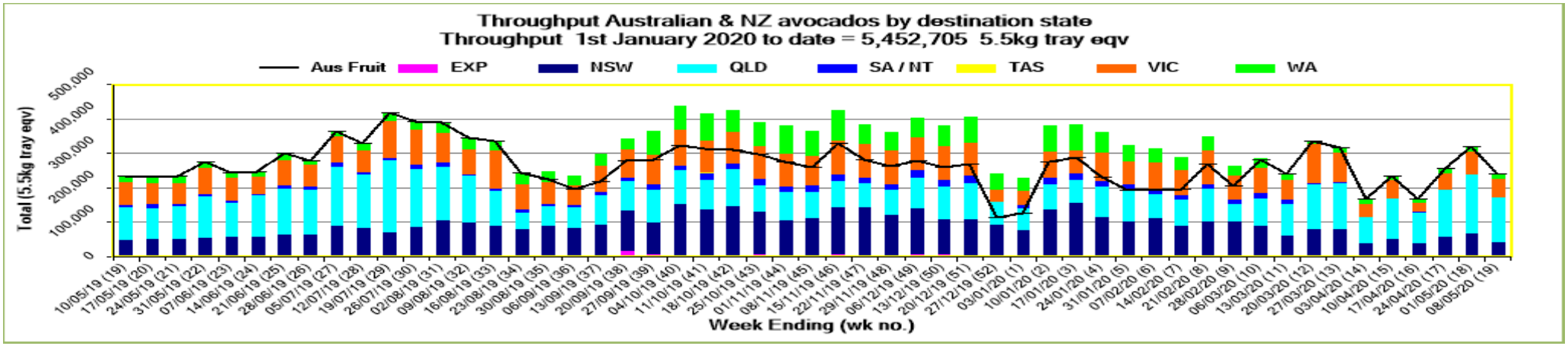
Origin of dispatched avocados

Industry Dispatches By Origin Region and Count Size : 2nd May - 8th May 2020 (Wk 19)															
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	Other	5.5Kg Eqv Trays All
	<16	16	18	20	22	23	25	28	28+	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total
Central NSW			3	30		56	29	81	94	**293**					**293**
Central Qld		839	3,527	11,867	11	14,402	19,623	16,532	5,631	**72,432**	5,054		1,211		**81,841**
North Qld	163	19,711	14,752	33,407	334	22,602	19,003	15,718	6,986	**132,676**	6,991	25,177		6,000	**151,056**
South Qld			1	14		38	120	131	205	**509**	112				**713**
Sunshine Coast	15	37	139	366	132	146	336	430		**1,601**	1,485				**4,301**
	178	**20,587**	**18,422**	**45,684**	**477**	**37,244**	**39,111**	**32,892**	**12,916**	**207,511**	**13,642**	**25,177**	**1,211**	**6,000**	**238,204**

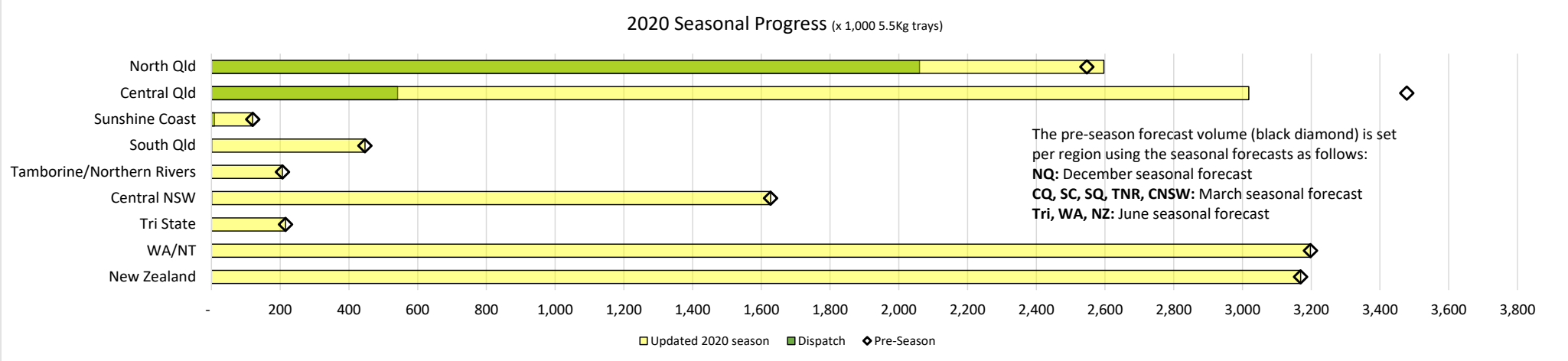
Note: NZ dispatch volumes by Count Size are estimated based on the Count Size distribution of NZ exports to all markets; and NZ dispatch volumes are reported in the week the volumes are expected to arrive in Australia, this is usually approximately one week after being shipped.

Destination of dispatched avocados

Industry Dispatches By Destination State and Count Size : 2nd May - 8th May 2020 (Wk 19)															
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	3	3	2	37					723	**768**	136				**1,015**
NSW	2	6,078	3,890	9,250	47	7,720	7,221	1,913		**36,121**	2,504	3,691			**41,345**
QLD	13	4,227	4,985	20,708	87	22,379	21,509	24,581	9,942	**108,431**	8,716	21,486	1,211	6,000	**129,496**
SA / NT		4	6	52		52	730	377		**1,221**					**1,221**
TAS			32	87		28	7	5		**159**					**159**
VIC	160	10,275	9,457	14,590	343	7,065	3,720	2,410	2,229	**50,249**	2,073				**54,018**
WA			50	960			5,924	3,606	22	**10,562**	213				**10,949**
Total	**178**	**20,587**	**18,422**	**45,684**	**477**	**37,244**	**39,111**	**32,892**	**12,916**	**207,511**	**13,642**	**25,177**	**1,211**	**6,000**	**238,204**



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 19 - 2020 Contributors - Packhouses

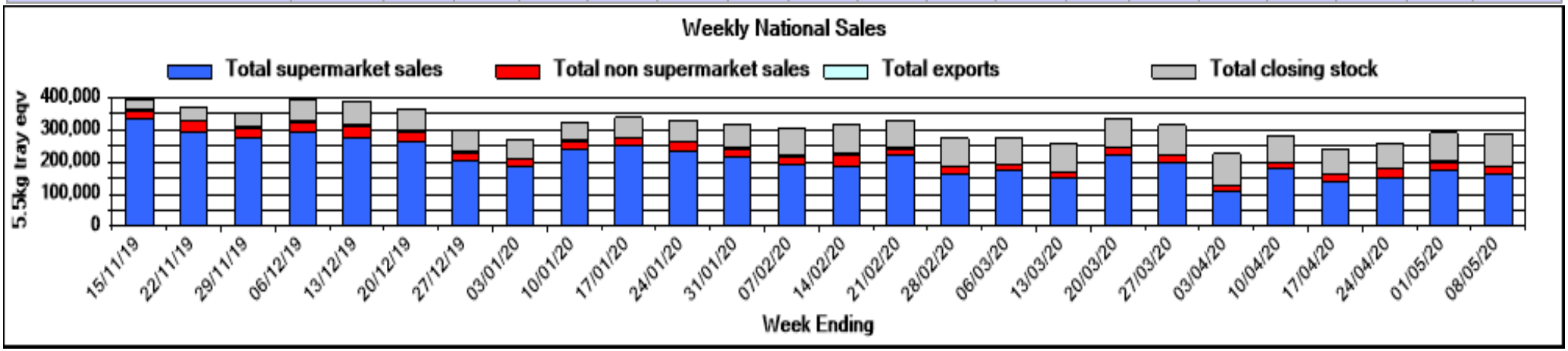
Costa Avocado (Consolidator)
Green Skin Avocados (Consolidator)
MacKays Marketing (Consolidator)
Rockridge Fresh (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Donovan Family Investment Trust (CQ)
Costa Avocado/SuperPak (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Sunnyspot Packhouse Pty Ltd (CQ)
Avocados with Altitude (NQ)
Battistin Orchards Pty Ltd (NQ)
Cobra Hill Orchards (NQ)
Gunnado Farming Pty Ltd (NQ)
Kureen Farming (NQ)
Primo Produce Pty Ltd (NQ)
Rockridge Farming Pty Ltd (NQ)
Rocky Creek Orchards N.Q Pty Ltd (NQ)
Tinaroo Falls Avocado Trust (NQ)
SQ: Less than 3 packhouse contributors
TNR: Less than 3 packhouse contributors

Week 19 - 2020 Contributors - Wholesalers

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

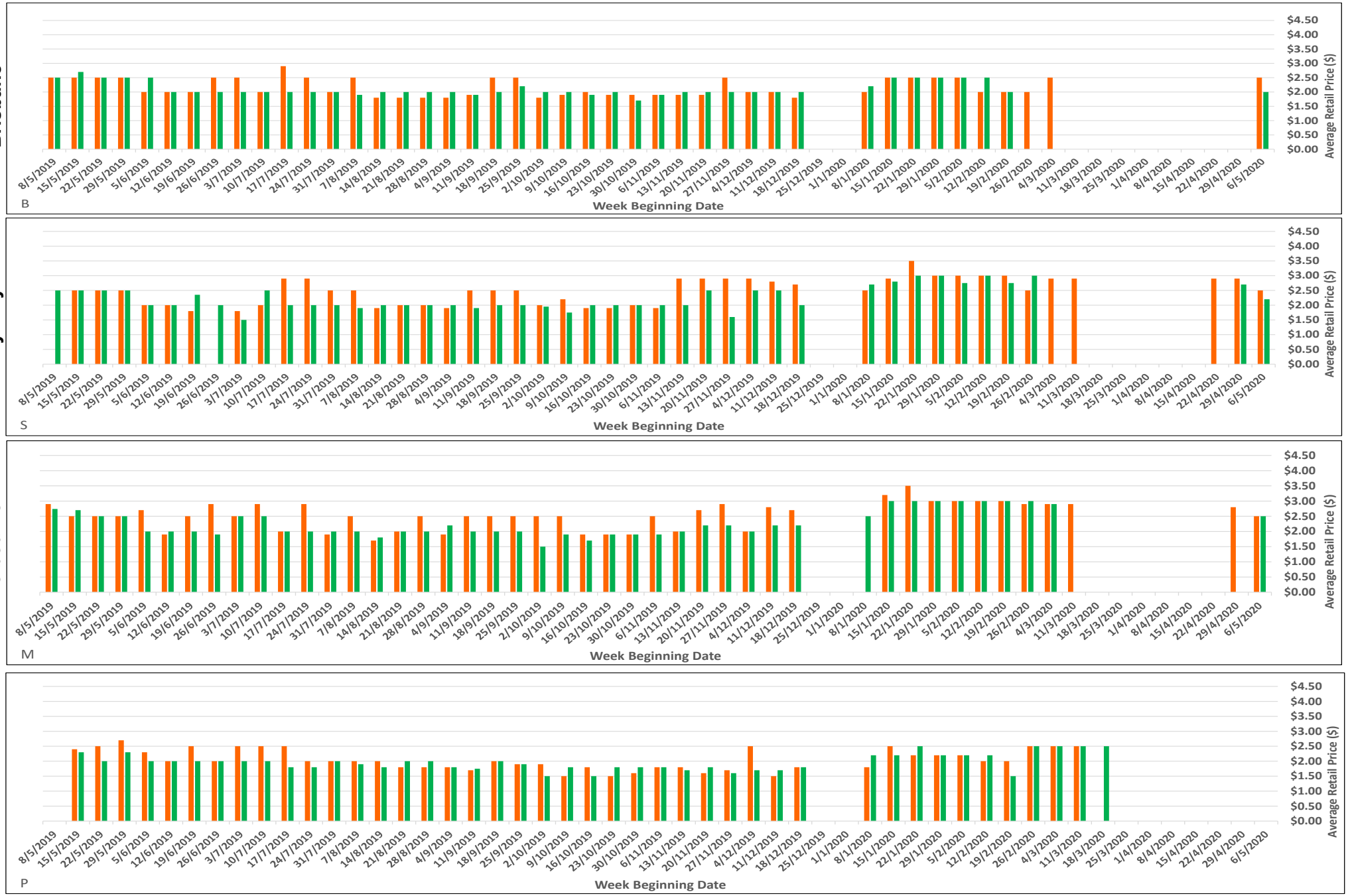
Sales report including direct sales from packhouses, wholesale sales and stock on hand at wholesale level

	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	23,655	3,295		26,950						2,592	2,827		5,419	985	24,126	3,809		27,935
Total non supermarket sales	1,209			1,209	328			328	596						1,805			1,805
Total exports	160			160											160			160
Total sales	25,024	3,295		28,319	328			328	596	2,592	2,827		5,419	985	26,091	3,809		29,900
Total Stock on Hand	3,190			3,190	816			816	1,484						4,673			4,673
QLD																		
Total supermarket sales	54,573	10,264	19,191	84,028	1,684			1,684	3,062	7,200	13,836		21,036	3,825	58,944	12,780	19,191	90,915
Total non supermarket sales	1,971			1,971	244			244	444						2,415			2,415
Total exports	480	288		768	136			136	247						727	288		1,015
Total sales	57,024	10,552	19,191	86,767	2,064			2,064	3,753	7,200	13,836		21,036	3,825	62,086	13,068	19,191	94,344
Total Stock on Hand	29,637	5		29,642	57	1		58	105						29,741	7		29,747
SA & TAS																		
Total supermarket sales	3,791			3,791											3,791			3,791
Total non supermarket sales	1,954	485		2,439	1,604	190	79	1,873	3,405						4,870	830	144	5,844
Total exports																		
Total sales	5,745	485		6,230	1,604	190	79	1,873	3,405						8,661	830	144	9,635
Total Stock on Hand	6,467			6,467	235	6		241	438						6,894	11		6,905
VIC																		
Total supermarket sales	Full data set not displayed because less than three wholesalers from this state contributed data this week																	
Total non supermarket sales																		
Total exports																		
Total sales	30,748	1,565		32,313	1,833			1,833	3,333						34,081	1,565		35,646
Total Stock on Hand																		
WA																		
Total supermarket sales	7,125	3,199		10,324											7,125	3,199		10,324
Total non supermarket sales	4,684	58		4,742	1,032	4		1,036	1,884						6,560	65		6,626
Total exports																		
Total sales	11,809	3,257		15,066	1,032	4		1,036	1,884						13,685	3,264		16,950
Total Stock on Hand	18,675			18,675	903			903	1,642						20,317			20,317
Total																		
Total supermarket sales	114,274	18,323	19,191	151,788	2,671			2,671	4,856	9,792	16,663		26,455	4,810	120,911	21,353	19,191	161,454
Total non supermarket sales	15,436	543		15,979	4,054	194	79	4,327	7,867						22,806	896	144	23,846
Total exports	640	288		928	136			136	247						887	288		1,175
Total sales	130,350	19,154	19,191	168,695	6,861	194	79	7,134	12,971	9,792	16,663		26,455	4,810	144,604	22,536	19,335	186,475
Total Stock on Hand	92,068	5		92,073	5,033	7		5,040	9,164						101,219	18		101,236



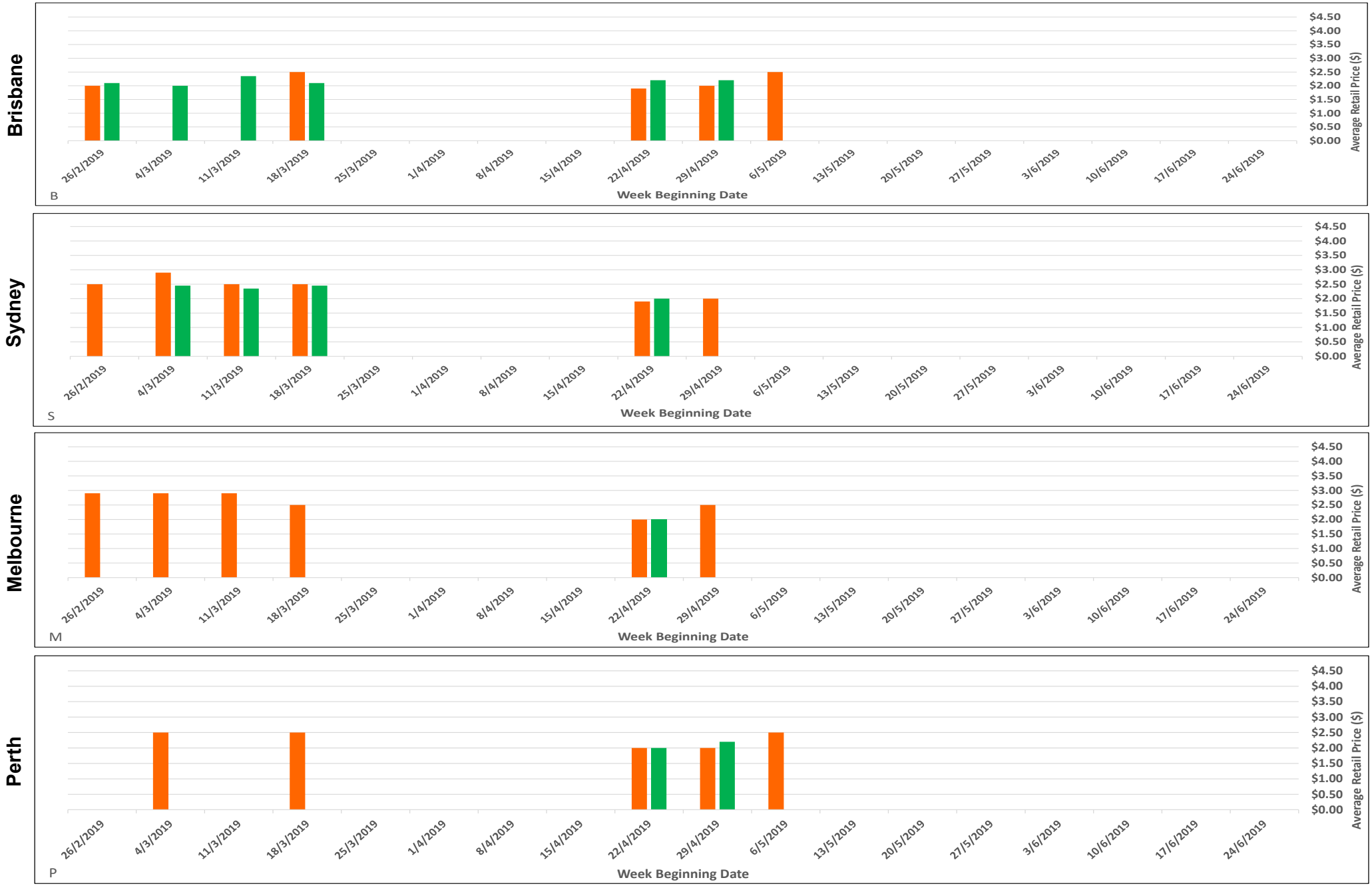
Avocados Australia online retail pricing report **Reporting period: week 19-2020 (Wed 06/05/20 – Tue 12/05/20)**

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



Avocados Australia online retail pricing report **Reporting period: week 19-2020 (Wed 06/05/20 – Tue 12/05/20)**

Shepard 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 19-2020 (Wed 06/05/20 - Tue 12/05/20)

	Pack Type	Variety	Description	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass		$2.50	$2.50 ↓	$2.50 ↓	
	Multi-buy	Hass		2 for $4.00 *	2 for $4.00 *	2 for $4.00 *	
	Single fruit	Shepard		$2.50 ↑			$2.50 ↑*
	5 pack	not indicated			$6.90	$5.90	$7.90
	550g punnet	not indicated					
	1kg bag	not indicated	I'm Perfect		$6.90	$5.90	
	Organic Single fruit	not indicated					
Woolworths	Single fruit	Hass		$2.00	$2.20 ↓	$2.50	
	Single fruit	Shepard					
	3 pack	Hass					
	5 pack	not indicated	The Avolution Avocados	$6.50	$6.50		$6.50
	1kg Prepacked	not indicated	Odd Bunch	$7.00 ↑	$7.00	$7.00 ↑	$7.00
	Organic Single fruit	not indicated			$5.50		
	550g Organic mini fruit	not indicated					
	Bundle of 20	Hass					
Single fruit average by city (all varieties, excluding organic)				$2.33 ↑	$2.35 ↓	$2.50	$2.50 ↑
Single fruit average (all varieties, excluding organic)			$2.40 ↑				

Catalogue offers on avocados:

Coles - National: No catalogue offers

Woolworths - Sydney: Australian Hass $2.20 each

Aldi - National: No catalogue offers

Foodworks - Brisbane: Australian Hass (Large) $1.79 each

Foodworks - Sydney: Australian Shepard $1.99 each

Foodworks - Melbourne: Australian Hass $2.99 each

Foodworks - Perth: Australian Hass $3.49 each

IGA - Brisbane: Australian Hass $1.90 each

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

06/05/20 (Week 19)
Coles single Hass price not available in Perth.
Coles single Shepard price not available in Syd & Melb.
WW single Hass price not available in Perth.
WW single Shepard price not available in all states.

29/04/20 (Week 18)
Coles single Hass price available in Syd. & Melb. only.
WW single Hass price available in Sydney only.
WW single Shepard price not available in Sydney & Melb..

22/04/20 (Week 17)
Coles single Hass price available in Sydney only.
WW single Hass not available in all states.

25/03/20 - 15/04/20 (Week 13 - Week 16)
Retail prices not available online due to COVID-19

18/03/20 (Week 12)
Coles single Hass price available in Perth only.
WW single Shepard price not available in Melb. & Perth.
WW single Hass price not available in all states.

11/03/20 (Week 11)
Coles single Shepard price not available in Brisb. & Perth.
Coles single Hass price not available in Brisbane.
WW single Shepard price not available in Melb. & Perth.
WW single Hass price not available (except Perth).

04/03/20 (Week 10)
Coles single Shepard price not available in Brisbane.
WW single Hass price not available in Brisbane & Sydney.
WW single Shepard price not available in Melb. & Perth.

26/02/2020 (Week 09)
Coles single Shepard price not available in Perth.
WW single Hass price not available in Brisbane.
WW single Shepard price not available in Syd., Mel., Per.

Avocados Australia

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