

Talking Avocados



PMA Fresh Summit Part 1

Canopy Management Update

Protecting Livelihoods and Lifestyles

Summer 2008

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Chairman's Perspective

Production Levels

As anticipated by the industry, the production in 2007 increased significantly, compared to previous years. Final figures for 2007 will be around 40,050 tonnes, compared to around 35,000 tonnes in 2006. This is quite an increase, and the indications are that we should reach around 46,000 tonnes in 2008. Obviously this tonnage has created many challenges for the growers, the markets and the industry as a whole. There were a number of mixed messages during the year, which lead to some confusion in the retail and wholesale markets. Some of these related to artificially capped high prices in the market place, and fruit being held in storage for too long (to the detriment of the fruit).

There are some very important marketing lessons from this year, and these need to be considered in the context of 2008 as another year of potentially increased yield. These include:

- Smarter and more collaborative marketing
- A planned and well coordinated approach
- Focus on a broad range of markets, both domestic and export
- Awareness of consumer survey outcomes and applying lessons learnt.

Promotional levies on imported products

In my October report to Talking Avocados, I mentioned Avocados Australia is working towards the introduction of Federal laws to ensure that all imported avocados will be subject to the same levies as avocados grown in Australia. It is important to note that these levies are only for promotion, and not for research and development. Progress is being made on this issue and, while it will not be achieved overnight, we are confident that that the outcome will be a positive result for the industry.

Future Focus – formerly Horticulture Industry Strategic Plan (HISP)

Avocados Australia, along with the peak bodies of other horticulture industries and HAL, is contributing to an across industry project in an endeavor to create an umbrella strategic plan for Australian horticulture. As you would appreciate, this is a massive undertaking, in terms of the complexity and diversity of the industry and broad range of issues to be covered. Funds have been contributed by Federal Government, horticulture industries and private entities such as retailers and wholesalers. Some of you may have already been approached to provide input.

The completion date of the project is October/ November 2008 and the plan will be made available.

VI World Avocado Congress, Chile

The VI World Avocado Congress was held in Vina del Mar, Chile in November 2007. A total of 1,200 delegates from across the world attended

and were treated to a professional and well organised conference. Both the conference program and the social events were outstanding and the entire conference was a great credit to the Chilean organising committee and the Chilean avocado industry as a whole.



The program included presentations from a number of Australians, and I would particularly like to congratulate Antony Allen, Joanna Embry and Dr John Leonardi (from the Avocados Australia office) for their excellent papers and for making a significant contribution to the conference.

It was great to see such a large contingent of Australians attending the conference. It is impossible to put a price on the knowledge gained and the whole experience of such a world conference. We were all proud that the Australian reception was one of the social highlights of the conference, with Australian and international guests effusive in their positive feedback!

Finally, a stunning outcome of the conference was the successful Australian bid to host the VII World Avocado Congress in 2011. This will be an exciting and challenging chapter for us all, and will provide the opportunity to highlight our very successful industry, and professional and well regarded scientists. It will certainly take us onto the world stage.

Season's greetings

I hope you had a very Happy Christmas and have a prosperous and very happy New Year. May 2008 bring you good health and much happiness.

Henry Kwaczynski

Henry Kwaczynski
Chairman, Avocados Australia





So much more than just a market

The Brisbane Produce Market is Queensland's fresh fruit and vegetable hub, trading over 625,000 tonnes of produce each year and ensuring the most efficient and effective marketing and distribution of Queensland's fresh fruit and vegetables.

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Industry Matters

Written, edited and compiled by
Antony Allen CEO of Avocados Australia

2008 another record year for Australian avocado production

The 2008 season is forecast to be another record year for the Australian industry. Every month will see a record volume of fruit into the market.

January to December 2008 Australian Avocado Production estimates 5.5kg eqv trays	
North Queensland	1,443,366
Central Queensland	3,499,375
Sunshine Coast	700,000
Southern Queensland	943,892
Northern NSW	372,353
Central NSW	486,075
Tri State	219,176
WA	834,355
Total	8,498,593

Two important and linked factors in our success for this year will be retail price and fruit quality. These two factors will have a major impact on the 2008 season and the flow of fruit.

With New Zealand forecast to remain in the Australian market well into March 2008 the market will need to careful management. The change over period between New Zealand Hass and Shepard and then to Australian Hass will need to managed particularly carefully.

Communication will be essential, talk to your packing houses, marketing groups, agents and supermarket buyers keep them informed, keep them up to date on all aspects of your crop. This year is the opportunity to build strong consumption that we can build on into the future.

The national promotion program will be the largest undertaken and will run from February 2008 through to November 2008. The first phase for the period February to May is outlined below.

Avocado promotions ready to launch

The first phase of the 2008 year promotion campaign is about to be launched. For the first time the national promotion program will begin in mid February. The industry's promotion resources can now deliver a promotion program from February through to November. A range of magazines, word of mouth and TV form the first stage of the avocado promotion campaign.

The strategic direction continues to focus heavily on versatility, demonstrated by recipe usage. Targeting the female grocery buyer 20–39 years, both media and creative relies on introducing new uses for avocados supported always by specific recipe usage.

This phase is being rollout in print advertising, such as Woman's Day, New Idea, Notebook, Cosmopolitan Who Weekly, New Woman, Delicious, Super Food Ideas, Good Taste and health and parenting titles such as Mother & Baby, Practical Parenting, Australian Parents, Out & About Kids, Little Kids and Pregnancy & Birth.

TV will target the very successful free to air cooking shows where avocados will feature, with ADD an AVO ads running during the shows along with a number of pay TV channels, also with intergrated adocado usage.

MEDIA/MARKET	Media Plan: February 08 to May 08																	
	FEBRUARY				MARCH					APRIL				JUNE				
	3	10	17	24	2	9	16	23	30	6	13	20	27	4	11	18	25	1
MASS/LIFESTYLE MAGAZINES																		
Woman's Day																		
New Idea																		
Notebook																		
Cosmopolitan																		
Who Weekly																		
New Woman																		
New Woman (insert recipe booklet)																		
FOODIE MAGAZINES																		
Delicious																		
Super Food Ideas																		
Good Taste																		
WORD OF MOUTH + SAMPLING																		
Fitness First TV Network + Club Sampling																		
Fernwood Magazine + Club Sampling																		
PPC Mum's Group + Sampling																		
Ultimate Media: 93 Fitness centres																		
Ultimate Media: 77 Aquatic centres																		
HEALTH, EXPECTANT & MUMS - KIDS U3																		
Mother & Baby																		
Mother & Baby (insert recipe booklet)																		
Practical Parenting																		
VW Aust Parents																		
Pregnancy & Birth																		
Out & About Kids																		
Little Kids																		
New Baby Bounty Bag																		
TELEVISION																		
PayTV TVC (15 sec)																		
PayTV TVC (30 sec)																		
Channel 10 TVC (30 sec)																		
- Ready Steady Cook																		

Industry Matters
continued

Word of mouth (WoM) will be expanded the WoM approach provides essential information directly into our target market. WoM has been shown to be a very creditable and effective way of transferring information through out the community.

The tag line is ADD an AVO, focusing on the versatility and usage, demonstrating that you can add an avocado to just about any meal. Health and nutrition closely follows the versatility message. Keep a look out for the ADD an AVO message. We will keep you posted on each phase over the coming year. The June 08 to November 08 phase will be in place very shortly.

More Information on the next phase will be available in the Autumn edition of *Talking Avocados*.

Adding an Avo at School!

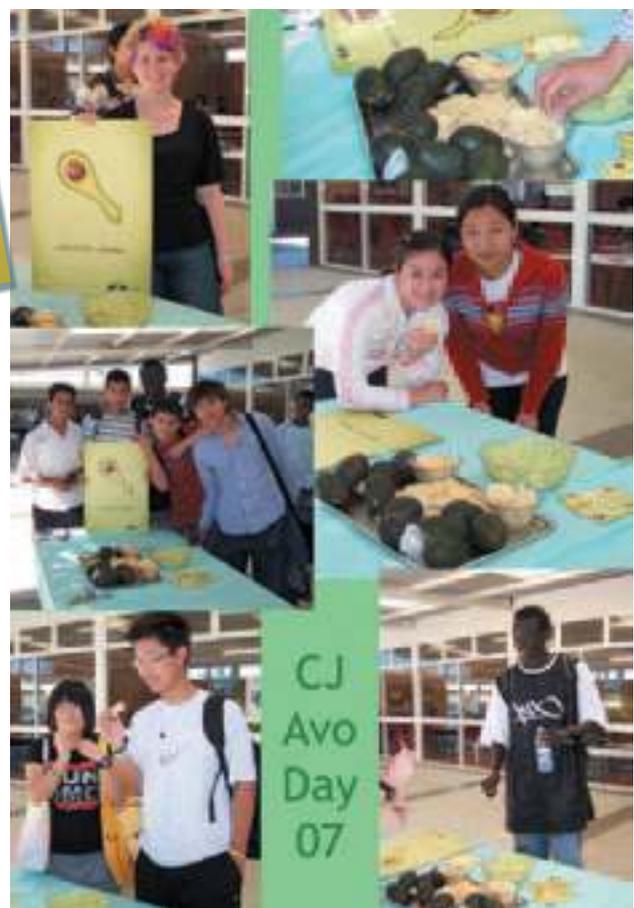
Perth retailers should notice increased interest in avocados from younger shoppers, since students took part in a recent Avocados in Schools Project. This year almost 3,000 students in thirty primary and secondary schools took part.

Fresh Finesse has coordinated this project for several years now, offering recipe ideas, questionnaires, and most importantly, avocados to schools throughout the State.

Schools are invited to sign up to feature avocado recipes in their cooking classes during the WA avocado season.

During the classes, students are asked such questions as:
Have you tasted avocados before?
How often does your family eat avocados?
Did you like avocados before this lesson?
After this class, will you eat avocados more often?

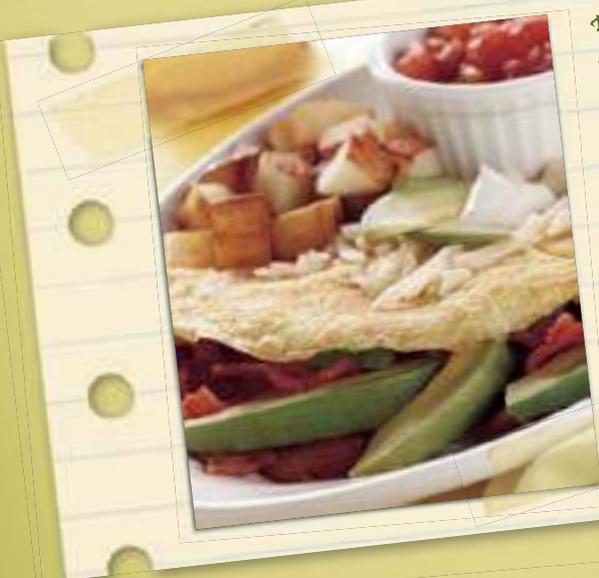
Many of the students had never tasted avocados. Teachers tell us that avocados are not usually offered to the whole class because of the cost factor. For the same reason, family shoppers are loathe to purchase in case children do not like them. Students are much more likely to experiment when they are with their peers and many told us they now love avocados, especially as a dip with vegetable sticks.



Students from Cyril Jackson Senior High School just love Avocados!



ADD AN AVO TO EGGS



BACADO OMELETTE

Serves: 2

Preparation time: 10-12 mins

Cooking time: 10 mins

Ingredients

- 6 eggs
- 2 teaspoons unsalted butter
- 2 slices bacon, grilled crisp
- 50g (1/2 cup) shredded cheddar or Mozzarella cheese
- 1 avocado, sliced
- 1/2 cup (125ml) sour cream
- 1/2 cup (125ml) salsa

Preparation:

- Crumble the grilled bacon.
- Whisk eggs to a foamy consistency.

- Heat 1 teaspoon butter in a small frying pan and pour in half the egg.
- Cook until set but still creamy on top.
- Evenly distribute half the bacon over one side of the omelette and add several avocado slices.
- Fold the omelette and cook briefly, then flip and cook the other side. Turn onto a warmed plate.
- Cook the second omelette in the same way, then place on a grill pan and scatter the cheese evenly over them. Heat grill to high, and grill omelettes until the cheese is bubbling.
- Garnish with remaining avocado slices, sour cream and salsa and serve.
- As a light lunch or snack, serve with a toasted muffin and sauteed potatoes.

HCA0020

For more easy recipe ideas, visit avocado.org.au



Australian Avocados

HCA0025



HEALTHY FOR YOUR BABY

Avocados smooth and creamy consistency makes it one of the first fruits a baby can enjoy. They also contain the monounsaturated fats essential for a baby's development, and are a great source of folate for expecting mums. It's no wonder Avocados are the most nutritious fruit in the world.

www.avocado.org.au

ADD AN AVO



Australian
Avocados

Industry Matters continued

VI World Avocado Congress and Pre Congress Tour

Early in November 2007, 37 avocado growers from across Australia led by John Leonardi (Avocados Australia), Simon Newett (QDPI) and Joanna Embry (Avocados Australia) travelled to Chile for the VI World Avocado Congress, preceded by a tour of avocado orchards, packing houses and processing facilities. The tour began in Santiago (Chile's capital) and continued on to a number of the main avocado growing regions in Chile and concluded in Vina Del Mar (one of Chile's coastal tourist destinations) where the VI World Avocado Congress was hosted by the Chilean avocado industry.

The pre-congress tour included a good mixture of the workings of the Chilean avocado industry for the growers in the group as well as some of the tourist offerings around Santiago and Vina Del Mar more tailored towards the congress delegate partners. Some of the highlights of the tour included a visit to one of the Chilean avocado industry's largest exporters' orchards and packing/processing facility, visits to some smaller domestic market orchards and processing facilities and a meeting with the Chilean Fruit Exporters Association. Of course a bit of South American dancing and nightlife supplemented the daytime highlights.



The VI World Avocado Congress was an extremely well organised event offering presentations from international experts in all areas including genetic resources, pests and diseases, cultural management, post harvest and processing and marketing. Copies of some of the papers are available by visiting the "Avocado Source" website. Go to www.avocadosource.com

The Avocado Brainstorming Workshop was held following the Congress on the 17-20th November near San Felipe one of the important avocado growing regions in Chile. The purpose of the meeting was to review the status of scientific knowledge through in depth discussions and develop collaborative ties among international researchers. Over 65 people

including researchers, students and consultants representing all the avocado growing countries attended the workshop. The Australian industry was represented by John Leonardi (Avocados Australia), Jonathan Cutting (Agriculture WA) and Peter Hofman (QDPI).

A full report of the tour, the VI World Avocado Congress and the Brainstorming Workshop will be published in the Autumn edition of Talking Avocados but if you would like specific information regarding any of these events in the meantime please contact John (07 3391 2344), Joanna (07 3391 2344) or Simon (07 54 449 619).

New political battle lines drawn in agriculture

The new Federal Agriculture Minister says the government's drought support policies will be refocused to take account of the realities of climate change. Tony Burke says genetically modified crops will be a key tool for farmers who decide to stay on the land.

Mr Burke has a small business and industrial relations background, and was Labor's immigration spokesman before the election. And though he comes from inner Sydney and has no direct connection with farming, he says he's prepared to be judged by the results he delivers.

Meanwhile, the new Opposition agriculture spokesman, Nigel Scullion, says his priority will be holding Labor to account on issues like freeing up on wheat marketing, the quarantine review and how trade policy changes affect farmers. The Nationals' deputy from the Northern Territory has a background in fishing, mining and mango farming. Senator Scullion expects agriculture will be a real political battleground. Source: ABC

Australia's Wesfarmers starts work on supermarkets

Australia's Wesfarmers Ltd has announced its overhaul of the troubled Coles supermarkets would begin immediately, although a new head of the business may not arrive for some months.

Wesfarmers, which became the country's largest retailer with its A\$20 billion (\$18 billion) takeover of Coles Group Ltd last week, said it hoped to announce a new head of food and liquor by Christmas. "The supermarkets business is performing poorly and it requires significant change," Wesfarmers Managing Director Executive Richard Goyder said after an investor briefing.

"We're not going to wait for the new CEO (of supermarkets). The change will be immediate, in coming days, weeks and months," he said. Goyder has narrowed the search to two British retailing experts.

His priorities for the country's second-largest supermarket chain, where sales growth has stalled, included improving fresh fruit and vegetables, meat, bakery and fish, and updating a supply chain that lags that of rival Woolworths Ltd (WOW.AX: Quote, Profile, Research).

Wesfarmers on Tuesday brought out its star adviser on Coles, British retailer Archie Norman, who has spent his career transforming ailing retail operations and was responsible for resurrecting the Asda

Industry Matters
continued

supermarket chain in the 1990s.

Norman said Asda had been a “shipwreck” when he took over, while Coles presented a “challenge”.

“I think this is the most exciting turnaround opportunity in global retail,” he said. Wesfarmers expects the overhaul to take five years, although improvements will be visible in the first year.

Norman did not see the gap with Woolworths, where core food and liquor sales are up 7.6 percent, as insurmountable. “There is nothing they are doing that we can’t match,” he said. Source: Reuters

Foodservice keeps growing despite challenges

The Australian foodservice industry will continue to expand despite the challenges being faced with the drought, interest rate rises and skilled labour shortages as long as foodservice operators take advantage of new opportunities being presented by trends such as healthy eating and food allergies, according to a new report from BIS Shrapnel.

The forecaster’s report Australian Foodservice 2007 predicted the industry would struggle with the economic factors facing it in 2008 but said that the industry had grown strongly in the past and would continue to grow.

It said Australia had a rising number of two income households which would lead to a propensity to eat out more.

BIS Shrapnel Food and Beverages unit manager Sissel Rosengren the survey showed confidence was very high at the moment despite the drought, labour shortages and interest rate rises. “Food manufacturers and foodservice operators still on then whole believe there are many more opportunities in the market and much more growth to come,” she said.

The report estimates the foodservice industry is now worth around \$35bn in consumer prices and predicts the sector will have annual growth of 6.8 per cent between 2007 and 2012.

BIS Shrapnel Food and Beverages unit manager Sissel Rosengren that in the commercial sector the strongest growth would come from full service restaurants, cafes and hotel channels. The breakfast segment is also growing strongly while healthy eating changes in menus in clubs and quick service restaurants are also providing supply opportunities for manufacturers and distributors, she said.

Gluten-free products are in high demand across most product categories and each channel requires options from their suppliers to cater for the growing number of gluten intolerant customers.

“Food manufacturers should be thinking foodservice not retail,” said Rosengren. “Given eating out is how a way of life for many generations an socio-economic groups in Australia, consumers are in many cases pushing fast food outlets, restaurants and cafes to offer a greater range of healthy eating options and ‘free from’ foods.”

“Operators are turning to suppliers to meet this demand, and in the instance of gluten-free and lactose-free products in many cases distributors are unable to meet these requests.

There was strong demand by foodservice operators in some parts of the country for Australian made or regional produce however the survey found while operators want to buy it they feel that “when it comes to the crunch” it was not possible to obtain Australian-made fresh or dried produce.

Rosengren said these was even the case for chefs but that five star chefs were an exception. “They will go to great lengths to source regional and Australian-made/grown products,” she said.

The report revealed that the use of the Internet as a tool for researching menu ideas and ordering supplies showed little change to five years ago. Eighteen per cent of those surveyed said they used the internet or email for all or part of their ordering. “The internet is used for food ordering mainly in high volume outlets,” Rosengren said. “For many foodservice operators ordering is still very much on the ‘back of the envelope’ Most foodservice operators prefer to develop a personal relationship with suppliers.”

“On the whole, foodservice operators rely on magazines, its peers, exhibitions, and competitors to find out about new products and sourced ideas for menus, rather than researching on the internet.”

Source: Hospitality Magazine

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Industry Matters continued

Australian avocado harvest hit by weather, imports

A jump in New Zealand imports, water restrictions and severe frosts have hit the avocado crop in Victoria and South Australia. Riverland grower Nick Hobbs says 600,000 trays of the fruit are being imported from New Zealand each month. He says that is making it difficult for growers to stay in business.

“We’re growing in one of the hardest places in Australia while we had a marketing niche at a premium price up until now as New Zealand keeps flooding the market with fruit, which was initially planted for the American market we’re going to find it more and more difficult to survive,” he says.

Source: ABC

Court case will test ban on managed investment schemes

In a move welcomed by grower groups, the Australian Tax Office has confirmed that no new managed investment schemes will be allowed after July 1 next year.

It’s expected that the schemes will now present a test case to the Federal Court to challenge the tax office’s ruling.

The chief executive of one scheme, Rob McGavin from Boundary Bend Limited in Victoria, says he’s glad there will be a court case.

“The tax department I think have been working actively with industry

so that they can expedite something to the courts, to work out who’s right and who’s wrong”, he says.

“That’s probably something that we knew was going to happen and something we welcome, as far as getting some clarity on the situation.”

Pink Lady Apple Sees Global Growth; Strengthening of Brand

Annual conference of International Pink Lady Alliance in France



Substantial growth in production and a marked increase in the attention going to the brand set the tone at the annual conference of the International Pink Lady Alliance recently held in Avignon, France. The optimistic report on Pink Lady production came from Jon Durham, IPLA Chairman, who noted that this relatively new apple has been demonstrating a substantial global annual average growth of 14 percent.

Global Cripps Pink (variety name) production has increased from approximately 250 thousand metric tons in 2003 to 300 thousand in 2005, 360 in 2007 and is projected to be at around 400 in 2008. The Southern Hemisphere continues to be the major producer of this apple as it grows one and a half times the volume seen in the Northern Hemisphere.

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Industry Matters
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Southern Hemisphere countries such as South Africa, Argentina, Chile, New Zealand and Australia are producing around 210 thousand metric tons this year compared to 150 in the Northern Hemisphere. The projection for 2008, sees this trend continuing with 245 thousand metric tons coming from the south and 155 from the north.

A major issue is how this fruit is marketed and how that impacts the brand. That is, is it sold under the trademark name of 'Pink Lady' or the variety name which is 'Cripps Pink.' This tendency remains firmly in favor of Pink Lady Brand with 150 thousand metric tons sold under that trademark in 2003 compared to 100 as Cripps Pink.

In 2007 that Pink Lady number had grown to 250 while Cripps Pink has grown to only around 110. The 2008 projection sees around 275 thousand metric tons marketed as Pink Lady and 125 as Cripps Pink. Durham said it's very encouraging to see the growing acceptance of the Pink Lady Brand on a global basis. That it's indicative of a number of elements beginning with a quality product being supported by a strengthening (IPLA) association.

The 35 representatives in attendance also approved members from Japan and Uruguay. This brings to nine the number of IPLA members which includes those originating the association in 1999 from Europe, South Africa, USA, Argentina, Chile, New Zealand and Australia.

Another major development at the meeting was the adoption of what's called Pier-to-Pier licensing. This form of licensing relates to the type of agreements where there is a principle requirement that both the exporter and importer must be licensed to utilize the brand. Under this arrangement, they can only work with licensed entities in order to ship the branded product from one territory to another.

NFF survey reveals more problems with Next G

The National Farmers Federation says there are still too many problems with Telstra's new mobile phone network to allow the CDMA service to be switched off at the end of the month.

The NFF has carried out a second survey of its members, and found there are still concerns about the new Next G handsets, and other phone equipment.

In New South Wales alone, 71 per cent of the 1200 respondents believe the mobile service is not up to scratch.

The NFF has now asked the Federal Government to delay the CDMA shutdown for another six to eight weeks.

President David Crombie says general coverage is alright, but there are still plenty of complaints.

"Well my understanding is there are over 1000 responses that have come from New South Wales and Telstra is working their way through it," he says. "I mean, give Telstra credit in this.

"They've actually put on extra staff and are actually working through the issues but I mean NSW Farmers in particular have passed on about 1000 queries." Telstra says it is still planning to shut off the

CDMA network on January 28th. Director of Telstra Countrywide, Gary Goldsworthy, says the equipment has been widely tested, and there have been few customer complaints.

"The testing that we've done on the handsets, the Blue Tick range in particular have been tested in the most harshest and most remotest parts of Australia," he says.

"We've also undertaken a drive test of over 120,000km throughout regional Australia and you know that testing is showing us time and time again that the network is right, the coverage is right, we've got the right handsets, we've got the right accessories". Source: ABC

Woolworths to launch new grocery chain

Woolworths is preparing to launch a new food retail concept in Sydney.

Woolworths has internally codenamed the project "Project Basil" – and a spokesman says they will be branded Thomas Dux Grocer.

The first two Thomas Dux Grocer stores will open in April or May 2008. One will be located in the lower north shore suburb of Lane Cove, in an existing Food For Less supermarket site at 62 Burns Bay Rd, the other in a site currently home to a small Woolworths on Glenmore Rd in Sydney's Paddington.

While details at this stage are scant, it is understood the new concept will be locally driven with a bigger fresh food offering and a bigger

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Industry Matters continued

deli section. A Woolworths' spokeswoman said the interior would be "smart", but not as high-end as David Jones' Foodhalls.

A spokesman for Lane Cove's Food For Less said the store would close on January 13, re-opening about three months later under the Thomas Dux Grocer brand. Source: ABC

Metcash offers IGA retailers \$100 million

Metcash will offer IGA retailers \$100 million in loans for store refurbishments as part of a wider 'fresh food' strategy.

Metcash is Australia's third-largest grocer, supplying more than 8000 large and small sized retail outlets nationally, including 1300 IGA supermarkets.

Metcash says the low-documentation loans are effectively interest free, as at least 75% of interest payments will be returned to retailers as rebates.

IGA Distribution CEO Lou Jardin told the Australian Financial review that Metcash anticipated a 20% sales increase from refurbished stores.

"We have 1300 stores around the country and by and large, independent retailers have been very slow in upgrading and refurbishing their stores. This is aimed at kick-starting that program and driving investment a lot quicker than we have in the past."

He said it was hoped store owners would encourage store owners to refurbish their stores every seven or eight years instead of every 12 to 14 years and to expand their fresh food offers in line with Metcash's focus on fresh food.

OzTaste joins Freshmax stable



Fruit and produce distributor Freshmax has acquired Australian fresh fruit marketer OzTaste from founding directors Andrew Prentice and Rocky Varapodio for an undisclosed sum. OzTaste is the third business Freshmax has acquired this year, along with Holman Fresh and Panda Ranch. These acquisitions make Freshmax one of the largest fruit supply chain companies in Australasia.

"This consolidation of fruit supply businesses brings together a wealth of experienced people in fruit and produce growing, packing and global marketing, a team dedicated to providing the best service and year round supply to markets locally and worldwide," says Freshmax group managing director David Smith.

As part of the new arrangements, well known Goulburn Valley Fruit business, Pickworth Orchards (owned by Stuart Pickworth) along with OzPac and OzProduction owned by (Rocky Varapodio and Andrew Prentice) have signed supply agreements to provide Holman Fresh with 100% of their fruit.

The new business will be jointly owned by Sydney-based Wolseley

Private Equity along with staff and management from the companies, including Freshmax, Holman Fresh, Panda Ranch, Pickworth Orchards and OzTaste.

Freshmax is also developing a new field service, called Freshmax Farms, which will provide Freshmax with an internal farming and production entity with over 1,300 acres of farming production and dedicated fruit packing and cool storage facilities in Tatura, Ardmona and Orrvale in Victoria, Australia.

"This completes our supply chain, so management will be free to focus on the core areas of growing, packing and marketing," says David. OzTaste was formed in 2002 from the merger of three of Australia's leading stone fruit, apple and pear grower and packer operations. Founding directors Andrew Prentice and Rocky Varapodio believe the business will contribute significantly to the growth of Holman Fresh within Freshmax.

Freshmax has made a substantial investment into the future of its business, seizing on the opportunity to create an Australasian fruit and produce group which will lead to major supply chain efficiencies, developed market access, and improvements in global marketing, customer service and logistical capabilities.

Company information

Freshmax Pty Ltd which operates out of Sydney is now the owner of Freshmax which was a privately-owned New Zealand produce business acquired by management from Frucor Holdings (formerly ENZA) in 1997. It operates in three primary areas: international trading in fruit and produce; domestic supply of fruit and produce; cool chain distribution and logistics services.

Pickworth Orchards is a long-standing family business in Tatura, Victoria. It is renowned for its premium apples and cherries.

OzPac is the company managing the packing facilities of Varapodio Orchards in Ardmona and Eastfield Orchards in Orrvale which merged in 2006.

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Industry Matters
continued

OzProduction is the management company which manages the Group's orchards. OzProduction is also contracted to manage the orchards of Freshmax Farms.

Holman Fresh, through **OzTaste** and **Panda Ranch**, and **Freshmax Farms**, will operate from new offices in Shepparton, Victoria, as well as the Holman Fresh operations based in Melbourne and Sydney.

Mandala Grove has released a new range of oils: Gourmet Blend

Using the health benefits associated with cold pressed oils, the Gourmet Blend range is made from Extra Virgin Olive Oil, Avocado Oil and Lemon Oil and boasts antioxidants, anti-aging properties and vitamins A, B, E and K.

Rod Thompson, Mandala Grove's MD, said the company goes to great lengths to ensure the quality of all of its products including Gourmet Blend.

"We proudly use only the freshest ingredients which have been grown to perfection and hand-picked in one of Australia's renowned pastoral locations - the Darling Downs," Thompson said.

"Our commitment to chemical-free production ensures only all-natural, highly nutritious cold pressed oils are produced every single time further contributing to the health benefits found in Mandala Grove's products."

Gourmet Blend comes in a pack of six 375ml bottles and retails for \$63.00 plus \$10.00 postage and handling through Mandala Grove's online store. Further details available at www.mandalagrove.com

Congratulations to Lesley Stackhouse. Diligence pays off!

Avocados Australia last year piloted "Orchard Info" in Western Australia. This program is focussed on collecting information about the total number of avocado trees growing in Australia and their associated productivity by variety and various other factors. This is a very important project for collating baseline data on which to base long term projections for the industry as well as a tool for growers to measure their own performance against their region and the industry as a whole.

All Western Australian growers who sent in their information by the designated time were eligible to win a prize consisting of an accommodation package. Lesley Stackhouse from Mystery Creek Avocados at Alton Park was the winner, entitling her to a \$750 certificate for the Accor group of hotels which include a broad range of hotels comprising Sofitel, Pullman, Grand Mercure, Novotel, Mercure, All Seasons, Ibis and Formula 1 in locations all across Australia, to see the full range go to www.accorhotels.com.au

The Orchard Info program is being rolled out across Australia region by region this year and a similar prize will be offered in each region as an extra incentive to contribute to this important project.

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STOP PRESS

Avocado industry researchers receive Australia Day awards

Avocados Australia and Australian avocado growers congratulate both Dr Tony Whiley and Mr Ken Pegg for their tireless and dedicated work for the avocado industry, which has been recognised in the Australia Day 2008 Honours List.

The Member of the Order of Australia has been awarded to both:

Mr Ken Pegg: For service to horticulture as a research scientist in the field of plant pathology, particularly disease management of tropical and subtropical fruit crops. Ken worked as Plant Pathologist at the Queensland Department of Primary Industries and Fisheries (QDPI&F) from 1962 to 1973, then as Senior Principal Scientist from 1973 until his retirement in 2001. Currently, he is a QDPI&F Post Retirement Associate. He has worked and continues to work with the disease *Phytophthora cinnamoni*, and conducted early breakthrough research with positive impacts, particularly for the avocado industry.

He also worked with the disease *Fusarium*; leading plant breeding to the development of resistant cultivars, with positive impacts for the banana industry. He has authored numerous book chapters, refereed publications, non-refereed publications (extension) and conference papers.

Dr Tony Whiley: For service to horticulture as a research scientist, particularly through the development of disease resistant plants and improved growing, marketing and management practices in the avocado and mango industries.

Between 1968 and 2002, Tony worked as Research Horticulturalist, Queensland Department of Primary Industries and Fisheries; contributing to the ginger industry and the breeding and development of the 'Calypso' mango and the avocado industry. He is currently an international consultant for the Chilean Avocado Industry. He has been a member of the Avocados Australia, Varieties Committee since 1979, and was a member of the Avocados Australia, Research and Development Committee between 2002 and 2005. Tony was

also a Presenter at the World Avocado Congresses in 1987, 1991, 1995, 1999 and 2007. He is the editor and an author of the definitive world avocado text *The Avocado: Botany, Production and Uses*, 2002; published by CAB International UK and author/co-author, of over 240 technical, scientific papers and book chapters, 1974-2007.

In what have been parallel careers in avocado research, both Dr Whiley and Mr Pegg, originally working in the Queensland Department of Primary Industries, began in avocado research over 35 years ago and continue to support and mentor each other to this day.

Over the last six years, outside of the QDPI&F, both Dr Whiley and Mr Pegg have continued to focus their considerable avocado knowledge on ensuring the Australian industry has the ability to deliver higher quality avocados to Australian and international consumers, through disease management, rootstock improvement and the understanding of many aspects of what is a little understood tree crop.

"I can confidently say that our industry would not be worth over \$100 million per year and growing without the dedication of these two people", explained Mr Henry Kwaczynski Chair of Avocados Australia, "They both have been instrumental in allowing the Australian and

international avocado industry to successfully grow enormously."

"They continue to work and have much more to give to our industry into the future" said Mr Kwaczynski.

"We have just completed an extensive round of avocado R&D Road Shows across the main Australian growing regions at which Dr Whiley and Mr Pegg presented and interacted with growers", explained Mr Antony Allen, CEO of Avocados Australia. "It was very obvious how highly avocado growers respect both men. They have earned growers respect through working hard for our industry."

"They both have been instrumental in growing the Australian industry over 20 fold in 35 years and contributing millions of dollars to the value of our industry and into regional communities across Australia", said Mr Allen, "Congratulations Ken and Tony. These awards are well deserved."



Ken Pegg and Dr Tony Whiley at a recent Field Day

Cordless Electronic HAND LABELLER

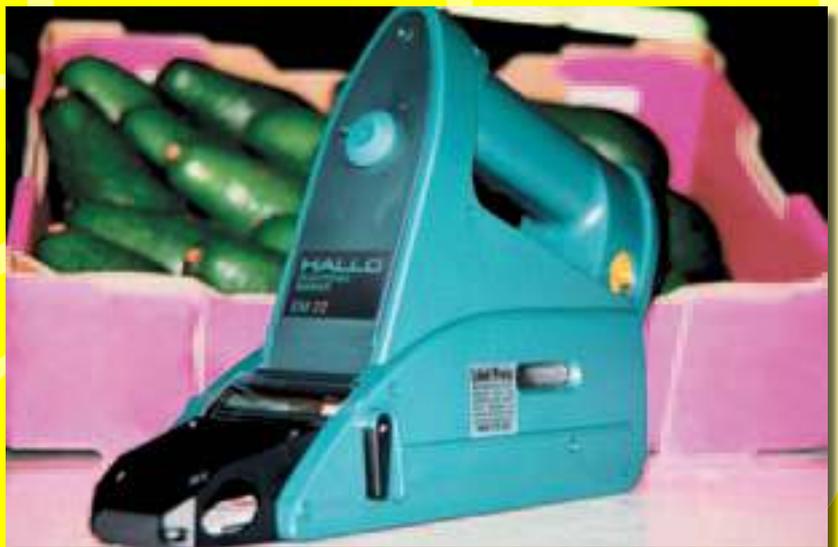
This soft touch labeller has been proven especially adequate for labelling Avocados, Mangoes, Limes etc.! Robust design yet light to hold. Simply constructed with minimal moving parts, made from carefully selected materials to eliminate maintenance problems. Simply activated by moving the labeller towards operator across the surface. No more tripping over the leads on the packhouse floor.



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Australian Roundup

Central NSW Report

By Chris Nelson Avocados Australia Director for the Central New South Wales Growing Area



For growers along our coastal strip of NSW the harvest season is finally over. Most have enjoyed their greatest yields ever and quality has been good. I know several growers have included Amistar in their spray program for the first time this year and the result has been a clear reduction in post harvest anthracnose symptoms and a corresponding improvement in packouts.

Set for next year on the coast is significantly lighter but the Comboyne region appears to be holding a very good set at this stage so overall volume from the region should remain reasonably consistent with last year.

Since I reported to you last our region has benefited from orchard workshops plus the Avocados Australia Road Show and the Annual Levy payers reporting session from HAL and the Avocado Industry Advisory Committee. In August John Leonardi ran the canopy management field day in Stuarts Point and in October Simon Newett ran the 2007 component of his 3 year study group project. This first session focused on growing avocados under limited water conditions. Next years session will be conducted in Comboyne. In Central NSW the Avocados Australia Roadshow was held at Ian and Alison Tolsons property in Stuarts Point and was very well attended. As usual the growers love to walk the orchard with those scientists! Once again on behalf of all growers in this area I would like to thank HAL and Avocados Australia for facilitating all of the extension activities for 2007.

Central Queensland Report

By Lachlan Donovan and John Walsh Avocados Australia Directors for Central Queensland Growing Area



The Bundaberg/Childers outlook for water has improved in the recent months with water allocation increasing on the south side of the Burnett River to 24% while the North remains the same. Groundwater allocations have not changed. Rainfall as at the end of December 2007 has been patchy but the outlook is still good for more rain to help restore surface and groundwater supplies.

The crop set in the district is up on last year. With the increase in crop planning for next season in more important than ever, so keep the information flow into Infocado and to your customers so that the industry as a whole can plan to move the fruit through the system to consumers and build on the increase in consumption from the 2007 crop.

Pest pressure in the district has been moderate with the exception of higher leaf roller and looper numbers in some areas. The increase in some chemicals as well as labour over the last 12 months has continued to raise the pressure on input costs for horticulture in general for the region.

North NSW Report

By Tom Silver, Avocados Australia Director for the Northern New South Wales Growing Area



By the time this issue of Talking Avocados goes to print all growers in North NSW should be picked, pruned, injected, sprayed, mulched, fertilised, irrigated and be busy counting their millions from the previous season. Yeah Right!

The 2007 season was definitely a tough one. Besides the low prices, many growers had problems with smaller fruit size and higher reject rates. Though a lot of the size and quality issues can be put down to 2007 being a harsh growing season, skills learnt by farmers at recent field days can go a long way to improving the crop and therefore the return.

The 2008 crop appears to be a bit patchy as many growers have just come out of big year. However some fruit sets are still heavy, with some being extremely large and in need of a sizeable fruit drop or a good prune so as not to become stressed.

North NSW has received excellent rain since the dry spell broke back in August and it is predicted that January to March will continue to be above average for rainfall. If this is the case, growers should remember the importance of phytophthora control, especially in an already stressed orchard. If new growers are uncertain about what to do, they should seek advice as this can be a serious problem affecting orchard health and therefore fruit quality for many years after.

To everyone, all the best for summer and 2008.

North Queensland Report

By Jim Kochi Avocados Australia Director for the North Queensland Growing Area



As we move through the festive season most growers in the Mareeba-Dimbulah-Walkamin area are getting very busy with the mango season and avocado seems to take second place in the work programme. Probably just as well because the more you look at Shepard trees the more confused you get.

Hass growers have no appreciation what a variety like Shepard can do to a grower. This variety has been labelled a "shy" bearer and shy it is.

Every time you look for fruit they hide or even possibly leave the tree because every serious effort at doing some sort of yield forecast becomes a frustration. Suffice to say at this time that the Shepard crop started out as lighter than last year, possibly due to a longer colder winter. However, a few days of warm sunshine and some storm activity and suddenly we see some fruit in clusters here and there and then again maybe not. As this note goes to press we will have a better idea of the real forecast figures and that will be about harvest time. This is the same as last year. We do however have the central market gossip line that always seems to do a forecast for us and maybe that is good enough.

The Hass crop is so easy to forecast. The fruit just hangs there on the

*Australian Roundup
continued*

outside of the tree just begging to be noticed. This year the Hass crop is patchy with some growers reporting heavy crops and some light crops. The fruit drops for Shepard and Hass are just beginning so a better forecast figure will be available in January.

The summer months are always a worrying time for us with the prospect of wild storms and cyclones. I hope all growers in North Queensland and all regions pass this summer season without and serious weather damage and I wish all growers a happy festive season in the company of family and friends.

Sunshine Coast Report

By Henry Kwaczynski, Avocados Australia Director for the Sunshine Coast Growing Area



The Sunshine Coast in the last three months can be summed up in one word – RAIN! And then MORE RAIN. All areas of the coast have received average to above average rainfall, with some areas receiving record falls. The coast is very lush and green right now. The pundits are predicting a return to ‘normal’ wet seasons, with possible cyclonic weather – we wait and see. There is always a question of what one considers to be ‘normal’ – five years, ten, fifteen or even fifty or more. In fact, fifty years in nature’s cycle is but a drop in the ocean.

The crop from this region is pretty much picked and gone to market. Those people who subscribe to ‘Infocado’ will already know that this area, in line with other regions, produced higher tonnage than was anticipated. From my initial exploration, it appears that the 2008 crop may not be as buoyant as this current year.

Sunshine Coast growers are eagerly awaiting the outcomes of the Local Government election in March 2008, when Noosa, Maroochy and Caloundra will become one council – the Sunshine Coast Regional Council. Will the new Councillors, with the increased size of their divisions, be approachable and interested in your horticulture related issues? What will be the approach of the new council to concerns such as planning/ zoning and the environment? No doubt there will be some surprises for us all and we will soon discover whether big is actually better.

I take this opportunity to wish growers in the Sunshine Coast a very happy new year – may 2008 bring you good health, peace, joy and prosperity.

Tri State Report

By Colin Fechner, Avocados Australia Director for the Tri State Growing Area



Most growers in this region are nearly finished with only a few Gwen and Reed to be picked early January 2008. The Hass matured about a month earlier than normal this year because of the light crop and growers cutting back on irrigations.

The last 6 months have been extremely frustrating to growers due to the drought causing severe water shortages. We in South Australia were on 16% allocation up to the end of November when we had an increase

of 6% and a further increase mid December of 10%. Most growers have leased in water (at considerable cost) to get this crop and have some fruit for next season. Growers in South Australia have leased in over \$54 million of water this season.

Flowering was very heavy in spring and those with sufficient water have got a heavy fruit set. The extra water allocation in mid December has come too late for growers who had turned the water off of sections of their avocados or only watered them enough to keep them alive, to set a good crop.

Our secretary, Greg Liebig, has sold his property and so we will be looking for a new secretary at our South Australian Avocados Growers AGM in May 2008. Greg has been an active member of our Association for many years and secretary for the last 6 years. We wish him well in his new endeavors.

South Queensland Report

By Daryl Boardman Avocados Australia Director for the South Queensland Growing Area



Picking by most in this region would now be completed and as seen in the Infocado data this region will come in a bit under the forecast. This is due to severe frosts and smaller than average fruit size due to lack of water I would guess.

As I mentioned in the last report the fruit set looks to have held on and most orchards have a good crop load. We have experienced good weather with enough rainfall to hold the crop and good humidity that we have been missing out on in the past years.

Still most orchards will need to keep getting rain as the falls so far would have done little to refill underground water and very little increase in dam levels. Overall it’s a good start to the season and with some luck it will keep going.

We have seen an interesting market over the past couple of months with the prices rising quickly and falling just as fast. It just shows that we still have a long way to go when we get this information knowing how to use it to maintain a steady flow of fruit into the markets so that we all can receive returns that, we as farmers can make money and the people that buy our product can afford to buy it.

We must remember that once the summer fruits start such as mangos , stone fruit, etc this gives the consumers a much bigger range of products to buy and if avocados become too expensive they may become the last choice in the shopping trolley.

As it’s shaping up to be a larger crop in our part of the world communication and quality are going to very important this season. So keep in touch with your packer or marketer and maintain a good spray and fertilizer program and this will go a long way to helping with the removal of the coming season’s crop at what we would all hope to be profitable levels.

I hope that everyone has had a safe Christmas and have a wonderful 2008 year.

Protecting Livelihoods and Lifestyles



Action Plan to Protect Your Business

The Avocado industry's Biosecurity Plan is the blueprint to ensuring the best possible protection for your orchard and crop against new plant pests. Developed by Avocados Australia with Plant Health Australia (PHA) and the Federal, state and territory governments the plan is a comprehensive action plan, covering:

- How we guard against exotic pests;
- Which are the exotic pests that pose the greatest threat to industry; and
- How we will deal with exotic pests if they are found.

Henry Kwaczynski, Chairman of Avocados Australia says, "This plan is a first for Avocados and absolutely critical to our future viability. We are more and more at risk from exotic pests that could severely impact our growers' businesses. Working closely with government experts and PHA, we have developed a world-class plan. It's not a guarantee, but if we all play our part, it will give us the best possible protection. It is the first step towards being prepared to deal with such threats"

So what is 'Biosecurity'?

In plain English, biosecurity is everything we do to protect our orchards and crop from damage by exotic pests. Australia's geographic isolation has meant we have been relatively free of many pests that have wrought havoc on some industries overseas. This is a real trade benefit for us (both overseas and interstate) in terms of securing market access. And that's good for our image and growers pockets. So good biosecurity means we can keep it that way. The chart in Figure 1 illustrates the key components of our Biosecurity Plan.

Which Pests?

Of course, it is critical that we are preventing (and prepared for) exotic pests which pose the greatest threat. A rigorous process involving experts in the field and investigations overseas has generated our list of the greatest risks. We examined:

- How easy it would be for each pest to get into Australia, spread and become established.
- If an exotic pest became established here, how bad would the impact be on

productivity, profits, quarantine, trade and the community?

- And lastly, how difficult (and costly) it would be to control or eradicate.

Our target list is regularly reviewed and updated – and everyone involved kept informed.

If an outbreak occurs

How we all respond when an exotic pest incursion occurs is another part of our Plan. Everyone has their part to play – growers, industry associations and government departments. Antony Allen, Avocados Australia CEO says, "In the past, before we had this agreed plan, we'd be working it out as we go. And that's definitely not the way to manage a crisis. Now, everyone knows who does what, and it's centrally coordinated".

One of Our Top Risks



The pests identified as highest risk for the Avocado industry are:

For more details on how to spot them and who to contact if you do, check the 'Awareness' section of the Avocado Biosecurity Plan

Avocado Thrip - *Scirtothrips perseae* (this image is from the PRR)

Spotted anything unusual?

Nothing will protect your crops more than a good hard look!

Australian Government
Department of Agriculture, Fisheries and Forestry

Avocados Australia

Plant Health AUSTRALIA

LOOK, BE ALERT, CALL AN EXPERT. 1800 084 881

Avocado growers are the key to protecting Australia's orchards from emergency pests and disease. It is important that you are aware of the risk, and if you spot anything unusual on your orchard you should always check it out and call the exotic plant pest hotline on 1800 084 881. The call is free (except from mobiles) and early detection will help protect your industry.

*Protecting Livelihoods and Lifestyles
continued*

Supporting growers affected

Growers often ask, what if my farm is affected? What if my orchard or crop has to be destroyed? This too is covered by the Biosecurity Plan and a separate legal agreement between Avocados Australia and the federal and all state/territory governments (known as the Emergency Pest Plant Deed).

In the event of a declared incursion and formal response (as described in the EPPRD), growers (or 'Owners of the crop') are entitled to claim certain expenses and also the agreed value of the crop destroyed. For the first time, there is certainty, not only on how we react when an outbreak occurs, but also on how our growers will be reimbursed. Of course there are conditions and limits, but it is much better than the uncertainty that existed previously. Having signed the Emergency Plant Pest Response Deed we, the industry, are part of the decision process at every step.

What we must do.

Our industry must play its part, not only in responding to an incursion, but in actively trying to prevent one. "Governments have agreed to support industries with resources and expertise, but only if industries do their bit too", says Allen. "Everyone has a responsibility, especially growers. They are in the best position to spot an outbreak early, and report it. By working together we have the best chance of protecting our industry, the community, our orchards and our livelihoods" he said.



Avocado Industry Biosecurity Plan Launch, Donovan Farms, Childers

Want more info?

If you would like more information, get yourself of a copy of our Biosecurity Plan. You can request it on disk by emailing admin@avocado.org.au or phoning Avocados Australia on 07 3391 2344.

Common name	Scientific name
Avocado blast complex (Also caused by <i>Pseudomonas syringae</i>)	<i>Erwinia herbicola</i>
Cercospora spot	<i>Pseudocercospora purpurea</i> (Cooke)
Avocado blast complex (also caused by <i>Erwinia herbicola</i>)	<i>Pseudomonas syringae</i>
Bacterial canker complex (Also caused by <i>Xanthomonas campestris</i>)	<i>Pseudomonas syringae</i> pv. <i>syringae</i> van Hall
Bacterial canker complex (Also caused by <i>Pseudomonas syringae</i> pv. <i>syringae</i> van Hall)	<i>Xanthomonas campestris</i> (avocado pathovar)
Small avocado seed weevil	<i>Conotrachelus aguacatae</i> (Barber)
Large seed weevil	<i>Helipus lauri</i> (Boheman)
Pyriform scale	<i>Protopulvinaria pyriformis</i> (Cockerell)
Asian fruit fly complex:	
Oriental fruit fly	<i>Bactrocera dorsalis</i> (Hendel)
Tropical fruit fly	<i>Bactrocera facialis</i>
Fruit fruit fly	<i>Bactrocera kirki</i> (Froggatt)
Fruit fruit fly	<i>Bactrocera melanotus</i>
Asian Papaya fruit fly	<i>Bactrocera papayae</i>
Fijian fruit fly	<i>Bactrocera pasiflorae</i>
Fruit fly	<i>Bactrocera philippinensis</i>
Pacific fruit fly	<i>Bactrocera xanthodes</i>
Avocado scab	<i>Sphaceloma perseae</i>
Persea mite	<i>Oligonychus perseae</i> (Tuttle, Baker and Abbatiello)
Stenomid (avocado) moth, avocado fruit borer, seed moth	<i>Stenoma catenifer</i> (Walsingham)
Thrips	<i>Scirtothrips perseae</i> (Nakahara)
Avocado blackstreak disease	Unknown etiology
Duke 6 stem pitting	Unknown etiology
Avocado Sunblotch (symptomatic strains)	Avocado Sunblotch Viroid
Avocado Sunblotch (asymptomatic strains)	Avocado Sunblotch Viroid

PMA Fresh Summit: Part One

Part One of PMA Fresh Summit begins a series on this event and the benefits Fresh Summit has to offer to the Australian avocado supply chain. The series will continue be showcased in future editions of *Talking Avocados*.

PMA Fresh Summit is the one of the leading events on the global fresh produce industry calendar. Hosted annually by the Produce Marketing Association (USA), the 2006 Fresh Summit was held in San Diego and the 2007 Fresh Summit is to be held in Houston. The 2006 Fresh Summit attracted more than 17,000 produce industry representatives and 800 exhibitors from 70 countries.

The Summit is a forum for networking, learning, building relationships and doing business. It provides educational sessions on topical issues affecting issues, hosts an impressive trade exhibition and formal networking functions throughout the four day event.

Educational sessions focused on a number of areas including consumption and marketing, food safety, food service, global trade, packaging, professional development, technology and transportation.

Although strongly focused on the US market, the Summit does provide the opportunity for Australian businesses to identify trends and innovations in one of the largest consumer markets in the world. In 2006, the Australian fruit and vegetable industry was well represented with more than 80 participants attending from a range of industries and supply chain sectors.

The Chilean and Mexican produce industries were also well represented at a country, industry and business level. The country trade displays for Mexico and Chile had a strong focus on the avocado business reflecting the important and growing relationships with the US market.

The Californian Avocado Commission and Hass Avocado Board, like Avocados Australia, have responsibilities to promote the avocado category and Fresh Summit is one of the key events for these organisations to promote to the industry's wholesale, food service and retail sectors.



Fresh Summit also provides the opportunity for companies to showcase new technologies and products that have been released or are soon to be released on the market. In 2006, organic guacamole was one of the

new products to be launched at the Summit.



PMA Fresh Summit offers participants the opportunity to understand industry and promotional trends and new technologies impacting the US produce industry, including the avocado sector.

General Produce Market Information – USA

It is important to understand the nature and size of the US produce industry, so as to provide context for the industry and promotional trends that are evident in the market.

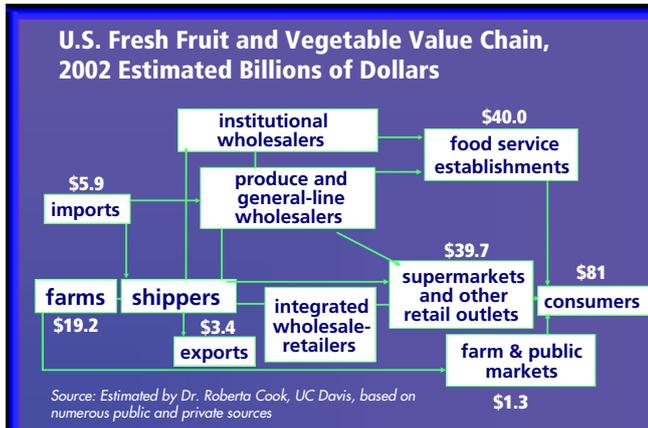
The US fresh produce industry is valued at approximately US\$81 billion (2002, source: Cook, UC Davis) at the consumer level. The farm gate value of US grown produce is US\$25.8 billion (USDA) and imports total US\$7.9 billion (Cook, UC Davis, 2004). The US exports approximately US\$4.2 billion (Cook, UC Davis, 2004).

In the last decade, U.S. consumers are purchasing more produce, more exotic varieties, and more convenient portions and packaging. The foodservice sector has increased its purchases of fresh fruits and vegetables, to the point where food service establishments utilize approximately the same value of fresh produce as the supermarket / retail sector. This is in contrast to the Australian industry where only 25-30% of produce is directed to the food service sector (Source: FoodMap, DAFF, 2007). Correspondingly, merchant wholesalers have declined in importance. Retail companies have grown larger, with mass merchandisers (e.g., Wal-Mart) more active in food marketing and supermarket chains undergoing mergers and pursuing acquisitions of

PMA Fresh Summit: Part One
continued

new stores. Purchasing strategies have also changed, with retailers and wholesalers now asking grower-shippers to provide additional services and fees, including marketing fees and inventory services.

The following diagram shows the value of supply chain components of the fresh produce industry, based on 2002 figures.



In 2004 the value of the US avocado crop was US\$291 million increasing to US\$350 million in 2005 (USDA). US production of avocados in 2005-2006 (Nov-Oct) was estimated at 247,000 tons an increase of 34 percent from the previous year.

Chile, Mexico, and the Dominican Republic are major suppliers into the US market. Peru does not supply avocados into the US market due to the quarantine restraints.

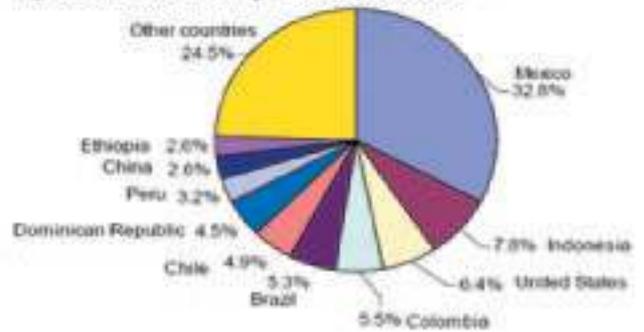
Globally, Mexico is the largest producer of Avocados, supplying over one third of the world's total production and over 40 percent of the world's exports. Mexican avocado production for 2005/06 is forecast at 1.0 million tons, up 6 percent from the previous year. Avocado exports are forecast at 250,000 tons, of which 130,000 are forecast to be exported to the United States.

Chile with less than one fifth of Mexico's production exports almost 70 percent of its production mostly to the United States. Traditionally, Chile has been the largest supplier of avocados to the U.S. import market,



however this dominance is being challenged as Mexico has gained year round access to 47 U.S. States for Hass avocados from January 2005. The United States is easily Chile's most important market, receiving 89 percent of Chile's avocado exports in CY 2004. In 2005/06 however, this is likely to fall, as domestic U.S. production may rise and Mexican avocados continue to make inroads into the U.S. market.

Figure 3. World's leading avocado producers *



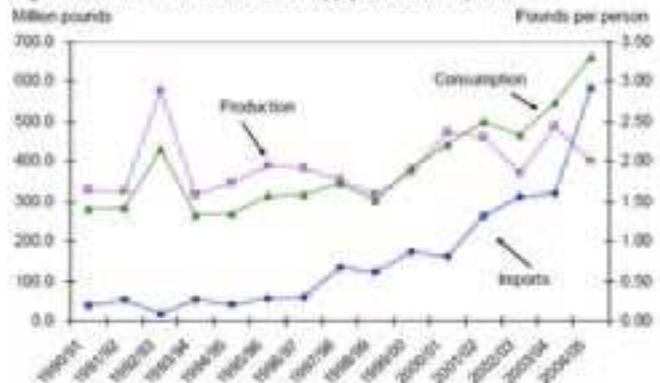
* Average share of 2003-2005 world production.
Source: Food and Agriculture Organization of the United Nations.

The volume of imported product has increased significantly over the previous decade, as shown below.

The Hass variety of avocado is the dominant and most popular type grown and imported into the United States.

All Hass avocados sold in the United States, whether grown domestically or imported are assessed a charge of 2.5 cents a pound under the Hass Avocado Promotion and Research Order. The purpose of this fee is to fund a marketing and promotion effort to increase the consumption of Hass avocados in the U.S. The order became effective in September 2002, assessments began on January 2, 2003, and may be partially responsible for the rapidly growing demand for avocados. Another reason for the increase in demand may be the growing Hispanic population. The overall growth in demand has exceeded the growth in domestic output, with imports increasing as a result.

Figure 7. Domestic fresh avocado supply and consumption



Source: World Horticultural Trade and US Export Opportunities, May 2006: Avocado Situation and Outlook for Selected Countries, Foreign Agricultural Service, USDA, 2006.

Fruit and Tree Nuts Outlook, FTS-321, March, 2006; Economic Research Service, USDA, 2006.

Canopy Management Update

By John Leonardi
Avocados Australia

In this article a summary of the canopy management field days, a brief description of canopy management strategies used in Chile and a copy of the paper titled “The development of canopy management strategies across Australia” as presented at the VI World Avocado Congress are included below.

Field Day Wrap Up

In 2007 Avocados Australia conducted a number of field days as a component of the extension activities of the national canopy management project (AV04008). These field days were held in 11 locations across Australia and gave growers an opportunity to observe a range of canopy management strategies and identify systems that may be suitable for their own production situations. The final field day was held at Avowest orchard at Carabooda north of Perth on 6 December 2007. Strategies involving selective limb removal, tree removal/replacement, plant growth regulator application and cincturing/girdling were discussed.

Thank you to everyone who has hosted the Canopy Management Field Days during 2007 including Agriexchange Pty Ltd; Avowest; Chinoola Orchards; Rob Farnsworth Pty Ltd; D & D Roche and Son; Lavers Orchards; Tinaroo Falls Avocado Trust; Smerdon Enterprises Pty Ltd; Donovan Avocados; I & R Philpott; Gala Orchards; Coastal Avocados; S & S Peruch and Balmoral Orchards.

Canopy Management Strategies in Chile

In many of the growing regions of Chile high planting density of ‘Hass’ at 3 x 3 m (1100 trees/ha) were common particularly on hillsides. One of the canopy management tools being implemented by growers in Chile is a form of cincturing. Cincturing involves the complete severance of the phloem on a limb or trunk of a tree and has been used in many horticultural crops to increase flowering and fruiting. When successfully carried out the wound will produce callus tissue and eventually heal, thereby restoring normal function of the limb or tree. Typically in the past cincturing had involved removal of a strip of bark up to 1cm wide. However, this can be too severe resulting in a decline in tree health and subsequent yield. Scoring which involves a single knife cut around the branch to sever the phloem is being used in Chile. 1-2 branches in the second year are scored during autumn to encourage early fruiting therefore reducing tree size. In addition, plant growth regulators such as Sunny®, Cultar® and NAA® are also being used to control tree size and increase cropping in these high density orchards.

Growers in Australia particularly in those in the Tri-State region and South-West Western Australia have been trialling this scoring technique. Branches in both young and older trees were scored in autumn to reduce vegetative growth and increase flowering and fruit set the following spring. Early results indicate increased flowering and reduced vegetative growth in the scored branch. However, a better

response may have been achieved in trees coming into an “off” year as there is a heavy flowering in all trees at these sites.

This paper was presented at the VI World Avocado Congress: The development of canopy management strategies across Australia.

Abstract

Canopy management is one of the major production issues confronting the Australian avocado industry. Cost effective means of tree size control to optimise light interception and penetration, maximise and maintain fruit quality and yield, and improve efficiency of harvesting and spraying operations are essential.

Avocado growers have adopted various strategies to manage tree size including selective limb removal; mechanical pruning; staghorned; tree thinning and removal; cincturing and plant growth regulator application. An analysis of several strategies was undertaken in the major avocado producing regions across Australia. At each study site, information on tree age, planting density and row orientation, the timing of flowering, vegetative flushing and harvesting was collected. The suitability of each canopy management system in terms of timing and cost of operations and its impact on productivity was determined.

In addition the effect of plant growth regulators, such as naphthalene acetic acid (NAA) on regrowth in pruned trees, uniconazole (Sunny®) on shoot growth, flowering and yield in staghorned trees, and prohexadione-calcium (Regalis®) on shoot growth and fruit yield and quality were also investigated.

1. Introduction

Due to increasing costs of production, avocado growers need to be able to maintain consistent yields of high quality of fruit to remain profitable. Cost effective measures to manage tree size is a significant challenge for the Australian avocado industry. The avocado tree must produce new growth each year to remain productive (Whiley and Schaffer, 1994). However, this continued growth will result in increased tree size that can eventually lead to orchard crowding and deterioration in fruit yield and quality. In addition, tree size presents a problem with regard to harvesting, and spraying for effective pest and disease control.

The main problem with overcrowded orchards is insufficient light (Stadler and Stassen, 1985). Light is critical for flowering and fruit production. Avocado growers have adopted various strategies to manage tree size and improve light interception and penetration, including selective limb removal (individual limbs are removed to maintain tree size and inter-row access); mechanical pruning (trees are pruned to form a hedgerow); staghorned (trees are pruned back to a stump and allowed to re-grow); tree thinning (alternate rows or trees within a row are removed as orchards begin to crowd) and tree removal (whole blocks removed after 10-15 years and replaced with

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new trees); cincturing (ringbarking of individual branches) and plant growth regulator application (to reduce vegetative growth and increase fruit size).

Plant growth regulators have been successfully used to manipulate vegetative growth, and increase flowering, yield and fruit size in avocado. Auxins such as naphthalene acetic acid (NAA) have been shown to control regrowth on avocado stumps following top-working (Boswell et al., 1976) and to minimise regrowth following pruning in 'Reed' avocado in California (Whiley and Anderson, 2002). Triazoles are a group of plant growth retardants that inhibit gibberellin biosynthesis (Davis et al., 1988). Within this group paclobutrazol and uniconazole have been reported to reduce vegetative growth and increase fruit size in avocado (Köhne and Kremer-Köhne, 1987; Köhne, 1988; Adato, 1990; Wolstenholme et al., 1990; Whiley et al., 1991; Erasmus and Brooks, 1998; Penter et al., 2000; Leonardi, 2001; Whiley, 2001). Prohexadione-calcium (Apogee®) also an inhibitor of gibberellin biosynthesis has been reported to delay the elongation of the vegetative shoot of indeterminate floral shoots, increase early fruit set (Lovatt, 2001) and improve yield (Whiley and Anderson, 2002) in avocado when applied at flowering.

The objective of the current research was to identify canopy management strategies that can be successfully implemented in the major avocado growing areas across Australia and to determine the best strategies in terms of cost/benefit to the grower. In addition the effect of the plant growth regulators, naphthalene acetic acid (NAA) on regrowth control in pruned trees, uniconazole (Sunny®) on shoot growth, flowering and yield in staghorned trees, and prohexadione-calcium (Regalis®) on shoot growth, yield and fruit quality were also investigated.

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2. Materials and Methods

2.1 Evaluation of canopy management strategies

2.1.1 Site selection

In Australia commercial avocado production occurs in a wide range of environments from the wet tropics of north Queensland (latitude 17°S) to the dry Mediterranean climate of southern Australia (latitude 34°S). A total of 16 sites were selected as case studies from the major production areas across Australia, including north Queensland, central/southern Queensland, northern/central New South Wales, the Tri-State and south-west Western Australia.

2.1.2 Data collection

Information on variety, tree age, planting density, row orientation and the timing of flowering, vegetative flushing, and harvesting was collected from each site. The timing and costs (\$/ha) of the canopy management strategies and the impact of these strategies on yield (t/ha), fruit size (pack-out figures) and quality (reject %'s) was collated. The effectiveness of each canopy management system in terms of cost of operation (\$/ha/year) and impact on yield (t/ha/year) was determined.

2.2 Plant growth regulator trials

2.2.1 Naphthalene acetic acid (NAA)

Two experiments were carried out to study the effect of NAA application on regrowth in pruned 'Hass' trees.

In Experiment 1, five-year-old trees in a commercial orchard located in northern New South Wales (lat. 30°S) were selectively pruned in December 2003. Branches, 2-3 cm in diameter were painted with acrylic paint or with a 0.5 or 1% NAA + paint formulation. Treatments were applied to the cut surface and 20 cm along the branch to 10 branches in each of two trees.

In Experiment 2, six-year-old trees in a commercial orchard located in central Queensland (lat. 25°S) were selectively pruned after harvest in June 2005. Branches 5-8 cm in diameter were either painted with acrylic paint, treated with a 0.5 or 1% NAA + paint formulation or hand sprayed with water, or a 0.5 or 1% NAA + water formulation. Treatments were applied to the cut surface and 40 cm along the branch to 10 branches in each of four trees.

In both experiments the number and length of regrowth shoots within and below the treated section of the branch were measured in 4-6 months after treatment. Statistical analyses were by ANOVA and the least significant difference (l.s.d.) test at $P \leq 0.05$ was used to separate treatment means.

2.2.2 Uniconazole (Sunny®)

A trial was established in south-east Queensland (lat. 27°S) to investigate the effect of uniconazole (Sunny®, Sumitomo Chemical Australia Pty Ltd) application on shoot growth,

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flowering and yield in staghorned 'Hass' trees. Trees were cut back to a stump approximately one metre above the graft union in July 2005. Foliar applications of 1 or 2% Sunny® were applied in February 2006 to young vegetative growth and in May 2006 prior to floral bud development.

Trees were sprayed to the point of run-off using a motorised, backpack spray unit at 1.1 litres per tree. An unsprayed control was included for comparison. There were seven treatments with five trees per treatment arranged in a completely randomised design. The effect of treatment on shoot growth and flowering was assessed in 10 shoots in each of five trees in August 2006. Fruit was harvested at maturity in May 2007 and the number and weight from each tree recorded. Average fruit weight was calculated from the data. Statistical analyses were by ANOVA and the least significant difference (l.s.d.) test at $P \leq 0.05$ was used to separate treatment means.

2.2.3 Prohexadione-calcium (Regalis®)

In 2004, a trial was established in central Queensland (lat. 25°S) to investigate the effect of prohexadione-calcium (Regalis®, Nufarm Australia Ltd; 100 g ai/kg) on shoot growth, yield and fruit quality in 'Hass' avocado. Foliar applications at 0.5, 0.75 and 1.0 g/l were applied to five-year-old trees at full-bloom on the 15 September and again two weeks later. Treatments were reapplied in 2005 on the 5 September and 10 days later.

Trees were sprayed to the point of run-off using 1.7 and 2.0 litres per tree in 2004 and 2005, respectively. An unsprayed control was included for comparison. There were seven treatments with six trees per treatment arranged in a completely randomised design. Data was analysed by ANOVA and the least significant difference (l.s.d.) test at $P \leq 0.05$ was used to separate treatment means.

Spring growth flush was assessed in 10 shoots per tree in December 2004 and 2005. Fruit was harvested at maturity in May 2005 and 2006 and the number and weight from each tree recorded. Average fruit weight was calculated from the data.

In May 2006, 20 fruit were harvested from each tree from all treatments, ripened at 20°C and assessed for quality. Fruit quality was assessed using the Avocare Quality Assessment Manual (White et al., 2001). Fruit firmness was assessed using gentle hand pressure, and the days to ripe (DTR) determined as the number of days fruit were stored at 20°C until ripe. Ripe fruit were then longitudinally cut into quarters, the seed removed, and the skin peeled from the flesh. The quarters were visually rated for the severity of rots and internal disorders as the percentage of flesh volume affected. The incidence or percentage of fruit affected with these rots and disorders were determined.

3. Results and Discussion

3.1 Evaluation of canopy management strategies

There are several canopy management strategies being implemented by growers throughout the different producing regions across Australia,

including selective limb removal, selective and mechanical pruning, staghorned, tree removal and plant growth regulator application. At many sites a combination of strategies are being used (eg. mechanical pruning, selective pruning and application of plant growth regulators).

A summary of each site including an orchard description (variety, year planted, tree spacing and density), canopy management strategies, length of the pruning cycle, and costs (\$/ha/year) and yield (t/ha/year) during the pruning cycle is presented in Table 1.

Canopy management costs ranged from \$430 to \$3922 per hectare per year depending on tree age, planting density and the strategies being implemented. Costs were generally highest at sites using plant growth regulators and in systems involving tree removal, staghorned and selective pruning where costs of mulching and removal of limbs was a major component.

The highest productivity was achieved at site 10 (28.5 t/ha/year) using mechanical and selective pruning techniques. Medium to high yields (>15 t/ha/year) were achieved using various methods of selective limb removal, selective and mechanical pruning and plant growth regulator application. Productivity was lowest (<7 t/ha/year) at sites involving major limb removal, staghorned and tree removal techniques. At these sites non-productive years significantly influence the productivity rating. For example at site 7 yields of 0, 1.1 and 7.8 t/ha were achieved 1, 2 and 3 years after staghorned the trees.

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Table 1. Summary of study sites used to evaluate canopy management strategies across Australia.

Site	Region	Orchard description (including variety, year planted, tree spacing and density)	Canopy management strategies	Length of pruning cycle (years)	Canopy management costs (\$/ha/yr)	Productivity since pruning (t/ha/yr)
1	North Qld	Shepard planted:1993 Spacing: 10 x 5m (200 trees/ha)	Selective limb removal	2000-2006 (7)	960	18.0
2	Central Qld	Shepard planted:1990 Spacing: 9 x 6m (185 trees/ha)	Selective limb removal, mechanical pruning and plant growth regulators.	2000-2006 (7)	1957	15.5
3	Central Qld	Shepard planted:1993 Spacing: 10 x 5m (200 trees/ha)	Mechanical/selective pruning and plant growth regulators.	2002-2006 (5)	940	15.4
4	Central Qld	Hass planted:1994 Spacing: 10 x 5m (200 trees/ha)	Selective limb removal, mechanical pruning and plant growth regulators.	2000-2006 (7)	2100	21.0
5	Central Qld	Hass planted:1993 Spacing: 10 x 5m (200 trees/ha)	Mechanical pruning, selective limb removal and plant growth regulators.	2002-2006 (5)	2530	17.4
6	Southern Qld	Hass planted:1993 Spacing: 12½ x 6m (133 trees/ha)	Mechanical/selective pruning and plant growth regulators.	2001-2006 (6)	2467	11.5
7	Southern Qld	Hass planted:1989 Spacing: 10 x 5m (200 trees/ha)	Staghorning and selective pruning.	2002-2006 (5)	1160	6.1
8	Southern Qld	Hass planted:1989 Spacing: 10 x 5m (200 trees/ha)	Major limb removal	2002-2006 (5)	540	6.9
9	Northern NSW	Hass planted:1994 Spacing: 7 x 5½m (260 trees/ha)	Selective limb removal and terminal pruning.	2001-2006 (6)	2550	9.8
10	Central NSW	Hass planted: 1993 Spacing: 7 x 3m (476 trees/ha)	Mechanical and selective pruning.	2003-2006 (4)	1000	28.5
11	Central NSW	Hass planted: 1999 Spacing: 9 x 5m (222 trees/ha)	Selective pruning.	2005-2006 (2)	1600	12.2
12	Tri-State	Hass planted:1998 Spacing: 6 x 3m (555 trees/ha)	Selective pruning to maintain row access. Tree removal – trees thinned to 12 x 3m (278 trees/ha)	2002-2006 (5)	430	5.5
13	Tri-State	Hass planted:1991 Spacing: 6 x 5m (333 trees/ha)	Selective/mechanical pruning and plant growth regulators.	2004-2006 (3)	3922	14.1
14	WA	Hass planted:1988 Spacing: 6 x 5m (333 trees/ha)	Selective pruning	2002-2006 (5)	1500	27.2
15	WA	Hass planted:1982 Spacing: 7 x 7m (204 trees/ha)	Selective limb removal, mechanical pruning, staghorning, tree removal and replanting	1998-2005 (8)	1641	11.4
16	WA	Hass planted:1997 Spacing: 7 x 3.5m (408 trees/ha)	Mechanical pruning, selective limb removal and tree removal	2000-2005 (6)	1100	12.2

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3.2 Plant growth regulator trials

3.2.1 Naphthalene acetic acid (NAA)

In both experiments NAA reduced the number and length of regrowth shoots in the treated section of the branch (Table 2). However in Experiment 1 regrowth occurred further down the branch. In Experiment 2 there was no difference in the number and length of shoots that developed below the treated area.

Table 2 Effects of NAA treatment on regrowth in pruned branches in ‘Hass’ trees. In Experiment 1 data are means of 10 branches from two, 5-year-old trees. In Experiment 2 data are means of 10 branches from four, 6-year-old trees. Means followed by the same letters in each experiment are not significantly different ($P > 0.05$).

Experiment 1 Treatment	No. of shoots in treated area (20cm)	Length of shoot (cm)	No. of shoots below treated area	Length of shoot (cm)
Paint only	3.8 a	89.6 a	0 b	0 b
Paint + 0.5% NAA	0.1 b	4.0 b	2.3 a	43.9 a
Paint + 1% NAA	0 b	0 b	2.2 a	41.8 a

Experiment 2 Treatment	No. of shoots in treated area (40cm)	Length of shoot (cm)	No. of shoots below treated area	Length of shoot (cm)
Paint only	2.9 a	151.8 a	3.2	98.9
Paint + 0.5% NAA	0.2 b	10.9 b	3.4	136.4
Paint + 1% NAA	0 b	0 b	3.8	101.8
Water only	3.0 a	140.9 a	3.2	100.3
Water + 0.5% NAA	0.2 b	17.3 b	3.3	129.9
Water + 1.0% NAA	0 b	0 b	3.0	112.4

3.2.2 Uniconazole (Sunny®)

All Sunny® treatments reduced shoot length and increased flowering in staghorned trees (Table 3). There was no significant effect of treatment on the number of fruit, average fruit weight and yield, although there was a trend towards an increase in fruit numbers and yield in trees treated with a 1 or 2% Sunny® in May.

Table 3 Effect of Sunny® treatment on shoot growth, flowering, number of fruit, average fruit weight and yield in staghorned ‘Hass’ avocado trees. Shoot growth and flowering data are

means of 50 shoots from five trees per treatment. Yield data are means of five trees per treatment. Means followed by the same letter are not significantly different ($P > 0.05$).

Treatment	Shoot length (cm)	% of shoots flowering	No. of Fruit	Av. fruit wt (g)	Yield (kg/tree)
Unsprayed control	88.8 a	60 a	25.8	267.0	6.8
1% Sunny® in February	51.1 b	96 c	41.0	262.8	10.4
2% Sunny® in February	58.5 b	84 b	29.6	267.7	7.9
1% Sunny® in May	62.7 b	96 c	63.2	261.1	16.3
2% Sunny® in May	64.1 b	96 c	66.4	273.8	17.8
1% Sunny® in Feb & May	58.9 b	94 c	45.6	270.2	11.9
2% Sunny® in Feb & May	55.3 b	96 c	34.8	260.8	9.0

3.2.3 Prohexadione-calcium (Regalis®)

Regalis® had no significant ($P > 0.05$) effect on yield or average fruit weight (Table 4). However, the product at all concentrations significantly reduced the length of the spring growth flush. The severity and incidence of stem rots and incidence of body rots was least in fruit harvested from trees treated twice with Regalis® at 1.0 g/l (Table 5).



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Table 4 Effect of prohexadione-calcium (Regalis®) on shoot growth, number of fruit, average fruit weight and yield in 2004/05 and 2005/06 in ‘Hass’ avocado. Shoot growth data are means of 60 shoots from six trees per treatment. Fruit yield data are means of six trees per treatment. Means followed by the same letter are not significantly different ($P > 0.05$).

Treatment	2004/05				2005/06			
	Shoot growth (cm)	No. of fruit	Av. fruit wt (g)	Yield (t/ha)	Shoot growth (cm)	No. of fruit	Av. Fruit wt (g)	Yield (t/ha)
Unsprayed control	12.3 a	416	219.5	18.1	12.0 a	412	208.2	17.0
Regalis® at 0.5 g/l	10.4 b	409	223.4	17.9	10.4 b	421	218.2	17.9
Regalis® at 0.75 g/l	8.9 c	475	214.2	20.1	8.8 c	516	208.6	21.1
Regalis® at 1.0 g/l	9.1 c	457	215.7	19.1	8.8 c	407	215.0	17.1
Regalis® at 0.5 g/l x 2	8.9 c	497	218.8	21.6	9.0 c	480	216.7	20.7
Regalis® at 0.75 g/l x 2	8.8 c	538	209.1	22.2	8.4 cd	441	208.5	18.3
Regalis® at 1.0 g/l x 2	8.9 c	401	233.6	18.3	7.9 d	422	228.2	18.7

Table 5 Effect of prohexadione-calcium (Regalis®) application on the severity and incidence of stem-end and body rots in ‘Hass’ fruit ripened at 20°C. Fruit was harvested in May 2006. Data are means of 120 fruit from six trees per treatment. Means followed by the same letters are not significantly different ($P > 0.05$).

Treatment	Stem-end rots		Body rots	
	Severity (% of flesh)	Incidence (% of fruit)	Severity (% of flesh)	Incidence (% of fruit)
Unsprayed control	1.82 a	27.5 a	0.53	17.5 a
Regalis® at 0.5 g/l	1.54 ab	17.5 bc	0.37	13.3 ab
Regalis® at 0.75 g/l	1.13 abc	15.0 bcd	0.27	8.3 bc
Regalis® at 1.0 g/l	1.00 bcd	11.7 cd	0.35	10.0 abc
Regalis® at 0.5 g/l x 2	1.64 ab	19.2 b	0.35	12.5 ab
Regalis® at 0.75 g/l x 2	0.75 cd	10.0 d	0.23	10.0 abc
Regalis® at 1.0 g/l x 2	0.31 d	9.2 d	0.13	2.5 c

4. Conclusions

The objective of this study was to identify canopy management strategies that can be successfully implemented in all major avocado growing areas across Australia. A range of canopy management strategies were analysed including selective limb removal, selective and mechanical pruning, staghorning, tree removal and plant growth regulator application. The decision on which canopy management system growers employ often depends on geographic location.

In north Queensland, central Queensland and the warmer coastal areas of south-east Queensland and northern New South Wales the crop can be harvested up to several months prior to flowering. In these growing areas mechanical pruning can be implemented after harvest to establish tree size and shape. A light mechanical pruning to maintain tree shape and reduce the length of the spring growth is often done during early summer. In addition, plant growth regulators (Sunny®) can be applied at flowering (in the absence of mature fruit) to increase fruit size and reduce the spring growth flush. At these sites selective limb/branch removal strategies to reduce tree height and to improve light penetration are also used and in many cases a combination of both mechanical and selective pruning are being implemented.

In cooler, temperate climates of the hinterland areas of southern Queensland and northern New South Wales, central New South Wales, the Tri-State region and south-west Western Australia it is normal for the tree to carry two crops for a period of time (mature fruit from the previous season as well as current season’s fruit). In these regions the decision on when to prune is often more difficult. In many cases growers perform pruning operations after harvest and when trees are going into an “off” year so branches can be pruned with minimal fruit loss. However due to the light crop load (in an “off” year) managing

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the regrowth from these pruning operations can be more difficult. Growers in these regions typically adopt a selective limb removal method to reduce tree size and improve light penetration. However strategies involving mechanical pruning, staghorning, tree removal and plant growth regulators have also been used.

The results of the plant growth regulator trials indicate that naphthalene acetic acid (NAA) reduced regrowth in pruned branches; uniconazole (Sunny®) reduced vegetative growth, increased flowering and tended to improve yields in staghorned trees; and prohexadione-calcium (Regalis®) reduced the spring growth flush and improved fruit quality when applied at flowering. At this stage only Sunny® is registered for use by the Australian avocado industry to increase fruit size and reduce vegetative growth.

5. Acknowledgements

Thank you to all growers who provided information on their canopy management strategies. This project is funded using avocado grower levies which are matched by the Australian Government through Horticulture Australia.

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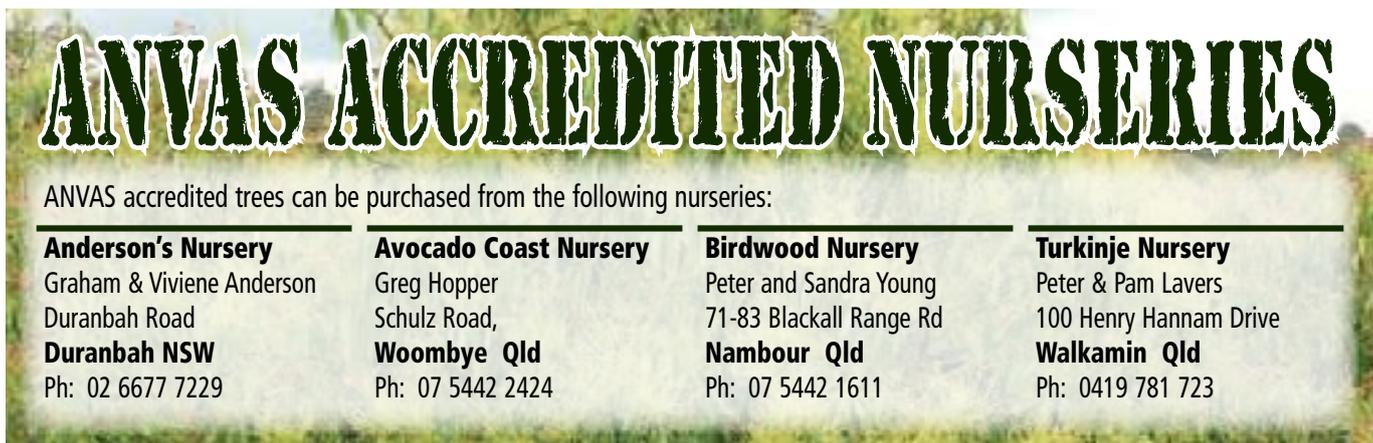
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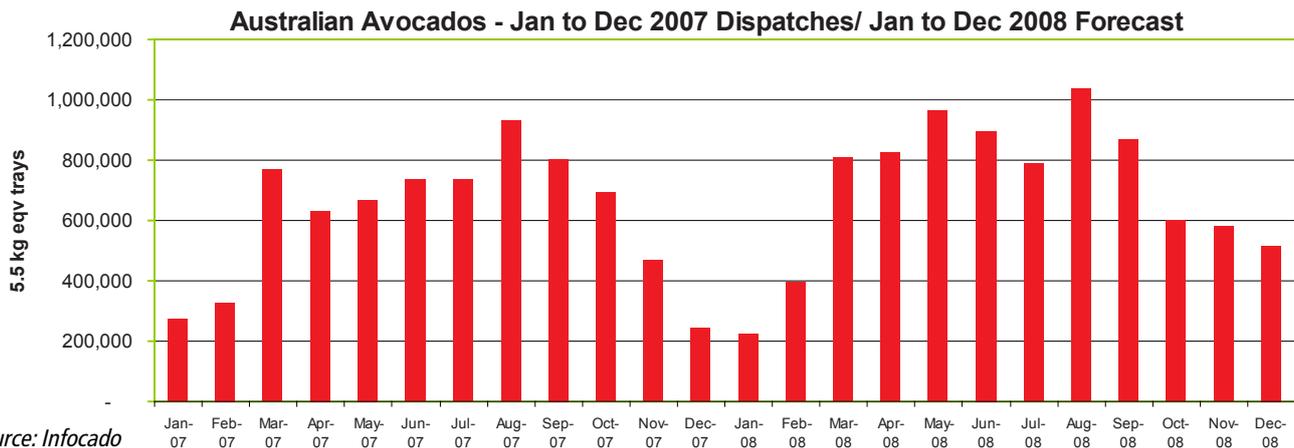
Infocado Update

In the past three months (September through December 2007), the Australian market has absorbed approximately 1.4 million trays of Australian avocados and 1.1 million trays of New Zealand avocados. This equates to approximately 192,000 trays per week.

During the three month period prior (July through September 2007) approximately 2.5 million Australian avocados were marketed (ie. 190,000 trays per week). The retail price however in this most

recent period has risen by approximately 50c per piece of fruit. This highlights the difference in demand patterns between the cooler and warmer months of the year and subsequently the gains to be made by increasing consumption over the cooler period.

Crop forecasts by growing region for the year January 2008 to December 2008 (as at 31st December 2007)



Source: Infocado

January to December 2008 Australian Avocado Production Estimates 5.5kg eqv trays

Source: Infocado

North Queensland	1,443,366
Central Queensland	3,499,375
Sunshine Coast	700,000
Southern Queensland	943,892
Northern NSW	372,353
Central NSW	486,075
Tri State	219,176
WA	834,355
Total	8,498,593



Illustrated below is a table indicating the crop flow of New Zealand export avocados. The overall NZ export crop estimate is 2.8 million trays of 5.5kg tray equivalents of fruit for the 2007/2008 season. Up to the end of December 2007 they were approximately half way through their estimated program with approximately 75% of that fruit imported into Australia.

New Zealand Avocado Exports—Forecast v Import Statistics (5.5kg eqv trays) (Source: Australian Customs, Japan Customs, AvoHQ)

Export Destination	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total to date
NZ Export Forecast		100,000	300,000	550,000	550,000	500,000	300,000	120,000		2,500,000
Australia	355		163,000	471,000	464,166					1,098,521
USA		51,500	71,500	26,500	63,636					213,136
Japan		26,000	43,000	33,000	Avail end Jan					102,000
Total	355	77,500	277,500	530,500	527,802+					1,413,657

News from around the world

US Avocado demand continues to expand

Avocado demand in the United States has risen rapidly the past decade with Americans consuming an average of 3.3 pounds of avocados per person. That's almost double the consumption levels seen 10 years ago. At the same time, domestic avocado production, most of which comes from California, increased about 18 percent a year.

But the wildfires that swept through Southern California this past October have raised concerns about the fires' impact on the state's avocado crop, which was in the midst of transitioning to the new crop season, says a report from the National Agricultural Statistics Service.

Of the seven counties that were declared emergency disaster areas due to the wildfires, five have the largest acreage in avocado production — San Diego, Ventura, Santa Barbara, Riverside, and Orange.

"The California Avocado Commission initially indicated that around 4,000 acres of avocado production, mostly in San Diego County, were affected by the wildfires in varying degrees of damage," the NASS report says.

That's about 6 percent of California's total bearing acreage for avocados. San Diego County had over 26,000 bearing acres in 2006-2007.

Damage assessments are still ongoing and could take several weeks to determine the full scope of the damage to avocado orchards and its impact on the state's avocado industry, the report says. The fires burned down avocado trees and production infrastructure such as irrigation lines.

But another problem came from the strong Santa Ana winds. The winds that drove the fires also knocked fruit off the trees, affecting remaining fruit from the 2006-2007 crop as well as new fruit for the 2007-2008 season, says the report.

The severity of the wildfire damage varied across the affected orchards with some orchards completely devastated, others partially burned, and some reported only superficial scorching of foliage.

Prior to the wildfires, the industry expected 2007-2008 production to improve from last season's below-average crop.

"Based on NASS estimates, the 2006-2007 California avocado crop was only 135,000 tons, the smallest since 1989-1990, when only 105,000 tons were produced. Production declined in 2006-2007, partly due to the record-large crop harvested in 2005-2006 that left avocado trees less productive last season and because of crop damages sustained from freezing temperatures last winter," the NASS report says.

New estimates from the California Avocado Commission indicate that the 2007-2008 crop will likely be 10 percent smaller than initially projected. Before the fires, crop size was projected by the CAC to be up 33 percent from last season, but now production growth is likely to be reduced to about 20 percent, the report says.

"If realized, this should provide around 162,000 tons in 2007-2008,

up from the 135,000 tons reported by NASS in 2006-2007 — slightly below average," the report says. Source: Central Valley Business Times

Avocado imports ride out rough weather

Despite battling turbulent weather conditions, the South African and Chilean avocado associations have both reported export volumes into the UK to be just as strong as last season's.

South Africa's avocado marketing campaign has been running for 12 years in the UK, and reached its peak, in line with its crop. The South African Avocado Growers' Association (SAAGA) has reported this year's export volumes have even been up on start of season predictions. "The volume of (South African) avocados entering the European and UK market in the summer of 2007 was approximately double that of seven years ago," revealed Derek Donkin, chief executive of Subtrop.

Taking up the UK supply of avocados from October through to late winter is Chile, where the weather has been crueller to the 2007 crop: the snow and cold this July is expected to diminish the harvest by almost 50%. However, the Chilean Hass Avocado Association (CHAA) has stated the UK market is top priority and imports to Great Britain will be unaffected, and possibly even reach the record 7,000 tonnes shipped in last season. "Volumes of Chilean Hass avocados are down on last year, but as usual we have ensured the shipments we are making will be of the best quality," said Adolfo Ochagavía, president of the CHAA. "Chile won't give up and will do the very best for its customers."

It is the third year CHAA has promoted in the UK media and supermarkets, and the 2007 season will see in-store promotional activity, trolley posters and on-pack leaflets. Source: Talking Retail

Popular Hass avocados exempted from fruit fly spraying

The boundaries of an agricultural quarantine triggered by Tuesday's discovery of five Mexican fruit flies in the northeast end of the city won't be determined until next week, California Department of Food and Agriculture spokesman Steve Lyle said Friday.

State officials said they're encouraged that no new flies have been found since a county worker discovered the female fruit flies Tuesday in two traps that are monitored weekly. Lyle said the state agriculture department confirmed Wednesday that they were Mexican fruit flies.

Lyle said the state will begin dropping about 4.5 million sterile male Mexican fruit flies in the quarantine area each week by mid-November in an effort to eradicate the pest. Pairing a fertile female with a sterilized male works to stop future generations of the fruit fly, he said. Meanwhile, county officials said that Hass avocados -- the most prevalent variety of the fruit grown in the county -- will be exempted from spraying.

"The good news is that this quarantine will be a lot less burdensome than the last one in Valley Center," said county Agriculture Commissioner Bob Atkins, referring to an infestation five years ago in Valley Center that sparked a 10-month quarantine of more than 130 square miles

*News from around the world
continued*

and cost growers an estimated \$2 million in crop losses.

The female Mexican fruit fly destroys more than 50 kinds of fruit by injecting its eggs beneath a fruit's skin. The resulting maggots eat the fruit's flesh, causing it to rot and fall to the ground, where the pupae crawl out of the fruit and into the ground. Adult flies emerge from the ground in 12 to 25 days.

Officials said this week they trapped five of the destructive pests in two locations near Bear Valley Parkway and Oak Hill Drive in Escondido.

Atkins said he anticipates a quarantine of at least 81 square miles, based on boundaries set in previous quarantines in the county. Lyle declined to speculate on the eventual size of the quarantine area.

At any rate, growers and nurseries inside the quarantine area will not be allowed to sell or ship untreated fruit and agricultural products. Hass avocados inside the quarantined area won't be treated with pesticides because their thick skin prevents the fruit flies from being able to penetrate them, officials said.

Eric Larson, executive director of the San Diego County Farm Bureau, said that's good news because Hass avocados make up the majority of area avocado crops.

Of the 26,012 acres of avocado crops countywide, 24,149 of them are Hass crops, according to the Farm Bureau's 2006 crop report. Source: North County Times

**Extensive research to enhance
avocado production in Colombia**

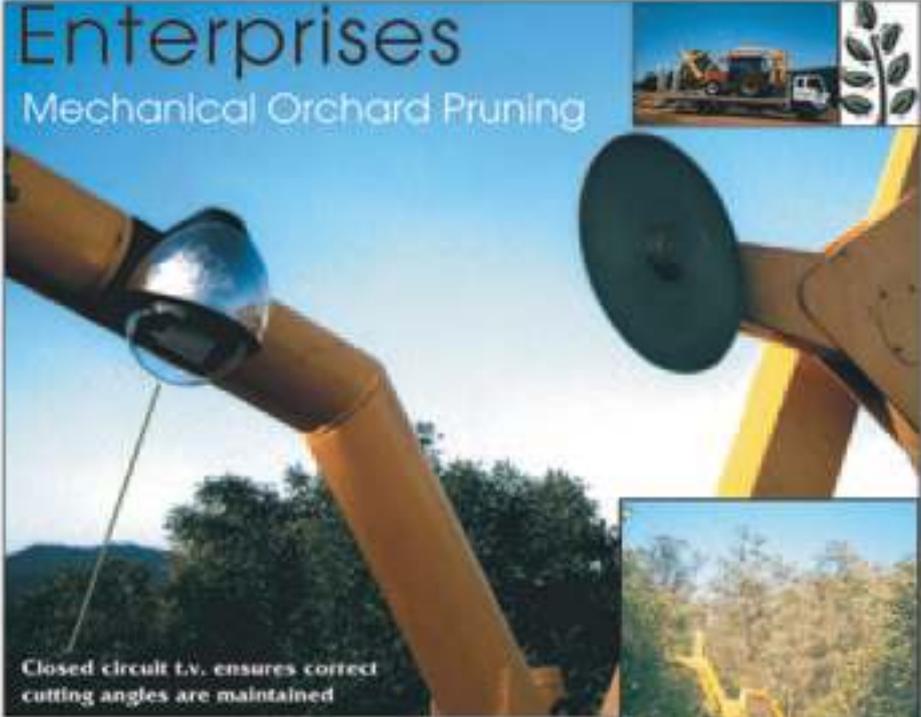
A group of researchers at the First Symposium of Tropical Fruits developed a comprehensive investigation on the avocados varieties cultivated in Colombia. The production of the avocado gender Persea cultivated in Colombia takes place between 300 and 2500 meters above sea level and includes more than 150 varieties. The Colombian specie comes from Central America (Guatemala or Mexico) and the Caribbean. In Colombia is possible to develop the following varieties: Lorena, Trinidad, Booth-8, Fuerte, Hass, Trapo, Santana, Colinred and Ettinger. Temperature for the development of the varieties depend on the origin of the variety. For example Guatemalan avocados are more resistant to plagues while Mexican avocados are more tolerant to cold weather.

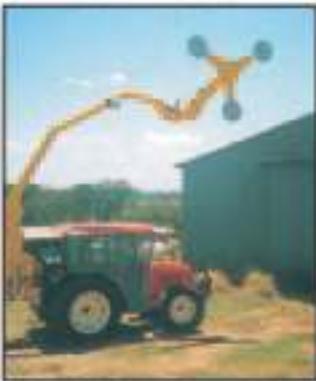
A well distributed level of 1200 mm rain and 1500 hours of sun per year should be good enough for the development of the plant. Extensive droughts and excess of water reduce the yield and in some cases can generate falling of fruits. Excess of humidity can be also against the plant development, since the trunk can develop fungi or other diseases.

This research gives a technical analysis of the needs for the improvement of avocado production in Colombia.

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News from around the world
continued

Calavo Adopts PakSense Temperature Monitoring Labels

PakSense, Inc. has announced that Calavo Growers, the global leader in packaging and marketing fresh and processed avocados and other perishable food products, has adopted the company's TXi™ Label to track time and temperature of all products during shipping. PakSense Labels will be used on a wide spread scale on all avocado shipments as well as shipments of fresh and frozen guacamole and other diversified product lines such as papayas. Use of the PakSense Labels, combined with Calavo's ProRipeVIP® acoustic firmness technology and other quality assurance programs, will ensure that Calavo customers consistently receive the highest quality products possible.

At the forefront of quality control, Calavo's ProRipeVIP® acoustic sensor technology uses sound waves to measure the firmness and weight of avocados and enables Calavo to accurately sort fruit according to degree of ripeness and size. This enables Calavo to offer consistent products to its customers. Now, PakSense time and temperature labels will be used during shipping to help ensure the cold chain is maintained all the way to the customer, essentially extending quality assurance into distribution channels and completing the quality control loop.

"PakSense Labels help verify that temperature anomalies during shipping do not compromise the integrity of our product and are our eyes and ears when our product is outside of our direct control," said

Lee Cole, Chairman of the Board, President & CEO at Calavo. "This is another element in our quality control system and cold chain management that will make sure customers receive from Calavo the most wholesome and highest quality fresh & frozen products in the world."

"We adopted the PakSense Labels because of their ease of use and the fact that the data is secure from any editing," added Mr. Cole. "We were especially impressed that the PakSense Label embeds a perpetual clock rendering temperature data every minute, versus other solutions that sample temperature every seven to eight minutes. This gives us incredibly detailed data that is digitally portable and secured through chip encryption."

PakSense Labels, which are encased in food-grade packaging, are small enough to be placed inside Calavo containers where they collect surface temperature of product versus general ambient temperature information. An added benefit is that PakSense Labels will not bruise or otherwise damage fruit like larger data recorders.

Calavo is the latest company to adopt the award-winning PakSense TXi Label. Albertson's LLC recently announced that PakSense temperature monitoring labels would be included on all produce, fresh meat, and seafood shipments.

About the PakSense TXi Label

PakSense manufactures the award-winning TXi Smart Label, which monitors temperature and time of a perishable item through distribution. The labels are a low-cost alternative to traditional temperature monitoring devices and are easy to use. LEDs indicate if temperature abuse has occurred and all data collected by the label can be downloaded and graphed. PakSense Labels provide incredible insight into what happens to products during distribution, enabling users to make better food quality and safety decisions. The PakSense TXi Smart Label was named runner up in the 2006 Wall Street Journal Technology Innovation Awards in the technology design category. Source: CALAVO



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Avocados from Mexico figures by APEAM

In the report of management by the Association of Growers/Exporters of Avocado from Michoacán-México, this country continues leading exports to the US. At the campaign 2006/2007, from total consumption of avocados in the US, 37,66% belonged to Mexico, followed by Californian avocados (35.73%) and Chilean avocados (26.61%). This means for México an increasing 28.84% between the campaign 2005/2006 and the campaign 2006/2007. According to prices the average producer price in Mexico was \$ 0.95; meanwhile in the US it was \$ 1.20.

Information provided is General Advice only and does not take into account any individual's objectives, financial situation or needs. You may wish to seek your own professional financial advice. Before acquiring an AustSafe Super Product, a PDS should be obtained. *Based on the Balanced Plan returns compared to SuperRatings Survey over 5 years to 30/6/07. Past performance is not indicative of future performance.

News from around the world
continued

Growers (4,240) and cultivated area (44,271 has) grew 19% and 11% respectively in relation to the campaign 2005/2006. This was mirrored with an increasing (29%) of the volume sent for exports with 166.830 tons. It is important to take into account that since February 2007, all states in the US opened access the year round for Mexican avocados.

Projections are also optimistic. APEAM announced that the campaign 2007/2008 expected exports will reach 200,000 tons, this would mean a market share of 46% in front of Chilean 18% and Californian 36%. Source: APEAM

Wal-Mart to Open Its 3000th International Store

Wal-Mart Stores, Inc. is celebrating the opening of its 3000th international store, a Wal-Mart Supercenter in Sao Paulo, Brazil. Since opening its first international store in Mexico in 1991, the Wal-Mart International Division has grown to become a \$77.1 billion business that, standing alone, would rank as the world's fifth largest retailer in terms of sales revenue.

"The opening of Wal-Mart's 3000th international store marks a significant milestone for our business outside the U.S.," said Mitch Slape, senior vice president of International Business Development for Wal-Mart Stores, Inc. "In just 16 years, the Wal-Mart has gone from just one international retail location to 3,000, with nearly 600,000

associates serving 49 million international customers each week. In the last seven years, we've had a compound annual growth rate of 27.4 percent. These are tremendous achievements by any standard."

Wal-Mart's first venture outside the U.S. was the 1991 opening of a Sam's Club in Mexico. The following year the company entered Puerto Rico. In 1993, Wal-Mart formed an international division, setting the stage for expansion into Canada in 1994, Argentina and Brazil in 1995, and China in 1996. Since then, the company has seen significant growth in sales and earnings through entry into markets like the United Kingdom and Central America. Today, Wal-Mart operates stores in 13 markets outside the continental U.S. under some 50 different banners, and in August, announced plans to open a wholesale cash-and-carry operation in India by the end of next year.

"In the 1990s we were still learning how to compete globally," Slape said. "In 1999, we embarked on changes to our international strategy that led to significant growth in sales and earnings, including entries into the United Kingdom, through our purchase of ASDA, and Japan, through Seiyu. In the last year, we have entered a third phase of growth, where we are committed to unlocking the value of our international business. To do this, we're utilizing a three-part strategy. The first is portfolio optimization, which means making the right investments, divesting businesses in markets that have not been right for us, and expanding organically and through acquisition.



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News from around the world continued

“The second part of the strategy is global leverage, working across our international markets to drive home value through our business assets, our capabilities, and our relationships,” Slape continued. “This year, we added a third element to our international strategy, a plan for winning in each market where we operate. We look to have a distinctive position in the marketplace to sustain leadership, and ultimately generate material shareholder value. To do this, we will continue to be obsessed about the local customer, leverage our global scale, transfer know-how and develop the best local and global talent. Source: money.cnn.com

Big dry hits New Zealand fruit growers

A hot, dry January has left Bay avocado growers desperately hoping for rain. One grower said he had been waiting 25 days for rain, with the last rain of 8mm falling on December 21.

Rodger Bagshaw, manager of Goldwood Orchard between Waihi Beach and Athenree, manages 18 hectares of un-irrigated avocados and 36 canopy hectares of irrigated kiwifruit.

“We’d give our eye teeth for rain. I don’t remember anything like this, not in recent years,” he said. Predicted showers early next week were unlikely to make much of a difference, Mr Bagshaw said.

“We need at least 25 to 30mms of rain. Even with irrigation, it can only do so much. It’s not the same as natural rain ... It’s part of the fun of horticulture though, working with God.” Katikati avocado grower John Cotterell has had irrigation for two-thirds of his eight-and-a-half hectare orchard for the past five years.

He said it was during dry, hot spells such as the one at the moment he was thankful for making the investment. “We are virtually irrigating every two or three days,” he said. Mr Cotterell also manages a 40-hectare avocado orchard which has to be irrigated every four or five days.

He said by his own measurements, his orchard, on a ridge in Walker Road West, had received 1805mm of rain up until Christmas last year, and another 600mm had come from his own irrigation. Lack of rain is not helped by the fact the Bay’s avocado industry has been extremely fickle for the past few years, Mr Cotterell said.

“At the moment, I’m looking at no crop for next season. The whole industry in the Bay of Plenty is on one year and off the next. It’s bi-annual anyway but we seem to get a crop one time, and then not the next.” He said many growers did not have irrigation because of a combination of the expense and the fact a lot of growers seemed to survive without it.

John Schnackenberg, chairman of the NZ Avocado Growers’ Association, said the weather had had positive and negative effects. No rain meant weekly harvest targets for local and export markets were being met, but it also meant a “higher probability” of fruit drop.

Mr Schnackenberg said most avocado growers did not have irrigation systems and lack of rain did put the trees under stress. “Growers’ trees will be struggling if they don’t have irrigation. Avocado trees

need a decent quantity of water over spring and even summer.” Mr Schnackenberg said all growers could do was put mulch under the trees to retain as much moisture in the soil as possible. Prolonged dry weather would reduce the fruit for next year, Mr Schnackenberg said.

Graham Wiggins, president of NZ Kiwifruit Growers’ Incorporated, said Bay kiwifruit growers had had in comparison, a “dream month” so far. “It’s been very good. We do require sunlight hours for the fruit. While some [kiwifruit growers] would have experienced acute dryness, most do have irrigation. Kiwifruit in the Bay has been around for a number of years and the roots [of the plants] are well down.”

January has so far been a hot, dry month for Tauranga _ with just 0.8mm of rainfall. The average January rainfall is 72.8mm. Climate scientist Dr Jim Salinger said the conditions were typical of the La Nina weather pattern. The MetService is predicting fine weather for Tauranga this week, with showers developing next week. Source: Bay of Plenty Times

Malaga firms began investment to produce in Morocco

Firms from Malaga invested in Morocco due to lower prices of the land and the availability of water. Although some investments began two decades ago, the current trend is higher. The subtropical products with high interest are mangoes and avocados. Production of subtropicals reaches 1,500 hectares only, there is a huge potential for new developments.

Miguel Abad is one of the first Spanish investors in Morocco where he founded a plantation of 60 hectares of strawberries in 1989, nowadays he has 8,000 hectares. Mr. Abad is reconvertng to subtropicals in the regions of Kenitra and Larache (100,000 plants and he expects an increase of an additional 150,000 plants), with the production going to the domestic market.

In the region of Axarquía, Mr. Abad and his family count with their 250,000 plants between sub-tropicals (1,5 mln of avocados, mangoes and other sub-tropicals) and ornamentals exporting to Spain (75%) and the remaining to Portugal, Italy and Tunesia. The 60% of their whole production is certified organic.

Other investors from Huelva and Almeria are also participating in the Spanish production in Morocco and there is a special interest from investors from Andalucia. Source: Fresh Plaza

Mexican avocado exporters group sues CDF

A Mexican avocado exporters group has sued the California Department of Food and Agriculture on allegations the state illegally obstructed the importation of the fruit from Mexico.

The Asociación de Productores, Empacadores y Exportadores de Aguacate de Michoacán AC (APEAM) filed the lawsuit Jan. 11 2008 in Sacramento County Superior Court. The association has a membership

*News from around the world
continued*

of several thousand growers, packers and exporters of Hass avocados, the group said in the lawsuit.

Avocado imports from Mexico were banned for more than 90 years because of concerns about the spread of agricultural pests. U.S. officials agreed to allow Mexican avocados into California starting in 2007.

The suit alleges California officials illegally inspected and turned around trucks transporting avocados from Mexico, costing the group \$4 million in profits. It also claims the group paid \$2 million in advertising and marketing costs to promote the opening of the California market to Hass avocados from Mexico. Source: Sacramento Business Journal

Peru's Avocados to Enter the US Market in 2008

The US Animal and Plant Health Inspection Service (APHIS) reported to Peru's National Agrarian Health Service (SENASA) that Peruvian avocados would enter the US market in the last quarter of 2008, announced the head of SENASA, Oscar Domínguez.

In his statements to Andina news agency, Domínguez said that the conclusion of this process, which has taken more than six years of paperwork, is really important for Peruvian agriculture.

"Although there are some pending requirements to be presented during

the first quarter of 2008, the date was brought forward to January 15 of next year," said Domínguez.

Some of the documents needed to be presented to the US APHIS are reports on the areas where avocados are cultivated as well as the report on certain plagues that attack avocado trees; both reports are almost finished.

"Specialists have been preparing these reports for weeks, and they will have them finished as soon as possible," assured the head of SENASA.

Domínguez also explained that the next steps were public consultation in the United States, the issuing of the phytosanitary requirements to Peru and the corresponding elimination of phytosanitary barriers for Peruvian avocados.

When APHIS visited Peru last August, the US authority announced that this process was a national priority for the US, stating that it was of utmost importance on their agenda. Source: Living in Peru

US Avocado growers have worst year in decades

It's been the worst year in decades in the heart of the nation's avocado country.

Devastating wildfires and winds in October charred groves that had

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News from around the world continued

just started to recover from a severe freeze last winter. Some growers are now wondering if they should stay in business, or surrender their market share to mounting imports from Mexico and Chile.

“Mother Nature just seems to be against avocados this year,” Carl Griffin, 64, said as he traipsed through his San Diego County grove, where the ground was littered with shriveled, leathery husks of charred or unripened fruit.

Griffin lost more than 600 trees in the wildfires that claimed 10 lives, destroyed nearly 2,200 homes and blackened about 800 square miles across Southern California.

Many of his surviving trees have been cut back to stumps and painted white to prevent sunburn on the exposed wood.

Trees damaged by the fires will need three or four years to come back, and it could take as long as 10 years for production to return to 2006 levels, according to Mike Sanders, a veteran grove manager in San Diego.

Meanwhile, Americans’ appetite for avocados is expected to grow beyond the billion pounds a year now consumed.

Farmers are now paid about a dollar a pound for the fruit, with each acre of trees yielding about \$3,768 in 2007 -- the lowest figure in a decade.

“People who thought they could pencil out a living at those prices

are really struggling, and they’re going to need to get out,” said Guy Witney, a spokesman for the California Avocado Commission. “Once acreage is lost now, our thought is that it will be lost forever.”

A comeback by growers will also be complicated by a 30 percent water cut imposed by officials because of drought and a court ruling that slashed supplies from the Sacramento River Delta.

Despite the problems, Americans probably won’t see a significant impact on the price or supply of avocados as they snap up bags of the purple-black fruit at the grocery store to make guacamole on Super Bowl Sunday.

Experts said the decline in California-grown avocados will be easily offset by imports from Mexico and Chile.

In past years, U.S. farmers have grown about half of the avocados consumed in this country.

Much of that fruit comes from small groves in San Diego County owned by individual growers such as Griffin, who are retired and live on their property, or by business owners who aren’t completely dependent on avocados for their livelihood.

In San Diego County alone, the wildfires caused an estimated \$25 million in damage to avocados, according to the county farm bureau. Griffin expects to send just 25,000 pounds -- a quarter of his usual harvest -- to market.




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Art Bliss, a grower in Ventura County, said wind losses also have hurt farmers who didn't lose any trees to fires.

They were counting on the new crop to make up for losses suffered after a severe freeze in January 2007 iced avocados on the verge of being harvested.

The freeze cut the state's production to just 237 million pounds last year from 550 million pounds in 2006, according to the California Avocado Commission.

In San Diego County, Sanders said many have scrambled to get enough pipe to replace irrigation systems melted by the wildfires and tried to arrange additional financing from banks. Source: Business Week

Exports of RP fruits to New Zealand increase

The Philippines fruits particularly bananas, pineapples and avocados boost the country's agro-based products exports to New Zealand generating US\$2.5 million for the first half of the year, Agriculture Secretary Arthur Yap said in a report to President Gloria Macapagal-Arroyo.

Yap said New Zealand Ambassador David Pine himself acknowledged that the increase was due to a "rise in the value of bananas and plantains (and) significant increases in the sales of dates, figs, pineapples and avocados."

He said data from the National Statistics Office (NSO) also showed exports of fresh bananas to New Zealand "rose by almost two-folds to US\$986,480 in June compared to the same period last year" while exports of fresh pineapples also grew by 189.27 percent from US\$48,415 in June 2006 to US\$140,049 in June 2007.

He expects a growth in the exports of agri-based products to continue after nine New Zealand-based importers and distributors have pledged to buy over US\$30 million worth of fresh and processed agro-fishery exports from the Philippines during a product exhibit and selling mission conducted by the Department of Agriculture (DA) on the sidelines of the President's state visit last there last May.

Yap said the New Zealand buyers will import Philippine products such as mangoes, bananas, pineapples, dried mangoes, banana chips, desiccated coconut, canned sardines, ready-mix sauces, dried anchovies and squids, pili nuts, biscuits, juice in tetra packs, spices (chili and tamarind), fresh coconut and fresh coco juice.

He said the buyers include Fusion Marketing Ltd., Ashon Ventures (NZ) Ltd., Tres Marias Trading Ltd., Panamex Pacific Exporters and James Crisp Ltd., a known importer and distributor of food ingredients and brand developer for food products in the New Zealand and Australian markets.

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Key contacts: _____

Preferred address (postal): _____

Address of property (if different): _____

Contact Details

Business phone: _____

Home phone: _____

Fax: _____

Mobile: _____

Email: _____

Corporate Structure

How would you describe the nature of your operations (please circle)?

Individual	Partnership	Company Trust
Lessee	Cooperative	Other (please specify)

Please indicate the area of property that you crop for avocados (please circle)

0.5 - 5 ha	6-19 ha	20-49 ha	50-99 ha
100-149 ha	150-199 ha	200-499 ha	500 ha+

Special Interests

Please tick your main areas of interest from any of the following:

- | | |
|---|--|
| <input type="checkbox"/> Consumer information | <input type="checkbox"/> Production management |
| <input type="checkbox"/> Environmental management/ sustainability | <input type="checkbox"/> Quality Assurance |
| <input type="checkbox"/> Organic farming systems | <input type="checkbox"/> Technology/innovations |
| <input type="checkbox"/> Water management | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> Field days | <input type="checkbox"/> Supply chain management |
| <input type="checkbox"/> Pest management | <input type="checkbox"/> Key political issues |
| <input type="checkbox"/> Food safety | <input type="checkbox"/> Other (please specify) |

Payment Options

Grower Membership of Avocados Australia is \$110 pa (including GST). You can pay your membership by cheque or credit card. To pay your membership fee, please choose one of the following options:

Cheque

Please find enclosed a cheque for \$110.00 made payable to Avocados Australia Ltd.

Please charge \$110.00 to my credit card. Details are listed below.

Credit card (please circle):

Bankcard MasterCard Visa

Credit card number: _____

Name on credit card: _____

Expiry date: _____

Signature: _____

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Avocados Australia Ltd adheres to privacy rules with respect to the way we collect, use, secure and disclose personal information. Please indicate below (tick) if you do not wish to receive additional information.

I do **not** give Avocados Australia Ltd permission to allow my postal contact details to be accessed by other organisations other than Avocados Australia Ltd which offer beneficial products and services.

•NB - No personal details other than name and postal address will be given out under any circumstances.

Once you have completed this form please place it in an envelope addressed to:

Avocados Australia
Reply Paid 663
Stones Corner Qld 4120

(no stamp required within Australia):

For more information or assistance please go to

www.avocado.org.au or call on **07 3391 2344**



News from Around the World

continued

and the consumer can lose out.

Kiwifruit are no exception to the rule, but now a machine developed to bring the fuzzy gold to market in prime condition is likely to have application in other orchards.

The new machine, which could help plug holes in industry pockets and allow greater precision in marketing, has been developed by the School of Engineering and Technology at Massey University.

It is an automatic kiwifruit packaging system that will benefit buyers as well by ensuring they get the grade of kiwifruit they require at the right stage of ripeness.

The system, designed by Dr Rory Flemmer, was developed in conjunction with kiwifruit marketing organisation Zespri, in response to an industry shortage of kiwifruit pickers and packers.

Predictions last week suggested that off-shore fruit loss has accounted for a \$19 million reduction in returns to growers and service companies.

Dr Flemmer says the new machine can grade to within 0.1 gram, use artificial vision to grade to Zespri standards, including detecting blemishes and soft spots, labelling, picking and packing complex orders.

“The robot will not only reduce packing costs but will inspect and pack more consistently for 24 hours every day,” he says.

“It will also collect data that will enable coolstore operators to decide which fruit to market and at what time.”

Information gathered can be used to provide custom-packed fruit for each market, and also to provide data on the kiwifruit as picked.

“For example, we will know how much fruit is coming in too large or small, too ripe or too blemished,” Dr Flemmer says.

Dr Flemmer and students from the school custom-designed and built the machine, calling on his international experience automating production at companies including Bausch & Lomb, Nissan and General Motors.

During tests, only one lane is being used, but the plant can run up to four lanes in each machine, packing 250 to 400 trays per hour.

The next step is production of an automated robot, which will be able to pick the kiwifruit, Dr Flemmer says.

“We expect to have the picker robot running in a couple of months.

“It will be able to follow instruction as to which part of the orchard to pick and will also store data - adding a whole new dimension to the traceability trend we are seeing.

“We also hope to use that robot for pollinating in the future, ensuring the robot is fully occupied in the different picking and pollinating seasons, and of course in different hemispheres as demand grows.”

The kiwifruit packer is adaptable to pack almost any type of fruit or vegetables, Dr Flemmer says, and will be operated by about 1.5 staff

News from Around the World
continued

each shift.

He believes that a return to the “No 8 wire” attitude in building tools to suit the environment may enable New Zealand to better compete and perhaps stem the flow of manufacturing plants heading offshore.

“Automation can substantially reduce labour costs to the point where New Zealand manufacturers can outperform Chinese manufacturers in terms of quality and cost and beat them at their own game,” he says.

“However, bringing in automation consultants or buying off-the-shelf machines are at best stop-gap measures - everyone can benefit from the advantages offered by systems freely available.

“The solution is to develop in-house capability to build intelligent machines with highly sophisticated vision systems working in conjunction with robots that can perform complex tasks very accurately and reliably.

“By increasing the technical level of a company, it will just keep winning.”
Source: Manawatu Standard

Pipfruit NZ calls for coordination or regulation

A repeat of the price-crash of apples can be avoided through better grower-marketer cooperation, says Ian Palmer of Pipfruit NZ.

Ian Palmer, the chairman of representative organisation Pipfruit New Zealand, has called for an improvement in the coordination between growers and marketers, in a bid to avoid a repeat of the price collapse that has plagued Braeburn apples in the country this season.

Mr Palmer, speaking to Radio New Zealand, explained that growers have shipped too many over-sized Braeburns to Europe, despite the knowledge that large apples are unpopular in the European market.

And he has not ruled out the possibility of returning to a system involving regulated control on exports.

He said: “I’m just starting to wonder whether we need to actually regulate to protect ourselves from ourselves. We have to get more cooperation happening within the industry, and in the end if we require some regulation to do that, then that’s what we need to seek.”



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