INFOCADO WEEKLY REPORT: 25th Feb—3rd March 2017 (Week 9)

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Comments

- North Queensland and Central Queensland packers who are planning to start harvest in the next four weeks, could you please enter your weekly forecast data.
- In total the weekly dispatch volume of 188,552 trays was slightly less than the forecast of 192,788 trays. The report shows that the Hass forecast was over estimated but the Shepard forecast was under estimated resulting in only a small difference between the total forecast and dispatch. This report shows that now only 12% of fruit dispatched was of New Zealand origin and 81% is Shepard coming from North Queensland.
- Hass volumes have now dropped off significantly as Shepard volumes increase. It's an important time to remind any of your growers to make sure all fruit is mature (at least 21% dm for Shepard) before picking to ensure high quality fruit in the market.
- There have been a number of reports on the Australian Avocados Facebook page of consumers not being able to ripen their Shepard avocados—"they just stay rubbery and wont soften". We all know what that means, so please take care to ensure only mature fruit is marketed.
- Online Weekly Retail Prices are provided for week 9 (Wed, 1st March —Tues, 7th March).

Marketing Update: Social and Digital media

Facebook has been attracting solid engagement (number of likes, shares and comments) since mid-February. An average of 2 posts/week attracted a total of 19,892 reactions (likes/loves/wows). The 4 most successful posts since mid-February: 3 simple avocado recipes and a video post 'The Shepard season has begun!...'. Followers are engaging with simple, quick and nutritious ways to use avocados and real-time info about the industry.

Upcoming Holidays

Canberra Day (ACT), Labour Day (VIC) & Adelaide Cup (SA): 13th March | Good Friday: 14th April | Easter Monday: 17th April | Anzac Day: 25th April

Report Index

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IMPORTANT and PLEASE NOTE:
The monthly forecast and dispatch figures in the Quarterly Infocado Report incorporate an allowance (which varies by region) to allow for the production forecasts and dispatches that are not inputted into the Infocado system. This production (dispatch and forecast) data is not inputted for various reasons including some packhouse's unwillingness to engage with industry and/or lack of computer access. For this reason it is not possible to extrapolate the figures from the Weekly Infocado Report to come up with either the dispatch and/or forecast figures in the Quarterly Infocado Report. At any time the Weekly Infocado Report incorporates around 85% of total production and forecasts however this does vary depending on time of year (as a result of the fruit coming from different regions with different levels of packhouse input). It is not functionally possible to incorporate allowances for missing data into the Weekly Infocado Report hence the variance between it and the Quarterly Infocado Report.
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This project has been funded by Horticulture Innovation Australia Limited (HIA) using the avocado industry levy and funds from the Australian Government.

`Yellow shading indicates forecast data

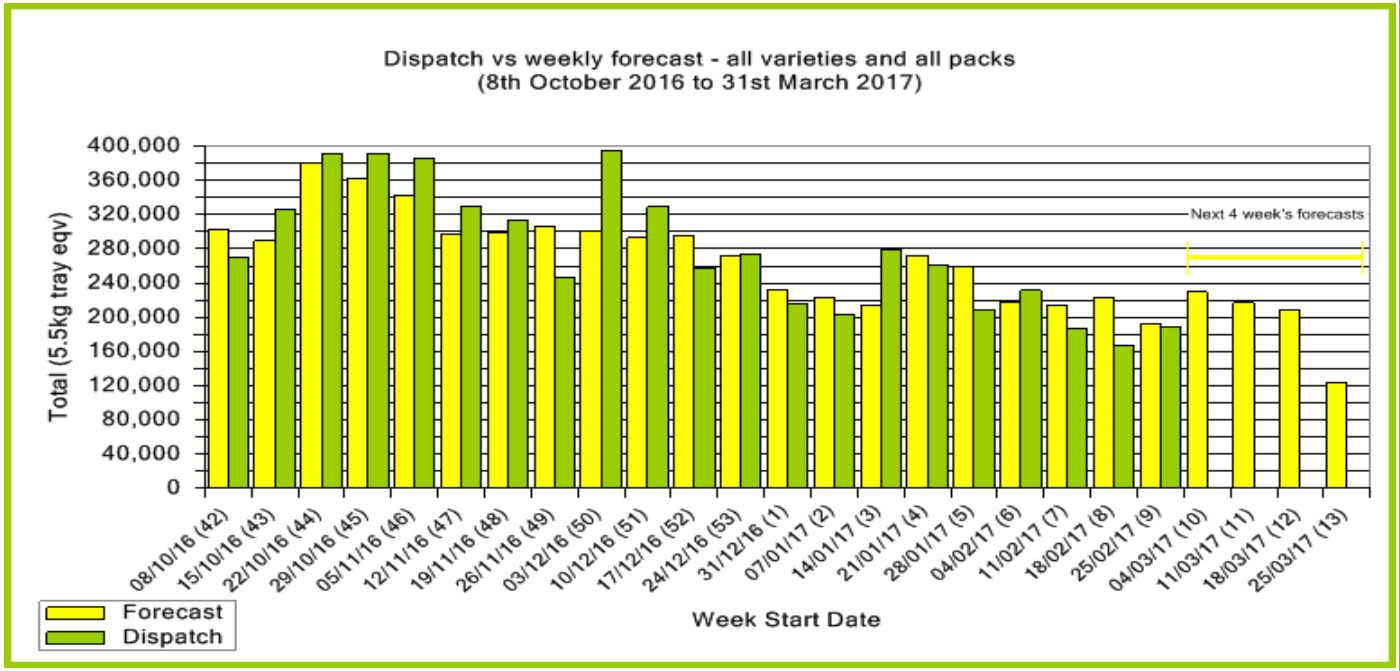
Green shading indicates dispatch data

Forecast Data (Week 9 - 13)

Variety	Trays - Total	Bulk	P/Pk	Proc	Other	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	5.5Kg Eqv
Week 9 - begin 25/02/2017						
Hass	75,030	491				**75,923**
Shepard	112,400	2,060	960	3,000		**116,865**
Week Total	**187,430**	**2,551**	**960**	**3,000**		**192,788**
Week 10 - begin 04/03/2017						
Hass	18,450	100				**18,632**
Shepard	187,000	11,500	20	14,000	4,000	**211,185**
Week Total	**205,450**	**11,600**	**20**	**14,000**	**4,000**	**229,817**
Week 11 - begin 11/03/2017						
Shepard	189,000	13,250	20	17,500	4,000	**217,004**
Week Total	**189,000**	**13,250**	**20**	**17,500**	**4,000**	**217,004**
Week 12 - begin 18/03/2017						
Shepard	181,500	12,650	20	17,500	4,000	**208,413**
Week Total	**181,500**	**12,650**	**20**	**17,500**	**4,000**	**208,413**
Week 13 - begin 25/03/2017						
Shepard	108,500	6,900	20	13,000	4,000	**124,140**
Week Total	**108,500**	**6,900**	**20**	**13,000**	**4,000**	**124,140**

Dispatch Data (Week 9 - begin 25/02/2017)

Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Hass	31,199	496				**32,101**
Shepard	131,027	11,596	2,252	17,369	4,256	**156,452**
Total	**162,226**	**12,092**	**2,252**	**17,369**	**4,256**	**188,552**



New Zealand Avocado Exports—Forecast v Actual Infocado/Export Statistics (5.5kg eqv trays) July 2016 – April 2017

Export Destination	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	Total
NZ-Aus-Pre Season Forecast[1]	20,936	146,782	593,173	608,847	661,481	744,263	844,138	837,098	56,375	1,980	**4,515,073**
NZ-Aus-Season Forecast Updated (Dec 2016)[2]	0	98,497	393,930	422,869	683,373	1,058,295	711,639	562,826	25,014	0	**3,956,443**
NZ-Aust-Infocado Dispatches[3]	0	98,497	393,930	422,869	683,373	1,058,295	711,639	562,826	22,814		**3,954,243**
NZ Imports (from ABS)	0	146,755	368,741	483,657	836,227	1,077,553	839,955	NA[ac]			**3,752,288**
NZ-USA[4]	0	0	0	0	15	5	0	0			**20**
NZ-Japan[4]	0	0	46,379	143,597	112,178	32,086	4,057	360[bc]			**338,657**
NZ-Other Asia[4]	180	35,855	80,442	230,728	147,138	71,156	45,729	10,220[bc]			**621,448**
Total Dispatch (3+4)	**180**	**134,352**	**520,751**	**797,194**	**942,704**	**1,161,542**	**761,425**	**573,406[c]**	**22,814**		**4,914,368**

1 Source: Infocado data, Seasonal Forecast provided by NZ at start of season
2 Source: Infocado data, Actual Dispatch Data & 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

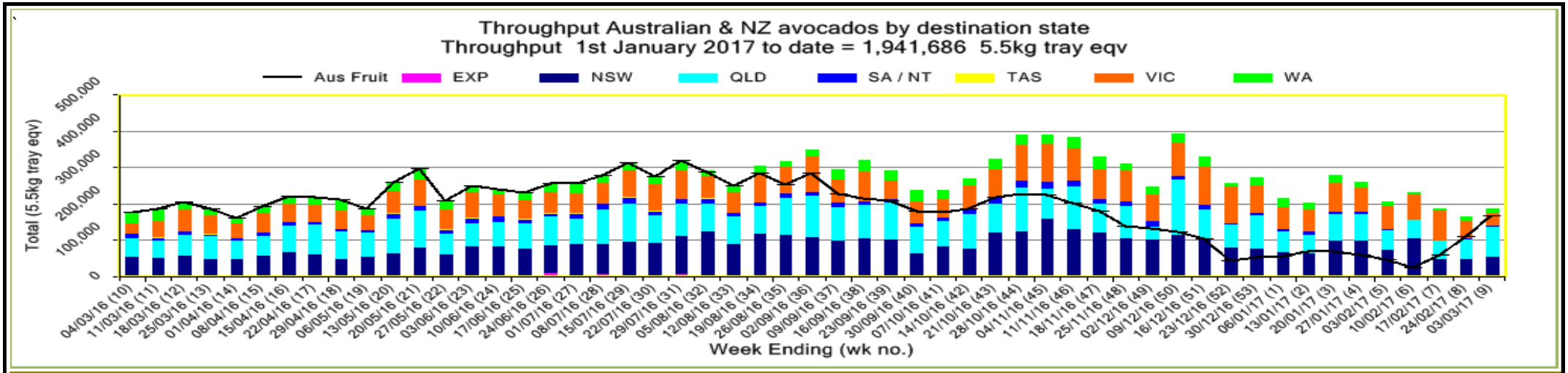
Industry Dispatches By Origin Region and Count Size : 25th February - 3rd March 2017 (Wk 9)

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 Qld											1,028				**1,869**
New Zealand		1,187	2,144	4,609		4,016	5,247	2,692	2,919	**22,814**					**22,814**
North Qld		9,604	12,615	26,289	1,727	23,939	28,580	23,863	2,007	**128,624**	10,475	2,252	17,369	4,256	**152,010**
South Qld	3	149	467	546					580	**1,745**	2				**1,749**
Sunshine Coast		9	25	127		827	354	481		**1,823**	93				**1,992**
WA/NT	101	328	420	2,671		1,601	1,235	864		**7,220**	494				**8,118**
	104	**11,277**	**15,671**	**34,242**	**1,727**	**30,383**	**35,416**	**27,900**	**5,506**	**162,226**	**12,092**	**2,252**	**17,369**	**4,256**	**188,552**

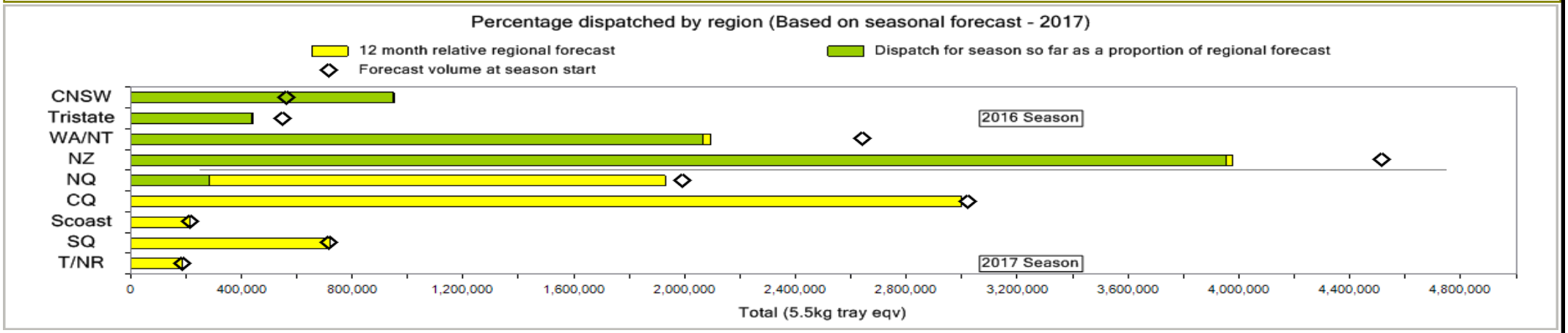
Origin of Avocado **Destination of Avocado**

Industry Dispatches By Destination State and Count Size : 25th February - 3rd March 2017 (Wk 9)

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
NSW		2,645	4,684	11,547	51	11,890	10,796	4,486	1,422	**47,521**	4,003	352			**54,863**
QLD		5,621	5,889	8,765	1,676	11,606	15,802	13,319	2,791	**65,469**	6,224	321	17,369	4,256	**80,775**
SA / NT		77	172	87		69	124	3,513		**4,042**	199	183			**4,437**
TAS							640			**640**	96				**815**
VIC	40	2,285	3,842	9,788		4,487	5,865	5,229	762	**32,298**	1,191	1,396			**34,717**
WA	64	649	1,084	4,055		2,331	2,189	1,353	531	**12,256**	379				**12,945**
Total	**104**	**11,277**	**15,671**	**34,242**	**1,727**	**30,383**	**35,416**	**27,900**	**5,506**	**162,226**	**12,092**	**2,252**	**17,369**	**4,256**	**188,552**



NB: The graph below utilises the seasonal forecast data (without adjustment). 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 9 Contributors - Packhouses

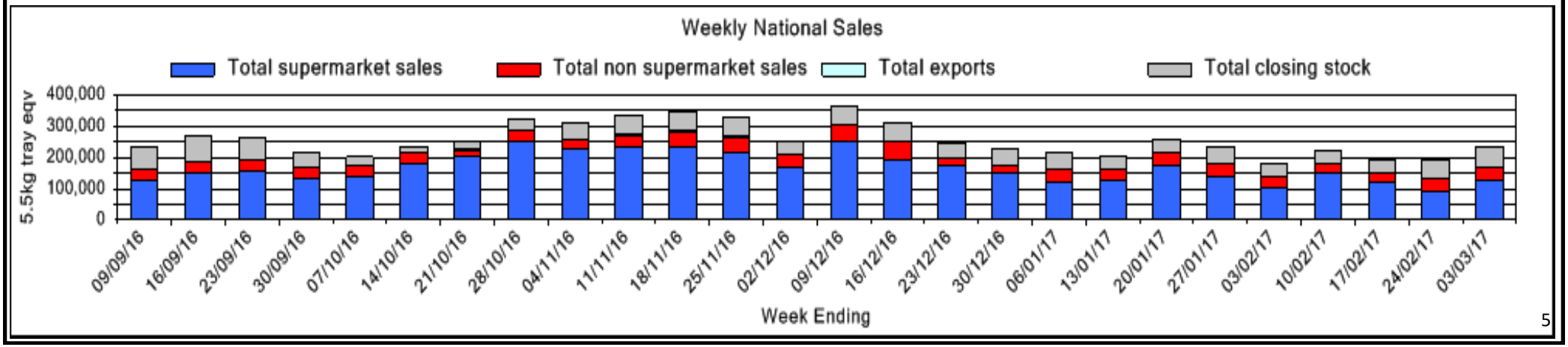
Green Skin Avocados (Consolidator)
Mackays Banana Marketing Co (Consolidator)
Natures Fruit Company (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Sunfresh (Consolidator)
The Avolution (Consolidator)
Donovan Family Investment Trust (CQ)
Costa Avocados/SuperPak (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Avocado Industry Council (NZAGA)
Cobra Hill Orchards (NQ)
Avocado Estates (NQ)
Battistin Orchards Pty Ltd (NQ)
Koci Avocado's (NQ)
Gunnado Farm (NQ)
Aussie Orchards Growers & Packers Mutchilba (NQ)
Avocados with Altitude (NQ)
Golden Triangle Avocados (NQ)
Hilltop Mareeba (NQ)
Willow Creek (WA)
Mariners Rest (WA)
Delroy Orchards (WA)
CNSW: Less than 3 Packhouse Contributors
SQ: Less than 3 Packhouse Contributors

Week 9 Contributors - Wholesalers

Alfred E Chave Pty Ltd (Brisbane)
Allcrops Pty Ltd (Sydney)
Costa Farms (Adelaide)
Costa Farms (Melbourne)
Etherington (Perth)
Favco Queensland Pty Ltd (Brisbane)
Fresh Choice WA Pty Ltd (Perth)
LaManna Premier Group (Melbourne)
Murray Bros (Brisbane)
N & A Fruit Distributors Pty Ltd (Sydney)
Sinclair & Antico (Aust) Pty Ltd (Sydney)
The La Manna Group (Adelaide)
The La Manna Group (Brisbane)
The La Manna Group (Sydney)
United Fresh (Adelaide)
VB Sculli (Melbourne)
WA Farm Direct (Perth)

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

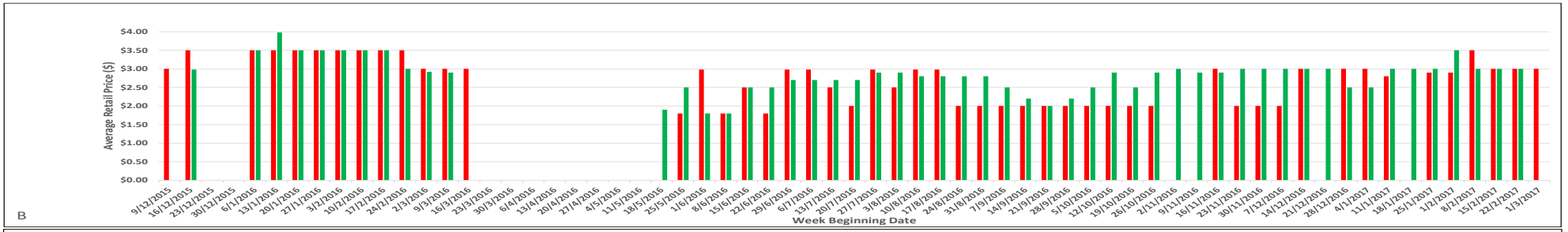
	Trays 5.5kg eqv (incl. Mod6 & P84)				Bulk 10Kg Cartons					Pre-Pack Kg					Total (5.5Kg Eqv)			
	Hass	Shepard	Other	Total	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total	5.5Kg Eqv	Hass	Shepard	Other	Total
NSW																		
Total supermarket sales		26,334		**26,334**	96	500		596	**1,084**						175	27,243		**27,418**
Total non supermarket sales	1,127	3,826		**4,953**	122	1,588		1,710	**3,109**						1,349	6,713		**8,062**
Total exports																		
Total sales	**1,127**	**30,160**		**31,287**	**218**	**2,088**		**2,306**	**4,193**						**1,523**	**33,956**		**35,480**
Total Stock on Hand	**2,153**	**5,296**		**7,449**	**117**	**110**		**227**	**413**						**2,366**	**5,496**		**7,862**
QLD																		
Total supermarket sales	5,286	49,065		**54,351**		4,571		4,571	**8,311**		35		35	6	5,286	57,382		**62,668**
Total non supermarket sales		3,699		**3,699**		307		307	**558**							4,258		**4,258**
Total exports		250		**250**												250		**250**
Total sales	**5,286**	**53,014**		**58,300**		**4,878**		**4,878**	**8,869**		**35**		**35**	**6**	**5,286**	**61,890**		**67,176**
Total Stock on Hand	**26,652**	**2,297**		**28,949**		**11**		**11**	**20**						**26,652**	**2,317**		**28,969**
SA & TAS																		
Total supermarket sales	539	5,534		**6,073**											539	5,534		**6,073**
Total non supermarket sales	1,321	4,832	903	**7,056**	310	815	8	1,133	**2,060**						1,885	6,314	918	**9,116**
Total exports																		
Total sales	**1,860**	**10,366**	**903**	**13,129**	**310**	**815**	**8**	**1,133**	**2,060**						**2,424**	**11,848**	**918**	**15,189**
Total Stock on Hand	**2,150**	**7,893**	**1,059**	**11,102**	**104**	**480**	**43**	**627**	**1,140**						**2,339**	**8,766**	**1,137**	**12,242**
VIC																		
Total supermarket sales	2,252	21,635		**23,887**	21	500		521	**947**						2,290	22,544		**24,834**
Total non supermarket sales	10,249	4,246		**14,495**	1,210	713		1,923	**3,496**						12,449	5,542		**17,991**
Total exports																		
Total sales	**12,501**	**25,881**		**38,382**	**1,231**	**1,213**		**2,444**	**4,444**						**14,739**	**28,086**		**42,826**
Total Stock on Hand	**4,216**	**4,126**		**8,342**	**438**	**934**		**1,372**	**2,495**						**5,012**	**5,824**		**10,837**
WA																		
Total supermarket sales	6,488			**6,488**	244			244	**444**	151			151	**27**	6,959			**6,959**
Total non supermarket sales	2,674			**2,674**	403			403	**733**						3,407			**3,407**
Total exports																		
Total sales	**9,162**			**9,162**	**647**			**647**	**1,176**	**151**			**151**	**27**	**10,366**			**10,366**
Total Stock on Hand	**3,267**			**3,267**	**107**			**107**	**195**						**3,462**			**3,462**
Total																		
Total supermarket sales	14,565	102,568		**117,133**	361	5,571		5,932	10,785	151	35		186	**34**	15,249	112,703		**127,952**
Total non supermarket sales	15,371	16,603	903	**32,877**	2,045	3,423	8	5,476	9,956						19,089	22,827	918	**42,834**
Total exports		250		**250**												250		**250**
Total sales	**29,936**	**119,421**	**903**	**150,260**	**2,406**	**8,994**	**8**	**11,408**	**20,742**	**151**	**35**		**186**	**34**	**34,338**	**135,781**	**918**	**171,036**
Total Stock on Hand	**38,438**	**19,612**	**1,059**	**59,109**	**766**	**1,535**	**43**	**2,344**	**4,262**						**39,831**	**22,403**	**1,137**	**63,371**



Online Retail Pricing Report for Single Hass Fruit for Week Beginning Wednesday, 1st March 2017 (Week 9)

Key: Coles online Woolworths online

Brisbane



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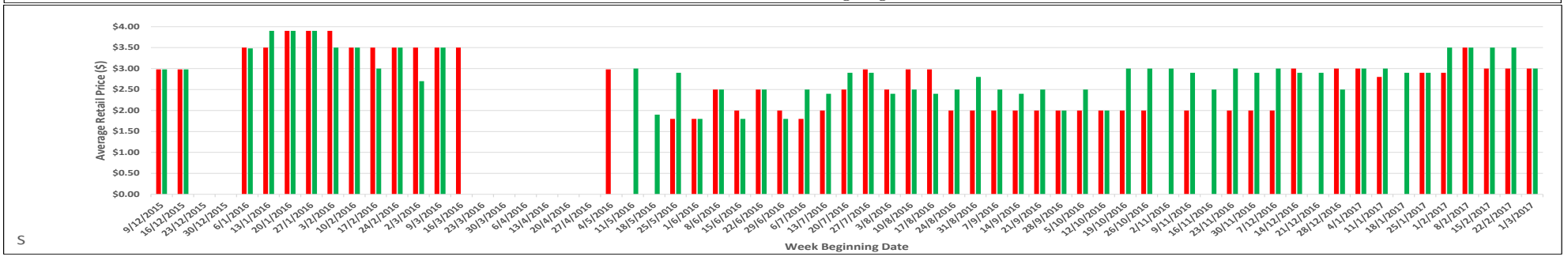
Sydney



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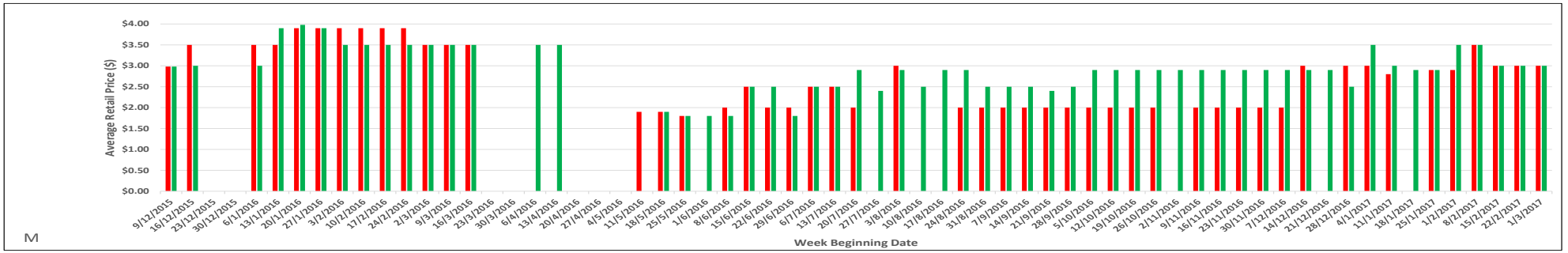
Melbourne



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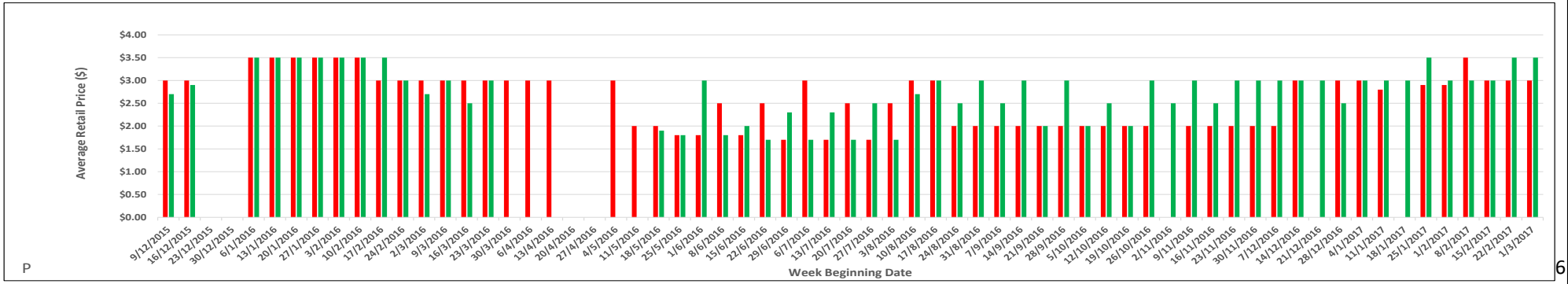
Perth



P

Single Fruit, Multi-buy and Pack Pricing for Week Beginning - Wed, 1st March 2017 (Week 9)

Coles	Variety	Pack Type	Description	Brisbane	Sydney	Melbourne	Perth
	Hass	*Single Fruit*		$3.00*	$3.00*	$3.00*	$3.00*
	Hass	*Multi-buy*	*2 for $x*	-	-	-	-
	Shepard	*Single Fruit*		-	-	-	-
	Shepard	*Multi-buy*	*2 for $x*	-	-	-	-
	*Unknown***	*Single Fruit*	*Organic*	-	-	-	-
	*Unknown***	*2 Pack*	*Organic*	-	-	-	-
	Hass	*3 Pack*		-	-	-	-
Woolworths	*Hass*	*Single Fruit*		-	↓$3.00	$3.00	$3.50
	Hass	*Multi-buy*	*3 for $x*	-	↓2 for $5	2 for $5	-
	Shepard	*Single Fruit*		$3.00	$3.00	-	-
	Shepard	*Multi-buy*	*2 for $x*	2 for $5*	2 for $5	-	-
	*Unknown***	*Single Fruit*	*Organic*	-	-	-	-
	*Unknown***	*2 Pack*	*Organic*	-	-	-	$7.00
	*Unknown***	*2 Pack*	*Ripe*	-	-	-	-
	Hass	*3 Pack*		$4.90	$5.70	$5.90	$7.90
	*Unknown***	*5 Pack*	*Mini Disney*	-	-	-	$7.90
	*Unknown***	*1kg Bag*	*Odd Bunch*	-	-	-	-

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

***denotes variety not indicated in online shopping offer*

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

(Yellow) = *same price as previous week*

(Red) +↓ = *decrease in price from previous week*

Catalogue Offers

Aldi - National - No catalogue offers found

Coles - Brisbane - Qld Shepard - Multi-buy - 2 for $5.00

Coles - Sydney - Qld Shepard - Multi-buy - 2 for $5.00

Coles - Melbourne - Qld Shepard - Multi-buy - 2 for $5.00

Woolworths - Brisbane - Qld Shepard - Single fruit - $3.00 - Multi-buy - 2 for $5.00

Foodworks - Brisbane - Shepard - Multi-buy - 2 for $4.00

IGA - Brisbane - Aust Shepard - Multi-buy - 2 for $5.00

IGA - Sydney - Aust Shepard - Single fruit - $2.99

Availability of Retail Price Data:

01/03/17 (Wk9)

Please note that Woolworths online prices for Hass single fruit purchases in Brisbane were unavailable for week 9

18/01/2017 (Wk3)

Please note that Coles online prices for Hass single fruit purchases in all states were unavailable for week 3.

28/12/16 (Wk53) & 04/01/17 (Wk1)

Please note that Due to Christmas holidays, only single-unit prices were collected.

21/12/16 (Wk52)

Please note that Coles online prices for Hass single fruit purchases in all states were unavailable for week 52.

16/11/16 (Wk47)

Please note that Coles online prices for Hass single fruit purchases in Sydney were unavailable for week 47.

09/11/16 (Wk46)

Please note that Coles online prices for Hass single fruit purchases in Brisbane were unavailable for week 46.

02/11/2016 (Wk45)

Please note that Coles online prices for Hass single fruit purchases in all states were unavailable for week 45.

27/07/16 (Wk31), 10/08/16 (Wk33) & 17/08/16 (Wk34)

Please note that Coles online prices for Hass single fruit purchases in Melbourne were unavailable for week 31, 33,& 34.

15/06/16 (Wk25), 22/06/16 (Wk26) & 29/06/16 (Wk27)

Please note that Woolworths online prices for Hass single fruit purchases in Melbourne differed depending on the store location. In the graph we have shown the higher price. For details of pricing in a given week please refer to previous reports.

Other information

Note: Online catalogues are published by major retailers each Wednesday.

Prices published in this report are reflective of online shopping and catalogue prices from Wednesday to Tuesday.