

Horticulture Innovation Australia

Final Report

International Dried Grape Conference Participation & FoodNews

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Dried Fruits Australia Inc

Project Number: DG15700

DG15700

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ISBN 0 7341 3733 8

Published and distributed by:
Horticulture Innovation Australia Limited
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Sydney NSW 2000
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Summary

During the two year project period (2014/15 and 2015/16) the funding provided by this project enabled Dried Fruits Australia (DFA) to participate actively at the International Dried Grape Conferences held in Argentina (San Juan, October 2014) and Germany (Hamburg, October 2105) and provided DFA and major industry processors (Sunbeam Foods & Australian Premium Dried Fruits) with access to the latest global production and marketing information relating to dried grapes through the annual subscription (2014/15 & 2015/16) to the publication, Foodnews.

Some Background:

Dried Fruits Australia has reaffirmed strong support for a strategic production target for Australia of 25-30,000 tonnes, an increase of 8-12,000 tonnes above current production levels. This target has been publicly supported by both major processors, Sunbeam Foods and Australian Premium Dried Fruits (APDF).

In the past, Horticulture Australia Ltd was responsible for the collection of production and marketing information for the dried grape industry. HAL was able to use the export efficiency power provisions for dried grapes to require marketers to provide relevant data. However, these powers are no longer available to the dried grape industry, following the last review.

Also in the past, an industry crop forecasting program was undertaken with support from 21 growers, CSIRO and processors. The CSIRO used to maintain a sultana fruitfulness model that provided the earliest forecast crop 14 months prior to harvest. Again, this program no longer exists.

The International Dried Grape Conference

For many years, updated market information has been sourced from direct participation at the annual International Dried Grape Conference, regularly held in Europe, with alternate conferences being held in a producing country. Participation facilitates networking and access to industry contacts in major producing countries for the Australian industry.

The International Dried Grape Conference provides a vital source of information on production and marketing statistics in major producing countries, as well as important presentations on health and nutrition research being undertaken around the world, various promotion programs, industry trends, food safety issues and similar topics. In addition, field trips and visits to overseas processing facilities provide valuable insights to developments overseas.

Importantly, detailed reports on the Conference are provided to growers, the DFA Board and processor members at various forums, branch meetings and through articles in The Vine and member e-news.

FoodNews

This publication is a well-known and respected on-line source of market related information & analysis.

Foodnews is a vital tool for gather global market information for the Australian Dried Fruits industry. The publication includes articles directly reporting on issues affecting the supply and demand of dried fruit in many dried grape producing countries such as Turkey, USA, South Africa, Chile, Iran and China. The Australian industry competes with these producers in both the international and domestic markets making this information vital for strategic planning.

Foodnews reports on the weather events, currency movements, political issues and other matters that impacts the global dried fruits industry with specialist dried fruit industry reporters.

For several years, DFA & the major processors have agreed that a Foodnews subscription would be taken out by DFA with each industry stakeholder provided with relevant details of user name and password to enable ongoing access to the latest market information made available by FoodNews.

The DFA Board continues to strongly encourage investment in the Australian dried grape industry by urging growers to consider expanding their property sizes and plantings of new, improved dried grape varieties. Given this approach, it is vital that the industry has access to independent sources of global marketing and production information.

Outcomes

The broad goals of this project were to provide members of the Australian dried grape industry members with the opportunity to attend the International Dried Grape Conference and learn from their international counterparts about leading edge dried technologies and best practice management and handling systems that can be adopted in Australia, as well as gathering information about the international market for dried fruit. In addition, the Conference provided an important opportunity to further develop networks of contacts with growers, processors and researchers.

An outline of the expected outcomes or objectives and how these were achieved is detailed below:

- Access to the latest dried grape industry production & marketing information – the 2014 & 2015 Conferences provided delegates with up-to-date information on both a global and specific country basis. Presentations from producing countries (included USA, Turkey, Argentina, Australia, South Africa, Iran, Chile, China) as well as guest speakers, provided information on production & marketing trends, marketing issues, health and nutrition research, market supply/demand situation & market outlook etc. Similarly, the publication, Foodnews provided the industry with a vital source of market related information.
- Informed about global production – again, participation of the 2014 & 2015 Conferences has ensured that all industry stakeholders, including growers, are better informed about global production trends and thus are better positioned to make informed investment decisions. Similarly, information from Foodnews articles has been important.
- Technology transfer and communications strategies – relevant information made available in producing country reports at the 2014 & 2015 Conferences has been noted & used in strategies aimed at improving communication and increasing adoption of research results, best practice management & new technologies by Australian growers.
- Enhanced international networks – participation at the 2014 & 2015 Conferences has enabled the Australian industry to establish new networks and enhance existing networks as a result of regular contact with growers, processors & researchers from other countries. Further, the importance of this Conference is reflected in the recent invitation from China to hold the 2016 Conference in that country.

Dried Fruits Australia expects that some of the benefits that are flowing to the local industry include: quicker uptake of new practices & new technologies, improved efficiency in management of vineyards, better decision making, improved quality and productivity.

Information gathered from the International Dried Grape Conferences (2014 & 2015) has been communicated to growers, processors, DFA Board members and others via the quarterly publication, "The Vine", as well as press articles, member e-news and reports delivered at various forums. Copies of relevant papers (eg Conference guest speakers), presentations from producing countries and relevant Foodnews articles have been circulated widely.

Discussion

This project (International Dried Grape Conference Participation & Foodnews) has continued to provide real benefits to the Australian dried grape industry.

Up to date information about global production trends and the market situation and outlook has ensured that Australian growers and processors are better informed and positioned to make better investment decisions.

The information gathered from the International Dried Grape Conferences (2014 & 2015), including papers, reports, presentations and statistical summaries, as well as various editions of Foodnews has been made available to all stakeholders in one form or another.

The networks established or maintained as a result of participation at these Conferences are extremely valuable in providing access to current production and marketing information.

Implications for Australian Horticulture

This project provides the Australian industry with access to the latest information about production and marketing trends and related matters.

This information, gathered from Conference participation and Foodnews articles, indicates that global supply and demand is relatively stable.

Although Californian raisin acreages are dropping by about 5,000 acres per annum, plantings in other producing countries are rising.

A post-Conference evaluation confirmed that Australian growers must continue to focus on increasing their productivity in order to remain profitable. Australia is a relatively high cost producer, with high input costs, including labour.

How the information will be disseminated

As previously outlined, information from the International Dried Grape Conferences (2014 & 2015) has been communicated to growers, processors, DFA Board members and others via the quarterly publication, "The Vine", as well as press articles, member e-news and reports delivered at various forums.

Copies of relevant papers (eg Conference guest speakers), presentations from producing countries and relevant Foodnews articles have been circulated widely.

The Chairman and CEO have reported to DFA Board meetings and other grower forums, including branch meetings.

Itineraries

- a) Agenda/program for the 2014 International Dried Grape Conference (San Juan, Argentina)
- b) Agenda/program for the 2015 International Dried Grape Conference (Hamburg, Germany)

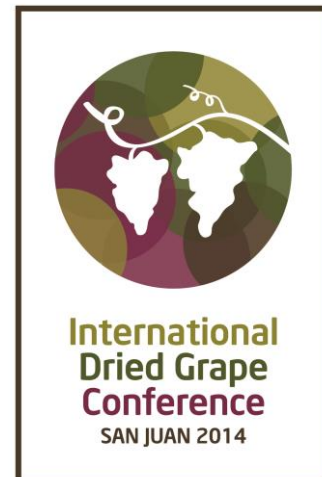
Agenda & Program

9 November 2014

19.45 – 21.15: Welcome Cocktail

21.30 – 22.30: Concert Camerata San Juan in Juan Victoria Hall Auditorium

www.auditorio.sanjuan.gov.ar



10 November 2014:

Reminder: breakfast is served 7.30 - 9:30 AM

8.30 – 09.00: Registration.

09.00 – 12.30: Conference Session.

Official Opening:

- Introduction.

Official Opening Address:

Conference Officials:

- The election of the conference chairman.
- The election of conference deputy chairmen.
- The election of conference Secretary.

Roll Call:

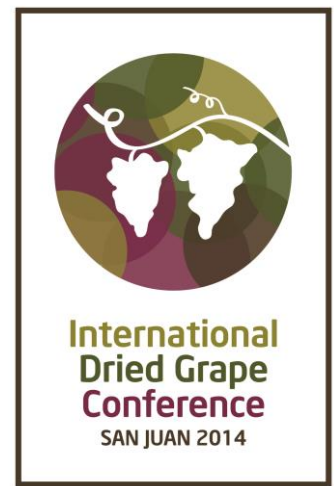
- Signing of the conference agreement.
- Notes of the 2013 Conference:
- Adoption of the notes.

Addresses by the Special Guest:

- Speaker: Dr. Tony Halstead. Topic: Global raisin analysis (pending confirmation).
- Speaker: Professor David Hughes. Topic: Food Marketing Expert

13.00 – 14.30: Lunch.

14.30 – 16.00: Conference Session:



Addresses by the leaders of the delegations:

Presentations by Participating Countries

16.00 – 16.30: Coffee Break.

16.30 – 17.30: Conference Session:

Presentations by Participating Countries

Addresses by the Special Guest:

- Speaker: Frank Zwertz. Topic: Sorter technology. (Visys)

20.30- 22.30: Dinner.

11 de November 2014

TIP: You can have breakfast from 7.30.

08.30 – 11.00: Conference Session:

Addresses by the Special Guest:

Speaker: PhD Arianna Carughi. Topic: Nutrition & Health expert.

Addresses by the leaders of the delegations:

- Presentations by Participating Countries

11.00 – 11.30: Coffee Break.

11.30 – 13.00: Conference Session:

- Speaker: Local Presentation: Argentinean Fly Fruit Program & Argentinean vineyards.

13.00 -15.00: Lunch “History Review “. Institutional photo.

15.00- 16.30: Conference Session:

Production and Marketing Statics.

Press Release.

Next Conference:

- Agree on location of the next conference.
- Agree on the date of the next conference.
- Special invitation to attend the next conference.

16.30-17.00: Coffee Break.

17.00- 18.00: Other Business:

Discussion of the generic advertising

21.00-23.30: Gala Dinner.

12 November 2014

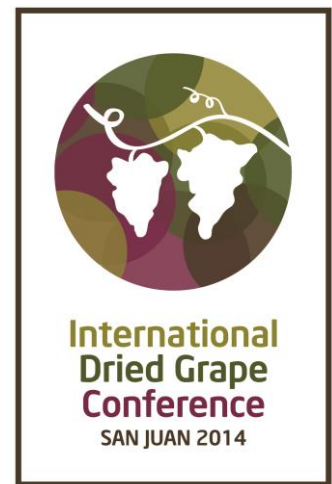
TIP: You can have breakfast from 7.30. Bring cap and sunscreen/sun block.

09.00 – 13.30: Facilities and farm visit.

13.30-15.30: Typical Argentinean Barbeque.

13 November 2014

Tourist Option.





2015 INTERNATIONAL SEEDLESS DRIED GRAPE PRODUCING COUNTRIES CONFERENCE

15-16 OCTOBER 2015 - HAMBURG, GERMANY

AGENDA

THURSDAY 15 OCTOBER 2015

08:30 – 09:30

Registration

09:30

Official Opening

- Introductory Remarks
- Election of Conference Officials
 - o Chairman
 - o Vice-Chairman
 - o Secretary
- Roll Call
 - o Conference to be informed of countries represented with names of respective delegates.
 - o Signing of conference agreement
 - o Notice of motions
 - o Notes of decisions taken at the 2014 conference
 - o Adoption of Agenda
 - o Chairman's address

11:00

Tea / Coffee

11:30

Country Presentations

- Australia
- Argentina
- Chile

13:00

Lunch

14:00

Country Presentations - continued

- Iran
- India
- South Africa
- Turkey
- USA

- **Production Statistics**
- **Presentation by Guest speaker**
An example of a Generic Promotion program in the fruit industry :
Jacques du Preez – Hortgro South Africa.

16:00 **Conference Adjourns**

Evening Free

FRIDAY 16 OCTOBER 2015

09:00 **Start of Session**

Presentation by Guest speaker

- Planning a Generic promotion program for raisins and focus points to be included in such a program by Keith Sunderlal, SCS Group, India.

09:45 **Presentation by Guest speaker**

- Prioritising International Markets for Generic Promotion of Raisins by -
John Giles, Promar International, UK.

10:30 **Tea / Coffee**

11:00 **Presentation by Guest speaker**

- A retail expert's view on what's happening in the dried fruit sector.
Edward Garner, Director of Kantar World Panel UK.

12:00 **Finalise production statistics**

13:00 **Lunch**

14:00 **Press Release**

- Next Conference
 - o Consider countries to be invited
 - o Agree on location of next conference
 - o Agree on dates of next conference
 - o Agree on chair and secretary of next conference
- Finance and Administration
 - o International Dried Grape Conference Account

15:00 **Tea / Coffee**

15:30 **Other Business**

16:30 **Conference Adjourns**

19:00 **Official Conference Dinner**

Recommendations

That the Australian dried grape industry should continue to send delegations to future International Dried Grape Conferences and maintain subscriptions to the publication, Foodnews in order to ensure that the Australian industry has access to current information relating to global production and marketing trends.

Acknowledgements

Project funding was provided by Horticulture Innovation Australia Ltd.

Appendices

- a) Appendix 1 – 2014 International Dried Grape Conference. Summary article published in The Vine (Jan-Mar 2015 edition) entitled "Global dried grape supplies up 7%".
- b) Appendix 2 – DFA Chairman's Report. Article published in The Vine (Oct-Dec 2015 edition) entitled "Industry promotion high on Board agenda".
- c) Appendix 3 – Cover Story. Summary article published in The Vine (Jan-Mar 2016 edition) entitled "Aussie dried grapes take on Europe"
- d) Appendix 4 – News release from 2014 International Dried Grape Conference, including statistics summary report
- e) Appendix 5 – News release from 2015 International Dried Grape Conference, including statistics summary report

Global dried grape supplies up 7%

Global supplies of dried fruit remain relatively stable - this is the main conclusion of the International Conference of Seedless Dried Grape Producing Countries. The annual conference is held in order to exchange information on global production and marketing and this year took place in San Juan, Argentina on 9-12 November, 2014.

Delegations from Argentina, Australia, Chile, South Africa, Turkey and the United States participated in the conference with additional reports from China, Greece, India and Iran. Representing Australia were Dried Fruits Australia Chairman Mark King, Chief Executive Officer Phil Chidgzy, Industry Advisory Committee Chair Tony Martin and grower Board member Stephen Bennett.

The conference heard global production of sultana and raisins has risen slightly in the past year to a total of 1,204,889 tonnes up from 1,141,543t (Table 1). When carryover is taken into consideration there is 1,346,330t available, a 7% increase on 2013. Much of this production comes from Turkey and the United States with 328,000t and 276,000t respectively.

Aegean Exporters Associations Director Necdet Komur reported Turkish production was up from 242,000t in 2013 to 328,000t in 2014. Domestic consumption is relatively low in comparison with 30,000t for human consumption and 20,000t used by distilleries for the production of raki. With 25,000t carried over from 2013 and the



The Australian dried fruits industry was represented by Stephen Bennett (left), Phil Chidgzy, Tony Martin and Mark King.

large 2014 crop the Turks would have over 300,000t available for export.

The 40,000t decline in the US crop was expected and followed a large crop of 313,000t in 2013, with raisin grape acreage remaining constant for the past three years.

About 20-25% of the US crop is dried on the vine (DOV) and a further 30-50% for mechanical harvest with continuous paper trays. The US continues to focus their research efforts on developing improved grape cultivars for DOV and mechanical harvesting and higher yielding grape rootstocks to reduce production costs and reliance on labour. Other research will look at: cane pruning and canopy management for higher yields; advancing raisin grape maturity; reducing fruit damage and successful sustainability practices including grapevine nitrogen replenishment.

Production from both Turkey and the US far exceed their domestic consumption leaving large quantities available for export.

China is the third largest producer after Turkey and the U S, with 180,000t, but most of this is consumed domestically. In contrast, Iran also produces significant quantities of sultanas; however its domestic consumption is relatively low leaving 110,000t available for export.

A large currant crop in Greece pushed production figures for 2014 up to 28,409t, a 20% increase (Table 2) on the previous season.

Global production of Golden increased 1%.

In addition to the production reports from each country, the conference heard a number of industry presentations.

Marketing was again a key topic with United States Department of Agriculture

Table 1: Global production and sale of sultana and raisins (All figures metric tonnes packed weight).

Country	Carryover	Estimated production	Total available product	Domestic consumption	Available for export	Planned carryover	Surplus stock
Argentina	0	27,000	27,000	7,000	20,000	0	2,000
Australia	1,450	12,250	13,700	12,750	950	0	0
Chile	6,600	55,250	61,850	2,000	59,850	0	7,600
China	0	180,000	180,000	150,000	30,000	0	0
Greece	0	5,000	5,000	5,000	0	0	0
India	0	105,000	105,000	105,000	0	0	0
Iran	5,000	145,000	150,000	40,000	110,000	0	10,000
South Africa	2,500	46,000	48,500	11,000	37,500	3,500	0
Turkey	25,000	328,000	353,000	50,000	303,000	0	33,000
USA	100,891	276,389	377,280	185,474	191,806	102,096	0
Uzbekistan	0	25,000	25,000	0	25,000	0	0
Total	141,441	1,204,889	1,346,330	568,224	778,106	105,596	52,600
2013	117,719	1,141,543	1,259,262	539,117	720,145	106,019	9,505
% Diff	20%	5.5%	7%	5%	8%	0%	453%

(USDA) Foreign Ag Service Ag Economist Tony Halstead presenting Raisins: world markets and trade and Dr David Hughes, Professor Emeritus in Food Marketing Imperial College, London, England talking about Global food marketing trends and their implications for dried grape businesses.

USDA Ag Marketing Service Senior Marketing Specialist Terry Vawter added to the conference with an interesting presentation on the US anti-trust rules.

Nutrition research has been key to helping promote dried fruits and increase global consumption. Sun-Maid Growers of California Health and Nutrition Research Coordinator Dr Arianna Carughi reported on the latest findings on the Health benefits of raisins.

Technology, particularly during processing, is constantly being updated and the conference heard from EMEIA Chief Strategy Officer and President Frank Zwerts, and Tomra

Sorting Solutions Sales Manager-South America Johans Germeyns.

Delegates were given an insight into dried grape production in the host country with presentations on Argentinean vineyards (Eng. Martin Pantano); Argentinean fruit fly (Hector Illera) and the local generic raisin campaign (Giselle Alves De Almeida, Production and Exports, Agroindustrias Lusitano).

The next conference will be held in October 2015 in Hamburg, Germany.

Table 2: Global production and sale of Golden and currants (All figures metric tonnes packed weight).

Country	Golden			Currants		
	Carryover	Estimated production	Total available product	Carryover	Estimated production	Total available product
Argentina	0	250	250	0	0	0
Australia	0	0	0	1,125	1,930	3,055
Chile	350	9,750	10,100	400	0	400
Greece	0	0	0	5,000	22,000	27,000
India	0	30,000	0			
Iran	0	30,000	30,000	0	0	0
South Africa	1,000	12,350	13,350	0	2,300	2,300
USA	7,220	15,884	23,104	1,337	2,179	3,516
Total	8,570	98,234	76,804	7,862	28,409	36,271
2013	5,240	97,441	102,681	2,925	23,751	26,676
% Diff	64%	1%	-25%	169%	20%	36%

New varieties field walk

The field walk to observe new 'sultana type' varieties was held at Allan Long's property, on Sunday 18 January 2015.

This followed the rain event that started on Thursday 8 January and continued through to 13 January with a total of approximately 50-60mm of rain.

It was an ideal opportunity for growers who are considering planting new patches to varieties other than sultanas to see how these new varieties grow and yield under commercial production practices as well as seeing how they performed under adverse weather conditions.

Mr Long has a range of new varieties that include: Summer Muscat, Diamond Muscat, DOVine, Sunmuscat, Bruce's Sport and Merbein Seedless all grown on Swingarm trellis on both Ramsey and Paulson rootstocks.

Mr Long indicated that he had summer pruned his DOVine by Thursday

afternoon before the forecast rain in an effort to prevent splitting of the berries and save the crop from these vines. The fruit on the summer-pruned canes came through relatively unscathed; however remaining cordon bunches were severely split.

He indicated that he summer-pruned the Summer Muscat vines on Sunday



Crown fruit from DOVine hung on the trellis wires after cordon picking showing split and damaged fruit.

11 January after the fruit showed signs of splitting.

Following the rain event, the rest of the varieties in the trial patch, including Diamond Muscat showed only minor splitting but not enough to warrant immediate summer-pruning as a salvage operation.

Mr Long said that his Selma Pete grown on a pergola trellis also came through the rain with relatively low splitting of the fruit.

Sunglo again performed well and did not split. It is expected to produce sound, undamaged fruit.

Growers who attended the field walk, found their observations of the performance of these new varieties very useful and will keep it in mind when they decide what variety other than sultana they will replant new patches of vines with.

Aussie dried grapes take on Europe



Dried Fruits Australia Chairman Mark King and Board Member Jenny Treeby met up with Sunbeam Foods International Trading Manager Thomas Cheung at Anuga to observe the Australian promotion and latest food trends.

The good news continues for the dried grape industry following the International Conference of Seedless Dried Grape Producing Countries in Hamburg, Germany on 15-16 October 2015. Delegations from Argentina, Australia, Chile, Iran, South Africa, Turkey and the United States met following the conclusion of the northern hemisphere harvest, to exchange information on world production and marketing.

Dried Fruits Australia Chairman Mark King, Chief Executive Officer Phil Chidgzy and Board member Jenny Treeby travelled to Europe to represent Australia where they heard the area planted to vines for dried grapes is declining in most countries.

"Record returns from the nut industry and a shortage of water is driving the move to remove old or low producing vines," Mr King said.

"China and India are the exception with both countries increasing their acreage."

In other countries unfavourable weather conditions have impacted global production from sultana / natural seedless raisin varieties which is estimated to have decreased by 8% on 2014 levels (Table 1).

Overall, the forecast is for Northern Hemisphere production to drop by over 100,000t, Southern Hemisphere production to increase by about 5,000t and carryover stocks to rise by about 9,000t.

DFA Chairman Mark King represented Australia at the International Conference of Seedless Dried Grape Producing Countries.

The conference also estimated that the total product available for export marketing was likely to drop by 15%. Further analysis of results revealed that at the end of the season only 36,239t will be carried forward to the next season. The conference concluded that this ending stock is smaller than expected and some good planning would be needed to ensure supply to all demands.

Mr King said that the global supply and demand situation should continue to be a positive influence on the dried grape market into 2016.

Unfortunately the news is not so good for currant growers he said.

"While the Greeks continue to produce smaller than usual crops, other countries that produce currants - the US, South Africa and Australia - all had slightly increased levels of production for 2015 which bumped world production from 28,409t last year up to 30,027t in 2015 (Table 2)."

Mr King said the market for currants remains subdued, but a weaker Australian dollar, would help move Australian currants at a realist price.

Global marketing

With the return to a balanced supply and demand for sultanas, participants were keen to build demand for the category through marketing and promotion.

Mr King said Australia and South Africa had raised the concept of a jointly funded international promotion program in the past and received a strong positive response. Conference organisers had taken this one step further and included several presentations to support this stance. The presentations included:

- Louis van Zyl, Hortgro General Manager *Generic promotion program for fresh fruit*

Table 1: Global production and sale of sultana and raisins (All figures metric tonnes packed weight).

Country	Carryover	Estimated production	Total available product	Domestic consumption	Available for export	Planned carryover	Surplus stock
Argentina	2,000	38,000	40,000	7,000	33,000	0	5,000
Australia	200	14,500	14,700	11,700	3,000	0	0
Chile	3,000	58,000	61,000	5,000	56,000	0	0
China	0	120,000	120,000	80,000	40,000	0	0
Greece	0	5,000	5,000	5,000	0	0	0
India	0	140,000	140,000	140,000	0	0	0
Iran	5,000	140,000	145,000	45,000	100,000	0	0
South Africa	3,500	36,800	40,300	10,300	30,000	5,000	0
Turkey	41,000	196,000	237,000	45,000	192,000	0	12,000
United States	96,203	291,770	387,972	179,062	208,910	73,708	19,239
Uzbekistan	0	45,000	45,000	45,000	0	0	0
2015 Total	150,903	1,085,070	1,235,972	573,062	662,910	78,708	36,239
2014	141,441	1,204,889	1,346,330	568,224	778,106	105,596	52,600
% Difference	7%	-10%	-8%	1%	-15%	-25%	-31%

■ John Giles, Promar, UK Divisional Director, *Ways of prioritising international markets for a possible promotion program for raisins*

■ Edward Garner, Kantar World Panel Director, *A retail expert's view on what is happening in the dried fruit sector, including detail information on movements in the dried fruit market*

"Work is continuing on the development of a joint promotion proposal that will focus on the health benefits of sultanas," Mr King said.

"The US has confirmed they are interested in developing the concept, and the next conference will concentrate on the logistics of such a program and the expected gains."

Securing Australia's future

Australia has already initiated its own generic international marketing campaign.

"Dried Fruits Australia realises the need to grow the Australian industry and provide critical mass if we are to have a sustainable future," Mr King said.

"Australian growers have always prided themselves on being able to produce high quality, light coloured dried fruit. However, we have lost ground in the international marketplace in recent years due to low volumes of fruit and must now re-establish Australia as a supplier of premium sultanas.

"We need to lift Australian exports towards 3000t and aim to stimulate investment in the industry through the Dried Vine Fruit Diversification and Sustainability Initiative, ongoing innovation and a continuation of reasonable returns to help to achieve this."

Mr King said it was not enough to simply encourage growers to invest in new plantings, they also need the tools and knowledge to ensure quality fruit can be produced.

"Last year Dried Fruits Australia developed a set of best practice guidelines for growers and the redevelopment of our website and provision of an online library resource for members means growers can access information at any time or place. Meanwhile we continue to improve our production methods, yields and quality with investment in the Producing High Value Dried Grapes project and by facilitating access to new varieties such as Sunglo, Black Gem and Bruce's Sport."

Aussie sultanas in Europe

A Hort Innovation project using the dried grape marketing levy was approved in mid-2015 to promote Australian sultanas in Europe.

Mr King said Dried Fruits Australia had taken a proactive role in promoting Australian dried grapes to overseas markets and designed a high quality promotion document.

"Up until this point the industry didn't have access to quality promotional material to sell the message about Australian quality dried grapes," Mr King said.

"By creating the brochure we can showcase our rich history and the innovative practices and technologies being used in Australia which help encourage efficiency and minimal chemical use.

"We are pushing the quality, plumpness, and great taste of Australian dried fruit, not the colour," he said.

"We believe that the investments we have made in our trellis systems, equipment and production techniques mean that we will always be able to deliver good quality fruit, but it may not always be light in colour.

Mr King said Boesch Boden Spies was appointed agent for the industry and they had run a number of promotional advertisements in the Bako diary and calendar as well as attended trade events including Anuga.

Anuga Trade Fair

While passing through Europe to the conference Mr King and Ms Treeby stopped in at the 33rd Anuga Trade Fair at Cologne, Germany where Boesch Boden Spies had a stand and were promoting Australian sultanas.

Continued on page 6

From page 5

Held every two years, Anuga is a premier trade fair for the food and drinks industry. Mr King said the event continued to grow in popularity and this year there were about 160,000 visitors over the five days.

"More than 7,000 exhibitors from 108 countries showcased products and innovations in the food service industry in an area that spread over 28 hectares," he said.

Dappie Smit of South Africa was elected chairman for the International Conference of Seedless Dried Grape Producing Countries.

"The exhibition space is huge, but when you consider buyers from over 190 countries come looking for inspiration, business contacts and new taste experiences, the reach of Anuga is enormous."

Mr King said the brochures were popular among patrons at the event, many of whom were the key buyers for their company.

He said food safety was a concern in many countries and this provided an opportunity for Australia as buyers viewing the brochure where most interested in the clean and green



Samples of quality Australian dried fruit and a new promotional brochure outlining the industry's strengths at Anuga and other trade shows have helped win back the premium European market.

production and drying of sultanas in Australia.

"There is much to be gained from attending trade fairs such as this and I will be recommending Dried Fruits Australia attends in 2017," he said.

"Similarly, participation at the International Dried Grape Conference

is important as it provides the industry with important access to global networks and up-to-date information on production and marketing trends."

Dried Fruits Australia will attend next year's International Conference of Seedless Dried Grape Producing Countries in China where it is hoped that Uzbekistan may also be represented.

Table 2: Global production and sale of Goldens and currants (All figures metric tonnes packed weight).

Country	Goldens			Currants		
	Carryover	Estimated production	Total available product	Carryover	Estimated production	Total available product
Argentina	0	500	500	0	0	0
Australia	0	0	0	150	1,950	2,100
Chile	500	5,000	5,500	0	0	0
China	0	0	0	0	0	0
Greece	0	0	0	8,000	22,000	30,000
India	0	15,000	15,000	0	0	0
Iran	0	35,000	35,000	0	0	0
South Africa	2,100	20,000	22,100	3,000	3,625	3,625
Turkey	0	0	0	0	0	0
United States	5,052	15,692	20,744	1,085	2,452	3,537
Uzbekistan	0	0	0	0	0	0
2015 Total	7,652	91,192	98,874	12,235	30,027	39,262
2014 Total	8,570	98,234	76,804	7,862	28,409	36,271
% Difference	-11%	-7%	13%	6%	1%	1%

**2014 INTERNATIONAL CONFERENCE OF SEEDLESS DRIED GRAPE PRODUCING
COUNTRIES**

NOVEMBER 9-12, 2014, SAN JUAN, ARGENTINA

PRESS RELEASE

FOR MORE INFORMATION, CONTACT DAPPIE SMIT, CONFERENCE CHAIRMAN

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The International Conference of Seedless Dried Grape Producing Countries was held on November 9-12, 2014 in San Juan, Argentina following the harvest in northern hemisphere countries in order to exchange information on global production and marketing. Delegations from Argentina, Australia, Chile, South Africa, Turkey and the United States participated in the Conference. Reports from China, Greece, India and Iran were also presented.

The Conference was officially opened by:

José Luis Gioja, Governor of San Juan, Argentina

Marcelo Alos, Minister of Production

Leonardo Gioja, Secretary of Politics and Economy

Antonio Giménez, President of the Chamber of Foreign Commerce of San Juan

Dappie Smit of South Africa was re-elected as Chairman of the Conference with Osman Oz of Turkey re-elected as Deputy Chairman. Carlos Javier Huertas Garcia served as Chairman of the Organizing Committee.

Industry presentations were received from:

- Terry Vawter, Senior Marketing Specialist, United States Department of Agriculture-Ag Marketing Service, “U. S. Anti-trust Rules”
- Tony Halstead, Ag Economist, United States Department of Agriculture-Foreign Ag Service, “Raisins: World Markets and Trade”
- Dr. David Hughes, Professor Emeritus in Food Marketing, Imperial College, London, England, “Global Food Marketing Trends and Their Implications for Dried Grape Businesses”
- Frank Zwerts, Chief Strategy Officer and President EMEA, Key Technology
- Dr. Arianna Carughi, Health & Nutrition Research Coordinator for Sun-Maid Growers of California, “Health Benefits of Raisins”
- Johans Germeys, Sales Manager-South America, Tomra Sorting Solutions
- Giselle Alves De Almeida, Production and Exports, Agroindustrias Lusitano, “Local Generic Raisin Campaign”
- Hector Illera, “Argentinean Fruit Fly”
- Eng. Martin Pantano, “Argentinean Vineyards”
- Mark King, Chairman, Dried Fruits-Australia briefed the Conference regarding the bank account balance.

Following reports from all participating producing countries, a global supply and demand chart was compiled and is attached to this press release. The Conference considered the world supply and demand position and noted that seedless dried grape production from the Sultana/Natural Seedless Raisin varieties increased by 7% from the previous year.

Global production of Goldens increased 1%, while it was noted that the production of currants increased by 20% compared to the previous season.

The next Conference will be held in October 2015 in Hamburg, Germany.

2014 International Seedless Dried Grape Producing Countries Conference Statistics

Variety: Sultana & Raisins (All figures metric tonnes packed weight / Goldens or sulphur bleached reported separately below)										
Country	Estimated physical stock 31/08/2014	Estimated production Northern Hemisphere 1/10/2014	Estimated production Southern Hemisphere 28/02/2014	Total estimated available product for marketing	Estimated invoiced domestic sales 1/9/2014 to 31/8/2015	Balance available for export marketing	Estimated invoiced export sales 1/9/2014 to 31/8/2015	Estimated physical stock as at 31/08/2015	Planned carryout required to maintain supply between seasons	Surplus stocks to estimated sales and planned carryout
Greece	0	5,000		5,000	5,000	0	0	0	0	0
Iran	5,000	145,000		150,000	40,000	110,000	100,000	10,000	0	10,000
Turkey	25,000	328,000		353,000	50,000	303,000	270,000	33,000	0	33,000
USA	100,891	276,389		377,280	185,474	191,806	89,710	102,096	102,096	0
Uzbekistan		25,000		25,000	0	25,000	25,000	0	0	0
China	0	180,000		180,000	150,000	30,000	30,000	0	0	0
Argentina	0		27,000	27,000	7,000	20,000	20,000	0	0	2,000
Australia	1,450		12,250	13,700	12,750	950	950	0	0	0
Chile	6,600		55,250	61,850	2,000	59,850	59,850	7,600	0	7,600
S. Africa	2,500		46,000	48,500	11,000	37,500	34,000	3,500	3,500	0
India	0		105,000	105,000	105,000	0	0	0	0	0
Total	141,441	959,389	245,500	1,346,330	568,224	778,106	629,510	156,196	105,596	52,600
2013	117,719	852,573	288,970	1,259,262	539,117	720,145	605,200	112,666	106,019	9,505
% Diff	20%	13%	-15%	7%	5%	8%	4%	39%	0%	453%

Varieties: Goldens & Currants (All figures metric tonnes packed weight)

Country	Estimated physical stock 31/08/2014	Goldens Estimated Production 2014 crop	Total estimated available product for marketing	Estimated physical stock 31/08/2014	Currants Estimated production 2014 crop	Total estimated available product for marketing
Greece	0	0	0	5,000	22,000	27,000
Iran	0	30,000	30,000	0	0	0
Turkey	0	0	0	0	0	0
USA	7,220	15,884	23,104	1,337	2,179	3,516
India	0	30,000				0
Uzbekistan	0	0	0	0	0	0
China	0	0	0	0	0	0
Argentina	0	250	250	0	0	0
Australia	0	0	0	1,125	1,930	3,055
Chile	350	9,750	10,100	400	0	400
S. Africa	1,000	12,350	13,350	0	2,300	2,300
Total	8,570	98,234	76,804	7,862	28,409	36,271
2013	5,240	97,441	102,681	2,925	23,751	26,676
% Diff	64%	1%	-25%	169%	20%	36%

Press Release

2015 International Seedless Dried Grape Producing Countries Conference – 15-16 October 2015 Hamburg, Germany

The International Seedless Dried Grape Producing Countries Conference was recently held in Hamburg, Germany following the conclusion of the northern hemisphere harvest, to exchange information on world production and marketing. The delegations from Argentina, Australia, Chile, Iran, South Africa, Turkey and USA participated in the conference.

Mr Dappie Smit of South Africa was elected chairman for the conference, Mr Carlos Javier Huertas Garcia of Argentina and Mr Osman Oz of Turkey were elected deputy chairmen.

Conference considered the world supply and demand position and noted seedless dried grape production from the Sultana / Natural Seedless Raisin varieties had decreased mainly due to unfavourable weather conditions.

The conference received presentations from guest speakers on marketing and promotion as the producing countries are considering a mutually funded promotion program.

Mr Louis van Zyl of the South African Fruit Company Hortgro made a presentation on a generic promotion program for fresh fruit.

Mr John Giles of Promar in the UK made a presentation on ways of prioritising international markets for a possible promotion program for raisins.

Mr Edward Garner, Director of Kantar World Panel gave a retail expert's view on what is happening in the dried fruit sector which included detail information on movements in the dried fruit market.

The statistical analysis undertaken at the conference showed that the total availability of Natural Seedless Raisins (TSR's) and Sultanas has decreased by eight percent. The analysis also revealed that at the end of the season only 36239 tons will be carried forward to the next season. Conference concluded that this ending stock is smaller than expected and some good planning would be needed to supply all demands.

The conference agreed to invite other producing countries, such as China and Uzbekistan, again to be present at the 2016 conference.

With regard to the supply situation for currants it was noted that the recent trend of smaller Greek crops had continued and world production was thirty thousand tons compared to twenty eight thousand tons last year. The other producing countries of currants, the USA, South Africa and Australia reported slightly increased levels of production for 2015.

The conference recorded the attached 2015 seedless dried grape production estimates.

It was also confirmed that the next conference will be in China during October/November 2016. Mr Dappie Smit from South Africa was re-elected as Chairman for the next year.

2015 International Seedless Dried Grape Producing Countries Conference Statistics

Variety: Sultana & Raisins (All figures metric tonnes packed weight / Goldens or sulphur bleached reported separately below)										
Country	Estimated physical stock 31/08/2015	Estimated production Northern Hemisphere 1/10/2015	Estimated production Southern Hemisphere 28/02/2015	Total estimated available product for marketing	Estimated invoiced domestic sales 1/9/2015 to 31/8/2016	Balance available for export marketing	Estimated invoiced export sales 1/9/2015 to 31/8/2016	Estimated physical stock as at 31/08/2016	Planned carryout required to maintain supply between seasons	Surplus stocks to estimated sales and planned carryout
Greece		5 000		5 000	5 000	0	0	0		
Iran	5 000	140 000		145 000	45 000	100 000	95 000	5 000		
Turkey	41 000	196 000		237 000	45 000	192 000	180 000	12 000		12 000
USA	96 203	291 770		387 972	179 062	208 910	115 964	92 946	73 708	19 239
India		140 000		140 000	140 000	0				
Uzbekistan		45 000		45 000	45 000	0				
China		120 000		120 000	80 000	40 000	40 000			
Argentina	2 000		38 000	40 000	7 000	33 000	28 000	5 000	0	5 000
Australia	200		14 500	14 700	11 700	3 000	3 000			
Chile	3 000		58 000	61 000	5 000	56 000	51 000	5 000		
S. Africa	3 500		36 800	40 300	10 300	30 000	25 000	5 000	5 000	0
Total	150 903	937 770	147 300	1 235 972	573 062	662 910	537 964	124 946	78 708	36 239
2014	141 441	1 064 389	140 500	1 346 330	568 224	778 106	629 510	156 196	105 596	52 600
% Diff	7%	-12%	5%	-8%	1%	-15%	-15%	-20%	-25%	-31%

Varieties: Goldens & Currants (All figures metric tonnes packed weight)

Country	Estimated physical stock 31/08/2015	Goldens Estimated Production 2015 crop	Total estimated available product for marketing	Estimated physical stock 31/08/2015	Currants Estimated production 2015 crop	Total estimated available product for marketing
Greece	0	0	0	8 000	22 000	30 000
Iran	0	35 000	35 000	0	0	0
Turkey	0	0	0	0	0	0
USA	5 052	15 692	20 774	1 085	2 452	3 537
India	0	15 000	15 000	0	0	0
Uzbekistan	0	0	0	0	0	0
China	0	0	0	0	0	0
Argentina	0	500	500	0	0	0
Australia	0	0	0	150	1 950	2 100
Chile	500	5 000	5 500	0	0	0
S. Africa	2 100	20 000	22 100	3 000	3 625	3 625
Total	7 652	91 192	98 874	12 235	30 027	39 262
2014	8 570	98 234	76 804	7 862	28 409	36 271