

THE AUSTRALIAN FOODSERVICE MARKET FOR AVOCADOS

MARKET INSIGHTS



Private report prepared for Hort Innovation
July 2019



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INTRODUCTION





This report emanates from the market research study 'The Australian Foodservice Market for Avocados, Mushrooms & Onions' conducted by Food Industry Foresight Pty Ltd during the 1st & 2nd Quarter of 2019.

For each of the three produce categories, the two overriding research objectives were:

- i. To determine total market size by commercial and institutional foodservice channel in volume & value and by product type
- ii. To provide detailed market insights into:
 - Foodservice trends & developments
 - The use of the produce in question in foodservice operators' menu offerings at different meal segments
 - Distribution & main sources of supply
 - The importance of country of origin
 - Foodservice operators' quality perceptions of Australian grown produce





In summary, the research study is based upon:

- i. Qualitative interviews
- ii. A quantitative survey according to a statistically correct sample & sample structure for the Australian Foodservice market; utilising a structured questionnaire
- iii. Primary collected data analysed by Food Industry Foresight's proprietary market size model

All research findings and analysis for each of the three produce categories are presented within two reports in PowerPoint format and one market size database presented in Excel.

Further study details are contained within our Proposal 'The Australian Foodservice Market for Avocados; Mushrooms & Onions'.



A close-up photograph of several avocado slices arranged on a wooden cutting board. The slices show the bright green flesh and dark green skin. The background is a blurred wooden surface.

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THE AUSTRALIAN FOODSERVICE MARKET FOR AVOCADOS



- ❖ The Australian Foodservice Market is unique among all other foodservice markets in the world with its plethora of cuisines we all call our own and the lack of a real national cuisine. The market is vibrant, dynamic and constantly evolving. It is the fastest changing food market in terms of market size.
- ❖ Over the past three to four decades, Australians have made eating out a way of life. While the last decade in the Australian Foodservice market has been the most volatile in its history, Australians still today have one of the highest propensities to eat out among Western nations. Eating out is part of the Australian fabric – eating out encompasses all socio-economic groups in this enormous country.
- ❖ The Australian palate is bold and open, and we eat out for breakfast, brunch, lunch and dinner.
- ❖ More than 8 billion meals are served in the Australian Foodservice market every year, and at the end of 2018, 77% of all Australians aged 14 years+ ate out on a regular basis, that is at least once per month.

For further information please see [FIF's Annual Trend Report for the Australian Foodservice market](#).



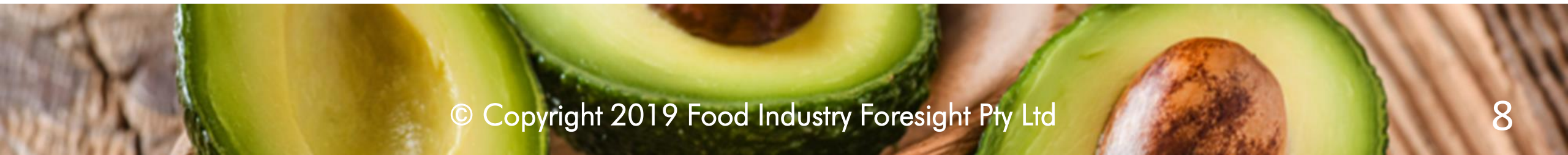
THE AUSTRALIAN FOODSERVICE MARKET FOR AVOCADOS



It is against this backdrop that opportunities for Avocados in the Australian Foodservice market should be analysed and evaluated.

In particular, foodservice operators' use of Avocados in their menu offering across all five meal segments have particularly benefitted from the following market trends and developments:

- Australians have long had the highest propensity among Western nations to eat out for Breakfast. However, generally it is also the first meal segment to suffer when times are tough. Despite falling living standards and no or little wage growth over the past years, Breakfast has showed a strong growth along with Brunch. These two meal segments continue to be the fastest growing segments. It has led to Restaurants moving from two main meal segments (lunch & dinner) per day to three; and Cafés expanding to two meal segments per day when previously mainly serving lunch guests.





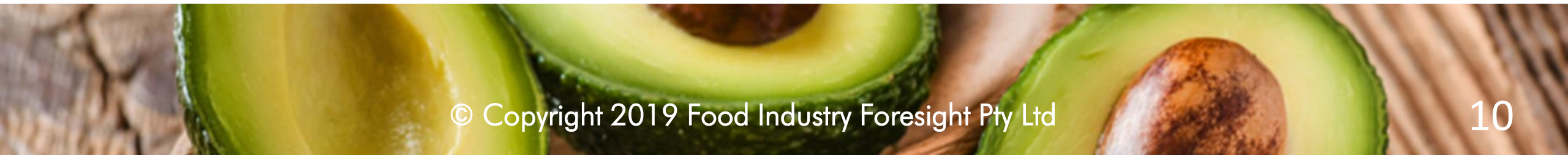
- The use of Avocados in the Australian Foodservice market has also increased as foodservice consumers now demand a totally different type of breakfast menu compared to just five to eight years ago. Operators are meeting this demand by including new and different ingredients – anything from new and different breads to grains, fruit and vegetables.
- We all know the ‘smashed avocado’ trend – a trend that is probably more of a fad. But it has been born out of the wish for interesting and new breakfast menus coinciding with the slow, underlying trend towards healthy eating among consumers of all ages. Avocados will remain on the menus, but as with the Hamburger, its star status in today’s market will wane.



THE AUSTRALIAN FOODSERVICE MARKET FOR AVOCADOS

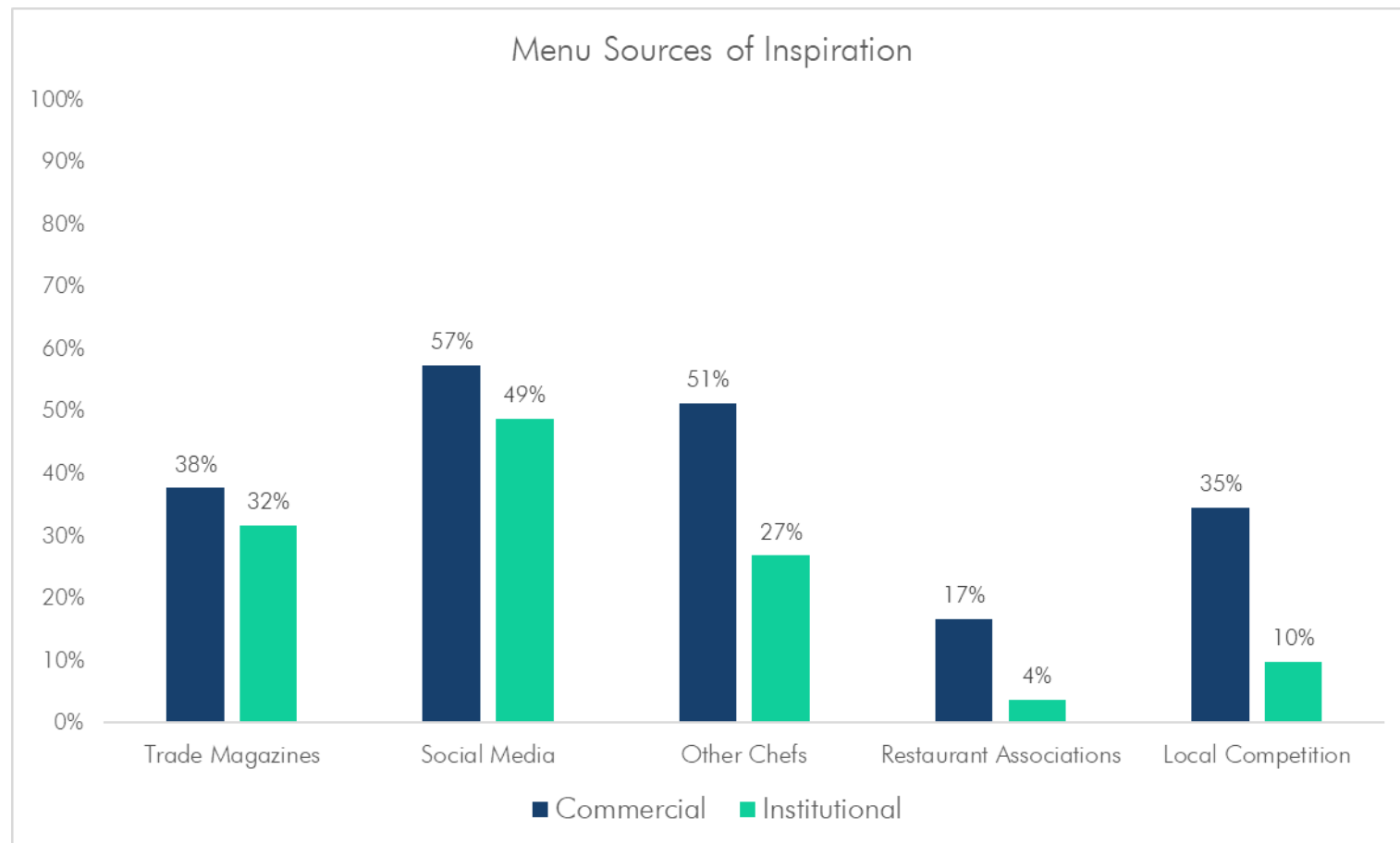


- Avocados have no substitute ingredient or ingredients 'competing' with its use.
- Avocados are therefore a 'unique' foodstuff, changing the flavour and mouth feel of a dish. In other words, a strong competitive advantage!
- The high nutritional value of Avocados is also widely recognised among commercial as well as institutional foodservice operators with use being driven both by them and the consumers.

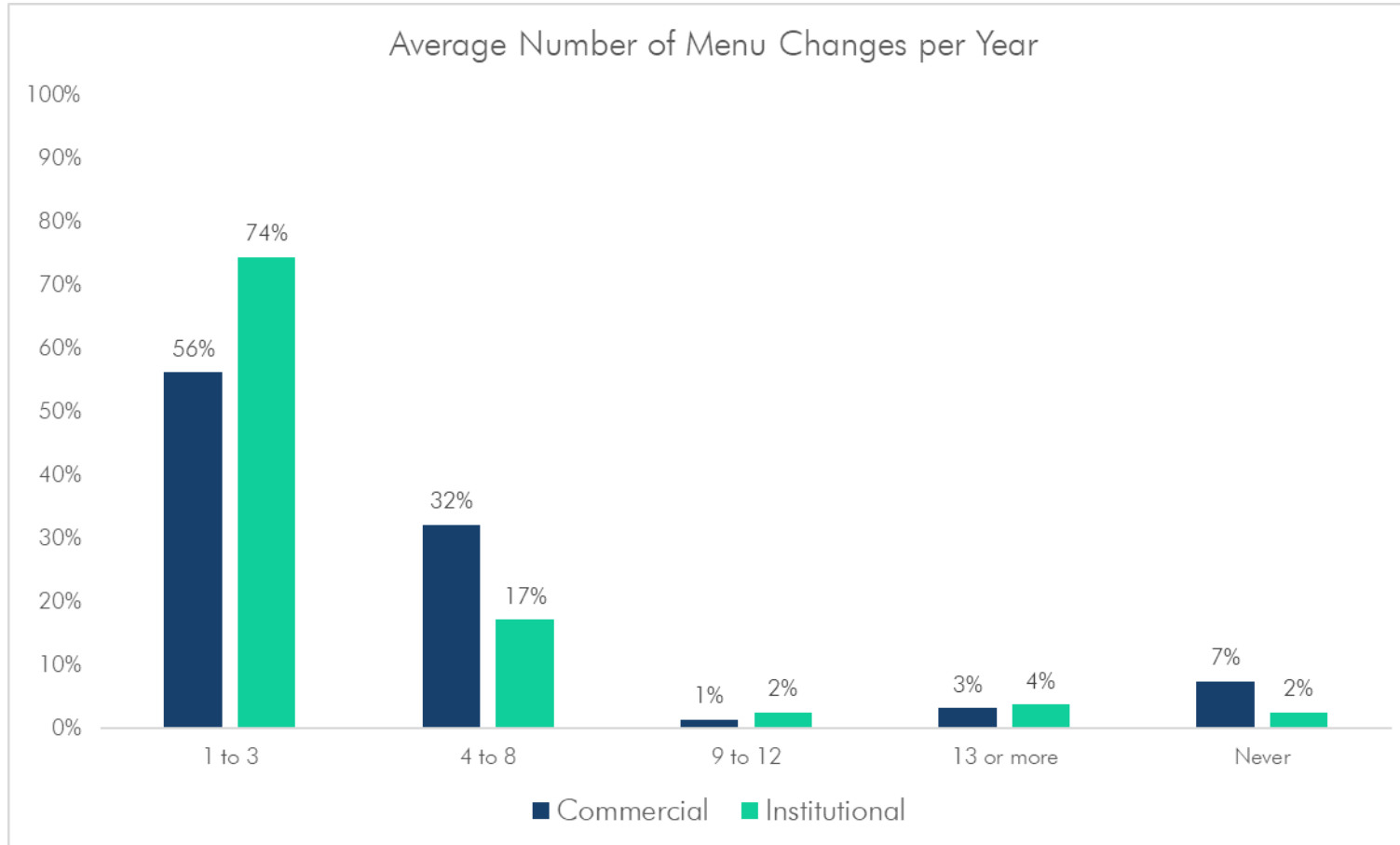


A close-up photograph of several slices of ripe avocado resting on a wooden cutting board. The avocado is cut into thick, crescent-shaped slices, revealing a bright green, buttery interior and a dark green, bumpy skin. The wooden board has a prominent grain pattern and is set against a blurred background of more wood. A teal banner with white text is overlaid across the middle of the image.

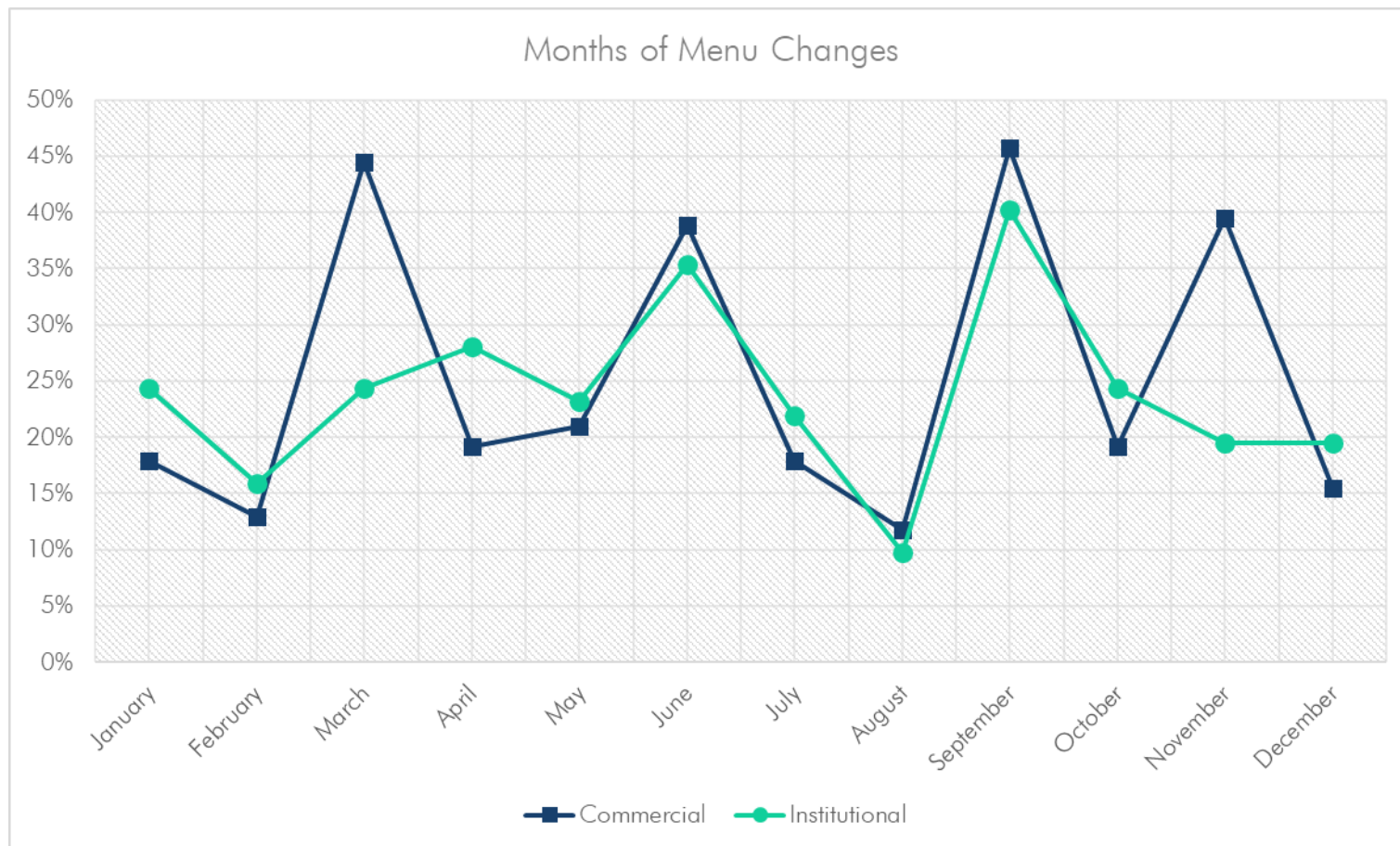
3 THE FOODSERVICE MENU



- ❖ The largest source of inspiration both in the Commercial & Institutional sector is Social Media.
- ❖ Within the Commercial sector 'Other Chefs' plays an important role in inspiring menus.
- ❖ In few other markets do word-of-mouth and personal relationships so strongly influence product choice as in the Commercial foodservice market. This entails all communication between suppliers and chefs/cooks as well as among chefs themselves.



❖ Not surprisingly, the average number of menu changes is between one & three followed by four to eight.

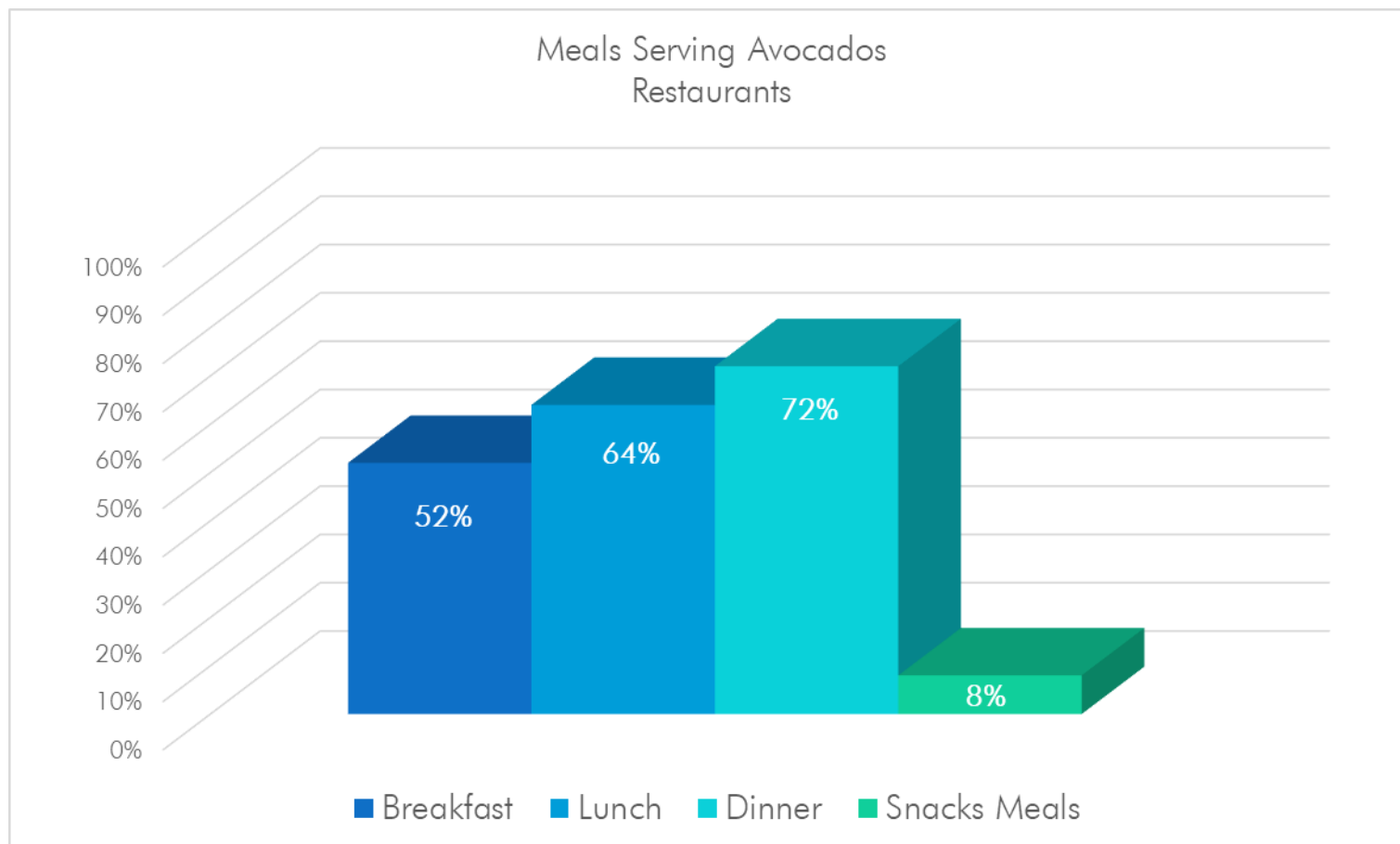


- ❖ The months that menus are changed are quite similar across both the Commercial and Institutional sector; with the exception of March and November, where the institutions make minimal menu changes compared with their commercial counterparts.

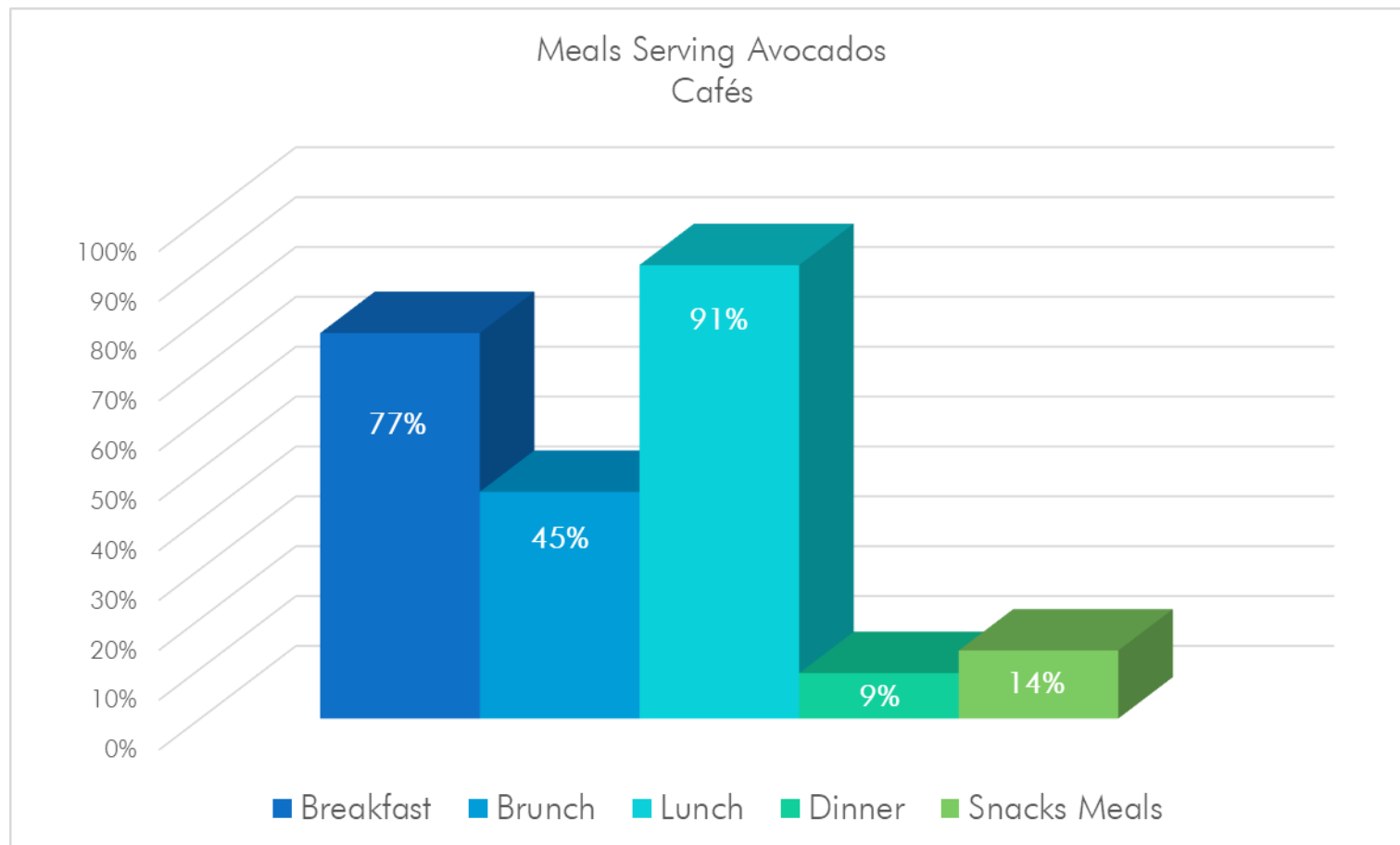
A close-up photograph of several avocado slices on a wooden cutting board. The slices are arranged in a row, showing the green flesh and dark green skin. The background is a blurred wooden surface.

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MEALS SERVING AVOCADOS

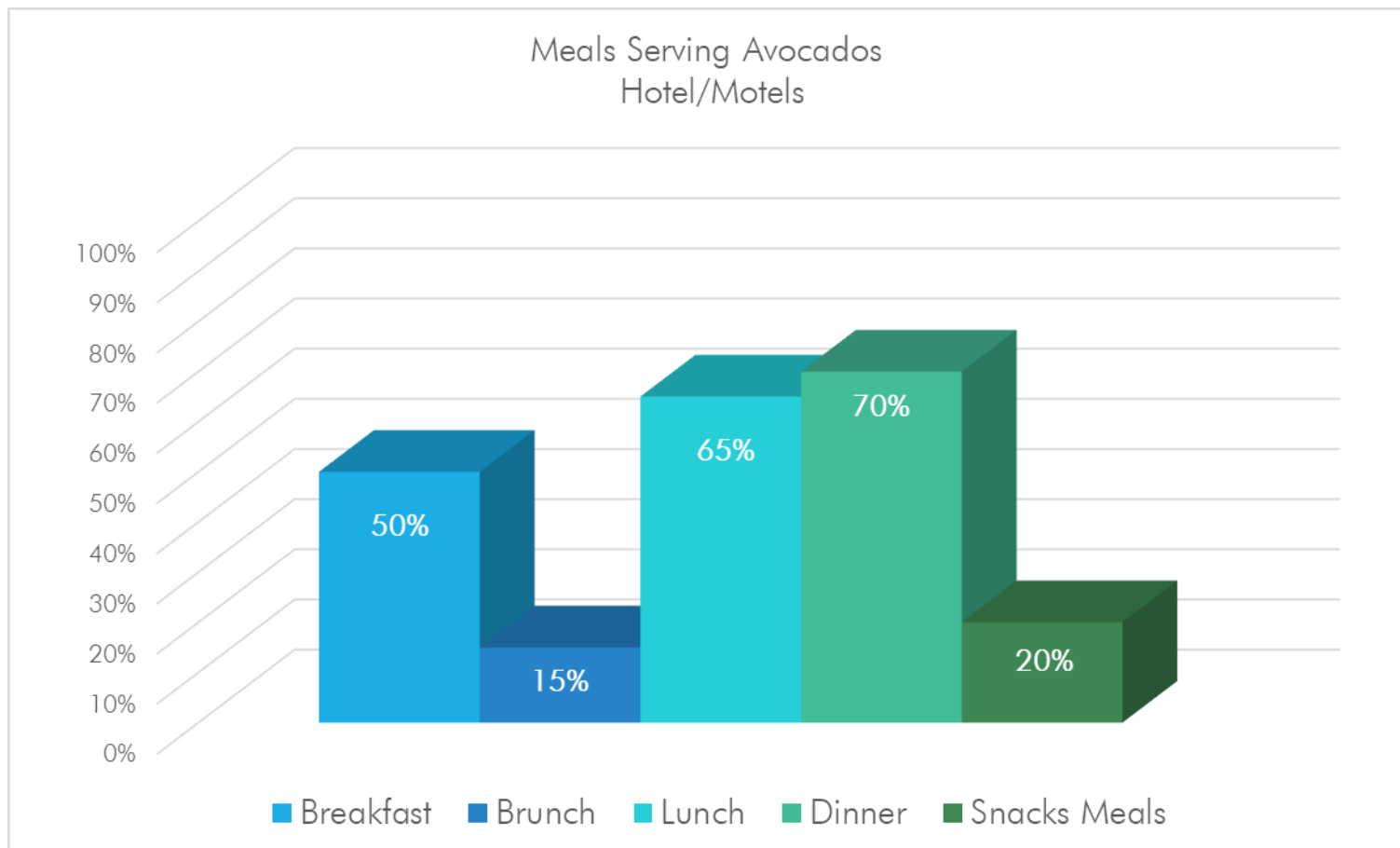


- ❖ Avocados are served across three of the meal segments in Restaurants.
- ❖ Restaurants that include Avocados in their Breakfast menu offerings is at 52% due to the growth of the Breakfast segment over the last few years.



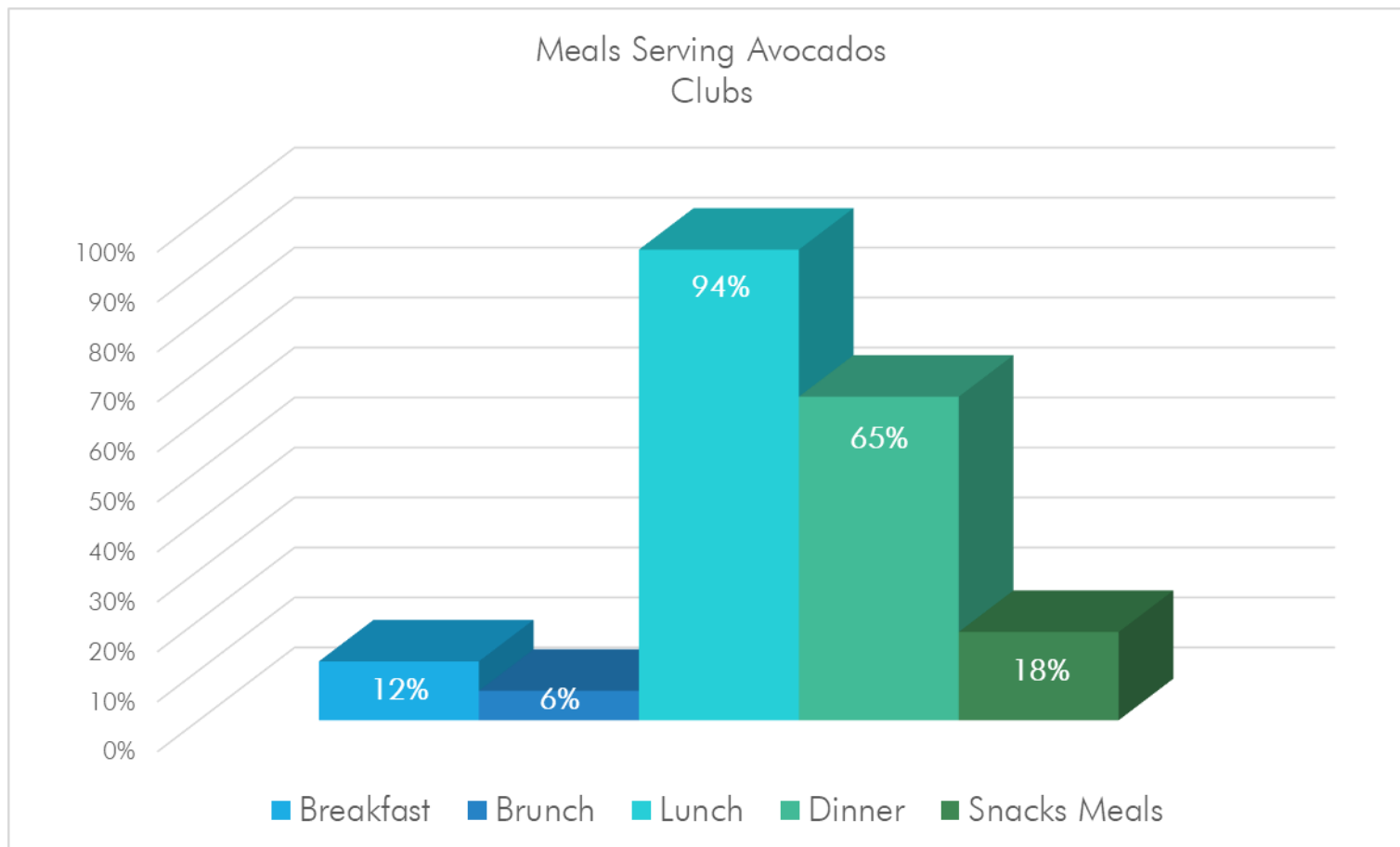
❖ Avocados are used in all five meal segments in the Café channel; with the following having significant presence in menus for Cafés:

- I. Lunch 91%
- II. Breakfast 77%

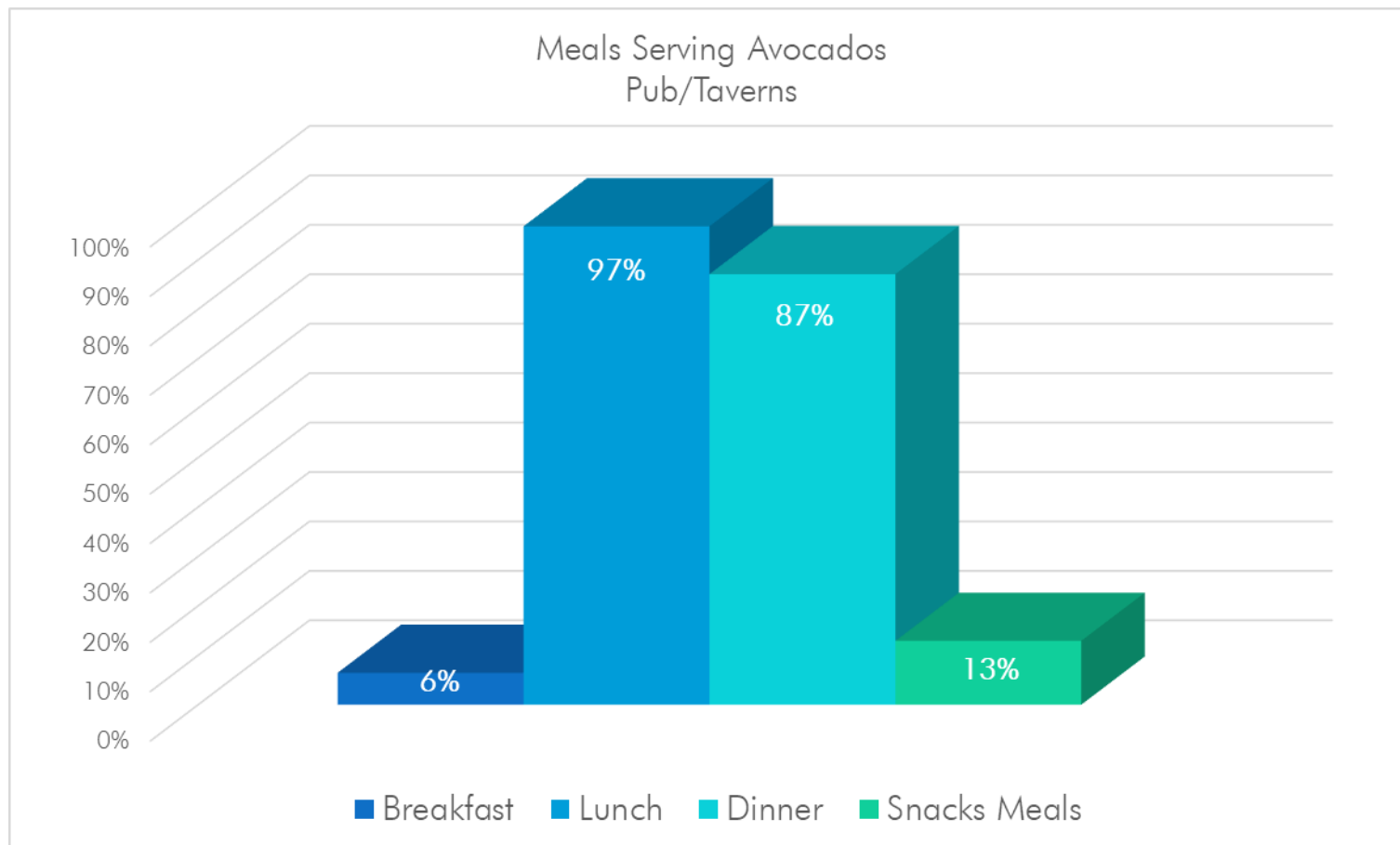


❖ Avocados are served across all five meal segments in Hotel/Motels with little variance in the number of outlets using them in their menu offerings for Lunch and Dinner as follows:

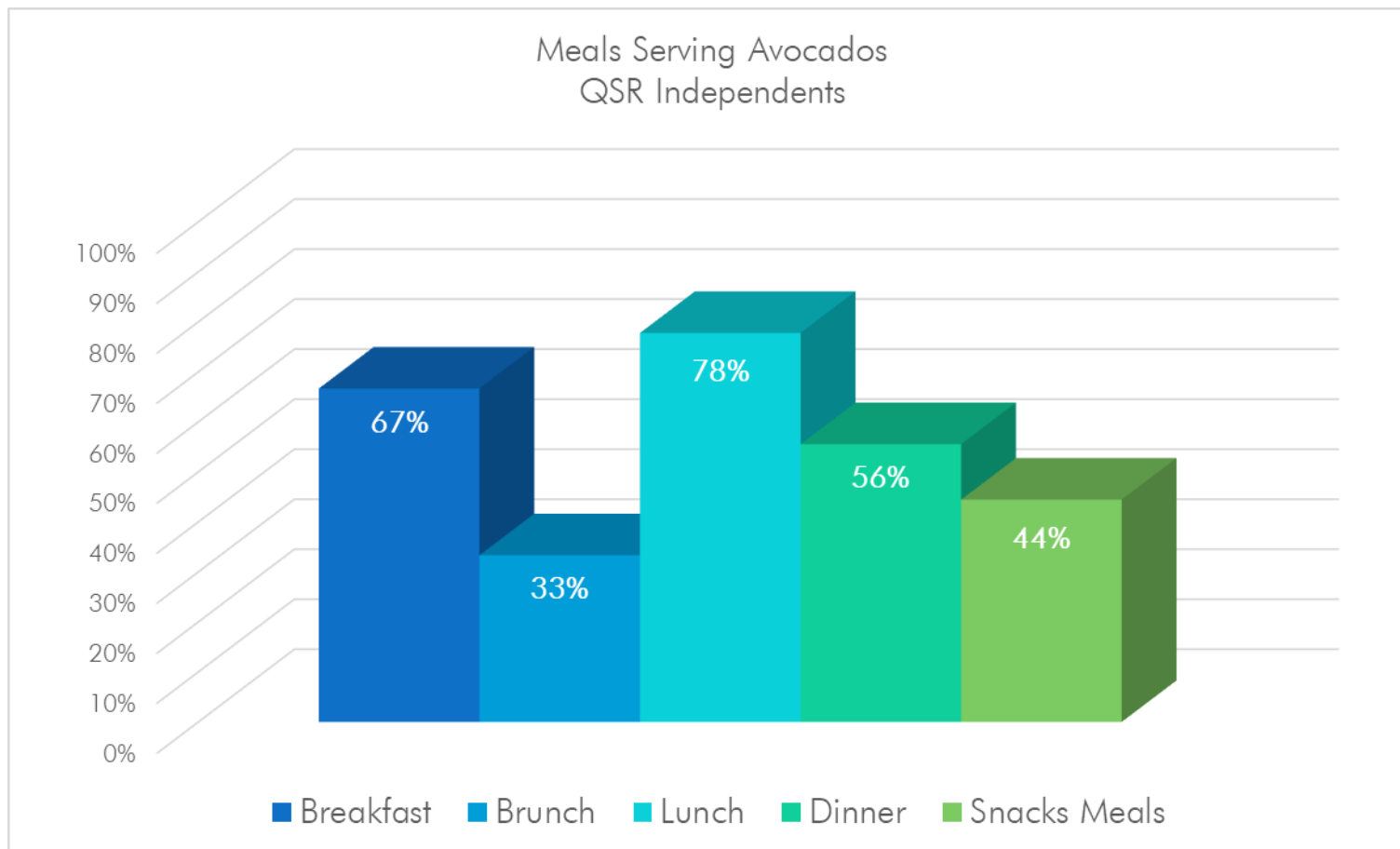
- I. Dinner 70%
- II. Lunch 65%



❖ Not surprisingly, given Lunch is the largest meal segment for Clubs, Avocados are served in 94% of outlets in their lunchtime menu offerings.



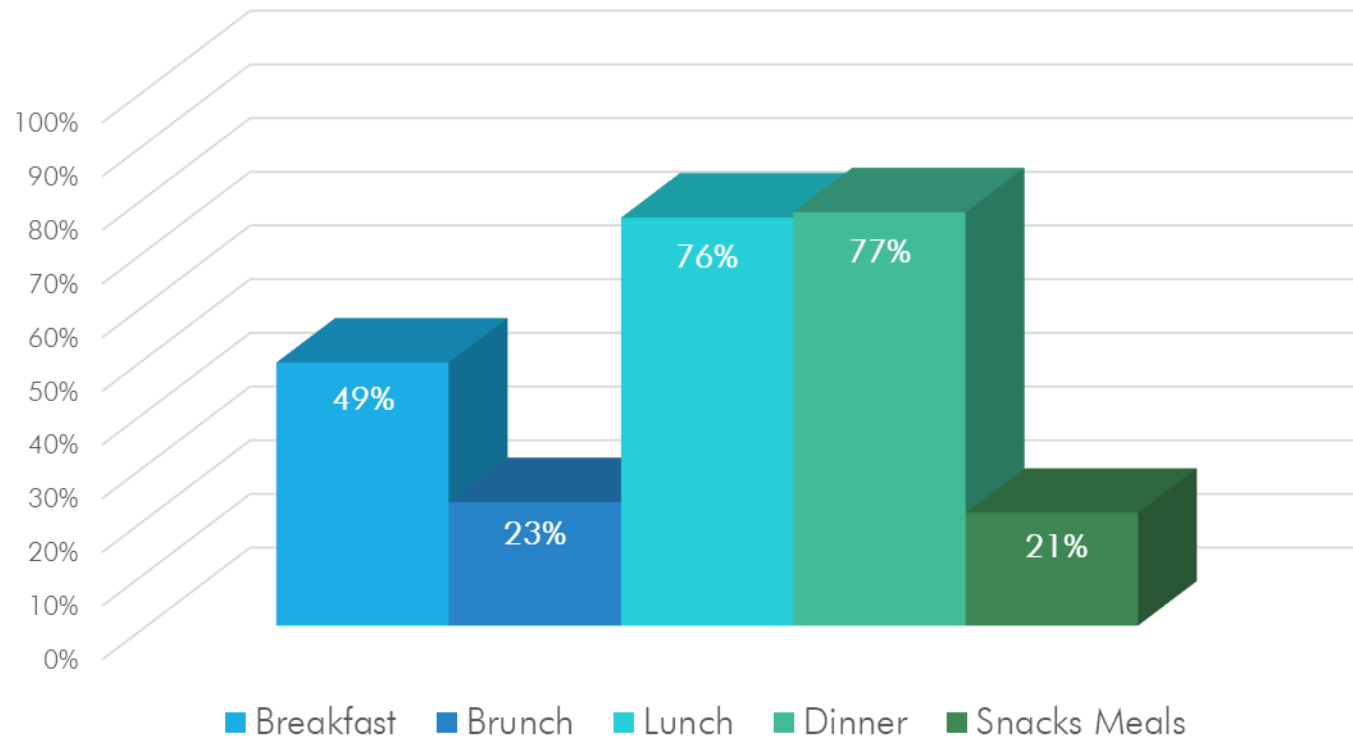
- ❖ The growth in popularity of Pub/Tavern meals over the last five years is reflected here showing the development of the Lunch menu for these outlets.



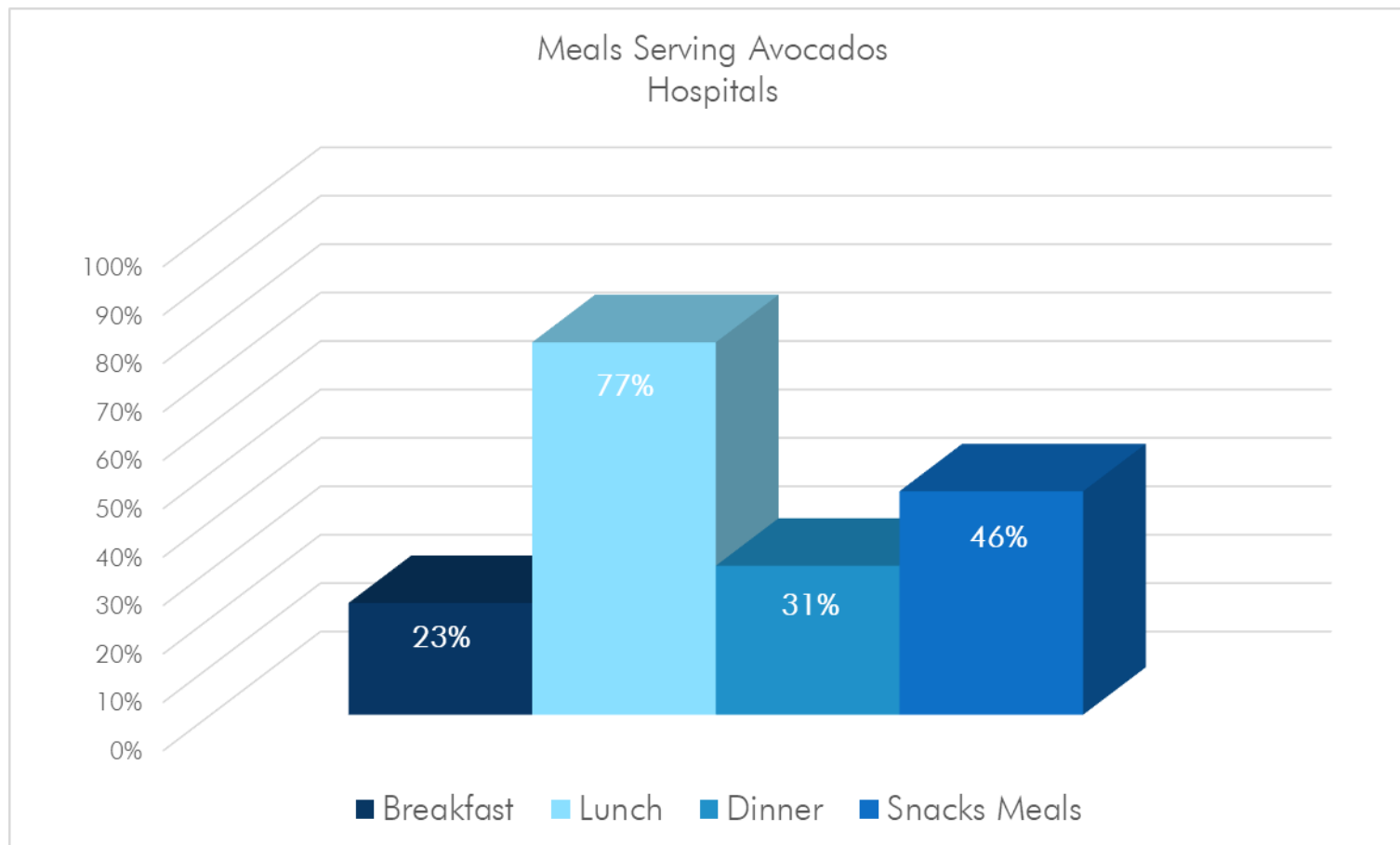
- ❖ Interestingly, a significant percentage of QSR Independents use Avocados in their menu offerings for Brunch and Snack Meals compared to other Commercial channels.
- ❖ However, meal segments are more difficult to define for QSR Independents as in most cases their menu offerings vary only slightly across the meal segments, if at all.



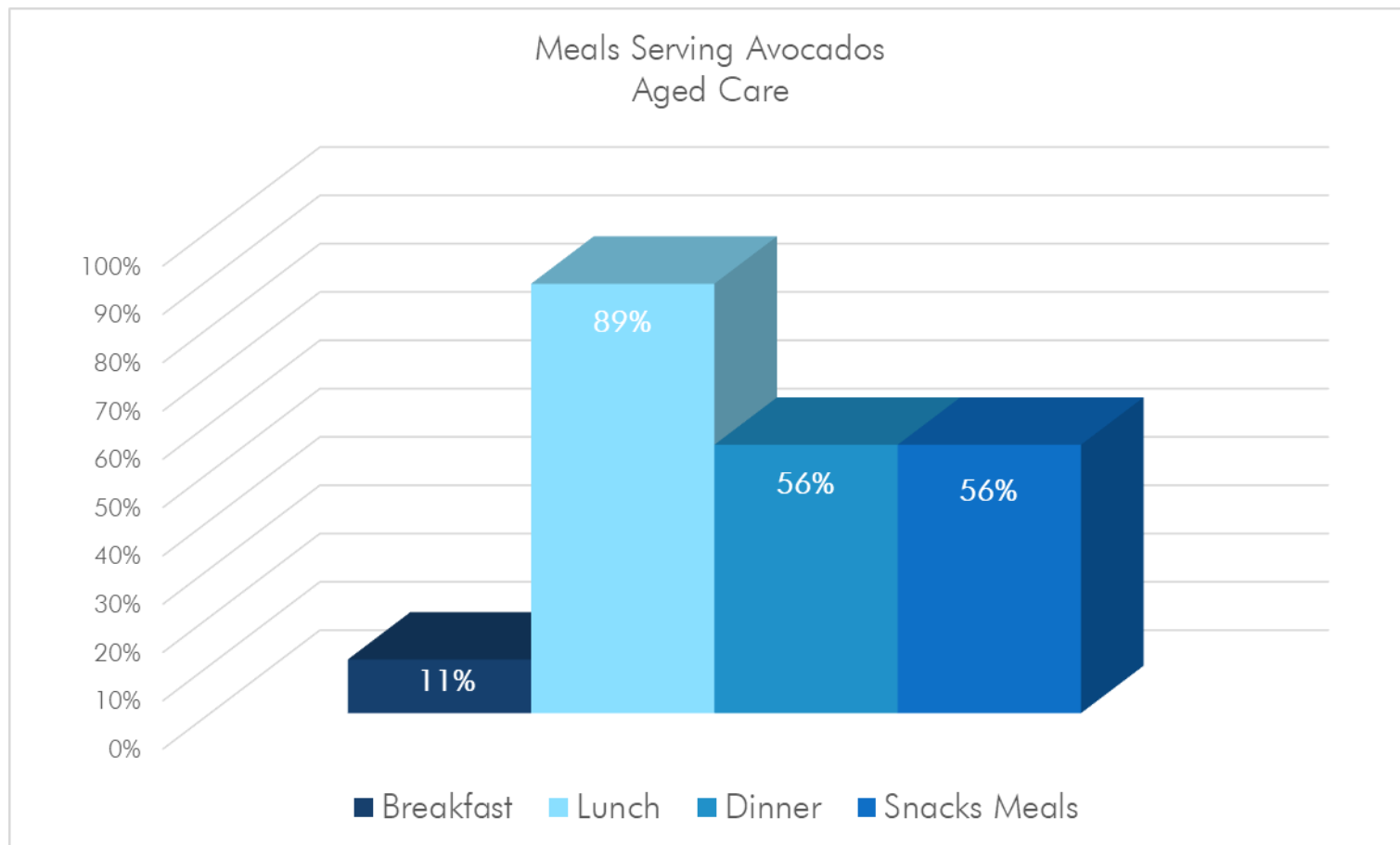
Meals Serving Avocados
Function Caterers



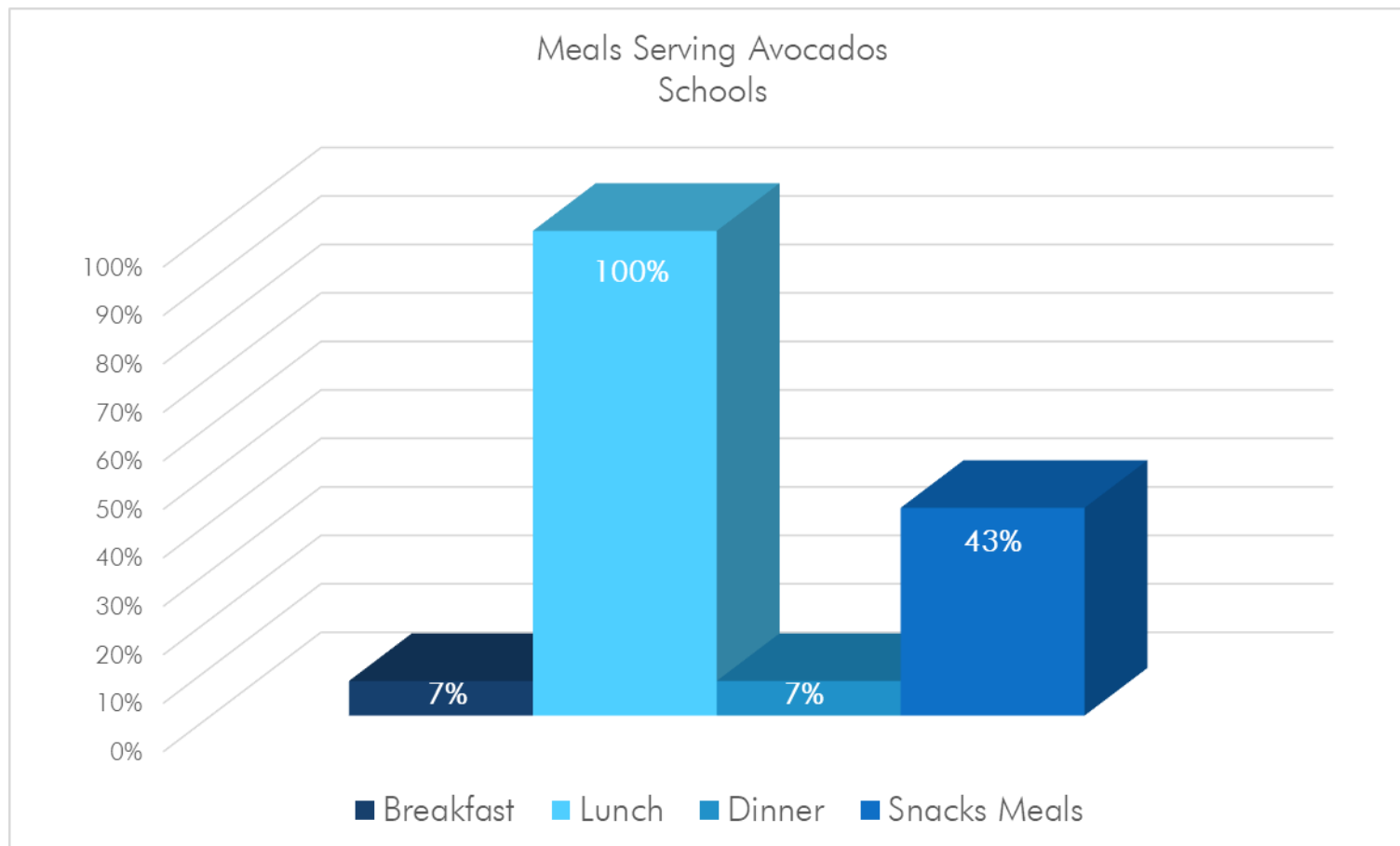
❖ Over three quarters of all Function Caterers include Avocados in their Lunch and Dinner menu options.



❖ Brunch is not a meal segment in Hospitals, however, Snack Meals include Avocados in just under half of all facilities.

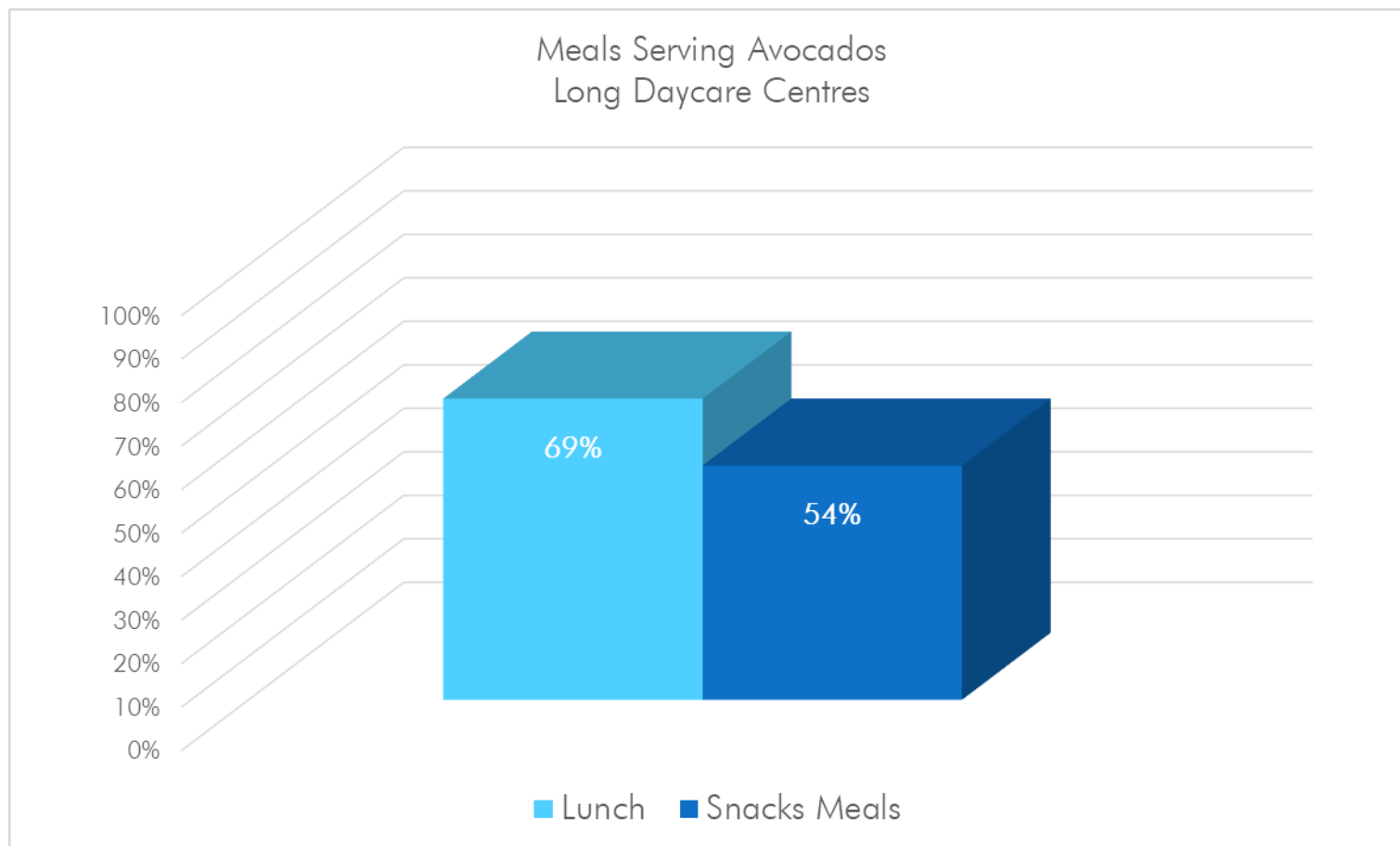


- ❖ Interestingly, 56% of all Aged Care facilities serve Avocados in their Dinner menu and Snack Meals.
- ❖ The dominant meal segment is Lunch with 89% of Aged Care facilities serving/using Avocados.



- ❖ All schools use Avocados in their menu offerings at Lunch.
- ❖ This would be in salads, sandwiches, wraps and the introduction of sushi in a lot of canteens.

4 MEALS SERVING AVOCADOS – LONG DAYCARE CENTRES



- ❖ Lunch meals include Avocados in their menu in 69% of all Long Daycare Centres.

A close-up photograph of several avocado slices on a wooden cutting board. The slices are arranged in a row, showing the green flesh and the dark green skin. The background is a blurred wooden surface.

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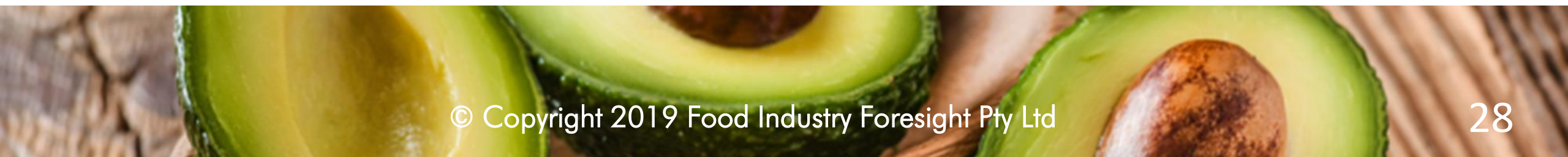
SOURCE OF SUPPLY – WHOLE AVOCADOS

SUMMARY: PRIMARY SOURCE OF SUPPLY WHOLE AVOCADOS



PRIMARY SOURCE OF SUPPLY	TOTAL MARKET	COMMERCIAL	INSTITUTIONAL
Specialist Distributor/Wholesaler	51%	55%	40%
Supermarkets	17%	12%	30%
General Distributor	13%	14%	11%
Central Markets	8%	9%	6%
Direct from Producer/Grower	7%	8%	4%
Other Retail	4%	2%	9%
Cash & Carry	0%	0%	0%

- ❖ Across the entire market, the number one primary source of supply for Whole Avocados are the Specialist Distributor/Wholesalers.
- ❖ All other distribution channels do not exceed 17% of respondents nominating them as their primary source.
- ❖ Not surprisingly, this picture is reflected in the Commercial Sector.
- ❖ However, Institutional operators nominate two main primary sources of supply, that is Specialist Distributor/Wholesalers (40%) and Supermarkets (30%).



SECONDARY SOURCE OF SUPPLY SUMMARY

WHOLE AVOCADOS



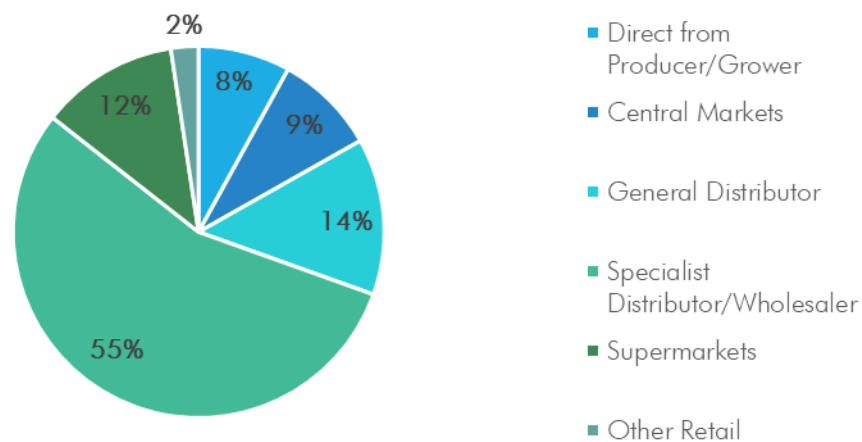
SECONDARY SOURCE OF SUPPLY	TOTAL MARKET	COMMERCIAL	INSTITUTIONAL
Supermarkets	47%	47%	47%
No Secondary Source of Supply	23%	26%	17%
General Distributor	8%	6%	13%
Specialist Distributor/Wholesaler	8%	9%	6%
Central Markets	5%	6%	4%
Other Retail	5%	2%	13%
Direct from Producer/Grower	2%	2%	0%
Cash & Carry	1%	2%	0%

- ❖ When it comes to secondary source of supply for Whole Avocados, the picture is very similar in both foodservice sectors.
- ❖ Supermarkets are the secondary source of supply by a long shot (47%).
- ❖ About one fifth of all outlets do not have a secondary source of supply.

SOURCE OF SUPPLY – WHOLE AVOCADOS COMMERCIAL



Primary Source of Supply - Whole Avocados Commercial



- Specialist Distributor/Wholesalers have over half the share of primary distribution of Whole Avocados across all Commercial outlets.

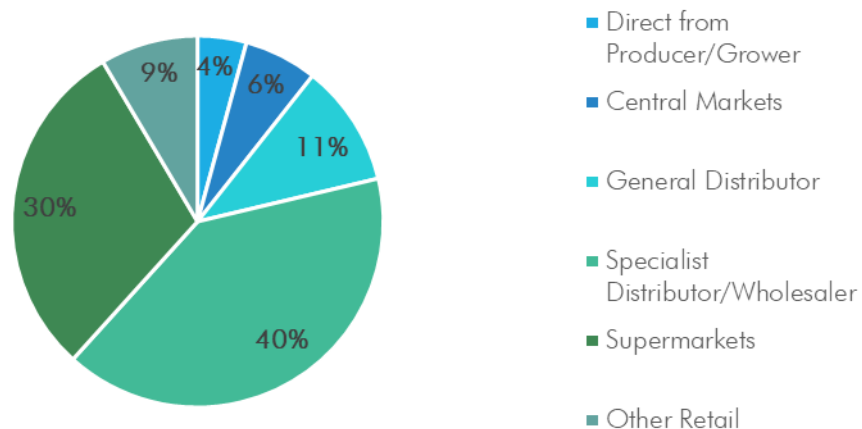
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	2%
Central Markets	6%
General Distributor	6%
Specialist Distributor/Wholesaler	9%
Cash & Carry	2%
Supermarkets	47%
Other Retail	2%
No Secondary Source of Supply	26%

- All seven distribution channels have some share of the secondary source of supply of Whole Avocados, although this is heavily dominated by Supermarkets.

SOURCE OF SUPPLY – WHOLE AVOCADOS INSTITUTIONAL



Primary Source of Supply - Whole Avocados
Institutional



- Specialist Distributor/Wholesalers have a 40% share in the primary distribution of Whole Avocados across all the institutions followed by Supermarkets (30%).

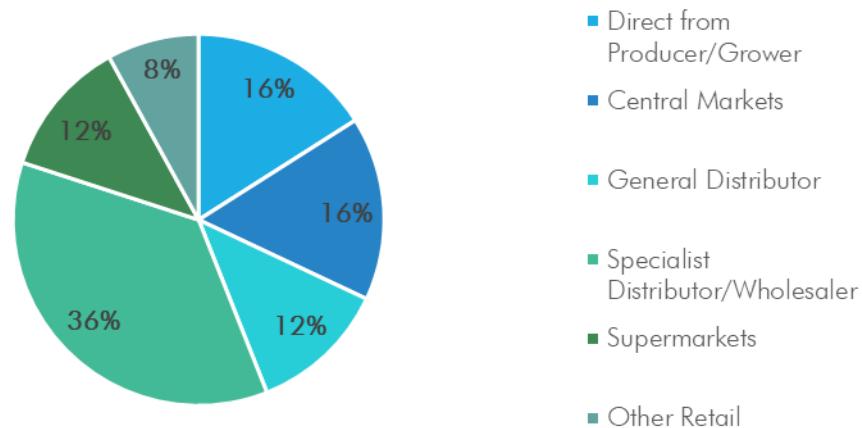
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	4%
General Distributor	13%
Specialist Distributor/Wholesaler	6%
Cash & Carry	-
Supermarkets	47%
Other Retail	13%
No Secondary Source of Supply	17%

- With the exception of Direct from Producer/Grower and Cash & Carry all other distribution channels have some share of the secondary source of supply.

SOURCE OF SUPPLY – WHOLE AVOCADOS RESTAURANTS



Primary Source of Supply - Whole Avocados Restaurants



- Restaurants primarily source their Whole Avocados from Specialist Distributor/Wholesalers (36%), however, five of the other channels have a fairly equal share ranging from 8% to 16%.

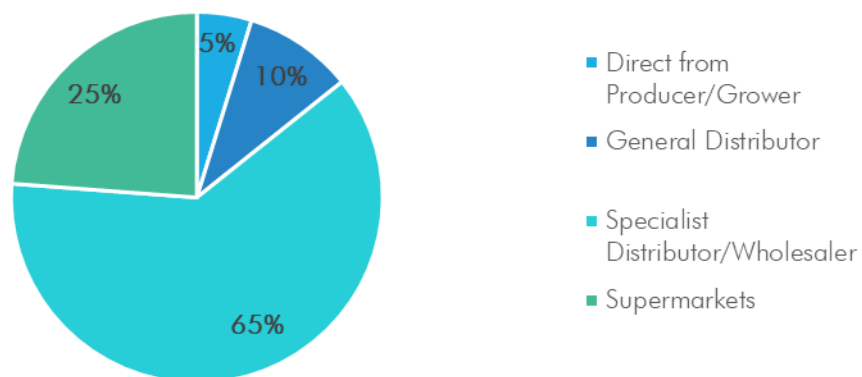
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	4%
Central Markets	4%
General Distributor	-
Specialist Distributor/Wholesaler	12%
Cash & Carry	-
Supermarkets	36%
Other Retail	-
No Secondary Source of Supply	44%

- Supermarkets have the same secondary share of the market as Specialist Distributor/Wholesalers do as a primary source at 36%, however, more outlets have no secondary source of supply.

SOURCE OF SUPPLY – WHOLE AVOCADOS CAFÉS



Primary Source of Supply - Whole Avocados Cafés



- Cafés primarily source their Whole Avocados from Specialist Distributor/Wholesalers with a share of 65%.

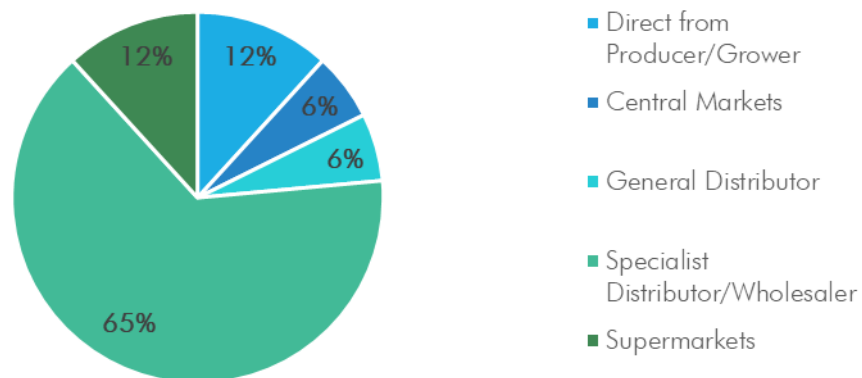
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	10%
Central Markets	10%
General Distributor	5%
Specialist Distributor/Wholesaler	10%
Cash & Carry	-
Supermarkets	60%
Other Retail	-
No Secondary Source of Supply	5%

- Supermarkets are the dominant secondary source of supply at 60%.

SOURCE OF SUPPLY – WHOLE AVOCADOS HOTEL/MOTELS



Primary Source of Supply - Whole Avocados
Hotel/Motels



- Similarly to Cafés, Hotel/Motels primary source of supply of Whole Avocados is dominated by Specialist Distributor/Wholesalers at 65%.

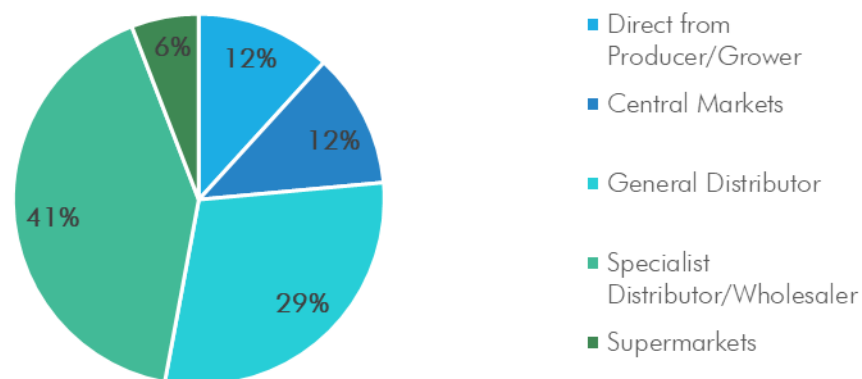
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	12%
General Distributor	18%
Specialist Distributor/Wholesaler	6%
Cash & Carry	-
Supermarkets	35%
Other Retail	6%
No Secondary Source of Supply	24%

- The secondary source of supply is spread across five different distribution channels, with Supermarkets having the highest share at 35%.

SOURCE OF SUPPLY – WHOLE AVOCADOS CLUBS



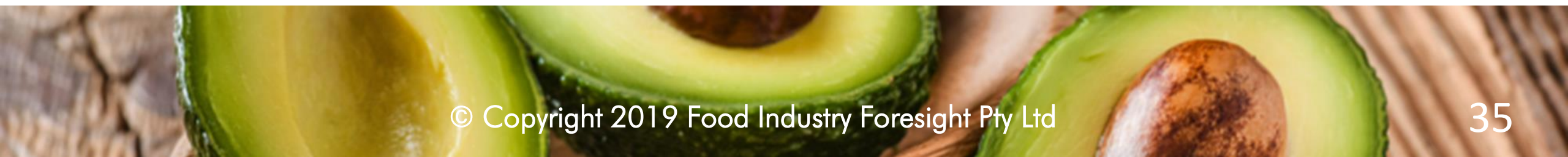
Primary Source of Supply - Whole Avocados Clubs



- Interestingly, Clubs primary source of supply is quite high for General Distributors (29%), unlike the other Commercial channels.

Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	6%
Specialist Distributor/Wholesaler	-
Cash & Carry	6%
Supermarkets	47%
Other Retail	6%
No Secondary Source of Supply	35%

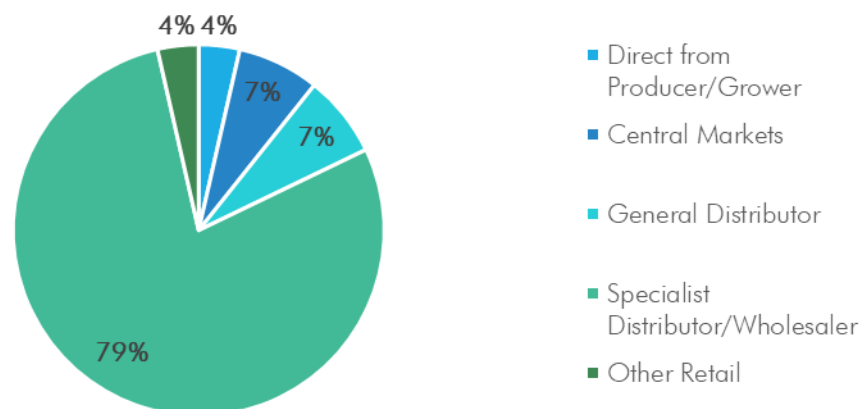
- Again, Supermarkets have the largest share of secondary source of supply of Whole Avocados for Clubs at 47%, although 35% have no secondary source of supply at all.



SOURCE OF SUPPLY – WHOLE AVOCADOS PUB/TAVERNS



Primary Source of Supply - Whole Avocados
Pub/Taverns



- Pub/Taverns are heavily dominated by Specialist Distributor/Wholesalers when it comes to the primary source of supply for Whole Avocados.

Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	4%
General Distributor	-
Specialist Distributor/Wholesaler	11%
Cash & Carry	-
Supermarkets	50%
Other Retail	-
No Secondary Source of Supply	36%

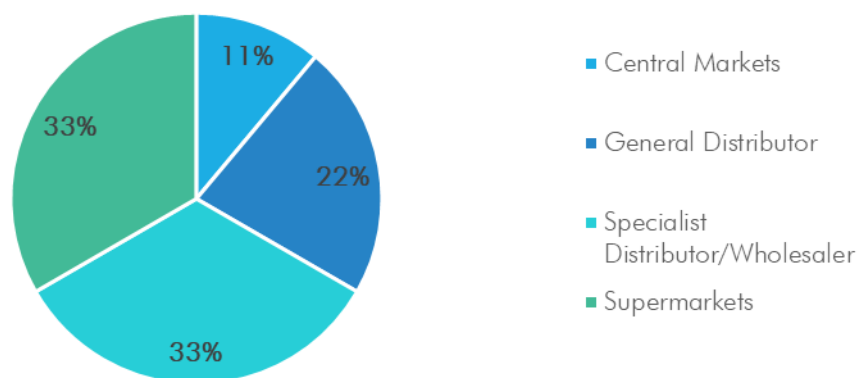
- Only three distribution channels are used as a secondary source of supply, dominated by Supermarkets at 50%.

SOURCE OF SUPPLY – WHOLE AVOCADOS

QSR INDEPENDENTS



Primary Source of Supply - Whole Avocados
QSR Independents



- QSR Independents only primarily source their Whole Avocados from four channels, none of which have any significant dominance.

Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	-
Specialist Distributor/Wholesaler	22%
Cash & Carry	-
Supermarkets	67%
Other Retail	-
No Secondary Source of Supply	11%

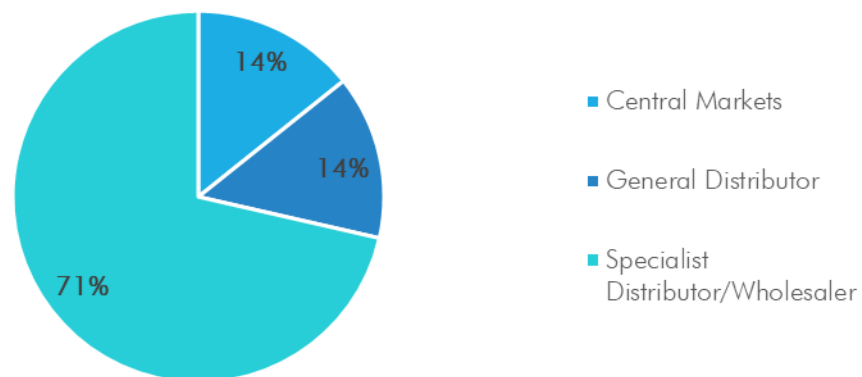
- When it comes to the secondary source of supply, again Supermarkets dominate the market with 67%.

SOURCE OF SUPPLY – WHOLE AVOCADOS

FUNCTION CATERERS



Primary Source of Supply - Whole Avocados
Function Caterers



- Although, Specialist Distributor/Wholesalers dominate the primary source of supply for Function Caterers, Central Markets and General Distributors have a 14% share each, being higher than in most other channels.

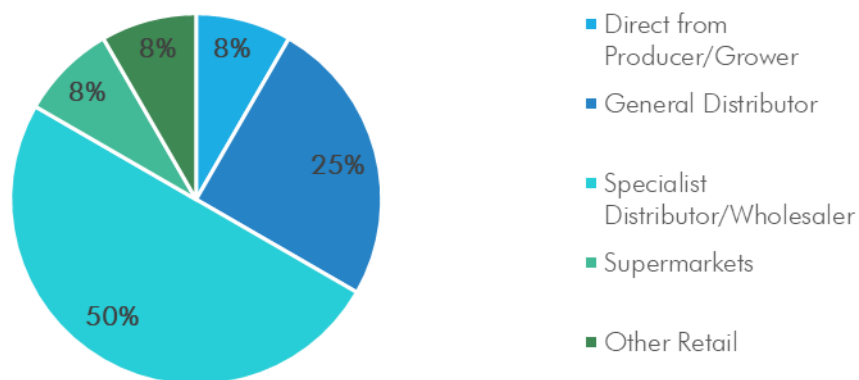
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	29%
Specialist Distributor/Wholesaler	-
Cash & Carry	14%
Supermarkets	43%
Other Retail	14%
No Secondary Source of Supply	-

- Four distribution channels are used when it comes to the secondary source of supply of Whole Avocados amongst Function Caterers.

SOURCE OF SUPPLY – WHOLE AVOCADOS HOSPITALS



Primary Source of Supply - Whole Avocados
Hospitals



- Half the primary source of supply of Whole Avocados within the Hospital channel is Specialist Distributor/Wholesalers.

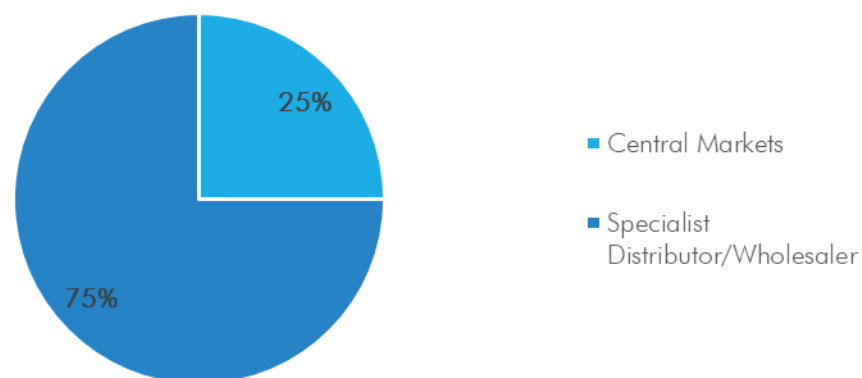
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	33%
Specialist Distributor/Wholesaler	8%
Cash & Carry	-
Supermarkets	50%
Other Retail	8%
No Secondary Source of Supply	-

- Supermarkets (50%) and General Distributors (33%) dominate the secondary source of supply for Whole Avocados in Hospitals.

SOURCE OF SUPPLY – WHOLE AVOCADOS AGED CARE



Primary Source of Supply - Whole Avocados
Aged Care



- Interestingly, there are only two distribution channels that are the primary source of supply of Whole Avocados for Aged Care.

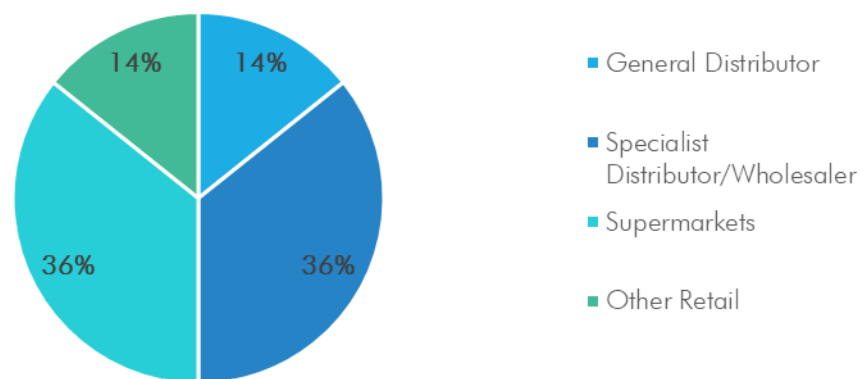
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	25%
General Distributor	12%
Specialist Distributor/Wholesaler	13%
Cash & Carry	-
Supermarkets	50%
Other Retail	-
No Secondary Source of Supply	-

- Although Supermarkets are not a primary source of supply, they are the main secondary distribution channel with a 50% market share.

SOURCE OF SUPPLY – WHOLE AVOCADOS SCHOOLS



Primary Source of Supply - Whole Avocados Schools



- Both Specialist Distributor/Wholesalers and Supermarkets have an equal share of 36% when it comes to the primary source of supply of Whole Avocados in Schools.

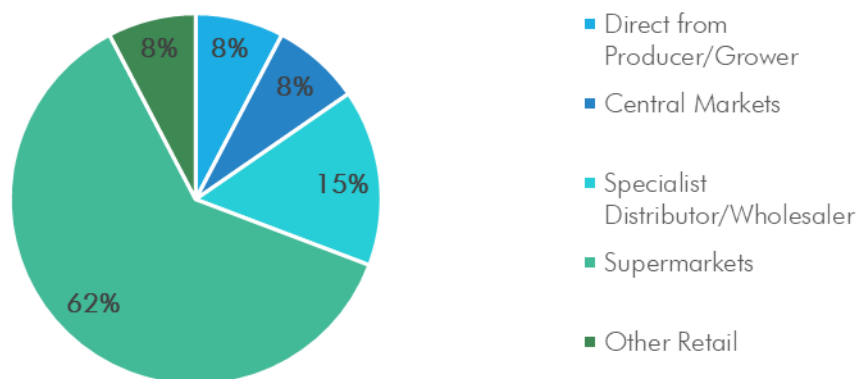
Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	7%
Specialist Distributor/Wholesaler	7%
Cash & Carry	-
Supermarkets	50%
Other Retail	14%
No Secondary Source of Supply	21%

- Similarly to Aged Care, Supermarkets have a 50% share of the secondary source of supply.

SOURCE OF SUPPLY – WHOLE AVOCADOS LONG DAYCARE CENTRES



Primary Source of Supply - Whole Avocados
Long Daycare Centres



- Not surprisingly, Long Daycare Centres primarily source their Whole Avocados from Supermarkets with a 62% share.

Secondary Source of Supply	Whole Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	-
Specialist Distributor/Wholesaler	-
Cash & Carry	-
Supermarkets	38%
Other Retail	23%
No Secondary Source of Supply	38%

- Supermarkets and Other Retail are the only secondary source of supply channels, however, equally as many as Supermarkets (38%) have no secondary source of supply at all.

A close-up photograph of several avocado slices on a wooden cutting board. The slices are arranged in a row, showing the green flesh and the dark green skin. The wooden board has a natural grain pattern. A teal banner with white text is overlaid on the middle of the image.

6

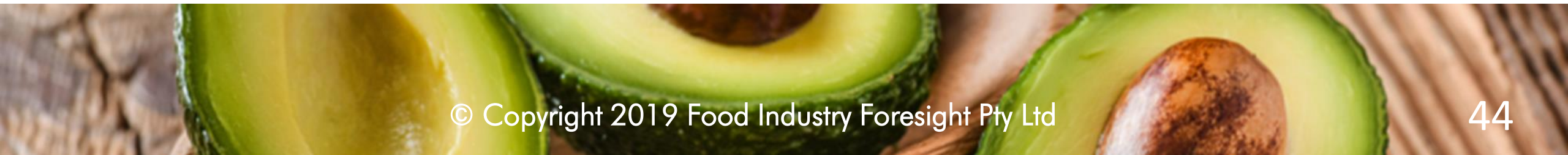
SOURCE OF SUPPLY – PROCESSED AVOCADOS



As is evident from the market sizing of Processed Avocados, the use/purchase of this product type is generally very low among foodservice operators.

Hence, total sample bases are low for the analysis of primary and secondary source of supply for Processed Avocados **by foodservice channel**.

The findings are, therefore, only presented by the Commercial and Institutional sectors.



SUMMARY: PRIMARY SOURCE OF SUPPLY PROCESSED AVOCADOS



PRIMARY SOURCE OF SUPPLY	TOTAL MARKET	COMMERCIAL	INSTITUTIONAL
General Distributor	72%	63%	92%
Specialist Distributor/Wholesaler	25%	33%	0%
Supermarkets	3%	4%	8%
Direct from Producer/Grower	0%	0%	0%
Central Markets	0%	0%	0%
Cash & Carry	0%	0%	0%
Other Retail	0%	0%	0%

❖ General Distributors dominate as the primary source of supply for Processed Avocados.



SUMMARY: SECONDARY SOURCE OF SUPPLY PROCESSED AVOCADOS



SECONDARY SOURCE OF SUPPLY	TOTAL MARKET	COMMERCIAL	INSTITUTIONAL
Supermarkets	47%	42%	50%
No Secondary Source of Supply	17%	33%	0%
Specialist Distributor/Wholesaler	17%	13%	17%
General Distributor	14%	4%	33%
Direct from Producer/Grower	3%	4%	0%
Central Markets	3%	4%	0%
Cash & Carry	0%	0%	0%
Other Retail	0%	0%	0%

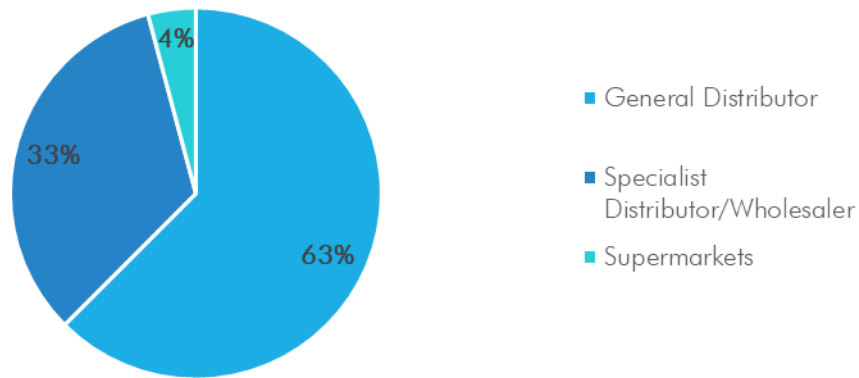
❖ Supermarkets are the main secondary source of supply for Processed Avocados.



SOURCE OF SUPPLY – PROCESSED AVOCADOS COMMERCIAL



Primary Source of Supply - Processed Avocados Commercial



- Unlike Whole Avocados where General Distributors only have a 14% share, they dominate the Processed Avocados primary source of supply across the Commercial sector.

Secondary Source of Supply	Processed Avocados
Direct from Producer/Grower	4%
Central Markets	4%
General Distributor	4%
Specialist Distributor/Wholesaler	13%
Cash & Carry	-
Supermarkets	42%
Other Retail	-
No Secondary Source of Supply	33%

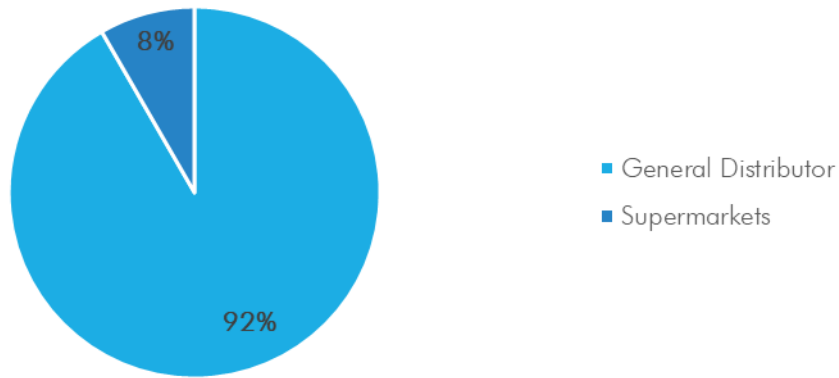
- Five of the distribution channels have some share of the secondary source of supply, however, all minor with the exception of Supermarkets (42%) and Specialist Distributor/Wholesalers (13%) and none at all (33%).

SOURCE OF SUPPLY – PROCESSED AVOCADOS

INSTITUTIONAL



Primary Source of Supply - Processed Avocados
Institutional



- Similarly to the Commercial sector, the institutions are dominated by General Distributors when it concerns their primary source of supply of Processed Avocados.

Secondary Source of Supply	Processed Avocados
Direct from Producer/Grower	-
Central Markets	-
General Distributor	33%
Specialist Distributor/Wholesaler	17%
Cash & Carry	-
Supermarkets	50%
Other Retail	-
No Secondary Source of Supply	-

- Supermarkets have the main share of secondary distribution, followed by General Distributors at 33%.



7

COUNTRY OF ORIGIN



IMPORTANCE OF COUNTRY OF ORIGIN



COMMERCIAL CHANNEL	RATING
Restaurants	5.7
Cafés	5.3
Hotel/Motels	4.9
Clubs	5.1
Pubs	4.6
QSR Independents	4.8
Function Caterer	2.9

- Except for Function Caterers, all channels consider Country of Origin to be significant when it comes to purchasing Avocados. It is most important among Restaurants, Cafés and Clubs.

Rating scale of 1 to 7; where 1 = not at all important and 7 = very important

INSTITUTIONAL CHANNEL	RATING
Hospitals	5.2
Aged Care	3.8
Schools	5.5
Long Daycare Centres	5.0

- Aged Care facilities are not too concerned with Country of Origin when it comes to Avocados, however, all the other Institutional channels rate it over five points.



A close-up photograph of several avocado slices arranged on a rustic wooden cutting board. The slices show the vibrant green flesh and the dark green, bumpy skin. The background is a blurred wooden surface, creating a warm and natural aesthetic.

8

QUALITY OF AUSTRALIAN AVOCADOS



COMMERCIAL CHANNEL	RATING
Restaurants	6.2
Cafés	5.9
Hotel/Motels	6.1
Clubs	6.2
Pubs	5.9
QSR Independents	5.8
Function Caterer	6.0

- All Commercial channels rate the quality of Australian Avocados reasonably high within a small range between 5.8 and 6.2.

Rating scale of 1 to 7; where 1=very low and 7=very high

INSTITUTIONAL CHANNEL	RATING
Hospitals	6.0
Aged Care	5.8
Schools	5.7
Long Daycare Centres	5.9

- The institutions also rate the quality of Australian Avocados well with a range of only three decimal points, from 5.7 to 6.0.



A close-up photograph of several slices of ripe avocado resting on a rustic wooden cutting board. The avocado flesh is a vibrant green, and the dark green, bumpy skin is visible on the outer edges of the slices. The wooden board has a prominent grain pattern and a warm, natural tone. The lighting is soft, highlighting the texture of the avocado and the wood.

9

ENTRÉE VS MAIN



COMMERCIAL CHANNEL	ENTRÉE %	MAIN %
Restaurants	33.2	66.8
Cafés	30.0	70.0
Hotel/Motels	36.5	63.5
Clubs	41.0	59.0
Pubs	30.8	69.2
QSR Independents	23.8	76.2
Function Caterer	51.3	48.7

- Across all Commercial channels except for Function Caterers, Avocados are used more for the Main course compared with Entrées. Not surprisingly, Function Caterers use Avocado equally in both menu dishes.

INSTITUTIONAL CHANNEL	ENTRÉE %	MAIN %
Hospitals	28.2	71.8
Aged Care	29.4	70.6
Schools	10.7	89.3
Long Daycare Centres	34.4	65.6

- Far more Avocados are used for the Main course among institutions.



A close-up photograph of several avocado slices on a wooden cutting board. The slices are arranged in a row, showing the green flesh and dark green skin. The background is a blurred wooden surface.

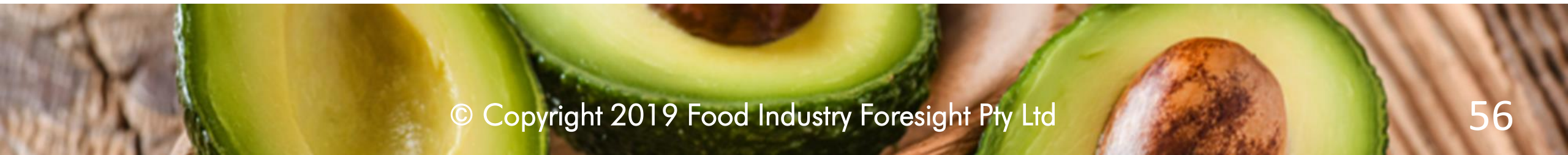
10

SEASONALITY OF AVOCADOS

10 SEASONALITY FOR USING AVOCADOS - COMMERCIAL



COMMERCIAL CHANNEL	SUMMER %	AUTUMN %	WINTER %	SPRING %	ALL YEAR ROUND %
Restaurants	16	-	-	4	80
Cafés	19	-	-	-	81
Hotel/Motels	30	-	-	-	70
Clubs	18	-	-	-	82
Pubs	42	-	-	-	58
QSR Independents	11	-	-	-	89
Function Caterer	13	-	-	-	87



SEASONALITY FOR USING AVOCADOS - INSTITUTIONAL



INSTITUTIONAL CHANNEL	SUMMER %	AUTUMN %	WINTER %	SPRING %	ALL YEAR ROUND %
Hospitals	23	-	-	-	77
Aged Care	33	-	-	-	67
Schools	50	-	-	7	43
Long Daycare Centres	38	-	-	-	62



A close-up photograph of several avocado slices on a wooden cutting board. The slices are arranged in a row, showing the green flesh and dark skin. The background is a blurred wooden surface.

11

REASONS FOR NOT INCLUDING AVOCADOS ON THE MENU

REASONS FOR NOT INCLUDING WHOLE AVOCADOS COMMERCIAL



COMMERCIAL CHANNEL	PRICE IS TOO HIGH %	NOT IN SEASON %
Restaurants	36	36
Cafés	36	32
Hotel/Motels	35	35
Clubs	65	29
Pubs	32	45
QSR Independents	11	11
Function Caterer	75	38

- ❖ Seasonality and Price are the two main reasons for not including Whole Avocados on commercial foodservice menus.
- ❖ Clubs and Function Caterers are the most sensitive to price charged.

REASONS FOR NOT INCLUDING WHOLE AVOCADOS INSTITUTIONAL



INSTITUTIONAL CHANNEL	PRICE IS TOO HIGH %	NOT IN SEASON %
Hospitals	62	46
Aged Care	78	22
Schools	64	71
Long Daycare Centres	38	46

- ❖ The same two reasons exist among Institutional operators for not including Whole Avocados on the menu.
- ❖ Long Daycare Centres are the least sensitive to prices charged.

REASONS FOR NOT USING PROCESSED AVOCADOS



Negative views about processed Avocados included:

- “Processed avocados are slimy.”
- “Not nice”
- “....has no taste whatsoever.”
- “...taste has no resemblance to the real thing... a completely different taste.”
- “Does not taste like avo...and the customers know.”
- “...an awful after taste.”
- “If we have to use [processed avocado], it is only good for guacamole, that kind of thing.”



A close-up photograph of several avocado slices on a wooden cutting board. The slices are arranged in a row, showing the green flesh and dark green skin. The background is a blurred wooden surface.

12

REASONS FOR INCLUDING AVOCADOS ON THE MENU

REASONS FOR INCLUDING WHOLE AVOCADOS COMMERCIAL



COMMERCIAL CHANNEL	CUSTOMER REQUEST %	GOOD FAT - NUTRITIONAL %	POPULAR %	FRESH INGREDIENT %
Restaurants	36	56	80	52
Cafés	59	18	95	59
Hotel/Motels	50	55	80	65
Clubs	35	71	88	71
Pubs	48	19	81	35
QSR Independents	33	-	56	44
Function Caterer	13	50	88	63



REASONS FOR INCLUDING WHOLE AVOCADOS INSTITUTIONAL



INSTITUTIONAL CHANNEL	CUSTOMER REQUEST %	GOOD FAT - NUTRITIONAL %	POPULAR %	FRESH INGREDIENT %
Hospitals	31	77	62	46
Aged Care	89	44	56	33
Schools	21	79	64	57
Long Daycare Centres	-	77	31	31



REASONS FOR USING PROCESSED AVOCADOS



- ❖ Reasons for using processed avocados in operators' menu offering include:
 - i. Improved margins per dish
 - ii. Processed avocados last longer than fresh whole avocados
 - iii. "...the only positive thing you could say is that frozen pulp makes fresh go longer when we have large functions."





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