Infocado weekly report

Week 29 - 2019 (13 - 19 July 2019)

Comments:

South Qld, Tamborine/Northern Rivers, Tri State & Northern WA packers: please start entering your 4week forecasts if your season is about to start in July and August. For quality assurance, please remind growers before picking to **ensure dry matter of at least 23% for Hass.**

Week 29 - 2019 summary:

- Total dispatch was 417,825 trays, a 28% increase on the previous week and 22% higher than the forecasted 342,962 trays.
- Central Queensland supplied the majority of fruit at 63%, followed by Central NSW at 15%, South Qld at 9% and North Qld at 6%. The remaining 8% of fruit was supplied by Sunshine Coast, Tri State & Tamborine/Northern Rivers .
- The average online single avocado price for the reported week is $2.26, a 4¢ decrease on the previous week—see pp.6, 7 & 8.
- This is a record dispatch for Infocado as the volume supplied into the Australian market is even slightly higher than the highest recorded dispatch in 2018 (week 46).
- Unfortunately, there is still a significant weekly dispatch and forecast variance which highlights that it is very important for Packhouses/ Consolidators to review their 4 weekly forecast each week to make sure conditions haven't changed that will affect upcoming dispatches.

Marketing Update: Getting tasty

From March to May this year, Australian Avocados partnered with taste.com.au to feature avocado recipe content. Avocados featured in three Taste TV videos which were viewed more than 114,000 times, had three recipe galleries which had more than 36,000 page views, and were featured in a variety of recipes which had combined page views of over 36,000. Highlights included articles detailing how avocados can transform cooking and a panko-crusted avocado Japanese noodle salad recipe. 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 31 September, report will be distributed on Wednesday instead of Tuesday.

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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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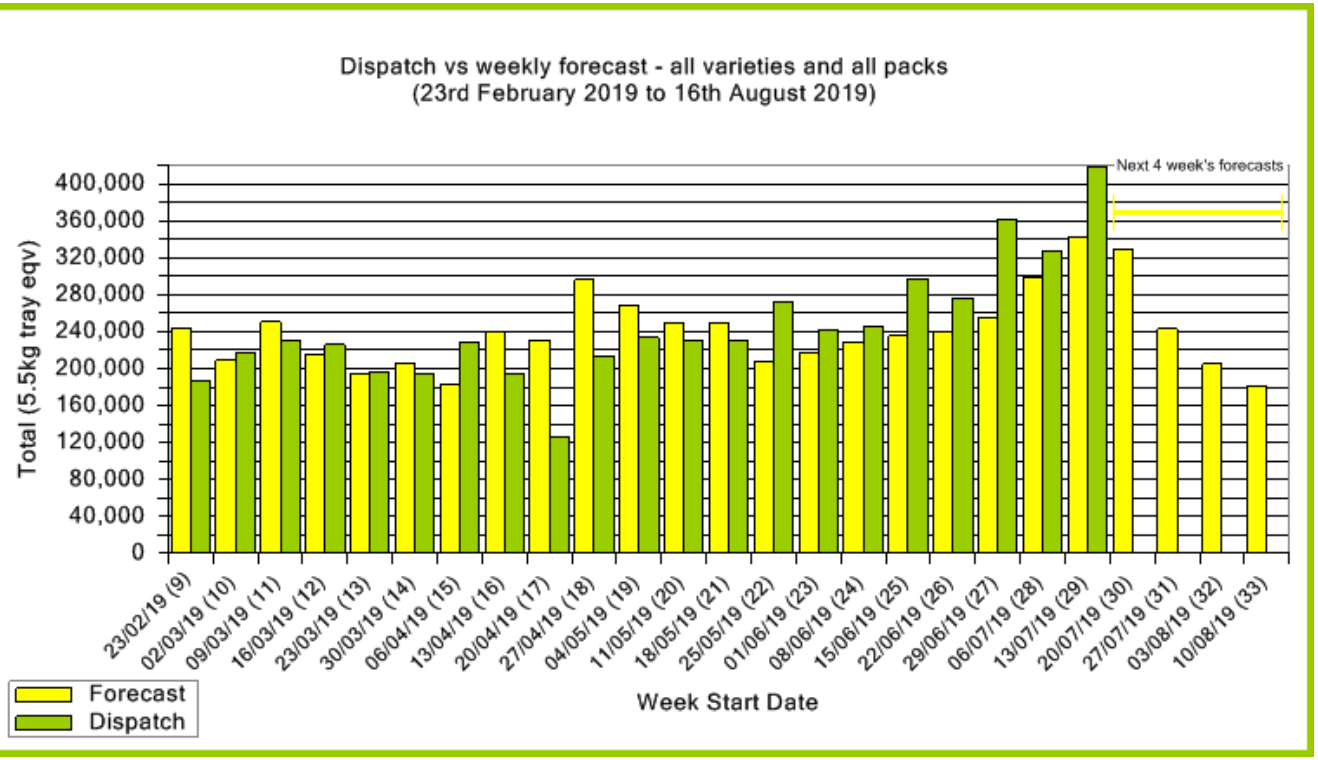
Yellow shading indicates forecast data

Forecast Data (Week 29 - 33)					
Variety	Trays - Total	Bulk	P/Pk	Proc	All - Total
	5.5Kg Eqv	10Kg	Kg	Kg	5.5Kg Eqv
Week 29 - begin 13/07/2019					
Hass	303,641	21,166	400	4,200	**342,962**
Week Total	**303,641**	**21,166**	**400**	**4,200**	**342,962**
Week 30 - begin 20/07/2019					
Hass	293,152	19,440	400	6,200	**329,697**
Week Total	**293,152**	**19,440**	**400**	**6,200**	**329,697**
Week 31 - begin 27/07/2019					
Hass	216,520	14,150	400	6,200	**243,447**
Week Total	**216,520**	**14,150**	**400**	**6,200**	**243,447**
Week 32 - begin 03/08/2019					
Fuerte	500	200			**864**
Hass	186,420	9,700	400	200	**204,165**
Week Total	**186,920**	**9,900**	**400**	**200**	**205,029**
Week 33 - begin 10/08/2019					
Hass	146,450	8,350	400		**161,705**
Reed	20,000				**20,000**
Week Total	**166,450**	**8,350**	**400**		**181,705**

Green shading indicates dispatch data

Dispatch Data (Week 29 - begin 13/07/2019)						
Variety	Trays	Bulk	P/PK	Proc	Other	5.5Kg Eqv
	5.5Kg Eqv	10Kg	Kg	Kg	Kg	Total Trays
Fuerte		192				**349**
Gem	1,004	100				**1,186**
Hass	347,675	35,027	10,957	10,427	1,991	**415,610**
Sharwil	88	419				**850**
Total	**348,597**	**35,738**	**10,957**	**10,427**	**1,991**	**417,995**



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]								**N/A - these forecasts are updated monthly**
Dispatch volume Infocado [1]								
Customs Data of NZ avocado exports [2]								

[1] Source: Infocado [2] Source: IHS GTA (based on ABS data) **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 : 13th July - 19th July 2019 (Wk 29)															
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		917	2,311	10,244		13,856	11,569	10,517	5,697	**55,111**	4,394				**63,100**
Central Qld	9	20,087	35,622	64,061		35,205	43,554	17,021	10,006	**225,565**	18,915		9,601	1,991	**262,064**
North Qld	579	5,890	3,389	5,819		2,809	665	1,069		**20,220**	489	10,557	826		**23,178**
South Qld	285	820	1,502	6,094	1,032	4,787	7,867	4,886	1,286	**28,559**	4,015				**35,859**
Sunshine Coast	50	187	1,209	2,431	62	3,868	6,037	3,965	646	**18,455**	6,825				**30,864**
Tamborine/ Northern Rivers			2	45	27	89	155	189		**507**	74	400			**715**
Tri State				35		75	100	140		**350**	1,026				**2,215**
	923	**27,901**	**44,035**	**88,729**	**1,121**	**60,689**	**69,947**	**37,787**	**17,635**	**348,767**	**35,738**	**10,957**	**10,427**	**1,991**	**417,995**

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 : 13th July - 19th July 2019 (Wk 29)															
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									240	**240**	250				**695**
NSW	349	5,067	4,260	13,029	234	6,341	8,977	5,372	8,501	**52,130**	9,227	400		286	**69,031**
QLD	452	11,226	24,134	42,143	554	34,135	34,837	18,903	6,678	**173,062**	19,176	10,557	10,427	320	**211,800**
SA / NT				15		195	2,004	2,500		**4,714**	568				**5,747**
TAS								160		**160**					**160**
VIC	122	11,287	10,504	31,368	333	17,878	19,166	5,764	2,216	**98,638**	5,320			1,385	**108,563**
WA		321	5,137	2,174		2,140	4,963	5,088		**19,823**	1,197				**21,999**
Total	**923**	**27,901**	**44,035**	**88,729**	**1,121**	**60,689**	**69,947**	**37,787**	**17,635**	**348,767**	**35,738**	**10,957**	**10,427**	**1,991**	**417,995**

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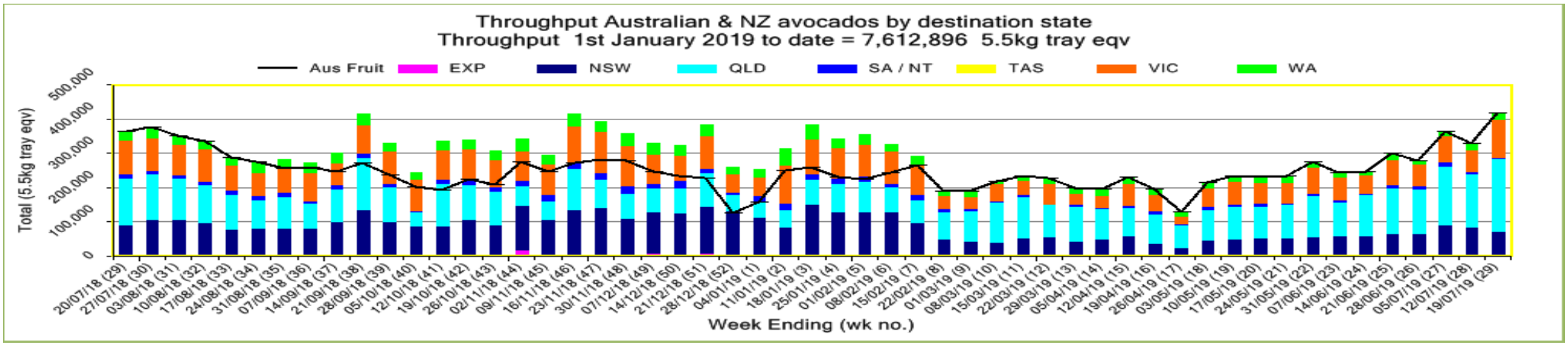
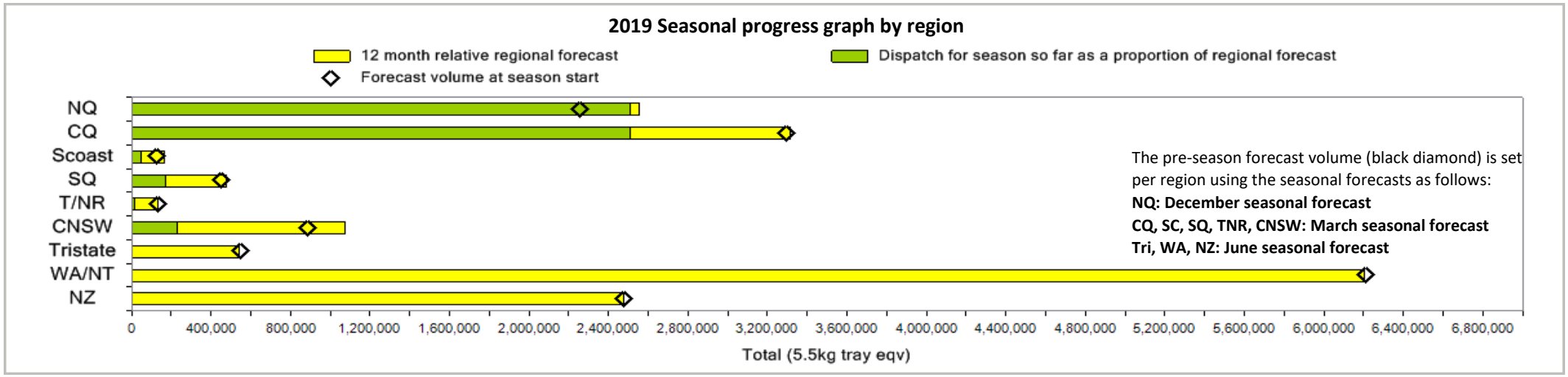


The **seasonal progress graph** below uses seasonal forecast data from direct contributors, it does not consider extrapolated figures that compensate for non-contributing packhouses, thus these figures may be lower than those shown on the seasonal (quarterly) report. The total of each bar in the graph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



Week 29 - 2019 Contributors - Packhouses

Costa Avocado (Consolidator)
Green Skin Avocados (Consolidator)
Natures Fruit Company (Consolidator)
Rockridge Fresh (Consolidator)
Simpson Farms Pty Ltd (Consolidator)
Sunfresh (Consolidator)
Donovan Family Investment Trust (CQ)
Lava Valley Produce (CQ)
Sunny Bluff Produce Pty Ltd (CQ)
Sunnyspot Packhouse Pty Ltd (CQ)
Balmoral Orchard (SQ)
Googa Farms (SQ)
Green Nugget Orchards (SQ)
Sunnyspot Packhouse Pty Ltd (SQ)
Touchwood Farming (SQ)
Jirel Holdings (TNR)
T W Silver (TNR)
Zhong Sheng Pty Ltd (TNR)
CNSW: Less than 3 packhouse contributors
NQ: Less than 3 packhouse contributors
SC: Less than 3 packhouse contributors
TRI: Less than 3 packhouse contributors
WA: Less than 3 packhouse contributors

Week 29 - 2019 Contributors - Wholesalers

Costa Farms [Adelaide]
LaManna Premier Group [Adelaide]
United Fresh [Adelaide]
De Luca Banana Marketing Pty Ltd [Brisbane]
J.H.Leavy & Co [Brisbane]
Murray Bros [Brisbane]
Nutrano Produce Group [Brisbane]
Costa Farms [Melbourne]
LaManna Premier Group [Melbourne]
Etherington [Perth]
Fresh Choice WA Pty Ltd [Perth]
WA Farm Direct [Perth]
LaManna Premier Group [Sydney]
N & A Fruit Distributors Pty Ltd [Sydney]
Sinclair & Antico (Aust) Pty Ltd [Sydney]

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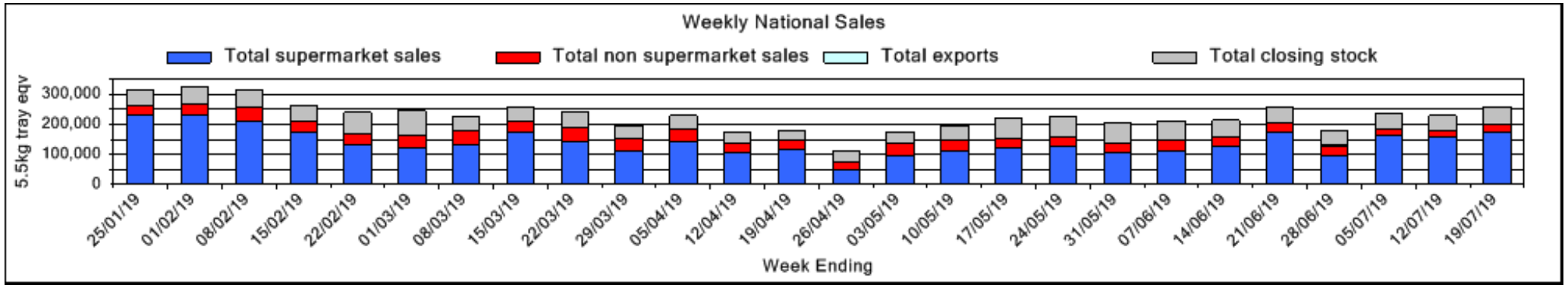
Sales report including direct sales from packhouses, wholesale sales and stock on hand at wholesale level

	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	27,598			27,598	40			40	73	400			400	73	27,743			27,743
Total non supermarket sales	85			85	179			179	325						410			410
Total exports																		
Total sales	27,683			27,683	219			219	398	400			400	73	28,154			28,154
Total Stock on Hand	930			930	14			14	25						955			955
QLD																		
Total supermarket sales	68,144			68,144	480			480	873	9,792			9,792	1,780	70,797			70,797
Total non supermarket sales	2,709			2,709	317	12		329	598						3,285	22		3,307
Total exports	240			240	250			250	455						695			695
Total sales	71,093			71,093	1,047	12		1,059	1,925	9,792			9,792	1,780	74,777	22		74,799
Total Stock on Hand	32,597	58		32,655	307	10	6	323	587						33,155	76	11	33,242
SA & TAS																		
Total supermarket sales	5,654			5,654											5,654			5,654
Total non supermarket sales	1,694			1,694	1,204			1,204	2,189						3,883			3,883
Total exports																		
Total sales	7,347			7,347	1,204			1,204	2,189						9,536			9,536
Total Stock on Hand	6,349			6,349	1,621			1,621	2,947						9,296			9,296
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	60,961			60,961	1,845			1,845	3,355						64,316			64,316
Total Stock on Hand																		
WA																		
Total supermarket sales	14,413			14,413											14,413			14,413
Total non supermarket sales	6,487			6,487	824			824	1,498						7,985			7,985
Total exports																		
Total sales	20,900			20,900	824			824	1,498						22,398			22,398
Total Stock on Hand	7,568			7,568	129			129	235						7,803			7,803
Total																		
Total supermarket sales	171,686			171,686	696			696	1,265	10,192			10,192	1,853	174,804			174,804
Total non supermarket sales	16,059			16,059	4,193	12		4,205	7,645						23,682	22		23,704
Total exports	240			240	250			250	455						695			695
Total sales	187,984			187,984	5,139	12		5,151	9,365	10,192			10,192	1,853	199,181	22		199,203
Total Stock on Hand	53,779	58		53,837	2,442	10	6	2,458	4,469						58,219	76	11	58,306



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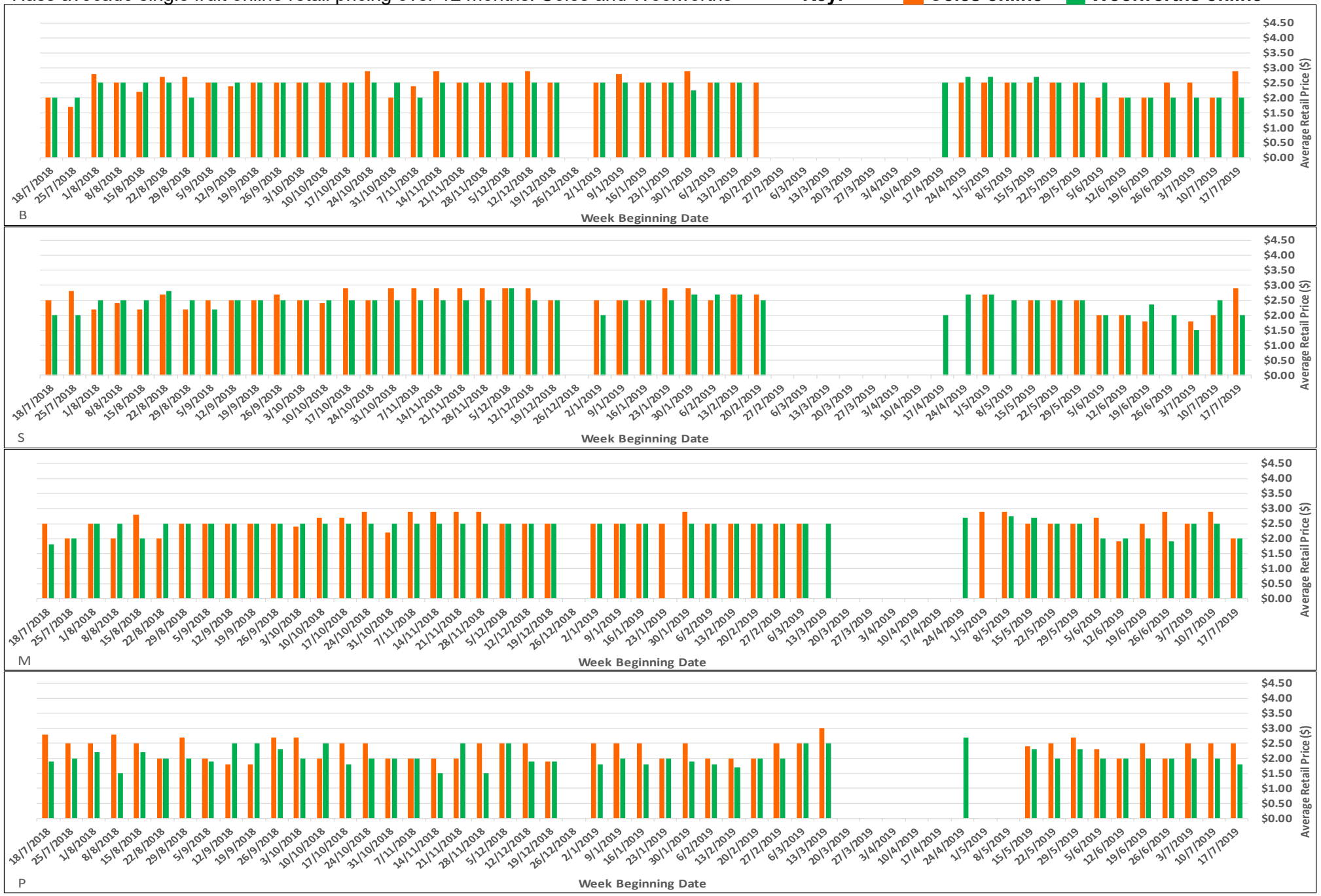
Hass avocado single fruit online retail pricing over 12 months: Coles and Woolworths **Key:** **Coles online** **Woolworths online**



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Avocado online retail pricing for Coles and Woolworths

Reporting period: week 29-2019 (Wed 17/07/19 - Tue 23/07/19)

	Pack Type	Variety	Description	Brisbane	Sydney	Melbourne	Perth
Coles	Single fruit	Hass		$2.90 ↑	$2.90 ↑	$2.00 ↓*	$2.50
	Multi-buy	Hass			2 for $5		2 for $5
	Single fruit	Shepard				$2.00 ↓*	
	Multi-buy	Shepard					
	5 pack	not indicated		$4.90 ↓*		$4.90 ↓*	
	Organic Single fruit	not indicated					
	Organic 2 pack	not indicated					
Woolworths	Single fruit	Hass		$2.00 *	$2.00 ↓*	$2.00 ↓*	$1.80 ↓*
	Multi-buy	Hass					
	Single fruit	Shepard					
	3 pack	not indicated		$5.00	$5.00	$5.00	$5.50
	1kg Punnet	not indicated	Odd Bunch	$5.50 ↓*	$5.50 ↓*	$6.00 ↓*	$6.50
	Organic 2 pack	Hass					
	Bundle of 20	Shepard					
	Bundle of 20	Hass		$47.50	$47.50	$47.50	$47.50
Single fruit average by city (all varieties, excluding organic)				$2.45 ↑	$2.45 ↑	$2.00 ↓	$2.15 ↓
Single fruit average (all varieties, excluding organic)			$2.26 ↓				

Catalogue offers on avocados:

Coles - Melbourne: Australian Hass $2.00 each

Woolworths - National: No catalogue offers

Aldi - National: No catalogue offers

Foodworks - Perth: Australian Hass $1.99 each

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

17/07/19 (Week 29)
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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