

**Facilitating the
development of the
north Queensland
banana industry**

Jan Davis
GROWCOM

Project Number: BA04008

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Project Number **BA04008** (15th August, 2006)

**Facilitating the development of the North Queensland banana
Industry**



M/s Jan Davis

Growcom

BA04008 – Facilitating the development of the north Queensland banana industry

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Purpose: The purpose of this report is to highlight outcomes of the Banana Industry Development Officer project.

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Media Summary

In 2005 Australia's 1100 ~ 1200 banana growers produced over 20.4 million 13-kilogram cartons of bananas with an estimated wholesale value of AU\$320-350 million on an area of 14,000 hectares.

Queensland accounted for 95.6% of this production with the majority of it falling in north Queensland on the coastal belt between Kennedy in the south to Babinda in the north and on the Tablelands. Production also occurs in SE Queensland centred around Bundaberg, and the remaining producing regions are; northern New South Wales, Western Australia and the Northern Territory.

The Queensland banana industry is facing rationalisation and unprecedented change. What was once a strong market is now being eroded away by internal and external factors. Two main issues for the industry are threats from imported product and public pressure to preserve the north Queensland environment.

The industry development project was developed by industry representatives to address environmental sustainability, industry communication, information and technology transfer and marketing strategy development and training. The key components of the project include:

- Establishment of farm Natural Resource Management (NRM) recommendations and associated training priorities
- Making recommendations for marketing strategies to be utilised by Queensland growers
- Communication with Queensland banana growers via a monthly newsletter, focusing on current issues, new initiatives, research and marketing updates
- Provide an industry specific person to represent and liaise with and provide assistance on industry issues as they arise.

Some of the main outcomes of the Industry Development Officer's (IDO) project are the completion of a detailed survey into current NRM practices in north Queensland, a suggested marketing plan for growers and a defined marketing group established, a well accepted monthly newsletter distributed to all banana growers in Queensland, establishment and maintenance of a grower data base and representation on issues of significance to the industry.

The banana industry in north Queensland was extensively damaged by Cyclone Larry in March 2006. In conjunction with Growcom (formerly QFVG), the Australian Banana Growers Council (ABGC) and the Queensland Farmers Federation (QFF) the IDO played a vital role in ensuring that growers understood, and were able to receive, the benefits available under the various assistance packages being offered by state and federal governments.

The IDO project has been facilitated by HAL in partnership with Growcom. The project duration has been a one and a half year period on a 1 FTE basis. The ABGC and the Growcom Banana Special Interest Group have highlighted the continuation of the project as a priority and this should result in a new project commencing in late 2006.

Technical Summary

In 2005 Australia's 1100 ~ 1200 banana growers produced over 20.4 million 13-kilogram cartons of bananas with an estimated wholesale value of AU\$320-350 million on an area of 14,000 hectares.

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The Queensland banana industry is facing rationalisation and unprecedented change. What was once a strong market is now being eroded away by internal and external factors. Two main issues for the industry are threats from imported product and public pressure to preserve the north Queensland environment.

The IDO position builds on a previous Industry Liaison Officer position and uses the existing national strategic plan (which is up for renewal) to identify the needs of the north Queensland banana industry. The focus of the position is building grower and industry understanding of environmental issues and developing effective solutions to the challenges identified and enables growers to develop a specific market presence in targeted markets.

The main outcomes of the Industry Development Officer's project are:

- completion of a detailed survey into current natural resource management practices in north Queensland,
- identification of existing problems when marketing bananas
- a suggested marketing plan for growers and a defined marketing group established,
- a well accepted monthly newsletter distributed to all banana growers in Queensland and other industry bodies to improve industry communication
- Establishment and maintenance of a grower data base
- And representation on issues of significance to the industry.

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Introduction

Approximately 95% of Australia's banana production is based within Queensland with the majority of production coming from the far northern part of the state, bounded by Kennedy in the south to Babinda in the north and up onto the Tablelands. The industry is characterised by all year round production on an average farm size of 52 hectares. With an average price between \$15.00 and \$17.00 per 13kg carton the industry has an estimated wholesale value of between \$303.8 and \$332.3 million to the Queensland economy.

The industry is characterised by a boom and bust cycle depending on current supply. It would appear Australian banana consumers can consume comfortably 350,000 to 400,000 13kg cartons per week. When production reaches a consistent 450,000 to 500,000 and above cartons per week the market is flooded and the price paid to a producer drops dramatically, usually past a sustainable level. This cycle has led to a number of growers exiting the industry. As with most horticultural industries within Australia, production is becoming dominated by larger, well organised operations.

The continuation of the threat of imports from the Philippines places an air of uncertainty over the industry.

The far north Queensland region has been in the spotlight for a number of years concerning natural resource management issues with the Great Barrier Reef Marine Park sitting off the coast. Banana production is a very visual operation, and with public pressure to preserve the north Queensland environment the banana industry needs to be seen as being very pro-active in this area. A survey completed by the IDO of current farm practices placed the banana industry in a good position concerning environmental issues.

The banana industry is one of a few horticultural industries which does not have a national levy to support marketing and promotion, industry research and development and emergency plant pest eradication. An *ad-valorem* proposal put forward by the Australian Banana Growers Council in late 2005 by way of ballot was knocked back by growers across Australia and created a divide within the industry, those for and those against the levy.

Industry leaders identified communication as a high priority for the further development of the banana industry. The IDO has been responsible for disseminating relevant industry information to all Queensland banana growers and banana industry bodies via a monthly newsletter, press releases, radio interviews and attending relevant grower meetings.

On the 20th March 2006, Category 5 Tropical Cyclone *Larry* devastated the north Queensland banana industry, destroying 90% of plantations. It is expected to take at least nine months for the industry to get back to some scale of production. This event resulted in a review of the focus of the IDO.

Materials and Methods

The Banana Industry Development Officer is employed on a full time basis (1 FTE). Based in the Growcom Tully office, the IDO travels by vehicle to growing areas in north Queensland and by aeroplane to visit growers in the south eastern Queensland. The IDO resides in the far northern sector of the banana industry allowing easy access to the Tablelands.

The IDO project has been facilitated by HAL in partnership with Growcom.

The IDO work plan and performance was assessed by a management committee. This committee meet every 6 months (as per key activity statement) to review project activities, supply guidance and plan for further activities which take into consideration the projects set Milestone activities. A work plan was developed by the IDO before each meeting for presentation to the committee. A summary of each meeting was then supplied to the appropriate project manager within HAL.

The management committee is made up of a representative from the Australian Banana Growers Council (who is a banana grower), the Banana Special Interest Group (SIG) and the IDO's direct line manager within Growcom.

Attempts were made to include a representative from Banana Growers Queensland but this did not eventuate.

The IDO developed and maintained linkages with industry stakeholders, including growers, a range of service providers, research and extension staff, wholesalers and other industry bodies. These linkages serve well to disseminate information to aid industry development.

Results

The results of this project have been presented in a comprehensive table of activities as illustrated in *Table 1*. The table sets out key activities (as defined in the HAL Schedule for Project No: BA04008) with outputs and outcomes noted. The table does not take into consideration the many day-to-day functions the IDO carries out as part of industry development.

Table 1:
Banana Industry Development Officer activity; analysed by output versus outcome.

Activity	Output	Outcome
1. Natural Resource Management	A survey to investigate current practices within natural resource management within the banana industry (please refer to Appendix 2.2.2)	<ul style="list-style-type: none"> • Major issues identified • Industry groups consulted in the survey development • A survey to deliver to the banana producers – a series of 25 questions which could be asked on farm.
	Delivery of the survey to north Queensland banana growers – aim for 20 per cent of the industry (please refer to Appendix 2.2.1.)	<ul style="list-style-type: none"> • A decision made to deliver the survey on farm by the IDO. Past surveys conducted via post, phone has not gained acceptable response. • Survey delivered to 98 growers in the Tully, Innisfail and Tablelands regions covering an area of 5088 hectares or approximately half the growing area as of 2004.
	Distribution of survey results to industry collaborators and interested parties. (please refer to Appendix 2.2.4 & 2.2.3)	<ul style="list-style-type: none"> • Consolidation of surveys results into a usable format for industry consultation and distribution. Each question graphed to easily determine outcome • Compare results to determine current adoption rates of targets set in the “Sustaining the Wet Tropics – A Regional Plan for Natural Resource Management 2004-2008”, Draft – Section 6.6.1. • Identified current practices which do not contribute to sustainable farming practices

Activity	Output	Outcome
1. Natural Resource Management	NRM recommendations for north Queensland banana growers	<ul style="list-style-type: none"> • The only agriculturally based industry in north Queensland able to identify its position in relation to established NRM management action targets. • Recommendations and results printed in the Banana News plus solutions to recommendations
	On-going NRM input	<ul style="list-style-type: none"> • Member of the Production Action Team – Tully Floodplain Project • Six growers identified in the three main production areas willing to act as demonstration sites for better farm practices
2. Queensland banana marketing strategies	Topics established	<ul style="list-style-type: none"> • Identification of a marketing group with common interests • Identification of issues faced by banana growers when marketing their fruit • Grower visits undertaken in preference to a survey
	Grower Forum Conducted (please refer to Appendices 3 & 4)	<ul style="list-style-type: none"> • A total of 5 grower meetings conducted to identify possible solutions to the marketing problems • A marketing plan established utilising a corporate structure owned by growers to control banana sales and distribution
	Industry support for the concept and a feasibility study conducted	<ul style="list-style-type: none"> • Farm visits conducted to drum up support for the concept • Merchant involvement via the Australian Banana Wholesalers AGM. • Could only gain 37% support for the idea, therefore looking at other avenues such as a revised version of the Crop Forecasting System to identify times of glut to increase industry stability, profitability and ultimately sustainability.

Activity	Output	Outcome
3. Communication	Development of a communication plan <ul style="list-style-type: none"> - monthly newsletter (<i>Banana News</i> – please refer to Appendix 1, Vol 1-16) - media releases - radio interviews - email groups - industry publications 	<ul style="list-style-type: none"> • Information on activities, events, outcomes and opportunities is presented to growers and industry members in a timely, non-biased and consistent fashion. • A well informed industry able to act on threats and opportunities
	Development and maintenance of an up to date grower data base	<ul style="list-style-type: none"> • Accurate list of current producers with contact details • Maps to identify grower location in case of a plant disease incursion
	Wholesalers / Agents	<ul style="list-style-type: none"> • IDO has travelled to markets in Sydney, Adelaide and Melbourne to meet wholesalers and agents • Point of contact established • Negotiated with a leading wholesaler to communicate statistics to all growers identifying region, quantities and pricing of produce in the market place via the <i>Banana News</i> • All agents and wholesalers receive the <i>Banana News</i>
<i>Grower Groups</i>	IDO attends two Banana Grower Associations each month – Innisfail and Mareeba	<ul style="list-style-type: none"> • Provide growers with information on current and expected issues affecting industry • Gain grower feedback for industry response • Communication of IDO activities
<i>Chemical Registrations</i>	IDO works in conjunction with the Growcom Pest Management Officer to prepare and review submissions to APVMA	<ul style="list-style-type: none"> • An informed industry which has access to required chemicals • Collect information to back industry applications for chemical use
<i>Industry by - products</i>	IDO works in conjunction with interested parties to explore opportunities for a viable & sustainable industry based on by-products of banana production	<ul style="list-style-type: none"> • A paper production facility based on banana trunks • Waste to energy ‘proof of concept’ to convert banana waste to power generation as a possible means to

Activity	Output	Outcome
<i>Industry Recovery</i>	The IDO in conjunction with ABGC, QFF and Growcom has been working to ensure the continued productivity of the banana industry in north Queensland after Cyclone Larry	<p style="text-align: right;">reduce on farm costs</p> <ul style="list-style-type: none"> • Growers gaining the federal and state government grants to aid recovery • Growers able to access social workers for recovery purposes • An industry able to return back to production in nine months after the cyclonic event. <p>Drawing upon research previously undertaken by QDPI&F and Growcom, the HAL facilitated project FR01030 (<i>Banana Harvest Forecasting System</i>; more commonly known as the <i>Banana Crop Forecasting System</i>) has been re-assessed for its potential to be released in a beta version, for cyclone recovery purposes.</p> <p>Some issues remain to be resolved with this project, however it is believed that the ability to forecast future regional production will provide major benefits to industry and assist in the co-ordination of a managed, staggered return to full production.</p> <p>The collated production data will be a vital tool in the marketing process to assist growers making production decisions.</p>

The management committee has been responsible for monitoring the performance of the IDO and has always been satisfied with performance when the project was reviewed at management committee meetings.

Discussion

The industry development project was developed by industry representatives to address environmental sustainability, industry communication, information and technology transfer and marketing strategy development and training.

The key components of the project being:

- 1) Establishment of farm NRM recommendations and associated training priorities
- 2) Make recommendations for marketing strategies to be utilised by Queensland growers
- 3) Communication with Queensland banana growers through a monthly newsletter, focusing on current issues, new initiatives, research and marketing updates
- 4) Provide an industry specific person to represent and liaise with and provide assistance on industry issues as they arise

The project has performed strongly in three of the four areas identified by industry representatives; the marketing strategies not reaching full potential. All the components are on-going and for the industry to gain full benefit a new project is required.

Addressing the key components specifically;

1)

An NRM survey was developed in consultation with Jessica Klok from FNQ NRM to allow comparison of the data with the regional NRM targets. Questions originally asked by a previous survey were taken into consideration in order that a comparison could be made to see if industry had made any headway on identified issues. Other issues identified by the banana industry were also included in the survey. (The survey itself was also designed in such a way to enable the completion of a similar survey in the future to determine progressive industry adoption). The “mail out” process used in the previous survey received a low grower response so it was decided to run the 2005 survey via face to face interviews. This also allowed growers to discuss the issues and add important commentary. The survey was developed to be farmer friendly in a language they could understand and be completed in as little time as possible.

Through the survey the practices of 98 growers in the Kennedy, Murray, Jarra Creek, Davidson, Tully, Mission Beach, Silkwood, Menna Creek, Mourilyn, Boogan, Goondi Bend, Palmerston, Eubenangee, Upper Darragee, Wopen Creek and the Tablelands areas were reviewed. The survey covered an area of 5088 hectares of bananas which is estimated as half the growing area in North Queensland as of 2004 (10,081 hectares). It was hoped the survey included growers in South East Queensland but due to time constraints this was not possible.

The survey results have been used extensively by government departments (CSIRO, Dept. NRM&W, Dept. Primary Industries, FNQ NRM) to update their data bases and define projects for further evaluation to facilitate an environmentally sustainable banana industry in Queensland.

The survey noted there are a number of natural resource management systems in operation within the banana industry aiming towards a sustainable industry and a recommendation was made to adopt a single “farmer friendly” system to create common goals, ideas and provide one strong message to growers about what they need to achieve and what direction to take. This can be achieved through the Farm Management System (FMS) which will take into account the work already undertaken and management systems already in place. The system is supported by Growcom and the Queensland Farmers Federation as well as the Queensland government.

Most importantly the survey demonstrated the banana industry has been progressing forward over a time frame to work towards an environmentally sustainable industry, and was the first industry in North Queensland to document the uptake against agreed targets.

In addition, particular issues of note were;

- a reduction in yearly fertiliser applications resulting in reduced leeching to the Great Barrier Reef lagoon
- that groups within the banana industry were identified as experiencing language barriers to the possible uptake of NRM information and therefore a recommendation was made to translate information being made available to growers into the appropriate language(s)
- the discovery of a major problem with on-farm rubbish removal and the costs associated with removal as a barrier to recycling and correct disposal. As a result the industry publication “*Banana News*” offered solutions to growers for correct disposal. The IDO was instrumental in coordinating with *Operation Farm Clear* to remove a huge amount of plastics (such as poly irrigation pipe and banana bags) in an environmentally sustainable manner.

However, it should be noted that two limitations to the survey were identified, viz:

- Firstly, what the grower likes to think they are doing may not represent what is actually happening in the paddock. Being the interviewer, the IDO could only go on the answer provided, but in many cases knowing the grower and their operation allowed for a reality check.
- Secondly, the survey could not take into consideration area effects. The survey covered the flat coastal belt, the hilly regions in the Palmerston and the dryer climates of the Tablelands. Grower practices change quite considerably between the coastal belt and the Tablelands, for example growers on the Tablelands try to conserve every drop of water as on the coast the grower is trying to avoid water logging.

As a general note, the larger growers are well advanced in NRM issues and are keen to implement strategies outlined by FNQ NRM to be sustainable. The survey found that smaller operations were more likely to have a lower awareness of regional NRM issues (acknowledging this factor, future IDO focus would be adjusted accordingly).

In summary, the latest NRM survey identified that the banana industry is progressing well against the established Management Action Targets within the FNQ NRM Regional Plan. However, requirements for primary industries to be able to demonstrate sustainable environmental practices within the Great Barrier Reef catchments are expected to continue to increase over the next three years.

The industry can continue to make progress through the IDO providing effective communication and facilitating the linkages between industry, funding.

Please make reference to the Appendix 2 documents;

Natural Resource Management Survey

2.1. “Environmentally Friendly Farming” A Survey for Queensland Banana Growers

2.2. Banana Survey Results 28/06/05

2.3. Results vs. Targets (“Sustaining the Wet Tropics – A Regional Plan for Natural Resource Management 2004-08” Draft, section 6.6.1

2.4. Collated Responses by Question (1-25) ~ illustrated graphically

2)

The marketing strategy is not easily solved and it requires an industry which is able to accept change. With an industry operating in the same manner since the 1930s, it is difficult to effect change even if the players can see an advantage in such change. The banana industry also finds it extremely difficult to work together to achieve a common goal. The IDO is aware of two past attempts to organise a common marketing entity, but both have failed due to grower interactions.

Nevertheless, the IDO prepared a proposal to undertake the study to examine the feasibility of the establishment of a fully commercial operation to manage the marketing of bananas in the domestic and export markets. Following discussion with the Banana Marketing Group it was felt that 60 – 70% support of the current banana production would be sufficient to effect a change and develop the concept into a viable model.

The concept was to create a commercial operation, owned by growers, to profitably manage the marketing of bananas. The aim was to inject entrepreneurial and commercial discipline into the industry. This approach would have revolutionised the industry and returned a greater proportion of end sale price to the growers. By managing supply and sales, oversupply and subsequent price collapse would have been avoided.

The proposed structure of the operation was designed in such a way as to serve the interests of the shareholders (growers). Corporate governance would have ensured directors and management acting in the best interests of the shareholders. Strong communication links were to have been established between all shareholders.

The concept proposal also took into consideration a strong value adding element, support for an export component and the creation of a strong brand to counter the effects of possible imports.

Please make reference to Appendix 3 (which details the concept proposal) and Appendix 4 (which consists of the presentation which was canvassed to growers).

At the conclusion of a significant period of grower visitation and the involvement of merchants (including a pitch at the Australian Banana Wholesalers AGM), the level of support for the concept developed was measured at 37% of production ~ considerably below the figure of 60-70% which had been reckoned necessary to affect change.

As a result the concept has been shelved at this time.

Reflecting on the process, it is the opinion of the IDO that the concept perhaps attempted to tackle too many issues at once and consequently was difficult for banana growers to fully grasp and reach a comfortable level of understanding. A similar concept involving growers also failed in the nineties due to a lack of commitment from the growers involved. A lesson from this latest study may well be that future 'big-picture' concepts should be introduced gradually to growers in order to effect the overall change necessary to beat the boom / bust cycle presently afflicting the industry.

A positive example of a concept which has been introduced over time and gaining greater acceptance within the industry is the Banana Crop Forecasting System; which is in the process of being implemented as a possible solution to avoiding the boom / bust cycle. The IDO has been, and will continue to be, instrumental in gaining the wider acceptance of the BCFS system with growers.

3)

Please make reference to Appendix 1 (consisting of the editions of *Banana News* - Volumes 1 – 16)

3 & 4)

The vast majority of North Queensland's banana growers were decimated by Cyclone Larry in mid March, 2006. As a result the major lobby groups directly related to the banana industry (Growcom, ABGC) co-coordinated a recovery process to bring back the industry in a timely fashion. This process led to the employment of an Industry Recovery Officer whose role was to engage with growers to facilitate their access to all the support (State, Federal and other agencies) they required to aid the recovery process.

Despite the devastation wrought by the cyclone event, it presented an opportunity for the IDO to foster greater leadership for the industry and act as an agent for change to encourage growers to think beyond their own farm-gate and consider the wider industry (and community) of which they are an integral part.

The boom / bust cycle had been a major legacy of the last cyclone which damaged the Innisfail area resulting in a major glut when all the production came on-line at the same time. With this in mind a major campaign was launched by AGBC in conjunction with Growcom and DPI&F to avoid the same situation. A series of meetings covering the major production areas including input from the IDO was swung into action to inform

growers of the options available to avoid all the production coming in at once, in other words how to stagger their crops.

The *Banana News* has been a very effective tool to disseminate recovery information to growers. The IDO worked in closely with all government agencies to ensure application forms and general information aimed at recovery was delivered to growers in a timely fashion.

In addition, the IDO has been working closely with three Industry Support Officers employed by Growcom to link growers with services essential to the recovery process.

The previously mentioned Banana Crop Forecasting System (a Growcom/QDPI&F project facilitated by HAL) that was rejected by growers in 2005 has now been recognised as a very important tool to aid the recovery process and quantify the time taken to recover and maintain a supply to the central markets. The information collated by the system will be vital in preparing for the next cyclonic event and the organisation of government aid packages for growers.

The BCFS program was fast tracked into a more “user friendly” version and a series of meetings set up across the production area to promote its uptake by growers. The IDO has been very active in promoting the program and spending much time on farm loading up the program and explaining its workings. This has enabled a further fine tuning of the program as problems with the software have arisen. The grower acceptance has been astounding and it effectively allows a grower to manage his production three months out from expected harvest. The grower can identify potential gluts three months from the event from which he can make an educated decision to nurse-sucker a portion of his production which has the effect of firstly reducing the glut and secondly potentially saving the grower 41% of costs involved in growing and marketing bananas.

The BCFS ‘re-birth’ and roll-out has been a good example of the IDO’s ability to deliver the training and learning skills necessary ‘on the ground’ to transfer information and provide tangible benefits to growers. However, the full affect of Tropical Cyclone Larry on the banana industry is not fully understood at this stage. It is presently thought that it will take a further two years for the industry to once again reach the full production achieved before the cyclone event.

The consideration of how cyclonic events such as TC Larry affect industry is well beyond the scope of the current Industry Development project. Growcom is working with QDPI&F and ABGC to undertake a needs analysis and the outcome of this work will be used to inform activities in the new project.

The main areas of positive industry impact as a result of the project are:

- Communications – the IDO provides industry specific information in a timely fashion for industry to react
- NRM awareness – an industry in north Queensland which is being seen as proactive in the area of natural resource management
- Day to day management – processing industry and grower requests which ultimately provides a platform for a sustainable industry. Farm visits are a very important role for the IDO to provide grower support

Technology Transfer

The project is largely communication based. A table outlining the industry events that the IDO has organised and/or attended either individually, or in conjunction with other parties is included in *Table 2*.

Table 3 provides an overview of the communication strategy developed by the IDO. The communications process was reviewed by the IDO management committee and there were no changes to be made.

Table 2:
Overview of industry events organised / attended by the IDO.

Activity	Details
Field Day – Interrow establishment - NRM	Patrick Leahy’s property – Tully, <i>August 2005</i> Looking at grassed interrow versus bare ground and the effect on runoff quality and quantity. QDPI&F involved.
Market tours	Sydney, Adelaide, Melbourne – <i>May 2005, February 2006</i> . Wholesale market tour to understand grower / merchant relationships
National Levy	ABGC National Levy Road show – Tully, Innisfail, Bundaberg, <i>June 2005</i> Accompanying ABGC and addressing growers about the IDO role
Banana Conference	The 6 th Australian Banana Congress, Cairns, <i>August 2005</i> Operated a stand at the family fun day delivering information to the public and growers. Assisted ABGC with organisation and information dissemination.
Value adding exercise	Bestlan Bananas meeting, <i>September 2005</i> . Steven Finch. Co-ordinate supplies of marked reject bananas to go into the drying business to produce powder for the export market
Labour issues – lack of local labour	Immigration workshop, <i>October 2005, March 2006</i> In conjunction with the Federal Department of Immigration – Glenda Hutch. Bringing skilled labour into the country.
Marketing	Australian Banana Wholesalers annual general meeting, Adelaide, <i>February 2006</i> Discussions with merchants / agents on the banana marketing concept and general marketing problems
Producer Demonstration Sites	Meetings held in Tully and Innisfail with select growers, <i>February 2006</i> Six growers selected to demonstrate good environmental practice in two growing areas, farm walks to follow. Stewart

	Lindsay – QDPI&F.
Activity	Details
Interstate Certification Assurance (ICA06)	Meeting held at Growcom offices, Brisbane, <i>February 2006</i> Input of grower point of view concerning leaf spot regulations.
Banana Special Interest Group	Meetings held throughout the year. IDO report on activities undertaken and industry roundup. IDO also took and distributed minutes from meetings.
Fertcare Workshop	FIFA workshop, South Johnstone, <i>March 2006</i> Industry representation on fertiliser practices evaluated from the NRM survey completed last year
Insurance Expo	CGU and NRMA insurance expo, Innisfail, <i>May 06</i> Banana promotion and ensuring industry support in conjunction with ABGC after Tropical Cyclone <i>Larry</i>
Production Scheduling	ABGC grower meetings, Innisfail and Tully, <i>May 2006</i> Addressed grower meetings to support production scheduling as a tool and notified growers of assistance packages available through the federal and state governments for cyclone relief.
Tully Floodplain Production Action Group	Monthly meetings, Tully, <i>December 2005 onwards</i> IDO member of the action group ensuring growers interests are looked after and having input into NRM issues facing banana growers in the Tully/Murray areas

Table 3:
Communication strategy for the banana industry

Medium	Previous adoption by banana industry	New Communication Strategy
Newsletter	Previously the banana industry was serviced by the QDPI publication “ <i>Banana Topics</i> ”, but due to funding shortage this quarterly publication has ceased	<i>Banana News</i> is a monthly newsletter mailed to all Queensland banana growers & edited by the IDO. The newsletter covers up to date news, activities and events and is generally 4 double sided A4 pages. The newsletter is mailed due to the limited number of growers utilizing e-mail, other industry members and the wider networks receive via e-mail. It is very well accepted by growers.
Email	Previously there was no strategy in place to email growers	The marketing group has been asked to communicate via email which has been successful. For quick communication email is useful, but there are a number of

		growers not willing to work with email.
Medium	Previous adoption by banana industry	New Communication Strategy
Radio interviews	Unknown	A regular radio spot on the ABC local radio occurred for a 6 month period. <i>Ad hoc</i> Radio interviews are conducted to get a message out quickly on a wide variety of subjects via <i>ABC Far North Queensland</i> , <i>ABC Country Hour</i> and 4KZ.
External magazine and press articles	Articles placed on an <i>as needs</i> basis	Articles are regularly provided for the <i>Fruit and Vegetable News</i> , <i>Australian Banana magazine</i> , <i>Good Fruit and Vegetables</i> and local newspapers – the <i>Tully Times</i> and <i>Innisfail Advocate</i> .
Key linkages DPI&F	Previously reported through <i>Banana Topics</i>	The <i>Banana News</i> is regularly used to inform banana growers of the outcomes and progress of DPI&F projects

Recommendations

As a result of the IDO project, the banana industry can be seen as pro-active in the area of environmental issues, which are evolving over time. As more information becomes available through governmental agencies identifying areas for improvement (eg the Cardwell Shire Floodplain Program), an IDO will be instrumental in ensuring the interests of banana growers are paramount and that the industry is informed of advances in the area which translates to on ground activities to achieve and exceed set targets.

Over the duration of the project, the IDO has created and maintained good linkages between government agencies and growers; a function which delivered significant benefit to growers during the cyclone recovery period and these linkages should be pursued into the next project to build on the good networks and relationships already fostered.

Excellent links have been established with ABGC and the two remaining Banana Grower local producer associations (LPAs) which facilitate the coordination within industry that is so vitally needed and will continue to be an ongoing concern. Such linkages enable the industry to identify and coordinate approaches to solve emerging issues, as well as those long-standing ones requiring widespread support and ultimately consensual agreement.

Ongoing support for, and distribution of, the Banana Crop Forecasting System is vital for the industry to gain ownership and control of the boom / bust cycle.

Follow up on growers who have indicated they will utilise the system and have not logged on so far will need to be completed. The success of the system relies on information coming in; the more growers involved, the more accurate the system is.

The IDO project has identified and proven that growers will not support a coordinated marketing approach under the conditions which existed prior to TC Larry; however, post cyclone, prevailing circumstances may be more conducive and further investigation is warranted.

An ongoing problem identified by the project is the shortage of skilled and unskilled labour available to the banana industry. As a recommendation, a coordinated approach with government departments (CentreLink, Choice Management, labour agencies, Dept. of Immigration) and the banana industry needs to be established.

The *Banana News* has been well established and received as the industry newsletter informing growers of relevant issues each month. It is a recommendation that the newsletter be continued to promote & foster further unity within the industry.

As a recommendation, more focus and effort is required in developing value adding for excess bananas to reduce the pressure on the central markets. If lower grade fruit can be directed away from the market place this will have the effect of reducing pressure during a boom cycle. In a not completely unrelated matter, power generation from banana waste has been earmarked for further work to ascertain its effectiveness; the IDO will help coordinate any on-ground activities and liaison as necessary.

Finally, the Banana Industry 5 year Strategic plan is up for renewal.

It is a recommendation that the IDO be involved in the process for the consultation and development of the next 5 year plan.

The project management committee supports the continuation of the banana IDO project.

A new project proposal has been developed and submitted to Horticulture Australia Limited and is awaiting full approval. The new project if approved will see the IDO operate on a 1 FTE basis, as with this project.

The purpose of the new project will be to build on the achievements to date and maintain momentum towards a sustainable industry.

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- Mr. John Tyas (Industry Services Manager, Horticulture Australia Ltd)
- Mr. Neville Pederson (Office Manager, Growcom Tully Office)
- Ms. Naomi King (Papaya IDO, Growcom)
- Mr. Jim Collings (Project Management Coordinator, Growcom)

Appendices

1. *Banana News* ~ Volumes 1 — 16

2. *Natural Resource Management Survey* —

2.1. *“Environmentally Friendly Farming” A Survey for Queensland Banana Growers*

2.2. *Banana Survey Results 28/06/05*

2.3. *Results vs. Targets (“Sustaining the Wet Tropics — A Regional Plan for Natural Resource Management 2004-08”. Draft, section 6.6.1)*

2.4. *Collated Responses by Question (1-25) ~ illustrated graphically*

3. *Banana Marketing* —

A New Direction (Concept Document)

4. *Banana Marketing* —

Presentation