

Apple & Pear Industry Data and Analysis

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Project Number: AP08055

AP08055

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Apple & Pear Australia



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Apple and Pear Industry Data and Analysis

Horticulture Australia Project Number: AP08055

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Purpose

This report is the Final Report of the project known as AP08055 " Apple and Pear Industry Data & Analysis"

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30 September 2011

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1. Executive Summary

This project aimed to provide accurate and timely information about the size and nature of the apple and pear industry, particularly with respect to production, grower numbers and location, and cool store stocks.

It was envisaged that the Australian Bureau of Statistics would carry out much of this work. Information gathered was to include production by variety, numbers of trees by variety and age, area planted by crop type, numbers of growers and volume of cool storage. Each item was to be gathered by state, by statistical division and by statistical subdivision.

APAL was advised that the ABS now was seeking near full cost recovery for collecting and publishing the data. As a result, the cost of providing the data had risen to 3 times the original cost. APAL was unable to proceed with the project as originally planned.

In response, APAL enlisted the assistance of the 6 state associations to carry out its own collection of the apple and pear 2009 statistics. Unfortunately the response rate was very low and the data collected was not usable in statistical terms.

APAL has entered into detailed discussions with ABS to ascertain ways in which the costs of conducting the survey can be reduced. The possibility of collaborating with similar horticultural industries to spread the fixed costs of a survey also continues to be investigated. APAL commissioned ABS to supply grower diversity data to assist in this regard. The data has been analysed but not yet disseminated.

This Project was also used to collect data from the Melbourne Wholesale markets. The data set has been used by the Centre for International Economics (CIE) in modelling work associated with AP10030 Adjusting to Apple Imports Economic Impact Statement.

APAL also appointed a permanent part-time administrative assistant who has undertaken the task of ensuring the grower database is accurate and up-to-date. The data base acts as a proxy for apple and pear levy payers and is used in the dissemination of R&D outcomes and other information that is vital for rational business decision-making by growers.

Disseminating information about cool store stocks has been an activity of APAL for some time. In 2011, the preparation of the stock report was changed from a largely manual system to an online version where the cool stores were able to insert their data into an online form which is emailed directly to a data base processing centre. This was introduced in February 2011 and to distinguish the new system from the old, the system is now called InfoPome.

2. Introduction

This project covers the industry's need to have accurate and timely information about itself. Production and wholesale price information, information about growers, information about what volumes of product are held in stock and information about the forthcoming crop are essential tools for rational business decision making across the supply chain.

Growers for example, use this information to make informed decisions about new plantings, harvest labour requirements, storage facilities and capital investment in machinery. The information is also used in marketing decisions.

The information is also critical to government and grower organisations such as APAL, as well as Horticulture Australia Limited. APAL uses the information to determine industry dynamics and trends and to disseminate information to growers as a proxy for levy payers. HAL uses the information to assist in investment planning to meet the changing R&D and marketing needs of growers. Governments use the information to assist in policy and regulatory determinations.

The main focus of the project was to use the Australian Bureau of Statistics agricultural census and survey gathering methods to collect production information. Information gathered was to include production by variety, numbers of trees by variety and age, area planted by crop type, numbers of growers and volume of cool storage. Each item was to be gathered by state, by statistical division and by statistical subdivision. In the past the ABS had prepared a survey of Australian apple and pear growers, collecting this information on an annual basis on behalf of the apple and pear industry. Once collected and verified APAL was then to analyse the information and prepared it for publication.

Contact information about growers was also to be updated and included in the APAL database using the services of a specialist office temporary employee. The APAL database is a valuable and precious resource, used as a means of disseminating information to apple and pear levy payers. On-going maintenance of the database is essential to ensure that the outcomes of R&D investment and knowledge about how the levies are spent are directed to the relevant industry participants.

The system for collecting and interpreting cool store stocks data has been refined by APAL over a number of years. This activity is managed by an APAL staff member. These published figures are the most closely scrutinised in the industry. The Cool Store Stocks Report is regarded as being highly accurate and very useful by the industry in general. This project requires that the cool store stock activity continues, with monthly surveys of a sample of cool stores throughout Australia. The project also requires that there is

interpretation of the data followed by distribution of the results. It is an activity that requires significant resource inputs.

Lack of crop forecasting has been a major shortcoming in the apple and pear industry for many years. There has been a recent push by APAL's Board and the Apple & Pear IAC to establish a methodology for crop forecasting. This project sought to provide pre-development and planning activities which would enable a dedicated crop forecasting project to commence.

3. Project Methodology

This project aimed to provide accurate and timely information about the size and nature of the apple and pear industry, particularly with respect to crop plantings and production, grower numbers and location, and cool store stocks.

3.1 ABS crop production data: analysis, verification and dissemination

The first part of this project was aimed at providing detailed historical information about crop production. It was envisaged that the Australian Bureau of Statistics would carry out this work on a sub-contract basis. Information gathered was to include production by variety, numbers of trees by variety and age, area planted by crop type, numbers of growers and volume of cool storage. Each item was to be gathered by state, by statistical division and by statistical subdivision.

In the past the ABS had prepared a survey of Australian apple and pear growers to collect this information on an annual basis on behalf of the apple and pear industry. Some of the results from the ABS survey were published (Catalogue 7121.0.55.002 - Agricultural Survey, Apples and Pears, Australia, 2007-08) on the ABS website at:

<http://www.abs.gov.au/AUSSTATS/abs@.nsf/productsbyCatalogue/3D5E98B22C97E16ECA256E620076EF4C>

It was expected that a production survey would pose no issues for the industry. Growers had been completing the ABS census forms every year for many years and view the task as part of an annual cycle. Growers expected to benefit both directly and indirectly from the collection of such information. Direct benefits included the availability of planting and tree data that could be used as a business planning tool and the availability of production data to chart the progress of the industry. Growers expected to benefit indirectly from the enhanced planning ability that organisations such as HAL, APAL, PHA and state and federal governments obtain from having access to such comprehensive industry data.

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In addition to data collection, this project included components to verify the accuracy of the ABS data as well as analysis and dissemination to make the data accessible to growers and the supply chain. This was to be done by i) comparing the data against other data sources for a reality check and ii) analysing the data and publishing it in a series of easy to understand tables and graphs on the APAL website. This work was to be carried out by APAL employees as part of their regular work duties.

In line with the project objectives APAL sought, via telephone and by written communication, the services of ABS to conduct the survey for the 2008-2009 period. APAL was advised that the ABS now was seeking near full cost recovery for collecting and publishing the data. As a result, the cost of providing the data had risen to 3 times the original cost. APAL was unable to proceed with the project as originally planned.

In response, APAL enlisted the assistance of the 6 state associations to carry out its own collection of the apple and pear 2009 statistics. Collection was carried out by each of the State Associations using a form (similar to the ABS) designed and prepared by APAL staff. Each State Association was contracted (to a total of \$50,000) to complete this task, mailing the form to members of their databases. A copy of the collection form prepared by APAL is attached.

The APAL-State organisation survey attracted a very poor response rate – at approximately only 30% of the response the ABS had achieved in earlier surveys. A summary of the collected data is attached. Unfortunately, because the response was too low, the data collected for the 2009 season was not usable in statistical terms.

APAL believes that the poor response rate achieved reflects a general mistrust by growers - that the collection agency (the State organisations and APAL) is not truly independent in the way that the ABS is. Moreover, anecdotal evidence suggests that growers perceive that the ABS acts with the authority of government and that the survey is “compulsory”.

Access to accurate and detailed data remains important. With imports from both China and New Zealand now a reality it is critical that growers be provided industry data to enable them to make rational business decisions.

APAL has entered into detailed discussions with ABS to ascertain ways in which the costs of conducting the survey can be reduced. The cost of a reduced scope of content continues to be assessed, particularly with regard to reducing the number of varieties considered and the number of growers surveyed. The possibility of collaborating with similar horticultural industries to spread the fixed costs of a survey also continues to be investigated.

3.2 Grower Diversity Data

The possibility of incorporating other temperate tree fruits into the production survey would require a better understanding of the make-up of fruit growers. Up until recently the industry did not know how many apple growers or how many pear growers also produce other fruits such as cherries, summer-fruit and nashi pears. To overcome this problem APAL purchased an initial data set from the ABS based on their 2009 agricultural survey of production and number of establishments. This data set indicated that a large majority of growers grow more than three fruit types. Consequently a further data set was purchased to enable a better understanding of industry dynamics.

3.3 Melbourne Wholesale Market Prices

The Project was also used to collect data from the Melbourne Wholesale markets. Initially the data set for a three year period ending June 2010 was provided to the Centre for International Economics (CIE) for use in AP10030 Adjusting to Apple Imports Economic Impact Statement. The data enabled the CIE to update the apple and pear module of *Hi_Link* model so that the impact of imported fruit could be established.

The Project also purchased an update of that data through to the end of August 2011. The data is monthly and by variety of apple (Braeburn, Firm Gold, Fuji, Golden Delicious, Granny Smith, Jonogold, Jonathans, Pink Lady, Red delicious, Royal Gala and Sundowner) and by variety of pear (B. Bosc, Corella, Claps Fav, Crystal, Honey, Josephine, D'anjo, Packham, Paradise, Red D'Anjo, Red Sensation and Williams). The price series provides the best price, average price and the high and low price.

This data is yet to be analysed but is intended to be graphed for growers to illustrate price trends generally, the price differential between varieties and, if possible, the price differential between grades.

3.4 Grower database

A separate part of the project aimed to provide APAL with up-to-date information about the contact details of apple and pear growers to ensure that materials relevant to levy payers could be forwarded to the appropriate address. Initially this was done by employing temporary administrative assistants to update the APAL grower database. Temporary assistants were employed for a period of about three months and supervision was carried out by APAL personnel as part of their regular work duties.

The use of temporary contractors resulted in inconsistencies and a disjointed effort. APAL subsequently appointed a permanent part-time administrative assistant who has undertaken the task of ensuring the database is accurate and up-to-date.

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Grower details are recorded into an Excel Master data base spreadsheet including name, address, and, where possible, email and telephone details.

As part of the process of continuously up-dating the grower database, the APAL Administrative Officer contacts growers by telephone if copies of the Australian Fruitgrower Magazine (project MTO8043) are returned to the office as undelivered mail. Confirmation is sought that the entity or grower is no longer an apple and or pear grower or that contact details have changed. On average five magazines are returned per month.

3.5 Cool Store Stocks

Another component of this project sought to provide timely and accurate information regarding stock levels of apples and pears. Gathering, interpreting and disseminating information about cool store stocks has been an activity of APAL for some time and is carried out by APAL personnel as part of their regular duties.

Broadly the methodology involved identifying participants, gathering data on a monthly basis, interpreting and manipulating the data to provide coherent information and disseminating the information.

In 2011, the preparation of the stock report was changed from a largely manual system to an online version where the cool stores were able to insert their data into an online form which is emailed directly to a data base processing centre. This was introduced in February 2011 and to distinguish the new system from the old, the system is now called InfoPome.

3.6 Crop Forecasting

The final part of the project aimed to provide the apple and pear industry with a reliable on-going method for crop forecasting. It was envisaged that this work would determine the type and level of empirical data that could be gathered to provide inputs for a statistical model that might be built as part of an improved crop forecasting module for the Apple & Pear Industry.

The preliminary support activity that was to be carried as part of this project was based on the assumption that the aforementioned ABS data would be available. As the ABS data was not available, the activity that was to be carried out by an APAL employee, could not be undertaken. Therefore the project AP 08038 Improved Crop Forecasting in the Apple & Pear Industry was not able to proceed and the project was not completed.

4. Project Achievements and Outputs

4.1 ABS data analysis, verification and dissemination

Due to a rise in the cost of providing the collection by ABS (in the order of 3 times the original cost) APAL was unable to proceed with the project as originally planned. The outputs:

- Receipt;
- Verification;
- Analysis; and,
- Dissemination

of data has been partially achieved.

APAL has entered into detailed discussions with ABS to ascertain ways in which the costs of conducting the survey can be reduced. The possibility of collaborating with similar horticultural industries to spread the fixed costs of a survey are being investigated.

4.2 Grower Diversity Data

APAL purchased grower diversity data sets from the ABS based on their 2009 agricultural survey of production and number of establishments. The data sets were analysed on a State basis, except for New South Wales and Victoria which were broken down into relevant statistical divisions (to separate Batlow from Orange and the Yarra Valley from the Goulburn Valley). The analysis was undertaken by the Department of Agriculture in Victoria (DPIV). They offered services free of charge as this information was also of particular interest to their portfolio.

The analysis, a summary of which is provided in Box 1, provides a good case for working with both the cherry and summerfruit industries to collaborate on data collection. The analysis provided by Vic DPI will be disseminated to growers and to the relevant peak industry bodies.

4.3 Melbourne Wholesale Market Prices

The Centre for International Economics (CIE) used the price data set to update the apple and pear module of Hi_Link model employed in AP10030 (Adjusting to Apple Imports Economic Impact Statement). This work assumed that the Melbourne whole market prices were indicative of Australian wholesale prices generally. The data enabled the CIE to confirm that the immediate impact of the introduction of import competition resulting from relaxing quarantine restrictions would be to lower the domestic price. The CIE the used the Hi_Link model to estimate the various adjustments that are likely to occur in response to estimated price changes. Relative to the base case, the CIE estimated that relaxing quarantine restrictions on apple imports from China, New Zealand and the United States would have the following impacts on the Australian apple industry by around 2014:

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Box 1 Summary: Grower Diversity Data Analysis

An apple perspective

Nationally, 231 farm businesses in 2008/09 were dedicated to 'apples only' compared with a much larger number of farm businesses - 3,282 - which produced apples and other fruit. The top three 'other fruit' were summer fruit, pears and cherries respectively.

The ABS data indicates that the majority of apples produced in 2008/09 were by growers who grew other fruit as well as apples. The "mixed apple" businesses produced 193 thousand tons of apples. But the smaller cohort of "exclusive apple" businesses produced 102 thousand tons of apples in that year, accounting for over one third of Australia's apple output in 2008/09. A significant number (1,034) of the "mixed apple" businesses produce a combination of three fruits - apples, pears and summer fruit. They produced over 48 thousand tons of fruit, contributing to 47% of the apple national production.

Two fruit mixed apple businesses are also widespread. Summer fruit was commonly grown with apples with 473 farm businesses producing 35 thousand tons of apples, contributing to 12% of the apple national production, followed by pears with 155 farm businesses producing 31 thousand tons of apples (11%) of the apple national production and then cherries with 127 farm businesses producing 27 thousand tons of apples, contributing to 9% of the apple national production.

A pear perspective

Total Australian pear production was 117 thousand tons in 2008/09. This included 'pears only' growers and growers of pears and other fruit. Nationally, there were 22 farm businesses dedicated to 'pears only' in 2008/09 with the largest concentration in the Goulburn Valley in Victoria. In comparison, 155 farm businesses produced a combination of both apples and pears. These businesses produced 55 thousand tons of fruit, contributing 31% to national apple production and 7% to the national pear production. The majority of apple and pear growers were from Victoria (77). Nationally there were 1,034 farm businesses that grew a combination of apples, pears and summer fruit, producing a total of 138 thousand tons of fruit. The majority of these were in Victoria producing 115 thousand tons and making up 432 farm businesses. A large proportion of pear growers grew a combination of pears and summer fruit, nationally 65 farm businesses grew a combination of pears and summer fruit. The majority (30) were in South Australia.

The summer fruit perspective

Total Australian summer fruit production was 147 thousand tons in 2008/09. About 42% of that came from growers who were exclusively involved in 'summer fruit' production. These farms numbered 890 businesses. A further 15 thousand tons of summer fruit was produced by businesses that grew summer fruit and apples but no other fruit. Growers who grew summer fruit and other fruit excluding apples produced 11 thousand tons of summer fruit.

The cherry perspective

Total Australian cherry production was 13 thousand tons in 2008/09. Production by 'cherry only' growers was 7.6 thousand tons. Nationally, 669 farm businesses produced cherries with 314 farm businesses dedicated to 'cherries only'. Growers who grew both 'apples and cherries' grew 29 thousand tons of fruit, of which apple production was 27 thousand tons and cherry production 1.5 thousand tons, contributing to 10% of the national apple production and 12% of the national cherry production. There were 230 farm businesses that grew summer fruit and cherries, contributing 1.4 thousand tons of cherries to national cherry production. The majority of 'cherries only' farm businesses were in NSW (98) followed by Victoria (68). Victorian cherry only growers produced 45% of total Australian cherries. NSW 'cherries only' growers produced 27% of total Australian cherries. Tasmania had 56 farm businesses that specialised in 'cherries only' production, producing 12% of Australian 'cherries only' crop.

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- farm gate prices will be around 21 per cent lower;
- wholesale prices will be around 13-14 per cent lower;
- apple consumption in Australia will be around 17 per cent higher;
- imports will achieve a market share of around 22 per cent;
- domestic production will be around 11 per cent lower;
- farm income will be around 32 per cent lower; and
- farm value-added will be around 33 per cent lower.

It is intended that the price data from the Melbourne wholesale markets will be analysed by APAL staff and disseminated to growers and the supply chain. The analysis will focus on price trends generally, the price differential between varieties and, if possible, the price differential between grades.

4.4 The grower database

The Excel Master Database spreadsheet is maintained weekly and is accessible to all APAL staff so they can contact growers. It is linked to a mail out list for the purposes of distribution of Australian Fruitgrower magazine and the Apple and Pear Annual Industry Report published by HAL. These publications are fundamental to the communication and dissemination of the outputs and knowledge generated by the projects funded by the research and development and the marketing levies.

An accurate and up to date database also provides important information about the industry, such as where growers are located and the concentration of growers in various areas.

4.5 Cool Store Stock Reports - Infopome

The Cool Store Stock Report has been regularly compiled and distributed over the life of the project.

The reporting was extended to provide a December 2009 and January 2010 report as there was a considerable carryover of stock. Those reports were also prepared in December 2010 and January 2011, even though stocks were considerably lower.

In 2011, the preparation of the stock report was changed from a largely manual system to an online version where the cool stores were able to insert their data into an online form which is emailed directly to a data base processing centre. This was introduced in February 2011 and to distinguish the new system from the old, the system is now called InfoPome.

At the same time, a bumper crop of Williams pears saw a strong request from industry to provide weekly reports of the Williams pear stocks so from 9 February till 23 May, a weekly report on Williams stocks was compiled and distributed. This was managed with considerable input from Graeme Forsythe as the InfoPome reports were set up to be

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end of month reports for all apple and pear varieties, so to manage the weekly Williams pear stock report, a work-around was put in place. Graeme has developed similar systems for other horticultural organisations, such as the well known Infocardo system for the avocado industry.

The data reconciliation at the end of the month became difficult as the end of month report for Williams pears did not coincide with the weekly reports. This meant that Williams pears were treated differently to the remaining apple and pear varieties.

Also, many of the cool stores that provided data for the Williams stocks had not been part of the cool store stock system previously and many of these cool stores required constant reminding to provide their data, which made the weekly reporting of Williams pears time very consuming.

The general monthly cool store stock report was commenced in March. The time spent on the Williams pears report, some teething difficulties with the InfoPome system and some cool stores having trouble filling in the new form meant too much data was missing by the end of February to be able to compile a report.

Similar issues also meant the April report was not prepared.

Time constraints at APAL and the need to repeatedly contact some cool stores for their data resulted in the earlier reports being delivered later in the month however by the August report, the timing was improved and the report was distributed on 9 September. It is anticipated that given more APAL staff time availability and improved timeliness in the supply of data, the timeliness of compiling and distributing the report will further improve.

The report is closely scrutinised by cool store operators and a number of industry people as the data is deemed reliable and many marketing decision are based on the data provided.

It is anticipated that more time will be put into managing InfoPome with the project being managed by the Market Development Manager, who started work at APAL on 19 September.

Some improvements are planned for next year, such as providing direct access to the report online.

The May to August monthly summaries are appended. Full reports are usually 17 pages long.

5. Communication

The cool store stocks data industry adoption has been very high and will continue to be so. Of all the data published by APAL, cool store stocks is the most closely scrutinised and acknowledged as being highly accurate. About 50 cool store operators take part in the survey and the reports from the survey are circulated to a larger number of growers and also to other industry people such as HAL staff who use the data to track the possible need to adjust promotional programs.

It is also available to all growers in the levy payers' section of the APAL website.

6. Recommendations

As imports are now a reality, the continuation of the data and analysis program is seen as germane to the industry. Data will assist growers to become better informed about industry trends and dynamics, which in turn will help them improve their competitiveness.

It is recommended that:

- A review of apple and pear industry data needs be undertaken to:
 - Identify alternate potential data sources including an assessment of the data generated by the State departments of agriculture, ABARE, Murray Darling Basin Authority, SPC Ardmona, HAL and other horticulture industries as well as the ABS (particularly from the 2011 Census and ongoing general agricultural production surveys).
 - Assess the requirements for production, price (including import price) and profitability data;
 - Compare the reliability, availability and costs associated with each source;
 - Assess the data generation possibilities of the Future Orchards program.
 - Continue discussions with ABS on ways to reduce the costs of their traditional apple and pear production survey;
 - Continue discussions with ABARES on ways to reduce the costs of a profitability survey (and whether this could concurrently replace the need for a separate production survey)
 - Initiate discussions with other temperate tree fruit industries to determine their interest in sharing the costs of production and price data

- The grower database continues to be maintained on a regular basis. This will ensure that APAL has an up-to date list of growers; reports and publications are distributed to the relevant people; and wastage is reduced by preventing the

distribution of materials to people no longer in the business of growing apple and pears. It is also recommended that APAL:

- Collect more email addresses to ensure as many growers as possible get the electronic information distributed by APAL.
 - Investigate outsourcing the management of the data base to improve functionality;
 - Investigate other potential uses of the database. It is proposed, for example, that an exit survey be conducted when disseminated material (mostly the AFGM) is returned undelivered or APAL is advised that recipients no longer wish to receive the publication. The exit survey would be designed to assist APAL's understanding of how many growers (by region) are leaving the industry and their reasons for doing so (either switching out of apples and pears into another agricultural pursuit or retiring) versus a wish to no longer receive hard copy publications.
- The cool-store stock information continues to be collected, analysed and disseminated.

7. Financial Reconciliation

Final Reconciliation of Project Funds



Horticulture Australia

Project Code:
 AP08055
 Project Title: Apple & Pear Industry Data & Analysis

Description	Budget approved from HAL \$	Payments Received from HAL \$	Total Expenditure on Activity \$	Expenditure on Capital Items \$	Budget minus Total Expenditure \$
ABS data gathering fee	153,000	122,000	64,086		88,914
Data Analysis	37,500	37,500	24,035		13,465
ABS Queries	26,500	26,500	18,900		7,600
Database Update	31,200	31,200	31,200		0
Database Supervision	43,800	43,800	43,800		0
Cool Store Stocks Report	53,100	53,100	53,100		0
Crop Forecasting	28,200	28,200	20,577		7,623
TOTAL	373,300	342,300	255,698	0	117,602

Attachment 1: Cool Store Stock Summaries

Cool Store Stock Report – Summary

May 2011

Apples

There were 141,887 tonnes of apples in store at 30 May 2011 compared to 155,489 tonnes recorded at 31 May, 2010, representing a nine percent decline on last year, and nine per cent below the three year average. However as seen below, missing data from South Australia suggest this figure will be revised upwards in the next report.

Victoria has the highest stocks levels at the end of May with NSW and Western Australia with the next highest stock levels. Respective tonnages of fruit in storage are 65,668, 21,969 and 20,417 tonnes.

State comparisons to May last year are mixed, with NSW and Queensland up 56 and 14 per cent respectively while Tasmania WA and Victoria and down on last year by 23, 20 and 11 per cent respectively.

South Australian figures need to be confirmed as they show just 5,332 tonnes compared to 13,232 tonnes at the same time last year.

Varieties are also showing marked differences. Fuji is up 28 per cent on last year and other apples are nearly three times the level of last year (up 280 per cent). Red Delicious and PINK LADY are up six and two per cent respectively, while Sundowner is down three per cent. Gala, Golden Del and Granny Smith are all down considerably on last year with stocks 23, 34 and 42 per cent below last year's tonnage.

Fuji

There were 14,216 tonnes of Fuji in store at 31 May 2011 compared to 11,004 tonnes in May 2010.

Gala

There were 12,697 tonnes of Gala in store at the end of May compared to 16,467 at the end of May last year.

Golden Delicious

There were 2,494 tonnes of Golden Delicious stocks at the end of May compared to 3,764 tonnes at the same time last year.

Granny Smith

Granny Smith stocks are well down on last year. There were 24,590 tonnes of Granny Smith in store at 31 May 2010 compared to 42,459 tonnes at the same time last year.

Pink Lady™

Pink Lady stocks at the end of May are 49,363 tonnes which compares to 47,418 tonnes at the same time last year.

Red Delicious

Red Delicious stocks are up slightly down on the same time last year. There were 18,252 tonnes of Red Delicious in store at 31 May compared to 17,178 tonnes the same time last year.

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Sundowner

There are 13,915 tonnes of Sundowners in storage at end of May compared to 14,393 tonnes at the same time last year.

Pears

Pear stocks are up 48 per cent on the same time last year with total storage of 34,290 tonnes compared to 23,155 tonnes at the end of May 2010.

Buerre Bosc levels at 4,021 tonnes at 31 May are up on last year's levels at 1,436 (+280 per cent) tonnes.

Packham stocks are up 43 per cent on last year with 26,344 tonnes compared to 18,415 tonnes at the same time last year. In May 2009, there were 26,128 tonnes of Packhams in store.

WBC pear stocks are at 1,218 tonnes.

Other pears stocks are down 17 per cent on the same time last year with 2708 tonnes compared to 3,257 tonnes at the same time last year.

Cool Store Stock Report – Summary

June 2011

Apples

There were 133,128 tonnes of apples in store at 30 June 2011 compared to 141,887 tonnes recorded at end of May, 2011 and compared to 137,315 tonnes at the same time last year. This represents just a three percent decline on last year and eight per cent below the three year average.

Victoria has the highest stocks levels at the end of June with NSW, Queensland and Western Australia having the next highest stock levels. Respective tonnages of fruit in storage are 60,053, 19,940, 19,647 and 18,558 tonnes.

State comparisons to June last year are mixed, with NSW and Queensland up 64 and 28 per cent respectively while SA WA and Victoria and down on last year by 45, 25 and eight per cent respectively.

South Australian figures still look low as they show just 6,649 tonnes (which is up from 5,332 tonnes reported last month, confirming caution about SA stats) and compared to 11,963 tonnes at the same time last year.

Varieties are also showing marked differences. Fuji is up 48 per cent on last year and 'other apples' are nearly two and a half times the level of last year (though on small volume). Red Delicious and PINK LADY are up 14 and 16 per cent respectively, while Sundowner is virtually the same as last year. Gala, Golden Del and Granny Smith are all down considerably on last year with stocks 20, 20 and 38 per cent below last year's tonnage.

Fuji

There were 12,657 tonnes of Fuji in store at 30 June 2011 compared to 8,543 tonnes in June 2010. There were 14,216 tonnes at the end of May, 2011.

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Apple and Pear Industry Data and Analysis

Gala

There were 10,308 tonnes of Gala in store at the end of June compared to 12,754 at the end of June last year. There were 12,697 tonnes at the end of May, 2011.

Golden Delicious

There were 2110 tonnes of Golden Delicious stocks at the end of June compared to 2,636 tonnes at the same time last year. There were 2,494 at the end of May, 2011.

Granny Smith

Granny Smith stocks are well down on last year. There were 22,216 tonnes of Granny Smith in store at 30 June 2011 compared to 35,561 tonnes at the same time last year. There were 24,590 tonnes at the end of May, 2011.

Pink Lady™

Pink Lady stocks at the end of June were 48,714 tonnes which compares to 42,175 tonnes at the same time last year. There were 49,363 tonnes at the end of May, 2011

Red Delicious

Red Delicious stocks are up on the same time last year. There were 16,182 tonnes of Red Delicious in store at 30 June compared to 14,145 tonnes the same time last year. There were 18,252 tonnes at the end of May, 2011.

Sundowner

There are 15,240 tonnes of Sundowners in storage at end of June compared to 15,284 tonnes at the same time last year. An adjustment has been made to the volume of Sundowners as at the end of May, the volume was 13,915 tonnes.

Pears

Pear stocks are up 25 per cent on the same time last year with total storage of 23,785 tonnes compared to 18,991 tonnes at the end of June 2010. There were 34,290 tonnes in store last month.

Buerre Bosc levels at 3,171 tonnes at 30 June are way up on last year's levels at 1,037 (+300 per cent) tonnes. There were 4,021 tonnes at the end of May, 2011.

Packham stocks are up 21 per cent on last year with 18,373 tonnes compared to 15,149 tonnes at the same time last year. In May 2011 there were 26,344, tonnes of Packhams in store.

Other pears stocks are down 20 per cent on the same time last year with 2,238 tonnes compared to 2,806 tonnes at the same time last year.

Cool Store Stock Report – Summary

July 2011

Apples

There were 117,669 tonnes of apples in store at 31 July 2011 compared to 136,785 tonnes recorded at end of June, 2011 and compared to 114,569 tonnes at the same time last year. This represents just a three percent increase on last year and nine per cent below the three year average.

Victoria has the highest stocks levels at the end of June with Queensland, NSW, and Western Australia having the next highest stock levels. Respective tonnages of fruit in storage are 50,791 16,947, 16,622 and 16,352 tonnes.

State comparisons to July last year are mixed, with NSW and Queensland up 70 and 44 per cent respectively while WA, SA, Victoria and Tasmania are down on last year by 25, seven, five and two per cent respectively.

South Australian figures have been checked and now appear accurate.

Varieties are also showing marked differences. Fuji is up 60 per cent on last year and 'other apples' are twice the level of last year (though on small volume). Red Delicious and PINK LADY are up 18 and 24 per cent respectively, while Sundowner is now nine per cent higher than last year. Golden Del, Gala and Granny Smith are all down on last year with stocks seven, nine and 40 per cent below last year's tonnage.

Fuji

There were 11,153 tonnes of Fuji in store at 31 July 2011 compared to 6,942 tonnes in July 2010. There were 13,147 tonnes at the end of June, 2011.

Gala

There were 9,299 tonnes of Gala in store at the end of July compared to 10,172 at the end of July last year. There were 11,130 tonnes at the end of June, 2011.

Golden Delicious

There were 2190 tonnes of Golden Delicious stocks at the end of July compared to 2,365 tonnes at the same time last year. There were 2,567 tonnes at the end of June, 2011.

Granny Smith

Granny Smith stocks are well down on last year. There were 19,585 tonnes of Granny Smith in store at 31 July 2011 compared to 33,141 tonnes at the same time last year. There were 22,929 tonnes at the end of June, 2011.

Pink Lady™

Pink Lady stocks at the end of July were 43,843 tonnes which compares to 35,319 tonnes at the same time last year. There were 48,912 tonnes at the end of June, 2011

Red Delicious

Red Delicious stocks are up on the same time last year. There were 13,886 tonnes of Red Delicious in store at 31 July compared to 11,762 tonnes the same time last year. There were 16,535 tonnes at the end of June, 2011.

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Apple and Pear Industry Data and Analysis

Sundowner

There were 14,717 tonnes of Sundowners in storage at end of July compared to 13,513 tonnes at the same time last year. There were 15,816 tonnes at the end of June, 2011.

Pears

Pear stocks are up 26 per cent on the same time last year with total storage of 19,312 tonnes compared to 15,344 tonnes at the end of July 2010. There were 26,753 tonnes in store last month.

Buerre Bosc levels were at 2,488 tonnes at 31 July, way up on last year's levels at four times the stocks at the same time last year (616 tonnes). There were 3,470 tonnes at the end of June, 2011.

Packham stocks are up 18 per cent on last year with 15,111 tonnes compared to 12,747 tonnes at the same time last year. In June 2011 there were 20,563 tonnes of Packhams in store.

Other pears stocks are down 13 per cent on the same time last year with 1,713 tonnes compared to 1,971 tonnes at the same time last year. Stocks are down from 2,713 and the end of June, 2011.

Cool Store Stock Report – Summary

August 2011

Apples

There were 95,540 tonnes of apples in store at 31 August 2011 compared to 117,669 tonnes recorded at end of July, 2011 and compared to 89,526 tonnes at the same time last year. This represents just a seven per cent increase on last year and four per cent below the three year average.

Victoria has the highest stocks levels at the end of June with Western Australia, Queensland and NSW having the next highest stock levels. Respective tonnages of fruit in storage are 41,145 13,905, 13,849 and 14,507 tonnes.

State comparisons to last year are mixed, with NSW holding double last year's August stocks and Queensland up 40 per cent on the same time last year. Victoria is virtually the same as August last year while SA, WA and Tasmania are down five per cent, 14 per cent and 34 per cent on the same time last year.

Varieties are also showing marked differences to last year's stocks. Fuji is up 71 per cent on last year and Pinks are up 41 per cent. Other varieties up on last year's figures are Sundowner, up 25 per cent, 'other apples' up 21 per cent and Red Delicious up 12 per cent. Granny Smith, Golden Delicious and Gala are down on last year's figures by 40, 35 and 12 per cent respectively.

Fuji

There were 8,277 tonnes of Fuji in store at 31 August 2011 compared to 4,826 tonnes in August 2010. There were 11,153 tonnes at the end of July, 2011.

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Apple and Pear Industry Data and Analysis

Gala

There were 7,035 tonnes of Gala in store at the end of August compared to 7,950 at the end of August last year. There were 9,299 tonnes at the end of July, 2011.

Golden Delicious

There were 1,185 tonnes of Golden Delicious stocks at the end of August compared to 1,846 tonnes at the same time last year. There were 2,190 tonnes at the end of July, 2011.

Granny Smith

Granny Smith stocks are still well down on last year. There were 16,374 tonnes of Granny Smith in store at 31 August 2011 compared to 27,139 tonnes at the same time last year. There were 19,585 tonnes at the end of July, 2011.

Pink Lady™

Pink Lady stocks at the end of August were 36,957 tonnes which compares to 26,170 tonnes at the same time last year. There were 43,843 tonnes at the end of July, 2011

Red Delicious

Red Delicious stocks are up a little on the same time last year. There were 11,052 tonnes of Red Delicious in store at 31 August compared to 9,894 tonnes the same time last year. There were 13,886 tonnes at the end of July, 2011.

Sundowner

There were 13,251 tonnes of Sundowners in storage at end of August compared to 10,536 tonnes at the same time last year. There were 14,717 tonnes at the end of July, 2011.

Pears

Pear stocks are up 34 per cent on the same time last year with total storage of 14,283 tonnes compared to 10,630 tonnes at the end of August 2010. There were 21,388 tonnes in store at the end of July 2011.

Beurre Bosc levels were at 1,551 tonnes at 31 August, way up on last year's levels when stocks were only 197 tonnes. There were 2,717 tonnes at the end of July, 2011.

Packham stocks are up 22 per cent on last year with 11,533 tonnes in store at the end of August compared to 9,419 tonnes at the same time last year. In July 2011, there were 16,938 tonnes of Packhams in store.

Other pears stocks are up 18 per cent on the same time last year with 1,199 tonnes at the end of August compared to 1,014 tonnes at the same time last year. Stocks are down from 1,734 and the end of July, 2011.