

Facilitating the Development of the Queensland Apple Industry

Alex Livingstone
Growcom

Project Number: AP05005

AP05005

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AP05005

**Facilitating the Development of the Queensland
Apple Industry**

30 September 2008

**Alex Livingstone
Growcom**

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Project Purpose: This project aimed to continue to improve communication within the Queensland apple industry.

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1. Summary

This project aimed to continue to improve communication within the Queensland apple industry through the continued employment of an Industry Development Officer (IDO). Activities included; production of a monthly newsletter, sending of ad hoc information to growers as important issues arose, organisation of workshops and assisting local grower groups. High priority areas of action for the IDO included the need for orchard modification, water use efficiency and environmental sustainability.

From the above over-arching goal, several specific aims were devised:

1. *Progress strategic initiatives to help ensure a viable industry in the future*
2. *Increase industry unity, leadership and independence to develop sustainability*
3. *Increase business opportunities through network development giving growers more alternatives*
4. *Improve communication and extension of information so that growers can make informed decisions regarding their future*
5. *Development of a key stakeholder database to enable more effective communication*

The main activities undertaken throughout the project included:

- Development of an industry strategic plan
- Increasing industry cohesion, unity and knowledge by involving growers in key decisions
- Increasing communication within industry
- Attending and arranging industry meetings and orchard walks
- Facilitating increased involvement by the Stanthorpe Apple Committee in industry matters
- Coordinating grower tours
- Helping to coordinate industry consultation for key industry issues such as biosecurity, imports and orchard walks

The key outcomes from the project included the development of an industry strategic plan, the development of strong lasting industry networks for growers and greater industry knowledge through the *Future Orchards 2012* program (aimed at increasing Australian orchard efficiencies to an international standard). As a result the growing sector is communicating more effectively with other stakeholders and growers are becoming more united. The industry is also now in a position to plan for its own future in coordination with national and international strategies.

It is recommended that the IDO project be continued past September 2008 to provide industry with the resources to continue developing and plan effectively for its own future. Provisional approval has been given to the outline of a new IDO proposal and funds allocated accordingly. Throughout the next generation of this project, the IDO would again with working closely with growers and other stakeholders to secure the best outcomes for industry.

This project to date has greatly benefited industry in many ways including:

- A stronger sense of industry direction and cohesion. The local Stanthorpe Apple Committee has become more involved in local industry issues and has helped to facilitate more direct contact with the National Peak Industry Body (Apple and Pear Australia (APAL)) and the State Representative Body Growcom.
- More united grower groups and more informed stakeholders. This was facilitated through local grower meetings and more direct involvement from the Stanthorpe Apple Committee, APAL and Growcom.

- A more proactive and independent industry through ongoing support from the Stanthorpe Apple Committee, Growcom and APAL.
- Better links with the National Peak Industry body and raising the profile of the Queensland industry at a National level
- A more well-informed industry through exposure to experienced guest speakers at orchard walks, regular grower meetings relating to industry issues and a diverse and flexible communication strategy by the State representative body, Growcom. This communication strategy can be seen at Appendix 1 and includes the use of a variety of media.

The key learning from project AP05005 is that there needs to be continued investment in industry development. Given the significant challenges the industry faces into the future, it is vital that growers have as much support as possible.

Future support must be flexible and focused and if this can be managed it has great potential to alleviate significant industry hurdles and motivate critical industry progress, without onerous and cumbersome strategies that lack grass-roots engagement.

This support is vital if horticultural industries are to continue to adapt to shifting market conditions and prosper into the future.

2. Introduction

The Queensland apple industry is based in Stanthorpe. This region is one of the coldest in the state and thus is suitable for growing pome fruit which require a certain number of 'chill hours'. In 2007 there were approximately 67 growers in the region ranging from some of the most efficient and largest in Australia, to smaller hobby farmers. These orchardists grow most mainstream varieties of apples including (in order of harvest) Gala, Red Delicious, Granny Smiths, Fuji, Cripps Pink (otherwise known as Pink Ladys™) and Sundowners. Many of these growers also have varying percentages of their farm converted for stonefruit production.

Apple production was approximately 29,521 tonnes in 2007 (up from 25,347 in 2006). In order of production volumes, the main varieties were Granny Smith (24%), Red Delicious (26%) and Gala (20%). The main varieties making up new tree plantings in Queensland during 2007 were Cripps Red (48%), Cripps Pink (18%) and Granny Smith (22%).

The Queensland industry has invested heavily in advanced cultivation techniques, hail netting, grading, packing facilities and drip reticulation systems and has increased yields from 13.5 tonnes per hectare to 45 tonnes per hectare in the last 20 years. While all growers focus predominately on the fresh market, juice grade fruit is usually transported to the Golden Circle cannery for processing.

Apple and Pear Australia Ltd (APAL) is the national body for pome fruit. APAL liaises quite closely with all state bodies and funds much of the research and development work currently being undertaken. The Applethorpe based research station of the Queensland Department of Primary Industries and Fisheries (DPI&F) is also a major asset to the industry. Some of the research originating from this station has been ground breaking and its findings have been adopted across the world in some cases. Stanthorpe growers are extremely fortunate to have such a wealth of knowledge and experience nearby.

The Queensland apple industry is shrinking in grower numbers due in part to growers seeking retirement and increasing input pressures. However in regard to overall tonnage and tree numbers, production has remained steady. This is due to the remaining growers expanding their orchards, becoming more efficient and planting higher orchard densities. The growing base is extremely knowledgeable with in some cases four generations of experience behind the current orchardist.

Growcom first began to work with the Queensland apple industry through an IDO during project AP03021 – Assisting the Development of the Queensland Apple Industry which commenced in January 2004 and concluded in May 2005. Prior to AP03021 and AP05005 there was a major lack of effective communication and unity within the growing base.

This project was undertaken to continue to improve communication within the Queensland apple industry by continuing the employment of an Industry Development Officer (IDO). Activities included; production of a monthly newsletter, sending of ad hoc information to growers as important issues arose, organisation of workshops and assisting local grower groups. High priority areas of action for the IDO included the need for orchard modification, water use efficiency and environmental sustainability.

1. *Progress strategic initiatives to help ensure a viable industry in the future*
2. *Increase industry unity, leadership and independence to develop sustainability*
3. *Increase business opportunities through network development giving growers more alternatives*
4. *Improve communication and extension of information so that growers can make informed decisions regarding their future*
5. *Development of a key stakeholder database to enable more effective communication*

The significance of this project to industry was that with the IDO as a resource the growers could more efficiently feed their issues into the state and national representative bodies. This ensured more effective two way communication and grower engagement at all levels. The IDO was also able to facilitate more direct grower interaction with other stakeholders on a range of topics including succession planning, Industrial Relations, financial planning and orchard improvement/intensification.

Other related projects have included Future Orchards 2012 (FO2012). FO2012 was developed by APAL using funding from the Federal Government's "*Industry Partnerships Program*". This project was aimed at lifting the productivity of Australian apple and pear orchards to world competitiveness. The program started in July 2006 and ran through to June 2008.

AgFirst, a world leading consultancy company from New Zealand provided consult services for the project. The main drivers of this project were to lower orchard production costs per kilogram of fruit, to increase the percentage of premium fruit harvested and to bring Australian orchardists up to international competitiveness in domestic and export markets. As a part of this program, regular regional grower meetings were held with guest speakers from all over the world. The IDO was responsible for helping to coordinate these meetings and to ensure grower attendance.

The IDO also helped with the rollout of an Orchard Biosecurity Manual for the apple and pear industry by ensuring high levels of grower engagement from Stanthorpe.

The IDO worked closely with local grower organisations such as the Stanthorpe Apple Committee. This group consisted of five growers from the Stanthorpe area. The group met regularly with the IDO being responsible for coordinating these meetings. A range of topics were covered during these sessions such as Golden Circle issues, crop levels, water management and national industry issues.

3. Method

The Queensland apple industry used the services of an IDO to facilitate industry development. The IDO was employed on a basis of 0.4 FTE based from the Growcom Brisbane office. The IDO travelled to Stanthorpe as often as possible to facilitate face to face grower engagement.

The project was managed by a Steering Committee consisting of the five growers from the Stanthorpe Apple Committee and a Growcom representative. The Steering Committee met a minimum of twice a year to formulate and review the IDO's annual workplan. The IDO also had to complete on average two milestones a year to HAL guidelines and in line with the annual workplan.

Over the course of the project the IDO developed and maintained linkages with industry stakeholders, including growers, wholesalers, retailers, research bodies and the Golden Circle cannery. This group formed the IDO's main network and allowed for more accurate, efficient information transfer.



Left: Daniel Nicoletti, Stanthorpe Apple Committee Chairman and Alma Reynolds of APAL at a local grower meeting

In line with the original project aims, the IDO helped to develop an industry strategic plan with input from the major industry stakeholders. This document was closely aligned with the national strategic plan.

The IDO developed a practical communication strategy to ensure effective extension activities. This strategy differed in method depending on the target audience and topic. The IDO helped to coordinate and attended regular grower meetings. This was often done in conjunction with the FO2012 program. The IDO also met irregularly with other IDOs to maintain good working relationships within that network; thus ensuring meaningful communication with other horticultural industries and organisations.

To fulfil strategy 3, 4 and 5 of project AP05005 the IDO reviewed and maintained an industry database. Current contact information ensured effective and timely communications on a variety of issues including meeting dates and other key industry issues.

Right: AgFirst guest speaker Ross Wilson at an orchard walk at the Applethorpe DPI&F centre.

A priority role for the IDO was to keep the Steering Committee and the Stanthorpe Apple Committee informed of arising issues. This group was a key contact for industry stakeholders and it was vital that the growers be able to make informed judgments. In doing this the IDO helped with technology transfer events, facilitated meetings with service providers and researchers and helped to communicate the results of these activities to the wider industry.

The IDO was also heavily involved in Queensland promotional activities.





*Above Left: Diabetes Australia promotions at Queen Street Mall in Brisbane
Above Right: Apple Stall at the 2007 Brisbane Exhibition*



Above: Growcom fruit stall and trailer at the 2008 Stanthorpe Apple and Grape Festival

4. Activities

The activities undertaken during this project have been listed in the below table. Their relevance to the project aims has been documented. Only the most relevant and important activities have been listed below. Many of the day to day activities of the IDO have not been acknowledged.

Project Aims:

1. *Progress strategic initiatives to help ensure a viable industry in the future*
2. *Increase industry unity, leadership and independence to develop sustainability*
3. *Increase business opportunities through network development giving growers more alternatives*
4. *Improve communication and extension of information so that growers can make informed decisions regarding their future*
5. *Development of a key stakeholder database to enable more effective communication*

Project Aim	Activity	Output	Outcome
4,2	Industry communications plan	<ul style="list-style-type: none"> • Information, processes & tools to communicate activities, events, issues, outcomes & opportunities • Regular emails, faxes and a monthly newsletter 	<ul style="list-style-type: none"> • Increased industry knowledge & awareness amongst stakeholders • Improved industry engagement & participation in project activities • Increased feedback & interest in industry issues & opportunities
1,2,3,4	Facilitating regular Stanthorpe Apple Committee meetings	<ul style="list-style-type: none"> • Facilitated contact between industry leaders • Contact between industry researchers & leaders • Contact between service providers & leaders 	<ul style="list-style-type: none"> • Improved communication flow & unity within stakeholders • Presentation of information in a interactive & informative manner • Received direct feedback from industry leaders
2,3,4,5	Coordination of regional grower meetings	<ul style="list-style-type: none"> • As a part of the FO2012 project the IDO helped to facilitate regular grower meetings • Regular contact between local growers • Facilitated contact between growers & industry researchers • Facilitated contact between service providers & growers 	<ul style="list-style-type: none"> • Improved relationship development between growers, researchers & service providers • Presentation of news in an interactive & informative environment • Receipt of accurate & direct industry feedback • More open communication channels between industry & researchers & service providers
2,3,4,5	Coordination of grower tours	<ul style="list-style-type: none"> • Grower tour of the Brisbane Fresh Market meeting representatives from the wholesale markets • Regular farm/orchard tours 	<ul style="list-style-type: none"> • Improved networking & knowledge of the fresh market • Improved business skills & knowledge of possible opportunities

			<ul style="list-style-type: none"> Improved grower knowledge of other growing regions & techniques
1,2	Industry strategic planning	<ul style="list-style-type: none"> Development of an industry strategic plan Involvement from all industry sectors in the development of the plan Supporting the development of an Industry Biosecurity Plan Facilitated interaction between industry researchers & grower leaders Helped in the development of a pome fruit pest management strategy 	<ul style="list-style-type: none"> Ongoing identification of priority industry needs Regular development & redefinition of industry goals Continual actioning of strategies to advance industry
1,2,3,4	Training & group facilitation	<ul style="list-style-type: none"> Promotion of Chemcert training Promotion of succession planning workshops Coordination of regional grower meetings with guest speakers on topics such as orchard intensification Grower workshop on biosecurity matters 	<ul style="list-style-type: none"> Improved grower knowledge of Chemcert, biosecurity issues & succession planning Enhanced industry leadership & representative capabilities Industry empowered to take control of their own businesses
1,3	Professional development	<ul style="list-style-type: none"> Leadership training through the DPI&F Constant learning through involvement in the development of the Industry Strategic Plan & the Biosecurity Plan 	<ul style="list-style-type: none"> Resulting in a more competent & informed IDO who can more effectively deliver meaningful results to industry
1	Industry strategic research project development	<ul style="list-style-type: none"> Identification of industry research needs; specifically pest management 	<ul style="list-style-type: none"> Appropriately defined research projects Improved project management as a result of more direct interface
1,2,4	Facilitation of industry response	<ul style="list-style-type: none"> Facilitation & documentation of industry feedback on relevant issues Representation of regional needs & views at a national level 	<ul style="list-style-type: none"> Improved opportunities for stakeholder consultation on key industry issues & developments Enhanced industry representation due to more timely & meaningful feedback
1,4,5	Industry representation	<ul style="list-style-type: none"> Industry representation & participation at key events & meetings Communication of industry issues & project activities to a wider audience Network development 	<ul style="list-style-type: none"> Industry engagement in broader issues Improved responsiveness to wider industry threats & opportunities Increased knowledge of industry issues & project activities generated amongst others Increased IDO knowledge of industry stakeholders, issues,

			activities & opportunities for cooperative partnerships
2,3,4,5	Development & coordination of value chain meetings	<ul style="list-style-type: none"> Facilitated contact between growers, wholesalers & retail representatives 	<ul style="list-style-type: none"> Improved value chain relationship development Creation of opportunities for resolution of industry marketing issues Increased grower understanding of market requirements & functions Increased wholesaler & retailer understanding of farm management requirements & functions
4,5	Industry database maintenance	<ul style="list-style-type: none"> Updated grower contact information Updated production information 	<ul style="list-style-type: none"> Effective communication channels to growers & stakeholders Successful participation in industry events & activities Accurate industry profile to be communicated to relevant bodies Accurate representation of industry
1,5	Maintenance of research & government linkages	<ul style="list-style-type: none"> Regular contact with research staff & government personal Receipt of key government agency communications 	<ul style="list-style-type: none"> Participated in research project planning Effective & efficient technology transfer of current industry & government funded projects Improved responsiveness to legislative change
2,4,5	Maintenance of industry information resources	<ul style="list-style-type: none"> Maintenance of communication channels & announcement of relevant research articles 	<ul style="list-style-type: none"> Improved access to information on technical research outside the current industry network Promotion of valuable new information resources to industry
1,2,3	Industry promotion	<ul style="list-style-type: none"> Participation in the 2007 National Diabetes Week – distributed apples & pears to the public at Queen Street Mall Brisbane Participation in the Apple Stall at the Brisbane Exhibition in 2006, 2007 & 2008 Coordination of industry involvement in the 2008 Stanthorpe Apple and Grape Festival Helped with the organisation of a stall at the local 2008 Stanthorpe Show 	<ul style="list-style-type: none"> Resulting in a more informed public More grower involvement in activities – allowing growers to take more initiative & to create promotional opportunities

5. Evaluation

The success of the project was evaluated using a statement from the IDO Steering Committee. The project was reviewed against the aims below:

This project was undertaken to continue to improve communication within the Queensland apple industry by continuing the employment of an Industry Development Officer (IDO). Activities included; production of a monthly newsletter, sending of ad hoc information to growers as important issues arise, organisation of workshops and assisting local grower groups. High priority areas of action for the IDO included the need for orchard modification, water use efficiency and environmental sustainability.

From the above over arching goal, several specific aims were devised:

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- 2. Increase industry unity, leadership and independence to develop sustainability*
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- 5. Development of a key stakeholder database to enable more effective communication*

Steering Committee Statement

The following statement was provided by the IDO Steering Committee:

“The IDO project has been an invaluable asset to our industry. Without someone employed in this position to oversee all industry issues, growers simply would not be as well informed and would not have had the chance to make informed business decisions. The current communication strategy has worked extremely well and all growers have been kept well informed about relevant industry issues and have certainly had the chance to have input into the decision making process either through the Stanthorpe Apple Committee or APAL. However, while growers have been kept well informed they cannot seem to be properly engaged. They thus far have been very unwilling to get involved in their industry beyond their own farm gate. This is an issue faced at a national level as well and industry leaders need to work together to help address it and get more growers actively involved in their representative bodies. The IDO during this project has worked to try and get higher involvement levels but this a slow process.

The orchard walks have been extremely informative for growers and have helped to greatly lift production efficiencies for the area. The IDO has been instrumental in helping to coordinate these events.

The IDO is invaluable in helping Queensland growers to liaise more closely with the Peak Industry Body APAL. This in turn has helped to lift Queensland’s profile at a national level. The IDO has an excellent working relationship with APAL.

The only aspect of the role which needs improving is the work load the Steering Committee sets. The IDO does not get utilised enough despite the IDO being a willing participant throughout all aspects of the role. This will be rectified in the future.”

Table 3 lists the outcomes of the program and relates them to the appropriate project aim.

Table 3. IDO Project Aims and Outcomes

Project Aim	Outcome
4	More informed grower groups
2	More unity and more lasting networks both within the grower groups but also between growers and other stakeholders
1,3,4	More recognition of industry from government organisations
1	A much better understanding of biosecurity issues
1,2	More leadership and independence from industry
4	More positivity amongst industry
2,3	More networking
4	Better facilitated grower meetings
1,4	A better informed industry leadership body & and state representative body

“Given these outcomes all five aims of project AP05005 have been met satisfactorily. Industry certainly recognises the need to continue the IDO project beyond September 2008. As all growers who sit on industry committees and boards also have their own businesses to run, time is scarce and an IDO is needed to be working in the background to ensure effective follow through and improved communication. Industry fully supports the IDO project and programs like it”.

IDO Steering Committee:

Mr Daniel Nicoletti – Growcom Apple Committee Chairman
Mr Ugo Tomasel
Mr Dino Rizzato
Mr Memo Mattiazzi
Mr Fred Baronio

6. Implications

This project has further demonstrated the importance of industry led initiatives. By ensuring a strong level of involvement from industry stakeholders in planning and development there is a far more lasting sense of ownership and responsibility within the networks. With the knowledge and experiences from this project laying in several hands across the industry it is more likely that further developments will be made within the apple industry building off the structure of, and results from, the IDO project; this is key as one of the main aims of the project was to promote industry unity, leadership and independence.

There are significant changes and challenges ahead of the industry; for example imports, biosecurity threats and rising input costs. There is a strong need for continuous information exchange and leadership development. The Stanthorpe Apple Committee and the IDO have fantastic networks to build on.

The positives and negatives within the industry are numerous. As the key decision makers (Growcom and the Stanthorpe Apple Committee) have been involved in the development of the industry strategic plan the group is very aware of their own strengths and limitations and the challenges industry faces. The group and the IDO have worked to constructively communicate this information to the wider growing base with the goal of uniting everyone. The backbone of this industry and this project is the strong network currently in place. It ensures grassroots representation at all levels and has worked extremely effectively in building the industry's independence and experience in the long term.

Table 4 gives a brief example of some of the industry's strengths, weaknesses, opportunities and threats. These points are strongly linked to the Queensland Apple Industry Strategic Plan (see Appendix 2).

Table 4. Industry Strengths, Weaknesses, Threat and Opportunities

Strengths	Weaknesses
Comprehensive pest/disease surveillance system in place	Aging grower base
Packhouses do compete thus there is no monopoly & growers have a choice of which packhouse to supply	Strong competition within growing sector – no one is willing to cooperate
National industry	Reliance on GCL
Individual growers have extensive industry knowledge	Lack of product differentiation
Overseas experience is being shared through FO2012	Some growers do not have an accurate idea of the true cost of production
Strong & well funded leadership body	Retailer knowledge is poor
Supply currently equals demand	Limited number of proactive younger growers
Excellent product quality	
Extensive R&D knowledge within DPI&F	
Strong presence in local market	
Geographic industry concentration	
Opportunities	Threats
Consumption can be greatly increased	Power of supermarket chains
New product development	Imports & Biosecurity issues
Strengthening branding & differentiation in the market place	Climate change
Collaboration with other industries – state body	Urbanisation as farms come in more and more

who services all of Queensland horticulture	contact with urban centres
Changing consumer requirements for 'meal assembly'	Loss of grower base & critical mass
Alternative supply chain options	Government legislation without industry consultation or knowledge may lead to the implementation of unworkable policies
Possible mechanisation of key on farm activities	No secure water supply
Smartfresh™ technology – improved product consistency	Rising input costs
Geographic concentration of industry & opportunity for collaboration	GCL instability

Industry can only benefit from the strong network it currently has in place. By being more aware of their threats and opportunities growers can make more informed decisions regarding their future. The industry can utilise the information and support base generated during project AP05005 in the future.

The key learning from project AP05005 is that there needs to be continued investment in industry development. Given the significant challenges the industry faces into the future, it is vital that growers have as much support as possible. Future support must be flexible and focused and if this can be managed it will have great potential to alleviate significant industry hurdles and motivate critical industry progress, without onerous and cumbersome strategies that lack grass-roots engagement. This support is vital if horticultural industries are to continue to adapt to shifting market conditions and are to prosper in the future.

7. Recommendations

As stated above, a great deal of ground work has been completed through project AP05005 designed to stabilise the industry and to create a lasting, workable framework for the future. Given the uncertain future the industry is facing, it is vital that the current support mechanisms be continued and improved if possible in line with potential developments and changes.

It is highly recommended that the IDO project be continued past September 2008 and industry supports this proposal (refer to the Steering Committee Statement). Provisional approval has been given to a new IDO proposal and provisional funds allocated accordingly. The purpose of the new project would be to advance the issues that have been identified and the opportunities that have been presented in project AP05005. The project would be built on the foundation of prior industry development programs that have fostered a high level of industry experience and knowledge. This understanding and collective intent would be leveraged to implement targeted initiatives aimed at fostering specific positive changes.

The goals of the renewed project (AP08027) are as follows:

1. Improved industry communication and adoption of new technologies, in particular modern orcharding systems.
2. Improved environmental performance of the QLD apple industry.
3. A more cohesive industry with improved knowledge of varietal performance, research outcomes and market place requirements.
4. The identification of issues throughout industry and the processes in place to develop strategies appropriate to address issues like these.
5. Improved information transfer to and from growers and other industry sectors about priorities, progress in meeting priorities and projects being conducted.

Services delivered would target industry-level and business-level change that will directly enhance the competitiveness, initiative and leadership of the Queensland apple industry. Allowing growers to make informed decisions regarding their future is fundamentally necessary for industry to positively respond to increased import competitiveness, altered trading conditions under the Horticulture Code of Conduct, biosecurity changes and rising input costs. The industry must move forward and to take ownership and responsibility for its own future. The IDO must specifically be involved in helping industry to prepare for fundamental changes to their current operating environment.

8. Acknowledgements

The following people were significantly involved in the IDO project:

- Jan Davis Growcom CEO
- Rachel Mackenzie Growcom Operations Manager
- George McDonald Growcom Industry Services Manager
- Jim Collings Growcom Contracts Coordinator
- Ray Palmer Growcom Apple Industry Development Officer 2005-2006
- Ugo Tomasel Queensland Apple Committee & Apple and Pear Australia Board Member
- Bruno Stefanon Queensland Apple Committee
- Daniel Nicoletti Queensland Apple Committee Chairman
- Fred Baronio Queensland Apple Committee
- Memo Mattiazzi Queensland Apple Committee
- Dino Rizzato Queensland Apple Committee
- Brad Mills HAL Industry Services Manager

9. Bibliography

1. Queensland Apple Industry Strategic Plan
2. IDO Renewal Application AP08027

10. Appendices

Communication plan

One of the founding goals of project AP05005 was the development of a practical and relevant industry communication plan. Prior to this project there was no regular independent communication reaching all growers in the industry. It was thought that the communication plan should be a simple process accessible to all stakeholders. The communication must also obviously be two way to enable the IDO to act on issues both from the growing sector and directly involving it. Using these guides the following communication activities were implemented.

Channels	Communication Strategy
Newsletter	Monthly newsletter detailing current industry news and meeting notices. Columns from the Stanthorpe Apple Committee Chairman have at times been included in the newsletter. This was aimed at allowing more direct communication from that group.
Fax outs	Usually specific information such as meeting notices. This medium was particularly important in establishing direct, fast contact as many growers do not have email access.
Meetings & workshops	Regular meetings held both with the Stanthorpe Apple Committee and other growers. These meetings were designed to keep the growing sector informed and to encourage direct interaction between growers, researchers and service providers.
Surveys	Industry and issue specific mechanisms used to collect direct feedback from growers. The results from these surveys were used to improve project facilitation.
Press	Articles provided regularly to Fruit and Vegetable News Monthly column in the national industry magazine the Australian Fruitgrower
Project management meetings	Regular project management meetings incorporated project activity, reviews and approval of annual workplans.
Key linkages	Linkages are maintained with industry researchers and extension staff across Australia
E-Newsletters	Regular e-newsletters are sent to industry stakeholders with summary information on industry news and events
Promotional activities	Involvement in promotional activities to communicate relevant industry news and benefits to the public

Queensland Apple Industry Strategic Plan

This plan has been developed by as part of Horticulture Australia Limited Project AP05005 'Facilitating the Development of the Queensland Apple Industry'.

A national apple strategic plan has been developed as part of the first phase of the Apple Industry Partnerships Program. As the issues of national importance have already been addressed, this plan outlines strategies needed for the Queensland apple industry to maximise its opportunities and strengths, and overcome its threats and weaknesses.

Industry's Vision

As per the national apple and pear strategic plan the Queensland apple industry's vision is:

To be economically and environmentally sustainable, striving to improve its competitiveness in cost and product quality

Plan Objectives

This plan aims to assist the Queensland industry to achieve the objectives listed in the national apple and pear strategic plan, taking into account specific local differences.

Industry SWOT

Strengths

- Eating quality of our apples. The high light intensities that Queensland enjoys make for apples sweeter than found anywhere else in the world
- Presence in the market: Stanthorpe apples are well known in the local market. Most Queenslanders know about Stanthorpe apples
- Geographic concentration of industry: because the Queensland industry is almost exclusively confined to the Granite Belt, communication and collaboration between growers is easier to facilitate than in states where the industry is scattered
- The core of the industry are family farms. These enterprises are committed to the industry and add to its stability

Weaknesses:

- Shelf life: recent drought years have impacted upon the image of Stanthorpe apples as not having optimum keeping qualities
- Lack of product differentiation: whilst most Queenslanders know about Stanthorpe apples, when they make their purchases, they do not know if they are buying Queensland apples or fruit from southern states, because many growers do not identify fruit as being from Stanthorpe because of chain store branding policies

- Some growers do not have an accurate picture of their costs of production. Growers who are unknowingly selling fruit for less than the cost of production reduce the viability of the whole industry

Opportunities:

- Collaboration with other horticultural industries. Queensland produces a third of Australia's horticultural produce. Being closer to this concentration of horticultural production, and having a state peak body servicing all of horticulture gives the Queensland industry an advantage regarding collaboration with producers of other horticultural crops
- Collaboration: the geographic closeness of the industry gives opportunities for collaboration between growers
- *Smartfresh™* technology offers an opportunity to improve the consistency of the consumer eating experience and help overcome the negative image of the keeping quality of stanhope fruit
- Investigate alternative supply chain options
- Develop added-value products especially local manufacturing
- Strengthen branding and differentiation in the market

Threats:

- Rationalisation of the supply base: as major retailers continue their trend to deal with fewer and fewer suppliers, small to medium family farms will find it harder to access these markets
- Security of water supply: the Queensland apple industry is based in an area where there is no regulated supply of irrigation water. The climate is also variable, with drought events being common
- Climate change: as global temperatures rise, the Granite Belt will become more marginal as a growing area for deciduous fruits as warmer temperatures reduce the quantity of chill that trees receive
- Imports from New Zealand. The *New Zealand Jazz™* apple is already being grown in NSW
- Loss of local juicing customer (*Golden Circle*)

Strategies :

In order to remain competitive, growers will need to collaborate. Individual family farms lack the economies of scale to survive in a business environment where customers demand larger volumes from fewer suppliers.

The industry needs to continue to innovate. Whilst the Queensland apple industry has a good record of adopting new technology such as hail netting, this needs to be maintained and expanded.

- New varieties more suited to marginal chill requirements

- New crops need to be considered if in the future apples prove to be non-viable due to factors outside of the industry
- New markets and products. With the national apple market largely saturated, and export opportunities limited, the Queensland industry needs to exploit all available markets and develop new opportunities to sell apples or new apple products
- New, low cost hail netting systems and high density plantings can increase the quality of packed fruit and reduce costs, particularly labour and the requirement for skilled labour

Branding: there has been significant investment in advertising and promotion of Stanthorpe apples, however this needs to be transferred and connected with the actual product, so as consumers are aware of what they are buying.

Assistance and education to improve the level of business management skills in the industry. An improved level of business management skills would increase the professionalism and competitiveness of the industry.

Actions

<i>Item</i>	<i>Description</i>	<i>By Whom</i>	<i>Completion Date</i>
Collaborative business structures	Investigate and develop new business structures	Growcom	January 07
New Varieties	Find new varieties more suited to marginal chill requirements	HAL/QDPI	2015
Diversification	Identify other crops suitable for diversification	Growcom/HAL/QDPI	January 2008
Supply Chain	Investigate alternative supply chain options and new markets	Growcom	January 2007
Added Value Products	Investigate options for value adding especially local manufacturing	Local processors/ Growcom	
Security of Water Supply	Develop an irrigation plan	DNRM/ Growcom Land & Water/ Stanthorpe community reference panel	
Lower Cost of Production	Investigate methods to lower production costs including hail netting, high density	APAL	June 2008

	planting etc.		
Increase business management skills	Develop an education needs analysis and develop an education program utilising available grants such as <i>FarmBiz</i>	Growcom	August 2006