



# ACOTANC BULLETIN

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Mid 1993

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Chart 1.4: Australian fresh and processed horticultural exports by category, 1991-92, \$ million

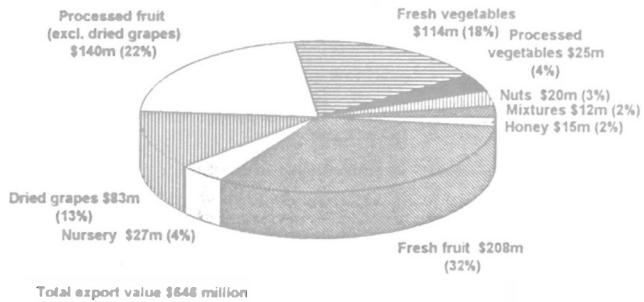
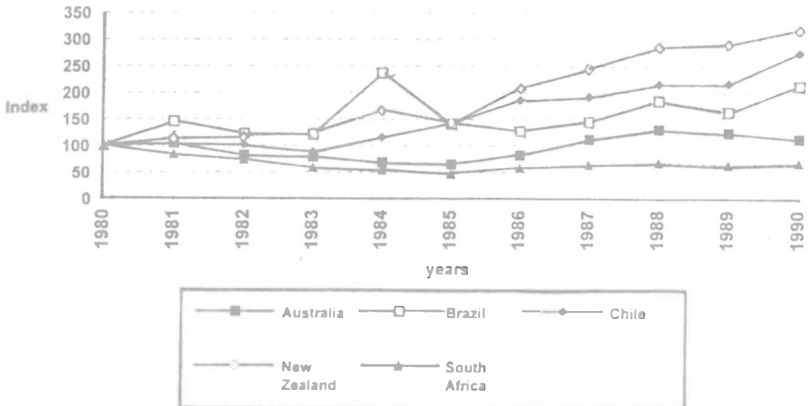


Chart E1: Fruit and vegetable exports of selected countries, 1980 to 1990, 1990 US dollars (1980 = 100)



Source: Table E6.

# ACOTANC Inc

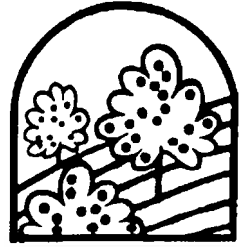
(Australasian Council/Conferences On Tree And Nut Crops)

PO Box 91, Lismore Heights, NSW 2480, Australia

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President: Bill Taylor

Secretary: Merv Richens



## ACOTANC-95

Australasian Conference On Tree And Nut Crops

Lismore, New South Wales, Australia

Mid-September 1995

PO Box 91, Lismore Heights, NSW 2480, Australia

Phone: (066)-24 3211 • Fax: (066)-24 1007

Conference Secretary:

## ACOTANC-98

Australasian Conference On Tree And Nut Crops

Hawke Bay, New Zealand  
1998

c/o New Zealand Tree Crops Association Inc

PO Box 14053, Hamilton, New Zealand

Conference Secretary:

## ACOTANC-2001

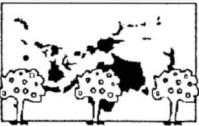
Australasian Conference On Tree And Nut Crops

Western Australia  
2001

c/o West Australian Nut & Tree Crop Association Inc

PO Box 565, Subiaco, WA 6008, Australia

Conference Secretary:



## ACOTANC BULLETIN

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Submissions of articles, comments, or letters for Acotanc Bulletin are welcome. If text is available on computer disc (Macintosh preferred), this is much appreciated. Contact the Editor at the Tree Crops Centre.



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## **Welcome to the very first issue of Acotanc Bulletin.**

Acotanc Bulletin is produced for ACOTANC Inc, the Australasian Council on Tree And Nut Crops — an umbrella group whose participants are themselves organizations with interests in productive perennial plant crops.

Acotanc Bulletin will be issued twice each year, and will carry news of general regional interest, news on forthcoming ACOTANC conferences and events, book reviews, and oversight views on particular tree crop industries and trends.

All recipients and readers are asked to respond to the Editor if they would like to receive later issues, and are urged to encourage their own organizations to participate in ACOTANC through a subscription.

Sample issues are available free of charge to any interested organization anywhere in the world, and will be sent to any group the reader recommends which may be interested. Please use the form enclosed or contact the Acotanc Secretariat at the address on page 2.

Suggestions on future content and offers of contributions would be most welcome.

*David Noël, Editor*

# **Big changes at ACOTANC — new industry council formed**

Major changes are underway with ACOTANC, the body which has been responsible for the Australasian Conferences on Tree and Nut Crops.

Until now, ACOTANC has been an informal group made up of representatives of various organizations already involved with tree and nut crops in Australia and New Zealand. These include the West Australian Nut & Crop Association, the New Zealand Tree Crops Association, the Australian Macadamia Society, and the Rare Fruits Council of Australia. They also include many other industry and research groups, in particular nut growers in southeast Australia who were mostly members of the former Victorian Nut Growers Association, but have

since reformed into the various professional grower associations going to make up the Australian Nut Industry Council.

Staging of particular ACOTANC conferences has been by informal arrangement between these various organizations, and usually involved one of them acting as host for a local staging in conjunction with other interested parties such as state Departments of Agriculture. The only continuing general representation ACOTANC has had, has been the ACOTANC Permanent Secretariat, operated

since 1988 on ACOTANC's behalf by the Tree Crops Centre in Perth.

The ACOTANC Permanent Secretariat has been funded by a grant from the ACOTANC-88 Committee, which ran the very successful 1988 ACOTANC in Lismore, northern New South Wales. Following discussions around the industry, on both sides of the Tasman, it was resolved to formally incorporate the ACOTANC structure and expand its role and influence in the region.

Incorporation has now been completed, under the name ACOTANC Inc. As well as the original meaning of this acronym, it will also be used to mean Australasian *Council* on Tree and Nut Crops. All organizations which were informally involved in ACOTANC previously, plus new ones involved in the area, are being invited to formally participate in the new ACOTANC Council. Council participants will all be organizations, individuals will only be involved in ACOTANC through membership of one of its participants.

It is the intention that ACOTANC Inc is a coordination and liaison body, open to any type of organization. Organizations may be incorporated or unincorporated, formal or informal, as for example: grower associations, research stations, university departments or laboratories, commercial firms, and agencies of government. ACOTANC's operation will be in the hands of individuals who are nominated by constituent organizations.

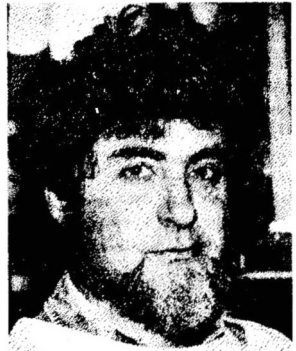
The Foundation President of ACOTANC Inc's Executive Committee will be Bill Taylor, and the Foundation Secretary will be Merv Richens. Both Mr Taylor and Mr Richens were previously in the equivalent positions in the ACOTANC-88 Committee, which has now been formalized and recast in its new role as ACOTANC Inc.

The funds of the ACOTANC-88 Committee, generated from the Lismore conference, have also been transferred to ACOTANC Inc. In the past, these funds have been used for two main purposes:

- to support later ACOTANC conferences, as through the funding of the ACOTANC Permanent Secretariat; and
- to build up and support a permanent Tree Crops Gene Bank in Lismore, in the form of a botanic garden of fruit, nut, and tree crop species and varieties.

In its expanded role, ACOTANC Inc will continue these activities, and add the following aims as well:

- to underwrite the funding of future ACOTANC conferences, through loans to future host organizations;
- to assist in the staging of these and other tree crops conferences, through provision of financial projection, topic development, editorial, publishing, and travel arrangement



*Bill Taylor,  
ACOTANC President*



*Merv Richens,  
ACOTANC Secretary*

services, as required by the hosts;

- to sponsor the publication of future editions of the Australasian Tree Crops Sourcebook (ATCROS), with the aim of improving it and developing it as a basic tool for participants and their members;

- to offer benefits and privileges to participants and their members in such areas as preferential rates at ACOTANC-supported conferences, preferential discounts on ACOTANC-supported publications, and the right to apply for ACOTANC-supported scholarships and fellowships.

Previous ACOTANC conferences have been in Perth ('82), Melbourne ('84), Auckland ('86), Lismore ('88), and Bay of Plenty ('92). The 1990 ACOTANC planned for Renmark was unfortunately cancelled. Under the new arrangements, the inter-conference period will be 3 years instead of 2, with the next staging being again at Lismore in 1995, followed by a New Zealand site (Hawke Bay) in 1998. The 2001 ACOTANC may be in Western Australia.

*Expressions of support or interest are being sought from all concerned. Let's hear from you!*

## Ships as fruit treatment plants

**A number of fruit importing countries, such as Japan, have stringent sanitary requirements on the entry of horticultural products.**

With citrus fruits, for example, Japan requires each carton to be cold-sterilized before entry. This involves keeping the fruit at a temperature of  $-0.6^{\circ}\text{C}$  for two weeks, and this temperature must be accurately maintained. If it reached a degree higher bacteria might not be destroyed, if it went lower the fruit might freeze and spoil.

Cold sterilization at the port of shipment is expensive, ties up cold storage facilities, and delays shipping dates. The South African citrus organization, Outspan, is investigating a new approach to this problem.

In the March 1993 issue of their publication *Citrus Journal*, Outspan describe a system being worked out for cold sterilization on board the ships being used to transport citrus from South Africa to Japan. Modern ships have been tested and approved for the system, and a feasibility presentation is being made to the Japanese quarantine authorities.

It is estimated that once approved, in-transit sterilization will extend the effective production season by six weeks for fruit bound for Japan, and enable higher volumes to be shipped.

With all perishable horticultural products, time spent in transit is essentially 'dead' time for the producer and recipient, during which the product is being financed but sale money cannot be gained. There may be other applications in which horticultural products can be processed in transit, giving a more rapid return on capital. **Y**

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## Book Review

***HORTICULTURE: Industry Commission Report No.29. Australian Government Publishing Service, Canberra, 1993. 416 pages. Paperback.***

This book is perhaps the most important and far-reaching document ever to impact on the Australian horticultural scene.

Produced by the Industry Commission (who may be described as the Australian Government's own management consultants or company doctors, set to work upon whole sectors of the Australian economy), this thorough and clinical analysis strips horticulture down to its chassis, engine, and coachwork and points out ways in which it could be put back together to work rather better.

It is my habit, when going through a book which contains points worth referring to later, to mark such points with 1-cm strips of Post-it sticking out, and a book with many such points may accumulate 5 or even 10 such strips by the time I have finished. Report 29 accumulated 56 such strips — far and away the record to date.

As there is no point in writing a review longer than the book reviewed, only a limited number of such specific points will be brought out here. On the overall picture, there is no doubt that the approach of the Commission staff was one of applying both basic principles and cutting logic in their recommendations.

Some of these principles, such as assuming *a priori* that future prosperity cannot lie in 'protected' industries, tariff barriers, cross-subsidization, and export subsidies, are by no means generally accepted in the land. So Report 29 can be expected to have a mixed reception by the horticultural community, and I suspect that it will only be

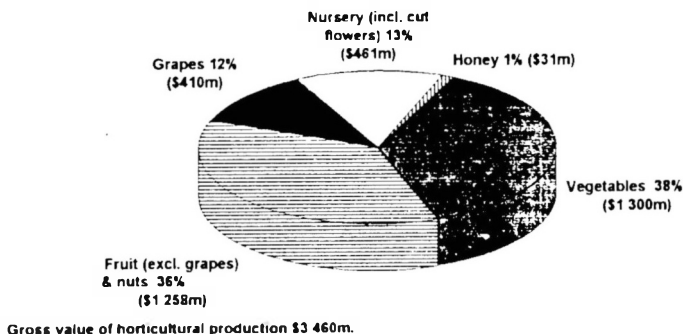
in retrospect that its value is fully appreciated.

The Commission carried through the work involved in producing the report by advertising the inquiry in the press, circulating parties likely to have an interest, calling for submissions from all interested, contacting some industry organizations directly, and holding a series of public enquiries in seven Australian cities. A draft report was produced and circulated to all involved, and further submissions and information were obtained before the final report was produced. Around 120 organizations took part in the process.

These organizations included the three major Australian Government organizations specifically concerned with horticulture, the Australian Horticultural Corporation (AHC — essentially concerned with promoting trade), the Horticultural Research and Development Corporation (HRDC — active in coordinating and part-funding industry research), and the Horticultural Policy Council (HPC — essentially a body drawn partly from the industry and intended to advise the Minister for Agriculture).

The Report does not dwell in great detail on the operation of these three bodies (later issues of *Acotanc Bulletin* are expected to cover this), except that the Commission was specifically assigned to assess the effectiveness of the AHC in increasing international competitiveness, and to report on this separately in advance of the main report.

Chart 1.2: Australian horticultural production, 1991-92, \$ million



Source: ABS 1992g (Cat. No. 7502.0, preliminary data)

Apart from ancillary matter, the final report is divided into three parts. Part A, *Overview, Findings, and Recommendations*, has eight sections on such matters as world markets for horticulture, Australian horticulture, production, transport, regulatory and assistance issues, and a summary of findings and recommendations.

Part B, *Description and Analysis of the Horticultural Sector*, forms the bulk of the book. It includes 7 sections, with the first four on production, trade and assistance, costs of production and distribution, domestic marketing, and export marketing. Two sections are specifically on the AHC and proposals for its reform, and one on other Australian Government institutions (including the HRDC and HPC).

Included in Part B are a mass of tables, charts, figures, and boxes illustrating industry aspects. This is followed by Part C, *Appendices*, which also contains a mass of statistics as well as lists of inquiry participants, and cameos on items such as taxation, social and environmental issues.

What you end up with is essentially the Commission's analysis and recommendations for the industry sector; the bulk of

the evidence assembled in that analysis; and a mass of data which can be used to great advantage quite outside the scope of the report.

To give the flavour of the report, here are just a few extracts:

• "It is not in Australia's best interest to retaliate against or imitate the protective trade barriers, export subsidies and unwarranted quarantine controls used by other countries to support their horticultural industries".

• "The Commission recommends that where a compulsory levy is paid by a horticultural industry, levy funds for programs requested by that industry be paid directly to that industry. There should be no obligation on the industry to engage the services of the AHC".

• "The Commission recommends that the taxation treatment of expenditure on new horticultural plantations be revised in a way which provides a more neutral treatment compared with expenditure on other activities". (Currently such expenditure is disadvantaged.)

• "ABARE gave evidence ... that the costs of producing fruit in Australia for the

manufacture of frozen concentrated orange juice may be up to 40 per cent higher than in Florida ... the reason for this difference is that the Australian citrus industry is well behind most other major citrus producing countries in the ... use of superior rootstocks, clones and varieties. This is largely the result of a 30 year quarantine based ban on the introduction of budwood ... ".

• "In Australia ... there were 21 full-time horticultural researchers employed in tertiary institutions, which implies that on average there were only 1.2 professional researchers per educational centre".

• "Many participants believe that the horticultural industries' main competitor in the labour market is the Commonwealth Government, through the social security system".

• "Mr Jervis of the Western Australian Fruitgrowers Association said that there is an abundant supply of foreign 'backpackers' or holiday workers ... however he reported a number of problems ... because of matters associated with visas and tax file numbers ... from time to time the Immigration

Department conducts raids on seasonal workers' workplaces and accommodation seeking out illegal workers or immigrants".

In summary, this is a most valuable report for anyone concerned with broad industry matters, and with how these broader issues affect particular operations or enterprises. While not quite at the 'Rambo-in-pinstripes' level, the Commission's report is certainly characterized by rationality and hard logic. It is also very much pitched on the straight economic approach.

Following on this report, the HPC has suggested the formation of 'Horticultural Task Forces' to tackle specific problems and issues, an approach used successfully in other agricultural industries such as sugar. The approach is intended to find *political* solutions, in conjunction with the *economic* solutions proposed by the Industry Commission. This seems a very worthwhile proposal.

**David Noël**

(Copies of this report and other relevant reports are available from the Tree Crops Centre — see the Granny Smith's Bookshop advertisement on page 19)

## New Edition of ATCROS

Work has begun on a New Edition of ATCROS, the Australasian Tree Crops Sourcebook.

The First Edition of ATCROS was published by Cornucopia Press for the West Australian Nut & Tree Crop Association Inc. in 1991. Arrangements have been made so that the Second Edition of ATCROS will be sponsored by ACOTANC and will be available to Participants at very favourable rates. The new edition is due out in 1994.

The contents of the first edition of ATCROS are shown in the box. All the wealth of data it contains is included in series of tables. For the first section of the book, these tables include information on all sorts of fruits, nuts, and other tree crops, and branch and membership information for leading Australasian tree crop organizations. The second section comprises a comprehensive Directory of suppliers of plants, information, organizations and services within Australasia, and a selection of relevant contacts outside it.

**75% discount for Full Participants**

In the 1994 ATCROS, all the information



included will be updated and extra information added. ACOTANC are keen that Full Participants offer ATCROS to their constituent members as a **membership benefit**, that is, they set their individual fee schedules so that their members automatically get a copy of ATCROS with their own organization's publications.

The new edition of ATCROS will be published by Cornucopia Press for ACOTANC at a cover price of \$10 Australian per copy. Full Participants in ACOTANC can place a pre-publication order for one copy of ATCROS for each of their members at only **\$2.50** per copy. This huge discount means that their members can be provided with a

substantial benefit, probably within their existing fee structure, as the charge essentially covers only the incremental cost of printing extra copies.

### Bold Type in Directory

The ATCROS Directory Tables are set to become the principal reference source for people looking for supplies of trees, plants, publications, consulting services, and educational courses relating to tree crops. Entry of directory names in bold type represents a significant advantage for such suppliers.

In the 1994 ATCROS, individual members of Full Participants (say a nursery which is a member of the WA Nut & Tree Crop Association, or a harvesting equipment manufacturer which is a member of the North Coast Horticultural Council) can claim to have their directory entry in bold type without any charge. Entries in the ATCROS Directory are free, but the only way to have an entry name printed in bold type is to be a member of an ACOTANC Full Participant.

### Participant Membership Lists

It can be expensive for an organization to produce a full list of its members and publish this as a separate publication. ATCROS will offer the option to Full Participants to print their current membership lists in ATCROS. Not all Participants will wish to do this, but those who do will find that their listed members receive many useful offers from suppliers and others who have something to offer in their special fields of interest.

Further details and conditions on special ATCROS facilities for ACOTANC Full Participants can be obtained by contacting the Acotanc Permanent Secretariat at the Tree Crops Centre (see page 2).

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## THE BIG SCRUB BOTANIC GARDENS

During August 1988 the ACOTANC-88 Conference was held in Lismore, Northern NSW, with a focus on Australasian Horticulture for the World. The keynote speaker was Dr Bob Knight from the USDA in Miami.

In summing up, Dr Knight highlighted the dangers to our horticultural productivity, locally and globally, by the clearing of tropical and subtropical rainforests.

The global warming effects of this destruction are well documented, but just as serious is the loss of germplasms, particularly

the ACOTANC-88 Fund was formed and administered initially as a subcommittee of the Exotic Fruit Growers Association Ltd. This fund was constituted with the principle aim of establishing a tropical/sub-tropical fruit and nut gene repository in Australia using funds that resulted from ACOTANC-88's modest financial success.

ACOTANC is now incorporated and administers the fund to support the Botanic Gardens, as well as provide loans to organisations to conduct the triennial ACOTANCs.

A suitable site for the Botanic Gardens was sought with the conditions that it be accessible to the public, and remain secure from private ownership which might threaten its long term survival.

Summerland House With No Steps (SWHNS) (a member of the Wheel

Chair Association) was approached and have made available a considerable portion of land.

SWHNS see great tourist potential for the Gardens to complement the Tea Rooms and retail nursery already operating on the site. ACOTANC have proceeded with landscape designs and some preliminary site improvement, and have produced an establishment/operating budget.



*Alstonville Tropical Fruit Research Station farm manager, John Dirou, ACOTANC chairman Bill Taylor, horticulturist Mike Delaney, and regional director of the House With No Steps, Rick Behrens, examine the fruits of their labour.*

those related to our current commercial horticultural crops and our potential commercial crops. The loss of these species means loss of genetic material which may be useful for introducing disease resistance, tolerances to climate change and so on — these concepts are not new and are well recognised.

As a response to Dr Knight's comments,

Mr Brett Robinson from NSW Agriculture commenced a project entitled *Collection and Investigation of Australian Plants With Food Crop Potential (Bush Tucker)* with matching funding from the ACOTANC-88 Fund and the Horticultural Research & Development Corporation (HRDC) at NSW Agriculture's Alstonville Tropical Fruit Station.

Shortly afterwards Mr Robinson was transferred, so Mr Mike Delaney, who was employed as a casual assistant with the grant money, proceeded to relocate the Bush Tucker planting to SHWNS to be

incorporated in the Gardens. The grant has now concluded and Mr Delaney's efforts have resulted in the establishment of 36 different species, totalling 384 trees and shrubs. An area has been set aside for exotic species from overseas countries as well as an area to be established as a local native rainforest.

ACOTANC Inc is seeking further individual, industry, and government funding to support this gene repository for endangered species and the Big Scrub Botanic Gardens.

*For further information contact Bill Taylor or Merv Richens, PO Box 91, Lismore Heights, NSW 2480, Australia.*

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## Where is Australasia?

**Most people know that Australasia is the bit at the bottom right-hand corner of most World maps — more or less Australia plus a few of the islands near it. But its exact limits are seldom defined.**

ACOTANC Inc has adopted a fairly precise definition of 'Australasia', in terms of the area within which cooperating organizations can take up Full-Participant or Local-Affiliate status within ACOTANC. The ACOTANC Zone includes Australia, New Zealand, Papua New Guinea, and all countries with at least 10 percent of their territory on islands of the South Pacific or on islands off the south, southeast, or east coasts of mainland Asia.

This definition certainly includes Indonesia, Malaysia, Philippines, and the many small nations of Micronesia and Melanesia, such as Fiji and Kiribati. At the limits of the Zone are Japan to the north, Ceylon to the west, and French Polynesia to the east.

It is perhaps inevitable that the initial operations of ACOTANC will be largely concentrated within Australia and New Zealand. Nevertheless, we look forward to increasing participation of the closer island

neighbours as the years go on. There is nothing to prevent future ACOTANC Conferences being held in the Philippines, Sabah, or Bali, and such a development would be both valuable and welcomed.

Within the ACOTANC Zone there exists simultaneously both one of the great plant gene-plasm resources in terms of native perennial plants, and a developed and developing scientific community able to work with world plant resources for human use in a sensitive, sustainable manner.

At a world Plant Breeders' conference I once attended, one delegate made an impassioned plea. "We have to work together", he said. "There are so few of us." And he was right. ACOTANC's aim is both for increasing and closer cooperation within the Zone, and for full exchange of information and people with our valued Out-Zone Associates throughout the world. That way, we can do our best for ourselves and the rest of the planet.

## Australian Macadamia Industry Focus

**The Australian macadamia industry appears poised for a major further expansion with prospects for a prosperous future.**

In 1991 Australian macadamia production amounted to approximately 9000 tonnes nut-in-shell, with an on-farm value around A\$27 million (about US\$18m). Production was divided almost evenly between Queensland and New South Wales, currently the only significant producers.

Australia is the world's second largest macadamia producer, after Hawaii, and is expected to become world leader by 1995. Other significant producers are Kenya, Malawi, Zimbabwe, South Africa, and Central American countries, while test planting has occurred in Brazil.

There are between seven and eight hundred growers and twelve processors in Australia. Approximately 80% of the crop, with a value of \$50m, is exported, with over 90% going to the US. Other export markets include Japan, SE Asia, Canada, and Europe.

Most exports are in bulk form.

The industry has pulled through a period of uncertainty and a certain amount of gloom. It is believed that this dark time was, in fact, partly generated by the industry's own success. Over the 5 years before 1991, macadamia production more than quadrupled in value, from around A\$5 million to about \$22m. In effect, macadamia growers did not have the mechanisms in place to handle the tonnages produced, and were caught short by their own success. The general world recession was also a factor.

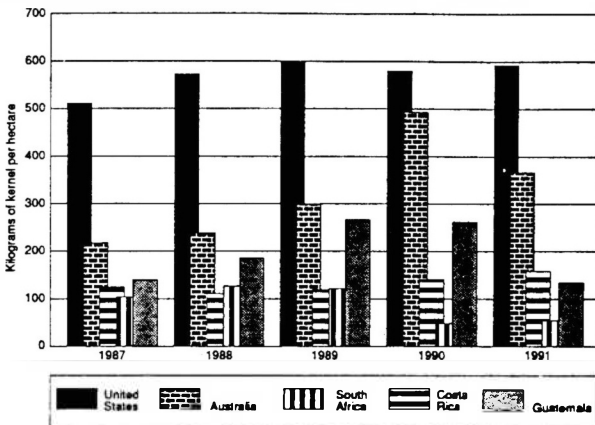
Now the mood is very buoyant. Macadamia processors have complained that they "just cannot get enough nuts to meet the demand". Andy Stapleton, President of the Australian Macadamia Society, comments that "the most visible thing happening at the moment is the huge number of buyers waiting

for the crop to fill. May they all continue to fall short of their needs for many years to come, and may we continue to make a profit at each level of the industry!"

The Australian Macadamia Society have been one of the most successful users of the statutory levy system, turning over sums of around a quarter of a million dollars each year for promotion and research, from a levy of 3 cents per kilogram.

Of this 3-cent levy, 2 cents went to the Australian

Figure 1-6  
Macadamia nuts: Raw kernel production per hectare, by major producers, 1987-91



Source: USITC Publication 2573

Horticultural Corporation for promotion work, and 1 cent to the Horticultural Research & Development Corporation for research. As from 1993, the AMS have resolved to raise this levy to 4 cents, split equally between the two purposes.

This increase in research money does make sense — promotion funds tend to pit one's product against other competing products from the same area, causing a perhaps temporary shift in a fixed market share. Research leading to greater production efficiency can create new and bigger markets.

The important event from overseas was the release of the United States International Trade Commission Report *Macadamia Nuts: Economic and Competitive Factors Affecting the U.S. Industry*. As the Australian industry is growing greatly in size and treading on the

heels of the US producers, who are restricted on expansion in Hawaii by the lack of available land, it was feared that the investigation could lead to US "anti-dumping" tariffs.

In the event, the report has been received in Australia with some relief. The trend of the USITC report was along the lines that there had been some technical dumping by Australian producers, that it was inadvertent, and that US producers had not been significantly damaged. No punitive tariff was recommended.

The American report (USITC Publication 2573) is a valuable document in its own right, containing a wealth of information on macadamia industry production and practices worldwide. Copies will be available from the Tree Crops Centre for those interested. ¥

## Work underway on ACOTANC-95

**Work has begun on ACOTANC-95, the next Australasian Conference On Tree And Nut Crops. It will be held in Lismore, New South Wales, in mid-September 1995.**

**This Conference is the first to be held under the aegis of ACOTANC Inc, the newly-reconstituted umbrella body for organizations involved in the production of crops from perennial plants. Previous ACOTANCs were hosted by local groups who cooperated in the former, unincorporated ACOTANC grouping.**

**The First Announcement and the Call For Papers is going out simultaneously with this issue of ACOTANC Bulletin.**

**This is also the first ACOTANC which re-visits the site of a previous staging. Lismore was the site of ACOTANC-88, hosting one of the most successful and popular conferences in this series to date. One reason for its popularity was its setting in the heart of the northern New South Wales/ southern Queensland tropical fruit production zone, with its proximity to rainforests and beaches and its easy transport access.**

**To find out more, use the form with this issue of ACOTANC Bulletin or contact The Conference Secretary, ACOTANC-95 at PO Box 91, Lismore Heights, NSW 2480, Australia (Phone: (066)-24 3211 • Fax: (066)-24 1007).**

# Why your organization should subscribe to ACOTANC

*If your organization has interest in the use, conservation, and ecology of perennial plant species, for production of fruits, nuts, spices, animal fodder, beverages, pharmaceuticals, industrial and construction materials, or other bioproducts, you will find it to your advantage to subscribe to ACOTANC.*

## Your organization will get:

- A contact route to enhance its particular interests, through interaction with other participants;

- An information route, through receipt of and contribution to *Acotanc Bulletin*;

- An improved public profile and potential increased membership through exposure within *Acotanc Bulletin* and *ATCROS*, the *Australasian Tree Crops Sourcebook*.

## Your organization's members will get:

- Benefits from preferential rates for attendance at ACOTANC-supported conferences;

- Benefits from preferential rates for supply of *ATCROS* and other ACOTANC publications;

- Eligibility to apply for ACOTANC-supported scholarships and fellowships;

- Benefit from *Acotanc Bulletin* articles which can be reprinted in your own publications;

- Eligibility to apply for free bold-

type entries in *ATCROS* for commercial services they provide.

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Please see *ACOTANC Organization, Involvement, & Classes* (page 18) for details of participant level and the Acotanc Zone.

**Please use the form with this issue of *Acotanc Bulletin*, or contact the Acotanc Permanent Secretariat, PO Box 27, Subiaco, WA 6008, Australia (Phone 09-381 3400; Fax 09-381 1612).**

# New horticultural statistics book out

A useful small statistical handbook has been produced by the Australian Horticultural Corporation.

Called the *Australian Horticultural Statistical Handbook*, this 36-page booklet has production figures, sketch maps of main production areas, and in some cases lists of major competitors, export markets, and comments for 18 of the more important fruit and nut crops.

The publication covers Apples, Avocados, Bananas, Berries, Chestnuts, Citrus, Custard Apples, Cut flowers, Grapes (fresh), Honey, Kiwifruit, Macadamias, Mangos, Melons, Nashi, Pears, Pineapples, and Stonefruit.

For some fruits, such as Apples, useful charts are given for varieties and availability times for Australia and its main competitors.

The AHC note that the statistics are the most recent and accurate available, and that they intend to regularly update the publication.

Copies are available free from the AHC, or from the Tree Crops Centre for a handling charge (see Granny Smith advert on page 19).

## CHESTNUTS



### AUSTRALIAN CHESTNUT PRODUCTION BY STATES (TONNES)

YEAR	NSW	VIC	QLD	WA	SA	TAS	AUSTRALIA
1991	35	400	—	55	10	—	500
2001(F)							3,500

### AVAILABILITY, MAJOR COMPETITORS AND MAJOR MARKETS

The main Australian season is from late March to May with supplies from Controlled Atmosphere storage available in June and the main consumers are European immigrants especially of Italian or Greek extraction. The main consumers are Europe, where the season is from October to December and Japan, where the season is from August to March with 90% being consumed in September/October. Northern hemisphere production is over half a million tonnes, one of the highest of all nuts with the leading producers being China, Italy, Turkey, Japan and Korea. Southern hemisphere production is considerably less with Bolivia, Brazil, Chile and Argentina the leading producers. Japan is the leading consumer, importing a significant volume from China.

Although Australian production is expected to rapidly increase in the next few years, this is not expected to have a significant impact on price. Little or no market research has been conducted and a potential market may exist in New Zealand.

# The New Zealand Scene

Government involvement in horticulture in New Zealand has been undergoing a prolonged period of re-structuring and reorganization.

The main thrust has been the dismantling, decentralization, or selling-off (privatization) of many government research and regulatory organizations. Ten years ago, the principal New Zealand Government organizations concerned with horticulture were MAF (the Ministry of Agriculture & Fisheries, jocularly known as the MAFia), and certain Divisions of DSIR, the Department of Scientific & Industrial Research. As New Zealand does not have a federal structure, it did not have any equivalents to the State government organizations in Australia.

In DSIR, one of the main tree crop research centres was at the Division of Crop Research at Lincoln, near Christchurch in the South Island. This, or perhaps parts of it, seem to have gone first to Division of Landcare Research, then to just plain Landcare Research New Zealand, and at present is represented in the New Zealand Institute for Crop & Food Research Limited, obviously set up as a commercial (if government-owned) company.

The banner under which matters have been going forward (sideways?; backward?) has been "*The User Pays*". This trend has really been pursued almost to the ultimate. As an example, if you are a rural dweller, you have to pay extra to have your mail delivered to your house; the normal postal fees only pay the mail to the nearest post office. In the horticultural area, this has meant that free extension services and helpful leaflets are a thing of the past, and if you have an orchard problem, the local government institute will be pleased to quote you their consultancy fee for looking at it.

As an outsider, my impression has been that some of the staff who have been notionally translated from a typical government-monopoly position to a supposedly private-enterprise equivalent may have had adjustment problems. There may have been a tendency to offer government-level services (previously free or cheap, but take it or leave it) at private-enterprise prices (costly but effective). *The problem with User Pays for a government-funded service open to competition is that the User may, or probably will, decide not to pay at all.*

As in other countries, the education side has seen a change from benevolent-parent attitude to one of making kids pay their own way. The government-funded Lincoln College of Agriculture has become Lincoln University, and Universities are encouraged to "seek private support for funding". Research in such areas as horticulture continues, but funds for research, especially basic research with no immediate pay-back prospects, are definitely harder to come by.

What this has meant for the grower of fruits, nuts, and other tree crops is that the burden of most research and development work has been thrown back on grower associations and producer cooperatives. The latter do have some cash flow to tithe for research, promotion, and development, but a general-purpose membership organization like the New Zealand Tree Crops Association must rely on income sources such as membership subscriptions to fund research. Such membership fees are quite insignificant compared to earlier sources — often



inadequate to fund even a member of office staff, let alone a professional research scientist —and under New Zealand's all-embracing Goods & Services Tax, even these membership subscriptions are subject to GST.

There have been signs that the New Zealand economy is getting back on the rails, and of course if it is happening, this is very

welcome. An apprehension is that in so doing, New Zealand has jettisoned much of its background research base. Such a loss may have no immediate effect, but half a generation or so on, will this still be true? Will the New Zealanders of 2013 take kindly to their principal status, as a pretty and cheap holiday spot for their affluent South-east Asian neighbours? **Y**

Table 1.4: **The real value of Australian production of fruit, nuts and vegetables, 1979-80 and 1980-81 average, 1989-90 and 1990-91 average, constant \$ million (1990-91 dollars)<sup>ab</sup>**

Product	Average of 1979-80 to 1980-81	Average of 1989-90 to 1990-91	Change over ten years
	\$ million	\$ million	per cent
Bananas	112	211	89
Wine grapes	175	208	19
Apples	241	200	-17
Oranges	175	173	-1
Stonefruit	136	141	4
Drying grapes	229	117	-49
Pears <sup>b</sup>	83	83	0
Table grapes	35	58	63
Mandarins	25	40	64
Pineapples	43	40	-7
Strawberries	19	29	48
Avocados	nss <sup>c</sup>	26	nss <sup>c</sup>
Macadamias	6	21	277
Mangoes	3	20	521
Almonds	9	16	82
Lemons/limes	18	13	-26
Other citrus	16	11	-33
Other fruit, nuts	38 <sup>d</sup>	32	53 <sup>d</sup>
<b>Total fruit and nuts</b>	<b>1362</b>	<b>1438</b>	<b>6</b>
Potatoes	315	391	24
Tomatoes	148	180	21
Onions	74	84	13
Carrots	51	74	45
Mushrooms	38	88	132
Lettuce	47	60	28
Other vegetables	294	449	53
<b>All vegetables</b>	<b>962</b>	<b>1325</b>	<b>37</b>
<b>Total fruit, nuts, and vegetables</b>	<b>2329</b>	<b>2763</b>	<b>19</b>

na Not available.

a Values have been rounded to the nearest whole unit. Totals may not add due to rounding.

b Values converted to \$1990-91 using Australian Bureau of Statistics price deflators for gross domestic product.

c Not specified separately. Included in 'other fruits, nuts' category.

d Including avocados.

Sources: ABARE 1992a, pp. 71-73; ABS 1992h (Cat. No. 7503.0), p.11; ABS 1992b (Cat. No. 5206.0), and previous issues.

(Reproduced from Industry Commission Report No. 29)

# ACOTANC Inc

## (Australasian Council On Tree And Nut Crops)

### Organization Involvement & Classes

ACOTANC is a coordination and liaison body, for which involvement is open to any type of organization. Organizations may be incorporated or unincorporated, formal or informal, as for example: grower associations, research stations, university departments or laboratories, commercial firms, and agencies of government.

Operation of ACOTANC will be in the hands of individuals who are nominated by constituent organizations.

There will be 3 classes of organization involvement.

#### 1) Full Participants.

Full Participants will consist of organizations who support the Council's aims and wish to have rights of voting and participation in the operation of the Council. Each Participant should have a minimum of 50% of its individual members within the ACOTANC Zone.

Each Participant will have equal and full rights to Council privileges and services, such as the right to apply for grants and services in the staging of conferences or the pursuit of research, the right to be represented in publications produced for the Council, and the right to nominate representatives to sit on the Council or on its Executive Committees.

Individual members of any Full

Participant will have full rights to relevant ACOTANC privileges, such as preferential rates at ACOTANC-supported conferences, preferential discounts on ACOTANC-supported publications, and the right to apply for ACOTANC-supported scholarships and fellowships.

#### 2) Local Affiliates

Local Affiliates will consist of organizations within the ACOTANC Zone who are interested in the Council's aims and wish to be kept informed of its activities and of activities generally in the area of tree and nut crops.

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### 3) Out-Zone Associates

Out-Zone Associates will consist of organizations outside the ACOTANC Zone who are interested in the Council's aims and wish to be kept informed of its activities and of activities generally in the area of tree and nut crops.

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### ACOTANC Zone Definition

The ACOTANC Zone includes Australia, New Zealand, Papua New Guinea, and all countries with at least 10 percent of their territory on islands of the South Pacific or islands off the south, southeast, or east coasts of mainland Asia.

Y

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681A • AUSTRALIAN Horticultural STATISTICS Handbook (Aus, 1993). 36p. Pb. Useful little AHC booklet with production figures & area maps for major fruits, nuts. \$2.00§

654H • HORTICULTURE: Industry Commission Report 29 (Aus, 1993). 431p. Pb. Irresistibly competent, far-ranging review and future blueprint for all of Australian horticulture. Essential for industry perspectives and economics, packed with data. \$27.95

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653N • NEW HORTICULTURAL Opportunities for Northern Australia: 2nd National Horticultural Symposium, Camarvon (WA, 1993). 286p. Spiral. Valuable reference, 38 papers on upcoming subtropical fruits, esp. mango, banana, low-chill stonefruit, also date, table grapes, cashew, jojoba, strawberry, review of export markets etc. Recommended \$24.95

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# ACOTANC-95

*Australasian Conference On Tree  
And Nut Crops*

Lismore, New South Wales, Australia

Mid-September 1995



## First Announcement & Call For Papers

Expressions of interest in attending and/or presenting a paper or poster at the next Australasian Conference On Tree And Nut Crops are sought from all involved in useful perennial crops.

The Conference will embrace a wide range of topics and every sort of climatic and environmental growing conditions. Both established and potential new or

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The Conference will be held in Lismore, northern New South Wales, in the heart of Australia's principal subtropical fruit and nut production region.

Some limited assistance in attending may be available for certain contributors.

Please complete the form with this issue of Acotanc Bulletin or contact:

**Conference Secretary, ACOTANC-95, PO Box 91, Lismore Heights, NSW 2480, Australia (Phone: (066)-24 3211 • Fax: (066)-24 1007).**

## Participation of Your Organization in ACOTANC

If your organization has interest in the use, conservation, and ecology of perennial plant species, for production of fruits, nuts, spices, animal fodder, beverages, pharmaceuticals, industrial and construction materials, and other bioproducts, you will find it to your advantage to subscribe to ACOTANC.

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Details of participation benefits, classes of participation, and the Acotanc Zone are included in this issue of Acotanc Bulletin or will be supplied on request.

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