Tenth World Deciduous Canning Fruit Conference ("CANCON10"), Xuzhou China STUDY TOUR

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Canned Fruits Industry Council of Australia

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CANNED FRUITS INDUSTRY COUNCIL OF AUSTRALIA

FINAL REPORT

10th World Deciduous Canning Fruit Conference

Xuzhou, China August 2010

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REPORT PURPOSE: The purpose of this Final Report; of the study tour to the 10th World Deciduous Canning Fruit Conference ("CANCON10") held in Xuzhou, China in August 2010; was to gain; knowledge 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 Canned Fruits Industry Council of Australia with matched levy funding by the Australian Government through Horticulture Australia Limited ("HAL").

REPORT DATE: 15th December 2010

MEDIA SUMMARY

The 10th World Deciduous Canning Fruit Conference ("CANCON10") was held in Xuzhou, China in August 2010. These conferences are held every eighteen months and alternate between northern and southern hemisphere members of the World Canned Deciduous Council.

At Cancon09, which was held in Shepparton, Australia in March 2009, it was revealed that China produces 48% of the world's canned peaches. China was not a member of the World Canned Deciduous Council, so an invitation was extended to the China Canned Foods Industry Association to participate. The Chinese accepted the invitation and hosted Cancon10.

The members of World Canned Deciduous Council are Argentina, Australia, Chile, China, Greece, Spain, South Africa and USA.

Delegations from each member country made presentations to an audience of over 600 people, including 55 delegates and others from around the world including non member countries. Attendees also came from, Thailand, Japan, Canada, Italy Germany and Russia.

The Australian Delegation from the Canned Fruits Industry Council of Australia consisted of cannery representatives, fruit growers and grower association representatives;

Simon Mills	CFICA Chairman (SPC Ardmona)
John Wilson	CFICA Secretary
Philip Pullar	Murray Valley Fruit Grower (P. Pullar & Co)
James Cornish	VPAGA Chairman
Helen Cornish	Murray Valley Fruit Grower (R J Cornish & Co)
Roger Lenne	FGVL Member
Lynda Lenne	Goulburn Valley Fruit Grower (Calimna Orchards)
Michael McCormack	SPC Ardmona

At Cancon10 each country presented reports on current production, acreage, and prices paid to farmers. The common theme for most reports (except China) was a decline in markets, reduced production and falling producer prices.

China has production growth and although exports contracted in 2008 by 7% during the global financial crisis, its domestic consumption grew by 14%. China expects to double domestic consumption by 2014 despite reporting increases in labour and tin plate costs.

Elsewhere the effects of the global financial crisis continue to impact on world demand with currency appreciation against the American dollar being a major factor in reducing competiveness for exporters.

CONFERENCE PROGRAM

Schedule

24 August	Afternoon	Registration
		Meeting
25 August	Morning	Opening Ceremony
	Afternoon	CANCON10
	Evening	Xuzhou welcome dinner
26 August	Morning	CANCON10
	Afternoon	CANCON10
	Evening	Xuzhou Factories Visit
27 August	Morning	Visit Xuzhou Dafeng Factory
	Afternoon	Visit Xuzhou Lixiang Factory
	Evening	Xuzhou Peixian Evening
28 August	Morning	Visit Orchards,
		Visit Anhui Xike Factory
	Afternoon	Visit Anhui Keji Factory
	Evening	Suzhou Dangshan Evening

Conference

The Conference commenced with a registration day, which allowed participants to meet informally, adjust jet lags and rest. Many delegates had not met in face to face situation SINCE Cancon09 in Shepparton, Australia. These informal meetings facilitated networking and discussion of expectations from Cancon10.

Cancon10 officially opened, the next day, on August 25th. Prior to the pubic opening leaders of the delegations from the various countries had a formal audience with the mayor of Xuzhou. CFICA Secretary, John Wilson who organized Cancon09, was asked to make a speech and participate in the formal opening.

Simon Mills, CFICA Chairman, made a presentation of a traditional hunting boomerang to Mr Liang Zhong Kang *(pictured)*, who is the chair of China Canned Foods Industry Association is. The boomerang represented the passing of a baton from Cancon9 to Cancon10. It was used in Mr Wilson's speech which discussed ancient and modern innovation and the need for Cancon10 to investigate innovative solutions to issues.

The Cancon10 opening ceremony was attended by approximately 600 people and was videotaped for China national news services. It was considered a very important event was supported significantly by the Chinese and provincial governments. Full media coverage continued throughout the conference.

A formal dinner was held in the evening following the opening ceremony.

The conference proper commenced the next day (August 26th). Representatives of the eight member countries; Argentina, Australia, Chile, China, Greece, South Africa, Spain, and the USA all gave reports on current production, acreage, and prices paid to farmers. The general tone for most reports was reduced production and falling producer prices. Greece reported

production drop of up to one third following the loss of access to Russian markets. All Euro and $US traders had been affected by currency movements.

The Chinese industry report addressed their ongoing effort to develop the domestic market for canned fruit in China by diversifying their range of products, strengthening the image of their domestic brands, and addressing consumer concerns over health and nutrition. The Chinese report also referenced higher costs for sugar, tinplate, raw product, boxes, and shipping which have made their export markets less profitable than previous years.

Foreign delegates noted that the Chinese report lacked the statistical detail of its Cancon09 report. Nevertheless the anecdotal information provided and good indication of the Chinese circumstance.

MS PowerPoint copies of the individual Cancon10 country reports are available by email request from the CFICA at admin@fgv.com.au. A synopsis of each country report is included as Appendices 1 to 8 herein.

Simon Mills, CFICA Chairman, presents the Australian Country Report

Tours

The final two days of Cancon10 were tours of factories and orchards in Anhui and Peixan with a closing event dovetailing with and incorporating the opening ceremony of the Fourth Chine Fruit & Vegetables Industry Development Forum in Dangshan.

The factories that were visited were labour intensive although there was some recent mechanisation by the introduction of conveyer belts in one factory. However, in most factories, fruit is carried from work station to work station in basins. The following pictures were compiled from several factories to show the processes employed. Factory workers are paid 45RMB (~$AUD7) per day for a ten hour six day week.

Fruit arriving by truck in farmer owned crates is offloaded by hand onto handcarts and taken for pre-sorting

Fruit is hand cut on a rotating blade then de-stoned by hand

A caustic wash removes the skin be for fruit is collected in basins by trimmers

Any blemishes are trimmed off by hand then workers queue to have their tallies recorded

Fruit is sliced by hand then weighed individual to pack weight


Fruit is hand packed into canned and prepared for the cooker


Fruit goes into the cooker then heads for the packing line


Traditional cans and plastic cups are hand stacked on pallets

A typical factory work floor

Besides canneries, the conference attendees also visited one juice factory and three orchards. The juice factory was not working at that time and an understanding of operations was limited to a brief view of the factory from a visitors' gallery window *(pictured)* and a video presentation.

However, juicing apples were observed as the buses travelled through the countryside. Juice apples were being collected on hessian on the ground before being bagged for delivery to the juice factories.

Apples stored on the ground whilst at another location roadside apples are being boxed for the fresh market or bagged for juicing

Apples are packed into boxes on in the open on the side of the road before being transported on unrefrigerated trucks

Traditional Chinese orchards are three mu in area and are more like a densely planted mixed fruits garden than an orchard.. A mu is ten metres by sixty-six metres which means there are fifteen mu to the hectare or a traditional orchard is one fifth of a hectare. The attendees were not taken traditional orchards but visited to three "modern" orchards. However traditional orchards and activities were observed.

Traditional orchards are densely planted fruit gardens and on-farm accommodation is very basic

L Philip Pullar, Lynda Lenne & Roger Lenne visited the oldest pear tree the world R Helen and James Cornish inspect peach trees

Cancon10 delegates visited 3 modern orchards

The modern orchards were considered to be a showpiece by the Chinese. They have adopted many management techniques including IPDM and QA. The main differences between modern Chinese orchards and modern Australian orchards are orchard architecture, tree structure cultivar variety.

Modern Chinese orchards practice IPDM

L James Cornish discusses peaches with a South African delegate R Fruit quality was good


L Philip Pullar inspects orchard transport R Alan Wilson (Chile) and Simon Mills inspect an orchard


L Orchard produce was available for inspection R Inside a "giant" nursery

Australian delegates inspect fruit

Philip Pullar inspect packaging

Intensive seedling production

Inside a "giant" nursery

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FINANCIAL REPORT

SUMMARY & RECOMMENDATIONS

A meeting of members of the World Canned Deciduous Council at the SIAL Food Fair in Paris France in October 2009 calculated that world supply and demand of canned peaches was in balance. Six months later, at Cancon09 in Australia, the balance had changed dramatically and supply for canned peaches was exceeding demand by 1 million cartons. The world economic crisis was the reason for the change but Cancon09 gave the global industry the opportunity to understand it better.

The need for a global forum for the deciduous canned fruits industry had never been more obvious. China did not participate in Cancon09 but agreed to host Cancon10. As the world's largest producer of canned deciduous fruits China's production is an important factor in the global market. Cancon10 provided many with their first opportunity to learn about the state of the Chinese canning industry and compare it to other producers.

The objectives of this project were;

1. The preparation of an Australian Canned Fruits Industry 2010 Country Report.
2. The attendance of the CFICA delegation at Cancon10 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 first six objectives were all achieved by attendance at Cancon10. The appendices to this report contain a significant amount of current information about canned fruits production and markets in member countries of the World Canned Deciduous Council. This information is only to the Australian industry available by participation in Cancon10 which was made possible by the support of Horticulture Australia Limited.

Te seventh objective was not achieved by direct attendance at Cancon10 because new trends, techniques and technologies in orchard management and fruit processing were not formally addressed at the conference. However, the significant contact list and networking gained provides a platform for further interaction which could lead to such gains.

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.

Appendix 1 - ARGENTINA REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Compiled by: AFIM: Canners Association of Mendoza, APDM: Peach Growers Association of Mendoza, Fe.PEDI: Federation Strategic Plan Peach Industry

Presented by: Roberto Lamm

Delegates: Mariano Santos (Chairman CAFIM), Roberto Lamm (Executive Director, Industrias Alimenticias Mendocinas S.A. (ALCO),Vice President CAFIM), Omar Donis (Industrial Manager, Arcor S.A., Vice President CAFIM), José Morales (President, AVA S.A., Director CAFIM), Daniel Nieto (Chairman Fe.PEDI, Peach Grower), Juan F. Reginato (Chairman APDM, Peach Grower

Observers: Roberto Meli (Peach Grower, Director APDM), Raúl Mercau (Minister of Production of the Government of Mendoza), Bruno Pescarmona (Agricultural Manager, Arcor S.A, Director CAFIM)

Peach Forecast - IDR 2010 Crop (December 2009)

Oasis	TOTAL			BEARING		
	Ha	T	T/Ha	Ha	B%	T/Ha
Northeast	2	26.4	13.2	1.7	85.0%	15.5
Valle De Uco	3.6	78.5	21.8	2.9	80.6%	27.1
South	2.4	17.1	7.1	2	83.3%	8.5
TOTAL MZA	**8.0**	**122.1**	**15.3**	**6.6**	**82.5%**	**18.5**
Acrual Processed		117.5	96%			

Total Agricultural Production of Deciduous Fruits (All varieties in Tons and Hectares)

		2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	T	126.8	152.3	159.0	151.0	117.5
	Ha	7.600	7.600	7.617	8.000	7.968
PEARS	T					
	Ha					
APRICOTS	T					
	Ha					

Amount of Fresh Fruit Canned **Peaches & Pears: includes Canned Mixed Fruits**

		2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	T Ha	67.5	83.7	83.5	80.4	81.1
PEARS	T Ha	9.5	9.5	10	11.5	12.5
APRICOTS	T Ha	-	-	-	150	170

Amount of Pulp Fruit **(and other industrial uses)**

		2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES (pulp)	T Ha	55.3	63.6	71.6	67.7	36.4
PEACHES (others)	T Ha	4.0	5.0	5.0	3.0	
PEARS (pulp)	T Ha	12.0	10.0	20.0	24.0	8.5
(pulp)	T Ha	17.5	6	8	14	2.2

Total Industrial Production Capacity Basic Cartons (24 Cans / 1 Kg)

		2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	Nº Industries Prod. Cap.	17 5000000	18 5000000	20 5500000	20 5500000	20 5500000
PEARS	Nº Industries Prod. Cap.	6 300000	6 300000	7 350000	7 350000	6 400000
APRICOTS	Nº Industries Prod. Cap.	- -	- -	- -	- -	1 50000
MIXED FRUITS	Nº Industries Prod. Cap.	7 600000	7 600000	7 600000	7 600000	7 500000
PULP LINES	Nº Industries Prod. Cap.	6 70000	7 85000	8 95000	9 100000	9 120000

Total Canned Production In Basic Cartons **(24 Cans / 1 Kg)**

	2005/06	2006/07	2007/08	2008/09	2008/09 Export Carryover	2009/10
PEACHES	3560000	4450000	4560000	4160000	100000	4350000
PEARS	250000	250000	250000	350000	0	365000
APRICOTS	-	-	-	-	-	9000
MIXED FRUITS	415000	370000	430000	440000	0	470000

Domestic Consumption Of Canned Products Inbasic Cartons **(24 Cans / 1kg)**

	2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	1828100	2803700	3294500	3382000	3550000
PEARS	92700	148200	140600	174000	190000
APRICOTS	-	-	-	-	3000
MIXED FRUITS	251300	284500	334300	360300	400000

Peach Imports – Domestic Consumption

	2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	3600	66000	73900	1500	0

Exports Of Canned Produccion In Basic Cartons (24 Cans / 1 Kg)

	2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	1731900	1646300	1265500	1078000	800000
PEARS	157300	101800	109400	176000	175000
APRICOTS	-	-	-	-	6000
MIXED FRUITS	163700	85500	95700	79700	70000

Total Pulp Production (Mt. - 30/32° Brix)

		2005/06	2006/07	2007/08	2008/09	2008/09 Export Carryover	2009/10
PEACHES (75%Export)	T	15.50	17.50	24.20	20.40	2.00	11.00
PEARS (85%Export)	T	4.00	3.30	6.00	7.30	1.00	2.75
APRICOTS (90%Export)	T	5.50	2.50	2.80	4.50	1.00	700.00

Net Price Paid by the Industry per MT Price of raw material for Canned Products

		2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	Local Currency					
	$US	180	250-260	380-400	160-170	270-290
PEARS	Local Currency					
	$US	150	150	160-180	120-160	130-200
APRICOTS	Local Currency					
	$US	-	-	-	-	300

Net Price Paid By The Industry Per M.T. Price of raw material for Pulp

		2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	Local Currency					
	$US	90	140	290-330	70-85	90-120
PEARS	Local Currency					
	$US		80	150	70-80	80-100
APRICOTS	Local Currency					
	$US	-	-	-	-	150-170

Peach Census 2010

Oasis	2004 Ha	2007 Ha	2010 Ha	2004 to 2007 Change%
Northeast	2136.3	2079.8	1927.3	-9.8%
Valle De Uco	2297.8	2812.7	3644.5	58.6%
South	3162.5	2724.4	2396.1	-24.2%
TOTAL MZA	**7596.6**	**7616.9**	**7967.9**	**4.9%**
Number of Orchards	1550	1325	1393	
Number of Growers	1362	1129	1114	

Peach Census 2010 More than 97 % Fulfilled

Oasis	2004			2007			2010			
	Ha	Orchards	Ha/O	Ha	Orchards	Ha/O	Ha	Orchards	Ha/O	Bearing Ha
Northeast	2136.3	292	7.32	2079.8	240	8.67	1927.3	195	9.88	1753.8
Valle De Uco	2297.8	147	15.63	2812.7	170	16.55	3644.5	170	21.44	2897.2
South	3162.5	1111	2.85	2724.4	918	2.97	2396.1	1028	2.33	1988.8
TOTAL MZA	**7596.6**	**1550**	**4.90**	**7616.9**	**1328**	**5.74**	**7967.9**	**1393**	**5.72**	**6639.8**

Peach Census 2010 Main Varieties

MAIN VARIETIES		Ha	%	Rank
Pavia Caterina		1120	14.06%	**2**
Fortuna		526	6.60%	6
Loadel		513	6.44%	7
Carson		288	3.61%	9
Bowen		1153	14.47%	**1**
Andross		827	10.38%	**3**
Dr. Davis		785	9.85%	4
Ross		609	7.64%	5
Hesse		362	4.54%	8
Subtotal		**6183**	**77.60%**	
Others *		1785	22.40%	
TOTAL MZA		**7968**	**100.00%**	

Others (*) Dickson, Gaume, Sullivan, Everet, Rizzi, Halford, Late Sullivan, Starn, Orange Cling, Unknown (440Ha)

Appendix 2 - AUSTRALIA REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: Simon Mills on behalf of the Canned Fruits Industry Council of Australia

Canned Fruits Industry Council of Australia

- Peak industry organization
- CFICA represents the interests of both the growers and the canner
- CFICA membership now comprises only
  - 2 Fruit Grower Associations
  - 1 Fruit Canner

SPC Ardmona

- 2002 - SPC and Ardmona merged
  - Only 1 canner remaining, operating 3 factories in Victoria
- 2005 - SPC Ardmona acquired by Coca Cola Amatil
  - CCA is Australian owned beverage manufacturer
  - Sole bottler of Coca Cola products in Australia, New Zealand, Indonesia
  - The Coca Cola Company (US) is the largest shareholder

- Growers
  - All deciduous canning fruit grown within 80km of Shepparton factory
  - Approximately 210 growers will supply deciduous fruit to the canner
    - A 30% reduction since the commencement of rationalization in 2006

- Growers
  - 210 Growers supply canning fruit to SPC Ardmona
  - Supplier rationalization has resulted in 15% reduction in number of canning fruit growers since 2006
  - Average grower now derives only 35% of total business farm gate income from canning fruit.
  - Balance of income is from fresh market varieties
  - Most growers supply at least 2 canning crops;
    Pear + Peach, or Peach + Apricot + Plum, etc.

- Production Capacity
  - 2006-2010:
    - Canning Apricot hectares reduced by 31%
    - Canning Peach hectares reduced by 12%
    - Canning Pear hectares reduced by 11%,
    - Crops have been further reduced due a series of bad seasons,
      - Frost, Hail, Drought, Heat, Rain
      - Growers are suffering
    - Grower costs have increased substantially
    - Wages now account for 65% of annual cost in some varieties

- Current Plantings (Goulburn Valley)

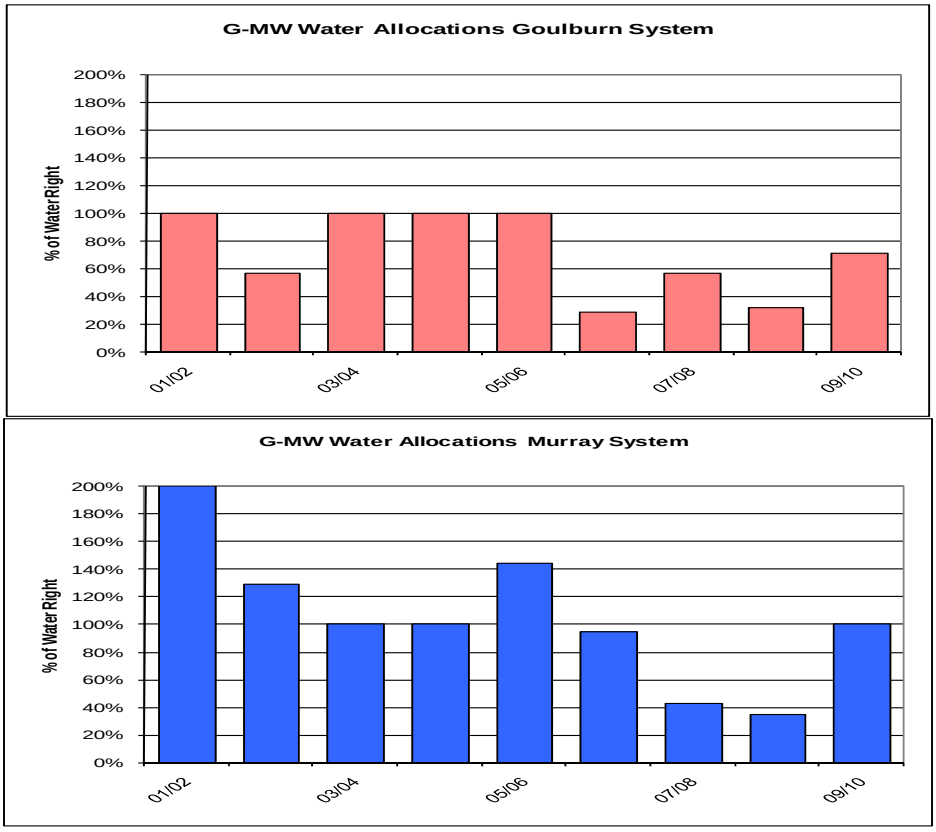
Crop	2006 Ha	2010 Ha	+/-
Apples	2,260	2,230	+ 1%
Apricots (all varieties)	615	525	- 15%
Nectarines	650	675	+ 4%
Peach Cling	1,863	1,648	- 12%
Peach Fresh Market	385	492	+ 28%
Pear WBC	1,630	1,450	- 11%
Pear Fresh Market	1,990	2,018	+ 1%
Plums	565	562	
Other	800	900	
	10,758	10,500	- 2.4%

- Irrigation Water

- Availability
  - Prolonged drought since 1999 depleted annual reserves
  - All canning fruit are reliant on irrigation water supplied by government controlled channel system
  - Allocation of irrigation water is regulated
- Cost
  - Increased cost to purchase water allocation from dairy farmers

- Labour
  - Costs
    - Recent changes to legislation has increased costs of orchard labour
    - Factory labour costs continue to rise:
      - AUD 22.06 basic rate in 2011
      - Plus Leave accruals, Insurance, Superannuation etc
      - Plus shift and overtime allowances
  - Availability
    - Reliance on international backpackers to supplement numbers

Irrigation Water Allocations

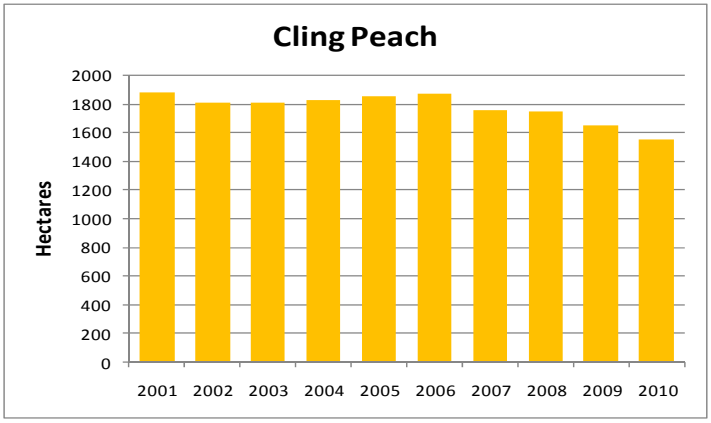


Agronomic Research and Development

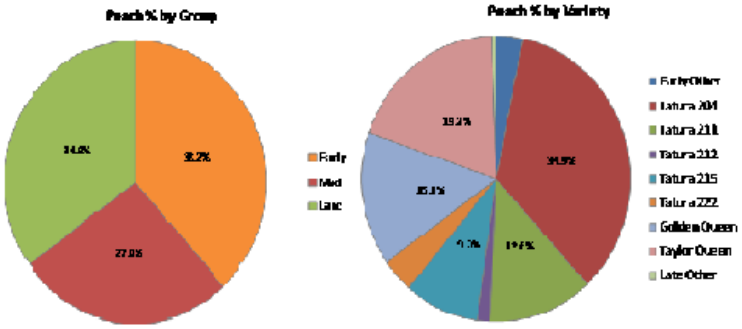
- Breeding Programs
  - Apricot
  - Peach
  - Pear
- Labour Reduction
  - Mechanical harvesting
  - Mechanical and chemical thinning
- Water Saving
  - Drought has challenged growers to improve irrigation efficiency
- Climate Change
  - Reduced Chill Hours with warmer winters

- Increased Frost Risk due to drier winters

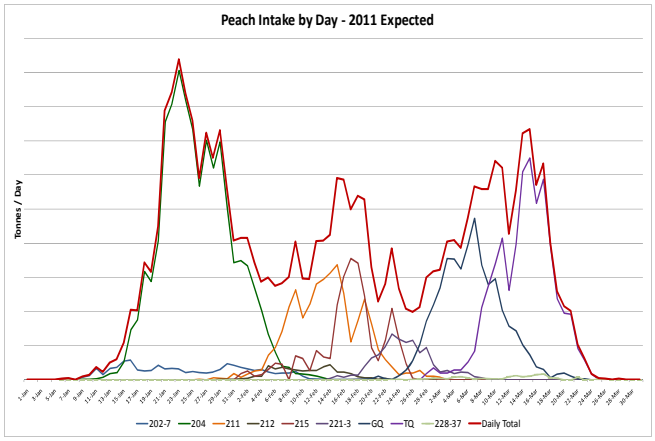
Peach Planting Trends



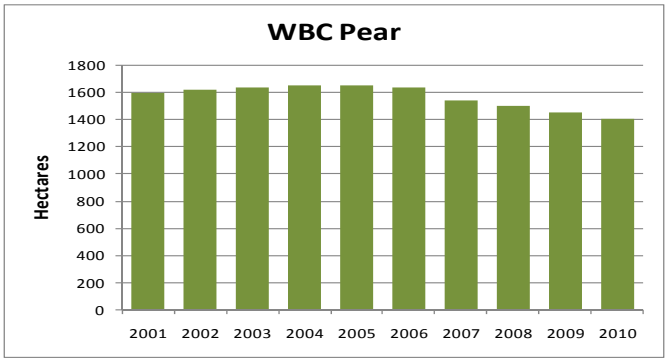
Peach Varieties and Harvest Timing Peach Varieties and Harvest Timing

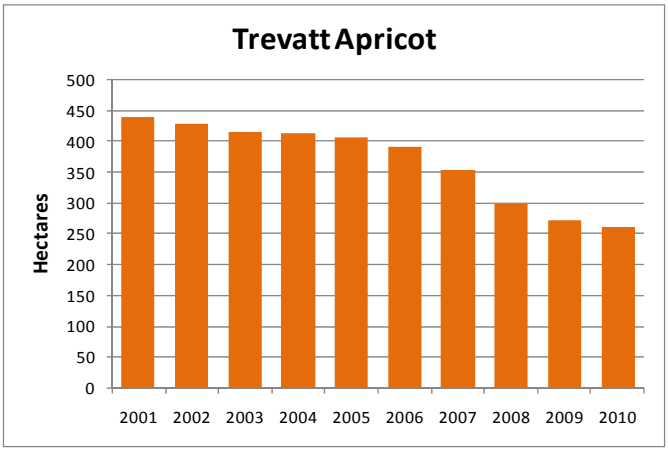


Peach Daily Intake



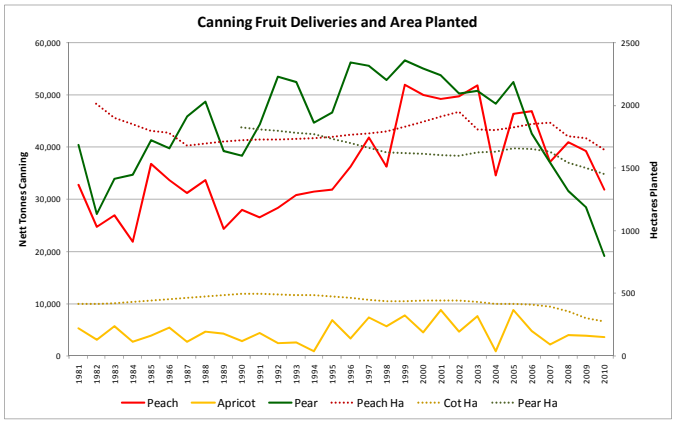
Pear Planting Trends





- Area planted to Trevatt Apricot has reduced by 38% since 2001

Canning Fruit Delivery Trends



Total Agricultural Production Of Deciduous Fruits (All varieties in Metric Tonnes And Hectares)

	UNIT	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	MT	57,430	46,770	49,130	48,080	41,150
	HA	1,853	1,863	1,753	1,739	1,648
PEARS	MT	90,845	78,225	76,997	67,451	42,030
	HA	1,652	1,630	1,540	1,499	1,449
APRICOTS	MT	8,800	4,100	8,460	5,948	6,181
	HA	408	392	354	299	272

Agricultural Production Of Deciduous Fruits Varieties For The Canning Industries (MT)

	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	54,693	44,453	46,791	44,935	37,403
PEARS	56,621	50,315	39,917	35,518	21,300
APRICOTS	7,039	2,928	6,769	4,957	5,375

Amount Of Fresh Fruit Canned Marketing Year (MT)

	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	46,924	37,188	40,955	39,259	31,843
PEARS	42,606	37,059	31,621	28,509	19,153
APRICOTS	4,785	2,192	4,001	3,884	3,635

Amount Of Fresh Fruit Used In Puree Marketing Year (MT)

	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	4 ,476	4 ,586	3,455	3,100	1,750
PEARS	1,400	800	1,150	1,400	1,200
APRICOTS	2,254	736	2,768	1,073	1,740

Total Industrial Production Capacity Basic Cartons (24 Cans / 1 Kg)

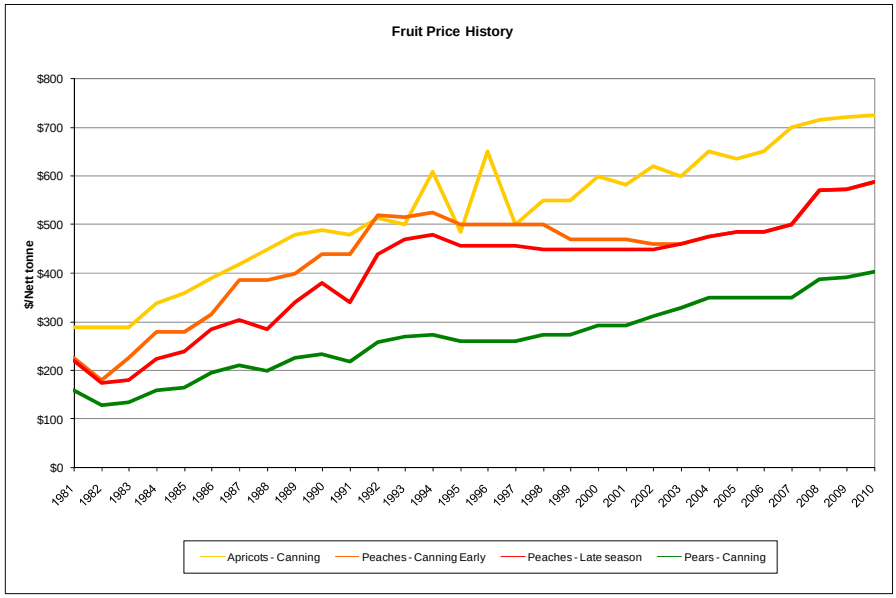
		2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	Nº Industries	1	1	1	1	1
	Prod. Cap.	1,600,000	1,600,000	1,600,000	1,600,000	1,600,000
PEARS	Nº Industries	1	1	1	1	1
	Prod. Cap.	1,400,000	1,400,000	1,400,000	1,400,000	1,400,000
APRICOTS	Nº Industries	1	1	1	1	1
	Prod. Can.	825,000	825,000	825,000	825,000	825,000
MIXED FRUITS	Nº Industries	1	1	1	1	1
	Prod. Can.	2,600,000	2,600,000	2,600,000	2,600,000	2,600,000

Total Canned Production In Basic Cartons

	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	1,447,036	1,118,600	1,208,465	1,109,760	903,855
PEARS	922,830	767,900	654,238	582,960	361,505
APRICOTS	356,961	171,195	310,558	291,883	219,942
MIXED FRUITS	2,220,135	1,843,950	1,794,345	1,624,144	1,034,239

Net Price Paid By The Industry Per Metric Tonne Price in $AUD

		2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	IN LOCAL CURRENCY	485	500	565	572	588
	IN USD					
PEARS	IN LOCAL CURRENCY	350	350	389	393	404
	IN USD					
APRICOTS	IN LOCAL CURRENCY	635	700	715	721	724
	IN USD					



Limited Water Resources?

- Almond orchard
  - 10,000 hectare orchard planted in 2008
  - Managed Investment Schemes with government tax assistance

Appendix 3 - CHILE REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: Alan Wilson

Total agricultural production of deciduous fruits (all varieties)

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH	MT	216.48	226.65	169.9	221.38	315.05	284	233
Cling peaches	HA	7.5	7.8	7.6	9	10.27	10.27	10.1
PEARS	MT	137.6	138.3	117.6	112	110		
	HA	7.28	7.28	6.5	6.59	6.59		
APRICOTS	MT	21.2	24.5	18.8	20	21		
	HA	1.8	1.8	1.6	1.45	1.45		

Agricultural production of deciduous fruits varieties, for the canning industries

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH Cling peach	MT	195.48	201.7	142	206.38	305.05	269	215
PEARS	MT	39.1	40.5	43.6	70	80		
APRICOTS	MT	14.47	12.57	8.05	8	8		

Amount of fresh fruit canned marketing year

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	**2008/09**	**2009/10**
PEACH	MT	81	85.2	61.8	80.38	103.35	**83.8**	**97**
PEARS	MT	7.9	14.5	12.15	11	12		
APRICOTS	MT	945	900	850	770	350		

Amount of fresh fruit used in puree marketing year

SPECIES	UNIT							
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH	MT	94.85	116.5	80.2	126	201.7	185	118
PEARS	MT	32.2	35	31.35	72.9	69		
APRICOTS	MT	6.38	8.4	7.13	5.89	6.68		

Total canned production in basic cartons

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH	24 Cans / 1 Kg	3.800.000	3.950.000	2.870.000	4.120.000	5.330.000	4.400.000	4.955.000*
PEARS	24 Cans / 1 Kg	80	120	100	80	80		
APRICOTS	24 Cans / 1 Kg	36	50	42	25.7	11.98		
MIXED FRUITS	24 Cans / 1 Kg	520	550	550	715	750	328	344

Total puree production (30/32º Brix)

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH	MT	29.1	37.6	26	42	74.3	61	40.000*
PEARS	MT	11.5	12.9	12	19.6	20.1		
APRICOTS	MT	2.42	2.9	2.5	2.36	2.52		

Domestic consumption of canned products

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH	MT	16.1	18	17	23.6	23	25.5	25.6
PEARS	MT	78	80	80	70	50		
APRICOTS	MT	28	30	40	20	20		
MIXED FRUITS	MT	350	390	350	850	900	800	760

Exports of canned products

SPECIES	UNIT	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACH	MT	59.05	67.2	50.886	57.434	62.25	57.352	67.9
PEARS	MT	1.5	1.5	1.5	1.2	1.1		
APRICOTS	MT	710	690	220	505	236		
MIXED FRUITS	MT	9.6	8.66	11.276	12.859	11.429	7.844	5.96

Net price paid by the industry per M.T.

SPECIES	CURRENCY	YEAR						
		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
PEACHES	Local (000)	158	85	95	140	142	115	103
	USD	270	147	184	259	300	187	189
PEARS	Local (000)	82	40	40	50	70	60	
	USD	140	69	77	93	93	148	
APRICOT	Local (000)	165	98	90	110	140	105	
	USD	282	169	161	204	297	170	

Appendix 4 - CHINA REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: Liang Zhongkang (Chairman of China Canned Food Industry Association)

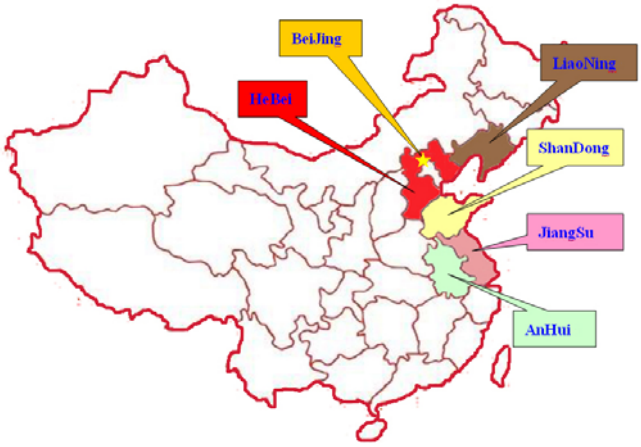
My report is divided in three parts:

1. General Information
2. Key Points of the Industry
3. The Future Directions

1. General Information

Location of Raw Materials

The growing areas of peaches, pears and apricots are mainly in four regions from South to North in China: Namely, the Northern Anhui province (Dangshan), Southeast Shandong province (Mengyin of Linyi), Beijing and Hebei province, Dalian of Liaoning province. They have the following characteristics:



The fruits trees grow in connections and large scales in the four regions, e.g., the production volume of yellow peaches in Dangshan of Anhui is 200,000 tons per year (increased 10%), 200,000 tons in Mengyin of Linyi, in Shandong province, in Beijing and Hebei (peaches are mostly the white ones) ,50,000 tons, and in Wafangdian of Dalian, 100,000 tons per year.

The time for material supply is different for about one month from the south to north, in most south part of Anhui, in early July while in Dalian regions, in early August, the pick up period of materials is around 50 days.

Except for the above four main regions, peaches, pears and apricots also grow in other provinces and regions but in a scattered way with less yellow peaches growing.

Affected by early low temperature and frost of flower period this year, the pick up time for fruits delayed for 10 days and the production volume reduced a little;

Location of the Industry

Canned fruits processing enterprises are in Large number and scattered in a broad regions in China. Due to the low technical requirement to enter the industry, there are many small processing workshops in China. According to incomplete statistics, there are as many as 500 to 600 canned Peach, pear and apricot processing enterprises in China.

Now the government strictly controls the food processing industry in two respects: one is to process and sell food products at home under QS (Quality Safety), namely Quality Safety Allowance. The other is to export food processing products under a healthy registration certificate given by the government supervision department with more strict conditions. At present there are about 100 enterprises in China to export canned fruits. The domestic reduction , sale and export of canned fruits are all responsible by the state administrative departments of inspection & quarantine on food, it's a forced inspection.

Export Status

In 2009 export volume of canned food in China reduced around 10% affected by international financial crisis, the export volume of canned peaches, pears, apricots and other mixed fruits to the main countries and regions are as follows;

① Export Volume of canned peaches, pears, apricots and other mixed fruits in 2009
② Export Volumes of Canned Peach to the main target countries (Regions) in 2009
③ Export Volume of Canned Pears to the main target countries (regions) in 2009

1

Country & Regions	Export Volume in 2009 (Tons)	Increased ratio compared With the same period last year(%)
USA	22781	-1.26
Germany	7359	2.19
Thailand	5803	-5.96
Spain	3704	9.04
Greece	1996	-62.38
Canada	1682	10.29
Japan	1278	-3.3
France	1185	71.06
Yemen	1137	52.16
UK	1023	65.05
Other Countries	3983	-50.2

2

Country & Regions	Export Volume in 2009 (Tons)	Increased ratio compared with the same period last year(%)
Germany	4332	-19.18
France	3237	17.94
Russia	2106	-56.2
UK	1080	36.04
Canada	711	93.08
Belgium	652	48.39
Czech	637	-32.26
USA	533	-3.04
Other countries	2659	-40.28

3

Country & Regions	Export Volume in 2009 (Tons)	Increased ratio compared with the same period last year(%)
USA	19987	37.22
Canada	10832	31.56
France	7653	173.86
Germany	7290	22.8
Spain	2989	3.36
UK	2526	68.31
Japan	1705	74.87
Austria	1659	31.73
The Netherlands	1233	156.65
Australia	1179	-25.4

① The financial crisis influenced the export of canned fruits, except for a certain increase of mixed fruits, the drop rates for canned peaches, pears and apricots are all over 10% where canned apricots even dropped 22%.

② Export to Russia and east European countries dropped in a big volume. Due to the local currency devaluations and lack of capital for importers, the import volume sharply reduced that caused Chinese manufacturers, who export mainly to these regions, to suffer a big loss.

③The selling price for export is almost equivalent to that in 2008 where the price for canned mixed fruits go up to 10%, canned pears,3%, and canned peaches, equivalent while canned apricots, come down 7%.

Import Status

Import of canned peaches, pears and apricots was not big. According to statistics from Chinese customs in 2009, import for canned pears is 58 tons, canned apricots, 4 tons, canned peaches,5710 tons, come down 18% where canned peaches from South Africa, 5346 tons showing that most of the imported canned peaches are from South Africa that meets the demands of high end market in China (for high grade bakery food in star hotels).It's known that China import canned fruits either in direct way or transfer via Hong Kong. Canned peaches from South Africa are mainly via Hong Kong, it is to be confirmed that if this figure in included in the customers statistics.

Domestic Market

In recent years, sales of canned peaches, pears and apricots at home grow very fast in which yellow peaches grow the fastest, the general increase ratio is about 20-30%,some manufacturers' annual increase go up to 50%. The domestic sales in 2009 grew as fast as about 30 tons with the following reasons:

①By continuous efforts, there appears a group of key enterprises that has concentrated their attention to domestic Markets, working hard on product location, brand building and

way of marketing. Their main approach is to set up a brand , improve qualities of a product and its packages , make a promotion for a product and establish a good sales team.

②Market forwarded: New Year's Day and Chinese Traditional New Year 's Day (Spring Festival) are the peak season for canned peaches. Manufacturers will make promotions of canned yellow peaches by packing them in a gift pack in shops and supermarkets that is well received by market. But the fast growth makes most of the manufacturers run out of goods and to ensure manufacturers to supply enough goods throughout the year is an issue many manufacturers face.

③The government encourages enterprises to turn into a market oriented one: The fast growth of China's export trade offers opportunity for national economic development but under a great pressure." Investment, Consumption and Export" , the three carts in Chinese economy, are not balanced, therefore the government has made policies for market transfers and technical innovation for all industries. In answer to these new strategies, together with manufacturers, China Canned Food Industry Association (CCFIA) lunched a public activity.

Issues to face

For export:

① The price for raw materials is up that rises the pressure upon the cost. In 2010,expenses for sugar, tinplates, paper box and ocean shipping are all up, some are even up to 20%;

② There is a shortage and cost increase for laborer. As fast development of economy and urbanization, laborers expect to find a highly paid and better conditioned work. The salary and welfare for laborers rise up greatly so that they show little interest in canned food processing work ;

③ RMB practises a flexible exchange rate mechanism where there is a passive fluctuation;

④ The export oriented manufacturers are scattered and short of industry concentration so that there is disordered competition among manufacturers, and the profit for export is little, besides manufacturers will undertake a high risk of price rise, capital shrinkage and quality claims. It is difficult for them to exist and develop.

For domestic sales:

It is required to give a wide publicity of canned fruits because many customers in China mistake that canned fruits are added with antiseptics and unsafe. Some even thought it is not nutritious compared with fresh fruits. To clear up these misunderstandings, it is required to devote major efforts to give wide publicity of canned fruits, especially to encourage the good qualified manufacturers to be responsible to provide good products and good ideas.

2 Key Development Points

The key development points are the issues on canned fruits industry to be concerned and solved.

Industry Upgrading

For a long time it required many workers in canned peaches, pears and apricots processing industry, even for some semi-mechanized operations, manual work is still needed for stripping the nuts off. There is no transmission line links. So it requires more workers for canned fruits and it requires about 30 people for a ton of canned yellow peaches. In recent years the manufacturers recognized that with the growth of labor cost and difficulties in management, it is necessary to make mechanization and continuation innovation on processing work from the point of view of quality control and civilized work.

At present the main approaches are:

①A continuous transfer line between each working process.

②It is recommended to use continuous sterilizer.

③ Import some production lines with cutting peaches and tripping off the nuts (Mainly by Atlas, FMC, OMIP).

Domestic Market.

The domestic market for canned fruits is tended to grow fast with the following features:

①Market sales grow gradually each year (according to incomplete statistics, domestic sale of canned fruits reached 300,000 tons a year and the growth will keep 20% per year in future).

②More manufacturers will join the domestic market and large sized enterprises have good expectations in growth.

③Innovations on products and packaging make the domestic market active.

④Chinese domestic market has a great potential.

Main issues existed:

① Consumers have misunderstandings in canned fruits that canned fruits are added with antiseptics, not fresh or contain too much sugar.

② There is a similarity on various brands of products that influence little to consumers.

Solutions:

①Devote major efforts to give wide publicity of branded canned fruits to support manufacturers to raise their popularity and reputation.

②Develop diversified products to meet the demands of market in such a way that the products may be classified in drinks, gifts, or used in catering and other ways with characteristics(in different sizes, grades, tastes and etc.).

Food Safety.

Food safety is critical and concerned with health of all the consumer. The Chinese government and manufacturers pay a special attention to food safety. But unfortunately there appeared a serious incident like Melamine added in milk that caused a very bad influence. The Chinese government took active measures to have solved the problem. Here we would like to introduce the food safety status in China and the way Chinese canned fruits manufacturers practice.

① In recent years, due to fast development of food industry and weak agriculture foundation in China there is a common issue that the raw materials growers are scattered in different places so that some of them are not well organized and controlled. Under such conditions few people might make fake products for a loss of morality.

② The government pays a special attention to food safety and give a wide publicity to education, inspection and supervision. The state has established a Food Safety Commission to seek after problems on food safety and practises a Responsibility Inquiring System for officers who have lost their duties in food safety work.

③Manufacturers regard food safety as life line and will take all kinds of measures, e.g., personal training, set up of a guarantee system, source of raw materials, transfer of food safety control to raw material plantation and to strengthen the inspection on raw materials and products.

④Increase the popular food safety sense and build upbrands of products, quality of products and trust of manufacturers. The government periodically issued the inspection results on food and the unqualified food should immediately be off the shelves and called back as to ensure the safety of the Chinese food by these measures.

For canned fruits processing manufacturers, we have several measures as follows:

①Strictly control pesticides and stop applying the forbidden pesticides. The government supervises and manufacturers require farmers to operate following the rules to guarantee the safety of fruits from the source.

②Make a frequent inspection on raw materials, products and supplemental materials;

③Strengthen personal trained and set up various of regulations for food safety.

Environment

Energy , water saving and environmental protection Chinese government gives a wide publicity of low carbon and recycled economy, environment protection, makes laws and rules requesting manufacturers to meet the requirement of environment protection and encourage manufacturers to save energy and reduces consumption. Measures for canned fruits manufacturers to work in low carbon state:

①Water saving: Recycle water in production to reduceamount of water.

②Electricity saving and reduction of steam: Improve work efficiency of generators and continuously sterilize to reduce the amount of steam to be used.

③Water Treatment：Manufacturers should build a standard water treatment facility to drain the waste water away.

④Solid abandoned objects: Further process the peach nuts and utilize them, for skins, residues and other abandoned objects, they can become fertilizers by biological resolution.

3 The Future Directions

Except for the four Key Development Points mentioned above, I would like to put forward three critical issues ,or the future directions. Because Chinese canned fruits industry can advance side by side with foreign colleagues and maintain a healthy development only if we have well done these work.

The three issues for future directions:

Raw Materials Base:

Because of the actual conditions in China, the agriculture is a Small-scale Farmer Economy model that is scatted in thousands of families. Now the government recognized that the future development of the nation is mainly dependent on countryside so that it is necessary to promote modern farm organizing farmers to farm or plant in scale and by standards. It's of same importance for canned fruits industry under such a direction. In recent years many canned fruits processing manufacturers have already conducted a practical operation by two ways:

①Sign an Order for Goods with farmers to adopt a production model of "Company + Base+ Farmers", and practise "Five Intergrations" in production management, that is to unify seedling, technical regulations, prevention and control of plant diseases, quality control and sales of products.

② A leasing operation method may be used to make a centralized control over the land of the farmers by giving them rents and the company cares for plantation, pick up of fruit trees and capital circulations. In practice Chinese manufacturers may search out a better way and the government support manufacturers work more effectively.

Domestic Market:

In future (3-5 years), canned fruits are expected to increase 5 0,000 tons for sale each year. In 2014, the total amount of canned peaches, pears and apricots will break 600,000 tons. The reasons for the targets are:

①The domestic market in China has a great potential and the future increase is mainly at home.

②Rich resources. In recent years raw materials from yellow peaches and other fruits sell well that drive the farmers to be active to grow more peach trees.

- Technical conditions for manufacturers continuously improved and production scale enlarged.
- Manufacturers have gathered experiences in domestic markets and images of brands and products are improved so the amount of consumption is expected to rise up.
- Work to be enhanced to develop the domestic market:
- Give a wide publicity of nutrition for canned fruits and change some people's incorrect recognition on canned fruits. China Canned Food Association have already made multiple publications to mass consumers through mass medium like T.V., newspapers, brochures and etc. to expand the influence of canned fruits.
- Development in products and technology is under an operation and at present more and more varieties of canned fruits in different tastes, and packages , in way of tin, bottle, plastic cups, bottle bags and etc., have been appeared in the market. Now the research department is studying a super high pressure (cold sterilize) and micro wave sterilize technology and already enters mid-term test period that will play an active role in future canned fruits products and their packages.

Strengthen exchanges and Cooperation

The future development for canned fruits industry in China independent on the world canned fruits industry and her large market.

Because of the same trade, everyone's interests are closely linked so it is our common choice to strengthen dialogue and make win development.

We suggest：

- Use the form of Cancon to make dialogues and exchanges. Except for the conference every two years, Cancon may be held frequently to exchange views by establishing a secretariat in turns (responsible by the host country synchronized with the conference) to share information and solve common issues timely.

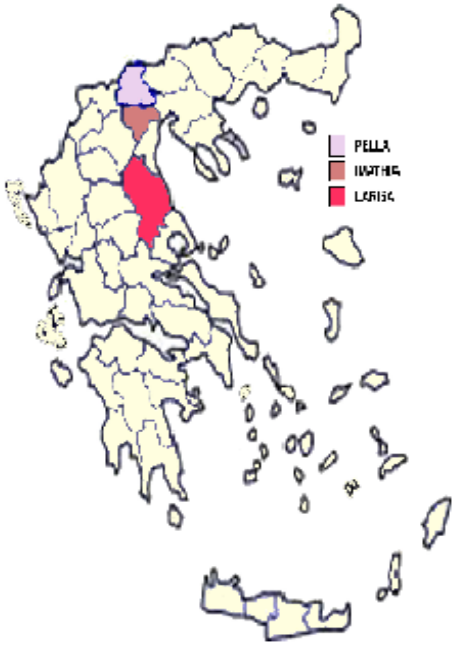
- Encourage exchanges of visits to the industry between the main manufacturing countries.

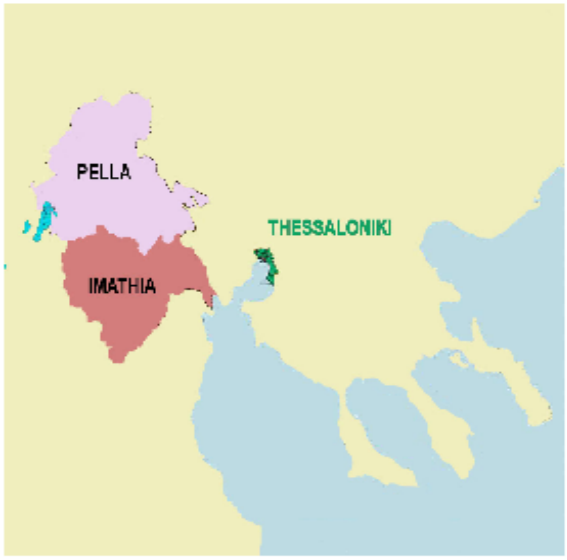
- Support cooperation in the respects of market and technologies and welcome to make various co-operation projects in China.

Appendix 5 – GREECE REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: Kostas Apostolou





Total Agricultural Production Of Deciduous Fruits (All varieties in Tons And Hectares)

	UNIT	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	MT	360	430	400	420	370
	HA	23.9	23	22.3	21.2	19.5
PEARS	MT					
	HA					
APRICOTS	MT					
	HA					

Agricultural Production Of Deciduous Fruits Varieties For The Canning Industries (MT)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	330	370	365	280	
PEARS					
APRICOTS					

Amount Of Fresh Fruit Canned Marketing Year (MT)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	276	285	255	185	
PEARS					
APRICOTS	11.33	10.625	9.91	9	

Amount Of Fresh Fruit Used In Puree Marketing Year (MT)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	54	85	110	95	
PEARS					
APRICOTS					

Total Industrial Production Capacity Basic Cartons (24 Cans / 1 Kg)

		2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	Nº Industries	15	15	15	15	
	Prod. Cap.	20.000.000	20.000.000	20.000.000	20.000.000	
PEARS	Nº Industries					
	Prod. Cap.					
APRICOTS	Nº Industries	7	7	7	7	
	Prod. Can.	2.000.000	2.000.000	2.000.000	2.000.000	
MIXED FRUITS	Nº Industries	6	6	6	6	
	Prod. Can.	2.000.000	2.000.000	2.000.000	2.000.000	

Total Canned Production In Basic Cartons (24 Cans / 1 Kg)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	13.750.000	13.330.000	15.000.000	10.500.000	
PEARS					
APRICOTS	660	625	585	500	
MIXED FRUITS	500	500	415	416.6	

Total Puree Production (Mt, 28/32º Brix)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	18	28	36.6	28	
PEARS					
APRICOTS					

Domestic Consumption Of Canned Products (MT)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	7.245	7.88	7.36	7.5	
PEARS					
APRICOTS					
MIXED FRUITS					

Exports Of Canned Products In Tons (MT)

	2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	249.85	271.8	245.4	233	
PEARS					
APRICOTS					
MIXED FRUITS					

Net Price Paid By The Industry per MT

		2006/2007	2007/2008	2008/2009	2009/20010	2010/2011 (Estimated)
PEACHES	IN EURO	230	230	250-270	180	
	IN USD					
PEARS	IN EURO	190	210	350	230	
	IN USD					
APRICOTS	IN EURO	409	404	480	320	
	IN USD					
MIXED FRUIT						

Appendix 6 - SPAIN REPORT

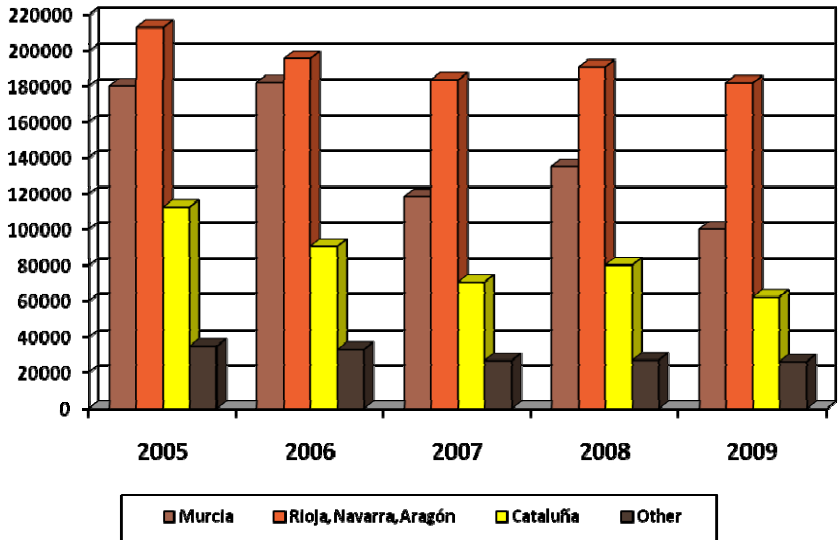
(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: by José García Gómez

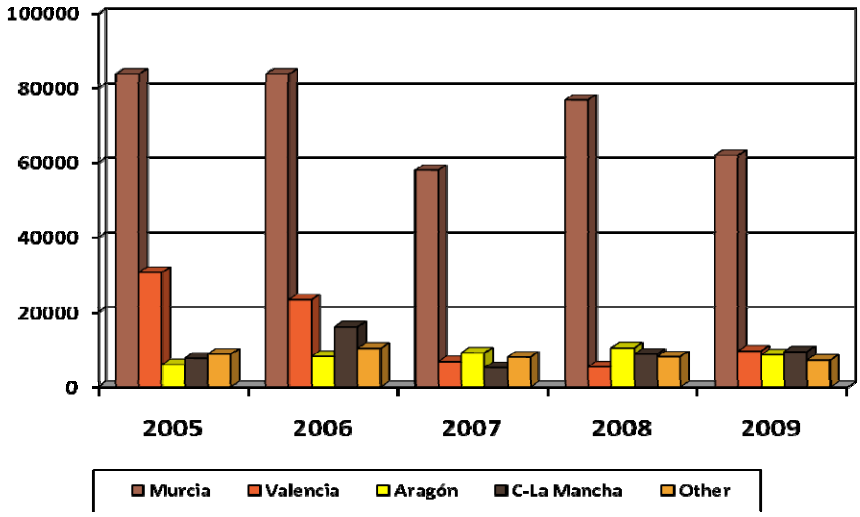
Agricultural Production Of Deciduous Fruits Varieties For The Canning Industries (MT)

	2005	2006	2007	2008	2009
PEACHES	568.9	500.789	398.701	432.635	369.707
PEARS	43.786	41.92	32.821	48.037	32.355
APRICOTS	54.06	69.858	37	47	38.5

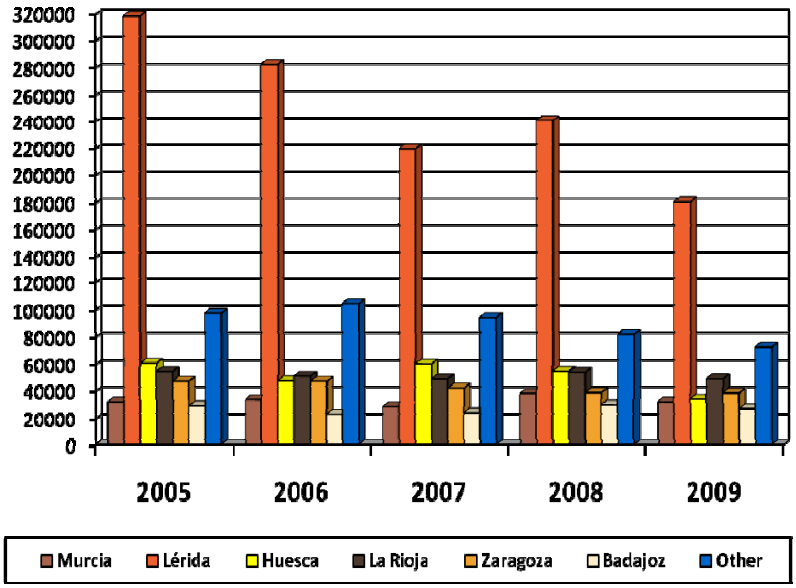
Agricultural Production Of Fresh Peaches For Canning Industry 2005-2009 (MT)



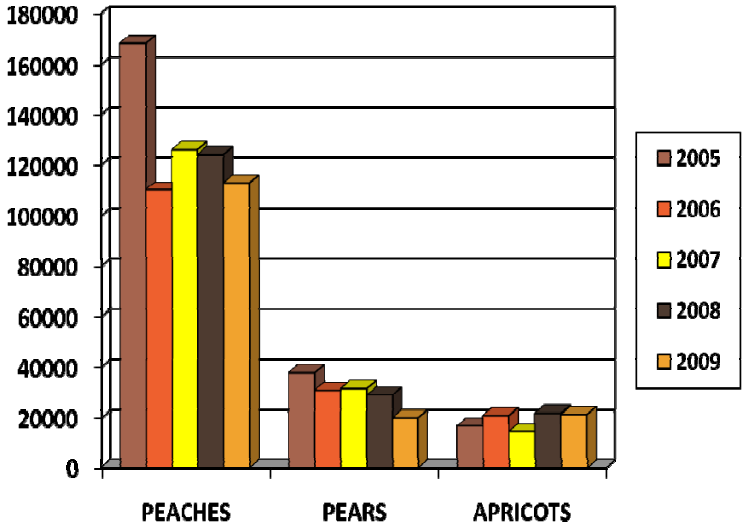
Agricultural Production Of Fresh Apricots For Canning Industry 2005-2009 (MT)



Agricultural Production Of Fresh Pears 2005-2009 (MT)



Amount of Fresh Fruit Processed (Ton)



Canned Deciduous Fruit Situation 2009 Spain

Country	Fresh fruit Canned	Fresh fruit	Basic cartons	Pulp Production	Exports of	Domestic	Farm Gate
	(mt)	For pulp	Canned	(mt)	Canned	Consumption	Fruit Prices
SPAIN		(mt)	(24 x 1 k)	28/32o Brix	Products	(Canned)	(Euro)
					(mt)		
PEACHES	88.6	55	3.700.000	-	22.948	65.652	0,16€/kg
PEAR	22.525	-	530	-	7.305	15.22	0,36€/kg
APRICOTS	5	26	143	-	5.263	-	0,36€/kg
MIXED FRUIT PACK	-	-	-	-	13.567		-

Total Canned Production in Basic Cartons (24 Cans / 1 kg)

	2005	2006	2007	2008	2009
PEACHES	7.190.000	4.530.000	5.320.000	5.200.000	3.700.000
PEARS	982.475	868	750	680	530
APRICOTS	259	191	171	171	143

Exports of Canned Products (MT)

	2005	2006	2007	2008	2009
PEACHES	27.273	44.814	42.381	30.959	22.948
PEARS	11.508	13.696	7.7	7.22	7.305
APRICOTS	4.451	6.189	5.233	3.043	5.263
MIXED FRUITS	12.228	16.441	16.944	19.878	13.567

Appendix 7 – SOUTH AFRICA REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: Wiehahn Victor and Jill Atwood-Palm

Compiled by: S A Canning Fruit Producers' Association and S A Fruit & Vegetable Canners' Association

Delegation: Anthony Dicey (Chairperson, Canning Fruit Producers' Association), Wiehahn Victor (CEO, Canning Fruit Producers' Association), Wynand du Plessis (Chairperson, SA Fruit & Vegetable Canners' Association), Jill Atwood-Palm (General Manager, SA Fruit & Vegetable Canners' Association)

Observers: Febbie van der Merwe (Vice-Chairperson, Canning Fruit Producers' Association), Braham le Roux (Board Member, Canning Fruit Producers' Association), Stephanus Malherbe (Board Member, Canning Fruit Producers' Association), Tshifhiwa Madima (Director: Agro Processing, Department Trade and Industry), Pieter Dirks (Provincial Chairperson of the Food & Allied Workers' Union)

1. Introduction

2. Overview

- Relatively Static Industry
- Labour-intensive industry
- Export driven industry
- Exchange Rate important
- Long term well-established industry
- Premium product producer in the world market
- Partnership with stakeholders across Value Chain

3. Agricultural Production

Total Hectares of Deciduous Trees

	2006	2007	2008	2009
PEACHES	7 038	6 862	6 675	6 513
B C PEARS	2 326	2 147	2 062	1 951
EARLY B C PEARS	1 016	1 043	1 031	1 092
APRICOTS	2 172	2 039	1 943	1 925

Deciduous Fruit – Total (MT)

	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	162 330	159 940	156 232	156 515
PEARS	96 746	102 855	99 337	99 976
APRICOTS	34 940	52 800	43 913	49 542

Fruit For Canning (MT)

	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	100 920	97 830	95 481	99 119
PEARS	52 450	51 700	46 467	51 190
APRICOTS	25 400	38 900	31 100	35 488

Fruit For Pulp (MT)

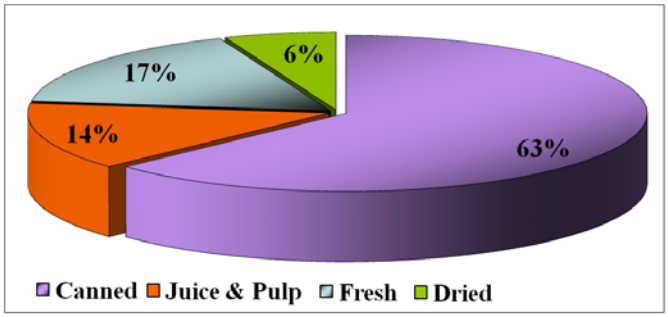
	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	25 400	28 100	27 750	21 400
B C PEARS	10 558	13 650	16 610	13 790
APRICOTS	7 950	12 300	11 120	11 750

4. Grading Results (Fresh Fruit)

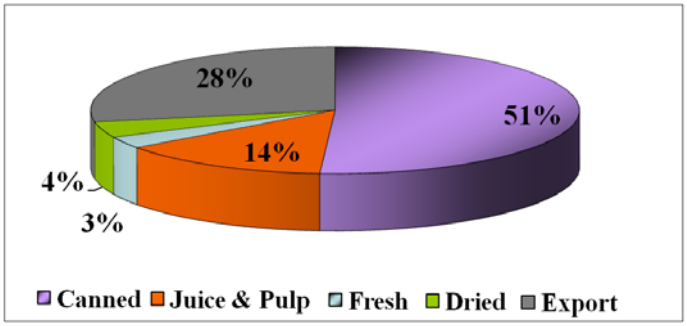
	GRADE 1	GRADE 2	GRADE 3
APRICOTS	93.4%	5.0%	1.5%
CLING STONE PEACHES	95.0%	3.1%	1.9%
BC PEARS	96.6%	1.9%	1.5%

5. Marketing Channels

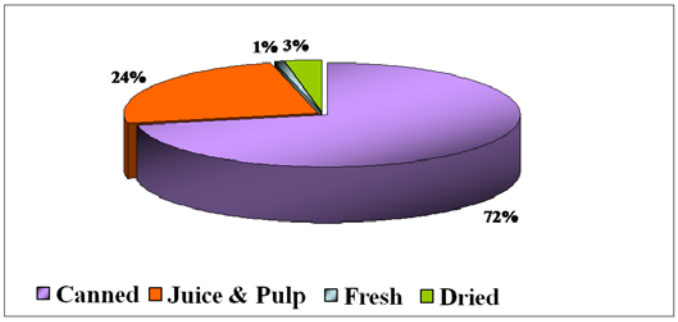
Yellow Cling Peaches (156515 tons)



Bon Chretien Pears (Bartlett / Williams) (99976 tons)



Bulida Apricots



6. Prices Of Canned Fruit

- Nett price is the average price paid to farmers
- A formula has been negotiated for fruit prices
- Average 94% first grade fruit
- Excluded Bonuses
- NO transport, receiving depot, grading cost have been taken into account

Nett Price Paid by Industry (R/ton)

	2005/2006	2007/2008	2008/2009	2009/2010 Estimated	
PEACHES	1 328	1 797	2 139	1 910	$US263
PEARS	1 054	1 460	1 708	1 609	$US222
APRICOTS	989	1 518	1 692	1 552	$US214

7. Total Canning Production

Basic Cartons (24 Cans / A2.5)

	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	3 522 260	3 056 002	3 045 700	3 054 986
PEARS	1 079 854	1 305 931	1 240 288	1 282 971
APRICOTS	986 108	1 016 828	1 055 584	1 153 785
FRUIT COCKTAIL	1 810 990	1 576 823	1 541 188	1 478 403

Total Pulp Fruit Production Metric Tons (28/32 Brix)

	2006/2007	2007/2008	2008/2009	2009/2010
PEACHES	14 936	14 225	13 458	12 758
PEARS	4 046	4 196	6 336	6 695
APRICOTS	4 452	8 840	6 565	8 841

8. Exports Of Canned Products

Basic Cartons (24 Cans / A2.5)

	2006	2007	2008	2009
PEACHES	2 718 687	3 147 475	3 119 475	2 975 101
PEARS	1 832 379	1 338 081	1 543 889	1 431 616
APRICOTS	1 741 717	1 255 354	1 288 434	1 162 677
FRUIT COCKTAIL	1 625 000	1 528 939	1 256 263	1 265 253

Domestic Consumption Of Canned Products

- Relatively static market over 10 years
- Domestic Consumption ±15% of the production
- Peaches +0,6 million basic cartons
- Pears + Apricots + Cocktail +0,4 million basic cartons
- Marketing campaign focusing on local market to increase the consumption of canned fruit

Appendix 8 – UNITED STATES REPORT

(Note: Before use, confirmed all data against the original MS PowerPoint presentation available from admin@fgv.com.au)

Presented by: Rich Hudgins on behalf of the California Canning Peach Association

U. S. Canned Fruit Industry Overview

The California cling peach industry currently consists of 3 canners and 2 freezers. The canners (Del Monte Foods, Seneca Foods, Pacific Coast Producers) process over 90% of California's annual production.

The canned pear industry on the west coaast has evolved into two distinct areas; Oregon & Washington (which produces only grade pack pears), and - California (which produces produces fruit coctail and mixed fruits packs).

Ther are 5 pear processors operating in the north west. The three largest are Monte Foods, SnoKist Growers and Northwest Packing. There are 3 pear processors operating in California - Del Monte Foods, Seneca Foods, Pacific Coast Producers.

The California apricot industry consists of 3 canners; Del Monte Foods, Seneca Foods, Pacific Coast Producers accounting for more than 60% of all processing use. The remaining processing volume consists of freesing and dried apricot use.

The utilization of peaches, pears and apricots for puree, pulp and concentrate is relatively minor; accounting for no more than 5% of the total raw product supply.

U. S. Canned Fruit Processors

Peaches; Del Monte Foods, Seneca Foods, Pacific Coast Producers

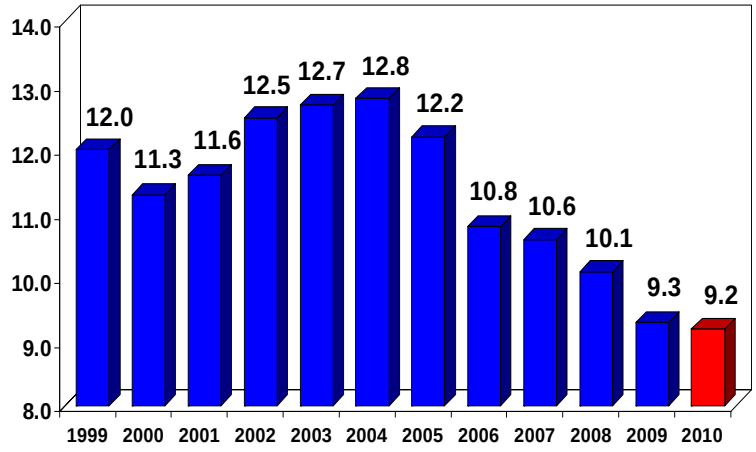
Pears; Del Monte Foods, Seneca Foods, Pacific Coast Producers, SnoKist Growers, Northwest Packing, Independent Food Processors, Trultt Bros.

Apricots; Del Monte Foods, Seneca Foods, Pacific Coast Producers

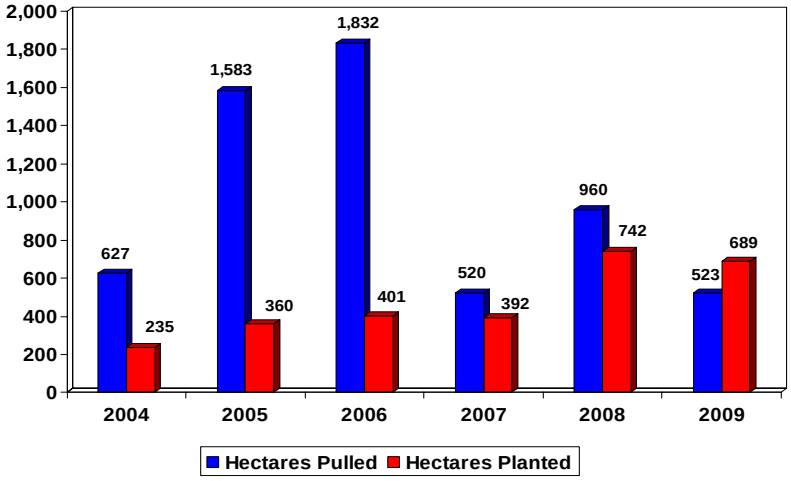
Consolidating U. S. Processed Peach Industry in California

- 1952 42 Canners
- 1972 17 Canners
- 2010 3 Canners, 2 Freezers

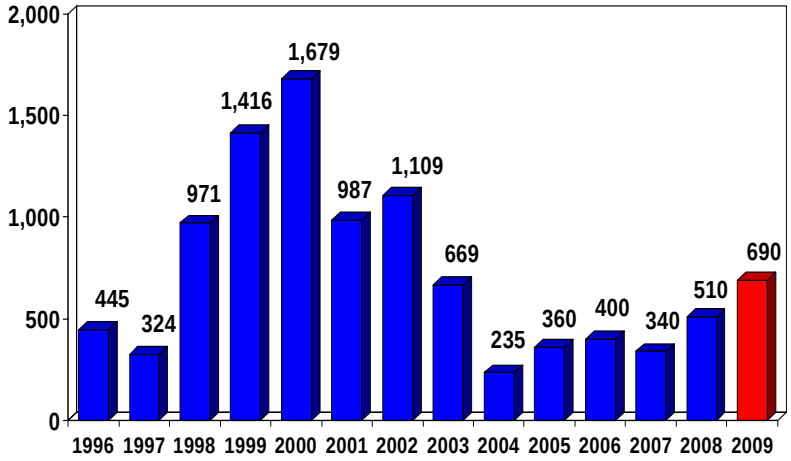
California Cling Peach Bearing Hectare Trends 1999 – 2010 (Thousands of Hectares)



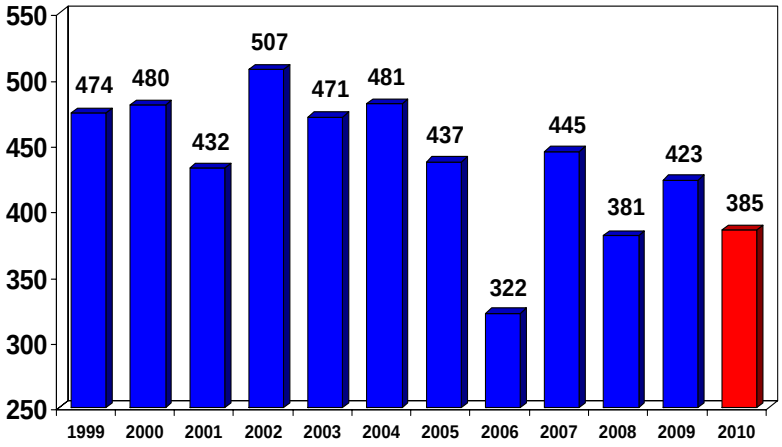
Cling Peach Hectares Pulled vs. Hectares Planted 2004 – 2009 Hectares



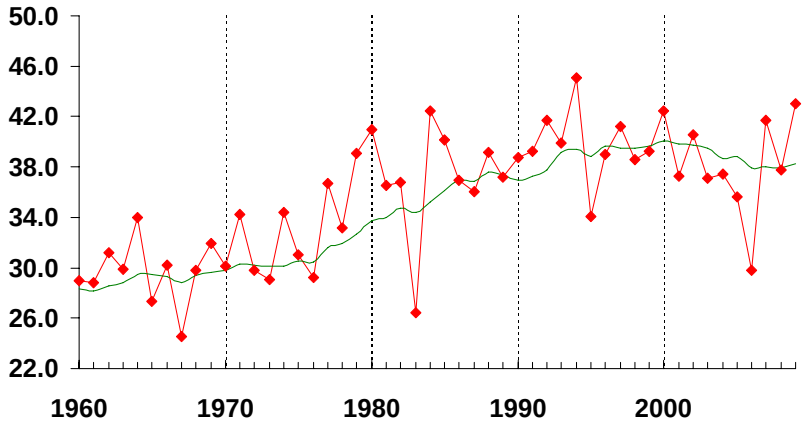
California Cling Peach Hectares Planted 1996 – 2009



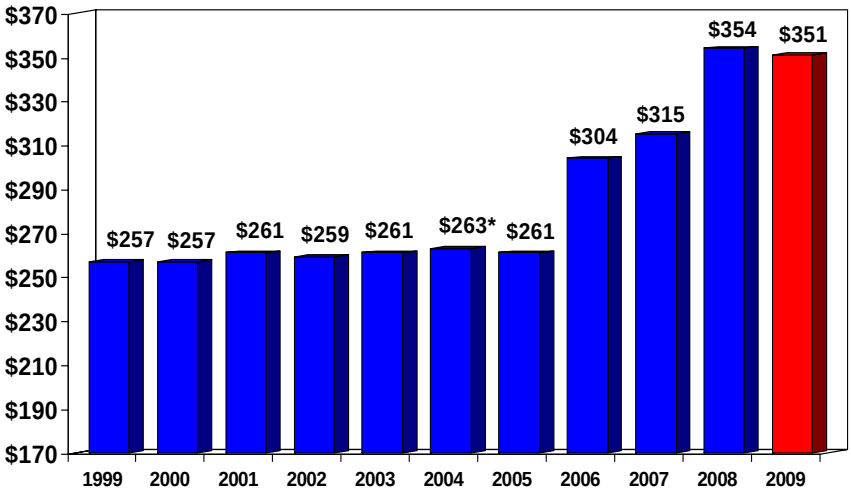
Cling Peach Delivery Trends Total Tons to All Processors 1999 – 2010 (Thousands of Metric Tons)



California Cling Peach Production Trends Yield 1960 – 2009 (Metric Tons / Bearing Hectare)

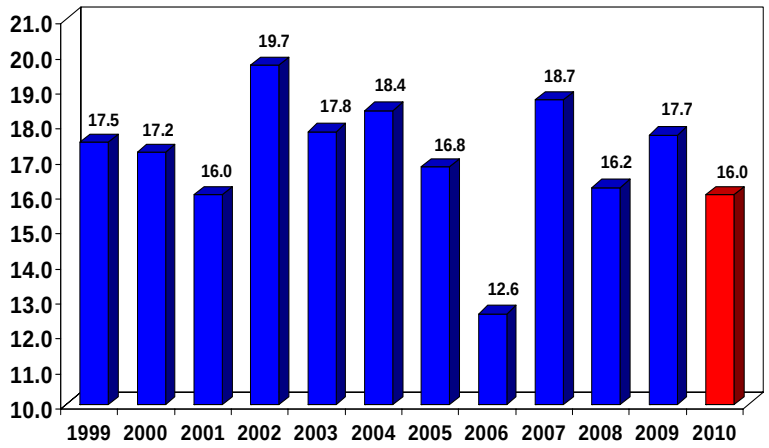


California Cling Peach Price Trends 1999 – 2009

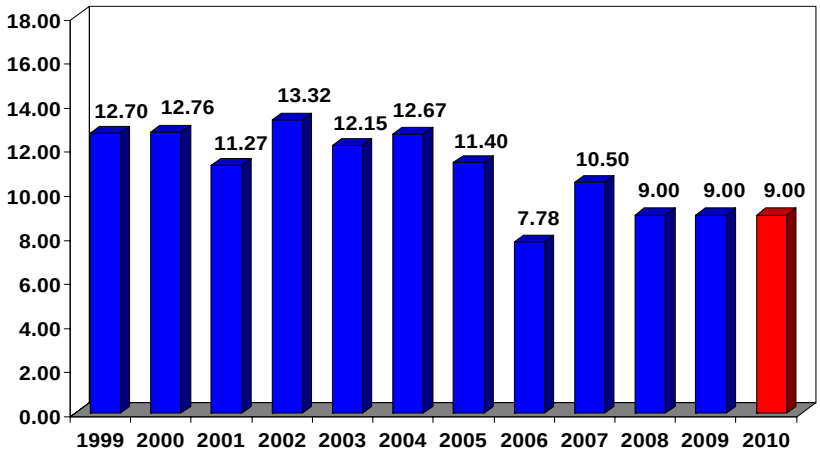


*Average Value Ton – Converted to Same Basis as 1992 – 2003

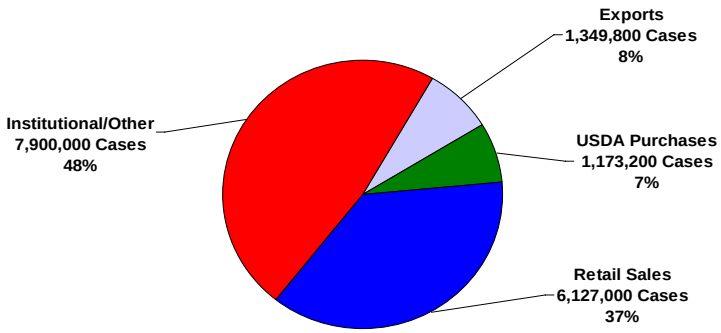
California Cling Peach Pack Trends 1999- 2010



California Fruit Cocktail & Mixed Fruit Pack Trends 1999 – 2010 (24/2 ½ Basic Cases (Millions))



U. S. Canned Peach Market Segments 2008 – 2009 Marketing Year



Total Sales: 16,550,000 Cases

Canned, Fresh, Frozen: Nutritionally Similar

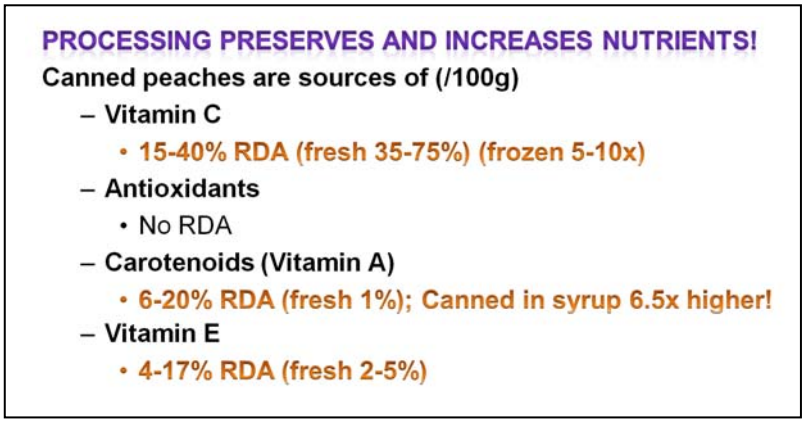
- A healthy eating pattern includes a variety of fruits and vegetables.
- All forms contribute good nutrition.
- For some nutrients, canned fruits/vegetables provide more than fresh.
- Exclusively recommending one form over another ignores the benefits of each and limits consumer choice.
- By the time food is consumed, all forms may be nutritionally similar.

Source: Rickman et al. "Nutritional Comparison of Fresh, Frozen and Canned Fruits and Vegetables," Journal of the Science of Food and Agriculture, March and April, 2007

In the Can: "Phytos" Peach Nutrition Study

- Certain key nutrients increase with canning and freezing.
- Carotenoid levels (carotene and lycopene) significantly increase with canning and freezing.
    - Canned peaches: 7x higher than in fresh
    - Frozen peaches: 10x higher than in fresh
- Vitamin E were higher after processing.
    - Canned peaches: 2.5x higher than in fresh
    - Frozen peaches: 3.7x higher than in fresh
- Picked at optimum nutrition, processing locks in key nutrients and retains them until served.

Source: Durst. Oregon State University, Linus Pauling Institute, 2009 (Reported in Hudgins, "Let's Can the Nutrition Misperceptions," Cling Peach Review, Fall/Winter 2009



Fruits and Vegetables ... For Overall Health

"…all forms of fruit and vegetables, especially whole and cut-up, as healthful options"
2005 Dietary Guidelines: 2 cups fruits, 2½ cups vegetables daily (2000 calorie daily diet)

- Most women daily: 2 cups fruit … 2½ to 3 cups vegetables
- Most men daily: 2 to 2 ½ cups fruit … 3 to 4 cups vegetables
- Most teens daily: 1½ to 2 ½ cups fruit … 2½ to 4 cups vegetables

- Children (9-13 years) daily: 1½ to 2½ cups fruit … 2 to 3 ½ cups vegetables

Fruits and Vegetables … To Reduce Cancer Risk

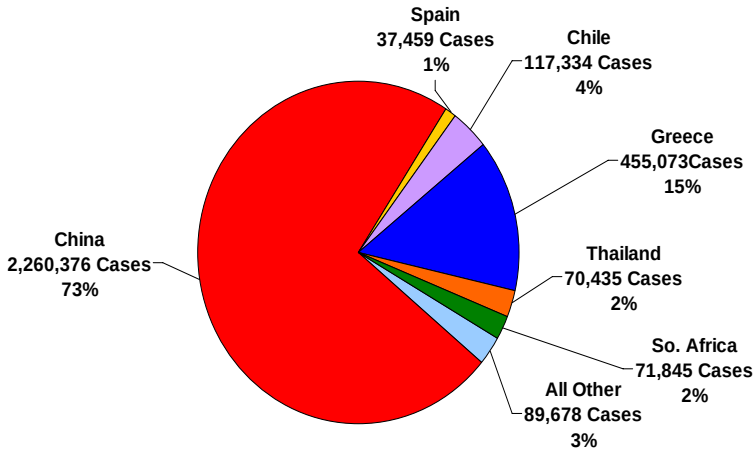
To protect against some cancers, a healthy diet emphasizes plant sources of food …

- "5 or more servings of fruits and vegetables daily to help prevent cancer"
- "Contain important vitamins, minerals, fiber, phytochemicals and antioxidants that appear to protect against some cancers"
- "Usually low in calories"
- "In general, fruits and vegetables with the most color -- green, red, yellow, and orange -- have the most nutrients." American Cancer Society

Canning Peach Mechanization Research Fund

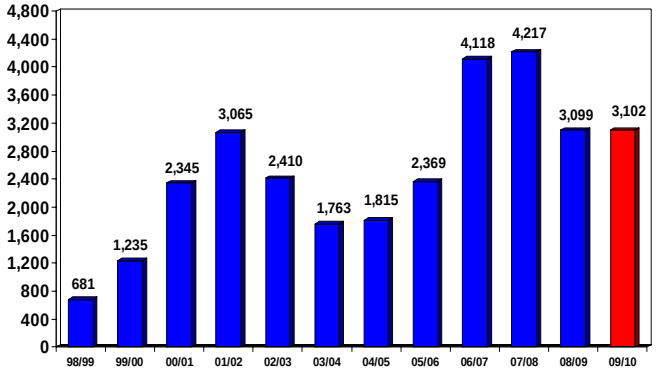
- As part of our agreement with processors to jointly fund peach mechanization research, CCPA formed a new entity called the Canned Peach Mechanization Research Fund.
- Growers and processors will each contribute 50¢/ton in 2008, 2009, and 2010 to fund the organization.
- The organization's activities will involve the joint grower/processor funding of research work and demonstration projects aimed at reducing the labor cost for growing and harvesting cling peaches.
- The corporation is governed by a Board of Directors consisting of 10 people (5 processor representatives and 5 CCPA representatives). Directors will hold office for a three year term.
-

U. S. Canned Peach Imports 2009 – 2010 Marketing Year

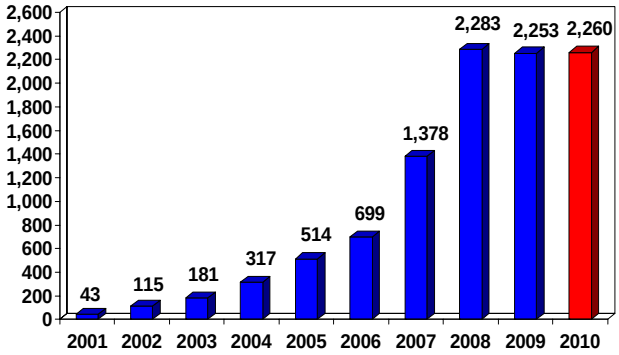


Marketing Year Total: 3,102,200 Cases

U.S. Canned Peach Import Trends 1999 – 2010

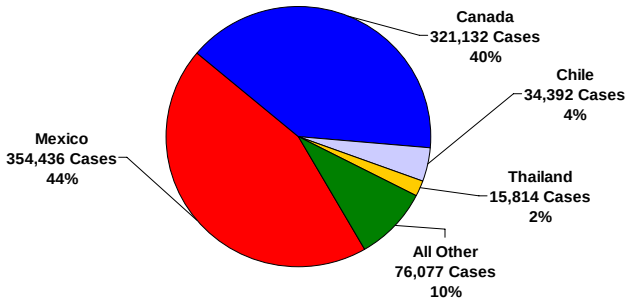


U. S. Canned Peach Imports from China 2001 – 2010



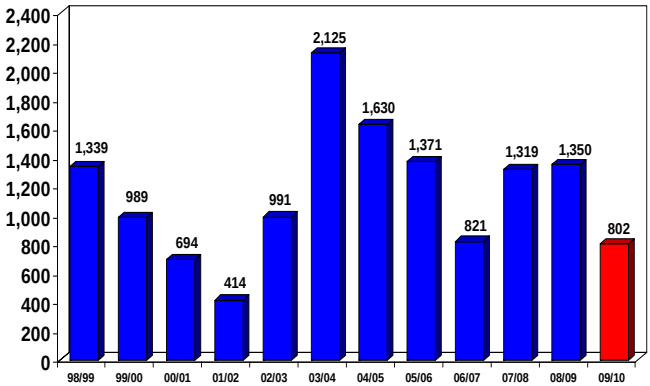
Imports from China have tripled since 2006.

U. S. Canned Peach Exports 2009 - 2010 Marketing Year

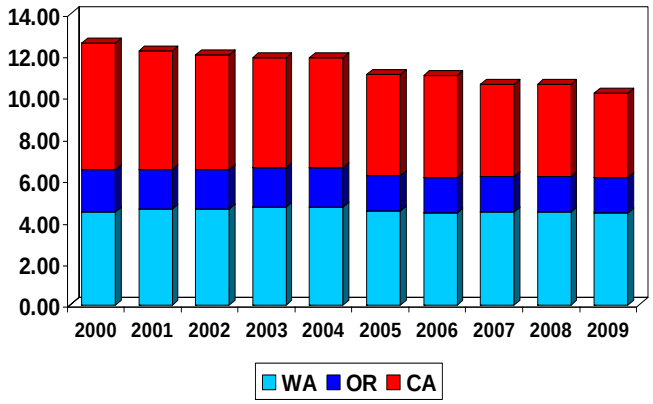


Marketing Year Total: 801,851 Cases

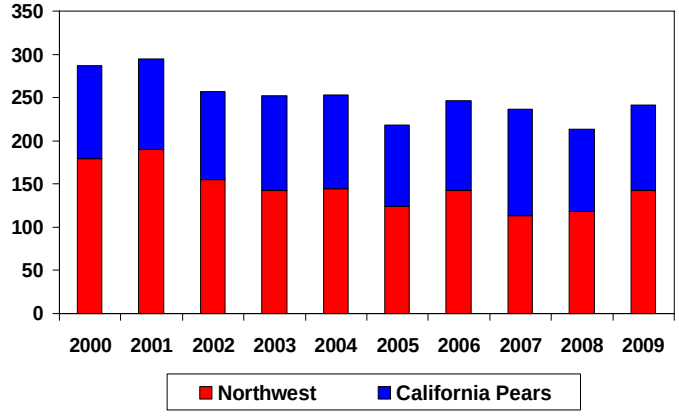
U. S. Canned Peach Export Trends 1999 – 2010 (Thousands of Cases)



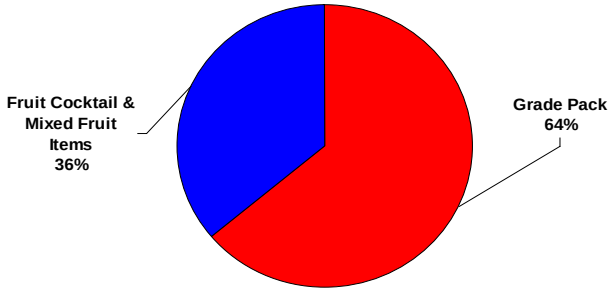
West Coast Bartlett Pears Bearing Hectare Trends 2000 – 2009 Bearing Hectares (000's)



West Coast Pear Delivery Trends Volume Utilized for Canning (Thousands of Metric Tons)

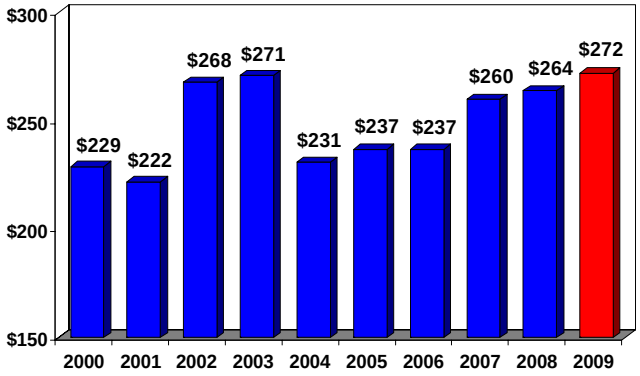


Utilization of West Coast Canned Pear Tonnage

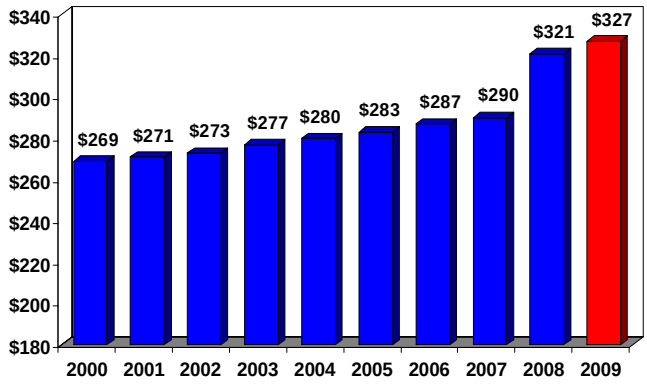


Total 2009 Deliveries: 241,000 Metric Tons

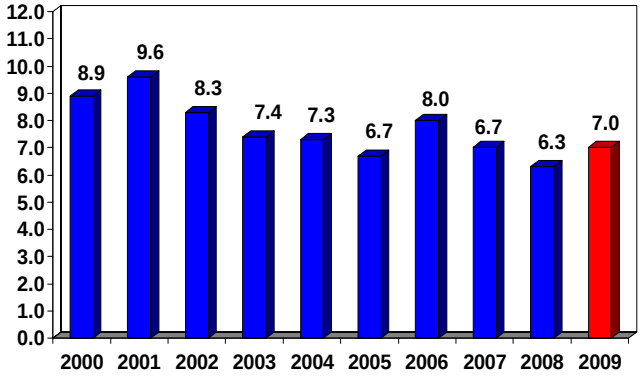
Northwest Canning Pear Price Trends Bartlett Pears – No. 1's 2000 – 2009 $ per Metric Ton



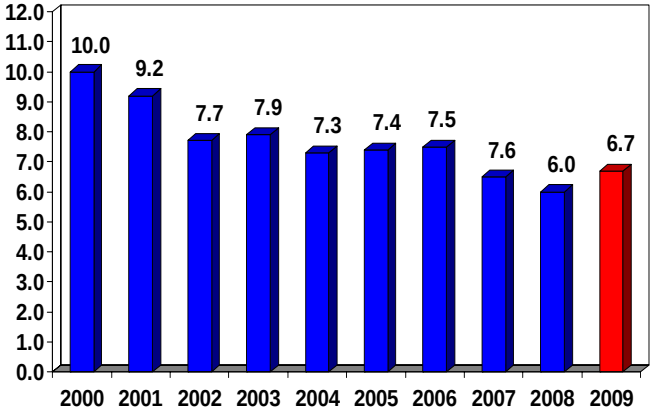
California Canning Pear Price Trends Bartlett Pears – No. 1's 2000 – 2009



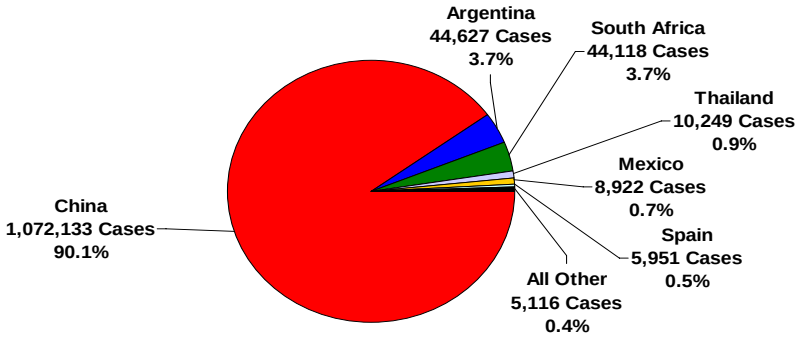
West Coast Canned Bartlett Pear Pack Trends 2000 – 2009 24 / 2½ Basic Cases (Millions)



West Coast Canned Bartlett Pear Sales Trends 2000 - 2009 24 / 2½ Basic Cases (Millions)

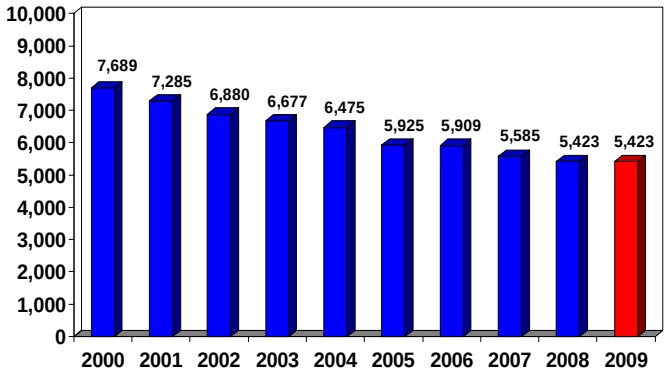


U. S. Canned Pear Imports 2009/10 Marketing Year



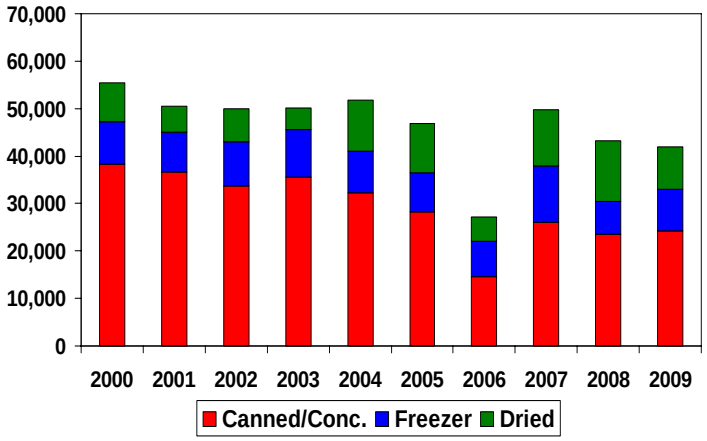
Calendar Year Total: 1,191,116 Cases

California Apricots Bearing Hectare Trends 2000 – 2009 Bearing Hectares

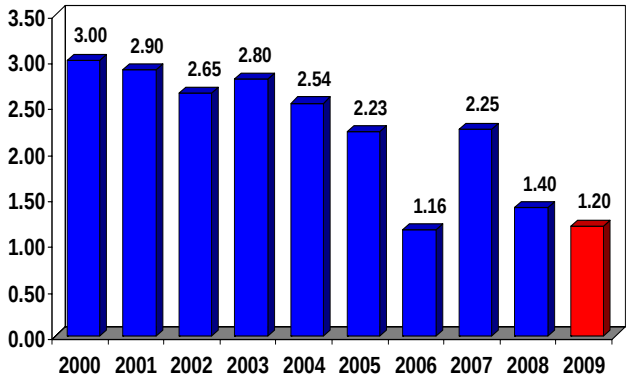


Apricot acreage has declined 30% since 2000.

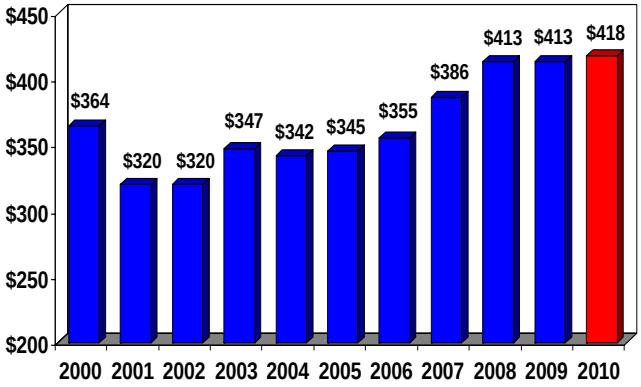
California Apricot Processing Trends 2000 – 2009 Thousands of metric tones



California Canned Apricot Pack Trends 2000 – 2009 24/2 ½ Basic Cases (Millions)



California Canned Apricot Price Trends 2000 – 2010 $ per Metric Ton



U. S. Canned Apricot Imports 2009/10 Marketing Year