



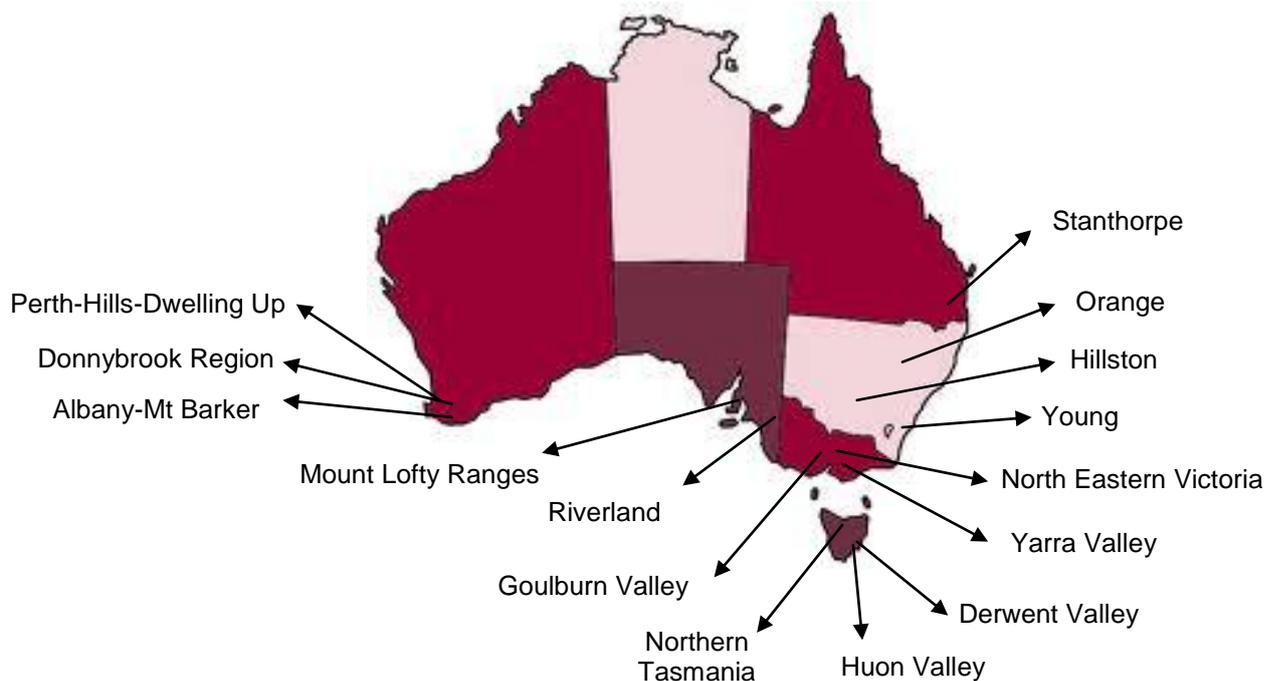
AUSTRALIAN CHERRIES INDUSTRY BACKGROUND

Production Overview

Cherries are produced in six states with New South Wales, Victoria and Tasmania being the three largest producers. Tasmania has experienced a rapid expansion in plantings and has a strong export focus enhanced by its relative freedom from pests and diseases.

South Australia is the fourth largest producer with a significant proportion of its production sold interstate and a small percentage also exported. Both Western Australia and Queensland are relatively small producers primarily focusing on their domestic markets.

Main Areas of Production



The following provides a brief synopsis of the industry situation in each cherry producing State.

New South Wales

The main cherry producing areas of New South Wales have traditionally been around the centres of Young and Orange. Newer areas include Hillston, Mudgee, Wellington, Tumut and Batlow. These new areas have started growing cherries to try to extend the cherry season.

Hillston, although considered a marginal area for cherry production, aims at harvesting the earliest cherries in Australia. Wellington and Mudgee are also considered early maturing areas. Early maturing cherries may have greater fluctuating yields (seasonal influences) or may not yield as much as later maturing varieties but do obtain market premium prices.

Other regions around Orange are being developed to offer increased rain and hail risk management. These areas have similar climatic conditions to Orange but are far enough away that they may avoid rain, hail and frost events that may occur in Orange.

Production Figures:

Number of Enterprises	Number of hectares (estimate)	Production (tonnes)
108	800	4,407

Production Characteristics:

The cherry season in New South Wales starts around late October (Hillston) and continues through Christmas, finishing around mid January. A number of varieties and growing areas are used to achieve this extensive spread in fruit maturity. Most farms will select early, mid and late varieties so that if a rain event hits one of the varieties there are others that may cover these crop losses.

The main varieties grown vary by district. The Orange variety mix predominately comes from Summerland (Canada). Key varieties grown here include Merchant, Van, Kordia, Lapin, Stella, Simone, Sweetheart, Ranier and Bing.

Empress, Burlat, Supreme, Stella, Lapin and Sweetheart varieties are grown in Young but Ron’s seedling is the dominant variety.

Less widely grown varieties include Simone, Sylvia and Black Star.

Victoria

The main cherry growing regions of Victoria are located in north eastern Victoria, Goulburn Valley, Upper Goulburn/Strathbogie and in southern Victoria. These areas produce approximately 85% of Victoria’s cherries. Other smaller areas are located throughout Victoria in areas such as Bendigo and Kerang.

Production Figures:

Number of Enterprises	Number of hectares (estimate)	Production (tonnes)
95	800	4,500

Production Characteristics:

The main production season is mid November to late January, with some early varieties starting in early November, and can last until late February with later varieties.

Because of the wide range of climate growing areas, local growers can produce fruit for about three months of the year from November to February. Fruit grown in the northern Victorian area matures much earlier than the higher regions, especially Tolmie, which can still be harvesting up to late February.

Current production is estimated at approximately 4,500 tonnes, although this figure is highly dependent on climatic conditions such as frost during flowering and rain during harvest which can severely reduce the harvested crop.

Modern production systems are used in orchards with most of the newer plantings being trained to open bush systems. Orchards are irrigated using low flow systems and growers are extremely conscious of the need to improve their management practices related to orchard soil management.

More than 50 varieties are currently being grown. However, as buyers are starting to demand improved quality and longer shelf life, many of the older and poorer performing varieties are being replaced.

Merchant, Bing, Supreme, Empress, Stella, Lapin, Sweetheart and Van are the main varieties grown.

A large number of other varieties have been introduced recently. The best performing of these are Ferprime, Simone, Early Sweet, Royal Rainier, Sweet Georgia, Kordia, Chelan, Earlise and Australise.

South Australia

There are three cherry production areas in South Australia. The major one is the Mount Lofty Ranges (commonly referred to as the Adelaide Hills). The other two are located in the Riverland region and the south east of South Australia.

The Adelaide Hills area is the most significant region producing approximately 90-95% of South Australia's cherries. This area is subdivided into several smaller areas which have all developed to take advantage of specific microclimate and maturity niches. Although geographically small in area the maturity times within the Adelaide Hills can vary by up to two to three weeks for the same variety. Sub-regions include Montacute (earliest area), Cherryville, Norton Summit, Basket Range, Summertown, Uraidla, Forest Range, Lenswood, Kenton Valley and Gumeracha.

A small area south of Adelaide Hills known as the Fleurieu Peninsula also has a small amount of cherry production. The growers in this area are small and focus on local market sales. The south east region is a relatively new area that focuses on local region sales. The Riverland region, to the north east of Adelaide, is

an early production area focusing on producing early fruit for the eastern states and Western Australian markets.

Production Figures:

Number of Enterprises	Number of hectares (estimate)	Production (tonnes)
118	590	1,500-1,800

Production Characteristics:

The main production season is mid November to mid January, with some early varieties starting in mid October (Riverland). It can last until late January with the newer later maturing varieties.

As in Victoria, more than 50 varieties are currently being grown but, as buyers are starting to demand improved quality and longer shelf life, many of the poorer performing varieties are being replaced.

Stella and Lapin are the dominant varieties grown with the Sweetheart and Simone also popular. There is a wide range of other varieties grown based primarily on the market niche a region/grower has.

Bing, Supreme, Empress, Van, Summit, Sunburst, Kordia, Vista and Lambert are declining in popularity. Rainier is only grown by a few specialist growers. Ron's Seedling is still grown by a number of growers.

Newly introduced varieties that are performing well include Black Star, Earlisweet, Sweet Georgia, Chelan, Earlise, Australise, Santina, Samba, Sylvia and Regina.

Tasmania

The Tasmanian cherry season commences early in December and continues through to late February, with peak production in mid to late January.

Cherries are grown commercially in most regions of the state. The main production hubs are Huon/Channel and Derwent Valley, with commercial production also taking place in the south east districts (including the Coal River Valley and Sorell), the Tamar region and on the north west coast.

Production Figures:

Number of Enterprises	Number of hectares (estimate)	Production (tonnes)
76	560	4,000

Production Characteristics:

All new orchards are medium to high intensity plantings. Varieties planted are chosen according to good bearing ability, good-sized fruit, time of harvest and particularly resistance to cracking.

The main varieties grown in Tasmania are Lapin, Simone, Sweetheart, Sylvia, Regina and Kordia, new varieties include Sweet Georgia, and minor varieties include Stella, Summit, Sunburst and Merchant.

Western Australia

The main cherry growing regions in Western Australia are located in a narrow growing belt stretching from Donnybrook to Pemberton in the south west of the state. This region involves some larger growers in the Donnybrook/Kirup and Manjimup/Pemberton areas and smaller ones through the Balingup and Bridgetown shires. This belt produces approximately 85% of Western Australia's cherries. Other smaller areas are located between the Mt Barker and Albany region with a few growers in the Dwellingup area.

Production Figures:

Number of Enterprises	Number of hectares (estimate)	Production (tonnes)
70	70	500

Production Characteristics:

The main production season is mid December to late January, with some early varieties starting in early November, and can last until February with later varieties.

Bing, Stella, Lapin, Sweetheart and Van are the main varieties grown. Other 'older' varieties grown include Merchant, Supreme and Empress.

A large number of other varieties have been introduced recently and the best performing of these are Ferprime, Simone, early Sweet, Royal Rainier, Sweet Georgia, Kordia, Stella, Chelan, Earlise and Australise.

There have also been a lot of new and untried varieties planted across the growing regions, including Sandra Rose, Sweet Early, Red Crystal, Celeste, Samba, Index and Symphony.

Queensland

The main cherry growing area of Queensland is the Granite Belt region of south east Queensland, centred around Stanthorpe. This region mainly involves smaller growers who use cherry production to supplement other farm income. Only a small number of enterprises use cherries as their main income source. Main production is in the Glen Aplin and "The Summit" districts of the Granite Belt, with smaller producers in the Amiens, Pozieres and Severnlea areas. This area produces 100% of Queensland cherries.

Production Figures:

Number of Enterprises	Number of hectares (estimate)	Production (tonnes)
18	20-25	36

Production Characteristics:

The main production season is late October to late December, with some early varieties starting in mid October and later varieties lasting until late January.

The main varieties grown are Bing, Stella, Lapin, Brooks and Early Sweet and others grown include Early Burlat, Burgsdorf, Supreme and Empress.

Varieties under test include Australise, Earlise, Kordia and some of the varieties from the Australian Breeding Program including Sir Tom, Sir Don, Dame Nancy and Dame Roma.

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