Infocado weekly report: 08 - 14 July 2017 (week 28)

[Conduct dry matter tests at home]

[What is Infocado?]

[Using and interpreting Infocado reports]

[Avocado supply chain education materials]

Comments

- **Any packhouses who are planning to start dispatching fruit in the next four weeks, could you please enter your weekly forecast data. This includes packhouses in Tamborine/Northern Rivers, Central NSW, South Qld and Tristate – all varieties.**
- The weekly dispatch volume of 248,461 trays was slightly lower than the forecast of 281,510 trays. As can been seen from the regional dispatch data (p.3) Central NSW and Central Qld continued to increase their dispatch volumes this week. The majority of fruit is still coming from Central Queensland.
- New Zealand 2017-18 season data has been released showing imports forecast to come to Australia from August 2017 to March 2018. The pre-season forecast is given on p.2, and at this stage totals approximately 55% of the amount dispatched to Australia in the 2016-2017 season.
- Online weekly retail prices are provided for week 28 (Wed 12 July - Tues 18 July 2017).
- Avocados Australia is calling on industry members to complete our **Online Communication Survey** - this enters you into the draw to win $500! We want to know your views; what is important to you and how we can do the best job of providing you with industry-relevant information. The survey should take 15-20 minutes to complete. The prize winner will be announced in the Guacamole. Please click here: https://www.surveymonkey.com/r/AvocadosAustralia2017.

Marketing update: marketing and avocado sales

Looking at the year period to 17 May, 2017, the great news is that avocados have seen an increase across all their Nielsen KPI Metrics. Compared to the same period in 2015/16, the percentage of households buying avocados has gone from 69.2 percent to 71.4 percent. Not only are more people buying avocados, they are also buying more avocados annually, and as a result are spending more, with the average annual household spend increasing from $36.77 to $38.40 each per year. The avocado industry's marketing is managed by Horticulture Innovation Australia (Hort Innovation) and funded by the avocado marketing levy.

Upcoming holidays impacting reporting deadlines

Ekka People's Day (QLD): 16 August | Queen's Birthday (WA): 25 Sept | Labour Day (NSW, ACT & SA) | Queen's Birthday (QLD): 2 Oct

Report Index

p2: Four-weekly forecasts; import data | p3: Dispatches | p4: Dispatches by region; contributor lists | p5: Wholesale data | p6&7 Retail prices

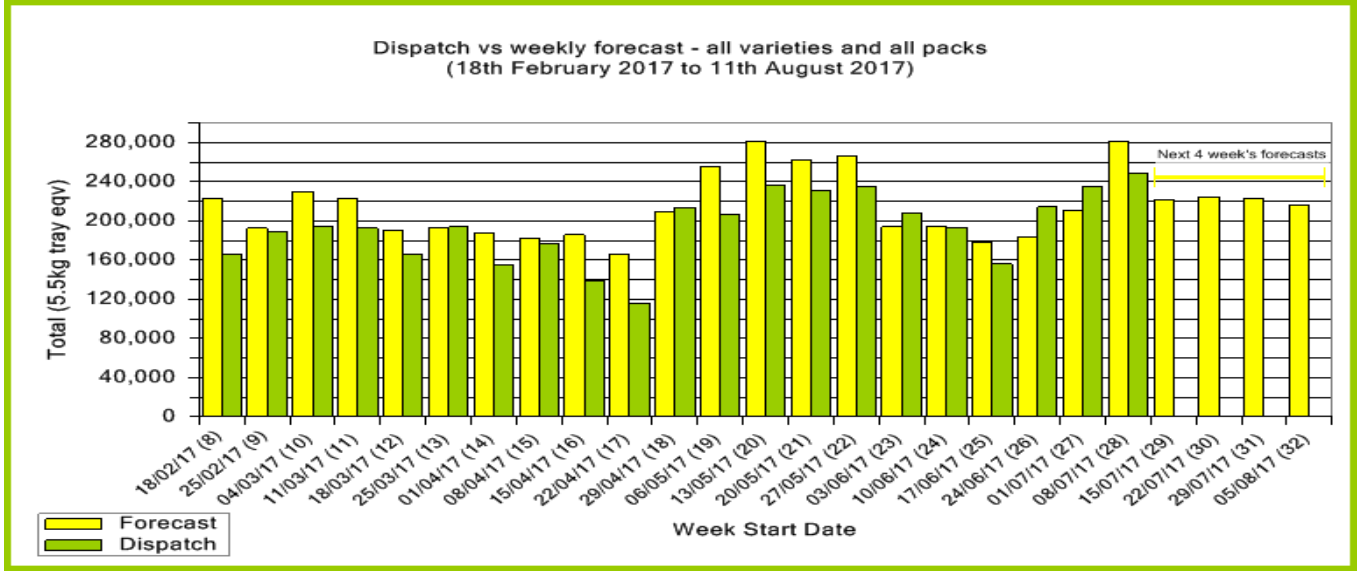
REPORT NOTES:
The **Weekly Infocado** report is compiled using data contributed by avocado packhouses, consolidators and wholesalers into the Infocado system. We estimate that 85% of industry is represented in this report. Please note that **Quarterly Infocado** reports incorporate an allowance (by region) 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 publically released six weeks later. Until public release, the report is confidential and may also be legally privileged. You should not copy it or use it for any purpose, nor disclose its contents to any other person.
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.

Yellow shading indicates forecast data

Forecast Data (Week 28 - 32)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 28 - begin 08/07/2017					
Hass	254,820	13,543	10,600	500	**281,462**
Other	30	10			**48**
Week Total	**254,850**	**13,553**	**10,600**	**500**	**281,510**
Week 29 - begin 15/07/2017					
Hass	190,720	14,640	10,600		**219,265**
Other	140	60			**249**
Sharwil	1,600	360			**2,255**
Week Total	**192,460**	**15,060**	**10,600**		**221,769**
Week 30 - begin 22/07/2017					
Hass	193,416	14,878	10,600		**222,394**
Other	40	10			**58**
Sharwil	1,600	300			**2,145**
Week Total	**195,056**	**15,188**	**10,600**		**224,598**
Week 31 - begin 29/07/2017					
Hass	193,066	15,390	10,600		**222,975**
Other	40	10			**58**
Week Total	**193,106**	**15,400**	**10,600**		**223,033**
Week 32 - begin 05/08/2017					
Hass	188,866	14,140	10,600		**216,502**
Other	40	10			**58**
Week Total	**188,906**	**14,150**	**10,600**		**216,560**

Green shading indicates dispatch data

Dispatch Data (Week 28 - begin 8/07/2017)					
Variety	Trays	Bulk	P/PK	Proc	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Total Trays
Gem	**2,695**	172			**3,008**
Hass	**195,385**	26,838	600	1,400	**244,545**
Lamb Hass	**20**	34			**82**
Other	**39**	11			**59**
Sharwil	**639**	54			**737**
Shepard	**30**				**30**
Total	**198,808**	**27,109**	**600**	**1,400**	**248,461**



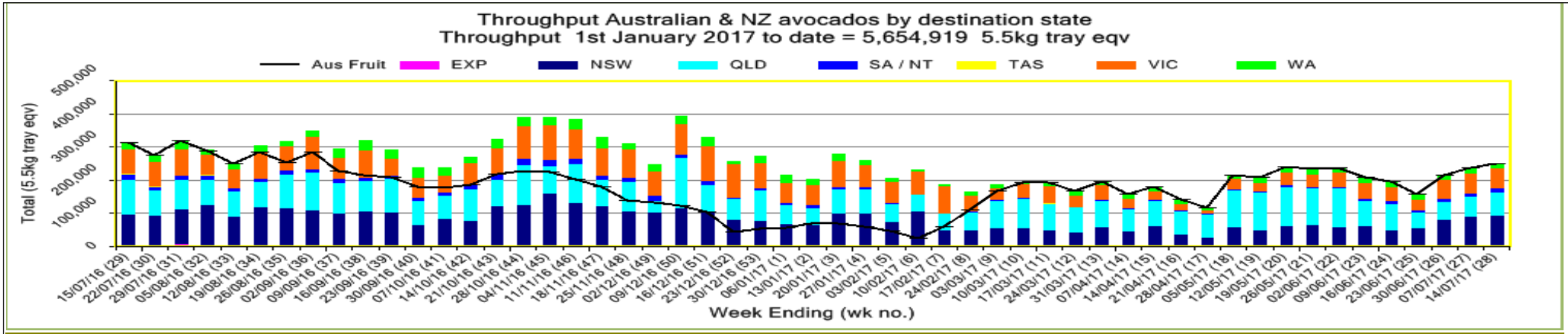
New Zealand avocado exports: forecast v actual Infocado/export statistics (5.5kg eqv trays) August 2017 - March 2018									
Export destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
NZ-Aus pre-season forecast[1]	6,500	108,060	265,640	333,040	596,740	491,700	366,820	15,520	**2,184,020**
NZ-Aus: seasonal forecast[2] (not yet updated)									
NZ-Aust: Infocado dispatches[3]									
NZ imports (from ABS)									
NZ-USA[4]									
NZ-Japan[4]									
NZ-other Asia[4]									
Total Dispatch [3,4]									

1 Source: Infocado data, pre-season forecast provided by NZ at start of season
2 Source: Infocado data, actual dispatch & updated seasonal forecast data provided by NZ at time indicated in brackets
3 Source: Infocado data, aggregated weekly dispatch data provided by NZ. Data for current month shows volume to date of current report
[a] Import data not yet available from ABS. [b] Export data not yet available from Infoshare NZ (NZ Govt) [c] Data not complete for month
4 Source: Infoshare New Zealand

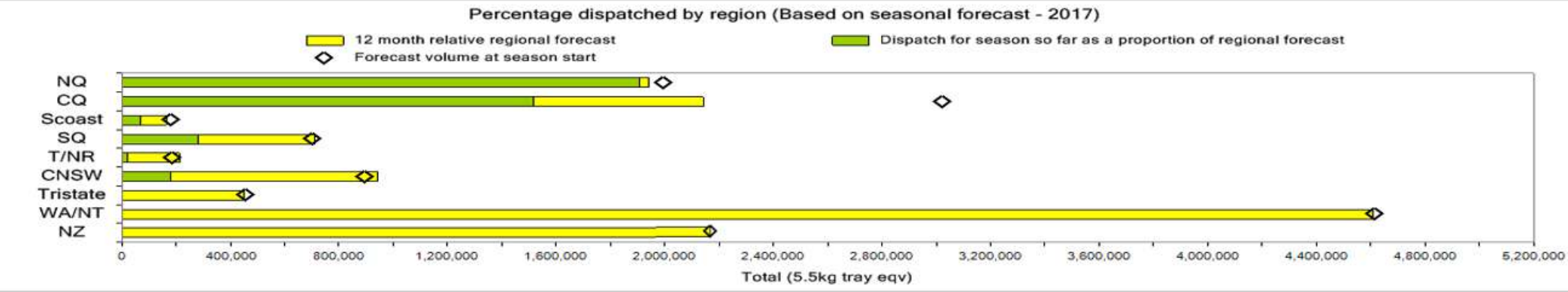
Industry Dispatches By Origin Region and Count Size : 8th July - 14th July 2017 (Wk 28)														
Origin Region	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**5.5kg**	**Trays - Total**	**Bulk**	**P/PK**	**Proc**	**5.5Kg Eqv Trays All**
	<16	**16**	**18**	**20**	**22**	**23**	**25**	**28**	**28+**	**5.5Kg Eqv**	**10Kg**	**Kg**	**Kg**	**Total**
Central NSW	16	681	2,496	10,123	3,549	7,759	5,764	5,454		**35,842**	5,478			**45,802**
Central Qld	63	2,840	16,667	28,531		22,039	29,069	13,850	3,785	**116,844**	10,141		800	**135,427**
North Qld						152	152	152		**456**				**456**
South Qld	9	62	558	3,650	516	3,940	7,056	4,182	2,671	**22,644**	6,490			**34,444**
Sunshine Coast	316	903	1,379	2,171	746	5,055	4,076	4,058	2,379	**21,083**	4,692			**29,614**
Tamborine/ Northern Rivers		6	61	144	112	388	551	323	354	**1,939**	308	600	600	**2,717**
	404	**4,492**	**21,161**	**44,619**	**4,923**	**39,333**	**46,668**	**28,019**	**9,189**	**198,808**	**27,109**	**600**	**1,400**	**248,461**

Origin of Avocado **Destination of Avocado**

Industry Dispatches By Destination State and Count Size : 8th July - 14th July 2017 (Wk 28)														
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									2,563	**2,563**	137			**2,812**
NSW	24	491	6,936	19,489	4,464	15,691	14,428	1,831	359	**63,713**	13,354	600		**88,102**
QLD	66	718	2,724	5,785	323	13,513	19,587	10,152	5,711	**58,579**	7,141		1,400	**71,818**
SA / NT			19	257		685	1,304	7,285	270	**9,820**	750			**11,184**
VIC	314	3,123	10,943	17,547	136	8,935	10,034	1,992	286	**53,310**	4,785			**62,010**
WA		160	539	1,541		509	1,315	6,759		**10,823**	942			**12,536**
Total	**404**	**4,492**	**21,161**	**44,619**	**4,923**	**39,333**	**46,668**	**28,019**	**9,189**	**198,808**	**27,109**	**600**	**1,400**	**248,461**



The 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 by contributors



Week 28 Contributors - Packhouses

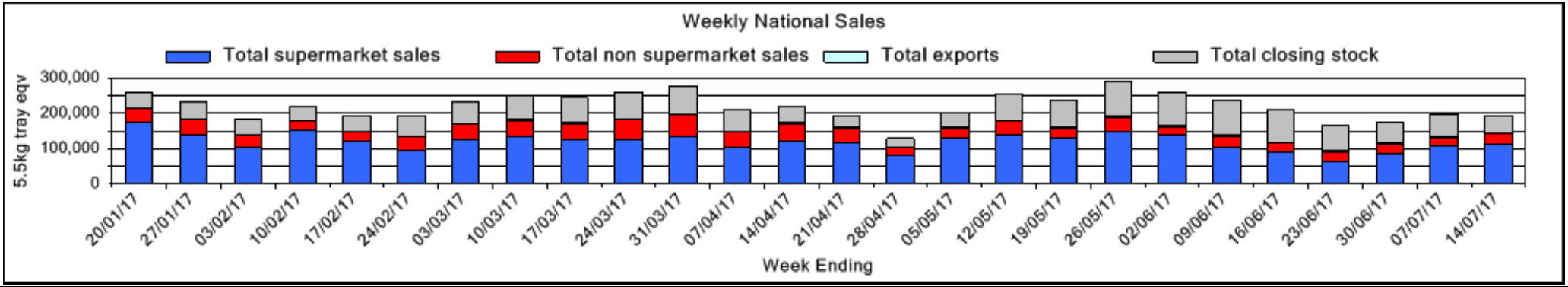
Costa Group (Consolidator)
Natures Fruit Company (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Sunfresh (Consolidator)
The Avolution (Consolidator)
I & A Tolson (CNSW)
Coastal Avocados (CNSW)
Midcoast Avocados (CNSW)
Costa Avocados/SuperPak (CQ)
Lava Valley Produce (CQ)
Donovan Family Investment Trust (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Sunnyspot Packhouse Pty Ltd (CQ)
Green Nugget Orchards (SQ)
Mountain Fresh (SQ)
Balmoral Orchard (SQ)
Touchwood Farming (SQ)
Wodonga Park Fruit and Nuts (SQ)
Sunnyspot Packhouse Pty Ltd (SQ)
Jirel Holdings (TNR)
Merrinee Farm (TNR)
Aussie Orchards Growers & Packers (TNR)
T W Silver (TNR)
NQ: Less than 3 Packhouse Contributors
SC: Less than 3 Packhouse Contributors
WA: Less than 3 Packhouse Contributors

Week 28 Contributors - Wholesalers

Costa Farms (Adelaide)
Costa Farms (Melbourne)
De Luca Banana Marketing Pty Ltd (Brisbane)
Etherington (Perth)
Favco Queensland Pty Ltd (Brisbane)
Fresh Choice WA Pty Ltd (Perth)
LaManna Premier Group (Melbourne)
Montague Fresh (Brisbane)
Murray Bros (Brisbane)
Sinclair & Antico (Aust) Pty Ltd (Sydney)
The LaManna Group (Adelaide)
The LaManna Group (Sydney)
United Fresh (Adelaide)
VB Sculli (Melbourne)

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

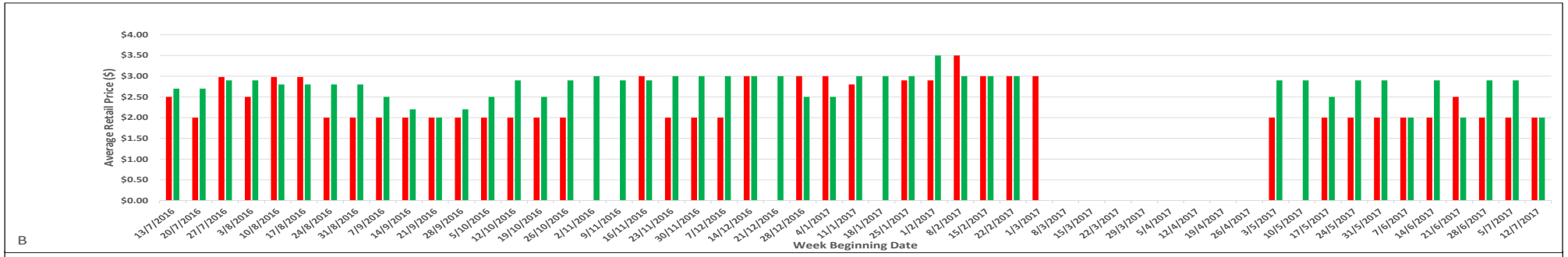
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shep-ard	Other	Total	Hass	Shep-ard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales	Full data set not displayed because less than three wholesalers from this state contributed data this week																	
Total non supermarket sales																		
Total exports																		
Total sales	40,181		80	40,261	1,473			1,473	2,678	600			600	109	42,968		80	43,048
Total Stock on Hand																		
QLD																		
Total supermarket sales	29,020			29,020	2			2	4						29,024			29,024
Total non supermarket sales	8,074			8,074											8,074			8,074
Total exports	2,403			2,403	137			137	249						2,652			2,652
Total sales	39,497			39,497	139			139	253						39,750			39,750
Total Stock on Hand	25,818			25,818	76			76	138						25,956			25,956
SA & TAS																		
Total supermarket sales	9,312			9,312	2			2	4						9,316			9,316
Total non supermarket sales	3,746			3,746	794			794	1,444						5,190			5,190
Total exports																		
Total sales	13,058			13,058	796			796	1,447						14,505			14,505
Total Stock on Hand	11,607			11,607	2,332			2,332	4,240						15,847			15,847
VIC																		
Total supermarket sales	26,935			26,935											26,935			26,935
Total non supermarket sales	6,686			6,686	571			571	1,038						7,724			7,724
Total exports																		
Total sales	33,621			33,621	571			571	1,038						34,659			34,659
Total Stock on Hand	3,339			3,339	185			185	336						3,675			3,675
WA																		
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	11,587			11,587	784		150	934	1,698						13,012		273	13,285
Total Stock on Hand																		
Total																		
Total supermarket sales	112,800			112,800	1,284			1,284	2,335	600			600	109	115,244			115,244
Total non supermarket sales	22,581		80	22,661	2,342		150	2,492	4,531						26,839		353	27,192
Total exports	2,563			2,563	137			137	249						2,812			2,812
Total sales	137,944		80	138,024	3,763		150	3,913	7,115	600			600	109	144,895		353	145,248
Total Stock on Hand	43,127			43,127	2,891			2,891	5,256						48,383			48,383



Online retail pricing for Hass single fruit: 12 months to week beginning Wednesday 12 July 2017 (Week 28)

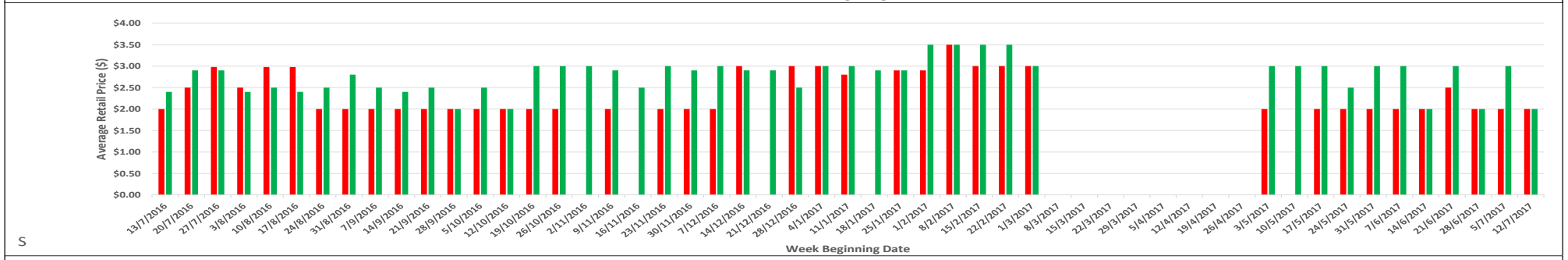
Key: Coles online Woolworths online

Brisbane



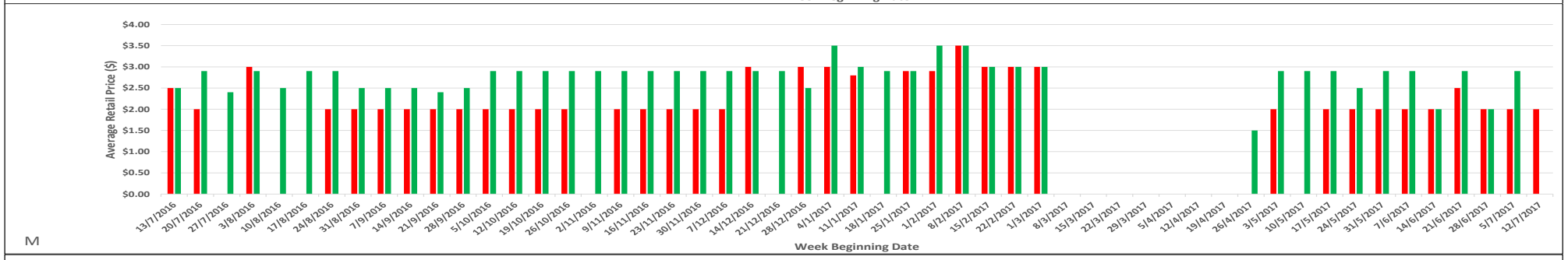
B

Sydney



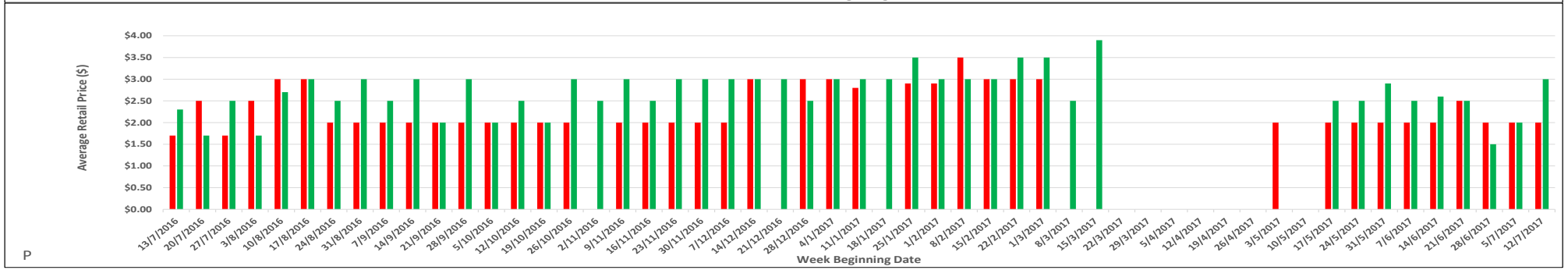
S

Melbourne



M

Perth



P

Online retail pricing for single fruit, multi-buy and packs: week beginning Wed 12 July 2017 (week 28)

	Pack Type	Variety	Description	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass		$2.00	$2.00	$2.00	$2.00
	Multi-buy			-	-	-	-
	3 Pack	Hass		$5.00	$5.00	$5.00	$5.00
	Single fruit	*not indicated*	*Organic*	$6.00	$6.00	$6.00	$6.00
	2 Pack	*not indicated*	*Organic*	$9.00	$9.00	$9.00	$9.00
Woolworths	Single fruit	Hass		↓$2.00*	↓$2.00*	-	↑$3.00*
	Multi-buy	Hass		-	-	-	-
	3 Pack			$5.90	↑$5.50	-	$6.60
	5 Pack			$5.90	$5.00	$4.90	$6.90
	1kg Bag	*not indicated*	*Odd Bunch*	$6.60	$7.90	$8.90	↑$9.90
	Single fruit		*Organic*	-	-	-	-
	2 Pack	*Hass*	*Organic*	-	-	$8.00	-

Key: *offer was advertised as a weekly and/or catalogue special

(Green) + ↑ = increase in price from previous week

(Yellow) = same price as previous week

(Orange) +↓ = decrease in price from previous week

Notes for above table:

Woolworths in Melbourne do not have a price for single fruit or 3 pack this week.

Woolworths in Brisbane, Sydney and Perth offer 3 pack and 5 pack at the same (or almost the same) price; weights are not given.

Notes relating to graph on previous page:

Online retail pricing for Hass single fruit: 12 month graph

10/05/17 (Week 19)
Coles data not available for all states
Woolworths data not available for Perth

03/05/17 (Week 18)
Woolworths data not available for Perth

26/04/17 (Week 17)
Coles data not available for all states
Woolworths data only available for Melbourne

22/03/17 to 9/04/17 (Weeks 12 to 16)
Coles & Woolworths data not available for all states for these five weeks

15/03/17 (Week 11)
Coles data not available for all states
Woolworths data only available for Perth

08/03/17 (Week 10)
Coles data not available for all states
Woolworths data only available for Perth

01/03/17 (Week 9)
Woolworths data not available for Brisbane

Catalogue Offers:

Aldi - national - no catalogue offers found

Coles - all states - no catalogue offers found

Woolworths - Brisbane and Sydney - Australian Hass single fruit $2.00

Woolworths - Melbourne and Perth - no catalogue offers found

Foodworks - all states - no catalogue offers found

IGA - Brisbane - Australian Hass multi-buy 2 for $4.00

IGA - Sydney - Australian Hass single fruit - $2.00

IGA - Melbourne - - no catalogue offers found

IGA - Perth - Australian Hass single fruit - $1.99

Data collection: Prices published in this report reflect online shopping and catalogue prices from Wednesday to Tuesday, with prices published each Wednesday by major retailers.