

Horticulture Innovation Australia

Final Report

Market Development for the Apple Industry

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Apple and Pear Australia Ltd (APAL)

Project Number: AP11016

AP11016

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Summary

APAL has completed delivery of the *Market Development for the Apple Industry* (AP11016). The project ran from 12 September 2011 to 8 February 2016. The project funded the position of a Market Development Manager (MDM) at APAL to support domestic marketing initiatives and drive export development across the apple and pear industry.

The original objective of the project at its inception was to provide technical resources to assist with the Aussie Apples marketing program and other initiatives mounted by APAL and HIA to help change the mindset of Australian apple growers to an attitude of international competitiveness, whether selling on the domestic market or overseas.

The work plan from year one was revised in March 2012 (six months into the project) to better align with activities and KPIs of the *Apple and Pear Industry Strategic Plan - New Horizon*. The revised and recast work plans also dovetailed with the APAL Annual Operating Plan. Previously the work plans focussed on activities to match the objectives of the project proposal alone, without relating them to the very strategies which had been developed to ensure the long term profitability and sustainability of the apple and pear industry.

The scope of the project transitioned from delivering a range of domestic market activities to that of a project with a greater focus on export. Which included identifying appropriate export markets, fostering a culture of export amongst growers and communicating export knowledge to industry.

Keywords

Market Development Manager, APAL, Apple and Pear Australia Ltd, Apples, Pears, exports.

Introduction

APAL was contracted to deliver the *Market Development for the Apple Industry* (AP11016) project for the period 12 September 2011 to 12 September 2014 with an extension granted through to 8 February 2016.

At the time of the projects development, the apple and pear industry recognised the need for further development of the domestic and export markets in the face of increasing international competition, specifically imports from China and New Zealand. The project sought to develop an export culture amongst growers, improve industry knowledge of export markets and act as the liaison between industry and the 'Aussie Apples' marketing campaign led by HIA.

The project was initiated and developed by APAL CEO Jon Durham and Industry Services Manager Annie Farrow. Cassia Ferguson led the project from the project commencement in September 2011 through to June 2012, then it was taken over by Claire Fitchett (August 2012 - December 2014) and then to Olivia Tait (January 2015 – ongoing).

The Market Development project was essential in achieving several of the goals of the 'New Horizons' industry strategic plan. In particular, the MDM focused on expanding existing, and developing new, export markets for Australian apples and pears. Critical to achieving these aims was and continues to be the adoption of a greater export mind set and culture within the industry, which the MDM actively pursued. In addition, the project supported the implementation of domestic market activities, including the Aussie Apples and Rediscover the Pear campaigns. This role also oversaw the InfoPome data collection project, which allows industry to make informed business decisions about stock movements and pricing based on current stock on hand data.

Methodology

To deliver the project APAL appointed a MDM who oversaw the project's delivery including all outputs with the assistance of other APAL staff members as required; Industry Services Manager, Technical Manager, Communications Manager, and Administrator.

Every year, the MDM developed an annual operating plan to further guide activities that would be completed every year to fulfil the project's milestone objectives.

An annual work plan was submitted as part of Milestone Report 102 (October 2011). The work plan detailed objectives, activities and timelines required to achieve the expected outputs and outcomes targeted under the project. That work plan was subsequently reviewed and extensively recast to better align specific activities and KPIs with the Actions and Strategies of the Apple and Pear Industry Strategic Plan New Horizons 2015. It was important that the project and the prescribed deliverables dovetailed with the APAL Annual Operating Plan, not only to ensure that the strategies were aligned but also to ensure that the allocated resources were utilised as efficiently and effectively as possible.

Previously the work plan focussed on activities to match the objectives of the project proposal alone, without relating them to the very strategies which have been developed to ensure the long term profitability and sustainability of the apple and pear industry.

Additional input was continually received from HIA, APAL staff and Board, the mid-term review findings and incumbent project leaders to ensure the latest insights, market intelligence, ideas and expertise was used to deliver the project.

Outputs

The main aspirational output arising from the project was to be the development of a market-focused mind set amongst growers, packers and the supply chain: realising that for every sale on the domestic market or overseas it must compete with apples from another country.

Specific high level outputs were identified as being:

- A unified set of (voluntary) quality guidelines for use by growers and packers to underpin the Aussie Apples brand;
- Guidelines as to how the Aussie Apple brand will be used by growers and pack-houses and the supply chain;
- A knowledge base for the industry to access data and intelligence on market parameters;
- Refinement of the Export Market Strategy, the development of export market plans and execution of pilot trades; and
- Resolution of technical market access issues.

Whilst changes were implemented along the way to improve the feasibility of delivery and relevance to industry, the main outputs flagged at the outset of the project were delivered in addition to a number of other outputs covering the following areas;

- Management of the InfoPome project AP11033;
- Input into the formulation and execution of the Apple and Pear Asian Market Development Project AP11023; and
- Secretariat role of the Industry Advisory Committee (IAC)

The following project objectives were determined;

- 1. Produce high quality apples (and pears) at internationally competitive prices**
 - Enhance orchard productivity and management
 - Facilitate variety transition to match changing markets
 - Improve consistency of product quality to match consumer expectations
- 2. Expand exports**
 - Define and understand overseas markets
 - Develop collaborative approach to market
 - Resolve technical market access issues in target markets
 - Monitor export market competitor activities
- 3. Stimulate domestic demand**
 - Coordinate promotion and marketing programs
 - Enhance industry value within the community
- 4. Industry resources and capability building**
 - Adapt industry services to meet the needs of growers
 - Improve quality and flows of information

Produce High Quality Apples (and pears) at Internationally Competitive Prices

Quality Guidelines

As part of the original project proposal, it was determined that the industry and subsequently consumers, domestic and international, would benefit from the development of a set prescriptive quality guidelines targeting the industry at the grower and packer level. The objective of the guidelines being to help improve the quality of Australian grown apples and improve the eating experience and subsequently increase the purchase of Australian apples.

The delivery of this output was delayed as accountabilities for delivery oscillated between APAL and HIA. The final version of the guidelines were published on 19 Jan 2016 on the APAL website (<http://apal.org.au/supply-chain/trade/aussie-apples-quality-specs/>) as the *Aussie Apples: Guidelines, specifications and product description language* document. The guidelines covered 14 varieties, including the mostly widely grown (Cripps Pink, Royal Gala, Red Delicious, Granny Smith and Fuji) and were presented as a Product Description Language (PDL) which is a set of photographs and definitions used to describe a product. The guide focussed on key quality characteristics and described them in a way that is readily measured. In this way, a PDL can be used by growers, packers, processors, wholesalers, exporters and retail customers to identify what quality attributes are important to them. It also gives them the opportunity to specify and negotiate what style of blemish, colour, shape, sweetness or other parameter is available to supply or acceptable to purchase. The images were published with corresponding colour images describing the following quality parameters; shape, misshape, colour, skin marks, russet, sunburn, blush and hail damage

To accompany each variety a reference guide was included which detailed the following; colour, appearance, eating quality, maturity, brix, firmness, size, shape, defects, presentation, treatment and pulp temperature.

Quality Training and Awareness

APAL produced two DVD's to promote and educate domestic and international markets about Australian apples and pears.

The first was a pear industry DVD "Australian Pears – Delivering Quality", filmed in Shepparton and Coles. The purpose of this DVD was to introduce Asian buyers who are unfamiliar with pears to the category and help drive the message about careful handling and ensuring fruit quality for customers. The DVD was also been subtitled in Thai and was used extensively in the Thai training sessions held with warehouse and retail floor staff. The video is also published on APAL's YouTube channel, <https://www.youtube.com/watch?v=Hf4Mz9PrJ6c>.



The Aussie Apples quality guidelines were published and distributed in January 2016.

The second DVD utilised existing footage from the pear DVD and incorporated additional footage of Orchards (Montague Fresh), packhouse (First Mile) and product usage shots, filmed at Lee Ho Fook, using a high profile Asian Chef. The purpose of the DVD was to provide the viewers with an insight and understanding of the Australian apple and pear industry. The key messages focuses on the quality of Australian fruit, the clean, green and pristine growing conditions and environment, the sophistication of the sorting, processing and packing technology and the diverse range of usage



Australian apples and pears - delivering quality



Apple and Pear Australia Ltd (APAL)

Channel settings

APAL's Market Development Manager Olivia Tait with apple grower Scott Montague in the 'Delivering Quality' video.

options, particularly targeting Asian consumers with Asian inspired recipes. The intended audience includes inward buyer missions and delegations, overseas retail and foodservice buyers, trade fair visitors and retail selling staff. The video is also published on APAL's YouTube channel, <https://www.youtube.com/watch?v= VEMpHREk5w>.

Variety Transition

The MDM participated in Prevar's Apple Futures two day workshop in Melbourne. This workshop was designed to seek broad industry input into varieties that will meet the needs of customers in 10, 20 and 50 years.

The MDM worked with DPIV to determine the terms of reference for the consumer reference research into the new red blush pear varieties, ANP-0131 and ANP-0118. The testing is scheduled to take place in Asian markets to determine the level of acceptance in terms of colour, pressure/firmness and brix/sweetness. These pears have been specifically bred to meet the needs of the Asian customer base.

Expand Exports

Project AP11023 Apple and Pear Asian Market Development

The MDM played an integral role in managing the initial preparation of the then Vic DPI project proposal AP11023 - Apple and Pear Asian Export Market Development and right throughout the delivery of this three year program. This activity focused on developing a work program to identify priority markets, establish study tours and workshops to foster better understanding of markets and relationships between trading entities, the promotion of Australian Pink Lady® apples in key markets.

The following outputs were delivered by the MDM;

- Organisation of study tour to Thailand, China and Hong Kong in partnership with Department of Environment, Primary Industries Victoria (DEPIV) from 28 August – 8 September 2012. Participants represented most of the major growing areas across Australia (WA, SA, NSW, VIC). The participants gained first-hand knowledge of product requirements in these key export markets, enabling them to make better decisions about where they export and any requirements they need to meet in order to succeed. The tour concluded in Hong Kong with participation in the Asia Fruit Congress and Asia Fruit Logistica trade show.



Australian apple and pear growers on an Asian study tour in 2012 with APAL.


- Completion of two export workshops in Victoria (Goulburn Valley and Yarra Valley) in July 2012. The workshops were designed to foster a culture of exporting amongst high potential growers. This was in light of potential reduced market size with New Zealand and Chinese apples having access to Australia. The workshops were held in the Goulburn Valley on 29 June (led by Jon Durham- MD, APAL) and the Yarra Valley on 4 July (led by Annie Farrow- Industry Services Manager, APAL). Bryan Balmer from DPIV Victoria presented at both workshops. Each of the seminars attracted approximately 10-12 growers to the invitation only events.
- Delivery of four export workshops throughout Australia held in November 2012 to foster an export culture within industry as part of AP11023 project. The workshops were held in Stanthorpe, Batlow, Adelaide and Donnybrook.


In-Bound Importer Tours

In-bound importer tours are a very effective way of engendering loyalty, support and a greater appreciation of the Australian apple and pear industry. A number of importer tours were delivered over the course of the project, some of which were organised by the MDM and some that were facilitated by the MDM.

- Delivery of an inbound Asian Pink Lady importer tour from 28 April-2 May 2013. The delegation comprised nine importers and retailers from China, Malaysia, Singapore and Thailand, including media representatives from Malaysia and Indonesia. The program included visits to four orchards in two regions of Victoria, and visits to three orchards and the Lenswood Co-operative in South Australia. Two networking dinners were held for the delegates to meet with Team Australia export group members, one in Melbourne and one in Adelaide. As a direct result of this importer tour, Australian growers began exporting

product to Malaysia, meeting a key criteria for this project- increase volume of apple exports.

- Coordination of a group of 30 Asian pome fruit buyers to the Goulburn Valley. This group was in Australia as part of a Victorian Government sponsored Food and Beverage Trade Week. The pome fruit buyers were taken to Plunkett Orchards and Jeftomson and participated in a networking lunch with local growers. This visit facilitated closer relationships between growers and buyers and improved awareness about product requirements. Buyers were particularly interested in the new pear varieties ANP0118 and ANP0131. In conjunction with this visit, the MDM coordinated a visit to Tasmania for interested buyers. 2 Vietnamese, 1 Chinese and 3 Filipino buyers participated in a Tasmania visit program and all were impressed with the quality of the apples. Price will be the biggest hurdle for these markets, though the Chinese delegate was prepared to pay a high price to secure Tasmanian apples.
- End-to-end organisation and delivery of the inbound Pink Lady™ importer/retailer visit from 29 April- 3 May 2014. The visit included 10 Asian buyers from Thailand, Malaysia, Singapore and China. The itinerary included visits to Tasmanian orchards (for four participants), Pink Lady briefing session by APAL, networking events, visits to Montague Narre Warren, retail visits, visit to Lenswood Co-operative and orchards.

Asian fruit buyers visit Hansen Orchards, Tasmania, on an in-bound study tour.
- Worked with State Government Victoria Department of Economic Development, Jobs, Transport and Resources (DEDJTR) on the agri-food component of the inaugural *Victorian Invitation Program*. The aim of the in-bound mission was to build on Victoria's reputation for premium fresh produce and prepared food, quality agricultural land, clean water supply and innovative production systems. The program was designed for the visiting delegates to gain insights into Victoria's capabilities, competitive advantages and strong food and regulatory systems and processes.

APAL's Market Development Manager Claire Fitchett (rt) shows Asian fruit buyers around the Melbourne Wholesale Markets.

For the 20 fruit focussed delegates, some of the key activities that took place during the three day visit included;

- An early morning visit to the Melbourne Wholesale Market;
- A dedicated product showcase event held in the Yarra Valley;
- A visit to the Montague Fresh orchard which included an orchard visit, fruit tasting and an informal networking opportunity;
- An agri-food networking dinner involving around 80 international delegates and a range of Victorian exporters and industry leaders; and
- Business matching event involving up to 70 Victorian exporters and 80 international delegates on Friday 13 March 2015. Montagues, Jeftomson and Plunkett Orchards took part in this session.

Out-bound Study Tours and Trade Missions

Out-bound study tours were identified as being a vital tool for grower/exporters to gain first- hand insights into key markets they were targeting. After a period of near dormancy for many growers and exporters, this opportunity laid the foundation for developing in-market relationships with key importers and retailers, helping them gain an understanding of the market, competitors, customer preferences, supply chain capabilities etc.

- Organisation of study tour to Thailand, China and Hong Kong in partnership with DEPIV from 28 August – 8 September 2012. Participants represented most of the major growing areas across Australia (WA, SA, NSW, VIC). The participants gained first-hand knowledge of product requirements in these key export markets, enabling them to make better decisions about where they export and any requirements they need to meet in order to succeed. The tour concluded in Hong Kong with participation in the Asia Fruit Congress and Asia Fruit Logistica trade show.
- Participation in DPIV study tour to Shanghai and Australia Fresh study tour to Taiwan, before and after China FVF 2012. Included meetings with importers and retailers and specialist companies such as online and TV sales companies which can provide opportunities for Australian apple and pear exporters.
- Delivery of an outbound study tour to Asia (Malaysia, Thailand, Hong Kong) in August/ September 2013. The study tour comprised apple and pear growers and exporters from WA, SA and Victoria, along with Bryan Balmer and Aimee McCutcheon from DEPIV who are project partners of APAL in AP11023. The visit included meetings with importers and retailers in each market, visits to wholesale markets and retail outlets to understand appropriate marketing techniques and Australia's position in each market relative to



APAL's Market Development Manager Claire Fitchett (rt) with Australian pear growers promoting their fruit in Thailand.

competitors. Considerable market research and intelligence was gathered and was provided to industry in a detailed report. A key focus for the visit was a pilot trade of Australian Pink Lady apples in the Jason's and Cold Storage supermarket chain (19 stores total) in Kuala Lumpur. This was very successful, with the importer ordering a further three containers of Pink Lady apples from Lenswood Co-operative in addition to the initial container.

- Delivery of an outbound study tour to South East Asia in August and September 2014. Three Shepparton based apple and pear growers participated in the program which visited Malaysia, Thailand and Hong Kong for Asia Fruit Logistica. The program included meetings with importers and retailers in each market and store visits at all levels (low, medium and high end retail) and participation in the Asia Fruit Congress. Feedback from the participants suggest that Malaysia is a tough market and will be difficult for Australian growers to compete successfully in, Thailand presents very good opportunities for both pears and apples and Hong Kong offers some opportunities for industry but it is a market that all countries can supply into based on the fact that it is a non-protocol market.
- As part of the study tour program in Thailand 2014 the MDM delivered training sessions on Australian pears in three retail chains (Makro, Rimping and Foodland). The training sessions focussed on applying knowledge through educating retail buyers and store managers on pear handling, storage, presentation, health and nutrition, taste, varieties and seasonality. The training was very well received and each retailer asked us to run additional, more in-depth training next year to support a major push of Australian pears into Thailand. Realistically, we could double our pear exports to Thailand with a concerted effort on applying post-harvest and in-store handling knowledge on behalf of industry. This would be of enormous benefit to the industry overall, with less fruit on the domestic market.
- A visit to China and Vietnam took place in November 2014 to explore market opportunities and gain market insights. The China component involved participation in the China FVF trade show. It is strategically important for the apple and pear industry to participate in this event as part of a suite of activities designed to gain access for mainland apples into China. Visitors to the show included a mix of importers, wholesalers, retailers and research bodies. They were interested in learning about the varieties of apples that Australia grows and keen to try samples of Pink Lady, Tiger Fuji and Victorian pears. Food safety was and is a real concern for Chinese consumers and educating the market about Australia's regulation and compliance standards is paramount in securing the trust of Chinese buyers. The purpose of the Vietnamese trip was to meet with importers in this developing market. Unfortunately, market access to Vietnam was terminated as of 1 January 2015, however relationships were established which can be pursued once access is reinstated. In addition to understanding the retail market, time and effort was spent in-market understanding retail prices points, sales margins, the competitor landscape and alternative routes to market. These market insights provide exporters and potential exporters with invaluable information that can be used to formulate market entry and servicing positions; price, market channels, fruit specifications (size, colour, taste, packaging formats) promotional efforts etc. This information was then shared amongst Team Australia and Pear Steering Committee members.
- The MDM took part in the 2015 Now in Season CEO Program. This multi-sector, multi-region campaign is designed to promote and raise awareness of Australian fruit. This initiative, led by the Victorian Government, supports the notion that the sum is greater than the parts and at the retail level helps generate an on-going presence of Australian produce for their

customers, with clear and consistent messaging of Australia being a supplier of safe, premium quality and healthy fruit. Over time, strong in-market relationships have been formed with retailers, wholesalers, importers and delivery partners such as Austrade. As a collective, the ability to leverage these relationships has enabled the Now in Season program to come to life across the retail landscape in markets such as Thailand, Indonesia and the Philippines. This in turn has flowed back through the supply chain, creating supply opportunities for Australian fruit into these markets, with a particular focus on establishing and growing the pear category in Thailand and Indonesia. In 2015, Thailand was the third highest export market for Australian apples and Indonesia was ranked the second highest market for Australian pears.

Export Strategy Development

One key deliverable of the AP11016 project was the refinement of the Export Market Strategy, the development of export market plans and execution of pilot trades. The delivery of the export market strategy component of this activity has not been achieved to the standard required. Over the course of the project life, the scope, remit and delivery partners of this plan have changed considerably with the net result being the production of an incomplete and unsatisfactory strategy export plan. The MDM had assumed the responsibility to deliver this document and has re-drafted the strategy document with further work to be delivered to finalise the individual country business cases.

- The MDM revised the 2014 Export Marketing Plan prepared by HAI to take into account current market access priorities and requirements of the industry to run promotions/ pilot trades in specific export markets. The MDM provided input and further refinement to the Terms of Reference for the Export Strategic Plan, being led by HAI, due to go to tender in October 2012. Provision of the tender to market was held up by DAFF who was seeking compliance of Export Strategies with a DAFF formulated template.
- Management of the Export Strategic Plan process - initially this project was to be jointly managed by HIA and APAL and a Project Reference Group was established comprising both parties, and Office Horticulture Market Access (OHMA). The Project Reference Group reviewed initial submissions for the work. The Department of Agriculture then advised they would fund the work and therefore would contract directly with the service provider. The MDM was the lead contact at APAL throughout this process and participated in the first face-to-face meeting with the Department and the appointed consultant. Support was provided to ensure all industry members have the opportunity to input into the Plan.
- The draft plan was not of the standard expected or required, despite numerous meetings, emails and phone calls throughout, so the consultants were requested to provide a more detailed report, incorporating industry R&D needs and a more specific approach for developing target markets. The final report was due at the end of August 2014 but was delivered June 2015, unfinished. It was then decided to take the plan in-house and for APAL to complete the document, complete with market access and development priorities and robust business cases that will be used to help prosecute the case for market access for apples and pears into key export markets.

Resolution of Technical Market Access Issues

Technical market access issues were delivered throughout the life of the project on a as needs basis.

- Preparation of a submission to OHMA for market access to Taiwan. From January to March 2012 the MDM led the development of a submission to OHMA on behalf of APAL and the Australian Nashi Growers Association for pomefruits to be priority commodities for market access into Taiwan. This activity focused on gaining access to the Taiwan market for all Australian States.
- Arranging the visitation of DAFF accompanied Thailand quarantine officials to pack-houses and orchards across six states (and the development of a multi-industry project to fund the visit form levies in the apple and pear/persimmon and kiwifruit industries). This activity focused on maintaining access to the Thai market for all Australian States.
- Arranging the visitation of Chinese CIQA and AQSIQ officials to orchards in Batlow NSW. This activity focuses on developing relationships with Chinese officials for mainland China access for apples and pears.
- Working with DAFF to organise and co-host inbound delegations;
 - Provided on ground support for a group of eight Chinese officials (CIQA and AQSIQ) in March 2012 in Batlow; and
 - Accompanied DAFF and Thai officials to audit pome fruit production and packing in six states in April 2012.
- Submission to OHMA to seek improvement of the existing protocol to export apples to Canada.
- The provision of industry comment to DAFF on a range of market access issues including trial shipment of apples to India, new Taiwan protocol, apple and pear industry's priorities for China Fruit Fly meeting.
- Participation in DAFF 2013 Market Access Roundtable held in Melbourne.
- Liaison with DoAWR on Tasmanian apple exports to China. After many years of encouraging Tasmanian exporters to send fruit to China, a buyer was identified and the MDM took the buyer to Tasmania in early March to meet with suitable growers and subsequently as order was confirmed.
- Participated in the Fruit Growers Tasmania export registration day. New procedures were put in place for growers wanting to export to Thailand, as well as Tasmanian growers exporting to China, Taiwan and Japan. This required the coordination of national registration listings for export to Thailand for the 2015 and 2016 export seasons on behalf of industry. Registration forms were received, vetted and sent to the DoAWR for registration. 2014 was the first year the Department sought APAL to take responsibility for this extensive piece of work on behalf of industry.

- The MDM engaged with DoAWR to progress market improvement in the areas of on-shore cold treatment options for apples and pears to Thailand and the acceptance of mixed consignments.
- Funding applications were submitted to DoAWR for the Package Assisting Small Exporters (PASE) to secure funds for a) the development on an online export registration system for apples and pears and the development of a Standard Operation Procedures Document and a Treatment Hierarchy Document.
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Trade Fairs

- Attendance at the China World Fruit and Vegetable Trade Fair 2011 – 2015. Meetings with CIQA and AQSIQ representatives to represent the apple and pear industry. Meetings with DAFF and Austrade staff to better understand the market access process and where Australian horticulture is positioned internationally.



APAL CEO John Dollisson manning the stand at Asia Fruit Logistica to help promote Australian apples and pears.

- Management of the apple and pear industry's stand at Asia Fruit Logistica trade show 2012 – 2015 as part of Australia Fresh presence in Hong Kong. Participation in networking function, meetings with buyers, and interview with Chinese based news company.
- Attendance at 2012 Fruit Logistica in Berlin, meeting with International Pink Lady Association staff, UK based retailers and industry representatives. Participation in the Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE) and World Apple and Pear Association (WAPA) AGMs. These provided insight into international production and export of apples and pears and highlighted a shortage of product in the northern hemisphere this season.

Team Australia & Pear Steering Committee

“Team Australia” was formed with the charter of developing a collaborative approach and a willingness to re-engage in export. APAL coordinated and provided guidance to the Team Australia

group which comprised of key Australian exporters and growers who were recognised as demonstrating a dedicated commitment to supporting export and the group understood the importance of taking a strategic approach to export and dealing with export issues.

- January 2013 the formation of Team Australia who committed to quarterly meetings.
- In late 2013, the MDM, along with the APAL CEO, established the Pear Steering Committee. This group comprised of leading pear growers in the Goulburn Valley focussed on issues affecting the pear industry including; Williams' pear over supply and tree removal, competitiveness, SPC intake, a greater focus for export, the need for greater involvement of the pear industry in domestic marketing campaigns and quality issues. An ongoing objective of the Pear Steering Committee is to encourage greater collaboration within the industry to improve competitiveness and profitability.
- Ongoing liaison with retailers, importers and growers to coordinate and implement Team Australia and Pear Steering Committee export programs in South East Asia and the UK. The purpose of these groups is to link growers with similar needs and interests and help foster an export culture in the industry. Operating in isolation, many growers would not have the volume and variety mix suitable to supply large customers. Fostering collaboration addresses this issue by encouraging growers to supply fruit to each other to meet market demand as well as share learnings and experience. Regular correspondence with Asian retail buyers, Austrade and support organisations ensures export opportunities are maximised. The opportunities are communicated to industry via face-to-face meetings, workshops and email. The MDM worked with exporters to ensure that fruit met market specifications and technical requirements such as in-transit cold treatment and packing standards.

Industry Advisory Committee

Assuming the role of the Secretariat for the newly created Marketing Sub Committee of the IAC, merging the export and domestic committees; secretariat services, input, and minutes.

Export Directory

A dedicated Australian Apple and Pear Export Directory was produced by the MDM to provide international buyers, retailer, importers and supply chain partners with a comprehensive listing of Australian exporters, including; key contact information, business overviews and product availability. The document also served to act as a marketing tool highlighting Australia's growing regions, safety standards and the health and nutrition properties of Australian apples and pears.

The Export Directory is published on APAL's website: <http://apal.org.au/supply-chain/trade/australian-apple-pear-export-directory/>

Horticulture Export Industry Consultative Committee

APAL joined as a member of Horticulture Export Industry Consultative Committee (the Committee) in April 2013. The Committee is the principal forum for the DoAWR to consult with horticultural industries on export inspection and certification, and other relevant issues, meeting in Canberra quarterly.

The Committee is the primary consultative body to:

- discuss export inspection and certification issues affecting industry and solutions to address these issues;
- discuss the performance of departmental programs;
- communicate outcomes of the Committee's work to relevant export industries; and
- explore, identify and promote opportunities to improve the efficient and effective administration, provision and consumption of the department's cost recoverable regulatory activities and services.

Over the course of the project, the Committee considered:

- strategic directions for the department's Horticulture Exports Program ensuring Australia meets its obligations to the International Plant Protection Convention;
- significant proposed changes to policy and operational procedures;
- program budgets, cost recovery mechanisms, reviews and charging levels; and
- key program performance issues such as efficiency and effectiveness indicators.

Stimulate Domestic Demand

Two key deliverables listed under the domestic demand banner were reviewed in the early stages of the project and deemed to be no longer appropriate based upon external factors;

- The domestic marketing fact sheet was produced by HAL Marketing; and
- Visits to growing regions to assess the reception of the 'Aussie Apple' brand initiative during the Future Orchards program was replaced as the Aussie Apples brand was no longer seen to be contentious. Roles of HAL Marketing and APAL Market Development Manager were clarified so that the APAL MDM is the focal point for engagement with the grower community and supply chain stakeholders.

Supporting HAI with the 'Aussie Apples' and 'Rediscover the Pear' Campaigns

On-ground APAL support was provided to HIA to staff the apple and pear stand at the Royal Melbourne Show from 2012 - 2015, promoting Aussie Apples and enabling growers the opportunity to meet with the public and inform visitors about the growing practices and the different varieties available. Additional support was offered to HIA in the form of organising a number of grower visits to enable the HIA marketing manager the opportunity to explain the apple and pear industry marketing activities.

HIA's Luke Westley presented at the State Meeting in March 2015.

Stakeholder Engagement – Producers and Retailers

Throughout the life of the project APAL had maintained an ongoing meeting regime with the main Australian retailers; Coles, Woolworths, Aldi and IGA. Given that over 98% of Australia's apple production is sold domestically and that the main retailers account for over 70% of apple sales, maintaining a collaborative and constructive working relationship with the retailers is essential for the apple and pear sector.

In addition to one-on-one meetings, APAL took part in a number of facilitated retailer and industry sessions and workshops. The purpose of the workshops was to forge closer links between the apple and pear industry and the retailers and provide a forum for open discussion and enable APAL to better understand industry needs, problems and opportunities. This in turn helps to determine industry priorities and identifies areas for further co-operation between growers and end market users. The meetings were productive and commitments were made to work together on key issues, namely quality guidelines, traceability and variety mix.

Meetings with SPC Ardmona took place throughout the duration of the project. The canning industry has changed considerably over the last decade and this has had a significant impact of pear growers, specifically those with volume of William Bartlett pears, as the markets for their product contracts. APAL, SPC Ardmona and the Victorian State Government have worked together to help the industry through this transitional period, looking at both alternative crop options and alternative market channels, namely exports. The outcomes of the meetings are shared with industry via the Pear Steering Committee and Team Australia.

Industry Resources and Capability Building

InfoPome

The MDM assumed the management of AP11033, the InfoPome project, which collects, analyses and disseminates cool store stock reports. This industry resource provides industry intelligence and market data for the use and adoption of growers to make informed decisions relating to stock holdings and stock movement.

- Ongoing delivery of the InfoPome system (AP11033), including a major upgrade of the system to include 48 new coolstores in February 2013.
- System overview and role clarification with Graeme Forsythe completed Aug 12 with an agreement from APAL Board to move to a monthly reporting cycle. Overhaul of Infopome for start of season, Feb 2013 - increased participant numbers, uploading all new participants into the database, communications with new participants, troubleshooting.
- Ongoing management of the Infopome system (AP11033) to its completion in December 2014. At the behest of the Key Stakeholders, the APAL Board agreed to fund the continuation of the Infopome project. Key changes to the existing model will be implemented to better reflect and respond to industry needs. Three meetings have been held with the software developer to progress the project. Key changes include the move to weekly reporting, which will ensure better quality and more useful data for industry. The new process will involve a voluntary opt-in for packing sheds, with only those who opt-in to receive the reports. With fewer, but more reliable participants, updated and tailored software designed for PC, i-pad and mobile devices, the program should require minimal APAL intervention. The transition from monthly to weekly reporting is expected to be completed by June 2016.
- In 2015, distribution of InfoPome via MailChimp shows that InfoPome was opened by 51.6 per cent of recipients, and 27.4 per cent of them clicked through for full reports. InfoPome was distributed to 152 people in February 2014, rising to 238 in December 2015.

Extension Activities

- The Fresh Pear Update day was run in the Goulburn Valley in December 2014. Topics included domestic marketing initiatives, export opportunities, situation analysis etc. Approximately 25 growers attended.
- Attended Victorian Farmer's Federation conference in Melbourne 12-13 June 2014.
- The MDM participated in the APAL Emerging Leaders Course at Marcus Oldham College, 6-11 July 2014. This was an excellent, high quality program with a broad range of participants from across the supply chain. Public speaking skills were a key focus for this course and the MDM was able to practise new skills, but more importantly build networks with other emerging leaders in the industry.

Outcomes

The outcome of this project is an improvement in the competitiveness and sustainability of the Australian apple and pear industry. This project has contributed to improvements in capacity and capability of Australian growers, packers and supply chain contributors to:

- Deliver consistently high quality fruit to the market;
- Distinguish Australian product from imported product ; and
- Participate in the growth of Australian apple and pears being exported.

Produce High Quality Apples (and pears) at Internationally Competitive Prices

Publication of Quality Guidelines document on the APAL website ensured it was made available to all growers and circulated to retailers on request. This document serves as a tool for growers, packshed operators and employees as a benchmark for quality standards. The document was designed to complement existing retailer specific guidelines, not as a replacement piece. Growers are reporting an acceptance of the guidelines.

Expand Exports

Over the lifetime of the project, export sales have increased significantly. Of course there are other significant factors that have greatly influenced that outcome, namely, a more favourable exchange rate and global trading nuances allowing for Australian exporters to identify supply windows into new and existing markets. However, the importance of the activities and outputs delivered under this project should not be underestimated.

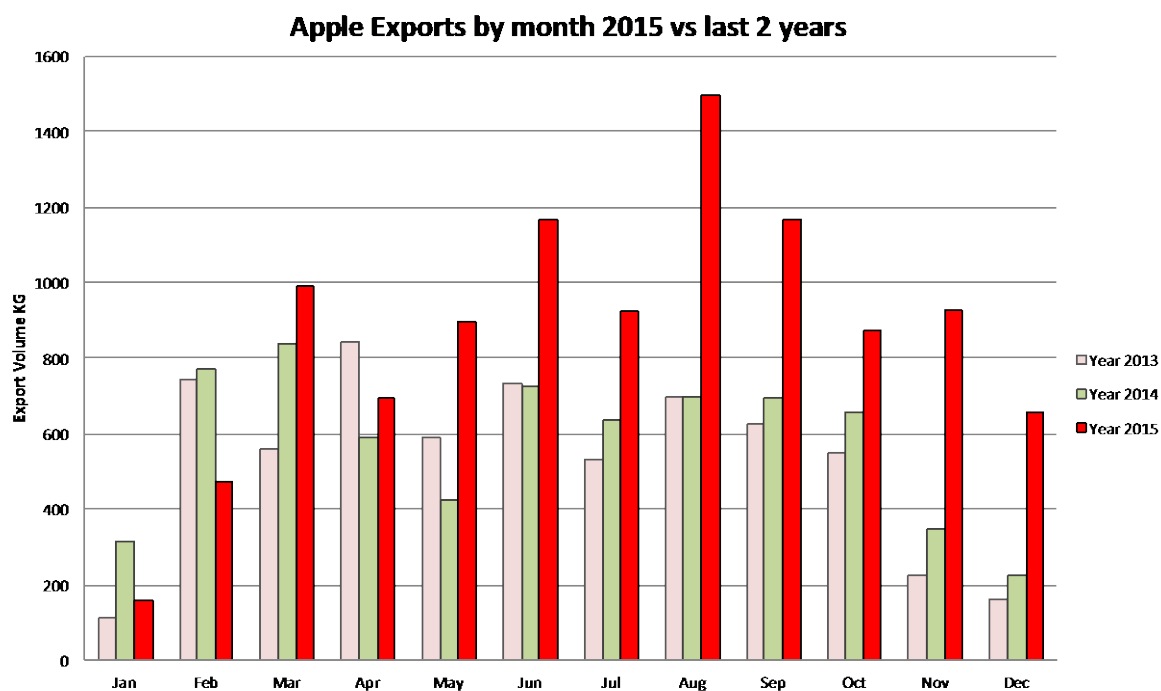
Building grower/exporter capability and willingness to export has been at the heart of delivering AP110016. This has been achieved by providing growers and exporters with a greater understanding and insight into market opportunities, establishing and developing relationships between key exporters, retail buyers and importers, securing market insights and sharing those findings with the

broader growing community, understanding the trading environment, pricing, quality issues, consumer preferences and supply chain machinations.

Outputs delivered under this project such as in-bound and out-bound trade missions and study tours, establishing a coordinated and aligned export groups such as Team Australia and the Pear Steering Committee and representation at key trade fairs have all played a role in helping to re-establish Australia as an exporter of apples and pears. As it currently stands, apple exports account for just 2% of Australia's fresh crop and pears 18.5% but this is a significant improvement and we have seen and continue to see more growers look to export as a valuable and viable alternative route to market.

2015 export data indicates apple exports for 2015 are 115.8% up on the previous year by volume and up 151.9% by value and pear exports for 2015 are 50.6% up on the previous year by volume and up 46% by value.

APPLE exports by month 2015



Source : ABS data, Fresh Intelligence analysis

APPLE exports by volume and value by market

Key Results - January to December

100.0% share of season

Apples
Exports by Market

Volume	3,847 tonnes	...+ 115.8%
Value	10.75 million	...+ 151.9%
\$ per kg	\$2.79	...+ 16.7% 0.40 c

Country	Volume Tonnes (season to date)			Annual Total		Value \$ Million AUD (season to date)			Annual Total		Average price per KG		
	Jan to Dec-14	Jan to Dec-15	Change to LY	Jan-15 Dec-15	Share %	Jan to Dec-14	Jan to Dec-15	Change to LY	Jan-15 Dec-15	Share %	Jan to Dec-14	Jan to Dec-15	Jan-15 Dec-15
TOTAL APPLES	1,782	3,847	116%	3,847	100%	4.27	10.75	152%	10.75	100%	2.39	2.79	2.79
United Kingdom	234	699	199%	699	18%	0.81	2.46	202%	2.46	23%	3.49	3.52	3.52
Papua New Guinea	962	1,061	10%	1,061	28%	2.03	2.17	7%	2.17	20%	2.11	2.05	2.05
Thailand	90	572	535%	572	15%	0.22	1.36	527%	1.36	13%	2.41	2.37	2.37
Indonesia	0	230		230	6%	-	0.94		0.94	9%		4.09	4.09
United Arab Emirates	3	211	7398%	211	5%	0.01	0.82	8797%	0.82	8%	3.26	3.86	3.86
Taiwan	0	20		20	1%	-	0.65		0.65	6%		32.23	32.23
Hong Kong	37	196	425%	196	5%	0.12	0.63	430%	0.63	6%	3.17	3.20	3.20
China	24	168	601%	168	4%	0.07	0.51	624%	0.51	5%	2.95	3.05	3.05
Singapore	101	262	159%	262	7%	0.25	0.47	88%	0.47	4%	2.47	1.79	1.79
Malaysia	93	234	152%	234	6%	0.24	0.40	65%	0.40	4%	2.61	1.71	1.71
Nauru	99	35	-65%	35	1%	0.24	0.10	-56%	0.10	1%	2.38	2.97	2.97
Kuwait	0	42		42	1%	-	0.05		0.05	0%		1.10	1.10
New Caledonia	55	28		28	1%	0.11	0.04	-63%	0.04	0%	1.95	1.44	1.44
all other	85	89	5%	89	2%	0.17	0.15	-14%	0.15	1%	2.00	1.65	1.65
TOTAL Apples	1,782	3,847	115.8%	3,847	100%	4.27	10.75	152%	10.75	100%	2.39	2.79	2.79

source : ABS data, Fresh Intelligence analysis

This data is funded from project MT14006

Pear exports by month 2015



Pear exports by volume and value by market

Key Results - January to December

100.0% share of season

Pears
Exports by Market

Volume	10,432 tonnes	...+ 50.6%
Value	16.76 million	...+ 46.0%
\$ per kg	\$1.61	... -3.0% (0.05) c

Market	Volume Tonnes (season to date)			Annual Total		Value \$ Million AUD (season to date)			Annual Total		Average price per KG		
	Jan to Dec-14	Jan to Dec-15	Change to LY	Jan-15 Dec-15	Share %	Jan to Dec-14	Jan to Dec-15	Change to LY	Jan-15 Dec-15	Share %	Jan to Dec-14	Jan to Dec-15	Jan-15 Dec-15
TOTAL PEARS	6,929	10,432	51%	10,432	100%	11.48	16.76	46%	16.76	100%	1.66	1.61	1.61
Indonesia	1,670	2,485	49%	2,485	24%	3.00	4.39	46%	4.39	26%	1.80	1.77	1.77
New Zealand	1,998	2,885	44%	2,885	28%	3.00	4.00	34%	4.00	24%	1.50	1.39	1.39
Canada	1,333	1,306	-2%	1,306	13%	1.95	2.03	4%	2.03	12%	1.46	1.55	1.55
Hong Kong	59	1,133	1806%	1,133	11%	0.12	1.88	1526%	1.88	11%	1.95	1.66	1.66
Singapore	208	859	312%	859	8%	0.50	1.68	236%	1.68	10%	2.40	1.96	1.96
New Caledonia	602	683	14%	683	7%	0.84	0.92	9%	0.92	5%	1.39	1.34	1.34
Papua New Guinea	314	411	31%	411	4%	0.55	0.73	33%	0.73	4%	1.75	1.77	1.77
Fiji	248	204	-18%	204	2%	0.29	0.24	-15%	0.24	1%	1.15	1.19	1.19
Malaysia	131	89	-32%	89	1%	0.26	0.21	-21%	0.21	1%	1.99	2.32	2.32
United Arab Emirates	1	45	7854%	45	0%	0.00	0.13	7312%	0.13	1%	3.19	2.98	2.98
Vanuatu	24	55	132%	55	1%	0.05	0.10	105%	0.10	1%	2.10	1.86	1.86
Philippines	4	48		48	0%	0.04	0.09		0.09	1%		1.91	1.91
Thailand	54	54	0%	54	1%	0.08	0.09	7%	0.09	1%	1.53	1.63	1.63
French Polynesia	50	56	13%	56	1%	0.08	0.07	-7%	0.07	0%	1.52	1.25	1.25
all other	233	117	-50%	117	1%	0.73	0.19	-74%	0.19	1%	3.14	1.63	1.63
TOTAL Pears	6,929	10,432	50.6%	10,432	100%	11.48	16.76	46%	16.76	100%	1.66	1.61	1.61

source : ABS data, Fresh Intelligence analysis

This data is funded from project MT14006

Stimulate Domestic Demand

Throughout the life of the project, on-going dialogue and meetings with the key retailers and industry stakeholders has helped to provide a clearer understanding of the issues industry needs to address. This information has been communicated throughout the supply chain through the collaborative industry groups, Team Australia and the Pear Steering Committee as well as via a range of in-house APAL communication channels; Industry Juice, the Australian Fruit Grower, Key Stakeholder sessions and APAL conferences.

Particular areas of concern addressed include quality issues and the role of staff training. Whilst work has been achieved to date, namely the development of the quality guidelines document, further work is required, specifically targeting the supply chain beyond the packhouse, to ensure the customer experience is a good one, every time they purchase and apples and pears.

A significant component of AP11016 in the early stages related to how to combat the effect of imported product from New Zealand and China entering the domestic market. The way forward was through the development of the Aussie Apples brand and a supporting campaign promoting provenance.

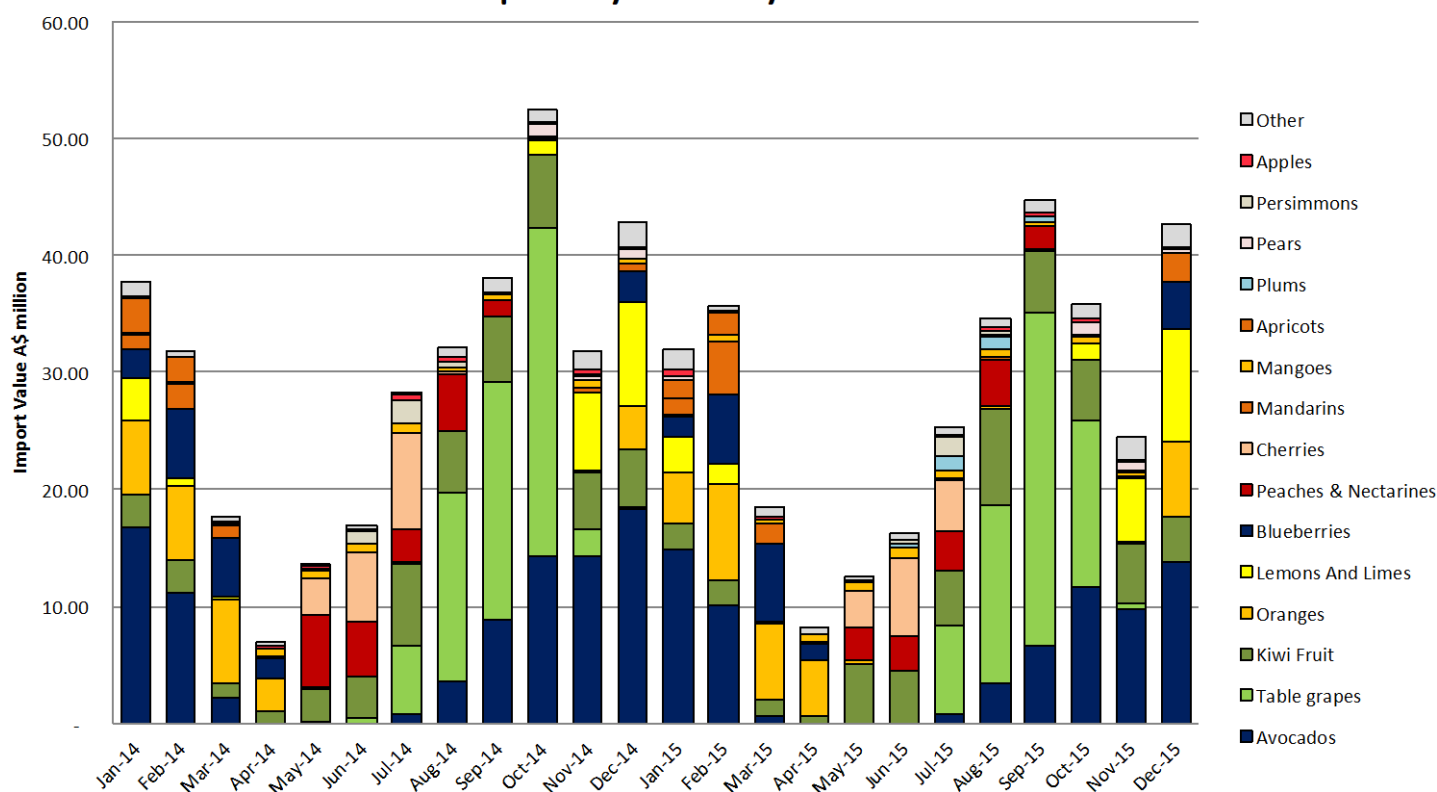
This threat did not materialise and even to date the imports of apples from these markets are relatively insignificant and there was a universal acceptance of the Aussie Apples branding position by growers, retailers and consumers alike with the role of provenance featuring as a key purchasing driver, particularly in the fresh food sector.

However, the industry cannot afford to be complacent about this issue. Promoting provenance and the integrity of Australian growers and Australian fruit is an ongoing task, be it through advertising, PR, editorial and all external and internal communications. Creating a connection and an understanding of the growers themselves, their orchards and facilities and the fruit will help to drive consumer awareness about the importance of seeking out Australian fruit, not only for quality and health reasons but also to demonstrate support for the Australian horticulture industry. This requires a coordinated approach, linking messaging and actions between industry, supply chain partners, the retail sector and end consumers.

AUSTRALIAN IMPORTS - Fresh Fruit Imports to Australia by month

Apples and Pears are a small segment of Australia's fresh fruit imports. Apples from China are strongest in January whilst Pears from China appear from September to April. Overall pear imports worth \$2.7 m account for less than 1 per cent of Australia's \$332 million worth of imported fresh fruit.

Australian Fruit Imports by month by value Jan 2014 - Dec 2015



Industry Resources and Capability Building

The on-going management of the InfoPome system was the key deliverable under the industry resource and capability building banner. Supply volume has a major impact on fruit price. Capture of accurate data on whole-of-industry supply volumes is complex and in general is beyond the scope of individual businesses. Lack of data or poor quality data leads to poor quality decisions, which can adversely impact on grower profitability.

APAL makes high quality estimates of the annual crop at harvest after which the industry then relies on a credible flow of stock level change data as the cool store stocks are converted to commercial sales through the remainder of the year. For many years the measure of the draw down of cool store stocks has been used as a reliable indicator of the rate of sales and the measure is used in the apple industry globally.

The InfoPome data collection tool has continued to evolve through the life of this project, transitioning from fortnightly, to monthly to weekly collection timeframes. The objective being to build on previous work to more efficiently manage the capture of coolstore stock data and report on a weekly basis, by variety and state to allow informed decisions about sale prices and volumes to be sold with on-hand just-in-time data available. It will be a key tool for the industry's sales and marketing staff.

The submission of data is made voluntarily by growers and coolstore operators. Timely collection of this data has been an ongoing frustration with this project and considerable APAL resources have been allocated to capturing the information from the coolstores to ensure a critical mass of data is collected so that the data is credible.

The key stakeholders convened in 2013 and committed to the on-going use of the InfoPome system and supported the move to a weekly collection system. As a direct result of this agreement, weekly coolstore data will be made available only to those coolstores who have contributed the data.

Mid Term Review of Project

Russell Sully and Frank Greenhalgh were appointed to undertake the mid-term review of this project (AP11016), August 2013. The mid-term review was a requirement of HIA, who helped identify the terms of reference.

The mid-term review sought to assess the following:

1. Assess progress against the two key project activity areas and their sub-activities:

a. Domestic market development

- Developing strategies for improving the consistency and quality of fruit delivered to market
- Developing strategies for deploying the Aussie Apples brand
- Develop a knowledge base and assist the industry to improve its capacity to access and disseminate data and intelligence on market parameters

b. Export market development

- Refine the annual Export Marketing Plans
- Determine issues and road blockers that inhibit a strong export culture
- Define and understand overseas markets that offer profitable export opportunities
- Develop collaborative approaches to enter and expand selected export markets
- Facilitate pilot trades
- Prepare submissions for HAL and government funding initiatives to support the export development program
- Monitor export market competitor activities
- Resolve technical market access matters
- Communication

2. Review activities to-date and benefits to the apple and pear industry.

3. Assess prioritisation of activities and comment on the focus and appropriateness of activities for supporting apple and pear capacity building to ensure they continue to be effective.

4. Comment on the level of engagement of the apple and pear fruit industry with the projects and how engagement could be enhanced.

5. Comment on project management structure and resources for supporting performance and any changes that may be required to support improved performance.

6. Undertake a Strategic SWOT analysis (to be completed with the input of APAL and HAL) on each of the projects.

7. Recommendations for the remainder of the projects, which may also be utilised in the development of future apple and pear industry capacity building projects

The main recommendations arising from the mid-term review of the project, addressing operational, strategic and project improvement areas were as follows;

- It was recommended that the MDM and the project team have some training in the use of tools to facilitate improved planning, monitoring and evaluation of the project;
- Removing the management of InfoPome from the duties of the MDM will free up time for other work. For example, further developing an export culture amongst growers/packers and collecting market intelligence and documenting export market requirements (including access issues);
- A clearer distinction needs to be made between the activities/ achievements and attribution to this particular project, versus similar and complimentary HAL funded projects (i.e., AP11023); and
- Other recommendations addressed strategic issues related to improved integration of projects contributing to the same or similar outcomes, including consideration of 'programs' of work, and to overcome potential problems associated with the MDM, and more generally IDOs, managing other HAL funded projects.

These were addressed by the following activities:

- Undertaking training to ensure the project has clearly defined outputs which are S (specific), M (measurable), A (achievable), R (realistic) and T (time bound). APAL has sought advice from HIA regarding a training program to better meet these needs;
- Clearly highlighting in Milestone reports which activities specifically can be attributed to the MDM, as opposed to those which may be covered by other projects (AP11023). A greater level of detail will be provided around activities and outcomes in the milestone reports. APAL will also remind other project managers not to report on activities that should be attributed to this project, to provide clarity and avoid confusion; and
- APAL sought to improve integration of projects as part of an apple and pear capacity building project which will be sought for the period post 1 September 2015.

Evaluation and Discussion

The delivery, reporting and potentially the outputs and outcomes of AP11016 would have benefited from having a more detailed and comprehensive project proposal at the outset. Very early on in the first stages of delivery, the project plan, scope and deliverables changed significantly. Whilst the macro objectives and aspirations were clearly articulated, the actual details concerning how those objectives would be delivered was light on.

From a continuity perspective, the project changed hands three times, with three different Market Development Managers taking carriage of the project. This has impacted the project in terms of the ability to accurately capture the outputs and more particularly being able to measure the outcomes of the project and provide informed assessments of the outcomes. The current MDM has had to rely heavily on the milestone reporting to capture the outputs and the detail attached to each of the milestones has been inconsistent throughout the life of the project.

Personnel issues at HIA, namely the role of the HIA marketing manager, have also impacted on the ability of the MDM to deliver the objectives as stipulated in the project proposal, particularly relating to the delivery of outputs stipulated against domestic market activities.

As started throughout the mid-term review, the outcomes could have been captured in more detail by using targeted and specific metrics aligned to each of the outputs and these would have needed to be captured right throughout the life of the project as opposed to just being assessed at the project's completion.

In spite of the administrative and personnel problems associated with AP11016, it was acknowledged that the delivery of this project was timely due to the fact that the apple and pear industry recognised the need for further development of the domestic and export markets in the face of increasing international competition, and this project has an important role to play in improving the marketing performance of the industry.

As the project developed, a far greater emphasis was placed on the delivery of export related activities. These efforts to help improve the capability, capacity and willingness of the industry to transition into export mode also have had a beneficial knock on effect on the domestic market, by removing stock that could otherwise create a potential over-supply issue and negatively impact price and subsequently grower return.

The industry continues to transition into being more export focussed and the work delivered to re-establish this willingness and skill set has certainly laid the foundation for the industry to continue with success in this direction.

Recommendations

APAL recommends the following areas of work to be continued with;

- The development of a retailer training manual to extend the work set in train by the development of the Quality Guidelines, to drive quality improvements along the supply chain;
- The final delivery of the export market strategy with clearly articulated evidence based business cases;
- The development of country profile documents that present clear opportunities for exporters and potential exporters in terms of product types, descriptions, supply windows and competitor analysis; and
- Working closely with HIA of the development of domestic and export marketing messages and initiatives to ensure the messaging and actions reflects the needs of industry.

Acknowledgements

APAL would like to thank apple and pear growers for their ongoing support, HIA for funding for this project, and to all our other valued partners across the industry.

Intellectual Property, Commercialisation and Confidentiality

No IP, commercialisation or confidentiality issues or development to report.

Issues and Risks

None to report.

Communications

The following list includes a mix of on-line articles – Industry Juice and print articles that appeared in APAL’s monthly Australian Fruit Growers publication.

- Gulfood, an opportunity for Australian pome in the UAE? (<http://apal.org.au/gulfood-opportunity-pome-uae/#sthash.wgU745KT.dpuf>), 22 Mar 2016
- Thai importers visit Victorian growers (<http://apal.org.au/thai-importers-visit-victorian-growers/#sthash.SVuAg16h.dpuf>), 2 Mar 2016
- Apple exports up 111 per cent in 2015 – to date (<http://apal.org.au/apple-exports-111-per-cent-2015/#sthash.2atCHfdJ.dpuf>), 13 Jan 2016
- Promoting Australian pome fruit in China (<http://apal.org.au/promoting-australian-pome-fruit-china/#sthash.Dr2Pyk3S.dpuf>), 26 Sep 2015
- ‘Now in Season’ Asian promotion wins (<http://apal.org.au/now-season-asian-promotion-wins/>), 1 Sep 2015
- Apply now for on-shore cold treatment listing (<http://apal.org.au/apply-now-for-on-shore-cold-treatment-listing/#sthash.2fuHPUNG.dpuf>), 29 Jul 2015
- New export development collateral (<http://apal.org.au/new-export-development-collateral/#sthash.z4XniicG.dpuf>), 28 Jul 2015
- Fresh pear research (<http://apal.org.au/rejuvenating-pear-research/>), 22 Jul 2015
- ‘Now In Season’ – Thailand, Indonesia and the Philippines (<http://apal.org.au/now-in-season-thailand-indonesia-philippines/#sthash.89v58PTa.dpuf>), 24 May 2015
- Agricultural trade counsellors meet with growers (<http://apal.org.au/agricultural-trade-counsellors-meet-growers/#sthash.5kHSXptW.dpuf>), 11 Nov 2015
- Meeting fruit buyers in China and Vietnam (<http://apal.org.au/meeting-fruit-buyers-china-vietnam/#sthash.62QAdqkH.dpuf>), 27 Feb 2015
- Pre-PEAR to deliver export quality fruit (<http://apal.org.au/pre-pear-deliver-export-quality-fruit/#sthash.IRxUpzA8.dpuf>), 16 Dec 2014
- Thai fresh produce buyers visit Victoria (<http://apal.org.au/thai-fresh-produce-buyers-visit-victoria/#sthash.6RgzD5BY.dpuf>), 26 Nov 2014

- Updated: crop protection guides for export (<http://apal.org.au/updated-crop-protection-guides-for-export/#sthash.GCdYIOEl.dpuf>), 22 Oct 2014
- 2015 export marketing funds available (<http://apal.org.au/2015-export-marketing-funds-available/>), 20 Oct 2014
- Rebates available for pome fruit exporters (<http://apal.org.au/doa-announce-15m-export-assistance-package/#sthash.bYsswxto.dpuf>), 14 Oct 2014
- Australian pears retail training in Thailand drives sales (<http://apal.org.au/australian-pears-retail-training-thailand-drives-sales/#sthash.Jmuzxa2U.dpuf>), 16 Sep 2014
- Tassie growers exposed to wider market in Hong Kong (<http://apal.org.au/tassie-growers-exposed-wider-market-hong-kong/#sthash.jTJU3lyx.dpuf>), 2 Sep 2014
- Apply now to export pome fruit in 2015 to Thailand, China, Taiwan & Japan (<http://apal.org.au/2015-export-listing-applications-thailand-china-taiwan-japan-now-open/#sthash.yHW6Rhwc.dpuf>), 22 Aug 2014
- Test for residues before exporting fruit (<http://apal.org.au/test-residues-exporting-fruit/#sthash.Pztm5tOO.dpuf>), 20 Aug 2014
- Focus on high quality fruit in wake of Russian ban (<http://apal.org.au/focus-high-quality-fruit-wake-russian-ban/#sthash.NXMuwg6q.dpuf>), 15 Aug 2014
- Annual VFF conference – export info (<http://apal.org.au/annual-vff-conference/>), 24 Jun 2014
- Asian Pink Lady™ buyers visit Australia (<http://apal.org.au/asian-pink-lady-buyers-visit-australia/#sthash.IDITzHPx.dpuf>), 20 Jun 2014
- Growers invited to Hong Kong for fruit show (<http://apal.org.au/growers-invited-hong-kong-fruit-show/#sthash.uguc09d6.dpuf>), 11 Jun 2014
- Pear export opportunities in key Asian markets (<http://apal.org.au/pear-export-opportunities-key-asian-markets/#sthash.Hi5sBBbM.dpuf>), 20 May 2014
- Wanted: input on horticultural export strategies (<http://apal.org.au/wanted-input-horticultural-export-strategies/#sthash.iAP03q1W.dpuf>), 2 Apr 2014
- Asian fruit importers visit Tasmania (<http://apal.org.au/asian-fruit-importers-visit-tasmania/#sthash.Vuy6iqGC.dpuf>), 10 Mar 2014
- Apple and pear 2013 trade review, 2014 plans (<http://apal.org.au/apple-and-pear-2013-trade-review-2014-plans/#sthash.gY3mr9H1.dpuf>), 18 Feb 2014
- Don't pick your apples too soon! (<http://apal.org.au/dont-pick-your-apples-too-soon/#sthash.dPxAkToZ.dpuf>), 18 Feb 2014
- Pear growers invited on Asia export study tour (<http://apal.org.au/pear-growers-invited-on-export-study-tour/#sthash.u4DZ7YkO.dpuf>), 3 Feb 2014
- Growers reminded about chemical residue limits for export pome fruit (<http://apal.org.au/growers-reminded-about-chemical-residue-limits-for-export-pome-fruit/#sthash.txloPFXZ.dpuf>), 20 Jan 2014
- Australian Pears – ripe for the picking (<http://apal.org.au/australian-pears-ripe-for-the-picking/#sthash.3aqWAt1T.dpuf>), 11 Dec 2013

External Media

Publication	URL
Weekly Times	http://www.weeklytimesnow.com.au/commodities/horticulture/hard-sell-pays-off-as-asian-fruit-buyers-flock-to-victoria/story-fnker6g8-1226907453123
Fresh Plaza	http://www.freshplaza.com/article/123392/Taz-tigers-to-land-in-Shanghai-this-week
Media Release - Ag Minister (VIC)	http://www.peterwalsh.org.au/blog/Media_Releases/post/thai-fruit-industry-marketers-visit-swan-hill/
Grower News (NZ)	http://www.growernews.co.nz/news_article.htm?cat=1&news_id=1485
Fresh Plaza	http://www.freshplaza.com/article/137886/Tas-fruit-growers-scope-China-potential
Fresh Plaza	http://www.freshplaza.com/article/138150/Now-In-Season-tour-heads-for-Manila
Premier of Victoria (media release)	http://www.premier.vic.gov.au/victorian-fruit-now-in-season-in-south-east-asian-retail-outlets
FruitNet	http://www.fruitnet.com/asiafruit/article/165083/tasmanian-apples-prove-precious-in-china
Fresh Fruit Portal	http://www.freshfruitportal.com/news/2016/01/14/aussie-pome-fruit-exports-pick-up-in-2015/
Fresh Plaza	http://www.freshplaza.com/article/156948/AU-fruit-exporters-aiming-for-the-Philippines
Custom Today (Pakistan)	http://www.customstoday.com.pk/australia-eyes-33-hike-in-horticulture-exports-to-phl/
Inquirer (Philippines)	http://business.inquirer.net/209723/australian-fruit-exporters-pitch-products-local-mart
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