

A large group of people, mostly men, are seated in rows of white plastic chairs in a large, open warehouse or exhibition hall. They are looking towards the left side of the frame, presumably towards a speaker or presentation. The people are dressed in casual to business-casual attire, including jackets, sweaters, and collared shirts. Many have yellow name tags pinned to their clothing. In the background, there are various signs and displays, including one that says "SPECIALIZED EQUIPMENT FOR THE PRODUCTION OF AVOCADOS" and another with a logo that looks like "Sunfresh". The ceiling is high with exposed wooden trusses and industrial lighting.

# Talking Avocados

**On the Road to Achieve  
Consumer Acceptability**

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**Sunfresh Thailand  
Export Promotion Report**

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**Avocado R&D Road Show 2007**

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**Winter 2007**

Print Post Approved - 44307/0006

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# Avocados Australia Limited

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**We all make mistakes:** If we make a mistake please let us know so a correction may be made in the next issue.

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# Chairman's Perspective

## The year ahead

Three major extension projects being undertaken by Avocados Australia in 2007 are now in full swing. Feedback is already showing significant involvement by growers and very positive feedback about relevance, content and presentations.



At the time of writing, there have been two 'R&D Road Shows', held in Hampton near Toowoomba, and in Duranbah. Both these sessions were very well attended, with well over 150 people across both locations. I would like to thank the Boardman and Anderson families for being such generous hosts, welcoming us to their farms and sheds. The presenting team is looking forward to further sessions across Australia in the coming months. The Road Shows include R&D outcomes, advances in technology relating to our industry, national and local issues, and environmental issues. If you would like more information about a Road Show coming to a venue near you, check out page 44 of this issue.

In addition to the R&D Road Shows, the following initiatives have begun and will continue throughout the year, with some continuing in 2008:

- Canopy management field days run by Dr John Leonardi
- Spray technology workshops with Dr Henry Drew
- Regional Study Groups led by Simon Newitt (Qld Department of Primary Industry)

All these sessions will include information of benefit to growers and I encourage you to attend and support these field days. A full timetable of these events is included in this issue of Talking Avocados.

## Smart marketing

You may recall that in the September issue of Talking Avocados, I wrote about Avocados Australia's policy to encourage rationalisation of marketing entities, in an endeavour to provide the buyers/ consumers with the top quality long supply line that they are seeking.

The following statistics strongly suggest that a more proactive and innovative approach to marketing is going to be essential for the industry to survive and remain viable in the long term.

## Australian production

In 1999, Australian production was 24,000 tons

In 2007, Australian production will be approximately 42,000 tons

This massive increase has occurred despite significant climatic challenges.

There are currently 1.5 million avocado trees planted in Australia. Of these, 39% are under 6 years old, and half of that 39% are less than 3 years old. These trees are already producing, but are nowhere near their full production capacity. Obviously, the production from these younger trees will make a huge impact on the level Australian production.

## Imports

Currently New Zealand is the only country that has entry into the Australian market. The current volume is more than 18,000 tons this year. This figure will inevitably increase as the New Zealand industry grows.

With free trade agreements being discussed for several countries within the Federal Government framework, it is very likely that some of these countries will be looking to Australia as a high value market.

What impact will this information and these statistics have on the Australian industry?

**The need for the Australian industry to get together to undertake smart marketing becomes more apparent every day. There may be some pain or some loss of personal identity, but unless marketing entities join ranks and proactively explore opportunities, they will struggle under the reality of future challenges.**

*Henry Kwaczynski*

Henry Kwaczynski  
Chairman, Avocados Australia



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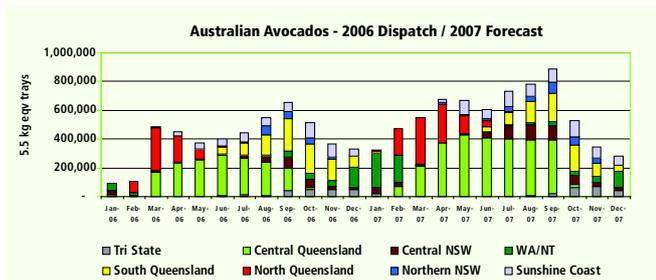
# Industry Matters

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

## Avocado Supply Challenges Demand

Australian avocado production has increased in 2006 to 2007 by over 20%. This has been the result of two main factors, production from new plantings coming on line and higher than normal fruit set across numerous regions. The last time the industry had an increase and fruit set of similar proportion was in the 2000-2001 crop year.

This increase in production was forecast and all contributors to the Infocado System had the forecast from January 2007 that this season's fruit was predicted to be as outlined in the graph below.



January 2007 Infocado Forecast

The other bigger issue with our season's crop flow was high retail prices during March, April and May, which did not truly reflect the wholesale price. A large amount of the crop built up in coolrooms while consumers paid higher retail prices. This back log continues in the system to this day.

### What has the industry done to help the situation?

We had planned to ensure that the levy rate changed as at 1 April 2007 and our system through HAL means that the new expanded promotion program was launched on 1 July 2007. This was the earliest we could get the change in place. The industry generic promotion program continues to grow consumption at a rate that other industries seek to emulate, but a promotion program that does not control retail prices cannot directly manage a 20% increase in supply in one year.

We all rely on the marketers and the retailers to work with the industry to ensure consumers receive market driven retail prices.

### I have heard that promotion levies have been used on other activities?

Marketing/promotion program levies have not been used on any other activities other than directly on marketing and promotion. Since the 2006-2007 year and continuing on into the future and in line with the move to the new levy rate, the avocado program is using R&D dollars for all work in areas that we are able to. No marketing levy dollars are going into any other activity.

We are maximizing the R&D levy opportunity where we are able to. This was one of the clear reasons for the mix of R&D levy versus the Marketing levy in the change that was put to all growers when changing the levy. Actually for the first time since 1998 in 2006-2007 all marketing levies are being completely being spent on promotion activities.

**We cannot use R&D on any type of promotion, or on regular assessment of the promotion program.**

The Promotion program budget for avocados was of for the following years:

- 05/06: \$561,798
- 06/07: \$759,929
- 07/08: \$1,456,740 (This amount only applies from 1 July 07)

The program is working hard to build consumption and will continue to do so into the future.

## Avocado Promotions Kick Off

The first stage of the 2007-2008 financial year promotion campaign is about to kick off. A range of magazines, word of mouth, TV and online form this stage of the avocado 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 Avocado supported always by specific recipe usage.

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

TV will target two 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. The online campaign will follow on from a very successful 2006 program and run in concert to the TV campaign on NineMSN, Yahoo7 and Coles Online.

Word of mouth (WoM) will form a new approach in providing essential information 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.

MEDIA/SHIFT	Media Plan: June 07 to October 07																								
	JUNE					JULY					AUGUST					SEPTEMBER					OCTOBER				
WOMAN'S DAY																									
WHO WEEKLY																									
NEW WOMAN																									
DELICIOUS																									
GOOD TASTE																									
HEALTH & WELLNESS																									
TELEVISION																									

Industry Matters  
continued

**Avocado Canopy Management Field Days 2007**

Canopy management continues to be one of the most challenging on-farm issues for avocado growers. Once avocado trees grow past the easy to manage phase profitable production systems can be difficult to manage.

Avocados Australia is running a number of canopy management field days as a component of the extension activities of project AV04008, the national canopy management project.

These field days will give growers an opportunity to observe a range of canopy management strategies and identify systems that may be suitable for their own production situations.

To learn more about the Avocado Canopy Management Field Days or register please visit the Avocados Australia website [www.avocado.org.au](http://www.avocado.org.au) and look under the *Events* section.



FIELD DAY REGIONS AND DATES ARE:

Field Day Regions		Dates
RENMARK REGION	Wednesday	9 May 2007
MILDURA REGION	Saturday	12 May 2007
PEMBERTON REGION	Wednesday	16 May 2007
ATHERTON REGION (Walkamin/Tolga)	Thursday	24 May 2007
SUNSHINE COAST (Beerwah)	Tuesday	17 July 2007
BUNDABERG REGION	Thursday	19 July 2007
ALSTONVILLE REGION	Friday	17 August 2007
MID NORTH COAST (Stuarts Point)	Tuesday	21 August 2007
GOSFORD REGION (Peats Ridge)	Thursday	23 August 2007
SOUTHERN QLD (Hampton)	Thursday	25 October 2007
PERTH REGION (Carabooda)	Thursday	6 December 2007

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### Industry Matters continued

#### **Taxpayers Must Prepare to Bear Future Farming Costs: McGauran**

Federal Agriculture Minister Peter McGauran says taxpayers must be prepared to fund the huge costs to keep farming going in the Murray-Darling Basin if irrigation water runs out.

The Government is planning more drought assistance after receiving a report warning there will be no water for crops and livestock, unless the catchment gets heavy rain in the next eight weeks.

Mr McGauran says Australians must provide more money if irrigated agriculture is to survive in its present form. "Our biggest challenge is making any extra support above what we haven't placed now, equitable, so that it doesn't discriminate against one commodity or one sector of agriculture against another," he said. "Secondly, that it's targeted, that it actually achieves the objectives that we want. It's no easy thing and it will be hugely expensive."

The Murray-Darling Basin Commission says the water situation is grim, but has not dashed all hopes for agriculture. The commission's latest drought update report says there should be enough water for basic livestock requirements.

Chief executive Wendy Craik says there is little hope of filling dams, but she is holding out some hope to irrigators. "There's probably about a 60 per cent chance that there would be a robust water market by September, that say Victorian irrigators would have about 50 per cent water, in New South Wales about 97 per cent high security and general security about 15 per cent to 20 per cent," she said. "Based on historical records, there is a reasonable chance that might happen but it's all going to depend on how much rain we get."

Long range weather forecasters are not offering much hope for the prospect of enough rain to replenish water storages in the next few months. Source: ABC

#### **Standard Contract for Code: now available**

From 14 May, a trader and a grower will only be able to trade in horticultural produce with each other if they have entered into a horticultural produce agreement.

Avocados Australia is making a standard contract ('horticultural produce agreement') available for growers and traders to use as a guide to their negotiations under the Mandatory Horticulture Code of Conduct. This document represents the basic option under the Code and can have other options and conditions added.

The document provided is the minimum required under the Code. It is recommended that growers read the document carefully and adapt it for their own requirements in negotiations with their trader.

The agreement will stipulate whether the trader will act as an agent or a merchant. It also sets out in writing how produce will be traded, payment and reporting timeframes.

In addition, an example of the traders' terms of trade and an

explanatory brochure are also available on the Avocados Australia web site at [www.avocado.org.au](http://www.avocado.org.au). The documents have been prepared in conjunction with Horticulture Australia Council (HAC).

Traders will be required to publish their terms of trade listing payment terms and delivery and quality requirements.

The terms of trade will also stipulate what commission, fees or other charges are payable by the grower where the trader is acting as an agent. Growers who are confident about the quality of their produce and the reliability of their supply should see their product as an asset in negotiating terms under the Code.

Good traders will recognise this and will start promoting the favourable terms of their business to growers.

#### **No water left for Murray Darling Irrigators**

Unless we get very substantial heavy rain before the middle of next month all irrigation in the Murray Darling Basin will have to stop.

That's the assessment contained in a report which has been delivered to the Prime Minister and the state governments this week. The Prime Minister commissioned the Contingency Planning Report on the Availability of Water in the Murray Darling Basin after the first emergency water summit he held with the Premiers last year.

Mr Howard says the findings on available water from November last year to July this year amount to an unprecedented dangerous situation. He's confident from the report that there will be enough water left in the system to provide for the essential needs of urban centres including Adelaide until the end of the year. And it will be possible for some farmers, particularly those who adjoin rivers to draw on those rivers for their own personal needs, but not for stock needs.

Mr Howard says he expects state governments and irrigation companies to stop all water allocations, including providing carry-over water to farmers. Source: ABC

#### **Australian-Mexican Joint Expert Group**

The first meeting of the Australian-Mexican Joint Expert Group (JEG) was held in Adelaide on 17-18 April 2007. Australia and Mexico agreed to form a JEG in March 2006 to enhance bilateral commercial relations between our two nations. The decision to establish the JEG reflects the increasing importance of the bilateral economic relationship to both countries, and our shared desire to enhance it.

The JEG will study all available ways and means of strengthening bilateral economic, trade and investment relations between Australia and Mexico. The Australian and Mexican JEG delegations include government officials and private sector representatives. The private sector will be consulted throughout the JEG process.

The discussions will form the basis of a joint paper to be presented to the Australian and Mexican Ministers for Trade later this year for their consideration.

*Industry Matters*  
*continued*

The Australia-Mexico bilateral economic and trade relationship is in very good shape. Mexico was Australia's largest merchandise trading partner in Latin America in 2006 with two-way trade worth \$1.9 billion. Australia's exports to Mexico were valued at \$846 million, dominated by coal. Meat, leather, live animals, dairy and a growing range of services are also exported. The trade in Australian education and training services has been especially strong. Australian food and wine brands are increasingly on sale in Mexico.

Imports from Mexico were valued at \$1.05 billion and have increased significantly over the past decade. The major imports from Mexico were manufactures, particularly internal combustion piston engines, motor vehicle parts, telecommunications equipment and computers. On 10 April 2007, the Mexican giant Cemex, the world's third largest cement producer, increased its offer for Australia's Rinker Group Ltd to US\$14.2 billion, winning management support for the largest takeover in the history of the global building-materials industry.

Mexico is one of the world's most important developing countries and a key economy in Latin America. Its size and geographical proximity to the world's largest economy and North American Free Trade Agreement (NAFTA) partner, the United States, and very good links to markets in Central and South America, make it an attractive trading partner for Australia. Given complementary economic and trade profiles, there are strong prospects for expanding Australia-Mexico trade and

investment. Closer economic relations could provide a foundation for Australia and Mexico to become major political and economic partners in the Asia-Pacific region and the Americas.

Australia will be represented by officials from the Department of Foreign Affairs and Trade; the Department of Agriculture, Fisheries and Forestry; and the Department of Industry, Tourism and Resources.

**Free Succession Planning Seminars**

Free seminars addressing the vital 'how to' strategies of business succession planning are now available to owners and advisers of small businesses across Australia. In a project organised by Ernst & Young Australia, and funded under the Australian Government's Building Entrepreneurship in Small Business Program, free seminars will be held nationwide between August and October this year.

The Small Business Succession Planning seminars will raise awareness of the main components of a good succession plan, helping business owners prepare for this critical time in the life cycle of their enterprise. Specifically, the seminars will help business owners to: diagnose their current readiness for business exit, and increase their awareness of the need to set purposeful goals; develop business succession strategies; and effectively plan for their eventual retirement from business. The program is also open to business advisers, through a separate seminar stream.



# Avocado Growers

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### Industry Matters continued

Small business owners and business advisers are invited to register for their nearest event by visiting the Small Business Succession Planning website at [www.sbsp.com.au](http://www.sbsp.com.au). The website also includes a succession planning self-assessment tool and an online seminar option. Business owners and advisers can also order, free of charge, a succession planning guide on CD Rom.

#### Seminar outline

- Evaluating your position
- Setting your goals: personal; financial; business
- Planning your succession strategy
- Choosing the next leader
- Addressing the key people to the business
- Finance and working capital
- Systems and processes
- Structure documents for your business' continuity
- Methodologies of ownership exit
- Business valuation
- Locating investors and marketing the business
- Taxation consequences of ownership exit
- Superannuation and retirement
- Risk management
- Time frames
- Documentation of a succession plan
- Project management
- Stakeholder identification, communication and management

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## VI World Avocado Congress in Chile - 2007

The International Avocado Society has designated Chile, one of the leading countries in the avocado industry, as the host for the VI World Avocado Congress that will be held in Vina del Mar city, from November 12 until 16, 2007.

On behalf of the Local Organizing Committee we would like to invite you to visit the VI World Avocado Congress 2007 Web site, where you could find further information about the Congress activities and general information about Chile.

[www.worldavocadocongress.com](http://www.worldavocadocongress.com)

The scientific program of the VI World Avocado Congress will include the latest information on avocado production and management issues, with special emphasis on the future of the Industry. The program also includes avocado marketing presentations and panel discussions about promotional and trade topics from all over the world.

The Congress's Program includes General Sessions and a Pre-Congress Field Trip. The Congress's official languages are English and Spanish, simultaneous translation will be available in these languages.

#### Congress Sessions include:

1. Genetic resources (Propagation, Rootstocks, Varieties, Biotechnology);
2. Pests and diseases;
3. Culture management (Mineral Nutrition, Irrigation, Ecophysiology, Flowering and fruit development and Management;
4. Post-harvest and processing and
5. Marketing

## 2007 Avocado tour to Chile

### including the World Avocado Congress at Vina del Mar

Examine avocado production techniques and distribution systems in Chile before attending the World Avocado Congress. Enjoying the fascinating history and culture of Santiago and surrounding areas. Tour the scenic Maipo River Valley and local vineyards.

For a more detailed tour itinerary and booking information please go to [www.quadrantaustralia.com](http://www.quadrantaustralia.com) or phone Quadrant Australia on 1300 722 420. Fully Escorted Tour Reference: AX01208

## Avocados target foodservice at 'Restaurant 07'

Sunfresh and Simpson Farms have paid and are working with Avocados Australia and HAL to make the Australian Avocados stand at 'restaurant 07' on 13/14 August in Sydney a commercial success.

Sunfresh, Simpson Farms, Avocados Australia and HAL in partnership are putting together an exciting Australian Avocados themed food service trade stand. This is a great opportunity for targeting restaurateurs who attend 'restaurant 07', Australia's only trade event specifically geared

*Industry Matters*  
*continued*

to the needs of the restaurant industry.

'restaurant 07' will showcase the very best in regional and seasonal produce, ingredients, and premium food products to visitors. Innovative new products and services to help restaurants grow their business and achieve greater profitability will also be on display.

Over 3,300 qualified industry professionals from a wide range of independent restaurants, restaurant chains, hotel and bar restaurants, member's club restaurants and contract caterers attended the very first 'restaurant 06'. Organisers expect a significant increase in attendance at this year's event, to be held on 13-14 August 2007 at the Royal Hall of Industries, Moore Park, Sydney.

An exhibitor in 2006, Helen and Robert Dyball of Snails Bon Appetite, sees 'restaurant 07' as "the highlight of our 2007 marketing plan".

Another 2006 exhibitor, Gina Di Brita, Managing Director of Numero Uno Coffee, said: "We got more business out of the two days at 'restaurant 06' than any other trade show we have ever been involved with. We can't wait for 'restaurant 07'."

More information at [www.restaurant07.com.au](http://www.restaurant07.com.au)

**Wine Industry uncorks a New Strategy**

The Australian wine industry has announced it's re-inventing itself in a bid to sell an extra \$4 billion worth of wine over the next five years.

The marketing and re-branding announcement was made jointly by the Winemakers Federation of Australia and the Australian Wine and Brandy Corporation in Sydney. A 17-member taskforce, headed by the deputy chairman of McWilliams Wines, Kevin McLintock, has spent 18 months developing a blueprint to tackle global competition, research and development, climate change, water allocations and industry restructuring to boost sales.

As part of the Wine Australia: Directions to 2025 strategy, Australian premium wines will be promoted in four sub-brands. Mr McLintock says the gains will come through a combination of niche marketing, a focus on regional and fine wines and a focus on business sustainability at the individual winery level.

But the new plan will involve restructuring for wineries themselves and their peak industry bodies. Chief executive of the Winemakers Federation of Australia, Stephen Strachan, also admits some of those who are concentrating on the bulk end of the wine market will not fit comfortably in the new re-branded environment. Source: ABC

**Avocado R&D Road Show 2007: Register Now**

Avocados Australia has launched the four yearly regional Research and Development Road Shows 2007 at Sunnyspot Packhouse in Ravensbourne west of Brisbane, quickly followed at Anderson's Nursery in Duranbah in far northern NSW.

The R&D Road Show 2007 programs will look at research developments

and horticultural techniques directly applicable to avocado grower. All R&D Road Shows will be held on orchard allowing you to walk through the orchard with some of the worlds best avocado researchers. The Program is now available on at the *Events* section of the industry website [www.avocado.org.au](http://www.avocado.org.au)

The program involves researchers working on current avocado levy funded projects as well as the industry leadership and the ACCC discussing the Horticulture Code. The presenters will include: Dr Tony Whiley, Mr Ken Pegg, Dr John Leonardi, Dr Fiona Giblin, Ms Joanna Embry, Mr Henry Kwaczynski and Mr Antony Allen as well as others.

Each day's schedule includes presentations, lunch, networking time, a panel discussion period with the attendees where all presenters will participate, along with a farm/orchard/packing shed session which will include the presenters.

Road Show Region		Date
South Queensland	Tuesday	10 July 2007
North New South Wales	Thursday	12 July 2007
Tristate	Thursday	30 August 2007
Western Australia	Thursday	4 September 2007
Central New South Wales	Tuesday	25 September 2007
Central Queensland	Tuesday	2 October 2007
North Queensland	Thursday	4 October 2007

More details on page 44. Registrations are now available at the Events section of the industry website [www.avocado.org.au](http://www.avocado.org.au)

**Registrations form in this edition of Talking Avocados.**

**More Weeds added to Herbicide Resistance List**

Four weeds have recently been added to an ever-growing list of

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### Industry Matters continued

glyphosate resistant plants, particularly in northern New South Wales.

The discovery that wild oats, sow-thistle, flaxleaf fleabane and liverseed grass are all at risk of developing resistance to the herbicide.

Technical weed specialist Andrew Storrie says farmers need to use herbicides carefully. "Basically when you're going to get it is reduced tillage situations, anybody with an orchard that uses a lot of glyphosate between rows, under the trees, all that sort of things, fenclines, irrigation channels," he said. "Basically where you're relying on glyphosate to control the weeds, if you're not on the ball, you'll select out resistant individuals.

"Even though it's very low numbers, you'll get one or two that'll survive, and they'll set seed. So stop the ute, get out and pull them out [and] chip them with a hoe." Source: ABC

### City Buyers Look to Rural Properties

Rural property listings are on the rise and cashed-up city syndicates are looking to buy. Dryland, broadacre and mixed cropping properties that looked bad before the rains are now finding their way onto the books of real estate agents across the country.

Some agents estimate a 15 per cent increase on the same period last year. Elders Real Estate manager for Victoria and the Riverina Shane McIntyre says neighbour-to-neighbour sales have been strong, but the

biggest trend is coming from city buyers who want water on tap.

"The general marketplace probably has an unprecedented amount of cash in it and that is largely due to share market dividends and general commercial activity that has been generated out of Sydney and Melbourne in particular," he said. "There is a renewed interest I'm pleased to say from the city investor for rural property, they want to now make rural property part of their portfolio." Source: ABC

### Asia Fruit Logistica:

**5-7 Sept 2007, Bangkok Thailand – International Trade Fair for Fruit and Vegetable Marketing in Asia**

Asia Fruit Logistica, which takes place in Bangkok, Thailand, on 5-7 September 2007, will host fresh fruit and vegetable companies and organisations from some 22 different countries all over the world, including many from Asia itself

"There is a very strong focus on the region of Asia," said Gérald Lamusse, managing director of Asia Fruit Logistica. "Companies and organisations from China, Indonesia, Philippines, South Korea and Sri Lanka are going to exhibit and we are delighted to announce national pavilions from Taiwan and Thailand.

In addition, Asia Fruit Logistica has attracted exhibiting companies and organisations from leading supplying countries outside Asia.

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## Industry Matters continued

Australia, South Africa, Argentina and France will be exhibiting under their own national pavilions, while major fresh produce exporters from the USA, New Zealand, Italy, Spain, Greece, Belgium, the Netherlands, Germany and the UK are also going to be at the trade fair [www.asiafruitlogistica.com](http://www.asiafruitlogistica.com)

### Agriculture and Mining combine to resolve Skills Shortage

The agriculture and resources sectors will sign up to a joint effort to address the skills crisis.

Under the agreement, efforts will be focused on expanding the labour pool, rather than just competing for skilled workers. In the past, mining companies have often been blamed for worsening labour shortages, by luring workers away with high wages. The Minerals Council says the resources sector will need another 70-thousand workers by 2015, and it's pledged co-operation to find and train more workers. Source: ABC

### SpongeBob Sells Spinach and Dora the Explorer Hawks Carrots

SpongeBob sells spinach and Dora the Explorer hawks carrots as food producers and entertainment companies join forces

A whole crew of new and old children's characters is getting into the green and healthy business, with companies licensing their images to sell everything from baby carrots, clementines and grapes to organic cereal and pastas designed specifically for children.

Nickelodeon's SpongeBob Square-Pants currently adorns bags of spinach, organic frozen edamame and more recently white and yellow plums. His fellow Nickelodeon cartoon character, Dora the Explorer is hawking pears, apples and baby carrots. And the letter of the day is "O" for organic for "Sesame Street's" Elmo, Cookie Monster and Big Bird, whose toothless smiles grace boxes of organic alphabet pasta, cereal, crackers and cookies.

Though it's a fraction of the \$45-billion entertainment licensing industry, the use of characters from well-known children's programs to sell organic, natural or healthy food products is a growing niche populated by major companies including Disney and smaller corporations such as the Melville-based Hain Celestial Group, which has been in the natural and organic industry for more than a decade. Many of the companies that own these characters will be at the Licensing International Expo 2007, scheduled to run Tuesday through Thursday at the Jacob K. Javits Convention Center in Manhattan.

"In the past, it was easy for a licensor to attach his character to a snack food and high sugar content food because kids normally go for that kind of stuff," said Charles M. Riotto, president of the International Licensing Industry Merchandisers' Association. But now, he said, licensors are "feeling more of a responsibility to promote good values and good health, so I think we're going to see a lot more of these strategies that say that the licensor is concerned with the well being of fans and consumers."

Those in the industry of licensing children's characters note that

addressing the growing problem of childhood obesity and being overweight has become a national priority. Health professionals have been demanding more responsibility from marketers who advertise food and beverages to children. And, at the same time, the market for organic and natural foods and products has expanded to satisfy an increasing consumer base. Source: Newsday Inc

### Australia: avocado market feeling the heat

The avocado market is feeling the pressure of a bumper season and peak production of the winter months, as the bulk of the 2007 crop now comes off the trees. For Childers, Qld, district growers Tom and Donna Duncan, the market price drop has been even greater than expected, due to the number of growers producing bumper yields and quality, like themselves.

"We had perfect humidity during flowering last spring, and the dry weather over the summer was perfect for growing the fruit, provided you have water," Mr Duncan said. "When everyone is in the same boat the market can't hold up." He said that when the season began in April, prices were about \$20/tray, but had now dipped back to \$10-\$12/tray, which left little profit margin for smaller producers.

"The Queensland crop this year is massive with the drought, but already growers are worried about the season ahead," he said. "Watering has been constant, and people are concerned about how long we'll be able to keep it up during the spring." Farming on the outskirts of town - with 38 houses as neighbours to the property - the Duncans grow 1000 trees and expect to pack 10,000 trays before harvest finishes in July.

## WARNING

Avocados Australia has for a number of years paid a large amount of money for the industry's right to use the Heart Foundation "Heart Tick" on avocados.

**If you are using a "Heart Tick" logo from anyone other than the label companies "Label Press" or "Compass Labels" you are acting illegally.** No other label printers are able to legally print the "Heart Tick" for use on avocados.

Avocados Australia is undertaking a clean up of the "Heart Tick" printing. We will lose access to the "Heart Tick" logo if it is used illegally.

Avocados Australia, AUF and the Heart Foundation will enforce their Registered Trademark rights to the fullest extent.

If you have non-genuine labels do not use them. If you know of label companies offering to print non-genuine "Heart Tick" labels for you please let us know on **1300 303 971**, so we can all help keep this valuable tool.

**All growers could lose access to the "Heart Tick" logo if you don't act now.**



CERT TM

## Industry Matters continued

They will sell all through fruit through a grower co-operative marketing group, AMCAL. Mr Duncan said the marketing group had become critical for their business, particularly with increased pressure from Managed Investment Schemes (MIS) buying farms in the industry. "One of the MIS here in the Childers region is expected to 2.6 million trays this year - so without the marketing group we can't compete," he said.

"The worry is that the market is already full, without new avenues opening up, and the MIS are continuing to plant more trees. "And then if the market collapses, the long term growers are going to get sucked down the plug hole as well." Source: Queensland Country Life

### Corner store retailers squeezed by supermarkets

BIS Shrapnel has released findings from its study of the route trade sector in Australia – a study which shows that service stations with convenience stores, chain convenience stores and independent convenience stores/milk bars/delis are the strongest performing channel.

Qualitative interviews with route trade outlets indicate consumers patronise each channel of route trade for different reasons.

Service stations with convenience stores which attract customers due to their long opening hours, quick service, short queues and good locations, are expected to continue to grow in numbers, according to



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Logos: Brisbane Produce Market, Fresh Tastes, Market Fresh, Brisbane Produce Market, Brisbane Produce Market.

the report.

The key to the success of independent convenience stores/milk bar/deli/corner stores lay in their customer service and the personal relationship between owner and customer, BIS Shrapnel said.

Given the independence of non-chain corner stores, they were better able to tailor their product range to suit the neighbourhood.

BIS Shrapnel has however forecast growth of only 0.4% in turnover during the next two years as the route trade sector struggles to develop in competition with supermarkets and foodservice outlets. Source: BIS Shrapnel



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Industry Matters  
continued

**NZ Avocado growers urged to invest in Australia**

New Zealand avocado growers who last year earned \$43 million from exports to Australia are being asked to pay a new levy of 20c a tray on fruit crossing the Tasman. “The reality is that we don’t have a choice about this,” Avocado Growers’ Association chairman Hugh Moore said yesterday. If we want to protect and grow our Australian market, we must invest in it,” he said. “And we either do it ourselves or we’ll have it ‘done’ to us.”

New Zealand is the only nation sending avocados to Australian markets, but Mr Moore warned orchardists the good times would not last without a significant investment made in marketing.

His association wants the levy money to be tagged for consumer promotion in Australia.

The association said the Australian grower organisation, Avocados Australia was already seeking a 28c a tray levy from New Zealand growers – equivalent to \$700,000 for the 2007/2008 season – but had not been able to give assurances it would protect the interests of NZ growers.

Mr Moore said Avocados Australia saw New Zealander growers as “free-loaders. They want us to help pay for promoting avocados to consumers and they’ve been pretty aggressive in their approach,” he said.

“What’s more, they’ve got some government support and other

countries banging on their door to get a slice of the pie. We were never going to hand over \$700,000 of growers’ money without having some say into how it’s spent, or having some accountability in place,” Mr Moore said.

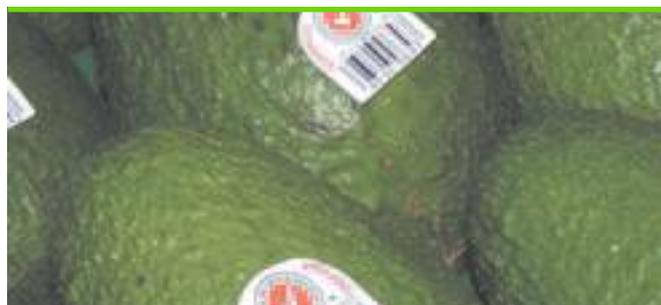
“We certainly understand the value of promotion and have signalled to our growers for some time an investment needed to be made.”

Mr Moore said the association had a sound commercial proposal for getting the best return for growers over the long term, and particularly during seasons when big crops were predicted – such as this year.

“We need to get values up and keep them up,” he said. “Growing such a significant market comes at a cost, and that now is the time to be making that investment”.

The proposal is being discussed with New Zealand avocado growers at a series of road shows during June. A decision on the proposal will be made in July.

Source: NZ Fairfax Media






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# Australian Roundup

## Sunshine Coast Report

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

Sunshine Coast growers are busy picking, but after initially good returns, the reality of high volume of fruit from other regions has eroded early benefits.

I believe that this challenge is likely to continue for the rest of this year.

Three events have taken place in this area in the last few months – the Avocados Australia R&D Road Show 2007, the canopy management workshop and the regional study group. All these have been well attended and it is encouraging to see such active participation. There will be another meeting of the regional study group in September.

The Maroochy Council has undertaken an initiative to raise awareness of its hinterland as an area producing and processing many agricultural products. A couple of booklets have been produced and are available from the Council. One of the aims of this project is to encourage local food service providers and restaurants to source local products and strongly promote their use. This is a great initiative and may be a good benchmark for other areas. If you would like further information, you can call me or Maroochy Council.



## Western Australia Report

By Jennie Franceschi Avocados Australia Director for the Western Australia Growing Area

Time seems to be flying by here in the West and I expect everywhere else. While it only seems like we have just finished our season in reality it's been over for a few months.

In general, even though many South West growers lost some fruit to the frost and size was down, we still had a pretty reasonable season. The frost does seem to have made an impact on fruit set for the following crop though. Those growers affected, just did not get the flower they were all hoping for. While we are down on crop it still isn't as bad as the season a couple of years ago when the very cool spring also affected flowering & fruit set.

The spray workshop was very well attended in the South West and although they didn't have as good attendance in Perth, everyone who did attend found them very valuable. I have had a lot of great feedback on these workshops, so I am sending a big thank you to Henry Drew on behalf of all attendees, they all appreciated the effort you put into these workshops.

We also had the canopy management workshops, which were also a great success. There was a great turn out in the South West with a wide range to techniques shown and discussed. Growers found this very informative and once again all the feedback was very positive. So thanks to John Leonardi for organizing and running such great workshops. I know the growers who have attended these workshops are very appreciative of these opportunities.

Our new Industry Development Officer has been appointed, so I would like to welcome Jonathon Cutting, our new IDO. We are all excited about the prospect of helping and working with Jonathon to develop and strengthen the industry here in Western Australia. I think Western Australia is very lucky to have a person of Jonathon's caliber here in Western Australia to help guide us all in the right direction.

We had a good turn out at our AGAWA AGM with Alan Blight returned



to the Chair. Alan has done a great job over the years and we are all grateful he has decided to stay in this position.

Perth is just beginning to gear up for their coming season, so I am sure they are all hoping the market will strengthen a bit before they get into the swing of it. We are getting quite a bit of rain here in the South West and everyone has their fingers crossed hoping that we do not see a repeat of last year's frosts. In general trees are looking good, fruit size looks to be a lot bigger than last year and if all goes well we should get a pretty reasonable flower and hopefully fruit set for the following year.

I hope things are looking good for all other regions

## North New South Wales Report

By Peter Molenaar, Avocados Australia Director for the Northern New South Wales Growing Area

Growers have been kept busy over the last two months attending a Study Group and the Avocado R&D Road Show 2007. The Study Group under the direction of Simon Newett was very well received. The topic discussed was Irrigation. It was a good chance to see the latest in soil monitoring equipment and also to polish up on.



## Central Queensland Report

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

The weather so far in July has been very cool and dry with frosts about, quite the opposite of June which was warm and quite wet with some good falls of steady soaking rain but unfortunately no runoff. This has been quite disappointing with the announced allocations being very low this year. Surface Water on the south side of the Burnett River has 3% allocation while north side has 28%. This is a huge drop down from last year which was for both 46% and the previous year 100% allocation. Ground Water has fared much better with basically the same allocations being announced this year as had been announced last year.

It will be very interesting to see how much effect on yield these allocations have on next years crop but at the end of the day there is still water out there, water is transferable from north to south and visa versa. Also if we get some decent storms in the catchments which result in inflows into the dams there will be an increase in allocation.

At this point CQ is powering through a big crop of Hass with more fruit being harvested than was initially forecast. Looks like our harvest will end up going through until late September with maybe some late varieties going on later.

Don't forget the Avocado R&D Road Show 2007 is planned for Tuesday 2 October at the Reynolds farm on the Kolan River north of Bundaberg. It will be good to see everyone there.



## Central New South Wales Report

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

The harvest season is well underway with volumes as close to forecast as could be expected. Most



growers are continuing to pick at a steady rate despite the increased volumes at this time of year, mainly due to new plantings along the east coast.

The current situation is an important reminder for growers to refocus on their cost structures to ensure they remain competitive and viable. Market agents have indicated that some relief may occur in October but, it is possible values will be remaining lower due to a large New Zealand crop due to follow the current east coast harvest.

After a very favourable growing season, the past few weeks has seen high winds leading to some losses to the heavy crop, and frosts causing some concern for very young trees.

On the topic of levies it should be reassuring to growers that many in the industry successfully campaigned for an increase to the marketing levy. It will surely be put to good use to ensure as far as possible a viable future for the industry in the winter months despite the increase in fruit volumes forecast over the coming years.

Last month's growers' meeting was held at Tideman's property in Comboyne, where the cool mountain weather called for the winter woollies. After lunch a tour of the very scenic farm included areas of blueberries, established avocados and new plantings.

In closing I would like to remind growers to show their support for Avocados Australia by attending the R&D Road Show 2007 on 25 September at Tolson's in Stuarts Point.

### South Queensland Report

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

What is happening in South Queensland? Well we have been having nice cool weather, nice sunny days plenty of wind at times but still no rain. I think they call it climate change or is it just the normal weather pattern?

In mid June we have had some very cool weather in some areas causing severe frosting which has meant large losses of avocados. The survival of some avocado trees is also a concern and only time will tell what will happen to them.

We have had the Avocado Road Show 2007 at Sunnyspot and the Study Group meeting with Simon Newett at Bill and Kathy Kerecko's orchard. Both of these days have had great attendances with extremely good information provided by all who participated. Maybe some of the information is not what we all want to hear but at least it may prepare us all for potential changes within our industry in the future.

The market for avocados at the moment is a hard slog with large volumes coming in. The long term for pricing and supply will probably not change that much, with crop forecasts of both Australia and New Zealand for the rest of the year being higher than average.

I hope for everyone's sake in all regions that are suffering dry conditions that we see a change for the better very soon. The impact that these conditions are having on us all surely can't go on for much longer. In my next report I hope to only talk about rain and the amount that we have all had.

Good luck with the rest of the picking.

### Tri State Report

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

In early June Simon Newitt was in Renmark for



the Tri-State workshop. There were about 43 people in attendance and all had a very interesting and informative day. After a short time the questions and discussions started flowing. There were a few growers who came that are new growers. Growers came from a large distance, one couple were from Birnsdale (south east of Melbourne). As there will be only one per year held in this region the next one will be held in the Sunraisia area.

The weather is playing havoc with some areas this year again. Ironical that severe frosts hit during the same week that they hit last year. A lot of Hass were again frosted, but this year growers had significant fruit drop caused by frost in their Gwen and Reed as well. There has been some rain in the Murray Darling Basin but not enough not have significant run-off. We are all keeping our fingers crossed for heavy rain in the catchment area in the near future. At the time of writing this report we are on a 4% allocation enough for July irrigations.

A reminder to all growers in the Riverland that the Royal Adelaide Show is on again from September 7th – 15th. This the best way of you as growers promoting Avocados to the general public. If you haven't worked at the Show before contact Peter Fechner on 8541 2889 or [pfechner@riverland.net.au](mailto:pfechner@riverland.net.au) to volunteer for a day. You will find it fun and rewarding.

The Avocado R&D Road Show 2007 will be held in Red Cliffs on 30 August. See page 44 of Talking Avocados for registration forms and other details on format and speakers.

### North Queensland Report

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

The avocado season is well and truly over for the North Queensland growers, except for the last few from the elevated tablelands around Ravenshoe. These farms are at about 3000 ft elevation so are now getting the full blast of the cold dry winds that are coming from the south west. They have had morning temperatures at -7degrees with severe frosts and there have been frosts also at Atherton and Mutchilba-Dimbulah.

This cool dry weather is certainly a change from the hot wet of the past 3 months. So the seasons come and go, as does the crop cycle. The Shepard crop has started to flower in most areas and there is probably a small set of fruit on the early flowers from late May- early June. This blast of cold will hold the flowering up for a while and we do expect a late flowering and a main set in August when things warm up a bit. This is normal for the Mareeba area. The Atherton region will still have to wait for the August set and we will take our chances with the "mango showers " that come our way in August.

We have had a busy programme this season with visits from Dr John Leonardi to discuss canopy management, Simon Newett QDPI&F on control of Pc and a session on spray application for control of insect pests with Dr Henry Drew. Growers should take advantage of the information presented and the side discussions during the farm walks. The ACCC has taken the initiative to come to NQ to explain the Horticulture Code of Conduct and we will look forward to hearing the policeman's perspective on the subject.

There is still the Avocado R&D Road Show 2007 on 4 October at the Lavers Orchard to look forward to and all growers should plan for a day off farm to attend this session.



# Regional Avocado Study Group meetings underway

**Simon Newett and Peter Rigden**

*Extension Horticulturists, DPI&F, Nambour*

A new 3-year project, 'Study Groups to Achieve Globally Competitive Avocados', got underway in April this year. The project is designed to establish and support 10 regional study groups across Australia and bring growers and experts together to share, learn from each other, receive new information, observe and debate.

The growers in each region identify their main issues and from these decide on the topic of the next meeting. Project staff then design a workshop around the topic and where possible also invite along an expert on the chosen subject. The meetings also afford a valuable opportunity for growers and others involved in the avocado industry to meet and network over smoko or lunch.

Typically each meeting consists of a shed session on the chosen topic including, where appropriate, hands on activities such as a pest and disease clinic, examining soil moisture monitoring equipment or a quiz to reinforce the learning process and have a bit of fun. There is always a farm walk on the host property to generate lively discussion on the topic of the day and other issues.

Depending on the preferences of the group and the topics to be covered, meetings go for half a day or longer.

A feature of the meetings is that detailed, illustrated, minutes are prepared by the project's organisers and mailed out to attendees. These provide each participant with written information on the topic covered and any other issues that arise at the meeting so that everyone involved has a permanent record for future reference.

Since the initiation of the project in April 2007 until mid-July four study group workshops have been held as summarised in the following table:

Group	Date	Main Topic
Sunshine Coast	4/4/07	Preparing for harvest
NNSW and Gold Coast Hinterland	23/5/07	Avocado irrigation
Tristate	1/06/07	Avocado water needs, irrigating with limited water, and avocado nutrition
North Queensland	21/06/07	Integrated Phytophthora control

To date the meetings have been well attended averaging over thirty growers per meeting, and guest presenters have included Dr Roberto Marques (Qld DPI&F), Gary Creighton (NSW DPI), Lisa Martin (EE Muir & Sons) and Simon Newett (Qld DPI&F).

Other groups will be established in the near future and at least one meeting will be held in the following regions before the end of the year:

- West Moreton (Toowoomba Range/Gatton)
- Bundaberg/Childers
- Mid north coast NSW (Stuarts Pt/Comboyne/Woolgoolga/Coffs Harbour)
- Central Coast NSW (Gosford/Kulnura/Somersby)
- WA



Gary Creighton, NSW DPI, delivering a workshop on irrigation to the NNSW study group at Tom & Veronica Silver's farm, Alstonville

*Regional Avocado Study Group meetings underway – continued*



Tristate study group 'networking' over a BBQ lunch on Warwilla orchard near Renmark, South Australia managed by Ben Dring & Nigel Lloyd (AgriExchange)

**Notification of meetings**

For the first round of workshops invitations will be mailed to growers via the Avocados Australia 'Talking Avocados' mailing list a couple of weeks before the event. If you are a new grower, or don't receive 'Talking Avocados', or are not known to your local extension officer please contact the latter or Simon Newett to ensure you get on the mailing list and receive an invitation. The first invitation and set of minutes for each group meeting is mailed to everyone on the 'Talking Avocados' list but subsequently will only be sent to those who have attended or completed the contact details form mailed out with the first minutes.

For further information and to get on the invitation and mailing list

Contact: Simon Newett, Department of Primary Industries and Fisheries, Maroochy Research Station, Nambour, Queensland.  
Phone: 07-54 449619, fax 07-54 412235,  
or email [simon.newett@dpi.qld.gov.au](mailto:simon.newett@dpi.qld.gov.au).

**Acknowledgements**

This project is being made possible by support and funds from Avocados Australia Ltd and Horticulture Australia Ltd, and the support of officers



Sunshine Coast study group on a farm walk at Neil & Joss Donovan's orchard, Bellthorpe

from the Department of Primary Industries and Fisheries Queensland, New South Wales Department of Primary Industries, Department of Agriculture West Australia and EE Muir & Sons.

Project leader Simon Newett is assisted in organising the workshops by Peter Rigden (DPI&F) at Nambour, Danielle Le Lagadec (DPI&F) at Bundaberg, Matthew Weinert (DPI&F) at Mareeba, Phil Wilk (NSW DPI) at Alstonville, Greig Ireland (NSW DPI) at Coffs Harbour, Sandra Hardy (NSW DPI) at Gosford, Lisa Martin (EE Muir & Sons Pty Ltd) at Robinvale Victoria and Alec McCarthy (Dept of Ag WA).

We are all looking forward to your participation in the workshops!



Gary Creighton NSW DPI demonstrating water monitoring equipment to the NNSW study group at Tom & Veronica Silver's farm, Alstonville

# Board of Director 2007 Elections

## Avocados Australia Limited

The Avocados Australia Limited constitution includes the process of rotating Board Directors. One third of the Board must stand for election each year, currently this means three Directors must stand for election in 2007.

The nomination and election process will take place during the period 13 August to 20 September 2007 (see Figure 1 for the important dates). During this period members of Avocados Australia Limited will have the opportunity to nominate and vote for their "Growing Area's" representative on the Avocados Australia Limited Board.

There will be three "Growing Areas" electing Directors under the rotation requirement and they are:

1. North Queensland
2. Central Queensland
3. North New South Wales

Voting in the election is only open to members of Avocados Australia Limited. Any commercial avocado grower is entitled to apply to become a grower member of Avocados Australia Limited. If you have not already joined, please complete and return your membership form in this issue of Talking Avocados or visit our website [www.avocado.org.au](http://www.avocado.org.au) for more information and membership forms.

## Avocados Australia Limited ELECTION TIMELINE

**Nominations for Board Directors  
called 13/8/07**

**Board Directors Nominations  
close 30/8/07**

**Board Election Ballots  
mailed 6/9/07**

**Board Election Voting  
closed 20/9/07**

**New Avocados Australia Board  
announced at AGM 25/9/07**

**First Meeting of the New  
Avocados Australia Board 26/9/07**



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**DEALER AND SERVICE NETWORK THROUGHOUT AUSTRALIA**

# Annual Avocado Levy Payers Meeting

## MEETING NOTICE

Avocado Industry Advisory Committee and the Avocados Australia Board advise that the

### 2007 Annual Avocado Levy Payers Meeting

Will be held at:

**I & A Tolson's  
238 Fishermans Reach Road,  
Stuarts Point, NSW**

As part of the Avocado R&D Road Show 2007

**On Tuesday  
25 September 2007  
commencing at 4:15pm.**

### **Purpose of the meeting:**

For Levy payers to receive presentations from the Avocado Industry Advisory Committee and the Avocados Australia Board on the Industry Strategic Plan, the Annual Investment Plan and the IAC Annual Report (including reports from Horticulture Australia on the R&D and Marketing Programs).

# FOR SALE

## Avocado Farm closing down

Afron Diesel 6m Cherry Picker	\$14000 ono
Hydraulic chain saw (with Afron)	\$900 ono
Grading Machine (KW Engineering)	\$6500 ono
Hydraulic Forks for Tractor	\$2700 ono
Pallet Jack	\$700 ono
Coolroom	\$2000 ono
Rear Forks pto	\$1000 ono
20HP Centrifugal pump	\$6000 ono
Fert Spreader	\$500 ono
2.4m Alu picking ladder (as new)	\$300 ono
5 HP Grundfos submersible bore pump (as new)	\$2800 ono
15 KVA 3 phase generator	\$3500 ono
1000 lit Sylvan Airblast sprayer	\$900 ono
12 Picking wooden bins	\$600 ono
6 Picking bags	\$150 ono
Miscellaneous items	

Contact Merle McAvoy 07 5466 1964 or 0424 608 796



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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 Intech survey over 5 years to 30/9/06. Past performance is not indicative of future performance.

# Food Value Chains & the Concept of Lean

(Part 2)

By Joanna Embry

Avocados Australia

*Adapted with permission from materials published by Andrew Stewart, InteLog*

*Part 1 of this article was published in the Autumn edition of Talking Avocados. It explained and illustrated the concept of a "Value Chain" within the food industry and presented the 5 principles of "Lean Thinking" as an approach to deliver value to customers and eliminate waste within Value Chains. Part 2 will provide more detail on identifying waste within the supply chain and adding value to the customer to win market share and grow your business. Included also is an example of an Australian Food Business which has successfully implemented lean principles in its everyday operations with positive results.*

## Understanding Value and Waste

In order to go lean, you need to understand customers and what they value. To get your company focused on these needs you must define the value streams inside your company (all the activities which are needed to provide a particular product or service) and, later, the value streams in your wider supply chain as well. To satisfy customers you will need to eliminate or at least reduce the wasteful activities in your value streams that your customers would not wish to pay for.

The systematic attack on waste is also a systematic assault on the factors underlying poor quality and fundamental management problems.

### What is Value?

Value is what the customer wants. In general there will be a number of key dimensions of customer value (Value Attributes). Examples of Value Attributes include tangible elements such as product features, quality and delivery times as well as more intangible elements such as service and relationship. Each customer will have their own set of Value Attributes for different products and services, although groups of customers may be clustered into distinct market segments.

It is important to start by gaining an external view of value because a company's view of what is valuable to their customers is very often wrong or distorted. The description of the customers' value profile becomes the basis of understanding how to create a competitive advantage.

### What is Waste?

Waste is anything that does not add value to the customer. As a guide, seven wastes were identified as part of the Toyota Production System.

You might like to use the following chart to make a note of any of these wastes that are present in your business.

Based on past experience, Andrew Stewart from InteLog claims that an analysis of a typical supply chain would show 60 per cent of processes represent waste in terms of time, or 15 per cent in cost. A lean transformation program can increase productivity by 30 per cent, cut costs by 40 per cent and reduce inventory by 50 per cent.



## Getting the Balance Right

Clearly it is necessary to balance customer value with the cost of generating it in order to provide a competitive offering. This is true whether your organisation seeks to offer a premium, standard or budget product/service. In the following figure we can plot the degree of customer perceived value for a product or brand against the relative cost of providing it. This latter cost would include the waste involved in providing the product or service. Offerings that are in the premium market would be in the top right part of the figures, those in the budget end of the market, in the bottom left. However, any offering above the diagonal equilibrium line will add value to the customer. Firms in this position are likely to win market share and grow. Those below the line are much less likely to have a comfortable future. A common feature of lean businesses is their movement to an above-the-line position.

In order to develop a successful company one can either consistently and relentlessly remove waste and reach a very cost effective position for their offerings as illustrated by arrow 1. A good example of this is Toyota. Alternatively you might focus on adding incrementally or in a step-change way to the perceived value of your product (arrow 2) and achieve a world class market position. BMW have been very successful at doing this. Both of these lean strategies can be very effective and both Toyota and BMW are very profitable. However, for the typical company some combination of cost reduction and improved customer perception of their product is required to achieve world class status.

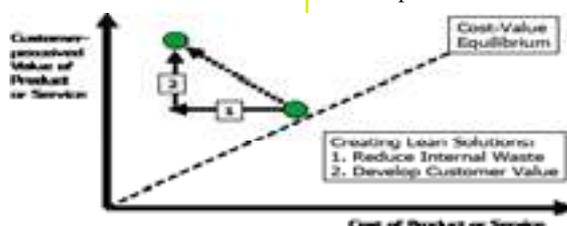
## An example from the Australian Food Industry

One Australian company has recently taken on lean principles with positive results. The National Food Industry Strategy (NFIS) supported a well known Australian Food Processing Company with a government grant to fund a Lean Enterprise program and reduce operational costs.

The program's objectives included understanding customer's needs, defining the internal business' value stream and aligning it to the customer and then eliminating waste. Other businesses who made up the value chain to supply the company's final product would also be integrated and aligned to customer value.

The company was looking for a systematic approach to managing its complex supply chain and they concluded that the best way for them to achieve that was by adopting the Lean Approach. They did that with the help of Andrew Stewart from Intelog and Professor Peter Hines from the Lean Enterprise Research Centre, Cardiff University, who is a world Leader in Lean principles and Lean Enterprise methodology.

They began with a "big picture" process mapping exercise. A cross functional



*Food Value Chains & the Concept of Lean  
continued*

team was formed with external representation from growers, outside suppliers including packaging manufacture and supply companies, inbound and outbound transport carriers and also a major retailer. By mapping all the processes from grower planning to delivering product onto the shelf, a big picture started to emerge.

It was agreed that even the most experienced employees, who felt they had a good grip on the company, came away enlightened. No-one really understood the whole picture. People who understood the product had no idea what customers were talking about and people who managed the customer had no idea about processes. As a result there were huge gaps of understanding.

Smaller sub groups made up of staff from businesses across the supply chain were formed to explore parts of the supply chain in more detail. These groups came up with some 300 specific opportunities – the outcome being a clear action list for improvements.

**Supplier management**

The concept of grower to grocer evolved to ensure suppliers looked beyond growing to understanding the fully supply chain and how they line-up and integrate with it. A particular focus was working with growers so they understood the company's demand and quality requirements.

From the process maps, the company began to set key performance measures for different parts of the business such as inbound delivery in full and on time as well as the development of a quality based payment system which encourages growers to product of a certain size, quality

and brix and against more reliable crop forecasts.

**Waste reduction at the factory level**

By bringing staff into the decision making process labour savings were also realised at the factory level. For example, one type of machine fundamental to the processing procedure had always required 2 operators to fulfil it's requirements in the factory line. However the team which had been set up to analyse labour usage identified an alternative (and safe) method of operating the same machine to deliver the same outcome using only one operator. As a result, now the machine can operate with one man where once there was two, potentially saving up to \$300,000 per year across the whole plant.

**The future**

The next step for the company is to further integrate their marketing and sales department to the supply chain overhaul. They want to see if there's anything they can add into their process in terms of performance indicators, and if there is anything they're measuring which perhaps they shouldn't be – or should be. By aligning supply chain and operations to marketing they're learning from each other.

Obviously every Business and every Supply Chain is different and in order to implement the principles of lean thinking for a successful outcome you need to work through a process similar to that of the company above.

If you are interested in exploring the opportunities to initiate a Lean project within your business and supply chain please contact Joanna Embry at Avocados Australia ph: 07 3391 2344



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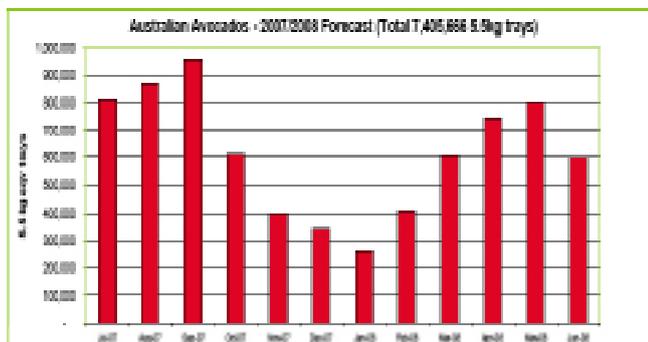
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# Infocado Update

## 2007/2008 Crop Forecast



Over the last 4 months (March, April, May, June) the Australian industry has on average sent into the market 159,000 trays per week.

Looking forward to the next 4 months (July, Aug, Sept and Oct), based on the forecasted crop in this report Australia we will need to market 180,000 trays of avocados per week.

Retail prices need to stay at the levels seen in June to maintain the volume through to consumers in the coming months.

It is very clear that high retail prices (above \$2.20) during March and April restricted the volume through to consumers and we have suffered from the back log of fruit since that period.

Working with your market trader and the retail operators continues to be extremely important to maintain retail prices and quality fruit for consumers.

### Crop forecasts by growing region for the year 2007/2008 (as at 31/6/2007)

Region	Forecast 5.5kg tray eqv
North Queensland	1,166,465
Central Queensland	2,774,187
Sunshine Coast	767,353
Southern Queensland	910,068
Northern NSW	283,765
Central NSW	622,141
Tri State	221,805
WA	659,882
<b>Total</b>	<b>7,405,666</b>

# Notice of the 4th Annual General Meeting

## Avocados Australia Limited ABN 87 105 853 807

Notice is hereby given to the voting Members of Avocados Australia Limited that the 4th Annual General Meeting of Avocados Australia Limited will be held at the I & A Tolson's, 238 Fishermans Reach Road, Stuarts Point, NSW, on **Tuesday 25 September 2007 commencing at 12:30 pm.**

### Business of the Meeting:

- To consider and approve the minutes of the 28th September 2006 Annual General Meeting**
- Chairman's Report**
- Chief Executive Officer's Report**
- Financial Statements and Reports**  
Presentation and consideration of the financial statements of the Avocados Australia Limited, Directors' and Auditors' Reports for the year ended 30 June 2007.
- Auditors**  
Appointment of auditors for the 2007-2008 financial year.
- Other Business**  
Consideration of any other business for which proper notice has been given.

By Order of the Board.

Antony Allen  
Company Secretary

If you are unable to attend the AGM, a member entitled to attend and vote, is entitled to appoint a proxy to attend and vote in their stead. Proxy forms will be provided directly to all members of Avocados Australia Limited.



# Avocado R&D & marketing program overview July 2007

**John Tyas**

*Industry Services Manager, Horticulture Australia*

Horticulture Australia Limited (HAL) is a national research, development and marketing organisation. HAL is an industry-owned company that invests more than \$80 million annually in research and development (R&D) and marketing projects for the benefit of horticulture. HAL works in partnership with the horticulture sector to invest in programs that provide benefit to Australian horticultural industries. The avocado industry invests through HAL in R&D and marketing programs using avocado levies and voluntary contributions. All R&D funds are matched, dollar for dollar, by the Australian Government through the HAL program.

The avocado investment program is reviewed and adjusted annually in line with the industry's strategic plan, developed in 2005. There are three key platforms of the strategic plan which are being addressed through various projects: 1. Projects to drive Revenue Growth, 2. Projects to improve Production and Marketing Systems, and 3. Projects to facilitate sound Industry Management.

The program is divided into 4 parts, those projects that are funded by:

1. Avocado grower levies,
2. "Voluntary contributions" (VC projects),
3. "Multi industry" projects where the avocado industry jointly funds a project with one or more industries (MT or HG projects) and
4. "Across industry" projects that are funded by all horticultural industries including avocados. (AH projects)

**VC** projects that relate to avocados can be found below with the grey shaded background.

**MT** or **HG** projects funded by avocado levies can be found below with the yellow shaded background.

**AH** projects can be found below with the blue shaded background

Below is a snapshot of the current avocado program funded through HAL. For further details on the specific projects, we encourage you to contact the relevant Principle Investigator.



*Know-how for Horticulture™*

## REVENUE GROWTH

**AV07500**

### Avocado domestic promotion program

**Project Start:** 2/07/2007

**Project Completion:** 30/06/2008

**Principle Investigator:** Ms Yelli Kruger,  
Horticulture Australia Ltd, [yelli.kruger@horticulture.com.au](mailto:yelli.kruger@horticulture.com.au)

**Service Providers:** Creative: De Pasquale

**Media Buying:** Initiative

**Consumer Research:** Bread & Butter

**Funding source:** Marketing Levies

## SUMMARY

This program aims to increase the consumption of avocados at profitable prices at grower level. The program is based on two main messages developed from consumer research in 2005, which are the versatility and health aspects of avocados. It will engage with its target audience (Female Grocery Buyers between 20 and 54 with an income of over \$35,000) through various channels. The tagline of the campaign is "Add 'n' Avo" which shows the easiness of adding avocados to a wide variety of dishes.

The campaign consists of 7 key activity areas funded from the marketing levy:

### Promotional Activities

1. Development of creative imagery
2. Consumer Advertising
  - a. Magazine
  - b. Television
  - c. On-Line
3. Website Development
4. Niche Market Advertising
5. Sampling
  - a. Health Environment
  - b. Word of Mouth
6. Nutritionist as spokes-person
7. Co-operative Promotion

### Development of Creative Imagery

New creative magazine advertisements will be created to add to the existing ones to ensure the advertisements still receive the attention needed for a good cut-through. We will add three more versatility ads, one health ad and one ad specifically targeted at the niche market of expectant mothers and mothers with toddlers under the age of 3.

In addition to that, the TV commercial will be 'streamed' so it can be added to the already existing online ads developed in 2005/06.

### Avocado R&D & marketing program overview July 2007 continued

#### Consumer Advertising

TV will provide avocados with exposure to a large audience and will create great awareness at the start of the campaign. Magazines are a great platform to educate consumers. On-line – one of the best features of on-line advertising is its measurability. It is now possible to measure how many people see your banner, print the recipe and click through to the avocado website. In addition to that, the target audience uses on-line very frequently, at least once a month if not weekly.

#### Website Development

It is of the utmost importance to ensure that the content of the avocado website is updated regularly and new and exciting recipes are added regularly. This will ensure that the avocado website will attract more returning visitors as well as attracting more new visitors.

#### Niche Marketing Advertising

The niche market which the avocado industry is focusing on this season is (expecting) mothers with young toddlers. We are reaching this audience by advertising in relevant magazines such as Mother and Baby and Practical Parenting.

#### Sampling

One of the issues which clearly came through in the market research of 2005 was that most consumers are very limited in what they actually know about how to integrate avocados into recipes, either hot or cold. Therefore sampling will be part of this campaign and this will take place in the following settings:

- Health environment – Through Fitness First Gyms which can provide avocados access to over 300,000 active members through sampling.
- Worth of Mouth - Research has shown that grocery buyers respond in a more powerful and visceral way to channels that treat them like a market of one. “Word-of-mouth recommendation tops the tree as the single most effective medium to influence purchase decision”. This will enable avocados to connect with consumers at the grass roots level and will specifically target mothers groups - parents with babies and small children

#### Nutritionist Spokesperson

It is also recommended that a nutritionist will be attracted who will act as a spokesperson on behalf of the avocado industry to emphasise the health message and make it more credible than it would be if the industry would solely be relying on paid advertising.

#### Cooperative Promotions

A small allocation has been made to encourage state organizations, market authorities, wholesalers and retailers to promote in a consistent manner to the nationally developed positioning to build brand equity.

#### AV07504

### Avocado consumer research and marketing development

**Project Start:** 01/07/2007

**Project Completion:** 01/09/2007

**Principle Investigator:** Ms Yelli Kruger,  
Horticulture Australia Ltd, [yelli.kruger@horticulture.com.au](mailto:yelli.kruger@horticulture.com.au)

**Service Provider:** Bread & Butter

**Funding source:** Marketing Levies

#### SUMMARY:

The aim of this project is to undertake consumer research in order to inform the consumer communication strategy going forwards.

The objectives of the research are:

1. Identification of the key communication contact points for vegetables and fruit, with particular regard to Avocados.
2. Assess the degree of fit between the contact points identified and the current media spend plan
3. Evaluate reaction to the current Avocados marketing communication material (TV, Recipe books, web site, POS etc.). This across the following levels:
  - That the intended central message of versatility is being communicated
  - Assess reaction to the tone and manner of communication
  - Aid development as required of any marketing communication material
  - Understand reaction to a potential food service proposition

#### AV07003

### Determination of health promoting bioactives in Australian avocados

**Project Start:** TBA - PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** Food Science Australia,  
Dr Dimitrios Zabararas, [dimitrios.zabararas@csiro.au](mailto:dimitrios.zabararas@csiro.au)

**Funding source:** Matched R&D levies

#### SUMMARY

The proposed project will generate valuable information about the levels of beneficial components found in Australian avocado fruits and assess their potential health-promoting effects. This information could then be used as a tool to further promote/market avocados and strengthen their position in the mind of the national and international public.

*Avocado R&D & marketing program overview July 2007*  
continued

## **MT06064** **Food Service Research – Phase 1**

**Project Start:** 01/05/2007

**Project Completion:** 01/09/2007

**Principle Investigator:** BIS Shrapnel Pty Ltd

**Funding source:** Matched R&D Levies

### **SUMMARY**

This project will fund the purchase of a number of reports from key food service studies in Australia, New Zealand and Asia. These reports will provide valuable input to the development of the food service strategic plan developed through AV06029.

Foodservice channels are growing in importance within the Australian food retail market. As a result of changing lifestyles, household demographics, food shopping habits and competition for discretionary consumer spending increases in both the volume and value of foodservice will continue to grow dramatically. To date, this growth has not been as a planned industry driven market development activity which would ensure maximum benefit to Australian horticultural industries.

It has been estimated that the food service market is growing at twice the rate of food and grocery sales through supermarkets. In the US, the value of the food service market in 2003 was \$426B and the take home food market through all retail outlets was \$449B. Food market analysts indicate that Food service will soon overtake retail. In Australia, the local foodservice market has been valued at \$28B including liquor whilst the retail take home food market including liquor is \$59B. Given the trends in the US, Australia is in for a rapid growth in the foodservice sector over the next 5-10 years if parity between the foodservice sector and the retail sector is achieved.

Maximizing these opportunities for Australian horticultural suppliers is a key component of ongoing sustainability. Providing the information and tools to develop these opportunities is the key rationale for the project.

## **AV07013** **Econometric evaluation of promotion**

**Project Start:** 1/10/2007

**Project Completion:** 30/05/2008

**Principle Investigator:** Horticulture Australia Limited,  
Mr Clinton Skeoch

**Funding source:** Matched R&D Levies

### **SUMMARY**

This project aims to investigate the return-on-investment (ROI) by media channel, store level marketing activity and competitive activity on total volume avocado sales. The specific objectives are: to understand the returns of advertising on volume sales to inform media choice and weights for 2008, and to understand the impact of competitive high end salad ingredients and spreads on volume sales.

Commencement of the project is dependant on the effectiveness of the model to assess ROI on the 2006-07 campaign.

## **AV07507** **Export Marketing**

**Project Start:** 1/07/2007

**Project Completion:** 30/06/2008

**Principle Investigator:** Horticulture Australia Limited,  
Ms Yelli Kruger, [yelli.kruger@horticulture.com.au](mailto:yelli.kruger@horticulture.com.au)

**Funding source:** Marketing Levies

### **SUMMARY**

This budget allocation is to cover the marketing activities under the export portfolio, some of which are detailed as follows;

- International Trade Point of Sale Material
- International Exhibitions
- International Business to Business Ventures

More detailed activities are yet to be determined as they are linked to the development of the export marketing plan.

## **AV06029** **Investigation, analysis & development of a strategic plan to maximise avocado sales in the food service markets**

**Project Start:** 02/06/2007

**Project Completion:** 31/12/2007

**Principle Investigator:** Richard de Vos

**Funding source:** Matched R&D Levies

### **SUMMARY**

The last 10-20 years have seen amazing growth and sophistication in the 'Food Service' market in Australia. Underpinning this have been marked changes in peoples eating habits and styles together with lasting demographic changes.

Any food manufacturer and producer must take this growth in away-from-home eating very seriously. It is a long-term and growing trend that all must address. To do so, avocados must have a thorough understanding of the Food Service market.

Armed with that information, individual businesses can then plan their

### Avocado R&D & marketing program overview July 2007 continued

own market development strategies and so can the industry as a whole. For a whole-of-industry approach, a strategic plan is required.

This project will:

- Undertake comprehensive research to provide qualitative and quantitative information on the Food Service market.
- Collate that information into a position paper to inform industry and stimulate whole-of-industry planning and action; and an information handbook for industry participants.
- Facilitate an industry strategic planning process for the Food Service market.
- Develop and finalise the avocado industry Food Service Strategic Plan

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#### **AV07009** **Avocado industry development in food service and communications**

**Project Start:** TBA - PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** Antony Allen, Avocados Australia, [ceo@avocado.org.au](mailto:ceo@avocado.org.au)

**Funding source:** Matched R&D Levies and Unmatched Marketing Levies

#### **SUMMARY**

This project will span a number of interrelated areas relating to marketing, promotion, communication and the food service sector. An important aspect of this project will be “bridging the gap” between the commercial suppliers of avocados and food service operators.

The key components will be:

1. Food service development (50%). The development of new opportunities in food service for avocados, increasing awareness and demand for avocados through strategic communications that strongly encourages demand for and use of fresh avocados by key food service operators in menu extensions and new innovative applications.
2. Communications and industry positioning (50%). Communication of the overall positioning of the Australian avocado industry across the range of stakeholder groups, by providing industry with a program that addresses food safety, environmental stewardship, social awareness and sustainability; strengthen consumer awareness of fresh avocados nationally; communicate the nutritional benefits and versatility of avocados to drive avocado consumption.

The project will employ a food service and communications manager for the avocado industry.

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#### **PRODUCTION AND MARKETING SYSTEMS**

##### **AV07000**

#### **Improving yield and quality in avocado through disease management**

**Project Start:** 2/07/2007

**Project Completion:** 30/09/2010

**Principle Investigator:** QLD Department of Primary Industries & Fisheries Dr Fiona Giblin, [fiona.giblin@dpi.qld.gov.au](mailto:fiona.giblin@dpi.qld.gov.au)

**Funding source:** Matched R&D levy

#### **SUMMARY**

The aim of this project is to improve avocado fruit standards by optimising fruit yields, fruit quality and tree health while, in alignment with changing attitudes, reducing the use of chemicals to control diseases in orchards. Avocado fruit are downgraded or destroyed by fungal diseases causing anthracnose and stem-end rot. Root rot caused by *Phytophthora cinnamomi* constrains productivity and if not actively controlled will eventually kill an avocado tree. Of increasing concern, has been the anecdotal evidence of the spread of the brown root rot fungus, *Phellinus noxius* and little is known of its impact on the avocado industry.

It has become evident that rootstocks have significant influence on the overall health of the avocado tree so it is vital that attributes of the many rootstocks available worldwide are assessed for their superiority (and suitability) in Australian conditions. The aim is to select rootstocks with superior tolerance to root rot and, at the same time, have a positive impact on fruit yield and fruit quality. The use of phosphorous acid in avocado is essential to maintain economic yields and high quality fruit even with relatively tolerant rootstocks. Current data suggests that timing of application is critical as seasonal growth patterns can significantly influence movement of chemicals in a tree. It is important that the current application programme is evaluated and the cost effectiveness of application improved. In addition to optimising phosphorous acid application, new products such as defence activators and systemic fungicides with improved post-infection activity will be assessed for their effectiveness in disease control.

The project will focus on 3 main areas:

1. Improved management of root rot caused by *Phytophthora cinnamomi*.
2. Improved management of fruit diseases such as anthracnose and stem-end rot.
3. A scoping study to determine the incidence, severity and control options of the fungus, *Phellinus noxius*.

Industry will benefit with:

1. Improved selection of root rot tolerant rootstocks suitable for Australian conditions
2. Improved fruit yields and quality
3. More efficient integrated management of root and fruit diseases

## Avocado R&D & marketing program overview July 2007 continued

4. Improved cost effectiveness of phosphorous acid application
5. An impact study on the occurrence, incidence, economic impact and control options of *Phellinus noxius*

### AV03005 Harvest temperature effects on postharvest avocado quality

**Project Start:** 30/07/03

**Project Completion:** 10/11/2007

**Principle Investigator:** Mr Alec McCarthy, Department of Agriculture Western Australia, [amccarthy@agric.wa.gov.au](mailto:amccarthy@agric.wa.gov.au)

**Funding source:** Matched R&D voluntary contribution

#### SUMMARY

High quality avocado fruit is essential to maintain and indeed improve consumer confidence in avocados. In efforts to provide quality avocados, certain harvesting parameters have been recommended for growers to follow. Internationally it is accepted that growers should aim to harvest at temperatures below 30 degrees C and commence cooling of harvested fruit within 6 hours of harvest. These recommendations are based on limited research worldwide. Growers in Western Australia, who harvest during the warm summer months, have indicated that having to stop harvesting when the temperature reaches 30 degrees C is increasingly difficult as property sizes and yields increase.

This project aims to quantify the effect of high ambient (and pulp) temperature at harvest on the quality of avocado fruit post harvest to enable recommendations to be made to allow for harvesting during hot weather. This will increase the harvest flexibility for growers in areas of high temperatures during harvest whilst minimising impact on fruit quality at the retail point.

### AV07005 Sustainable fruit quality through yield improvement

**Project Start:** TBA – PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** QLD Department of Primary Industries & Fisheries, Dr Danielle (Marie) Le Lagedec, [danielle.lelagadec@dpi.qld.gov.au](mailto:danielle.lelagadec@dpi.qld.gov.au)

**Funding source:** Matched R&D levy

#### SUMMARY

Despite considerable research effort, avocado fruit quality remains a problem for the industry, slowing domestic and export expansion. The aim of this project is to develop a reliable technique to test fruit

robustness prior to the harvesting season. If a commercial application for the technology can be demonstrated early in the project, the fruit robustness test will be further developed and tested on a wider scale. It is planned that once a fruit robustness test has been developed, it may be offered as a regular service to growers.

There are considerable observations that a close positive correlation exists between crop load and fruit quality. Poor yielding trees often tend to produce fruit of poor quality with limited shelf life. This adversely affects the marketing potential and reputation of the industry. If the growers and market coordinators are aware of fruit quality issues prior to harvesting, they may be equipped to make well informed decisions regarding their marketing strategies.

### AV04007 Rootstock Improvement for the Australian Avocado Industry - Phase 2

**Project Start:** 1/01/2005

**Project Completion:** 30/05/08

**Principle Investigator:** Dr Anthony Whiley, Sunshine Horticultural Services Pty Ltd, [whileys@bigpond.com](mailto:whileys@bigpond.com)

**Funding source:** Matched R&D levies

#### SUMMARY

The Australian avocado industry has continued to expand for the most part, using an ad hoc range of rootstocks selected by nurserymen for which there is no data to substantiate their performance. Despite a technically sound nursery scheme (ANVAS) to supply disease-free, true-to-type trees to industry, the development and use of superior rootstocks largely remains in limbo. 'Velvick', (predominantly West Indian race), is one local rootstock selected about 20 years ago where a body of performance data is slowly being developed both within Australia and overseas.

Recent studies in Australia comparing postharvest anthracnose development of 'Hass' fruit from trees grafted to different rootstocks, have found that fruit from one line developed less disease compared with others. During the first 3 year stage of this project a range of rootstocks from both Mexican and Guatemalan race populations were identified and propagated as either seedlings or vegetative clones. They were then grafted to either 'Hass' or 'Shepard' and planted out in replicated experimental blocks in the major avocado production districts of Australia.

The second phase of this project will monitor the performance of the experimental trees in the various locations where experimental sites have been established. Additionally, rootstocks from the elite recovery program in Phase 1 will be multiplied for field planting and evaluation while new selections will be recovered when identified.

Avocado R&D & marketing program overview July 2007  
continued

### AV04008

#### The development of canopy management strategies suited to the different growing environments across Australia for increased profitability

**Project Start:** 1/07/2004

**Project Completion:** 31/8/2008

**Principle Investigator:** Dr John Leonardi, Avocados Australia, [j.leonardi@avocado.org.au](mailto:j.leonardi@avocado.org.au)

**Funding source:** Matched R&D levies

#### SUMMARY

Maintaining a profitable avocado orchard means having a reliable crop each year. Managing the tree canopy is one of the major production issues confronting the Australia avocado industry. The avocado tree must produce new growth each year to remain productive, 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.

Previous work on canopy management (AV00007) made significant advances in mechanised pruning techniques and growth regulator application in warm, subtropical environments, and the review of canopy management systems (AV02006) identified several strategies currently employed by individual growers in the main production districts. However, further work is required to identify canopy management strategies that can be successfully implemented in all major growing areas before wider industry recommendations can be made. The proposed project, conducted by Dr John Leonardi, will evaluate the 'most promising' canopy management systems in terms of cost of operation, impact on yield, fruit quality and tree size and the net return per hectare. Studies on the timing of pruning and of growth regulator application to minimise regrowth and maximise fruit yield and fruit quality under Australian conditions are also proposed.

Results from this research will form the basis of new recommendations for canopy management systems for the Australian avocado industry.

### AV06001

#### Improving spraying and management of spotting bugs in avocados

**Project Start:** 1/07/2006

**Project Completion:** 1/10/2008

**Principle Investigator:** Growing Greener Growers, Dr Henry Drew, [hjdrew@ozemail.com.au](mailto:hjdrew@ozemail.com.au)

**Funding source:** Matched R&D levy

#### SUMMARY

The aim of this project is to hold practical, hands-on one-day

workshops on spotting bug management and sprayer calibration in the main avocado growing regions in Australia.

The workshops would be held on-farm and involve spotting bug monitoring techniques, pest and damage identification, hands on sprayer calibration, spray assessment using water sensitive papers and calibration calculations. The workshops would update growers on canopy volume concepts and recent product label changes relating to Dilute and Concentrate spraying, to complement the 1997 manual on Efficient Pesticide Use in Tree Crops.

The workshops should result in better monitoring and management of spotting bug including improved spray application and effectiveness. Improved calibration should result in fewer sprays applied, lower off-target impacts, better quality fruit and improved returns to growers. It will also give the participating growers the skills to continually adapt their practices to new challenges.

### AV06006

#### Scoping of a national avocado quality system and management of avocado industry information systems

**Project Start:** 1/10/2006

**Project Completion:** 30/09/2009

**Principle Investigator:** Avocados Australia, Ms Joanna Embry, [infocado@avocado.org.au](mailto:infocado@avocado.org.au)

**Funding source:** Matched R&D levy

#### SUMMARY

The aim of this project is multifaceted. Firstly it aims to identify where the industry currently sits in terms of quality and productivity. It provides a management role to a separate supply chain project aimed at identifying points in the supply chain where issues related to productivity and product quality should be addressed. It also aims to develop a system (based on learning from overseas and other industries) for developing a quality standard and maintaining that standard. Additionally it aims to implement a system for forecasting future production and monitoring changes in productivity over time.

Two of the main issues which impact on the returns to avocado growers are related to fruit quality management and the efficiency of avocado production and marketing systems. Both of these issues are being addressed through this project.

The implementation of a productivity data collection system and the outcomes from the supply chain project will provide growers with the tools to benchmark their productivity and quality against the industry as a whole and to identify where issues impacting on quality and productivity occur. Similarly the rest of the supply chain including wholesalers, marketers, pack houses, ripeners and retailers will have the opportunity to achieve this outcome with regard to quality. The scoping of a quality management system will provide the potential for businesses to be rewarded for supplying a resulting higher quality product. The crop flow (infocado) and productivity data collection

## Avocado R&D & marketing program overview July 2007 continued

system will also provide the industry as a whole with more accurate and timely short term and long term information to assist in planning affective marketing programs over time.

### MT06022

#### Generation of dimethoate and fenthion residue samples to maintain market access

**Project Start:** 01/07/2006

**Project Completion:** 30/05/2009

**Principle Investigator:** Dale Griffin,  
Agronico Research Pty Ltd

**Funding source:** Matching R&D Levies

#### SUMMARY

The Australian Pesticides and Veterinary Medicines Authority (APVMA) are re-evaluating pesticides as part of its Chemical Review Program. The re-evaluations are undertaken to ensure they meet current standards of safety and performance. As part of this process both dimethoate and fenthion are currently being reviewed. It is likely that some uses for dimethoate and fenthion will become restricted or removed following the review by the APVMA.

This project, which covers most of the horticulture industries potentially affected by this APVMA review and in which the avocados industry is participating, addresses the most likely data gaps which are necessary to maintain market access, mostly domestic, for the identified industries to the extent feasible. In the project, there is a trial on avocados in the first year for pre-harvest uses of both dimethoate and fenthion.

HAL and DAFF through OCPPO (Office of Chief Plant Protection Office) are coordinating this issue with industry, State and Federal Governments to minimise the negative impact upon market access and maximise regulatory harmonisation. This research is an important part of the Horticulture Industry's Market Access Strategic R&D Plan and is being administered by HAL through the Industry's Working Group for Market Access R&D.

### AV06020

#### Avocado carbaryl residue trials

**Project Start:** 30/11/2006

**Project Completion:** 30/06/2008

**Principle Investigator:** Agronico Research Pty Ltd,  
Dale Griffin,

**Funding source:** Matched R&D Levies

#### SUMMARY

Using the current and more stringent assessment criteria, a recent review found that the residue data which underpins the registration of Bugmaster® Flowable Insecticide for use in avocado crops is insufficient.

Unless additional, supportive residue data is generated and submitted to the APVMA, then this registration will be suspended or cancelled.

Therefore, 2 residue studies, conducted according to the principles of "Good Laboratory Practice" (GLP), will be undertaken across 2 seasons; the first during the 2006/2007 avocado season and the second during the 2007/2008 season. Both studies will be conducted in Queensland.

The GLP recognised company, Agronico Research Pty Ltd will conduct the field-phase of these studies. Bayer CropSciences will fund and conduct the residue analysis at their analytical laboratory; and will fund and complete the regulatory affairs component of this project, which includes submitting the data to the APVMA.

### AV07001

#### Investigation of the distribution and incidence of Avocado sunblotch viroid in Australia

**Project Start:** TBA – PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** QLD Department of Primary Industries & Fisheries, Dr Andrew Geering

**Funding source:** Matching R&D Levies

#### SUMMARY

Avocado sunblotch viroid (ASBVd) is a serious constraint to avocado production in many of the major production areas of the world such as the USA. Australian researchers were the first to characterise this pathogen in 1981 and have played a pivotal role in elucidating its biology. However, despite these great achievements in fundamental research, surprisingly little is known about the distribution of ASBVd in Australia: there are only two official records of the pathogen in Australia, both from avocado variety collections held by research organisations at Alstonville in NSW and Merbein in Victoria and both records date back to the early 1980s. Since 1981, avocado nuclear stock from which nursery propagation material has been sourced has been tested for ASBVd as part of the Avocado Nursery Voluntary Accreditation Scheme. As ASBVd has no known insect vector, the use of clean planting material is generally regarded as being an effective control method for the pathogen. It would appear that that this nursery accreditation scheme has been successful as typical sunblotch symptoms are rarely reported now in Australia. However, ASBVd can persist in trees and not produce overt foliar symptoms (but still cause substantial yield decline) and thus its presence may have been overlooked.

Area-freedom from ASBVd would provide great benefits for the Australian avocado industry, especially by opening up market opportunities through the removal of quarantine barriers preventing the international trade of fruit to some countries. Official recognition of area freedom from any pathogen is guided by the International Plant Protection Convention, which states that pathogen-free status must first be established and then be maintained through a range of

### Avocado R&D & marketing program overview July 2007 continued

regulatory actions, routine monitoring and the provision of extension advice to producers. In this project, baseline data will be provided on the distribution of ASBVd in Australia, which will form the basis of any decisions to seek area-freedom status from ASBVd, or alternatively, if ASBVd is found, provide information on its economic impact. To process the large numbers of samples arising from the surveys, it is necessary to develop high throughput testing methods utilising automated equipment, the second objective of this project.

#### **AV07012** **Investigation of the potential application of Export Efficiency Powers**

**Project Start:** TBA – PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** Horticulture Australia Limited, Mr Wayne Prowse

**Funding source:** Matching R&D Levies

#### **SUMMARY**

No summary available. This project is currently under development.

### **INDUSTRY MANAGEMENT**

#### **AV06003** **Study groups to achieve globally competitive avocados**

**Project Start:** 15/12/2006

**Project Completion:** 31/5/2010

**Principle Investigator:** Simon Newett,  
QLD Department of Primary Industries & Fisheries,  
[simon.newett@dpi.qld.gov.au](mailto:simon.newett@dpi.qld.gov.au)

**Funding source:** Matched R&D levy

#### **SUMMARY**

Avocado fruit consumption must keep pace with expansion in plantings and production to keep the industry profitable. Part of the solution is to improve fruit quality to encourage repeat sales and to lower, or at least contain, the per unit production costs to keep fruit prices affordable and competitive. Addressing these must start at a grower level. Avocado production is also expanding rapidly in countries with low production costs. Imports of cheap fruit pose one of the greatest threats to the Australian industry. It is therefore essential that we improve our competitiveness for the long term viability of our industry. Much of the technology and information to achieve better quality and productivity is already available but adoption needs to be improved. The aim of this project is to improve the productivity and fruit quality of the Australian avocado industry through better communication of technology and production knowledge.

The main strategy is to establish 10 regional study groups across Australia. Each group will identify production issues that are

preventing them from raising their production and fruit quality. The study groups will serve as the vehicle for conducting regular workshops on these issues. Regular briefings will also be held for service providers and information material will be available to all. The project will draw upon the knowledge and skills of R, D & E officers across the country for input into workshops, briefings and information material. The proposed outputs include establishment of regional grower study groups, regular extension activities with these groups, briefings for service providers, information material for producers and identification of critical production success factors. Outcomes will include an accelerated rate of practice change that will improve yields and fruit quality and minimise per-unit production costs.

#### **MT06046** **PHA National Fruit Fly Coordinator**

**Project Start:** TBA – PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** Plant Health Australia,  
Miss Kimberly Green,  
[kgreen@phau.com.au](mailto:kgreen@phau.com.au)

**Funding source:** Matched R&D levy and matched R&D voluntary contribution

#### **SUMMARY**

Fruit flies are the single biggest impediment to production and trade of fruit fly host horticulture in Australia.

The vision of the National Fruit Fly Strategy (NFFS) is to remove fruit flies as a significant barrier to national and international market access. The goal of the NFFS is to gain a viable, cost-effective and sustainable national approach to fruit fly management which will place Australia in the forefront of international biosecurity, with all stakeholders committed to the national policy which underpins this approach.

The NFFS will identify strategies, priorities and funding models. It will be a long term national approach to all components in fruit fly management including research, policy development, surveillance and operational roles across the biosecurity continuum (i.e. pre-border, border, post-border, regional, property). The outcomes from the NFFS are to achieve gains for the application of current and future industry and government commitments.

Plant Health Australia (PHA) was recommended to co-ordinate the development of the NFFS in collaboration with industry and government jurisdictions involved in horticulture and fruit fly policy development and implementation. This multi-industry project will partly fund a coordinator for 12 months

#### **AV07010** **Infocado information extension project**

**Project Start:** TBA - PROJECT NOT YET APPROVED

## Avocado R&D & marketing program overview July 2007 continued

**Project Completion:** TBA

**Principle Investigator:** TBA

**Funding source:** Matched R&D Levies

### SUMMARY

No summary available. This project is currently under development.

#### AV06002

### Improving technology uptake in the WA avocado industry

**Project Start:** 1/11/2006

**Project Completion:** 30/08/09

**Principle Investigator:** Mr Alec McCarthy, Dept of Agriculture, WA, [amccarthy@agric.wa.gov.au](mailto:amccarthy@agric.wa.gov.au)

**Funding source:** Matched R&D voluntary contribution

### SUMMARY

The project 'Improving technology uptake in the WA avocado industry' will develop and implement enhanced communication strategies based on the demographics of the industry and run on site demonstration activities to enhance the uptake of identified improved practices for the continued development of the WA avocado industry into a sustainable, profitable and internationally competitive industry.

Low uptake of improved production and business practices generally across the WA avocado industry has been identified as an impediment to improved long term profitability. The low uptake is the result of poor communication strategies that have not taken into account the industry demographics as well as a general industry hesitation to embrace the new technology. Identified problem areas include poor irrigation and nutrition efficiency, ineffective canopy management, poor frost control and inconsistent yields.

Through improved communication strategies and increased uptake of better production and business practices, the WA avocado industry will continue to grow in a sustainable manner and remain profitable. This will be achieved through increased production; maintenance of product quality and improved efficiency, the industry will improve their competitiveness on world markets and as a result increase their market share. The progress of the WA avocado industry will aid the national avocado industry to meet its industry goals.

#### AV06028

### Avocado R&D Road Show 2007

**Project Start:** 20/6/2007

**Project Completion:** 31/1/2008

**Principle Investigator:** Antony Allen, Avocados Australia, [ceo@avocado.org.au](mailto:ceo@avocado.org.au)

**Funding source:** Matched R&D Levies

### SUMMARY

The Australian Avocado industry has set out in its 2005-2010 Strategic Plan to, "Create general industry awareness and rapid uptake of the successful outcomes from the R&D into production and marketing systems improvement.". Currently there are a number of tools to satisfy this goal, although Avocados Australia is always seeking to improve and innovate its delivery methods for R&D outcomes.

The Australian Avocado industry like all industries undertaking R&D needs to insure the widest and most affective method of adoption. This project seeks to deliver R&D outcomes through a method last used successfully in 2003. Avocados Australia has sort to bring to R&D to the regions, delivering to the seven major avocado growing areas across Australia a field day that is aimed at exchanging information and technology between the growers in a particular region and the R&D providers undertaking work on behalf of the industry. As a direct consequence of presentations by our R&D providers, many more growers in the industry will have access to information which can be incorporated into their business strategies, providing direct economic benefits to growers.

#### AV07011

### Biosecurity Detailed Planning

**Project Start:** TBA – PROJECT NOT YET APPROVED

**Project Completion:** TBA

**Principle Investigator:** TBA

**Funding source:** Matched R&D Levies

### SUMMARY

No summary available. This project is currently under development.

#### AV07900

### Avocado partnership agreement

**Project Start:** 1/07/2007

**Project Completion:** 30/06/2008

**Principle Investigator:** Antony Allen, Avocados Australia, [ceo@avocado.org.au](mailto:ceo@avocado.org.au)

**Funding Source:** Marketing levies and matched R&D levies

### SUMMARY

This project covers a range of activities to be conducted by HAL and Avocados Australia in managing the avocado levy investments. These include: management of the Industry Advisory Committee; conduct of the Annual Levy Payers Meeting; effective consultation between Avocados Australia, the broader avocado industry and HAL; effective consultation between Avocados Australia and HAL on levy funded programs, and implementation of an effective industry communication strategy.

*Avocado R&D & marketing program overview July 2007*  
continued

## **ACROSS INDUSTRY PROGRAM**

The across industry R&D program is funded through matched R&D levies and voluntary contributions. A contribution of 2% from all HAL-funded R&D projects is allocated to the across industry program to fund much needed R&D that is required by all industries.

<b>Project No</b>	<b>Title</b>	<b>Project Start</b>	<b>Project Completion</b>	<b>Organisation</b>
<b>Outcome 1: Enhance the efficiency, transparency, responsiveness and integrity of the supply chain for the total industry to provide clear market signals.</b>				
AH04007	Pesticide regulation coordinator	2004/05	2009/10	AKC Consulting Pty Ltd
AH04009	Coordination of minor use permits for horticulture	2004/05	2007/08	AgAware Consulting Pty Ltd
AH06004	Horticulture Code of Conduct – Industry Support Package	2006/07	2007/08	Horticulture Australia Council
AH07001	Horticulture Statistics Database	2007/08	2007/08	Tendering Management
AH07021	Pesticide monitoring	2007/08	2007/08	Horticulture Australia Ltd
<b>Outcome 2: Maximise the health benefits of horticultural products in the eyes of consumers, influencers and government</b>				
AH07006	Promoting the health advantages of fruit and vegetables to increase their consumption	2007/08	2009/10	Chris Rowley
AH07007	Horticulture Wellbeing Initiative	2007/08	2007/08	Horticulture Australia Ltd
<b>Outcome 3: Position horticulture to compete in a globalised environment</b>				
AH07002	HAL Market Access Coordination	2007/08	2008/09	Stephen Winter and Associates Pty Ltd
AH07003	Market Access Support Program	2007/08	2009/10	Horticulture Australia Ltd
AH07017	Codex Committee on Fresh Fruit and Vegetables Participation	2007/08	2007/08	Horticulture Australia Ltd
<b>Outcome 4: Achieve long-term viability and sustainability for Australian horticulture</b>				
AH06002	Horticulture Industry Strategic Plan	2006/07	2008/09	Horticulture Australia Ltd
AH06007	Industry involvement in the Development of Primary Production and Processing Standards	2006/07	2007/08	Horticulture Australia Ltd
AH06015	Cooperative venture for capacity building (CVCB) membership fees	2006/07	2007/08	RIRDC
AH07009	Horticulture Water Initiative	2007/08	2009/10	Horticulture Australia Ltd
MT07029	Managing pesticide access in horticulture	2007/08	2009/10	AgAware Consulting Pty Ltd

# On the road to achieve consumer acceptability

Summarised from Final Report AV06025

**by Joanna Embry**  
Australian Avocados

Australian consumers have recently been employed to tell the Australian Avocado Industry exactly what quality they expect in an avocado and at what point a bad experience will prevent them from coming back to buy another one!

One of the objectives identified in the Australian Avocado Industry 2005 to 2010 Strategic Plan was that by 2010, 90% of fruit at retail level will meet or exceed the fruit quality expectations of consumers. Avocados Australia have recently completed the first part of a project to quantify what those quality expectations are, where we are currently placed in achieving that 90% goal and more importantly what impact that has on increasing avocado purchases.

Consumer research conducted in 2005 indicated that there are still problems with both the quality of avocados reaching the consumer and the ability of consumers to determine when the product is ripe for consumption. Earlier results from the Avocare project completed in 2001 also showed that there was a high proportion of fruit in the market which had a high level of internal quality problems.

More recently a report was commissioned by Avocados Australia and Horticulture Australia Ltd to pull together all available research regarding avocado maturity. The report highlighted the consumer acceptability issues associated with immature avocados (rubbery texture, uneven ripening, too soft, stringiness, watery and bitter flavours) as well as a gap in available research linking the current industry accepted minimum of 21% Dry Matter (DM) as an indicator of maturity with consumer acceptability - especially for Australia's most common commercial variety, Hass.

The 2005 consumer research results indicated that by addressing these quality issues there are significant gains to be made in moving low and medium frequency avocado consumers into higher frequency buying brackets and thereby increasing overall consumption. In order to do this, however there is a need to quantify the level of quality that is currently available to consumers and the points at which improvement will increase consumption.

In light of this background research, in May, HortResearch was commissioned by Avocados Australia to undertake consumer sensory testing to address three strategic questions for the Australian avocado industry:

1. To determine the minimum maturity, as measured by % dry matter (DM), that produces 'Hass' avocados which are of acceptable eating quality to Australian consumers.
2. To determine the level of ripeness (firmness) that is preferred by consumers at the time of consumption.
3. To determine the maximum acceptable level of internal defects (bruising) at different price points above which future consumer purchasing decisions are negatively influenced.

Research was undertaken in Brisbane using 107 consumers from the

industry target demographic (29 to 40 year olds), and recruited on the basis that a third fell into each of the categories of 'high frequency', 'medium' and 'occasional' eaters of avocados. The 'Hass' avocados were sourced from



a wide range of locations (South East, Tablelands, Bundaberg and Atherton localities within Queensland, and WA) in order to ensure DM levels varied from about 17% to about 44%. All fruit were successfully ripened and sorted into four distinct DM bands (~20%, ~22%, ~26% and ~38% DM) of similar firmness, and three distinct firmness bands (~1.05kgf ("firm ripe"), ~0.65kgf ("ripe") and ~0.45 kgf ("soft ripe")) of similar DM content. Consumers tasted avocados from all these 'quality' categories, and also assessed firmness of whole fruit. For the latter, additional avocados from a firmness category of ~5 kgf ("sprung") puncture force were also provided.

## Results

### Maturity

Consumers showed a progressive increase in liking and intent to buy avocados as the DM content increased, however at 28% DM purchase intent was maximised and further increases in maturity did not result in further improvements in consumer willingness to buy avocados.

There was an approximately linear increase in liking and purchase intent that occurs as DM increases from 22% to 28%. Thus, improvements in DM in this region have the potential to stimulate consumer demand and consequently increase prices or increase volume of sales (see figure 1).

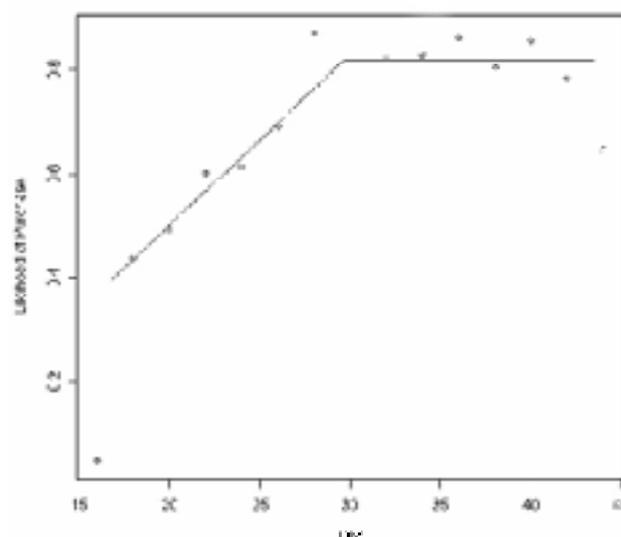


Figure 1: DM vs Likelihood of purchase

On the road to achieve consumer acceptability  
continued

**Ripeness**

Consumers assessed firmness of whole fruit as well as the tasting of the avocado flesh. After handling (squeezing) avocados from the hardest firmness categories (~5 (“sprung”) and ~1.05 kgf (“firm ripe”)) the consumers indicated that they would leave the avocados to eat/use on a later date.

Consumers who tasted avocados indicated that on average the fruit that were about 1.05 kgf firmness were significantly less liked, less likely to be purchased and less acceptable than fruit that were 0.65 kgf “ripe” or 0.45 kgf “soft ripe”

Refer to figures 2, 3 and 4

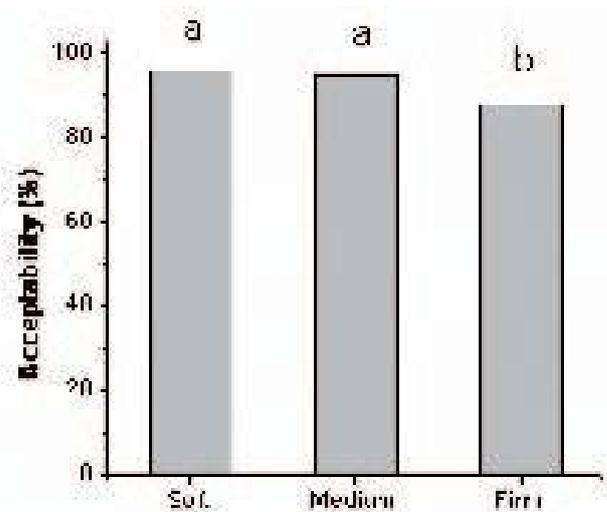


Figure 2: Acceptability for different levels of ripeness

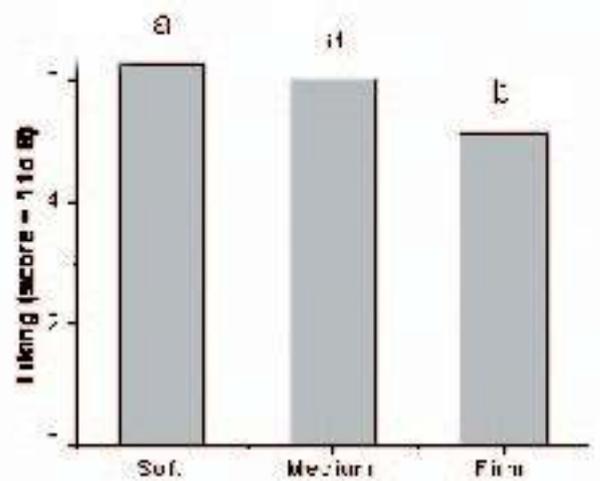


Figure 3: Liking score for different levels of ripeness  
Liking score 1 = dislike very much and 8 = like extremely

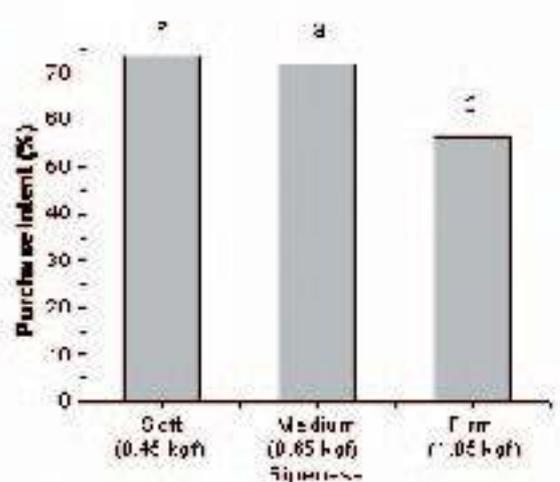


Figure 4: Purchase intent for different ripeness levels

On the road to achieve consumer acceptability  
continued

**Visible internal defects**

A conjoint study approach was used to explore the impact of bruising on consumer preferences. The study has demonstrated that all three experimental factors (i.e., price, level of bruising and incidence of bruising) significantly lower consumers' future purchase decision.

Bruising of avocados needs to be minimised in order to maintain high future purchase probability. Generally, only the lowest levels of bruising (e.g. 10% flesh damage) at very low incidences (e.g. 1 in 5 or 1 in 10 avocados) were acceptable in terms of not reducing consumers' purchase intent below 70% ('probably buy'). A higher level of bruising (25% flesh damage) was acceptable if it occurred at a very low incidence (1 in 10 avocados), but only at the lowest prices. Refer to Table 1 following

Price=\$1.29		Incidence			
Bruising	1 in 10	1 in 5	3 in 5	5 in 5	
10%	0.95	0.87	0.68	0.57	
25%	0.76	0.68	0.49	0.38	
33%	0.68	0.60	0.41	0.30	
50%	0.58	0.50	0.31	0.20	

(A)

Price=\$1.99		Incidence			
Bruising	1 in 10	1 in 5	3 in 5	5 in 5	
10%	0.84	0.79	0.59	0.52	
25%	0.63	0.58	0.39	0.31	
33%	0.59	0.54	0.35	0.27	
50%	0.45	0.40	0.20	0.13	

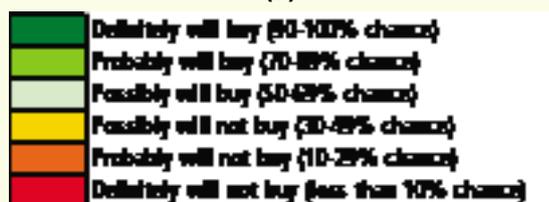
(B)

Price=\$2.49		Incidence			
Bruising	1 in 10	1 in 5	3 in 5	5 in 5	
10%	0.71	0.62	0.47	0.37	
25%	0.55	0.46	0.31	0.21	
33%	0.50	0.41	0.26	0.16	
50%	0.41	0.32	0.17	0.07	

(C)

Price=\$2.99		Incidence			
Bruising	1 in 10	1 in 5	3 in 5	5 in 5	
10%	0.61	0.54	0.43	0.37	
25%	0.36	0.29	0.18	0.12	
33%	0.38	0.31	0.20	0.14	
50%	0.31	0.24	0.13	0.07	

(D)



**Table 1:** Prediction of future purchase probability at fixed price points.  
 1A) Purchase probabilities at the \$1.29 price point;  
 1B) Purchase probabilities at the \$1.99 price point;  
 1C) Purchase probabilities at the \$2.49 price point; and  
 1D) Purchase probabilities at the \$2.99 price point.

In order to develop a full understanding of the current situation and a plan for future improvements a number of activities are still to be completed within the next 12 months. They include:

- A supply chain mapping exercise and resource audit to determine the critical control points within the supply chain that impact on fruit quality and supply chain efficiency and the resources currently available to address issues experienced at those points.
- Online consumer research (additional to the consumer panels conducted in Brisbane) specific to visible internal quality issues to supplement the Brisbane results by widening the demographic, including internal defects other than bruising and including more extensive questions.
- A 12 month survey of the retail sector (including avocado sampling in stores across capital cities). Surveys will be conducted on a monthly basis, measuring fruit quality at retail and the proportion that meets consumer expectations (as per the results from the consumer panels and additional online research).

As this work is being completed Avocados Australia is also conducting a review of quality standards/accreditation systems in other industries and countries with a view to implement an appropriate system for the Australian industry in the future. If, after thorough research and consultation it is agreed that this will achieve the quality outcomes necessary to reach our quality targets as an industry and increase consumer demand to the benefit of all members within the industry, a plan will be developed to implement an appropriate quality mark and system.



## Protecting Livelihoods and Lifestyles **Biosecurity Explained**

This is the first in a series of articles prepared by Avocados Australia and Plant Health Australia to explain 'biosecurity' and the very important role we all have in its management.

### **What is it?**

Put simply, 'biosecurity' is everything we do to protect our crops and orchards from exotic pests and diseases extending from the border to the paddock.

### **Biosecurity involves:**

- Identifying and prioritising the pests that pose the greatest threat
- Stopping these pests entering Australia
- Making sure that exotic pests are not already here
- Identifying exotic pests early and reporting their presence; and
- Responding to any exotic pest outbreaks detected, or what we also call 'incursions'.

### **Why is it important?**

With the ever-increasing risk of catastrophic damage to our crops/orchards by exotic pests, good crop protection practices have never been more important. In addition, the ability to trade our fruit/

produce/plants/grains/etc overseas, interstate and even regionally depends on how well we manage biosecurity.

### **Who's who?**

Any form of security, whether it is protecting the country, people's health or our crops/orchards requires a tremendous co-ordinated effort. In responding to pest incursions agreed arrangements are in place to have governments, industries, researchers and others working together. The key players in developing and deploying biosecurity measures are:

- Each industry, as represented by their peak industry body - in our case Avocados Australia.
- State and Federal government departments
- Researchers and experts with the skills to analyse and accurately identify priority exotic pests
- Plant Health Australia, whose role it is to work with, support and coordinate the efforts of everyone.

And of course, each and every grower in the country. Growers are likely to be the ones who will first spot and report a problem and who have a crucial role through farm management and hygiene practices in preventing the entry and establishment of plant pests and diseases.

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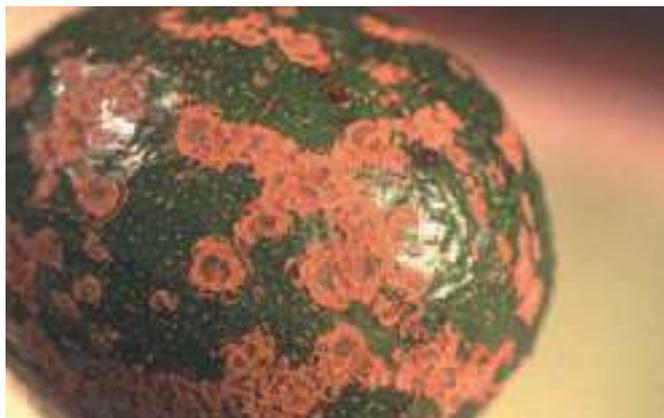


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**Email: [jctann@bigpond.com](mailto:jctann@bigpond.com)**



\* Quoted by Tony Whitley, Industry Consultant at the Australian and NZ Avocado Growers Conference 2001

*Biosecurity Explained*  
continued



**The foundations**

Rigorous planning and good systems are the keys to sound biosecurity. In future articles, we'll explain each in more detail, but in short, here's what is involved:

Our Industry Biosecurity Plan

Our own comprehensive plan which details our most dangerous potential pests; analyses the risk for each pest; outlines what must be done to safeguard against them; and identifies key industry roles, responsibilities and useful contacts.

**PLANTPLAN**

This is the 'battle plan' which guides action if an incursion occurs including the preparation of pest and location specific response plans. It sets out who will do what, when and how. It's tried and tested, and very comprehensive.

**Emergency Plant Pest Response Deed**

A landmark legal agreement between plant industries (including the Avocado industry) and the Australian and State/Territory Governments. It outlines the governments' commitment to supporting industries if an outbreak occurs; how combating an outbreak is paid for; and industry's responsibilities in preventing or reporting an incursion. Importantly, it provides for grower reimbursements if an agreed response requires destruction of their crop – for more information visit the PHA website: [www.planthealthaustralia.com.au](http://www.planthealthaustralia.com.au).

**Every growers' responsibility**

Each and every grower has a great responsibility to ensure good biosecurity. There are very practical steps that you must take on your farm to reduce the risks for your business and for the industry as a whole. Action by your neighbours will also be important. These steps are not difficult, make good business sense, and they will help.

Every grower and their employees have a critical role in looking out for anything unusual. Not just a casual glance over the crop/orchard, but a program of careful, regular inspection. This alert observation is the single most important weapon in our campaign to maintain good biosecurity in Australia.

**Spotted Anything Unusual?**

Plant Health Australia (PHA) is a peak body providing national coordination to improve biosecurity across Australia's plant industries and capacity to respond to plant pest emergencies when they arise. PHA works with its Members to manage projects and contribute to the development of national plant health policy and capability in Australia.

The vision we share through these partnerships is leading to an internationally outstanding plant health management system that enhances Australia's plant health status and the sustainability and profitability of plant industries.

**Securing your crop/orchard**

For more information on what to look for and what to do on your farm, contact Antony Allen at Avocados Australia on 07 3391 2344

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# Analysis of Canopy Management Strategies (AV04008)

**By John Leonardi**  
*Avocados Australia*

There are several canopy management strategies being implemented by growers throughout the different growing areas across Australia, including selective limb removal, selective and mechanical pruning, staghorning/stumping, tree removal, cincturing and plant growth regulators. At many sites a combination of strategies are being used

(eg. mechanical pruning, selective pruning and application of plant growth regulators).

The project aims to provide information on the costs of canopy management operations (\$/ha/year) and examine the effect of these strategies on productivity (t/ha/year). A summary of several canopy management options is presented in Table 1.

Region	Orchard description	Canopy management system/s	Length of pruning cycle (years)	Canopy management costs (\$/ha/yr)	Productivity rating since pruning (t/ha/yr)
N Qld	Shepard planted:1993 Spacing: 10 x 5m (200 trees/ha) Pruning: 2000-2006	Selective limb removal and mulching	7	960	18.0
Central Qld	Shepard planted:1990 Spacing: 9 x 6m (185 trees/ha) Pruning: 2000-2006	Selective limb removal, mechanical pruning, plant growth regulators & mulching.	7	1957	15.5
Central Qld	Hass planted:1994 Spacing: 10 x 5m (200 trees/ha) Pruning: 2000-2006	Selective limb removal, mechanical pruning, plant growth regulators & mulching	7	2100	21.0
Central Qld	Shepard planted:1993 Spacing: 10 x 5m (200 trees/ha) Pruning: 2002-2006	Mechanical and selective pruning, plant growth regulators and mulching	5	940	15.4
Central Qld	Hass planted:1993 Spacing: 10 x 5m (200 trees/ha) Pruning: 2002-2006	Mechanical pruning, selective limb removal, plant growth regulators and mulching	5	2530	17.4
Southern Qld	Hass planted:1993 Spacing: 12½ x 6m (133 trees/ha) Pruning: 2001-2006	Mechanical and selective pruning, plant growth regulators, painting of exposed branches and mulching	6	2467	11.5
Southern Qld	Hass planted:1989 Spacing: 10 x 5m (200 trees/ha) Pruning: 2002-2006	Staghorning, selective pruning and chipping of branches	5	1160	6.1
Southern Qld	Hass planted:1989 Spacing: 10 x 5m (200 trees/ha) Pruning: 2002-2006	Selective pruning and chipping of branches	5	540	6.9
Northern NSW	Hass planted:1994 Spacing:7 x 5½m (260 trees/ha) Pruning: 2001-2006	Selective limb removal, terminal pruning and mulching	6	2550	9.8
Central NSW	Hass planted:2000 Spacing: 9 x 5m (222 trees/ha) Pruning: 2004-2006	Selective limb removal and chipping of branches	3	1067	10.6
Tri-State	Hass planted:1998 Spacing: 6 x 3m (555 trees/ha) Pruning: 2002-2006	Selective pruning to maintain row access. Tree removal – trees thinned to 12 x 3m (278 trees/ha)	5	430	5.5
Tri-State	Hass planted:1991 Spacing: 6 x 5m (333 trees/ha) Pruning: 2004-2006	Selective/mechanical pruning, plant growth regulators and mulching	3	3922	14.1

## Analysis of Canopy Management Strategies continued

WA	Hass planted:1988 Spacing: 6 x 5m (333 trees/ha) Pruning: 2002-2006	Selective pruning and mulching	5	1500	27.2
WA	Hass planted:1982 Spacing: 7 x 7m (204 trees/ha) Pruning: 1998-2005	Selective limb removal, mechanical pruning, staghorning, tree removal and replanting	8	1641	11.4
WA	Hass planted:1997 Spacing: 7 x 3.5m (408 trees/ha) Pruning: 2000-2005	Mechanical pruning, selective limb removal and tree removal	6	1100	12.2

### Sunny® application on stumped/staghorned trees:

Staghorning is a process where trees that have become too large to be effectively managed are cut back to a stump and allowed to regrow. Staghorned trees can take several years before they come back into commercial production. Sunny® has been demonstrated to reduce shoot growth and increase flowering in pruned trees.

A trial was established in south-east Queensland to investigate the effect of Sunny® application on shoot growth, flowering and yield in stumped 'Hass' avocado trees. Trees were stumped after harvest 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. The effect of treatment on shoot growth and flowering was assessed in 10 shoots in each tree in August 2006 (Table 2). In May 2007 the number and weight of fruit harvested at maturity was recorded in five trees per treatment.

Table 2 The effect of Sunny® treatment on shoot growth and flowering in stumped Hass avocado trees. Shoot length and flowering percentage data are means of 50 shoots from five trees per treatment. Fruit 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	Fruit size (g)	Yield (kg/tree)
Untreated	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 February & May	58.9 b	94 c	45.6	270.2	11.9
2% Sunny® in February & May	55.3 b	96 c	34.8	260.8	9.0

Sunny® application significantly reduced shoot growth and increased flowering in stumped trees. There was also a trend for an increase in yield in trees treated with 1 and 2 % Sunny® in May compared with untreated trees.

### Canopy Management Field Days

A series of field days on canopy management have been conducted during the past three months. Field days were held in Renmark (9th May), Mildura (12th May), Pemberton (16th May), North Queensland (24th May), Sunshine Coast (17th July) and Childers/Bundaberg (19th July).

These field days give growers an opportunity to observe a range of canopy management strategies and identify systems that may be

suitable for their own production situations. The outcomes of the national canopy management project and results from plant growth regulator trials are also presented.

The next field days will be held in: ; Mid North Coast NSW (Tuesday 21st August); Central Coast NSW (Thursday 23rd August); Southern Queensland (Thursday 25th October) and Perth (Thursday 6th December).

### Acknowledgements

Thanks to growers who have hosted the field days and provided information on their canopy management operations. This project is funded by using avocado grower R&D levies which are matched by the Australian Government through Horticulture Australia.

# Sunfresh Thailand Export Promotion report

## April and May 2007

Prepared for  
Sunfresh Marketing Co-Operative Pty Ltd

By Judy Prosser and Mark Johnston

Avocado sales have been increasing in Thailand for Sunfresh over the last 2 years. As result a joint promotion was undertaken funded by the Thai Importer, Sunfresh and HAL and Avocados Australia through the avocado cooperative export promotion program. The month long Promotion included providing information, in store tasting, recipes, increasing awareness of avocado and editorial in local media and TV advertisements.

Sunfresh participated in the promotion from 19th April 2007 to 20th May 2007 with the aim of further developing export sales of avocados into Bangkok and other Thai regional centres and providing advice on handling, storage and management of fruit.

The main objectives included:

- Increase sales into Thailand;
- Increase awareness and nutritional value of Australian avocados;
- Increase handling requirements;
- Increase awareness of the range of uses for avocado;
- Create a new market for sprung fruit;
- Promote the clean green concept of Australian product;
- Increase export efficiencies, and
- Increase knowledge of the Thai culture and further business relationships
- Visit markets

Sunfresh Board Director, Tom French and Grower Liaison, Mark Johnston participated in assisting with implementing the Promotion on their arrival in Bangkok. Activities included providing advice to Choice Foods Sales Team and staff on handling and appropriate storage for avocados, training a team of Promotional Consultants (PC) to be engaged for in store activities, and visiting a range of supermarket outlets to gain a better understanding of Thai culture and their consumption of avocado. During the last few days of the promotion Brian and Judy Prosser arrived in Bangkok from Hong Kong after



Promotional Consultant training

showcasing avocados and other fruit at Hofex on the HAL stand. We elected to do two trips, one at the beginning of the promotion to assist in set up, monitor the first shipment of avocados for the promotion and educate the promotional team in best practice techniques. The second trip was an opportunity to discuss the finalisation of the promotion, continue visitations to the supermarkets running the promotion and establish strategies with the Choice team in ensuring sales remain high and further increased sales in the supermarkets and food service business.

## 1. Activity Description- Choice Foods

### 1.1 In store promotion timing and requirements

The details of the promotion plan were provided on arrival at Choice Foods. This included providing the necessary knowledge for Choice staff to handle fruit during transport on receipt, the importance of appropriate storage temperature regimes for holding fruit, monitoring and maintaining records for a better understanding of quality control.

A program was developed for the Sales Team and staff to prevent problems previously encountered such as chill damaged fruit and breakdown. This knowledge was welcomed and implemented immediately.

The promotion included the use of PCs for a three week period on a daily basis to engage consumers and provide information, recipes and tasting samples. Before the PCs could begin, a training session was provided as many of the girls were unfamiliar with the handling and use of avocados. With the use of interpreters and Choice Foods Director, Bob Coombs the PCs were trained in preparation of fruit for tasting, cultural information on the tree and fruit development, various uses for avocado and nutritional value of avocados.

Each PC was provided with a kit which included a Sunfresh shirt and apron, items for tasting, information pamphlets and recipes translated into Thai. At the end of the training session the PCs were excited, confident and ready to promote Australian avocados.



Australian Fruit 20 Count

## Sunfresh Thailand Export Promotion report continued

### 1.2 Fruit receipt in Bangkok and related handling issues

Transport timing and temperature was an issue for maintaining fruit quality. Due to movement restrictions on trucks from the Bangkok airport into town during the hours of 16:00 -18:00, Choice Foods staff were unable to load and transport fruit to their coolrooms without breaking the cool chain. High humidity during this time appeared to cause cartons to become soft while handling and stacking and fruit exposed to ambient temperature caused rapid chill loss. This is the result of fruit being unloaded at the Bangkok Airport at 16:00hrs at ambient temperatures in excess of 30°C.

A temperature logger was placed in the consignment of fruit to quantify the temperature variances the fruit experienced during transport from Sunfresh in Australia to the Choice facilities in Bangkok. The logger was retrieved while unloading fruit and the subsequent data downloaded indicated temperature increases from time of landing in Bangkok to placing in cool store at Choice.

Training & demonstrations were provided to Choice Storemen on correct air stacking of pallets to assist with re-cooling of fruit and temperature management. Transfer of this knowledge was appreciated and will go far toward maintaining fruit quality and holding ripened and green fruit to suit marketing needs in the future.

### 1.3 Fruit ripening, storage and handling

Previous consignments of fruit had been ripened on site in Choice Foods refrigerated containers. This proved problematic as temperatures of 22°C and above were being used for ripening then once sprung, holding temps of 0°C until distribution. This regime resulted in some fruit break down before distribution or after delivery to customers. Evidence of this was found in WA Hass in one supermarket.

Time was spent with Choice Foods staff to develop a greater understanding of avocado handling and potential problems due to temperature mismanagement. A program was delivered for temperature ripening, holding and monitoring using temp probes and logs to maximise fruit

integrity pre and post delivery to customers.

## 2. Client education regarding handling & storage

Information provided to Choice with regard to avocado handling and storage for their purposes, could be used for their clients and dissemination was encouraged for in store education.

Examples of individual pieces fruit being cling wrapped in store increased the risk of breakdown, particularly in stores that had non refrigerated displays. This type of packaging if possible was to be discouraged

## 3. Ripe for Tonight campaign

A culture of hard green fruit existed but an increase in consumption was evident if customers could access ready to eat avocado. This was observed on a number of occasions. The change in culture with supermarkets would require support with handling information relevant to display types within stores. This information was provided to the Choice Sales Team as they were the most appropriate contacts to do this.

During supermarket visits the PCs were observed engaging the public offering avocado for tasting and providing information about the fruit supported by recipe booklets translated into Thai.

This personalised service provided by the PCs resulted in a greater uptake by consumers. Over the period of the promotion, a three fold increase in sales occurred. The PC service supported by high quality sprung fruit exceeded the desired outcome.

Visits to representative supermarkets and retail outlets involved in the avocado promotion provided an indication the buying patterns and availability of avocados. It was found most outlets sold hard green fruit from Israel and the US, Hass variety. Stores supplied by Choice had Sunfresh Shepard and Hass. The Shepard was close to ripe but the Hass hard green.

It was obvious that avocado was not a regular shopping item and quality/ripeness had a lot to do with consumer purchase. Fruit displayed ranged from a small display of 12 fruit, to baskets containing



BigC Supermarket



BigC Supermarket

*Sunfresh Thailand Export Promotion report continued*

many pieces, to prepacked, either as individual or 2 packs in a tray. Refrigerated displays were evident in approx. 40% of the stores.

The fruit provided for the promotion was sprung ready to be eaten that day or the day after. Ready to eat fruit appeared to be a definite influence in customer's decision to purchase. This was a clear advantage over the availability and culture of hard green fruit that consumers were accustomed to.

Supermarkets that started the promotion indicated increased sales. Villa, for example, after the first week had sold in two days what it normally sells in eighteen. Other stores demonstrated similar patterns with great interest being generated by the 'Ripe for Tonight' promotion. Buying patterns also changed; customers previously observed buying hard green fruit would only purchase a single piece whereas ripe fruit were being purchased at three or four pieces per customer. Speaking with supermarket staff about the interest in the promotion supported what we had observed. This provided a measure of effectiveness of the campaign, allbeit in the early stages of the promotion. Choice not only increased the food services business but also had 54 supermarkets agree to sell at not more than 40 baht. Three full page articles written in English press were aired on 3 television channels with 30 different time slots during the course of the promotion.



Instore promotion



**4. Summary of avocado presence in Supermarkets prior to Promotion**

Supermarket visit prior to promotion	Status
EMPORIUM Department Store	Shepard only with some fruit individually shrink wrapped priced at 65Baht (\$2.32A) while others had been in store prepacked x2's at 95Baht (\$3.39). Displayed well and un-refrigerated.
VILLA Supermarket	Villa was selling both Hass from WA and the USA. The WA Hass were displayed in original trays but quality was very poor with some fruit in a state of breakdown and others with less obvious internal rots. It appeared this fruit had been subject to wrong storage temperatures. These fruit were selling at 75Baht (\$2.67) per piece. Also on display were the US Hass in hard green condition but at 80Baht (\$2.85) per piece or in net bags at 225Baht (\$8.00).
FUJI Supermarket	Small Australian Hass display of hard green fruit in a refrigerated cabinet. Selling by single piece at 69Baht(\$2.32)
TOPS SupermarketT	Had some Sunfresh Hass 28 count and Israeli Hass count 20 for sale. Display none refrigerated and fruit hard green.
FOODLAND Supermarket	Foodland had a good display of Sunfresh Shepard in a refrigerated cabinet. Single piece sale of 49Baht (\$1.75). Unfortunately fruit had suffered inappropriate storage temperatures and displayed signs of breakdown.
CENTRAL Foodhall	The Central Food Hall had a large display of a wide range of fresh produce. Avocados were displayed in a refrigerated cabinet. Imported Israeli Hass selling for 79Baht (\$1.75) by the piece. The fruit was hard green with some lenticel damage
CENTRAL WORLD	Good display of non refrigerated US Hass. Fruit hard green count 23 selling for 69Baht (\$2.45).
BIG C Supermarket	Large supermarket with a small display of Shepard. Fruit good quality pre packed in store by 2 displayed in a refrigerated unit. Pre packs selling for 95Baht (\$3.39).
PARAGON Supermarket	Selling Sunfresh Shepard and Hass. Good presentation in non refrigerated display. Shepard selling individually for 59Baht (\$2.10). In store pre-pack by 2s, hard green fruit in both cases.

Sunfresh Thailand Export Promotion report  
continued



PC in Villa Supermarket

**CONCLUSION**

The Promotional partnership between Sunfresh, Choice Foods and HAL/Avocados Australia has proved successful in promoting avocados in Thailand. A positive outcome was achieved as a result of increased awareness and resulting logistic improvements by Choice Foods with regard to:

1. better fruit handling and movement;
2. better temperature management of sprung/green avocado;

3. improved understanding identifying temperature related problems and post harvest disease management;
4. knowledge understanding of the ripe concept

The exposure of avocado in a form ready to eat proved to generate significant interest as opposed to hard green fruit. The Sunfresh name, will as a result of the Promotion, become synonymous with quality avocados in the market place and lead to increased consumption.

The pilot Ripe for Tonight promotion provided an insight into the potential in the Thailand market. It's anticipated the current avocado sales through the major chain stores will develop significantly for quality Australian avocados. The positive outcomes gained by this promotion would see further marketing and promotional development result in Sunfresh establishing a strong position and reputation in Thailand and improve the reputation of Australian product.

As a result of the promotion, the relationship with the Thai importer and Sunfresh has strengthened significantly and possibilities a follow-up campaign is already being planned.

This project was funded under the **Avocado Co-operative Program: Export Market Development** which is a competitive funding process where commercial operators within the avocado industry contribute to the funding of projects. Please find an opportunity to participate in the next round of funding for the program in this edition of Talking Avocados.

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# Avocado R&D Road Show 2007

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## Program

8:00 am	Welcome
8:30 am	<i>Tony Whiley</i> – Avocado Researcher "Rootstock improvement for the Australian avocado industry – Preliminary results"
8:55 am	<i>John Leonardi</i> – Avocado Researcher "The canopy management dilemma – What are the options?"
9:20 am	<i>Joanna Embry</i> – Program Manager: Infocado, Quality, Productivity "Fruit volume and quality: how it impacts on our markets and what our consumers want"
9:45 am	<i>Antony Allen</i> – Avocados Australia CEO "Team Add an Avo: Driving demand for avocados in retail and food service in Australia"
10:15 am	Break
10:45 am	<i>Ken Pegg</i> – Plant Pathologist "Rootstocks and the war against Phytophthora"
11:05 am	<i>Fiona Giblin</i> – QDPI Plant Pathologist "Recent advances in the avocado disease battle front"
11:25 am	<i>Celia Himmelreich</i> – ACCC "The Horticulture Code"
12:00 pm	<i>Henry Kwaczynski</i> – Chair of Avocados Australia "Industry leadership and the way into the future"
12:25 pm	Lunch
2:00 pm	Farm Walk
3:30 pm	<i>Panel of Wisdom</i> Question and Answer Session with all Presenters
4:30pm	Finish Drinks

The "Road Show" offers to all growers the opportunity to learn, inspect and discuss various horticultural techniques and technologies in practice, as well as the opportunity to examine many current research sites to see some of the alternative strategies being investigated by researchers. It is an opportunity to discuss the interpretation and implementation of research outcomes at a regional level and to see current on farm research and practical applications of previous research in the growers own growing region.

Have direct access to all these experts and the Avocados Australia team to extract the information you need to work smarter, improve your productivity and increase your bottom line. The day is all inclusive, R&D Experts, Industry Leadership, food and drinks will be supplied, for a very small registration fee of \$33.

Avocado R&D Roadshow 2007  
continued

R&D Road Shows will be held on the following dates in the regions below:

Road Show Region		Date
<b>South Queensland</b> @ Ravensbourne (near Esk)	Completed	10 July 2007
<b>North New South Wales</b> @ Duranbah	Completed	12 July 2007
<b>Tristate</b> @ Mildura	Thurs	30 Aug 2007
<b>Western Australia</b> @ Pemberton	Tues	4 Sept 2007
<b>Central New South Wales</b> @ Stuart's Point (south of Coffs)	Tues	25 Sept 2007
<b>Central Queensland</b> @ Bundaberg	Tues	2 Oct 2007
<b>North Queensland</b> @ Walkamin (Atherton Tablelands)	Thurs	4 Oct 2007

Please complete the enclosed blue registration form and return it to Avocados Australia



This Road Show is made possible through the through the active participation of the sponsors and the speakers as outlined in the program. It has been partially funded using avocado grower levies which are matched by the Australian Government through Horticulture Australia. It has also been funded through sponsorship contributions and the generous support of the venue host.



Know-how for Horticulture™

# News from around the world

## Chile set to address sector crisis

The Chilean Fresh Fruit Association is calling for 1,000 delegates to come to an emergency industry meeting on August 8 to urge the national government to take action in the face of the Chilean fruit sector's "dramatic loss of competitiveness".

According to the association, large exporters are selling off swathes of their land while small- and medium-sized operators are working at a loss as the cost of labour has risen by 20 per cent in three years. "There is mass discontent in our sector in the face of this situation and it needs to be given public expression," said association president Ronald Bown, who is co-organising the event with producers' federation Fedefruta.

The meeting hopes to come up with a clear way forward for the government in four specific areas: the labour market, plant health protection, scientific research and technology, and Chile's international image. Four committees have been set up to gather proposals in the month leading up to the event. Source: Fructidor

## Big Game Day fields 53.5 million pounds of Hass Avocados

Fans celebrated this year's Big Game by consuming an unprecedented 53.5 million pounds of Hass Avocados. If poured onto Miami's Dolphin Stadium football field, these Hass Avocados would cover the field more than 20 feet deep, end zone to end zone.

"Coordinated harvesting efforts with growers and producers from California, Mexico, Chile and the Dominican Republic supplied the country's Big Game Day celebrations with an unprecedented amount of Hass Avocados this year," said José Luis Obregón, managing director of information technology for the Hass Avocado Board (HAB). "The Big Game Day is traditionally the highest consumption day of the year, and by working together, we were able to meet high consumer demand for Hass Avocados."

Concentrated efforts drove consumers to [avocadocentral.com](http://avocadocentral.com), which provided suggestions on ways to use Hass Avocados in their celebrations. Football fans responded by consuming approximately 107 million Hass Avocados at Big Game Day parties. Source: HAB

## NZ Apples Exports to Taiwan Suspended

Biosecurity New Zealand announced today it was temporarily suspending exports of apples to Taiwan after receiving confirmation, from Taiwanese officials, of a codling moth larva find in a consignment earlier this week.

Biosecurity New Zealand Senior Advisor, Peter Johnston says this is the first interception of this pest on New Zealand apples during more than 20 years of exports.

"This is a testament to the rigorous orchard management and postharvest treatment and inspection regime Biosecurity New Zealand has in place for the certification of apples being exported to Taiwan. A Taiwanese biosecurity official had a recent opportunity to audit and endorse our systems. No problems had been identified."

Mr Johnston says the suspension will remain in place at least until New Zealand reports back on its investigations of the production site and pack house involved.

"This investigation will involve a full and thorough check of the entire affected apple pathway to confirm that procedures and processes have been adhered to. If this investigation identifies any flaws, BNZ will address these.

"New Zealand is committed to dealing promptly with this issue. We are inviting Taiwan to join us in the investigation. Officials are also in contact with the New Zealand pipfruit industry about this matter."

Codling moth (*Cydia pomonella* L.) is a serious pest of apples and is present in most apple producing countries including New Zealand. However, it is absent from Taiwan where it is regarded as a bona fide Quarantine Pest. Source: Rural Press

## Mexican-grown avocados allowed into California

California avocado growers are suing the federal government for ending a nearly century-old quarantine and permitting. The suit contends that the Mexican avocados contain pests that threaten the \$341 million California industry.

The U.S. Department of Agriculture on Feb. 1 ended a 93-year-old ban. It had been phased out slowly and until this year had limited importation of Mexican avocados to 47 states.

The California Avocado Commission and two growers said the end of the quarantine in California, Florida and Hawaii created "an imminent threat" to the state industry.

"Shipments of infested Mexican avocados are being routinely permitted to enter the U.S. through federally supervised checkpoints," said the suit, which was filed in U.S. District Court on Tuesday.

Some imported avocados shipped on Feb. 1 were found to contain "scale insects of unknown species or species not known to occur in California," according to the suit.

The suit asks the court to bar the government from allowing Mexican avocados into California until risks of an insect infestation have been scientifically determined.

USDA officials had not seen the lawsuit and could not comment on it but the agency's Animal and Plant Health Inspection Service has been working "very closely with the California Department of Food and Agriculture to resolve the issue" of pests, spokeswoman Andrea McNally said Wednesday in Washington, D.C.

In February, state and federal agriculture officials visited Mexican avocado groves and packing houses and U.S. federal inspection points and reviewed "pest risk prevention practices", she said.

The California Avocado Commission promotes and researches issues ranging from production to sale of avocados grown in the state. It represents about 6,000 commercial avocado growers in the state and their 21,000 employees, the lawsuit said. Source: The Associated Press

*News from around the world  
continued*

### **Capps Co-Sponsors US Avocado Bill**

Measure Aims to Ensure Imported Fruit's Quality. California representatives introduced a bill in Congress last week to ensure the high quality of imported avocados.

State regulations require that domestically grown avocados meet a minimum maturity standard, as well as predetermined size and weight requirements. Avocados grown abroad, most notably in Mexico, Chile, and the Dominican Republic, have not had to meet the same standards. The lack of uniform quality requirements may damage the demand for all avocados, claim the bills supporters.

On April 26, Senator Barbara Boxer — along with congresswoman Lois Capps and Congressman Darrell Issa — presented the Quality Assurance Act in both the House and the Senate. The proposed bill is designed to protect the interest of the consumer, while facilitating fair competition among avocado growers both in California and abroad.

The bill would require all imported Hass Avocados meet the same quality standards as the avocados grown in California.

"This bill will ensure that consumers have access to the highest quality Hass avocados," said Capps in a statement on Thursday. "And it will also level the playing field by promoting fair competition between domestic and international avocado growers."

The bill has strong support from California's avocado growers, among them the California Avocado Commission. Boxer and Capps will work to integrate this legislature into the farm bill.

Source: Santa Barbara Independent

### **Consumers hoop it up with California Avocados in March**

The California Avocado Commission (CAC) partnered in March with two-time NCAA championship tournament participant and four-time NBA champion John Salley to serve as a media spokesperson for its California Avocados & March Madness public relations blitz.

While basketball fans across the country watched the National Men's College Basketball Championship Tournament unfold, the CAC public relations team executed a comprehensive publicity campaign to encourage inclusion of California Avocados in basketball tournament party menus.

CAC's nationwide media outreach highlighted the fact that hoop fans would consume more than 30 million California Avocados - about 15 million pounds - during tournament festivities, illustrating the point with two quick and tasty recipes. Salley and CAC developed a new tournament party recipe, "John Salley's Slam Dunk Guacamole," which was pitched to the media. Salley traveled to Atlanta, the site of the tournament's semi-final and championship rounds, to conduct a full day of media interviews. He delivered key California Avocado messages and discussed his favorite tournament party foods featuring California Avocados.

"Every occasion that brings people together is an opportunity to

consume avocados. The tournament provides a series of opportunities for themed promotions featuring avocados," said Jan DeLyser, CAC's vice president of marketing. "The March timing was perfect for the kick-off of California's avocado harvest." Source: HAB

### **Chilean Avocado Media Tour reaches 100 editors with 33 million readers**

The pages of women's and food and beverage magazines have proven effective channels to reach consumers with messages designed to create increased awareness and sales of food products. With that in mind, a three-city blitz of magazine food editors by the Chilean Avocado Importers Association (CAIA) created a winning approach that enabled the CAIA team to talk directly with more than 100 editors and, through them, create the potential to reach 33 million readers.

"We created three presentations featuring Chef Ruth Van Waerebeek, author of *The Chilean Kitchen*," explained Maggie Bezart, director of marketing. "She is a Chilean food expert who is internationally recognized in the food and culinary world."

The tour stopped in three key publishing markets, Des Moines, New York and Birmingham, Ala. CAIA's gift to each editor was the chef's new cookbook and a complete press kit, which were also hand delivered or mailed to those who were unable to attend the presentations.

Chef Van Waerebeek demonstrated four recipes from her cookbook and also discussed Chilean cuisine and agriculture.

Source: The Associated Press

### **Korea second largest export market for U.S. avocados**

Korea was the second largest export market for U.S. avocados in CY 2005. Korea is expected to increase avocado imports as local importers and the Korean food industry make additional inroads in introducing avocados to Korean consumers. Entry of Mexican avocados into Korea in 2006 could represent new competition for U.S. suppliers. Initialization of U.S. avocado marketing efforts in Korea could help maintain U.S. share in the growing market. Source: USDA

### **Hong Kong: Tougher food-imports laws underway**

Hong Kong is drawing up laws to more stringently regulate vegetable, fruit, fish and seafood imports, Secretary for Health, Welfare & Food Dr York Chow said during his visit to the Netherlands.

Arriving at the Hague this morning, Dr Chow met Ministry of Agriculture, Nature & Food Quality Director-General Renee Bergkamp to learn about the Netherlands' control of food imports and its food-safety control regime.

He noted that unlike the Netherlands which can take advantage of the European Union's complex system in controlling food import, Hong Kong has a more active part to play in administering its own control in collaboration with the exporting countries which contribute more

### News from around the world continued

than 90% of the city's food supply.

Officials told Dr Chow the country and its EU counterparts are considering making labelling of nutrition content of food mandatory. Currently, food with nutritional claims already comes under mandatory labelling requirement. Source: Fresh Plaza

### New Zealand apples exports delayed

New Zealand apples have still not been cleared for export to Australia despite an agreement across the Tasman months ago to let them in.

Biosecurity Australia agreed in February to end the ban on the importation of apples from New Zealand, which had been in place for more than 85 years. But quarantine inspections on orchards in Hawke's Bay have yet to happen, meaning that the apples are not cleared for exporting.

Chairman of Pipfruit New Zealand, Ian Palmer, said that for the sake of the industry this situation would have to change. He said that the delay seemed to be due to Australian bureaucracy and he is alleging political interference.

The ban on the New Zealand apples entering Australia was in place to prevent spread of the fireblight disease. The fruit will be imported under strict conditions and will not be sent to Western Australia. Source: Fructidor

### Promising avocado season ahead for Agrexco

The avocado yield is quite high in Israel this season. More than 90,000 tons of fruit is hanging on the trees. Out of it, around 57,000 tons are destined for export. Since many years, Agrexco is the leading and dominant avocado exporter from Israel worldwide, with around 70% of the total export volume.

Agrexco provides top marketing answers with maximum profits to the Israeli growers and innovates trends and tendencies in the export markets abroad. The massive growth in Agrexco export volume – from 19,000 tons a year ago to 40,000 tons in the current season - demands sophisticated marketing programs according to varieties and suppliers. The period of export extends throughout a period of 8 months (October until May).

Each avocado variety is harvested on the optimal timing and promoted with particular designs and marketing plans. Europe is the main market for the Israeli avocado, lead by France (40%) and the United Kingdom (20%). Agrexco's logistic chain is one of the most advanced chains in the world of fresh produce. Avocado is transported by sea only, utilizing Marseille port as main terminal for discharging and distribution all over Europe. Sea transport is done by two state of the art Carmel vessels, with a freight capacity of 8,000 pallets per week.

With time, European markets become bigger and more sophisticated in consumption habits. The rapid emergence of new markets, such as

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*News from around the world  
continued*

Eastern Europe, significantly increase the marketing demands and potential.

Agrexco looks at the avocado business with still great expectations given that the potential is immense and its proximity to the continent. Moreover, the “know how” of Agrexco and Carmel growers in cultivation and marketing is one of the company’s assets which is highly appreciated by its costumers worldwide. Source: Agrexco

**Better quality brings higher prices for California avocados**

With the California avocado harvest currently at peak season, the industry has been shipping anywhere from 8 million to 10 million pounds of avocados a week, according to Guy Witney, director of industry affairs for the California Avocado Commission.

In addition, Mexico has been sending between 7 million and 11 million pounds of avocados a week to the U.S. marketplace.

Aggregate volume for the two sources has been “between 17 [million] and 21 million pounds of fruit on the market every week,” Mr. Witney said. That is comparable to the volume of avocados that moved into the market each week during the same period last year.

And yet prices this year are substantially higher, he said, “about 50 percent higher” than during the same weeks last year. Mr. Witney believes that what is making the difference is the improved quality of the California fruit this year.

Last year, California avocado groves experienced considerable external cosmetic damage to the fruit caused by a pest called avocado thrips. As a result, “we had a tremendous volume of fruit” that had to be packed in a No. 2 box” and sold for a lower price. “A 25-pound box of [second grade] fruit was going for as low as \$6 a box for foodservice, which is less than it costs to pick and pack the fruit,” he said.

The prevalence of that low-priced fruit in the marketplace dragged down the overall market.

This year, “we have had far less avocado thrips pressure on the fruit,” and because of the better quality, “we are seeing a much more stable price platform,” Mr. Witney said. “We are seeing around 20 million pounds a week” in the market, “just as we did last year at the same time, but much stronger prices.”

While “I wouldn’t say it is a fantastic season,” he continued, “there is certainly more optimism out there than there was this time last year.” Yet there are some major concerns facing the industry -- two relating to water and one relating to yet another pest.

Most major avocado growers rely heavily upon water from the Metropolitan Water District, much of it delivered through a state water project from the Sacramento River Delta in Northern California.

In late May, the state implemented a temporary shutdown of pumps in the Delta that pump water into the state project to protect an endangered species of fish, the Delta Smelt, that had been getting into the pump intakes. The pumps supply water to 25 million Californians,

# Grower Member Application Form

## Avocados Australia Limited

ACN 105 853 807

For Associate and Affiliate membership application forms please go to [www.avocado.org.au](http://www.avocado.org.au) or call 07 3391 2344

### Member Details

Business name and/or trading name: \_\_\_\_\_

ABN: \_\_\_\_\_

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: \_\_\_\_\_

## Privacy Options

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](http://www.avocado.org.au)** or call on **07 3391 2344**



## News from Around the World

### continued

two-thirds of them including avocado growers in Southern California. The Delta pumping plant also provides water to farmers in the Central Valley.

While water users have not been affected yet because there are some water reserves from which to draw, unless the problem is quickly resolved, the potential impact is a matter of great concern, he said.

Another concern is an ongoing drought. Last winter, avocado groves received only a fraction of normal rainfall, and there has been virtually no rainfall since, which could lead to water shortages as early as this coming winter if the drought continues. Source: The Produce News

## South Africa avocado crop damaged by frost

The South African Avocado Growers' Association (SAAGA) has revised crop estimates for this season downwards following heavy frosts three weeks ago. SAAGA has been assessing the effects of frosts this week and last week, and has calculated that export volumes are likely to be down by between 500,000 and one million cartons.

"At the beginning of the season we forecast an export crop of 9.5m cartons," said Derek Donkin of SAAGA. "But there were some orchards affected by the frost and we have also had a strong local market in the early season so some of the green-skinned fruit has stayed at home."

He said the frost mainly affected Sout Pansberg, Tzaneen and Nelspruit. "The Hazyview/Kiepersol area where a large proportion of the export crop comes from, has not been affected by the frosts and some orchards had already been picked before the cold snap," he said. "We estimate the total now will be 8.5m to 9m cartons."

But one exporter calculated that 20-30 per cent of the crop had been lost with a lot of fruit dropping of trees in the middle of the Hass season and problems with internal blackening. "There will be problems for anyone reliant on fruit just from the higher areas as they were hit quite badly," he said.

SAAGA has not evaluated what proportion of the fruit lost to the frosts is of the variety favoured by the UK, Hass. "The UK is most often considered our premium market, so exporters are most likely to fulfil those programmes," said Donkin. "Maybe there will be less going to other markets to keep the UK market supplied."

SAAGA will promote its product heavily in the UK at the height of the season with radio and print-media campaigns as well as in-store activities that will also involve importers and pre-packers.

Source: Freshinfo

## Frost fear for Chile's Hass crop

The Chilean Hass Avocado Association is looking into the effects on crops of freezing conditions that have swept southern South America. "We had three nights of frost last week, which can affect the avocado crop," said association president Adolfo Ochagavía. "However, it always takes some time to assess any damage accurately and we will have a much clearer idea of the effects three weeks from now."

Source: Fructidor

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