12th World Deciduous Canned Fruit Conference South Africa

John Wilson
Fruit Growers Victoria

Project Number: CF13700

CF13700

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CANNED FRUITS INDUSTRY COUNCIL OF AUSTRALIA

FINAL REPORT

12th World Deciduous Canning Fruit Conference

Stellenbosch South Africa March 2014

PROJECT NUMBER:	CF13700 (7/02/2014)
PROJECT TITLE:	World Deciduous Canned Fruit Conference (“CANCON12), South Africa Study Tour
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Index

Cover Page	*1*
Index	*2*
Project Purpose	*3*
Media Summary	*4*
Conference Program – Schedule	*5*
Conference Program – Conference	*6*
Conference Program – Argentina Report	*7*
Conference Program – Australia Report	*8*
Conference Program – Chile Report	*9*
Conference Program – China Report	*10*
Conference Program – Greece Report	*12*
Conference Program – South Africa Report	*13*
Conference Program – Spain Report	*15*
Conference Program – U.S.A. Report	*16*
Conference Program – Tours	*18*
Summary and Recommendations	*20*

Dr Rob Davies, Minister for Trade and Industry in the South African government, gives his opening address.

PROJECT NUMBER:	CF13700

PROJECT LEADER:

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REPORT PURPOSE:

The purpose of this Final Report; of the study tour to the 12th World Deciduous Canning Fruit Conference (“CANCON12”) held in Stellenbosch, Western Cape, South Africa in March 2012; was to gain; knowledge of world deciduous canned fruits production information, worldwide contacts and provide a brief synopsis of how the world canned deciduous fruit industry currently views itself.

The information contained herein will be of assistance to planners, government and industry. It provides a concise summary of the state of the world canned deciduous fruits industry.

FUNDING:

The study tour was funded by voluntary contributions by the Fruit Growers Victoria Limited (“FGVL”) and the Victoria Peach and Apricot Growers Association (“VPAGA”) (which together form the Australian Canning Fruitgrowers Association (“ACFA”) which is the grower member of CFICA) with matched levy funding by the Australian Government through Horticulture Australia Limited (“HAL”).

REPORT DATE:

31st May 2014

A South African peach orchard at Ceres in Western Cape Province

Media Summary

Since 1992, the World Canned Deciduous Fruits Conference has been held approximately every 2 years, alternating between northern and southern hemispheres. The 12th World Deciduous Canning Fruit Conference ("CANCON12") was held in Stellenbosch, Western Cape, South Africa in March 2014. The most recent previous conferences were held in Greece in May 2012, Xuzhou, China in 2010 and in Shepparton, Australia in 2009.

These conferences were originally convened by the World Canned Deciduous Fruits Council ("WCDFC") as a forum to share information on; crops, planting/removal trends, field yields, fruit prices, factory production capabilities, production, factory yields, sales, import/export, stock holdings, etc.

The WCDFC comprises nine member countries: Argentina, Australia, Chile, China, Greece, Italy, Spain, South Africa and USA, with China joining recently and Italy largely inactive now.

Each country's peak industry body is represented, and have shared what they are able to do. Most have been forthcoming. Australia does not share information in relation to sales, import/export and carry out stocks because our industry is only one processor, but others do.

The Australian delegation representing the Canned Fruits Industry Council of Australia was Mr Ivan Routley and Mr John Wilson. Mr Routley is a CFICA councillor, ACFA Chairman, a member of the VPAGA committee of management and orchardist. Mr Wilson is the FGVL general manager and secretary for both ACFA and CFICA.

No representatives of Australia's sole processor of deciduous fruit, SPCA, attended Cancon12 as SPCA determined that it could not release key staff because Cancon12 was being held during its peak fruit intake period.

Delegations from each member country made presentations to an audience of over 200 people, including delegates and others from around the world including non member countries. Attendees also came from, Japan, Canada, Italy and Germany.

The delegations shared information on their costs for cans, factory labour and sugar. Importantly, they also shared information on their seasons' outcomes for the current year

The delegates were told that there has been widespread weather damage to all southern hemisphere crops and that the USA 2013 crop was drought affected. Argentina lost 80% of its peach crop to frost and Chilean crop was down 48%. The South African crop is down ~30% due to frost (5% loss) which was followed by unseasonal heavy rain approaching harvest (25% loss).

As a consequence, there will be a ~30% shortfall of processed peach production compared to demand for the 2014. This will continue for at least 6 to 8 months until the northern hemisphere crop is processed. However the USA crop is forecast to be down again in 2014 as growers move to alternative crops (almonds & walnuts). This has led to canners offering 20 year contracts for new plantings.

The fruit shortage has meant that processors have had to increase their prices to cover costs.

The Argentineans have significantly increased their prices to their retailers. They are yet to determine the effect of this on consumer demand; however they believe that the Argentinean market will be under supplied.

The Greeks said they have also increased their prices and they were the most concerned about the flow on effects of price increases.

The South Africans also stated that they have increased their prices to their retailers and they are yet to determine the effect of this on consumer demand. Despite their shortage the South Africans questioned whether there was a possibility that the current Argentinean tariff could be suspended whilst the domestic supply could not meet demand.

There have been significant increases in prices paid for fruit over the last 3 years in all other countries. Fruit prices in Chile have increased over 100%. Prices for fruit for processing in Greece and Spain are now above those of Australia. The SA price has increased by 62% over 3 years.

The Argentine processors paid $US900 per tonne for fruit this season ($US500 for pulp) because fresh fruit was also affected by the weather and in short supply. If this had not been done their production would have been less than 20% of normal for 2014 as a proportion of the remaining crop would have been diverted to the fresh market.

Following the country reports the South African hosts provided a presentation on the SA “Supercan” campaign which they claim significantly increased domestic consumption. And then there was a spirited discussion on tariffs

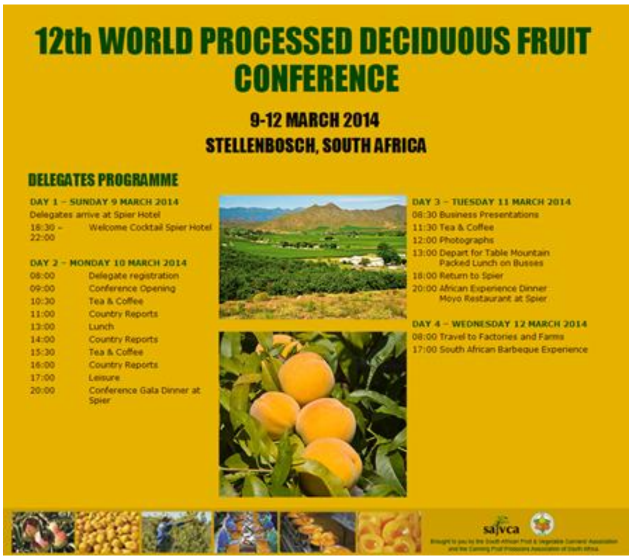
The Greek canners insisted that their industry was no longer receiving subsidies, but they conveniently ignored the fact that the growers now receiving an “environmental payment” which could be interpreted as a disguised subsidy. They claimed that the Victorian government grant to SPC Ardmona was effectively a tariff despite hearing in the previous presentation that development grants could not be considered as tariffs under WTO rules.

There was also a short presentation by CTI, an innovative Italian manufacturer of industrial machines for fruit processing.

The master of ceremonies for Cancon12 was Mr Anthony Dicey who is an orchardist and the chairperson of the Canning Fruit Producers Association of South Africa.

Cancon13 will be held in Argentina in March 2016.

Conference Program



Conference

The Conference commenced with welcome function which allowed participants to meet informally, adjust jet lags and rest. Most delegates had not met in face to face situation since Cancon11 in Greece.

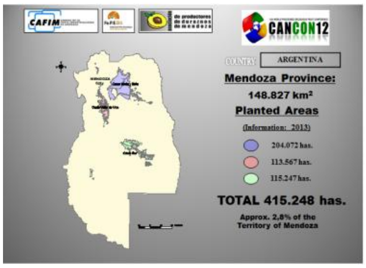
Cancon12 was officially opened by a ribbon cutting ceremony following a speech by Dr Rob Davies who is Minister for Trade and Industry in the South African government. Dr Davies spoke about the importance of growing industry and the development of international trade.

Cancon12 Opening Ceremony

The various delegates then presented their country reports in alphabetical order with the exception of the host country, South Africa, which was last to report.

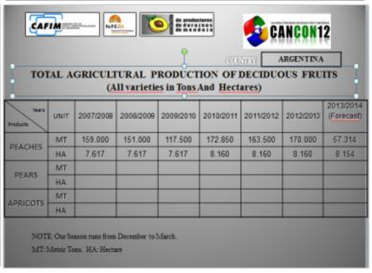
Cancon12 delegates listen to a country report

ARGENTINA Country Report



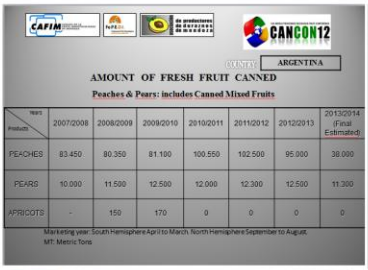
OASIS	TOTAL HAS.	FORECAST PRODUCTION TONS.	GROSS PRODUCTION PER HA.	BEARING HAS.	BEARING HAS PRODUCTION PER HA.
NORTH - EAST	1.319	10.201	7,73	1.319	7,73
VALLE DE UCO	3.741	35.364	9,45	3.741	9,45
SOUTH	3.095	11.749	3,79	3.095	3,79
TOTAL MZA.	8.154	57.314	7,03	8.154	7,03
				100%	

PEACHES PROCESSED	50.000
% OVER FORECAST	



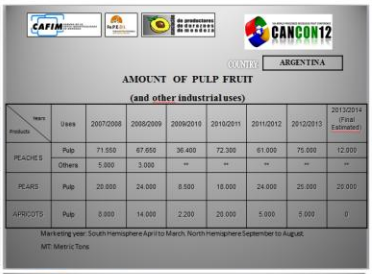
Products / Years	UNIT	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Forecast)
PEACHES	MT	159.000	151.000	117.500	172.850	163.500	170.000	57.314
	HA	7.617	7.617	7.617	8.160	8.160	8.160	8.154
PEARS	MT							
	HA							
APRICOTS	MT							
	HA							

NOTE: Our Season runs from December to March.
MT: Metric Tons. HA: Hectare



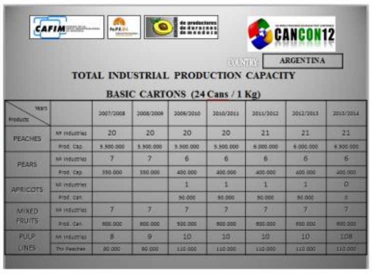
Products / Years	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Final Estimated)
PEACHES	83.450	80.350	81.100	100.550	102.500	95.000	38.000
PEARS	10.000	11.500	12.500	12.000	12.300	12.500	11.300
APRICOTS	-	150	170	0	0	0	0

Marketing year: South Hemisphere April to March. North Hemisphere September to August.
MT: Metric Tons

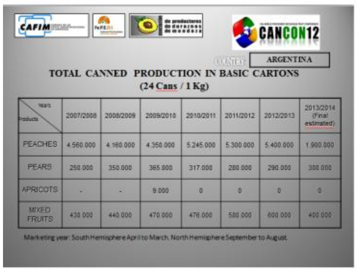


Products / Years	Uses	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Final Estimated)
PEACHES	Pulp	71.550	67.650	36.400	72.300	61.000	75.000	12.000
	Others	5.000	3.000	**	**	**	**	**
PEARS	Pulp	20.000	24.000	8.500	18.000	24.000	25.000	20.000
APRICOTS	Pulp	8.000	14.000	2.200	20.000	5.000	5.000	0

Marketing year: South Hemisphere April to March. North Hemisphere September to August.
MT: Metric Tons

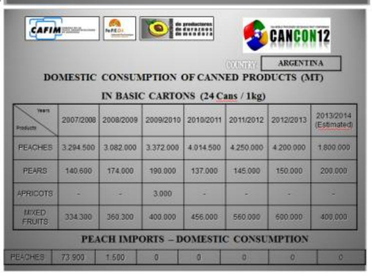


Products / Years		2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014
PEACHES	Nº Industries	20	20	20	20	21	21	21
	Prod. Cap.	5.900.000	5.900.000	5.900.000	5.900.000	6.000.000	6.000.000	6.000.000
PEARS	Nº Industries	7	7	6	6	6	6	6
	Prod. Cap.	350.000	350.000	400.000	400.000	400.000	400.000	400.000
APRICOTS	Nº Industries			1	1	1	1	0
	Prod. Cap.			50.000	50.000	50.000	50.000	0
MIXED FRUITS	Nº Industries	7	7	7	7	7	7	7
	Prod. Cap.	800.000	800.000	800.000	800.000	800.000	800.000	800.000
PULP LINES	Nº Industries	8	9	10	10	10	10	10
	Thn Peaches	80.000	80.000	110.000	110.000	110.000	110.000	110.000



Products / Years	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Final estimated)
PEACHES	4.560.000	4.160.000	4.350.000	5.245.000	5.300.000	5.400.000	1.900.000
PEARS	250.000	350.000	365.000	317.000	280.000	290.000	300.000
APRICOTS	-	-	9.000	0	0	0	0
MIXED FRUITS	430.000	440.000	470.000	476.000	500.000	600.000	400.000

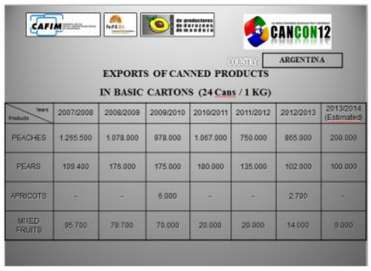
Marketing year: South Hemisphere April to March. North Hemisphere September to August.



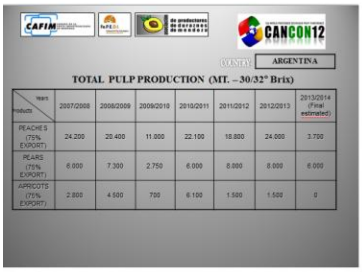
Products / Years	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Estimated)
PEACHES	3.294.500	3.082.000	3.372.000	4.014.500	4.250.000	4.200.000	1.800.000
PEARS	140.600	174.000	190.000	137.000	145.000	150.000	200.000
APRICOTS	-	-	3.000	-	-	-	-
MIXED FRUITS	334.300	360.300	400.000	455.000	560.000	600.000	400.000

PEACH IMPORTS – DOMESTIC CONSUMPTION

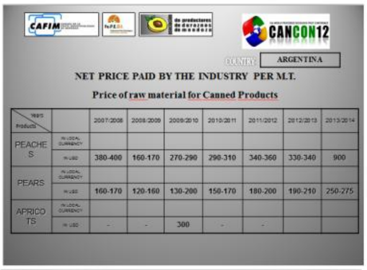
PEACHES	73.900	1.500	0	0	0	0	0



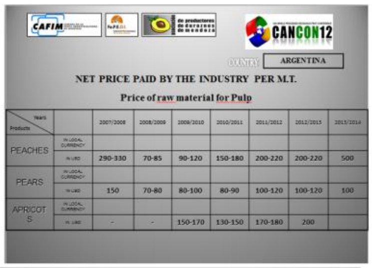
Products / Years	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Estimated)
PEACHES	1.265.500	1.078.000	978.000	1.067.000	750.000	865.000	200.000
PEARS	109.400	176.000	175.000	180.000	135.000	102.000	100.000
APRICOTS	-	-	6.000	-	-	2.700	-
MIXED FRUITS	95.700	79.700	70.000	20.000	20.000	14.000	9.000



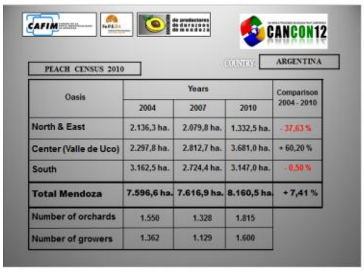
Products / Years	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014 (Final estimated)
PEACHES (75% EXPORT)	24.200	20.400	11.000	22.100	18.800	24.000	3.700
PEARS (75% EXPORT)	6.000	7.300	2.750	6.000	8.000	8.000	6.000
APRICOTS (75% EXPORT)	2.800	4.500	700	6.100	1.500	1.500	0



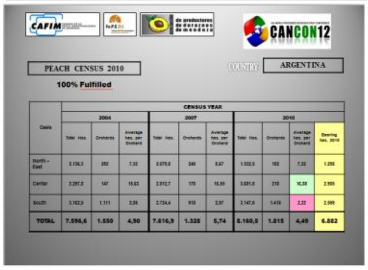
Products / Years		2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014
PEACHES	IN LOCAL CURRENCY							
	IN USD	380-400	160-170	270-290	290-310	340-360	330-340	900
PEARS	IN LOCAL CURRENCY							
	IN USD	160-170	120-160	130-200	150-170	180-200	190-210	250-275
APRICOTS	IN LOCAL CURRENCY							
	IN USD	-	-	300	-	-		



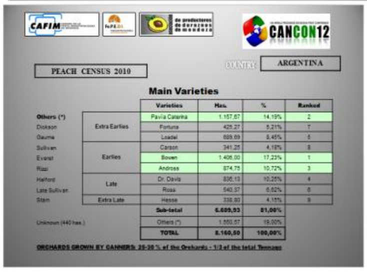
Products / Years		2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014
PEACHES	IN LOCAL CURRENCY							
	IN USD	290-330	70-85	90-120	150-180	200-220	200-220	500
PEARS	IN LOCAL CURRENCY							
	IN USD	150	70-80	80-100	80-90	100-120	100-120	100
APRICOTS	IN LOCAL CURRENCY							
	IN USD	-	-	150-170	130-150	170-180	200	



Oasis	Years 2004	2007	2010	Comparison 2004 - 2010
North & East	2.136,3 ha.	2.079,8 ha.	1.332,5 ha.	- 37,63 %
Center (Valle de Uco)	2.297,8 ha.	2.812,7 ha.	3.681,0 ha.	+ 60,20 %
South	3.162,5 ha.	2.724,4 ha.	3.147,0 ha.	- 0,50 %
Total Mendoza	7.596,6 ha.	7.616,9 ha.	8.160,5 ha.	+ 7,41 %
Number of orchards	1.550	1.328	1.815	
Number of growers	1.362	1.129	1.600	



Oasis	CENSUS YEAR 2004 Total Has.	2004 Orchards	2004 Average has. per Orchard	2007 Total Has.	2007 Orchards	2007 Average has. per Orchard	2010 Total Has.	2010 Orchards	2010 Average has. per Orchard	Bearing has. 2010
North – East	2.136,3	292	7,32	2.079,8	240	8,67	1.332,5	182	7,32	1.250
Center	2.297,8	147	15,63	2.812,7	170	16,55	3.681,0	210	16,08	2.903
South	3.162,5	1.111	2,85	2.724,4	918	2,97	3.147,0	1.418	2,22	2.599
TOTAL	7.596,6	1.550	4,90	7.616,9	1.328	5,74	8.160,5	1.815	4,49	6.882



		Varieties	Has.	%	Ranked
Others (*)	Extra Earlies	Pavia Catarina	1.157,67	14,19%	2
Dickson		Fortuna	425,27	5,21%	7
Gaume		Loadel	689,69	8,45%	5
Sullivan	Earlies	Carson	341,25	4,18%	8
Everst		Bowen	1.406,00	17,23%	1
Rizzi		Andross	874,75	10,72%	3
Halford	Late	Dr. Davis	836,13	10,25%	4
Late Sullivan		Rosa	540,37	6,62%	6
Stam	Extra Late	Hesse	338,80	4,15%	9
		Sub-total	6.609,93	81,00%	
Unknown (440 has.)		Others (*)	1.550,57	19,00%	
		TOTAL	8.160,50	100,00%	

ORCHARDS GROWN BY CANNERS: 25-30 % of the Orchards - 1/3 of the total Tonnage

The Argentina country report was presented by Roberto Lamm. He spoke about the difficulties that the Argentine industry was experiencing as result of disastrous weather events. He said that the Argentinian 2014 peach drop is expected to be only 34% of the 2013 crop with tonnages dropping from 170,000 to 57,300 tonnes. The lowest peach production in the last 6 years was 151,000 so the Argentine industry is facing an unprecedented situation.

Roberto Lamm

The 66% decrease in on farm production is reflected in processed production with total cartons of processed fruit expected to the 54% below 2013 levels.

AUSTRALIA Country Report

The Australian country report was presented by Ivan Routley. Australian processing fruit production will also show a significant reduction of approximately 35% in 2014 compared to 2013 but for an entirely different reason. This is a result of a planned reduction in fruit intake by SPCA following the collapse of its domestic market share the previous year. The market share was lost to foreign imported processed fruit as a result of the strong buying power of the Australian dollar.

SPCA responded to this serious situation by culling approximately half of its suppliers and reducing quotas for the rest. They also sought a safeguard action under WTO rules and launched an anti-dumping case. These legal actions were either unsuccessful or had limited success.

Despite this SPCA was very successful in its campaign to encourage the Australian retailers to be patriotic. All of the major retailers have now all committed to only Australian fruit in their house brands.

The plight of SPCA received much publicity and the Australian media took great interest in the desperate circumstances of the Australian orchardists who were bulldozing and burning fruit trees. The outcome has been an unprecedented response from the Australian consumers with significantly increased sales of Australian product.

SPCA is currently seeking extra fruit in 2014 to service the extra demand.

SPCA and Victorian Government have committed to a $100 million+ upgrade of the SPCA Shepparton factory complex.

Ivan Routley presents the Australia Country Report

12th WORLD PROCESSED DECIDUOUS FRUIT CONFERENCE

CANCON12

9th–12th March 2014 Spier, South Africa

Country Report

Australia

COUNTRY : Australia

Australian Delegation

representing the Australian Canning Fruitgrowers Association

Ivan Routley
Chairman
Australian Canning Fruitgrowers Association

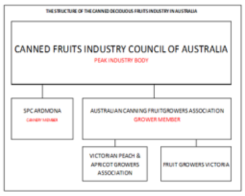
John Wilson
General Manager
Fruit Growers Victoria Limited

SPC Ardmona has declined to participate in Cancon12 – all data provided hereafter is subject to confirmation by the Australian manufacturer(s)

COUNTRY : Australia

Australian Delegation

representing the Australian Canning Fruitgrowers Association



COUNTRY : Australia

Australian Industry Snap Shot up to April 2013

SIAL October 2008:	Supply = Demand
Cancon09:	Supply 1,000,000 > Demand
$AUD:	Climbs to $US1.07 (now $0.89)
Australia Govt Policy	Cost of living
SPCA:	Market Share contracted
April 2013:	SPCA rationalises supply

COUNTRY : Australia

Australian Industry Snap Shot since April 2013

Productivity Commission	Safeguard Action NOT SUCCESSFUL
Productivity Commission	Anti Dumping PARTLY SUCCESSFUL
Retailers	Aussie Loyalty SUCCESSFUL
Redevelopment Grants	Australian Govt NOT SUCCESSFUL
	Victorian Govt SUCCESSFUL
Media	Consumer Response HIGHLY SUCCESSFUL

COUNTRY : Australia

Australian Industry Snap Shot since April 2013

- There has been an unprecedented response from the Australian consumer.
- The major retailers have all committed to Australian fruit in their house brands
- Demand has increased and SPCA is currently seekin extra fruit in 2014
- SPCA and Victorian Govt have committed to a $100 million+ upgrade

COUNTRY : Australia

Australian Industry Snap Shot

Now

COUNTRY : Australia

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS #
All varieties in hectares (ha)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	ha	2,297*	2,297*	2,127	2000*	Not available
Pears	ha	3,689*	3,689*	3,342	3000*	Not available
Apricots	ha	610*	610*	494	450*	Not available

All Australian data subject to verification by the manufacturer(s) * estimated

COUNTRY : Australia

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS #
All varieties in metric tons (mt)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	41150	36115	39520	45000*	Not available
Pears	mt	67500*	42000*	72800*	67000*	Not available
Apricots	mt	6200*	5700*	5100*	5700*	Not available

All Australian data subject to verification by the manufacturer(s) * estimated

COUNTRY : Australia

Agricultural Production : Canning

FRESH FRUIT PROCESSED FOR CANNING #

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	31843	27851	30751	25852	Not available
Pears	mt	19152	19046	24251	16947	Not available
Apricots	mt	3635	3871	3484	4900	Not available

All Australian data subject to verification by the manufacturer(s) * estimated

COUNTRY : Australia

Agricultural Production : Canning

FRESH FRUIT PROCESSED FOR CANNING #

Forecast 2014 Fruit Intake – Initial Season Outlook (April 2013) **

SINCE REVISED

Year		PEACH		PEAR		TOTAL	
		Tonnes	Change %	Tonnes	Change %	Tonnes	Change %
2008	Actual	40277		31242		71519	
2009	Actual	39160	-3%	28499	-9%	67659	-5%
2010	Actual	31843	-19%	19152	-33%	50995	-25%
2011	Actual	27851	-13%	19046	-1%	46897	-8%
2012	Actual	30751	10%	24251	27%	55002	17%
2013	Actual	25852	-16%	16947	-30%	42799	-22%
2014	Forecast	13000	-50%	9000	-47%	22000	-49%

** Source: ACFA Submission to Australian Productivity Commission Inquiry 2013

All Australian data subject to verification by the manufacturer(s) * estimated

COUNTRY : Australia

Deciduous Fruit Pricing Indicators

FARM GATE FRUIT PRICES – LOCAL CURRENCY #
Average per metric ton

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	588	574	525	535	Not available
Pears	404	347	322	341	Not available
Apricots	724	708	708	693	Not available

All Australian data subject to verification by the manufacturer(s) * estimated

COUNTRY : Australia

Deciduous Fruit Pricing Indicators

FARM GATE FRUIT PRICES IN US DOLLARS #
Average per met ton

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	554	601	534	534	Not available
Pears	380	411	341	341	Not available
Apricots	682	735	712	712	Not available

All Australian data subject to verification by the manufacturer(s) * estimated

COUNTRY : Australia

Production : Canning

TOTAL CANNING PRODUCTION #
Basic Cartons: 24 Cans x A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	903855	777126	877951	736700*	Not available
Pears	361505	360363	433040	448550*	Not available
Apricots	219942	294970	278023	39200*	Not available
Total	1485302	1432459	1589014	1224450*	Not available

All Australian data subject to verification by the manufacturer(s) * estimated

CHILE Country Report

The Chilean Country report was presented by Roberto Murphy. He related similar current season circumstances to Argentine although not quite as devastating. Chile also experience unprecedented frost which caused widespread damage. The Chilean peach crop is expected to be down by 44% in 2014 (278,000 tonnes) compared to 2013 (156,000 tonnes).

The Chilean processors have increased their peach farm gate prices for suppliers from between $US280 and $US320 to between $US400 and $US510 per tonne.

12th WORLD PROCESSED DECIDUOUS FRUIT CONFERENCE

CANCON12

9th–12th March 2014 Spier, South Africa

Country Report

CHILE

COUNTRY : CHILE

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS
All varieties in hectares (ha)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	ha	10.100	9.800	9.500	9.300	9.300
Pears	ha					
Apricots	ha					

COUNTRY : CHILE

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS
All varieties in metric tons (mt)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	mt	233.000	285.000	274.000	278.000	156.000
Pears	mt					
Apricots	mt					

COUNTRY: CHILE

Agricultural Production : Canning

FRESH FRUIT PROCESSED FOR CANNING

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	mt	97.000	98.000	98.000	117.000	61.000
Pears	mt					
Apricots	mt					

COUNTRY: CHILE

Agricultural Production : Pulp

FRESH FRUIT PROCESSED FOR PUREE / CONCENTRATES

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	mt	118.000	174.000	161.000	148.000	87.000
Pears	mt					
Apricots	mt					

COUNTRY : CHILE

Deciduous Fruit Pricing Indicators

FARM GATE FRUIT PRICES – LOCAL CURRENCY.
Average per metric ton – Thousands CLP

Products	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	103	110	135	180	230/300
Pears		81	80	80/100	80/100
Apricots		95	100	140	200

COUNTRY : CHILE

Deciduous Fruit Pricing Indicators

FARM GATE FRUIT PRICES IN US DOLLARS
Average per met ton

Products	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	189	230	276	280/320	400/510
Pears		170	163	150/180	150/180
Apricots		200	204	260	380

COUNTRY : CHILE

Production : Canning

TOTAL CANNING PRODUCTION
Basic Cartons: 24 Cans x A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	4.955.000	5.144.000	4.960.000	4.800.000	2.925.000
Pears					
Apricots					
Mixed Fruit	344.000	580.000	600.000	615.000	285.000

COUNTRY : CHILE

Production : Pulp

TOTAL ASEPTIC PRODUCTION (PULP/PUREES)
(Metric Tons: 28 / 32 Brix)

Products	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	40.000	51.000	54.000	49.500	29.000
Pears	23.500	25.500	24.000	27.000	27.000
Apricots	2.300	2.000	1.800	2.000	500

COUNTRY : CHILE

Processed Deciduous Fruit

CANNED FRUIT EXPORTS
Basic Cartons : 24 Cans X A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	3.450.000	3.370.000	3.000.000	3.280.000	1.530.000
Pears					
Apricots					
Mixed	300.000	515.000	525.000	470.000	304.000
Total					

COUNTRY : CHILE

Processed Deciduous Fruit

CANNED FRUIT DOMESTIC CONSOMPTION
Basic Cartons : 24 Cans X A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14 E
Peaches	1.299.492	1.502.538	1.304.569	1.604.061	1.370.000
Pears					
Apricots					
Mixed	38.579	64.975	67.000	65.990	55.000
Total					

COUNTRY : CHILE

Processed Deciduous Fruit

NET PRICE PER TIN A2½ EASY OPEN

Unit	2009/10	2010/11	2011/12	2012/13	2013/14 E
Local Currency					
In USD					

CHINA Country Report

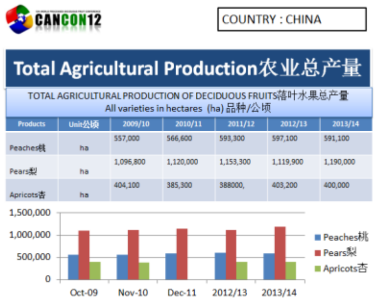
China is the largest producer of processed fruit in the world by a significant margin but the majority of its production is consumed domestically. Total tonnage of fruit in process exceeds 27 million tonnes. Most of the orchards and factories are predominantly in Anhui Province.

The vice president of the China Canned Foods Industry Association Xixi Moon told Cancon12 that fruit intakes increased by 20% in 2013/14 compared to 2012/13. Peach intake was 9,120,000 tonnes compared to 8,190,000 tonnes in 2012/13 (up 11%), pear intake grew from 12,480,000 tonnes to 16,000,000 tonnes (up 28%) and apricot intake went from 1,827,000 tonnes to 1,900,000 (up 4%).

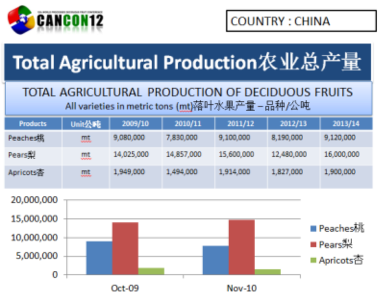
These growth figures were viewed as estimates by the Cancon community because of an understanding of the difficulty of collecting exact data in China were there are approximately 900 factories. Even so China remains the major processed fruit producer in the world.

Farm gate prices for fruit were reported as $US430, $US360 and $US390 for peaches, pears and apricots respectively

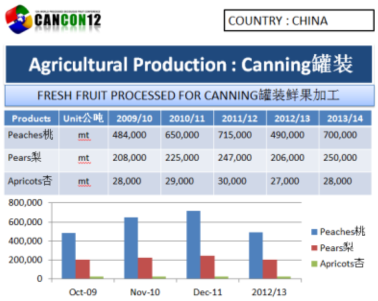
The Chinese delegation was the largest foreign delegation at Cancon12.



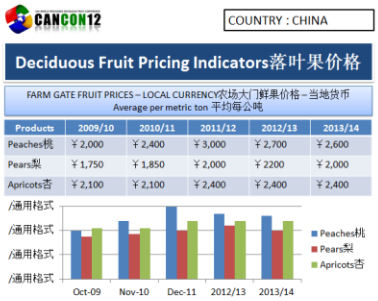
Products	Unit公顷	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	ha	557,000	566,600	593,300	597,100	591,100
Pears梨	ha	1,096,800	1,120,000	1,153,300	1,119,900	1,190,000
Apricots杏	ha	404,100	385,300	388000,	403,200	400,000



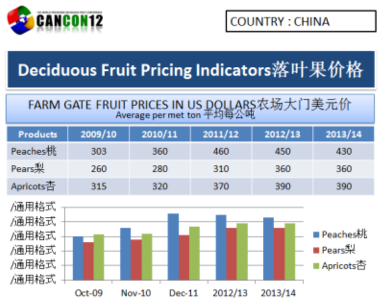
Products	Unit公吨	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	mt	9,080,000	7,830,000	9,100,000	8,190,000	9,120,000
Pears梨	mt	14,025,000	14,857,000	15,600,000	12,480,000	16,000,000
Apricots杏	mt	1,949,000	1,494,000	1,914,000	1,827,000	1,900,000



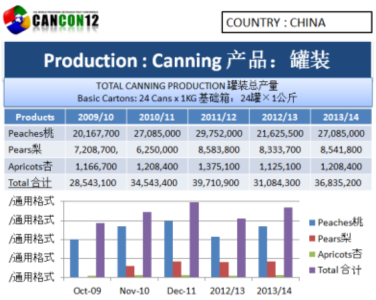
Products	Unit公吨	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	mt	484,000	650,000	715,000	490,000	700,000
Pears梨	mt	208,000	225,000	247,000	206,000	250,000
Apricots杏	mt	28,000	29,000	30,000	27,000	28,000



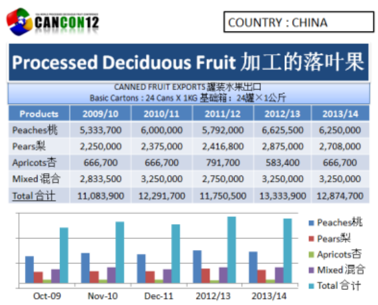
Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	￥2,000	￥2,400	￥3,000	￥2,700	￥2,600
Pears梨	￥1,750	￥1,850	￥2,000	￥2200	￥2,000
Apricots杏	￥2,100	￥2,100	￥2,400	￥2,400	￥2,400



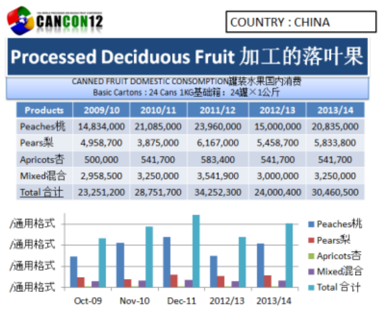
Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	303	360	460	450	430
Pears梨	260	280	310	360	360
Apricots杏	315	320	370	390	390



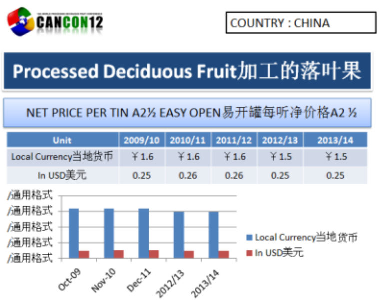
Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	20,167,700	27,085,000	29,752,000	21,625,500	27,085,000
Pears梨	7,208,700,	6,250,000	8,583,800	8,333,700	8,541,800
Apricots杏	1,166,700	1,208,400	1,375,100	1,125,100	1,208,400
Total 合计	28,543,100	34,543,400	39,710,900	31,084,300	36,835,200



Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	5,333,700	6,000,000	5,792,000	6,625,500	6,250,000
Pears梨	2,250,000	2,375,000	2,416,800	2,875,000	2,708,000
Apricots杏	666,700	666,700	791,700	583,400	666,700
Mixed 混合	2,833,500	3,250,000	2,750,000	3,250,000	3,250,000
Total 合计	11,083,900	12,291,700	11,750,500	13,333,900	12,874,700



Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches桃	14,834,000	21,085,000	23,960,000	15,000,000	20,835,000
Pears梨	4,958,700	3,875,000	6,167,000	5,458,700	5,833,800
Apricots杏	500,000	541,700	583,400	541,700	541,700
Mixed混合	2,958,500	3,250,000	3,541,900	3,000,000	3,250,000
Total 合计	23,251,200	28,751,700	34,252,300	24,000,400	30,460,500



Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Local Currency当地货币	￥1.6	￥1.6	￥1.6	￥1.5	￥1.5
In USD美元	0.25	0.26	0.26	0.25	0.25

GREECE Country Report

Costas Apostolou, the CEO of the Greek Canners Association, told Cancon12 that Greek peach production was down 44% from 311,000 tonnes to 175,000 tonnes. Again this was due to adverse weather conditions on the growing season.

As a result of the shortage farm gage prices had increased by approximately 20% across the board. The prices paid for peaches ranged from $US440 to $US480, Pears ranged from $US533 to $US933 and Apricots ranged from $US346 to $US373.

Greek exports are expected to be down approximately 7% in the current season.

Mr Apostolou advised that all subsidies have now been withdrawn from the Greek industry. This statement was met with scepticism.

He also advised that the Greek processors have increased their wholesale prices to retailers. They are anxiously waiting to see if there is any negative effect on domestic consumption from the flow on effects of price increases.

12th WORLD PROCESSED DECIDUOUS FRUIT CONFERENCE

CANCON12

Country Report

GREECE

CANCON12 COUNTRY : GREECE

CANCON12 COUNTRY : GREECE

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS
All varieties in hectares (ha)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	ha	21.200	19.500	17.200	15.100	15.000
Pears	ha					
Apricots	ha					

CANCON12 COUNTRY : GREECE

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS
All varieties in metric tons (mt)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	420.000	400.000	366.000	440.000	220.000
Pears	mt					
Apricots	mt					

CANCON12 COUNTRY : GREECE

Agricultural Production : Canning

FRESH FRUIT PROCESSED FOR CANNING

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	280.000	256.000	280.000	311.000	175.000
Pears	mt					
Apricots	mt					

CANCON12 COUNTRY : GREECE

Agricultural Production : Pulp

FRESH FRUIT PROCESSED FOR PUREE / CONCENTRATES

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	95.000	107.500	45.300	70.600	25.000
Pears	mt					
Apricots	mt					

CANCON12 COUNTRY : GREECE

Deciduous Fruit Pricing Indicators

FARM GATE FRUIT PRICES – LOCAL CURRENCY
Average per metric ton (industry cost)

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches €	180	200	250	250	330-360
Pears €	230	230	350	380	400
Apricots €	320	400	400	200-220	260-280

CANCON12 COUNTRY : GREECE

Production : Canning

TOTAL CANNING PRODUCTION
Basic Cartons: 24 Cans x A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	10.500.000	10.900.000	12.100.000	13.500.000	7.800.000
Pears					
Apricots	500.000	900.000	820.000	600.000	450.000
Total					

CANCON12 COUNTRY : GREECE

Production : Pulp

TOTAL ASEPTIC PRODUCTION (PULP/PUREES)
(Metric Tons: 28 / 32 Brix)

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	28.000	42.400	25.500	43.200	19.000
Pears					
Apricots					

CANCON12 COUNTRY : GREECE

Processed Deciduous Fruit

CANNED FRUIT EXPORTS
Basic Cartons : 24 Cans X A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	233.000	274.000	275.000	280.000	Estimate 260.000
Pears					
Apricots					
Mixed					
Total					

CANCON12 COUNTRY : GREECE

Processed Deciduous Fruit

CANNED FRUIT DOMESTIC CONSUMPTION
Basic Cartons : 24 Cans X A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	7.500	7.500	7.500	7.000	8.500
Pears					
Apricots					
Mixed					
Total					

CANCON12 COUNTRY : GREECE

Processed Deciduous Fruit

NET PRICE PER TIN A2½ EASY OPEN

Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Local Currency	0,200	0,180	0,190	0,190	0,200
In USD					

SOUTH AFRICA Country Report

The South African report was presented in two parts. The first part was presented by Wiehahn Victor, CEO of the South African Canning Producers Association. The second part was presented by Jill Attwood-Palm, CEO of the South African Fruit & Vegetable Canners Association.

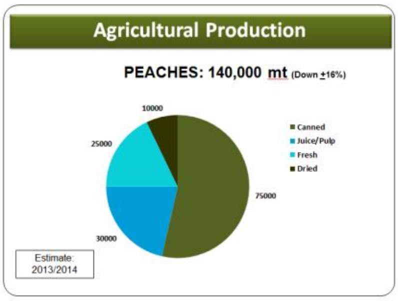
Mr Victor advised that there has been a reduction of approximately 1000 hectares of peach plantings over the last 6 years. The have also been reduction of planted area for pears and apricots of approximately 400 hectares in the same time period.

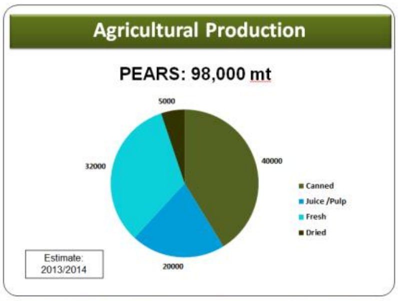
The 2014 crop has been affected by adverse weather in the growing season and as consequence South African processed fruit production will be reduced by approximately 19% in 2014.

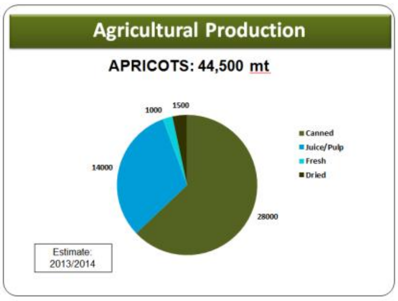
The tonnage of peaches processed is expected to be approximately 75,000 tonnes (a reduction of 23%), pears tonnage is expected to be 40,000 tonnes (down 12%) and apricot tonnage is expected to be 28,000 tonnes (down 8%).

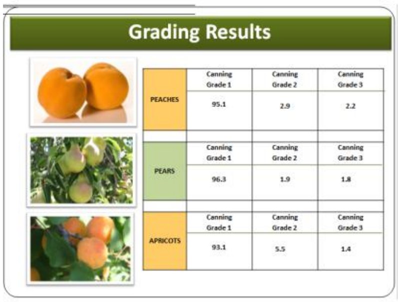
Ms Attwood-Palm confirmed that production will be down 19% from 6,122,770 cases of fruit to 4,980,000.

South African host, Wiehahn Victor, tentatively pats a cheetah.

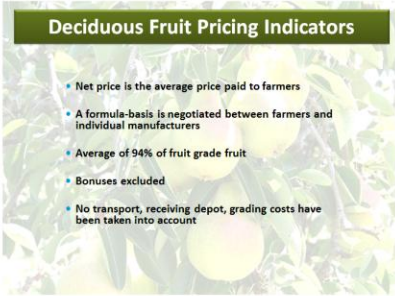


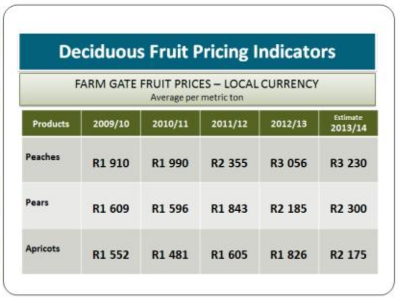




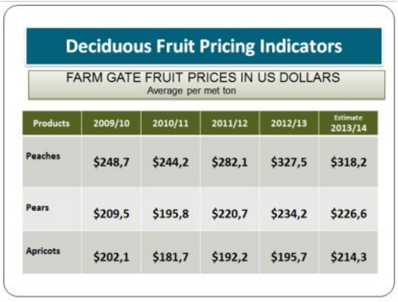


	Canning Grade 1	Canning Grade 2	Canning Grade 3
PEACHES	95.1	2.9	2.2
PEARS	96.3	1.9	1.8
APRICOTS	93.1	5.5	1.4

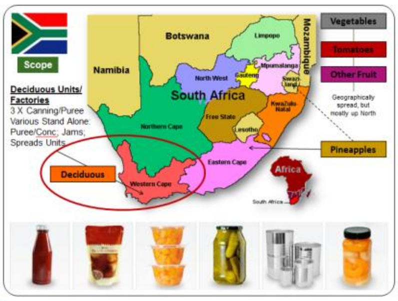


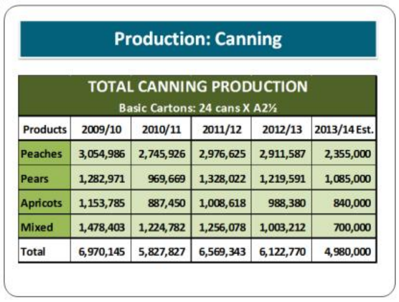


Products	2009/10	2010/11	2011/12	2012/13	Estimate 2013/14
Peaches	R1 910	R1 990	R2 355	R3 056	R3 230
Pears	R1 609	R1 596	R1 843	R2 185	R2 300
Apricots	R1 552	R1 481	R1 605	R1 826	R2 175

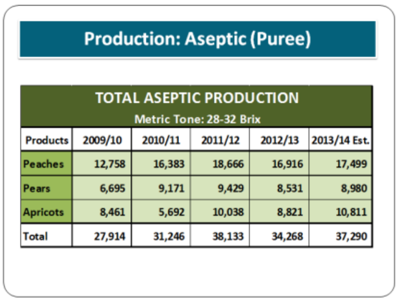


Products	2009/10	2010/11	2011/12	2012/13	Estimate 2013/14
Peaches	$248,7	$244,2	$282,1	$327,5	$318,2
Pears	$209,5	$195,8	$220,7	$234,2	$226,6
Apricots	$202,1	$181,7	$192,2	$195,7	$214,3



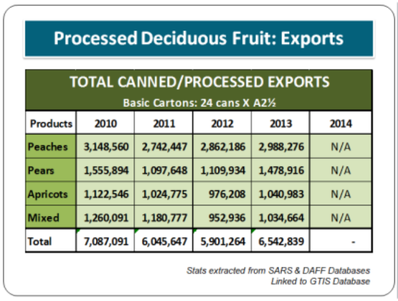


Products	2009/10	2010/11	2011/12	2012/13	2013/14 Est.
Peaches	3,054,986	2,745,926	2,976,625	2,911,587	2,355,000
Pears	1,282,971	969,669	1,328,022	1,219,591	1,085,000
Apricots	1,153,785	887,450	1,008,618	988,380	840,000
Mixed	1,478,403	1,224,782	1,256,078	1,003,212	700,000
Total	6,970,145	5,827,827	6,569,343	6,122,770	4,980,000



Production: Aseptic (Puree)

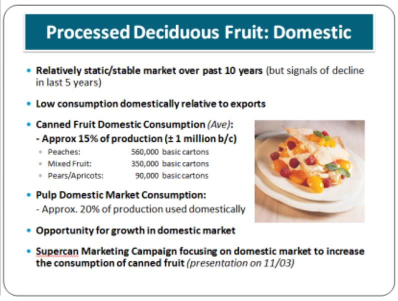
TOTAL ASEPTIC PRODUCTION Metric Tone: 28-32 Brix					
Products	2009/10	2010/11	2011/12	2012/13	2013/14 Est.
Peaches	12,758	16,383	18,666	16,916	17,499
Pears	6,695	9,171	9,429	8,531	8,980
Apricots	8,461	5,692	10,038	8,821	10,811
Total	27,914	31,246	38,133	34,268	37,290

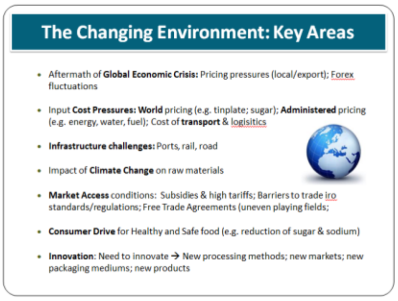


Processed Deciduous Fruit: Exports

TOTAL CANNED/PROCESSED EXPORTS Basic Cartons: 24 cans X A2½					
Products	2010	2011	2012	2013	2014
Peaches	3,148,560	2,742,447	2,862,186	2,988,276	N/A
Pears	1,555,894	1,097,648	1,109,934	1,478,916	N/A
Apricots	1,122,546	1,024,775	976,208	1,040,983	N/A
Mixed	1,260,091	1,180,777	952,936	1,034,664	N/A
Total	7,087,091	6,045,647	5,901,264	6,542,839	-

Stats extracted from SARS & DAFF Databases
Linked to GTIS Database





SPAIN Country Report

The Spanish Country Report followed the trend of the other country reports stating that they expect a reduction in fruit production of 10% because of weather anomalies. The peach intake was reported to be down 12% from 98,000 tonnes to 86,578 tonnes, the pear intake was reported to be marginally up to 15,492 tonnes and the apricot intake was reported to be 4,500 tonnes (no prior comparison).

The price per tonne paid for peaches was $US466, the price for pears was $US412 and the apricot price was also $US412.

The Spanish report was made by Mr Antonio Garcia.

The Spanish delegation to Cancon12

UNITED STATES Country Report

The United States report was presented by Mr Monte Griffiths. He reported a 37% decrease in peach plantings since 2004. There has been as steady trend to convert peach orchards to nut orchards in California. As a result processors are giving long-term contracts for new peach plantings.

Increased labour costs are a considerable contributor to this trend.

The American peach intake was reported at 330,527 tonnes for peaches. This is marginally down (-1%) from last year (333,802) but considerably down on the 481,000 tonne intake 10 years ago.

Another concern for the American industry is that supermarket sales volume for canned peaches has declined 32% over a 7 year period.

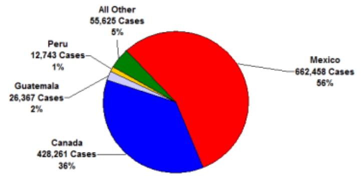
Pear intake in 2013 was 400,000 tonnes. This is an increase of 2.5% on the previous year (390,000 tonnes) which was a severe drought year. Pear production has been showing a slow decline over the last ten years.

Apricot intake has shown a 65% decrease since 2004 with a 36% decrease in plantings. The 2013 intake was 45,900 tonnes which was a 13% reduction on the previous year (52,500 tonnes).

Farm gate prices, paid to growers, were $US386 for peaches, between $US379 and $US293 for pears and $US485 for apricots.

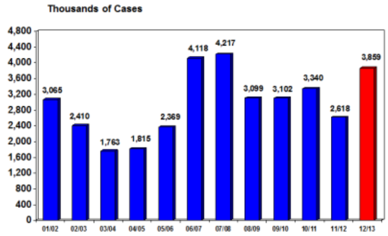
Monte Griffiths presents the US report

U. S. Canned Peach Exports
2012/13 Marketing Year

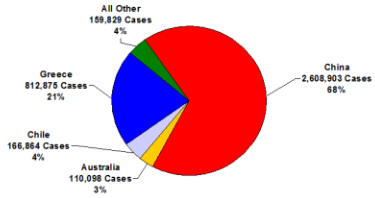


Marketing Year Total: 1,185,454 Cases (- 8%)

U.S. Canned Peach Import Trends
2002 - 2013

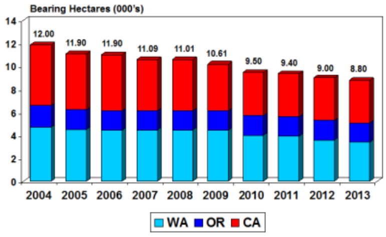


U. S. Canned Peach Imports
2012/13 Marketing Year

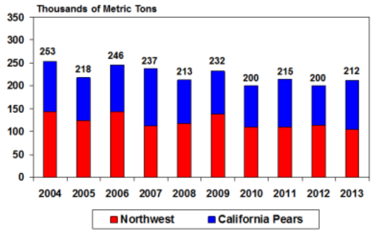


Marketing Year Total: 3,858,569 Cases (+47%)

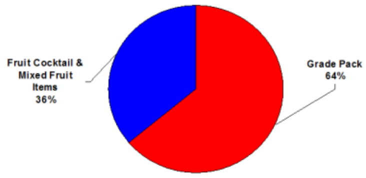
West Coast Bartlett Pears
Bearing Hectare Trends
2004 - 2013



West Coast Pear Delivery Trends
Volume Utilized for Canning

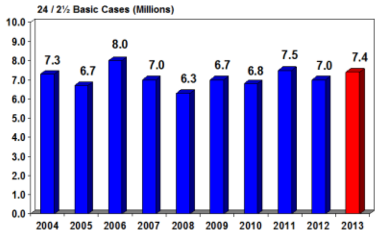


Utilization of West Coast Canned Pear Tonnage

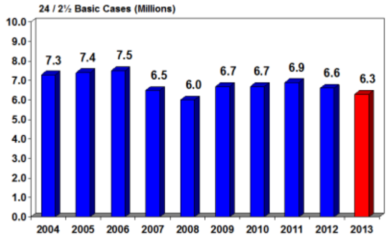


Total 2013 Deliveries: 212,000 MetricTons

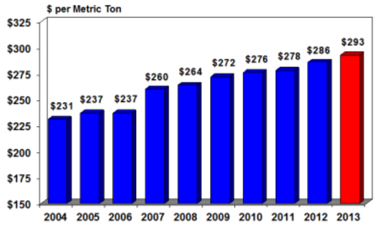
West Coast Canned Bartlett Pear Pack Trends
2004 - 2013



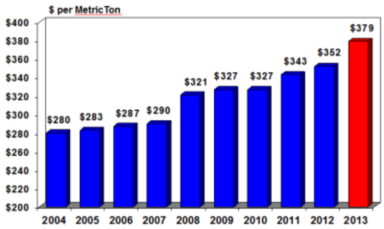
West Coast Canned Bartlett Pear Sales Trends
2004 - 2013



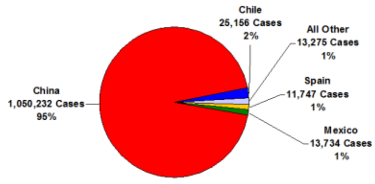
Northwest Canning Pear Price Trends
Bartlett Pears – No. 1's
2004 - 2013



California Canning Pear Price Trends
Bartlett Pears – No. 1's
2004 - 2013

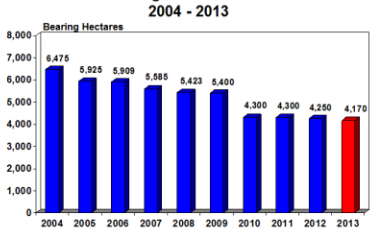


U. S. Canned Pear Imports
2012/13 Marketing Year



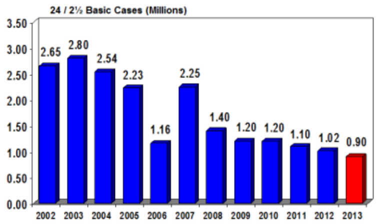
Marketing Year Total: 1,114,144 Cases (+ 17%)

California Apricots
Bearing Hectare Trends
2004 - 2013



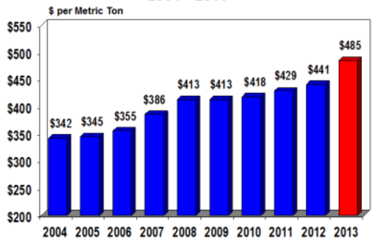
A 36% decrease since 2004.

California Canned Apricot Pack Trends
2004 - 2013

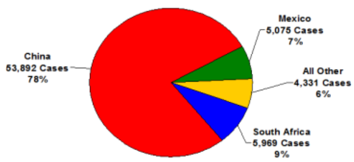


A 65% decrease since 2004.

California Canned Apricot Price Trends
2004 - 2013



U. S. Canned Apricot Imports
2012/13 Marketing Year



Marketing Year Total: 69,276 Cases (+44%)

CANCON12 COUNTRY : USA

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS
All varieties in hectares (ha)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	ha	9,835	9,230	9,030	9,240	8,580
Pears	ha	10,200	9,500	9,400	9,000	8,800
Apricots	ha	5,400	4,300	4,300	4,250	4,170

CANCON12 COUNTRY : USA

Total Agricultural Production

TOTAL AGRICULTURAL PRODUCTION OF DECIDUOUS FRUITS
All varieties in metric tons (mt)

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	422,778	390,154	355,042	333,802	330,527
Pears	mt	402,000	383,000	415,000	390,000	400,000
Apricots	mt	60,900	60,800	56,700	52,500	45,900

CANCON12 COUNTRY : USA

Agricultural Production : Canning

FRESH FRUIT PROCESSED FOR CANNING

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	406,500	374,940	340,740	318,960	319,510
Pears	mt	232,000	200,000	215,000	200,000	212,000
Apricots	mt	20,900	18,200	18,000	16,700	14,600

CANCON12 — COUNTRY : USA

Agricultural Production : Pulp

FRESH FRUIT PROCESSED FOR PUREE / CONCENTRATES

Products	Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	mt	7,300	7,650	7,850	7,900	5,800
Pears	mt	12,700	12,700	12,800	12,800	12,700
Apricots	mt	950	2,000	2,450	1,800	1,600

CANCON12 — COUNTRY : USA

Deciduous Fruit Pricing Indicators

FARM GATE FRUIT PRICES – LOCAL CURRENCY
Average per metric ton

Products		2009/10	2010/11	2011/12	2012/13	2013/14
Peaches		$351	$316	$321	$349	$386
Pears	CA	$327	$327	$343	$352	$379
	NW	$272	$276	$278	$286	$293
Apricots		$413	$418	$429	$441	$485

CANCON12 — COUNTRY : USA

Production : Canning

TOTAL CANNING PRODUCTION
Basic Cartons: 24 Cans x A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	17,700,000	16,400,000	14,100,000	13,100,000	13,500,000
Pears	6,700,000	6,800,000	7,500,000	7,000,000	7,400,000
Apricots	1,200,000	1,200,000	1,100,000	1,020,000	900,000
Total	**25,600,000**	**24,400,000**	**22,700,000**	**21,120,000**	**21,800,000**

CANCON12 — COUNTRY : USA

Processed Deciduous Fruit

CANNED FRUIT EXPORTS
Basic Cartons : 24 Cans X A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	802,000	1,030,000	1,293,000	1,185,000	958,000*
Pears	306,000	415,000	401,000	416,000	400,000*
Apricots	56,900	70,500	51,200	28,500	23,000*
Mixed	N/A	N/A	N/A	N/A	N/A
Total					

*Estimated

CANCON12 — COUNTRY : USA

Processed Deciduous Fruit

CANNED FRUIT DOMESTIC CONSUMPTION
Basic Cartons : 24 Cans X A2½

Products	2009/10	2010/11	2011/12	2012/13	2013/14
Peaches	15,428,000	15,710,000	15,157,000	13,365,000	13,100,000
Pears	6,400,000	6,300,000	6,500,000	6,200,000	5,900,000
Apricots	1,140,000	1,129,000	1,049,000	992,000	877,000
Mixed	N/A	N/A	N/A	N/A	N/A
Total					

CANCON12 — COUNTRY : USA

Processed Deciduous Fruit

NET PRICE PER TIN A2½ EASY OPEN

Unit	2009/10	2010/11	2011/12	2012/13	2013/14
Local Currency	$.27	$.25	$.25	$.26	$.27
In USD	$.27	$.25	$.25	$.26	$.27

INDUSTRY TOURS

The industry tours were to factories and orchards near Ceres and Paarl in Western Cape Province. Cameras were not permitted in the cannery tours but observation revealed that Atlas Pacific equipment was being utilized for splitting and de-stoning.

There was a considerable amount of reworking of fruit and this was done by teams of local workers (all female). The work culture was distinctly African with the workers singing in chorus in full voice while they worked.

The orchards were well kept and very similar in architecture to Australian orchards. The water supply in Ceres is almost totally obtained by snow run off from the rugged peaks that surround the orchards.

There is now a basic wage structure in place for field workers in South Africa of 150 Rand per day. This equates to approximately the hourly rate for a rural worker in Australian


Ceres peach orchard set in a rugged valley


Sampling fruit from bins at Ceres Fruit Growers Pty Ltd


Harvesting pears at Ceres


Local children perform a welcome dance for delegates at a Ceres orchard homestead.

SUMMARY & RECOMMENDATIONS

Cancon12 in March 2014 provided much information for the Australian processing fruit industry which had already been disseminated to key interested parties. Much of this was production information. The most important news, that was confirmed in detail, was that a rare 30 year event has occurred in the world wide industry with nearly all countries reporting a drop in production.

As result there will be an undersupply of processed fruit on the world market for most of 2014. The shortage could be as high as 30%. This will depend on what happens with the northern hemisphere harvest in 2014.

This means that import pressures will be lowered for Australia's sole processor of deciduous fruit, SPC Ardmona. This will benefit the company significantly in contract negotiations as it rebuilds its domestic market share that was savaged by import in the preceding five years.

Importantly is should provide some breathing space for SPCA as it restructures its operation following the announcement of the $100 million restructure investment by its parent company and the Victorian government.

This augurs well for the future of the Australian industry.

The objectives of this study tour project are;

1. The preparation of an Australian Canned Fruits Industry 2014 Country Report.
2. The attendance of the CFICA delegation at Cancon12 to present the country report.
3. To observe other deciduous canned fruits country reports.
4. To obtain world production & demand data and to ascertain the world over/under supply situation.
5. To obtain world cost of production data
6. To network with world producers and processors of canned deciduous fruit.
7. To discover new trends, techniques and technologies in orchard management and fruit processing which may benefit the Australian industry and consumers.

The objectives were all achieved by attendance at Cancon12. The information contained in this report is a significant summation of the status of canned fruits production and markets in member countries of the World Canned Deciduous Council.

This information is only available to the Australian industry available by participation in Cancon12 which was made possible by the support of Horticulture Australia Limited.

It is recommended that CFICA continue to participate in the World Canned Deciduous Council and attend canning conferences because knowledge of the balance of worldwide supply and demand to essential to the Australian canning industry at all levels.

It is also recommended that more frequent dialogue occur between CFICA and individual country organizations.

This report will be disseminated to the Australian Canning Fruit Industry through the VPAGA, Fruit Growers Victoria Limited and SPC Ardmona. It will posted on the Fruit Growers Victoria Limited website.