# Horticulture Innovation Australia

# **Final Report**

**2016 IPA Congress Tour** 

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#### **DP16700**

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## **Contents**

Summary	3
Keywords	
Outcomes	6
Results of Discussions	
Implications for Australian Horticulture	8
Dissemination of Information	10
Itinerary	11
Recommendations	13
Acknowledgements	14
Contact List	15
Appendices	16

## **Summary**

The International Prune Association (IPA) holds a Conference every 18 months to receive updates, discuss and exchange information on:

- The global prune industry supply/demand situation and outlook
- The best practice production techniques and new techniques
- Recent research projects in all producing countries
- Promotion initiatives aimed at increasing consumption of prunes

The IPA has the following objectives:

- To set up a permanent link between world prune producers
- To co-ordinate actions aimed at protecting producers' interests
- To increase world consumption of prunes
- To encourage and develop the exchange of up to date information concerning production and market trends between members
- To organise meetings between members of economic interest

Further, membership of the Association is open to:

- Prune growers
- Prune growers/packers recognized as significant growers by the members of their country
- Organisations representing prune producers

#### **Objectives**

The global outlook for the prune industry has improved significantly in recent times, with lower production ensuring that global supply and demand are much more in balance. However, in the past year world production has dropped significantly due to short crops in California. Market reports suggest that much improved prices are being paid for this product due to an imbalance with supply.

The IPA Conference is an important forum that brings all the major players together with the aim of building co-operation across the producing countries and ensuring a sustainable future for the industry.

The continuing exchange of international supply and demand data, as well as co-operation in relation to research in to nutrition and health aspects of prunes are good examples of this co-operation.

The objectives of the project include:

- Information sharing. The IPA conference and associated field trips provide delegates and observers
  with access to important information about the world market outlook as well as factors impacting
  production levels. Gathering the information is important in assisting Australian prune growers to
  become more competitive.
- Awareness. Delegates and observers are made aware of different aspects of prune production and processing from other prune producing countries.

- Technology transfer. Delegates can gather information about new technologies and innovations developed by other member countries.
- Networking. Delegates and observers, who participate in this conference event, can establish
  contacts with growers, processors, packers, marketers and researchers from other member
  countries.
- Co-operation. Participation at the IPA conference enables the Australian industry and other IPA member countries to work together to achieve benefits for producers in all member countries.

# **Keywords**

Chile, Dried Plum, Prunes, Dehydration, Pitted, Non-pitted, Quality, Brix, Itinerary, Contacts, Study Tour, Report, International, Conference, IPA, Marketing, Research, Processors, Solar, Sun-Drying, Bone Health, Nutrition

## **Outcomes**

The expected outcomes or objectives of the Study Tour have been outlined in the Summary. An outline of how these objectives were met is detailed below:

- Information sharing. The IPA country members each presented Country Reports sharing information
  on production and sales statistics, quality assurance, promotions and the outlook for the prune
  industry in their country.
- Awareness. Delegates and observers discuss new and existing aspects of prune production and processing during the conference. Elements were shared in the Country Reports and promotional activities were shared which are valuable to Australia.
- Technology transfer. Several guest speakers shared information on new and improved technology in the prune industries and delegate observed some of this new technology on the field trip.
- Networking. Delegates and observers, who participate in this conference event, can establish
  contacts with growers, processors, packers, marketers and researchers from other member countries
  sharing details and continuing to stay in contact after the conference has finished.
- Co-operation. All member countries are investing in joint health research on the effect of bone health from consuming prunes in postmenopausal women. Consumers are extremely health conscience and are looking for easy, convenient snacks that are healthy so this joint study may benefit all member countries if the results are positive.

## **Results of Discussions**

Australian's attendance at the IPA Conference has confirmed the value of ongoing liaison and networking with major overseas producers of dried prunes.

All members who participated and the industry stakeholders who read the reports, have gained a better understanding of the global dried prune industry and most importantly, the improved outlook for dried prunes because of the reasonable balance in world supply and demand.

The findings from the IPA Conference have been outlined in summary articles published in The Vine publication (a joint Dried Fruits Australia, Australian Table Grape Association magazine) which is distributed to all prune growers on a quarterly basis.

In addition, a radio interview was aired in November on ABC's Country Hour, the Area News published an article in December and The Land conducted an interview in early December, article to be published soon.

An article for the Hortlink online newsletter will be provided to HIA.

## **Implications for Australian Horticulture**

The IPA conference has again confirmed that the all member countries are facing similar issues to those confronting growers in Australia.

Reduced availability and rising cost of labour, strong competition from other crops, reduced government funding for research, unpredictable weather conditions (drought/frost/hail) and reduced supply and high cost of water are just a few of these.

The world prune orchard has stabilized as the rapid expansion of prune plantings in Chile and Argentina has stopped and the rapid removal of prune plantings in the US and France has slowed.

Environmental factors, such as cold wet weather at bloom or frost and hail fruit set, in the post 12 months has contributed to 3 major areas producing lower than expected yields. During bloom in Californian growers experienced cold, wet weather and Chile and Argentina in spring 2016 where hit with hail and frost, resulting in short crops

This means that the world production levels are currently low. This has resulted in a stable price for Australian growers.

Australia may be able to take advantage of the stabilised world prune orchard and increase plantings slowly to avoid supply and demand issues. Controlled growth was the message conveyed to the member countries however current production costs and drying capacity that is currently in use may be a prohibiting factor.

The Californian Dried Plum Board with smaller contributions from member countries, continue to invest significant funds into health and nutrition research – providing results which benefit the global dried prune industry. Continued research into the benefits on bone health from consuming prunes will provide results in 2019. All member countries can use this information to promote the health benefits of prunes.

The Chilean sun-drying (solar) technology could be implemented in Australia as we have similar climatic conditions to Chile. This technology should be further investigated to see if it suits the Australian conditions. Sun-drying would help the industry reduce the cost of production for growers and would reduce the industries carbon foot print, making it more sustainable and cost effective. This could be used in promotional activity to promote a clean-green sustainable industry. This technology can also be used for drying other horticultural products.

For new orchard developments or in a re-plant situation closer tree spacing may produce higher yielding crops. Growers in Chile and Argentina plant trees as close as 4m x 3m which they say produces 4 tonnes per acres of dried prunes. Prior to establishing an orchard with closer plantings, several factors should be researched such as: orientation of the orchard, harvest equipment, pruning techniques, the cost of establishing a new orchard and the availability of drying space.

Producing a quality prune consistently was a major message from the IPA Congress that will be shared throughout the Australian Prune Industry. Encouraging Australian dehydrators to implement the new Dry Right Quality Assurance Program in 2017 will help improve the consistency of the Australian product. Consumers will be confident that the product is safe and of high quality.

Production techniques such as pruning and thinning will continue to be modified for the Australian environment so prune producers supply large high quality fruit that processors can pit. Chile and Argentina are slow adapting these techniques from the Californian's however they tend to still produce smaller prunes.

The South African prune industry are investigating pitting fresh plums before drying to increase pitting ratios, reducing the cost of production and improving flavour but reducing the amount of times the plums are exposed to extreme heat and cooled. This technology may allow the small fruit that is grown to have value.

There were strong signals from the majority of presenters that small prunes are not worth any money and are also hard to move in the market. Considering the global supply/demand is in balance and to have an



## **Dissemination of Information**

Following the IPA Conference, all delegates, that received funding, were required to provide input for a joint report on their observations and conclusions.

Thus, summary articles were published in *The Vine* (January – March 2017 edition)

Prior to the study tour an article was published in *The Vine*.

All presentations at the IPA Conference can be found on the IPA website; www.ipaprunes.org

## **Itinerary**

#### **GROWING TASTY AND HIGH QUALITY PRUNES FOR THE WORLD**

#### 1 PRE CONGRESS FIELD TRIP TO ARGENTINA (3th to 6th of November)

Nov 3, Thursday

09:00 - 12:00 Arrival to Mendoza and check in at Park Hyatt Hotel.

12:00 - 14:00 Free time for lunch.

14:00 Departure from hotel to orchards.

15:00 - 18:00 Visit to "Consorcio Argenprune" orchards. 20:00 Dinner with Promendoza, Inta and IDR. (Included in program) Important: The Mendoza Airport will be closed from September to December. We recommend using San Juan airport and report your flight details to ChilePrunes

(chile2016@ipaprunes.org) to schedule transportation to Mendoza (2 hour trip).

Nov 4, Friday

08:00 Check out and departure to San Rafael. 11:00 - 13:30 Visit to orchards in San Rafael 13:30- 15:00 Lunch. (Included in program)

15:30 - 18:00 Visit to processing facilities and orchards.

(Nevada Argentina, Pietrelli Prunes)

19:00 Check in at Tower Inn hotel and free evening.

20:00 Dinner. (Included in program)

Nov 5, Saturday

08:00 - 11:30 Visit to orchards in San Rafael. 11:30 - 13:00 Departure to Uco valley. 13:00 - 14:30 Lunch. (Included in program) 14:30 - 16:30 Visit to orchard in Uco valley area. 17:30 Check in at Park Hyatt Hotel Mendoza. 20:00 Closing dinner. (Included in program)

Nov 6, Sunday

07:30 Check out to take the bus from Mendoza to San Juan Int. Airport.

12:00 Flight to Santiago, Chile.

#### PA CONGRESS, RITZ HOTEL-SANTIAGO (7th to 8th of November)

#### Nov 7, Monday

Official Opening Ceremony. 09:00 - 09:30 09:30 - 10:00 General Assembly IPA. 10:00 - 10:30

Coffee break 10:30 - 13:00

Country presentations (statistics and marketing activities).

13:00 - 14:30 Lunch.

Taste & Quality definition, market demand. 14:30 - 15:10

Pedro Torrijos, IMPORTACO

15:10 - 15:50 Global Prune Promotion: Encouraging world prune consumption.

Donn Zea, Executive Director California Dried Plum Board.

15:50 - 16:10 Coffee Break.

16:10 - 17:00 Round Table. Free Evening.

**Nov 8 Tuesday** 

09:00 - 10:30 Growing high quality prunes. California Prune

Advisor.

Mr. Joe Turkovich, Sunsweet Growers, California.

10:30 - 11:00 Coffee break.

11:00 - 12:30 Quality Prunes: A Profitable Business. Cristián Valdés, Prune Advisor

AGRO AL CUBO.

12:30 - 14:00 Light lunch at congress place. The activities continue in the afternoon

with "FIELD TRIP TO CHILEAN PRUNE INDUSTRY".

#### 3 FIELD TRIP TO CHILEAN PRUNE INDUSTRY (8th to 9th of November)

#### **Nov 8 Tuesday**

14:00 Buses leave from Ritz Hotel to visit a technified sun drying facility in Rosario (90 min drive).

18:30 Arrival at Hector Claro's farm in San Bernardo.

18:30 - 21:00 Dinner at Hector Claro's farm. 21:00 Buses leave to hotels (35 min drive).

Nov 9, Wednesday

09:00 Buses leave from Ritz Hotel to Buin area.

#### REGISTER AND ASSIST THE CONGRESS ACTIVITIES: chile2016@ipaprunes.org www.ipaprunes.org

10:00 - 11:00 Visit to Frutexsa processing plant and orchard.

11:00 - 12:30 Visit to prune orchards in Buin. 13:00 - 16:00 Lunch at Santa Rita Winery. 16:00 Buses return to hotels (60 min drive)

#### 4 POST CONGRESS TOUR (10th to 13th of November)

#### Nov 10, Thursday

07:00 Buses leave to airport. Flight to Puerto Montt.

10:00 Flight departure. (90 min flight)

12:00 Buses take route to Dalcahue (2 hrs drive). Check in on board "El Alba"

vessel.

14:30 Lunch on board sailing to Mechaque island.

18:00 Visit to Mechuque Island.20:00 Dinner on board.

Nov 11, Friday

**08:30** Navigation trough the canals and islands arriving to Bahia Pumalin.

13:00 Luch on board.

**16:00** Hiking to the bay, fly - fishing.

12:00 Dinner on board.

Nov 12, Saturday

09:00 Sail to Quehui island.13:00 Typical barbecue lunch.

16:00 Visit to the Quehui church and tourist sights in and around.

20:00 Dinner on board.

Nov 13, Sunday

**08:00** Departure to Dalcahue, breakfast during navigation.

10:30 Visit to the local market in Dalcahue...

12:00 Lunch on board.

13:00 Drive to Castro airport (15 min drive)

14:15 Flight to Santiago.

17:15 Arrival to Santiago airport, international connections

#### II. PROGRAMME FOR ACCOMPANYING GUESTS (7th to 9th of November)

#### Nov 7, Monday

**09:00** Buses leave from Ritz Hotel for visit to Valparaíso.

11:00 - 13:00 City tour in Valparaiso.

13:00 - 15:00 Lunch at Turri restaurant in Valparaíso.

**15:00 - 17:00** Visit to Viña del Mar. **17:00** Buses leave to Santiago (90 min drive)

19:00 Return to hotel.

19:00 Return to note.

Nov 8. Tuesday

**09:30** Bus leaves from Ritz Hotel.

**10:00 - 11:30** Visit to Museo Chileno de Arte Precolombino (pre-Columbian arts and

crafts museum).

11:30 - 13:00 Tour throughout downtown Santiago (La Moneda, Cerro Santa Lucía,

Museo de Bellas Artes).

**13:00 - 15:00** Lunch.

15:30 Return to hotel.

17:00 Bus leaves from Ritz Hotel for dinner at Hector Claro's farm in San

Bernardo.

**21:00** Buses return to hotels.

#### Nov 9, Wednesday

10:30 Buses leave to Sta. Rita Winery (1 hour drive).11:30 - 13:00 Visit to winery and archeological museum.

13:00 - 16:00 Lunch at Santa Rita Winery.

**16:00** Return to hotels.

20:00 Official closing dinner (venue to be confirmed).

## Recommendations

#### For the Industry:

- •That the Australian Prune Industry Association should continue to maintain direct contact with relevant IPA member countries to keep Australian growers fully informed about market trends and new technologies that may be adapted for use by Australian growers.
- •That the Australian Prune Industry Association should continue to evaluate new and old varieties and include rootstocks at the variety trial sites.
- •That the Australian Prune Industry Association should encourage all growers to deliver a consistently high quality product, that is safe for the consumer.
- •That the Australian Prune Industry Association should encourage new investments into value added products, helping to reduce waste and increasing returns to growers.
- •That the Australian Prune Industry Association should continue to investigate sun-drying technology to reduce the industries carbon foot print. Sun-drying innovations outlined by the Chileans look very promising and should be considered as an alternative to traditional dehydration, reducing the costs and therefore increasing the grower margins.
- •That the Australian Prune Industry Association should investigate consumer requirements to tailor products to meet their needs. Understand what consumers want or need to know about dried prunes and strategically promote new and old products.
- •That the Australian Prune Industry Association should encourage slow steady growth to reduce the chance of a boom/bust cycle seen in the past, emphasizing that quality is high on the agenda.
- •That the Australian Prune Industry Association should continue to better educate consumers about the health benefits of prunes, changing the focus from just digestive health benefits.
- •That the Australian Prune Industry should investigate yields and the cost of inputs of orchards that are planted with closer spacing's.

## **Acknowledgements**

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## **Appendices**

# **IPA World Congress**

# Chile: Quality and consistency are key for dried plums

Australians were among the 300 delegates attending the International Prune
Association (IPA) Congress held in Santiago, Chile on 7-9 November. Organised by the IPA in partnership with Chile Prunes, the congress broken.

on 7-9 November. Organised by the IPA in partnership with Chile Prunes, the congress brought together the world's top prune producers and exporters from the United States, Argentina, France, Italy, Australia and South Africa.

## **Chilean prunes**

Launching the event, Minister of Agriculture, Carlos Furche spoke about the challenges ahead as the Chilean prune industry continued to develop. He stressed the importance of continued work on health issues as the passport to enter international markets, and the need to expand markets.

He said China, which is currently the second biggest destination for Chile and has a 17% annual export growth rate, was going to become its main market destination. However, permanent technological innovation was required along the entire chain, from managing the orchards, to labelling the products; and the industry could not be competitive without it.

ProChile's newly appointed Director, Alejandro Buvinic said the sector had 12% annual growth for the last four years and would achieve exports of 200 million dollars in 2016. Additionally, he said, the sector has important growth potential in China, the US, Canada, and Mexico.

## Fruit size and quality

At the IPA Congress the member countries deliver a snap shot of activities that are taking place at home. There was a standard pattern throughout all the countries and that was a major focus on producing consistent size and quality fruit.

According to Pedro Pablo Diaz, President of Chile Prunes, one of the biggest global challenges for the industry is to have primarily large sized dehydrated plums with the best taste, quality and a good sugar content. To tackle the problem the technical services team delivers a size and brix improvement program and they have been learning from the Californians about how to prune and thin their trees to maximise these quantities.

Mr Pablo Diaz said there was still much to learn about the thinning of the plants to achieve better size, however, quality did not stop at the farm gate. "We need all chain participants - producers, processors, exporters, importers and retailers - to take on the challenge of producing a great product for consumers by managing the fields, marketing, and promoting their products in the best way possible," he said.

Pedro Torrijos, Latin America's Director of Importaco, reiterated the importance of quality. He said the only path to leadership was for companies to be leaders in quality. "We must tear down the paradigm where quality and food safety are associated with a high cost.



The congress is a time to meet new people in the industry and catch up with others from across the globe. Grant Delves (right) takes the opportunity to talk to Christopher, a French grower, while visiting orchards in Chile.

"In that sense, I invite you all to review your processes and to remember that consumers expect their plums to be consistent, large and of similar calibres, colour, texture, and with no pits."

Mr Torrijos said in 2008 1% of the products sold by Importaco had remains of pits, but the company decreased this to less than 0.05%. "By working closely with our suppliers, we no longer receive complaints regarding pit remains in our plums. We sell 55% of the dried plums in Spain, and our product is of Chilean origin," he added.

IPA President Hector Claro reminded delegates that offering a high quality and good tasting product required a lot of work and effort. If expectations of quality were not met there was a

cost for the entire industry, especially in regard to supermarket shelf positioning where a new fruit could appear at any moment and monopolise that space.

### **Promotion**

Donn Zea, Executive Director of the California Dried Plum Board, said the industry had reasons to be optimistic; among other things because of the growing importance that healthy products have worldwide and because people are starting to replace their lunch and dinner with snacks. In that sense, prunes have won a space.

The US and Chile are leading the charge on promotional activities with both countries heavily involved in social media engagements, food shows, dinners and celebrity endorsements. Australian representative to the IPA and Australian Prune Industry Association

Chairman, Grant Delves, told of Australia's idea about promotions, and while APIA's generic promotion will be on a much smaller scale than the US or Chile, it should still be very effective.

Outgoing IPA Chairman, Christian Amblard of France, spoke briefly about the IPA World Nutrient Research Program which is jointly funded by

Californian Dried Plum Board and the IPA. It includes studying the effect eating prunes has on bone health. The project will continue until 2019 where the IPA is hoping to share some positive news.



Trees are protected with hail netting, and flood irrigated. Note the close tree spacing.

## Global production

Not only was quality a focal point of the congress, but also the reliability of supply.

Mr Amblard also spoke about world prune statistics, and said that the world orchards had stabilised with average production predicted over the coming years.

However, several major pruneproducing countries have reported small tonnages due to poor weather conditions. California supplies 40% of the world market, but this year produced its smallest crop on record. Argentina has also suffered from extreme weather events and will have reduced supply.

This has put a strain on supplying consumers with a consistent product. Countries like US and Australia are relying on imported fruit from Chile to fill domestic orders.

Chile, the largest exporter of prunes in the world produces about 80,000t, but plans to increase its prune production by an extra 10,000t with extra plantings. If this occurs, the increased supply will negatively affect prices which would be a shame for everyone.

#### Production

The second half of the congress saw several guest speakers address the audience talking

member Joe Turkovich spoke about the importance of light interception, orchard orientation and mechanical thinning. These were mentioned to the Australian growers that attended the Thinning Field Day 12 months ago, in Bilbul.

#### Technical tours

After the official proceedings of the congress were finalised delegates visited a high-tech sun drying facility in Rosario. This was first brought to our attention at the last congress in Italy 18 months ago and was of interest to many of the delegates.

The following day we continued with the technical tours, visiting orchards and Frutexsa a major prune processor in the Buin area.

Frutexsa not only grows and processes prunes, but also walnuts, sultanas and cherries. The orchards were flood irrigated and looked to be pruned hard to achieve optimum size.

It is a big operation, grading 120t of dried prunes each day on two machines running constantly over three 8-hour shifts. Four to five years ago, Frutexsa introduced an environmentally friendly waste management system to differentiate themselves from their competitors. The processing plant, reuses 100% of the waste water for irrigations and

about production to maximise returns. Californian Dried Plum Board and Sunsweet Board composts the solid waste.

A list of notes from the IPA Congress is available online at www.ipaprunes.org.

# **IPA Congress report**

# On the road in Argentina



In early November, seven Australians joined international delegates from

France, Italy, the United States,

Chile and South Africa on a 3-day tour of several prune growing regions in Argentina. The tour was organised as a prequel to the International Prune Association (IPA) Congress in Santiago, Chile, and showcased the Mendoza and San Rafael areas of Argentina, with visits to orchards, drying facilities and a processor.

This spring Argentinian growers have been badly affected by frost. Most of the growers we visited had experienced huge crop loss following 5-8 weather events that were as low as -8°C.

This is not unusual, production in Argentina is volatile due to the severe frost and hail weather events. One year production can be as high as 40,000 tonne and the next year it can be less than 10,000t (Figure 1).

In a good year, Argentinian growers harvest up to 9.88t/hectare (4t/acre) of dried fruit. This is generally higher than Australian production and perhaps one of the influencing factors is tree spacings. Argentinian growers tended to plant their trees closer than Australia growers would, some as close as 5m x 3m.

There were mixed messages about the quantity of fruit that was sundried or tunnel-dried using gas; however, it appears the larger growers are moving to tunnel drying.

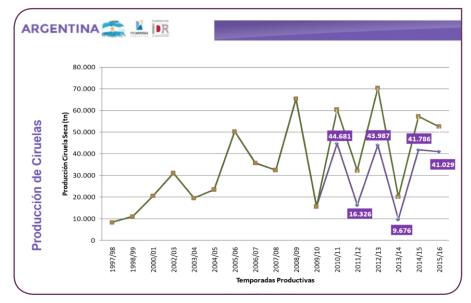


Figure 1. Variable production of prunes in Argentina.

"In a good year, Argentinian growers harvest up to 9.88t/ hectare (4t/acre) of dried fruit."

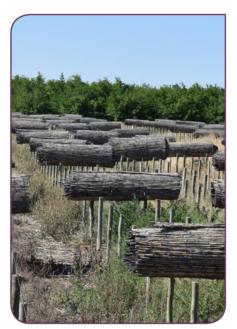
Fruit is solar dried on long bamboo mats laying on racks built off the ground for up to 21 days. During the 21 days three lots of fruit are added to the mats, with the fresh fruit piled on top of dried fruit; this allows the fruit to dry more evenly. It is extremely labour intensive, but is achieved at a very low

cost with Argentinians reporting they can harvest by hand and lay the fruit on the drying racks for 10c/kg.

Argentina is not a member of the IPA, but plans to join in 2017 through the newly formed East Mendoza Prunes Exporting Consortium. The consortium, known as Ciruelas del Sur, is made up of the Eastern producers: Pedro Marcuende of Finca Doña Carmen;

Juan Jose Villar; Finca Savoini, Fruttino SA, Federico Pontoni; Watercolor Posta Sonia and Liliana Ferro.

More information about the Argentinian tour will be available in the APIA Project report.





Fruit is sun-dried on bamboo mats on Aussies from Left: Michael Zalunardo, Grant Delves (APIA Chairman, IPA Rep), Ann raised drying racks in Argentina. Furner (IDO), David Swain (Angas Park), Frank De Rossi and Del Zalunardo.

22 The Vine • Jan - Mar 2017\_



Figure 1 CK2 Sun Drying Tunnels



Figure 2 APIA Chairman and Australian Representative to the IPA, Grant Delves, presenting Australia's information