

AFFCO Well Informed Apple and Pear Supply Chain Initiative

Andrew Dick
Australian Fresh Fruit
Company Pty Ltd

Project Number: AP05018

AP05018

This report is published by Horticulture Australia Ltd to pass on information concerning horticultural research and development undertaken for the apple and pear industry.

The research contained in this report was funded by Horticulture Australia Ltd with the financial support of Australian Fresh Fruit Company Pty Ltd, AFFCO and the apple and pear industry.

All expressions of opinion are not to be regarded as expressing the opinion of Horticulture Australia Ltd or any authority of the Australian Government.

The Company and the Australian Government accept no responsibility for any of the opinions or the accuracy of the information contained in this report and readers should rely upon their own enquiries in making decisions concerning their own interests.

ISBN 0 7341 1554 7

Published and distributed by:

Horticultural Australia Ltd

Level 1

50 Carrington Street

Sydney NSW 2000

Telephone: (02) 8295 2300

Fax: (02) 8295 2399

E-Mail: horticulture@horticulture.com.au

© Copyright 2007



Know-how for Horticulture™

FINAL REPORT

PREPARED FOR HORTICULTURE AUSTRALIA LTD

AFFCO Apple and Pear Well Informed Grower Initiative

APO5018

Author: Andrew Dick
General Manager
Australian Fresh Fruit Company

**Research
Provider:** John Baker
Chief Executive
Produce Marketing Australia

Table of Contents

Purpose	3
Media Summary	4
Introduction	6
Technology Transfer	7
Discussion	12
Recommendations	14

Appendices

Teleconference reports:

- Apples
- Pears
- Gold grower
- International update

Retail report

Competitive Market & Weekly Market report

Daily Gala & Pear reports

Apple & Pear communication to retailers

Enclosure

Australian Apple and Pear Industry Handbook

HAL Project Number: APO5018

Project Leader:

Andrew Dick
General Manager
Australian Fresh Fruit Company
PO Box 363, Gisborne, Vic 3437
Phone: (03) 5420 7444, Fax: (03) 5420 7447
Email: andrewd@affco.com.au

John Baker
Chief Executive
Produce Marketing Australia
PO Box 80
Croydon NSW 2132
Ph: 02 9744 6366 Fax: 02 9744 8722
Email: john@producemarketing.com.au

Purpose of the report

This report documents the purpose and outcomes of the AFFCO Well Informed Grower Project, viz:

Collect analyse, collate and disseminate information to apple and pear growers, packers, marketers and the wider industry, resulting in:

1. Better coordination between domestic stock availability and movement, crop forecasts (volume and quality) and marketing and promotion activities
2. New domestic and export windows and opportunities identified, communicated and actioned
3. Ability to develop seasonal marketing plans with marketers, leading to more consistent pricing and improved returns for growers.
4. Improved category management
5. Maximizing the benefits of R&D investment

Acknowledgment

On behalf of AFFCO, we would like to thank Horticulture Australia, Apple & Pear Australia Limited, John & Mark Baker from Produce Marketing Australia and the growers, packers and marketer members for their support of this project. The project has been a success because of the strong teamwork of many stakeholders and administrative back-up of Keryn Allan at AFFCO.

All the above have contributed willingly to this project, which has resulted in its success. AFFCO acknowledges the support of the Apple and Pear IAC through funding support via apple and pear levy funds, in addition to matched Commonwealth R&D funds.

Date of the report

5 June 2007

Disclaimer:

Any recommendations contained in this publication do not necessarily represent current HAL Limited policy. No person should act on the basis of the contents of this publication, whether as to matters of fact or opinion or other content, without first obtaining specific, independent professional advice in respect of the matters set out in this publication.

MEDIA SUMMARY

Good Information Pays

The AFFCO Well Informed Grower project has provided significant financial advantages over the past three years to apple and pear growers through better information exchange, analysis and communication.

Expanded participation has also produced added benefits, adding to the initial group of over 20 apple grower-packer-marketers, set up in 2004.

In 2006 pear growers and packers established their own information network. A separate group of apple growers across Australia was also established in 2006. Membership of all three groups within the project continues to strengthen.

The aim of the project is to contribute to improved profitability by balancing the power of the market with better information, analysis and communication for apple and pear growers and marketers.

The motivation for the project arose from apple and pear growers, packers and marketers having insufficient knowledge about the market, compared with buyers, to the point where returns were being eroded.

The fundamental driver for the project has been the information needs of growers, so that the project can contribute to grower profitability. Growers around Australia have identified their information needs and priorities, then provided regular feedback on how well the project was meeting those needs.

Benefits to participants and the wider industry have included:

- Better coordination between apple and pear supply and demand, crop forecasts (volume and quality) and marketing and promotion activities
- Regular and accurate forecasting of the crops as each season unfolded, resulting in a planned approach to domestic marketing and a lack of panic selling
- New domestic and export windows and opportunities identified, communicated and actioned
- Ability to develop seasonal marketing plans with marketers, leading to more consistent pricing and improved returns for growers.
- Improved category management
- Maximising the benefits of R&D investment
- A more accurate picture of national cool store stocks, through AFFCO project members in WA, representing well over half the State's production, volunteering to participate from 2006 and making the APAL collated figures truly national for the first time.
- Annual production of the Australian Apple and Pear Industry Handbook, initiated through the project. The Handbook is a ready-reference of plantings, production and marketing in Australia and internationally. Apple and pear growers say the publication provides an excellent source of data for farm and business planning.
- Knowing current and likely competition from other domestic and imported fruits, through weekly competitive products reports initiated by the project, plus the networks of the project team

One of the major gaps still to be addressed is to improve the accuracy of apple and pear crop forecasts. Australia lags well behind most other countries in the accuracy and timeliness of its crop forecasts.

A key goal over the next three years has to be to achieve better coordination between domestic stock availability and movement, crop forecasts (volume and quality) and marketing and promotion activities.

The AFFCO Well Informed Grower project is jointly funded by participating members, apple and pear industry levies and matched by HAL through R&D funding.

INTRODUCTION

The Australian apple and pear industry is currently faced with multiple challenges and opportunities which continue to provide ongoing relevance and motivation for the coming together of a key group of apple and pear grower, packer, marketers who desire to share information as a means of improving grower profitability.

The key drivers of the original “well informed” initiative still hold true today and will gain even greater significance given the very real threat of apple imports and poor export development in both the apple and pear sectors.

The original driver of the project and key industry impediment/ opportunity was that the apple and pear marketing chain, in particular growers and grower, packer, marketers, was:

1. Devoid of good information
2. Did not have the trust to share information
3. Was inhibited from sharing because of the wide difference in geographic location
4. Was becoming more vulnerable to a lack of information because of the move to central buying by the major Australian supermarkets

In addition the industry could benefit from linkages formed as a result of an information network which could better address key issues, link into other promotional and R&D projects, and respond to various challenges more positively.

It is pleasing to report that through this project many of the above impediments have been addressed with a regular sharing of high level of information and reporting. This is critical given the estimated gross farmgate value of \$500M and the fact that the overall figure and associated margins are in decline. However, as identified in this report trust and information sharing do not come quickly and the level of information exchange needs to occur even more in the future.

This project, in its formation and evolution, was about creating well informed growers of apples and pears and as a result improving their profitability and viability. It had as its uniqueness the fact that a core group of major apple and pear grower / packer / marketers have been prepared to share information for their own and industry benefit.

This report explains in detail how the information has been sourced and communicated and provides recommendations on future activities which can build on the success of this project. It is essential this coordination continues and be supported, as it is in the interests of all apple and pear growers to have a high level of information exchange and transparency.

TECHNOLOGY TRANSFER

First, what have been the industry priorities? In summary, the top information priorities identified by growers at the commencement of the apple (2004) and pear (2006) phases of the project were:

Apple priorities	Pear priorities
<ul style="list-style-type: none">▪ Crop predictions for each region▪ Stock figures▪ Plantings and production in each state▪ International production and export intentions▪ Pricing and volumes and▪ Competitive product reports	<ul style="list-style-type: none">▪ Cool Store Stocks▪ Crop (quality and volume) and Sales Forecasting▪ Pricing and volumes▪ Domestic & Export Opportunities▪ New plantings▪ International developments▪ Grower Technical Exchange

These priorities were identified by a process involving:

1. Identifying potential information areas important to apple and pear growers
2. Surveying growers through the AFFCO project members and growers generally at meetings held in all major apple and pear production regions. The survey asked growers to identify the information of most importance to them and its priority
3. Collating all responses to identify the main information needs.

Priorities have been reviewed annually with participants and other industry representatives through regional meetings to ensure project activities remained focused on the most important issues.

Second, how has the information been sourced, analysed, and disseminated?

1. Identifying where the information could be sourced. In some instances, this was available from existing sources, such as APAL, HAL, ABS, etc. In other cases it required a combination of one or more alternative sources including:
 - Project members via fortnightly or monthly teleconferences, confidential supply of sales and marketing data etc
 - Commissioned reports, such as the weekly Competitive Products report from Sydney Markets.
2. Collating, analysing and distributing the information in a form and time that best suited participants. Participants were asked how they wanted the information presented, how often and by what means.
 - As a result, a schedule of regular email communication was agreed and implemented with members
 - For other growers and support sectors, a goal was established and achieved of visiting all major regions at least annually. In most cases regions were visited at least twice
 - Over each year of the project, a presentation has been made to the annual industry Conference, such is the interest in and importance of the project
 - In addition, articles related to project activities and outcomes were provided on a regular basis to industry journals, such as "Tree Fruit" and "Australian Fruit Grower"

Third, the networks with growers, through regular contact with members of the project and visits to production regions, provided a ready-made structure for regular review and feedback on the project, including:

1. Regularly reviewing the effectiveness of the project and
2. Regularly reviewing the information needs and priorities of the industry.

Communications/Extension Activities

Communication and extension activities have been undertaken with three different sectors within the horticulture industry:

a. Industry participants

With the initial grower/packer/marketer group, activities have included:

- Weekly competitive products reports
- Weekly wholesale market reports
- Weekly retail reports
- Fortnightly teleconferences
- One-on-one contact with participants
- Fortnightly written regional roundups, sourced from the teleconferences and one-on-one communication, and incorporating stocks, sales and price data, as well as seasonal/crop conditions
- Regional visits

For the Pear group, more face-to-face meetings have been undertaken (with members from other regions on teleconferences), reflecting the concentrated nature of the industry in the Victorian Goulburn Valley. Because the pear group also identified grower technical exchange as a priority, specifically to maximise marketable yields from older pear orchards, grower field days, workshops and demonstrations have been held on a range of topics including tree nutrition, tree training, root pruning, and pest and disease management. Other communication has included:

- Weekly competitive products reports
- Weekly wholesale market reports
- Weekly retail reports
- Weekly (in February when the Williams harvest was in full swing) then fortnightly teleconferences
- One-on-one contact with participants
- Weekly then fortnightly written regional roundups, sourced from the teleconferences and one-on-one communication, and incorporating stocks, sales and price data, as well as seasonal/crop conditions
- Regional visits

A new apple group, comprising growers who do not market their own fruit, was established in early 2006. Their main interests relate to the stocks and sales situation. As a result the main communication has been:

- Weekly competitive products reports
- Weekly wholesale market reports
- Weekly retail reports
- Monthly teleconferences and written regional roundups
- Regional visits

b. Apple and Pear Industry

Regional meetings have been undertaken in most of the main apple and pear growing regions, including Adelaide Hills, Southern Victoria, Goulburn Valley, Huon Valley, Orange and Stanthorpe.

Articles have been contributed on a regular basis to industry journals. "Tree Fruit" the journal of the apple and pear industry regularly featured articles on the activities and outcomes of the Well Informed Grower project.

Presentations have also been made to industry gatherings such as the Apple Industry Workshop in Shepparton in June, attended by over 100 people and featuring testimonials from project participants, as well as the official apple and pear Conferences in August 2005 and 2006.

For the three groups detailed in section a. above, as well as for apple and pear growers generally, an annual "Australian Apple & Pear Industry Handbook" has been produced. The publication has been available to all growers who received copies of "Tree Fruit" magazine (the industry publication until the end of 2006). The purpose of the publication was to satisfy one of the identified priorities by consolidating domestic and international planting, production and marketing information in one easy-to-read publication. Additionally, pre-season meetings were held in October 2005 and September 2006.

c. Horticulture Industry

As a result of interest from the wider horticulture industry in the results being achieved by apple and pear participants, presentations have been made to representatives of the stonefruit, cherry, passionfruit and carrot industries. The project was also used as an innovative case study by HAL at its Supply Chain Workshop in June.

Evaluation and measurement of outcomes - impact and adoption

The outstanding success of transfer of information within the project can be attributed to a combination of:

1. Confirming the importance of the project. i.e. **relevance to their business**
2. Identifying the specific needs and priorities of growers i.e. **the specific information was what they needed**
3. Identifying where the information resided i.e. **being innovative about potential sources**
4. Identifying the best means of packaging and disseminating the information i.e. **communication**
5. Reviewing the effectiveness of delivery of information i.e. **performance**
6. Involving growers at all steps in the process. i.e. **Giving them a feeling of ownership of the project**

This project has been given the highest priority by the AFFCO Board. The monthly review of the project by Directors has been rigorous.

Initial priorities within the project were identified through surveys with participants and at regional open meetings held in all major production districts. Evaluation of outcomes and benefits has been undertaken on a regular basis with participants and at regional grower meetings, culminating in an in-depth review in mid 2006. A review meeting involved 17 participants from the apple grower/packer/ marketer, pear grower/packer /marketer and apple grower groups, as well as APAL representatives.

In summary, results of the review were:

- The information available through the project is far better, compared with before the project started
- There have been benefits in seasonal marketing planning and long-term planning
- Fortnightly hook-ups in particular have been very useful, especially for the regional round-up. From a grower's perspective it is good to understand what is happening beyond the farm gate, plus what is happening over the season
- The information available contributes to more informed selling, providing a lot of benefit.

Typical of the feedback from participants has included:

- *"The project has provided me with new information about what is happening in my eastern states markets when I am on the other side of the country. The information has been invaluable."*
- *"The teleconferences have enabled us to identify interstate markets we were not servicing, filling gaps in local supply and increasing returns by up to \$3 per carton."*
- *"I should have taken more notice and action when the high levels of Granny Smith stocks were graphed and communicated and discussed on the teleconference in early November."*

Strengths and weaknesses identified by the review included:

Project Strengths

- The level of ongoing support of the teleconferences has been an outstanding success, which has involved a fortnightly commitment for all participants
- The teleconferences and their relevance are backed up by the integrity of the data behind it and that is where the combination of data sources and reports has been such a key strength
- High and consistent level of information transfer

Project Weaknesses

- There was a question about the accuracy of some information
- There was a lack of grower/packer/market participation by key businesses in some districts
- Weekly wholesale market reports did not reflect prices for volume sales

Additional comment at the mid 2006 review was also made about the need to engage with the retail sector. This potential initiative required handling with sensitivity, given the basis of the project was to balance the information available to buyers with that of suppliers.

Nonetheless, it was seen as important to communicate with retailers on matters of interest and importance to all sectors. This included information on seasonal and production developments.

As a result, on two occasions in the early stages of the 2007 apple and pear harvest it was deemed important to advise retailers about likely stock levels. This resulted in material being drafted by AFFCO and jointly distributed by APAL and AFFCO to representatives of both national supermarket chains, as well as representatives for the banner group supermarkets such as IGA.

In early 2007, AFFCO undertook additional industry surveys, through meetings and regional visits with participants of the apple grower/packer/marketer and pear groups. Results of these surveys were:

Scale Definition:	Low	1	2	3	4	5
	Apple Grower/Packer/Marketers				Pears	
Overall rating of the program		3.86			4.00	
Value of programme content to your business		3.71			3.83	
Value of Individual Activities:						
Fortnightly teleconferences		4.33			4.00	
Teleconference notes		4.25			4.40	
Regional Visits		3.66			4.00	
Early season face-to-face meetings/visits		3.80			4.66	
One-on-one contact		3.25			3.75	
Australian updates		3.57			4.00	
International updates		3.50			3.00	
Monthly cool store stocks (with APAL)		4.28			4.60	
Weekly competitive products reports		4.00			4.60	
Weekly retail reports (Sydney & Melbourne)		4.28			4.40	
Weekly wholesale market prices		4.25			4.60	
Articles in 'Tree Fruit'/'Aust Fruit Grower'		4.14				
Annual Apple & Pear Industry Handbook		3.50			3.80	
Grower Technical exchange		3.33			4.00	
Rating of future activities required:						
Seasonal planning information (vol/size profiles)		4.75			4.60	
Two-way dialogue with retailers		4.00			4.60	

Return on Investment

Growers representing approximately 2/3 of Australian apple production (by volume) contribute and have ready access to information provided by the Well Informed Grower project. This is equivalent to 10 million cartons of fresh fruit annually in a production off-year.

Growers report they have been able to achieve increased returns of up to \$4 per carton through having better market knowledge, based on information provided by the project. At the same time, it is accepted that participants use the information to varying levels and some may not have benefited to the same extent. For every 10 cents per carton increase in return, another \$1 million is returned to participating growers. This is equivalent to a return on investment of apple and pear levies of 30:1. While the total increase in value from the project is not available, it is clearly more than 10 cents per carton, meaning the ROI is greater than 30:1.

Pears

Since the pear component of the project was launched in 2006, growers representing at least 75% of Australian pear production (by volume) contribute and have ready access to information provided by the project. This is equivalent to around 4.5 million 12kg carton equivalents of fresh fruit annually. Again grower members of the project have reported achieving increased returns of \$2 or more per carton, through information gained via the project. For every 10 cents per carton increase in grower returns (or \$450,000 in total for participating growers), a return on levy investment of at least 30: 1 is also achieved.

DISCUSSION

The key outcomes of this project are:

- Ongoing transparent platform of sharing of information developed for the apple and pear industry
- This platform provided a unique package of information to the industry and embraces an influential section of the growing supply chain

The key benefits of the project are:

- Increased profitability
- Improved bargaining position for apple and pear groups
- Better industry marketing and planning information as a result of the wide distribution of information through various means of communication

At the same time as participants have expressed their satisfaction with the activities and outcomes of the project to date, they have also indicated the need for additional activities and improvements to existing activities, to include:

1) Redefine the information needs

- Segregate and identify the different information needs of:
 - Growers / packers / marketers
 - retailers (and wholesalers)
- Redefine the objectives for each group e.g. achieving profitable sales by growers on the volume lines available.

2) Develop and share seasonal planning information, via

- Regional round ups in the lead up to harvest
- Developing tools for early season (December) measurement of likely crop load and size profiles
- Developing more precision on stock information
 - Volumes in store and profiles (varieties, sizes etc)
 - Phasing of sales (plans)
 - Likely pack outs over the season (and tools to measure)
 - Level of Smartfresh (Gala and other varieties) stocks
- Sharing the information
 - Growers/packers/marketers need to cooperate, not compete
 - Identify specific opportunities with retailers, pre-packers, etc

3) Develop good two-way dialogue with supermarkets:

- Ask them what information that the project can provide, would be useful to them e.g. seasonal situation
- Build supermarket confidence and trust for them to give feedback. Talk to them in a business/financial language so they understand the financial implications of their product specifications and other requirements
- Growers need specific information from retailers - product, packaging, marketing, etc
- Marketing needs to be coordinated. The industry needs to know the season marketing programs of supermarkets for cooperative improvement e.g. more effective promotions through coordinated timing
- Involve/expose supermarkets to on-farm activities, including financials.

4) Other Important Ideas:

- Planting and tree removal information is important, because of the impact on prices of volumes of each variety available
- Interview major non-participants to determine why they are not involved and what is needed to encourage their participation
- Ensure there is no duplication with APAL or HAL
- Determine the impact on Australian growers of fresh apple imports. Identify when fruit is likely to arrive from New Zealand, China and USA, seasonality, varieties and volumes.
- Pear-specific ideas
 - Maintain the enthusiasm of the pear group
 - Continue the high standard of the Pear Technical Exchange program
 - Assess the need for more marketers in the pear group
- Develop new market segments (eg IGA, FoodWorks, foodservice)
- Update Apple Industry Handbook and develop Pear version

RECOMMENDATIONS

The goal of the AFFCO Well Informed Grower (WIG) project has been to maximise grower returns through the provision of better information, which leads to better decision making. Significant achievements have been recorded by the project in assisting growers to maximize their returns through better information. However, the need for better information is still a “work-in-progress” and more remains to be undertaken and achieved.

One of the key industry outcomes for the future has to achieve better coordination between domestic stock availability and movement, production forecasts (volume and quality) and marketing and promotion activities. Utilising the expertise of the WIG project team and members to achieve this outcome is recommended. The issues in detail are:

a. Stock Availability and Movement

Through joint efforts by APAL and AFFCO in 2006, for the first time Western Australia was included in the monthly apple and pear cool store stock information, resulting in a truly national picture of stocks and movements. Prior to that time the national influence of the significant Granny Smith and Pink Lady™ crops in WA was difficult to estimate. Western Australia was able to be included through the efforts of AFFCO in obtaining the support of major grower, packer, marketers who are project participants and who represent around 70% of the fruit marketed.

The WIG project has been able to provide all participants and the wider industry with an interpretation and analysis of the improved information. For example, the significant Granny Smith stock levels in both WA and Victoria were brought to the industry's attention as early as October 2006.

As 2006 was the first year of the national program, further refinements will need to be developed by the project in the coming seasons, in consultation with APAL, to ensure the benefits of the initiative are maximised i.e. growers are able to use the information to make decisions that result in improved returns.

b. Crop Forecasts

Another major gap still to be addressed is the need to improve the accuracy of production forecasts. Australia lags well behind most other apple and pear producing countries in the accuracy and timeliness of its crop forecasts, as instanced by the information shared at WAPA meetings, to which the project has had an input.

Already, the project has been able to provide more accurate information about overall production forecasts and pack-outs. This has been achieved through information being obtained from a range of sources, including WIG members (separate grower/packer/marketer and grower groups) in all major production districts, regional visits, networks with supplier/category managers, retail contacts, etc.

A case in point is the variable production and quality of both the apple and pear crops in 2007. In May 2007 the project initiated a new step, with a survey of apple members to determine likely pack-outs so that fruit available for fresh marketing could be estimated through combining this data with the monthly Cool Store Stock figures. This is at an early stage and significant refinements will be required, in an area that is fundamental to successful marketing. In addition, the information obtained from the WIG project has been, and will continue to be,

important for APAL and HAL as an input to scheduling domestic promotion activities.

c. Marketing

Profitability from domestic fresh marketing of apples and pears is influenced largely by a combination of:

1. Apples and pears available for fresh marketing. Not only are production, pack-out and stock levels important, but also fruit destined for export. With the rapid decline in exports this means more fruit needs to be marketed domestically or export markets need to be reinvigorated;
2. Competition from other domestic fruits; and
3. Competition from imported fresh fruits.

Apple and pear growers, packers and marketers need to be increasingly aware not only of domestic stocks and production forecasts; they also need to be advised of developments and implications of developments with competitive products from domestic and international sources. The resources available through the WIG project provide one of the best avenues for this information to be sourced, assessed and communicated to the industry.

For example, there is increasing production for a range of domestically produced products that impact either directly or indirectly on apple and pear sales. In the absence of the WIG project, this information would not be forthcoming, for example:

- Supply forecasts for bananas, a direct competitor, after the industry lost most of its production in March 2006
- Expansion of the table grape industry, particularly through corporate investment, and volumes likely to be available at the commencement of the apple and pear season
- Volumes and seasonality of stonefruit supplies, with the season being progressively extended, at the expense of apples and pears
- Impact of stonefruit and grapes as to when apples and pears are repositioned more prominently on supermarket shelves
- Information on other competitive products, sourced from Sydney Markets, is one of the most important reports according to WIG participants

In relation to imports, there are a range of developments which the project is well positioned to analyse and report, including:

- Likely impact of New Zealand apples, with some form of access now approved. Factors to be monitored and reported include policies of major retailers in relation to imports varietal mix available, possible price profiles, seasonality of supply, etc
- Changes to the California table grape protocol which will result in a higher proportion of fruit being transported by sea (at lower prices) and possibly affecting apple and pear sales from July-November
- Expansion of the number of pear varieties being imported from China (e.g. Fragrant pears is the latest) at the end of the Australian season, which has often been the time of best returns
- Progress on access for Washington apple access and likely implications. For instance, the extensive use of Smartfresh has revitalized the eating quality of Washington apples, which could create pressure on both the back and front ends of the domestic supply season, if and when shipments commence

APPENDICES

Section 4: AFFCO Well Informed Grower Project

Apple Teleconference 29 May 2007

1. Regional Update

- Harvest is finished or very close in all districts
- There is a shortage at present of good quality Pink Lady. Flexibility by both supermarket chains has been most helpful in moving Pink Lady fruit that would not normally meet specifications.
- Demand has slowed a little in the past few weeks, but the market is still very good
- Pack out estimates, based on responses to the form accompanying this report, will be used in conjunction with the May Cool Store Stock figures to compile a picture of the volume of fruit available for fresh marketing for the balance of the season.

Stanthorpe:

- Apart from some Pink Lady remaining to be picked, the harvest season is finished.
- Close to record stocks are in store overall.
 - Gala c.a. stores have been opened; stocks are down a little on normal
 - Pink Lady, Red Delicious and Granny Smith stock levels are very good, as is quality. It is likely to be about three weeks before these stores are opened
- Overall the situation is good, with good stock movement, even though sales have slowed a little in the past fortnight.

Orange:

- Good rains in the past month have been welcome
- Gala stocks are finishing this week
- Red Delicious are selling well
- Fuji c.a. will start within 2 weeks and Pink Lady in late June
- Pack outs are generally good
- Markets are very good
- Stocks will run down quicker than normal, because it is unclear how well fruit will store after the drought and most are not taking the risk. At last two thirds of the fruit will be marketed by the end of September, with some Red Delicious and Pink Lady running through to Christmas

Batlow:

- Because of the lower crop, packing is intermittent.

Goulburn Valley:

- Harvest is finished other than for a few Sundowners and Lady Williams
- Most Pink Lady will be sold in the short term, because of quality. The cracked fruit is moving at a price. Best lines are \$40 to \$45, down to \$22 for poorer lines. Those with good Pink Lady will do well later in the season
- Granny Smith crops were reasonable but there is a question over likely pack-outs, because of Western Flower Thrip damage last spring. There are some very good lines of fruit
- Sundowner quality is generally very good, with a good crop

Southern Victoria:

- Crop levels are about the same as 2005 (the last 'off' year), but pack-outs will be lower, especially Pink Lady. There are some very good lines of Pink Lady in store.
- Hail has also had an impact
- Overall, prices are satisfactory
- Granny Smith and Fuji are in very good demand and other varieties are moving
- Golden Delicious demand is strong in the markets
- Wholesale markets have eased a little for other varieties.

Tasmania:

- North
 - 100mm has been received for the month
 - Harvest finished last week, one of the latest finishes on record
 - Pink Lady was not so affected by the spring frost and crop is a record
 - Sundowner is similar
 - Fuji volumes are okay for striped strains, but down for block strains. Some fruit is going to Taiwan
 - Golden Delicious will finish early because of low pack-outs
 - Most varieties are bringing \$28 to \$32 in supermarkets
- South
 - Good rains have been received
 - Harvest has finished
 - Growers shared experiences at last weeks fruit conference and felt the crop was up a little on earlier expectations – probably down to 60% of normal, rather than the earlier estimate of 50%

Adelaide Hills:

- Harvest finished mid May and most are happy with the crop
- The local market has been flat for the past few weeks
- Fuji have been selling well, with the best stocks still to be sold
- Air stored Pink Lady will last another 3 to 4 weeks; sales are slowing
- Some are about to open c.a. stores across all varieties

Western Australia:

- Harvest is complete
- Local sales are okay and prices are satisfactory
- Demand from eastern states has been excellent for Gala, Fuji, Pink Lady and Granny Smith. Supplies are now tailing off
- Overall the crop is down, through a combination of the heat wave in March and crops not picking out to expectations

2. APAL report

Tony Russell APAL provided the following reports:

- a. New Zealand apple access
 - There was a Senate hearing two weeks ago and the Senate seemed to be on side with the industry concerns about BA's assessment
 - If a Senate Inquiry is re-opened it could further delay access for New Zealand
 - A relationship is being developed with AQIS, in relation to the work plan required by New Zealand. Only yesterday, Jenny Gordon of AQIS was escorted on a tour of the Goulburn Valley so she, on behalf of AQIS, could appreciate the concerns and issues for the Australian industry.
- b. Promotions
 - The Woolworths "iPod a Day" competition in May is reported to be very successful, with a lot more fruit moving, especially prepacks
 - In-store sampling is about to commence
 - Additional television advertising was undertaken in Sydney and Melbourne to cover gaps from the early schedule around Easter.

3. Pack out Estimates

Could you please provide an estimate of likely pack-outs on the accompanying form, so that an idea of volumes available for fresh marketing for the balance of the season (and compared with 2006) can be established? These estimates will be combined with the results of the May Cool Store Stock returns to provide you with tools to work out sales and marketing schedules that maximize returns for 2007/08.

Next Meeting: Tuesday 12 June 2007 at Noon (Eastern Summer Time)

Contact:

John or Mark Baker

Phone: 02 9744 6366 Fax: 02 9744 8722

Email: john@producemarketing.com.au or mark@producemarketing.com.au

AFFCO Well Informed Grower Project
Pear Teleconference Update
29 May 2007

1. Regional Roundup

- Williams from the Goulburn Valley will finish this week. Other areas have already finished
- Packham Ripe & Ready programme has extended from Woolworths in NSW and Qld to now include South Australia

Goulburn Valley:

- Williams:
 - Last supplies into Coles will finish this week
- Packhams:
 - Despite all the gloom with overall poor crops and pack-outs, there are some good lines available
 - More fruit is appearing on wholesale markets and this is impacting returns, despite the overall lower crop
 - Prices to supermarkets are \$30 to low \$30s; there is a balance between increasing prices and possible impact on consumer demand
- Josephine:
 - Stocks are finishing
- Bosc:
 - Conventional stocks are still being sold; c.a. are close to being opened for some
 - Fruit is eating very well, but external appearance is not helping sales
 - Prices to supermarkets are in the vicinity \$28 to \$30
- Corella:
 - Stocks are moving well
 - Prices are coming up to 2006 levels at best
 - Colour is an issue this year

South Australia:

- Packhams:
 - Woolworths Ripe & Ready program has started
 - Quality is good
 - Pack-outs are good, but volumes suitable for supermarkets are being impacted because size is an issue
 - Sales in SA are very good
 - “Indian Summer” conditions are a real worry for the 2008 crop as some orchards are budding/almost flowering; pruning is about to start.

- Lemon Bergs:
 - Fruit is selling well and there is not enough fruit left
- Bosc:
 - Demand is excellent
- Corella:
 - Sales are good, but colour is an issue.

2. APAL report

Tony Russell APAL provided the following report on New Zealand apple access:

- There was a Senate hearing two weeks ago and the Senate seemed to be on side with the industry concerns about BA's assessment
- If a Senate Inquiry is re-opened it could further delay access for New Zealand
- A relationship is being developed with AQIS, in relation to the work plan required by New Zealand. Only yesterday, Jenny Gordon of AQIS was escorted on a tour of the Goulburn Valley so she, on behalf of AQIS, could appreciate the concerns and issues for the Australian industry.

Next Meeting: Tuesday 12 June 2007 at 12.30pm (Eastern Summer Time)

Contact:

John or Mark Baker

Phone: 02 9744 6366 Fax: 02 9744 8722

Email: john@producemarketing.com.au or mark@producemarketing.com.au

AFFCO Well Informed Grower Project

Grower Teleconference 5 April 2007

Regional Update

Stanthorpe:

- Overall fruit volumes and quality is good
- Pink Lady has a good crop
- In summary, cool stores will be full by the end of harvest

Orange:

- Production is less than expected
- Gala had a heavy crop but drought stress reduced pack outs
- Jonagold pack outs have been excellent
- Red Delicious and Fuji crops have been very good with good pack outs
Braeburn size, colour and pack outs have been good
- Harvest should be complete in two weeks
- Sales are satisfactory

Batlow:

- As indicated earlier, crops are down
- Although there has been some rain it is still very dry
- Gala and Red Delicious crops are well down. Overall, early varieties are down by up to 40%
- Yields are better on later varieties, with Fuji up on 2006 (which was a lower year), Granny Smith and Braeburn are both good and Pick Lady, which starts next week could be up by 10%
- There is good colour developing and cold weather would be welcome
- Fuji, Red Delicious and Braeburn have a lot of large fruit
- Fruit cracking and birds will reduce some pack outs, especially for Fuji and Pink Lady

Goulburn Valley:

- Although crops are up on last year, they are picking out lighter than expected, plus pack outs will be down
- Weather conditions have been good in the past few weeks
- Calyx cracking will reduce Pink Lady pack outs
- Western Flower Thrip damage will reduce Pink Lady and Granny Smith pack outs
- Pink Lady harvest will start in 10 to 14 days
- Sundowner is looking good and yields will be up on 2006

Southern Victoria:

- Gala crop is up 20%, which is better than expected but size is down. Air stored fruit is finishing
- Red Delicious and Golden Delicious are normal crops

- Fuji crop is up and harvest has just started; pack outs will not be great because of the heat
- Pink Lady looks good on the trees

Tasmania:

- South:
 - There is good autumn weather, good colour and a lack of fruit
 - Growers south of Huonville (who represent about 15% of the state's production) report crops up by 150% on last year.
 - Gala and Golden Delicious are finished harvest, with Red Delicious and Jonagold started
- North:
 - The harvest will be in full swing for the next few weeks
 - Gala and Jonagold are better than expected, although Gala pack outs will be down, along with Red Delicious
 - Fuji has a large crop, but size is variable and russet from frost will reduce pack outs
 - Pink Lady harvest will start next week; colour is good and good volumes are expected

South Australia

- Production is up overall by 20 to 30% on last year; there is a shortage of storage capacity
- Autumn weather conditions have been good for colour
- Bird damage is a problem this year
- Gala: a large proportion went into c.a. which is about to start
- Fuji is finishing and finish is excellent
- Pink Lady colour is developing well; harvest will start next week; pack outs should be good

South West WA

- Heat in March has resulted in losses state wide of between 20 and 30%
- State production will be 70 to 80% of a normal crop
- There are questions about the stage life of fruit, as a result of the heat
- Pink Lady crops pruned early then treated with Regalis seem to be less affected by the heat
- Granny Smith and Pink Lady both have significant damage and loss
- Gala are achieving good prices for good quality; the balance is selling at low prices
- Pink Lady harvest will start in 2 weeks
- Fruit size is up on last year
- Balance of 2006 Granny Smith and Sundowner have been dumped

Next Meeting: Friday 4th May at 12.30pm Eastern Standard Time

Section 10. International Update

7th March 2007

Trans-Tasman Apple Case to WTO?

New Zealand apple growers want Australia taken to the WTO over the rules being set for exports across the Tasman. Pipfruit New Zealand chairman Ian Palmer says rejection of three appeals by Australian growers could mean the first exports by May next year but with interpretation of the rules still to be agreed on, costs could still form a non-tariff barrier. If that proved to be the case, the WTO might need to be called in.

But growers say Palmer is too optimistic and the government should start preparing a case now. Access Action Group spokesman Phil Alison said Australia had tried outright refusal, then infinite delay, and had now come up with export protocols which would add a minimum of NZ\$9 - \$27 carton of apples just to break even.

(Dominion Post/Agbrief)

Week Comm:	Safeway Sunbury VIC		Coles Sunbury VIC		Independent Sunbury VIC	
	Price	Notes/pre pack		Notes/pre pack	Price	Notes/pre pack
Apples						
Gala	4.98	4.98/1.5kg	4.98	4.98/1.5kg	2.99 sm	4.69 larger
Jonathan					3.99	
Red Delicious	4.98	4.98/1.5kg, 2.98/500gm 6 pack	4.98	4.98/1.5kg YLC	3.99	
Granny Smith	4.98	4.98/1.5kg, 2.98/6 pack inc prize	4.98	4.98/1.5kg YLC	3.69	1.69 hatbin
Fuji	4.98		4.98		5.69	
Golden Delicious	4.98	3.98/1.5kg	4.98	4.98/1.5kg YLC	4.69	
Pink Lady	3.42	4.78/1kg punnet	3.42**	2.98/1kg SB	5.99	1.99 hatbin
Sundowner						
Jonagold	3.42		4.98			
Braeburn						
Other	4.98	Camec	4.98	Firmgold, Cameo		Bagged 3.99/2kg
Pears						
Williams			4.98			
Packham	2.83 RnR	4.96/1.5kg			1.69	hatbin & shelf
Bosc	2.83		4.98		3.69	
Red Sensation						
Corella	6.98		6.98		6.99	
Josephine	2.83					
Other	4.96	D'Anjou			3.99	Howell
Nashi	NIS		4.98	Green	5.99	
Other Snack Fruits						
Cherries	8.94	500gms	14.98		NIS	
Plums						
Mango (each)	3.97		2.48			
Bananas	3.47		4.98	3.78/6 pack SB	3.89	
Kiwifruit	58cgr	88c gold loose	48c gr	4.98 Gold punnet, 3.98 green punnet	3 for \$2	2.99/8 pack
Mandarin	4.98	Imperial	4.98	Imperial	2.99 sm	4.99 large Imperial
Oranges (Navel)	4.98	3.98/3kg	3.98	4.98/2kg, 3.98/2.5kg SB	4.99	1.49 hatbin / 4.99/3kgs
Grapes - White			3.98	Ohanez	NIS	
Grapes - Black						
Grapes - Red	4.98		4.98		6.99	
Avocados (ea)						
Hass	1.24	3.96/4 pack	1.24		1.29	3 for \$3
Shepard						
Other						
General Comments	Org apples GS/Gala 5.98/1kg bag, Valencia 3.99/2kg **Coles adv PL in cat @ 3.71, but reduced to match Safeway					
	Store Level Special		Catalogue Special		Imported product	

All prices are in \$/kg unless otherwise stated

Week Comm:7 May 2007	Woolworths Sydney		Coles Sydney		Independent Sydney	
	Price	Notes/pre pack		Notes/pre pack	Price	Notes/pre pack
Apples						
Gala	4.98		3.98	\$2.65 1kg PP; \$5.98 1.5kg prepack	4.99	
Jonathan						
Red Delicious	2.95	\$5.97 1.5kg PP	4.98		4.99	
Granny Smith		\$5.97 1.5kg PP	2.98		4.99	
Fuji	4.98	\$5.97 1.5kg PP	5.98		7.99	
Golden Delicious	4.98		4.98		4.99	
Pink Lady	4.97		4.98	\$5.98 1.5kg prepack	5.99	
Sundowner						
Jonagold	4.98		4.98			
Braeburn					3.99	
Other	4.97	Camec	4.98	Bonza	3.99	Bonza
Pears						
Williams						
Packham	3.98		3.98		3.99	
Bosc	3.98		3.98		4.99	
Red Sensation						
Corella			6.98		5.99	
Josephine	3.98					
Other	6.98	Red d'Anjou				
Nashi	5.97		5.98		5.99	
Other Snack Fruits						
Cherries	19.98		19.98		19.99	
Plums						
Mango			2.98			
Bananas	3.48		3.49		3.99	
Kiwifruit	60c ea		0.50 ea		5.99	
Mandarin	3.21		2.98		5.99	
Oranges (Navel)	2.98		2.42	2.5kg PP \$4.98	2.99	
Grapes - White	5.97					
Grapes - Black						
Grapes - Red	5.97		4.98		5.99	
Avocados						
Hass	1.25	4 piece PP \$4.77	1.25	very light green - unripe	1.59	135/155g
Shepard						
Other						
General Comments	Hass catalogue originally \$1.37					
	Store Level Special		Catalogue Special		Imported product	

All prices are in \$/kg unless otherwise stated

Section 7

All prices are in \$/kg unless otherwise stated



Australian Weekly Detailed Report BRS SYD MLB ADL PTH

Compiled by Ausmarket Consultants. Ph (07) 3379 4576 Fax (07) 3379 4103 InfoCall 1902 262 580

Prices in this report have been sourced from Market Reporting Services throughout Australia. Every effort has been made to ensure that those prices are accurate and Ausmarket Consultants shall not be liable to any party in respect to any loss or damage arising from the reliance on this information. The prices in this Report are provided as a guide only and should not be regarded as a record of every sale from every Market.

WARNING It is important that you read this message.

OUR E-MAIL MARKET REPORTS MAY CONTAIN A MECHANISM WHICH ENABLES US TO DETECT IF A REPORT IS RECEIVED BY ANY PARTY OTHER THAN THE NOMINATED SUBSCRIBER. The terms and conditions under which our Reports are supplied are clearly outlined in our Subscription/Order Form. These conditions include

:- The subscriber acknowledges that Ausmarket Consultants is the owner of copyright in the Reports. The subscription is for a single user and the subscriber must not copy or permit the copying of the Reports (which includes but is not limited to e-mailing, photocopying and faxing) without prior written consent from Ausmarket Consultants.

The subscriber must not permit the creation of a derivative work, including a database (whether in electronic form or otherwise) from the Reports.

There are instances where we have authorised multiple distribution of an e-mail Report under a single subscription. However, authorisation is limited to certain circumstances, needs our written approval, and requires that all e-mail Reports are sent by us including those to the nominated parties.

Any variation from the terms of the Subscription Agreement is in breach of copyright and could result in legal action if detected.

Australian Weekly Special 2 - 5 Crop Detailed Report BRS SYD MLB ADL PTH ending Friday 12 January 2007

Page No 1

Species/Group/Variety	Tonnes	Mkt	State/Region	Pack	Low	High	Best	Avg	Species/Group/Variety	Tonnes	Mkt	State/Region	Pack	Low	High	Best	Avg
APPLES,Fuji		PTH	W	22LCrt	8.00	32.00	32.00	25.00	Red Delicious		MLB	V	TLCtn	24.00	30.00	35.00	30.00
Fuji	639.42	BRS	T	AACtn	16.00	30.00	30.00	23.00	Red Delicious		BRS	Q	TLCtn	20.00	40.00	48.00	30.00
Fuji		ADL	S	TLCtn	40.00	48.00	48.00	44.00	Red Delicious		BRS	V	TLCtn	20.00	40.00	48.00	30.00
Fuji		ADL	V	TLCtn	30.00	30.00	30.00	30.00	Red Delicious		BRS	N	TLCtn	20.00	40.00	48.00	30.00
Fuji		MLB	S	TLCtn	35.00	44.00	48.00	41.10	Red Delicious		BRS	T	TLCtn	20.00	40.00	48.00	30.00
Fuji		MLB	V	TLCtn	35.00	44.00	48.00	41.10	Red Delicious,CA		SYD	N	TLCtn	18.00	40.00	40.00	28.60
Fuji		BRS	V	TLCtn	20.00	45.00	50.00	35.00	Red Delicious,CA		SYD	V	TLCtn	18.00	40.00	40.00	28.60
Fuji		BRS	T	TLCtn	20.00	45.00	50.00	35.00	Red Delicious,CA		SYD	S	TLCtn	18.00	40.00	40.00	28.60
Fuji,CA		SYD	N	SLTray	10.00	30.00	34.00	20.00	Red Delicious,CA		SYD	T	TLCtn	18.00	40.00	40.00	28.60
Fuji,CA		SYD	V	SLTray	10.00	30.00	34.00	20.00	Royal Gala		SYD	S	5KgTray	26.00	30.00	30.00	28.00
Fuji,CA		SYD	N	TLCtn	18.00	48.00	48.00	33.00	Royal Gala		SYD	S	TLCtn	24.00	50.00	50.00	37.00
Fuji,CA		SYD	V	TLCtn	18.00	48.00	48.00	33.00	Royal Gala		SYD	N	TLCtn	24.00	50.00	50.00	37.00
Golden Del.		MLB	T	TLCtn	34.00	36.00	40.00	35.00	Royal Gala		ADL	S	TLCtn	30.00	55.00	55.00	42.20
Golden Del.		MLB	V	TLCtn	34.00	36.00	40.00	35.00	Royal Gala		ADL	V	TLCtn	45.00	48.00	48.00	46.50
Granny Smith		PTH	W	36LCrt	6.00	32.00	32.00	20.00	Royal Gala		MLB	S	TLCtn	38.00	40.00	45.00	40.00
Granny Smith		BRS	Q	AACtn	14.00	30.00	44.00	25.00	Royal Gala		MLB	V	TLCtn	38.00	40.00	45.00	40.00
Granny Smith		BRS	V	AACtn	14.00	30.00	44.00	25.00	Royal Gala,CA		BRS	N	DLCtn	30.00	50.00	60.00	40.00
Granny Smith		BRS	N	AACtn	14.00	30.00	44.00	25.00	Royal Gala,CA		BRS	V	DLCtn	30.00	50.00	60.00	40.00
Granny Smith		BRS	W	AACtn	14.00	30.00	44.00	25.00	Royal Gala,CA		BRS	T	DLCtn	30.00	50.00	60.00	40.00
Granny Smith		BRS	V	DLCtn	18.00	36.00	45.00	25.00	Royal Gala,CA		BRS	N	TLCtn	30.00	50.00	60.00	40.00
Granny Smith		BRS	W	DLCtn	18.00	36.00	45.00	25.00	Royal Gala,CA		BRS	V	TLCtn	30.00	50.00	60.00	40.00
Granny Smith		ADL	S	TLCtn	30.00	36.00	36.00	33.00	Royal Gala,CA		BRS	T	TLCtn	30.00	50.00	60.00	40.00
Granny Smith		ADL	V	TLCtn	24.00	28.00	28.00	26.00	Summer Red		ADL	S	TLCtn	24.00	36.00	36.00	30.00
Granny Smith		MLB	V	TLCtn	30.00	34.00	34.00	32.00	Sundowner		PTH	W	22LCrt	12.00	26.00	26.00	20.00
Granny Smith		MLB	W	TLCtn	30.00	34.00	34.00	32.00	Sundowner		BRS	Q	AACtn	18.00	30.00	30.00	26.00
Granny Smith		BRS	Q	TLCtn	12.00	30.00	40.00	24.00	Sundowner		BRS	N	AACtn	18.00	30.00	30.00	26.00
Granny Smith		BRS	V	TLCtn	12.00	30.00	40.00	24.00	Sundowner		BRS	T	AACtn	18.00	30.00	30.00	26.00
Granny Smith		BRS	N	TLCtn	12.00	30.00	40.00	24.00	Sundowner		BRS	W	AACtn	18.00	30.00	30.00	26.00
Granny Smith,CA		SYD	N	TLCtn	16.00	36.00	40.00	26.00	Sundowner		BRS	N	DLCtn	20.00	36.00	40.00	28.00
Granny Smith,CA		SYD	V	TLCtn	16.00	36.00	40.00	26.00	Sundowner		BRS	T	DLCtn	16.00	28.00	36.00	22.00
Granny Smith,CA		SYD	T	TLCtn	16.00	36.00	40.00	26.00	Sundowner		BRS	V	DLCtn	16.00	28.00	36.00	22.00
Granny Smith,CA		SYD	W	TLCtn	16.00	36.00	40.00	26.00	Sundowner		SYD	N	TLCtn	20.00	36.00	36.00	28.00
Lady Williams		PTH	W	36LCrt	6.00	20.00	20.00	13.00	Sundowner		SYD	V	TLCtn	20.00	36.00	36.00	28.00
Lady Williams		BRS	Q	DLCtn	14.00	26.00	30.00	22.00	Sundowner		ADL	S	TLCtn	26.00	36.00	36.00	31.00
Lady Williams		BRS	N	DLCtn	14.00	26.00	30.00	22.00	Sundowner		MLB	T	TLCtn	25.00	28.00	30.00	28.00
Lady Williams		BRS	V	DLCtn	14.00	26.00	30.00	22.00	Sundowner		BRS	Q	SLTray	19.00	19.00	19.00	19.00
Lady Williams		BRS	T	DLCtn	14.00	26.00	30.00	22.00	PEARS,Asian		MLB	I-China	10KgCtn	22.00	23.00	23.00	23.00
Lady Williams		ADL	S	TLCtn	24.00	30.00	36.00	27.00	Clapps Fav.	67.49	BRS	V	13KgCtn	20.00	26.00	26.00	23.00
Lady Williams		MLB	N	TLCtn	28.00	30.00	30.00	29.00	Clapps Fav.		BRS	V	18KgCtn	36.00	36.00	36.00	36.00
Pink Lady		PTH	W	22LCrt	12.00	36.00	36.00	22.20	Clapps Fav.		SYD	V	APCtn	20.00	26.00	26.00	23.00
Pink Lady		BRS	V	AACtn	18.00	40.00	55.00	29.00	Clapps Fav.		BRS	Q	APCtn	20.00	30.00	30.00	25.00
Pink Lady		BRS	N	AACtn	18.00	40.00	55.00	29.00	Clapps Fav.		BRS	V	APCtn	28.00	36.00	36.00	32.00
Pink Lady		BRS	T	DLCtn	18.00	50.00	60.00	40.00	Clapps Fav.,No1		MLB	V	APCtn	25.00	25.00	25.00	25.00
Pink Lady		BRS	V	DLCtn	18.00	50.00	60.00	40.00	Duchess		ADL	S	13KgCtn	33.00	33.00	33.00	33.00
Pink Lady		BRS	V	SLTray	16.00	24.00	30.00	20.00	Duchess		ADL	S	13KgCtn	33.00	33.00	33.00	33.00
Pink Lady		BRS	N	SLTray	16.00	24.00	30.00	20.00	Duchess,New Season		ADL	S	18KgCtn	45.00	45.00	45.00	45.00
Pink Lady		ADL	S	TLCtn	36.00	48.00	48.00	42.00	Duck (Ya)		ADL	I-China	13.5KgC	28.00	28.00	28.00	28.00
Pink Lady		MLB	S	TLCtn	40.00	45.00	50.00	42.50	Duck (Ya)		BRS	I-China	13KgCtn	18.00	20.00	20.00	19.00
Pink Lady		MLB	V	TLCtn	40.00	45.00	50.00	42.50	Duck (Ya)		BRS	I-China	15KgCtn	20.00	26.00	26.00	23.00
Pink Lady		BRS	N	TLCtn	32.00	44.00	48.00	38.00	Duck (Ya)		ADL	I-China	5KgTray	15.00	15.00	15.00	15.00
Pink Lady,CA		SYD	N	TLCtn	24.00	45.00	48.00	34.50	Fragrant		MLB	I-China	9KgCtn	26.00	26.00	26.00	26.00
Pink Lady,CA		SYD	V	TLCtn	24.00	45.00	48.00	34.50	Josephine		BRS	V	TLCtn	26.00	30.00	30.00	28.00
Pink Lady,CA		SYD	S	TLCtn	24.00	45.00	48.00	34.50	Josephine		BRS	N	TLCtn	26.00	30.00	30.00	28.00
Pink Lady,CA		SYD	T	TLCtn	24.00	45.00	48.00	34.50	Packham Triumph		ADL	S	13KgCtn	33.00	39.00	39.00	36.00
Pink Lady,CA		SYD	W	TLCtn	24.00	45.00	48.00	34.50	Packham Triumph		ADL	S	18KgCtn	45.00	54.00	54.00	49.50
Red Delicious		BRS	Q	AACtn	14.00	36.00	48.00	25.00	Packham Triumph		PTH	W	36LCrt	10.00	55.00	55.00	35.00
Red Delicious		BRS	V	AACtn	14.00	36.00	48.00	25.00	Packham Triumph		BRS	V	APCtn	20.00	44.00	50.00	30.00
Red Delicious		BRS	N	AACtn	14.00	36.00	48.00	25.00	Packham Triumph		MLB	V	TLCtn	30.00	35.00	40.00	32.50
Red Delicious		ADL	S	TLCtn	30.00	36.00	36.00	33.00	Packham Triumph		BRS	V	TLCtn	24.00	36.00	40.00	30.00
Red Delicious		ADL	V	TLCtn	26.00	30.00	30.00	28.00	Packham Triumph		BRS	N	TLCtn	27.00	37.00	40.00	30.00
Red Delicious		MLB	S	TLCtn	24.00	30.00	35.00	30.00	Paradise		ADL	S	5KgCtn	25.00	25.00	25.00	25.00

Species/Group/Variety	Tonnes	Mkt	State/Region	Pack	Low	High	Best	Avg	Species/Group/Variety	Tonnes	Mkt	State/Region	Pack	Low	High	Best	Avg
Paradise		SYD	N	9LCtn	8.00	20.00	24.00	12.90									
Paradise		SYD	V	9LCtn	8.00	20.00	24.00	12.90									
Paradise		MLB	V	9LCtn	12.00	15.00	15.00	13.50									
Paradise		BRS	V	9LCtn	25.00	25.00	25.00	25.00									

PLEASE NOTE: Intakes by commodity (Tonnes) for each
Market appear beside the first listing for that Market.
STATE: A=ACT, N=NSW, Y=NORTHERN TERRITORY, Q=QLD, S=SA,
T=TAS, W=WA, V=VIC, I=IMPORTED



SYDNEY PRODUCE SURVEYORS

Horticultural Surveyors & Consultants

ABN 96065749144

SUBJECT: SYDNEY MARKETS TRADING OVERVIEW WEEK ENDING 12th of January 2007.

Fruits were generally slow with a built-up of carryover with easing prices. Bananas continued to sell strongly and with heavy arrivals with a clearing market. All other fruits were slow with over-supplies of Mangos, Peaches, Nectarines and a range of alternative fruits in good supply. There were new season South Aust. Gala Apples and Vic. Clapps Pears sighted this week. Old season Apples had fair sales. Avocados were also stronger.

Species	Variety	Price Range	Variety	Price Range
Apples	<i>Fuji (Tray)</i>	\$10.00-\$30.00Bst \$34.00	<i>Fuji (3LCtn)</i>	\$18.00-\$48.00
	<i>Sundowner</i>	\$20.00-\$36.00- 3L Ctns	<i>G.Smith(3LCtn)</i>	\$16.00-\$36.00Bst \$40.00
	<i>Pink Lady</i>	\$24.00-\$45.00Bst\$48.00	<i>Red Del.</i>	\$18.00-\$40.00
	<i>GalaSLTray</i>	\$26.00-\$30.00	<i>GalaTLTray</i>	\$24.00-\$50.00
Apricots	<i>All 10-kg</i>	\$10.00-\$40.00	<i>All 5-kg</i>	\$8.00-\$26.00 Bst\$30.00 TAS
Avocados	<i>Hass</i>	\$20.00-\$36.00East states	<i>Hass</i>	\$30.00-\$40.00 (W.A.)
Bananas	<i>Cavendish</i>	\$15.00-\$26.00Bst\$30.00	<i>Lady Fing</i>	\$30.00-\$45.00Best \$50.00
Berries	<i>Blues</i>	\$2.00-\$3.00	<i>Raspberry</i>	\$3.00-\$3.50
	<i>Blackberries</i>	\$1.10-\$2.50		
Cherries	<i>All 5-kg</i>	\$16.00-\$40.00Bst \$45.00	<i>All 2-kg</i>	\$14.00-\$30.00 Bst \$34.00 TAS
Figs	<i>Blacks</i>	\$25.00-\$50.00	<i>Greens</i>	\$25.00-\$45.00
Grapefruit	<i>Marsh</i>	\$5.00-\$20.00 Bst \$24.00	<i>Reds</i>	\$6.00-\$20.00Best \$35.00Impt
Grapes	<i>Muscat</i>	\$36.00-\$40.00	<i>RedGlobe</i>	\$20.00-\$30.00
	<i>Crimson</i>	\$26.00-\$36.00	<i>Flame</i>	\$20.00-\$30.00
	<i>Menindee</i>	\$18.00-\$24.00	<i>Cardinals</i>	
HoneyDew	<i>White</i>	\$8.00-\$14.00	<i>Gold</i>	\$10.00-\$16.00
Kiwifruit	<i>Haywood</i>	\$16.00-\$20.00 (Italy)		
Lemons	<i>Eureka</i>	\$20.00-\$45.00	<i>Eureka</i>	\$35.00-\$60.00 (Qld. & USA)
Limes		\$8.00-\$16.00		
Lychees	<i>FZS</i>	\$30.00-\$40.00	<i>KMPink/B3</i>	\$10.00-\$24.00
	<i>TaiSo</i>	\$10.00-\$24.00	<i>Selathiel</i>	\$30.00-\$40.00
Mangoes	<i>KPQld.</i>	\$2.00-\$16.00	<i>KPMareeba</i>	\$8.00-\$16.00 Bst \$18.00
	<i>R2E2</i>	\$5.00-\$14.00 Bst \$16.00	<i>H.Gold</i>	\$12.00-\$16.00 Bst \$20.00
Nectarins	<i>Yellow-10kg</i>	\$10.00-\$20.00Bst\$24.00	<i>Yellow-5-kg</i>	\$10.00-\$18.00
	<i>White-10kg</i>	\$10.00-\$24.00Bst\$26.00	<i>White-5-kg</i>	\$12.00-\$18.00
Oranges	<i>Navels</i>	\$10.00-\$30.00	<i>Valencias</i>	\$8.00-\$16.00 Best \$20.00
	<i>Navels USA</i>	\$20.00-\$40.00Bst\$45.00		
Papaya	<i>Solo</i>	\$8.00-\$30.00	<i>Papaw</i>	\$18.00-\$26.00
Passionfruit	<i>Blacks</i>	\$12.00-\$24.00	<i>Panama</i>	\$14.00-\$20.00
Peaches	<i>Yellow-10</i>	\$10.00-\$24.00	<i>Yellow-5-kg</i>	\$10.00-\$17.00
	<i>GoldQn-10k</i>	\$18.00-\$24.00	<i>White-5-kg</i>	\$12.00-\$16.00
Pears	<i>Packham</i>	\$20.00-\$60.00	<i>Paradise 5-kg</i>	\$8.00-\$20.00Bst\$25.00
	<i>Ya</i>	\$18.00-\$26.00 (China)	<i>Nashi</i>	\$20.00-\$24.00 (China)
	<i>ClappsFt</i>	\$20.00-\$36.00		
Pineapples	<i>Smooth L</i>	\$12.00-\$18.00 (Cartons)	<i>Hybrids</i>	\$10.00-\$16.00 (Trays)
Plums	<i>Angellina</i>	\$20.00-\$36.00 (10-kg)	<i>Black Beaut</i>	\$24.00-\$30.00 (10-kg)

	<i>Earliqueen</i>	\$14.00-\$20.00 (5-kg)	<i>Pizazz</i>	\$10.00-\$40.00 (10-kg)
	<i>P.Majesty</i>	\$18.00-\$30.00 (10-kg)	<i>Donsworth</i>	\$15.00-\$22.00
	<i>Tegan Blue</i>	\$18.00-\$20.00 (10-kg)	<i>Fortune</i>	\$14.00-\$30.00
Rockmelon	<i>All Trays</i>	\$6.00-\$12.00Best\$14.00	<i>All Bushels</i>	\$8.00-\$12.00Bst\$14.00
Strawberries	<i>All Varieties</i>	\$0.50-\$1.50Bst\$1.80		
Watermelons	<i>Seedless</i>	\$0.40-\$0.80 / Kg	<i>Seeded</i>	\$0.40-\$0.50 /Kg

There were light supplies of alternative Tropical & Sub-tropical fruits from Qld. & Darwin, including: Carambolas, **Coconuts**, **Green Guavas**, **Jackfruit**, **Umbrellas**, **Pitaya** and **USA Pomegranates**.

Forecasts & predictions include: There will continue to be large arrivals of **Bananas** next week. Mangoes have now flushed and are over-supplied as is the Peach & Nectarine markets which will take some time to clear. No improvement in the current market is expected until the end of the month.

Chris Cope



Australian Daily Special 1 Crop Report

Ausmarket Consultants PO Box 229 Brisbane Market QLD 4106 Ph (07) 3379 4576 Fax (07) 3379 4103

Prices in this report have been sourced from Market Reporting Services throughout Australia. Every effort has been made to ensure that those prices are accurate and Ausmarket Consultants shall not be liable to any party in respect to any loss or damage arising from the reliance on this information. The prices in this Report are provided as a guide only and should not be regarded as a record of every sale from every Market.

WARNING

It is important that you read this message.

Our e-mail Market Reports may contain a mechanism which enables us to detect if a Report is received by any party other than the nominated subscriber.

The terms and conditions under which our Reports are supplied are clearly outlined in our Subscription/Order Form. These conditions include :-

The subscriber acknowledges that Ausmarket Consultants is the owner of copyright in the Reports. The subscription is for a single user and the subscriber must not copy or permit the copying of the Reports (which includes but is not limited to e-mailing, photocopying and faxing) without prior written consent from Ausmarket Consultants.

The subscriber must not permit the creation of a derivative work, including a database (whether in electronic form or otherwise) from the Reports.

There are instances where we have authorised multiple distribution of an e-mail Report under a single subscription. However, authorisation is limited to certain circumstances, needs our written approval, and requires that all e-mail Reports are sent by us including those to the nominated parties.

Any variation from the terms of the Subscription Agreement is in breach of copyright and could result in legal action if detected.

Australian Daily Special 1 Crop Report BRS SYD MLB ADL PTH for Thursday 01 March 2007

Page No 1

Species/Tonnes/Variety	Market	State	Region	Pack	Price Range	Most Sales	Best	Av Kg	Supply	Deman	C'over	Quality
APPLES,Ginger Gold	ADL	S	Hills	TLCtn	30.00			12	Light	Fair	Some	Good
Golden Del.	ADL	S		TLCtn	30.00			12	Light	Adeq	Some	Good
Granny Smith	ADL	S		TLCtn	30.00 - 32.00			12	Mod	Adeq	Some	Good
Lady Williams	ADL	S		TLCtn	24.00 - 30.00			12	Light	Adeq	Some	Good
Red Delicious	ADL	S		TLCtn	24.00 - 30.00			12	Light	Adeq	Some	Good
Royal Gala	ADL	S		TLCtn	20.00 - 24.00			12	Light	Adeq	Some	Mixed
Royal Gala	ADL	S	Hills	TLCtn	30.00 - 32.00			12	Light	Adeq	Some	Good
Royal Gala	ADL	V		TLCtn	12.00 - 20.00			12	VLight	Adeq	Some	Good
Sundowner	ADL	S		TLCtn	24.00 - 30.00			12	Mod	Adeq	Some	Good
Sundowner	ADL	V		TLCtn	15.00 - 20.00			12	VLight	Adeq	Some	Good
Granny Smith	143.87T BRS	VN		AACtn	14.00 - 36.00	20.00 - 30.00		19	Good	Fair	Some	
Granny Smith	BRS	VN		TLCtn	12.00 - 30.00	20.00 - 28.00		12	Mod	Fair	Some	
Granny Smith	BRS	VW		DLCtn	18.00 - 45.00	20.00 - 30.00		12	Light	Adeq		
Granny Smith,New Season	BRS	Q		AACtn	18.00 - 30.00			19	Light	Fair		
Hi-Early Del.	BRS	QVN		AACtn	18.00 - 30.00	20.00 - 24.00	36.00	19	Light			
Hi-Early Del.	BRS	QVN		TLCtn	16.00 - 30.00	20.00 - 24.00		12	Light			
Jonagold	BRS	Q		AACtn	16.00 - 24.00			19	Light	Adeq		
Jonathan	BRS	VW		AACtn	14.00 - 30.00	16.00 - 24.00	32.00	19	Light	Fair		
Red Delicious	BRS	VN		AACtn	14.00 - 36.00		48.00	19	Mod	Fair	Some	
Red Delicious	BRS	VNT		TLCtn	20.00 - 40.00	24.00 - 36.00	48.00	12	Mod	Fair	Some	
Royal Gala	BRS	N		TLCtn	18.00 - 36.00	24.00 - 32.00		12	Light	Adeq		
Royal Gala	BRS	QS	0	AACtn	12.00 - 28.00	16.00 - 24.00		19	Mod	Adeq		
Royal Gala	BRS	QSV		TLCtn	14.00 - 28.00	16.00 - 24.00	32.00	12	Mod	Adeq		
Sundowner	BRS	NSV		AACtn	18.00 - 30.00	24.00 - 28.00		19	Light			
Sundowner	BRS	V		DLCtn	16.00 - 24.00			12	VLight			
Golden Del.	MLB	V		TLCtn	30.00 - 35.00			12	Good	Adeq	Some	Good
Granny Smith	MLB	VW		TLCtn	25.00 - 30.00			12	Mod	Good	Some	Good
Jonathan	MLB	SV		TLCtn	25.00 - 35.00			12	Mod	Good	Some	Good
Lady Williams	MLB	N		TLCtn	20.00 - 25.00			12	Good	Adeq	Some	Good
Red Delicious	MLB	NSV		TLCtn	30.00 - 40.00			12	Mod	Good	Some	Good
Royal Gala	MLB	SV		TLCtn	25.00 - 30.00			12	Mod	Good	Some	Good
Sundowner	MLB	T		TLCtn	25.00 - 35.00			12	Mod	Adeq	Some	Good
Fuji	PTH	W		22LCrt	8.00 - 24.00	12.00 - 20.00		13	Good	Good		
Golden Del.	PTH	W		22LCrt	12.00 - 24.00	12.00 - 20.00		13	Good	Good		
Granny Smith	PTH	W		36LCrt	6.00 - 24.00	12.00 - 20.00	28.00	20	Mod	Fair		
Pink Lady	PTH	W		22LCrt	5.00 - 24.00	6.00 - 16.00		13	Good	Good		
Royal Gala	PTH	W		22LCrt	8.00 - 24.00	8.00 - 18.00		13	Good	Good		
Sundowner	PTH	W		DLCtn	4.00 - 12.00	6.00 - 12.00		12	Heavy	Slow	Some	
Early Gold	SYD	V		SLTray	14.00 - 16.00			6	VLight	Fair	Some	Good
Granny Smith	SYD	QNV		TLCtn	16.00 - 26.00		32.00	12	Light	Fair	Some	Good
Granny Smith,CA	SYD	NVTW		TLCtn	14.00 - 32.00			12	Light	Fair	Some	Good
Jonagold	SYD	Q		TLCtn	20.00 - 30.00			12	Light	Fair	Some	Good
Jonathan	SYD	Q		TLCtn	20.00 - 36.00			12	VLight	Good	Some	Good
Lady Williams,CA	SYD	V		TLCtn	12.00 - 24.00			12	VLight	Fair	Some	Good

Species/Tonnes/Variety	Market	State	Region	Pack	Price Range	Most Sales	Best	Av Kg	Supply	Deman	C'over	Quality
Red Delicious	SYD	QN		TLCtn	20.00 - 36.00			12	Light	Good	Some	Good
Red Delicious,CA	SYD	NVST		TLCtn	18.00 - 36.00			12	Light	Slow	Some	Good
Royal Gala	SYD	QNVS		TLCtn	16.00 - 30.00			12	Good	Good	Some	Good
Sundowner	SYD	NV		TLCtn	14.00 - 28.00			12	Light	Fair	Some	Good

PLEASE NOTE: Intakes by commodity (Tonnes) for each Market appear beside the first listing for that Market.
STATE: A=ACT, N=NSW, Y=NORTHERN TERRITORY, Q=QLD, S=SA, T=TAS, W=WA, V=VIC, I=IMPORTED



Australian Daily Special 1 Crop Report

Ausmarket Consultants PO Box 229 Brisbane Market QLD 4106 Ph (07) 3379 4576 Fax (07) 3379 4103

Prices in this report have been sourced from Market Reporting Services throughout Australia. Every effort has been made to ensure that those prices are accurate and Ausmarket Consultants shall not be liable to any party in respect to any loss or damage arising from the reliance on this information. The prices in this Report are provided as a guide only and should not be regarded as a record of every sale from every Market.

WARNING

It is important that you read this message.

Our e-mail Market Reports may contain a mechanism which enables us to detect if a Report is received by any party other than the nominated subscriber.

The terms and conditions under which our Reports are supplied are clearly outlined in our Subscription/Order Form. These conditions include :-

The subscriber acknowledges that Ausmarket Consultants is the owner of copyright in the Reports. The subscription is for a single user and the subscriber must not copy or permit the copying of the Reports (which includes but is not limited to e-mailing, photocopying and faxing) without prior written consent from Ausmarket Consultants.

The subscriber must not permit the creation of a derivative work, including a database (whether in electronic form or otherwise) from the Reports.

There are instances where we have authorised multiple distribution of an e-mail Report under a single subscription. However, authorisation is limited to certain circumstances, needs our written approval, and requires that all e-mail Reports are sent by us including those to the nominated parties.

Any variation from the terms of the Subscription Agreement is in breach of copyright and could result in legal action if detected.

Australian Daily Special 1 Crop Report BRS SYD MLB ADL for Thursday 01 March 2007

Page No 1

Species/Tonnes/Variety	Market	State	Region	Pack	Price Range	Most Sales	Best	Av Kg	Supply	Deman	C'over	Quality	
PEARS,B. Bosc,New Season	ADL	S		13KgCtn	23.00 - 26.00			13	Light	Adeq	Some	Good	
B.Bosc,New Season	ADL	S		18KgBkt	30.00 - 32.00			18	Light	Adeq	Some	Good	
Duchess	ADL	S		13KgCtn	20.00 - 26.00			13	Mod	Adeq	Some	Good	
Duchess,New Season	ADL	S		18KgCtn	27.00 - 32.00			18	Mod	Adeq	Some	Good	
Duchess,Extra	ADL	S		18KgCtn	44.00			18	Light	Adeq	Some	Good	
Morantini Rosa	ADL	S		6KgTray	18.00			6	VLight	Fair	Some	Good	
Packham Triumph	ADL	V		18KgCtn	40.00 - 45.00			18	VLight	Adeq	Some	Good	
Red Sensation	ADL	S		18KgCtn	30.00 - 34.00			18	VLight	Adeq	Some	Good	
Red Sensation,Extra	ADL	S		18KgCtn	44.00			18	VLight	Adeq	Some	Good	
B.Bosc	132.34T	BRS	Q	DLCtn	30.00			8					
B.Bosc		BRS	QNV	APCtn	18.00 - 24.00		30.00	16	Light	Adeq			
B.Bosc		BRS	V	TLCtn	20.00 - 22.00			13	Light				
Duck (Ya)		BRS	I	China	13KgCtn	18.00 - 20.00		13	Light	Fair			
Duck (Ya)		BRS	I	China	15KgCtn	20.00 - 26.00		15	Light	Fair			
Packham Triumph		BRS	V		APCtn	18.00 - 24.00		30.00	16	Light	Adeq		
Paradise		BRS	V		9LCtn	15.00 - 20.00		5	VLight	Adeq			
W.B.C.		BRS	V		APCtn	20.00 - 34.00	24.00 - 30.00	16	Light	Fair			
W.B.C.		BRS	V		TLCtn	16.00 - 26.00		13	VLight	Fair			
Asian,Small		MLB	I	China	10KgCtn	24.00 - 25.00		10	Mod	Adeq	Some	Good	
Asian,Small		MLB	V		5KgCtn	12.00 - 16.00		5	Light	Slow	Some	Good	
Honey		MLB	V		18LCtn	20.00 - 25.00		10	Light	Adeq	Some	Good	
W.B.C.		MLB	V		TLCtn	15.00 - 25.00	20.00	13	Light	Adeq	Some	Good	
B.Bosc		SYD	V		APCtn	16.00 - 30.00		16	Light	Fair	Some	Good	
Duck (Ya)		SYD	I	China	15KgCtn	18.00 - 20.00	18.00	15	Light	Fair	Some	Fair	
Fragrant		SYD	I	China	15KgCtn	18.00 - 22.00		15	Light	Fair	Some	Fair	
Paradise		SYD	NV		9LCtn	10.00 - 20.00		5	Good	Fair	Some	Mixed	
Red Sensation		SYD	V		5KgTray	12.00 - 16.00	12.00 - 14.00	5	Mod	Fair	Some	Good	
Red William		SYD	V		APCtn	16.00 - 24.00		16	Light	Fair	Some	Good	
W.B.C.		SYD	V		APCtn	16.00 - 24.00		30.00	16	Mod	Fair	Some	Good

PLEASE NOTE: Intakes by commodity (Tonnes) for each Market appear beside the first listing for that Market.

STATE: A=ACT, N=NSW, Y=NORTHERN TERRITORY, Q=QLD, S=SA, T=TAS, W=WA, V=VIC, I=IMPORTED



Apple Position 1/07

The apple harvest is well under way and a clear picture is emerging of the likely volume available for fresh marketing in 2007.

In summary, the packed fruit volume is likely to be similar or only slightly more than last year, even though total volume is up by 10 to 14%. Natural events (drought, frost, hail and sunburn) and unnatural events (especially Western Flower Thrip damage to Granny Smiths in the Goulburn Valley) have caused the reduction in fruit suitable for fresh marketing.

One benefit of the seasonal conditions will be excellent skin finish across most varieties and most districts.

For most varieties put into storage this year, a much higher proportion of fruit has been treated with Smartfresh®. This should ensure good eating apples with good pressures will be available throughout 2007.

A snapshot for each of the main varieties follows (accurate information is not available on some varieties, such as Golden delicious and Braeburn):

Gala

- Most Goulburn Valley fruit has been marketed. Most other districts (except southern Tasmania) have finished harvest. Overall quality is good.

Jonathon

- Quality from the main production areas in southern Victoria and Adelaide Hills is outstanding and reflected in strong demand.
- Supplies will only last for another 3 weeks, based on current sales.

Granny Smith

- Harvest is under way and there is good quality fruit in most districts.
- In the major production area of the Goulburn Valley, size and quality are variable, with significant Western Flower Thrip damage, reducing volumes available for the fresh market.

Red Delicious

- Harvest is under way.
- Picking for colour has been necessary in a number of districts because of recent heat.

Fuji

- Harvest is about to start.
- Crops appear to be more affected by heat (skin finish) than other varieties, so pack outs will be down.

Pink Lady and Sundowner

- At this stage (with well over a month to go before harvest for Pink Lady and around two months for Sundowner) good crops are being reported across most districts, with size developing well.

9 March 2007

Apple and Pear Australia Ltd
39 O'Connell Street
North Melbourne Vic 3051

Ph 03 93293511
ABN 55 490626489

Australian Fresh Fruit Company P/L
PO Box 363
Gisborne Vic 3437

Ph 03 54207444
ABN 18 066904621

Please note: This information has been collated by John Baker of Produce Marketing Australia from a variety of sources and relies on the accuracy and timing of information provided.

Pear Position 1/07



Introduction:

Welcome to the first issue of a joint information initiative between AFFCO (The Australian Fresh Fruit Company) and APAL (Apple & Pear Australia Ltd), to keep you informed about the 2007 pear supply situation.

This report and subsequent issues are sourced from round-table discussions between major pear grower and packer members of AFFCO in the Goulburn Valley and around Australia, information from APAL's pear steering group & membership and various other sources.

Overall:

Weather conditions have had a big impact on both the Williams and Packhams crops, through a combination of spring frosts and the continuing drought. This report covers mainly the Goulburn Valley where there are some limited areas which have been unaffected by conditions. Future reports will cover other areas such as WA and SA more extensively.

Williams:

The harvest is well under way with more intense activity over the next 10 to 14 days. Some key points about the 2007 crop:

- In summary - the crop available for fresh marketing is well down on last year (especially after cannery requirements are taken into account)
- There is a higher proportion of small and medium sized fruit, because of the drought
- Quality is an issue, because of frost damage, with minor skin defects the most obvious
- Many growers are marketing straight from the tree, so there will be less fruit going into c.a.
- Overall, this means the season will end at least two weeks earlier than last year. The current forecast is for Williams to be finished by the first week in May or possibly earlier.

Packhams:

Harvest will start next week, which is earlier than usual. Current indications are:

- Total production could be up about 5% but fresh market fruit will be well down. However, if Packhams follow the trend of Williams – the yield could end up being lower.
- Frost damage has caused a lot of misshapen fruit to develop
- Size is down slightly
- As a result, packed volumes of No 1 Grade fruit are likely to be down by at least 20% on last year
- The marketing season should start earlier than usual because of the short Williams crop, meaning less fruit will be available over a longer marketing season.

NEXT REPORT: Mid February, when the Williams harvest will be complete and the Packham harvest will be well under way.

Apple and Pear Australia Ltd
39 O'Connell Street
North Melbourne
Victoria 3051

Australian Fresh Fruit Company P/L
PO Box 363
Gisborne
Victoria 3437

Ph 03 93293511
ABN 55 490626489

Ph 03 54207444
ABN 18 066904621

Please note: This information has been collated by John Baker of Produce Marketing Australia from a variety of sources and relies on the accuracy and timing of information provided.