

The perfect location for producing superior berries

Tasmania has been recognised by leading berry company, Costa Group, as having one of the best climates for growing berries anywhere in the world. Tasmania's temperate climate, abundant water and available land make the island ideal for berry production and this is further enhanced by Tasmania's Biosecurity System and relative pest and disease free status.

Tasmanian berry growers utilise the most up-to-date production methods in Australia, with recent expansion and private investment in the industry delivering new, world-class technology in both the range of berry varieties and production systems. These advancements enable the industry to produce the finest quality berries with superior flavour for up to eight months of the year.

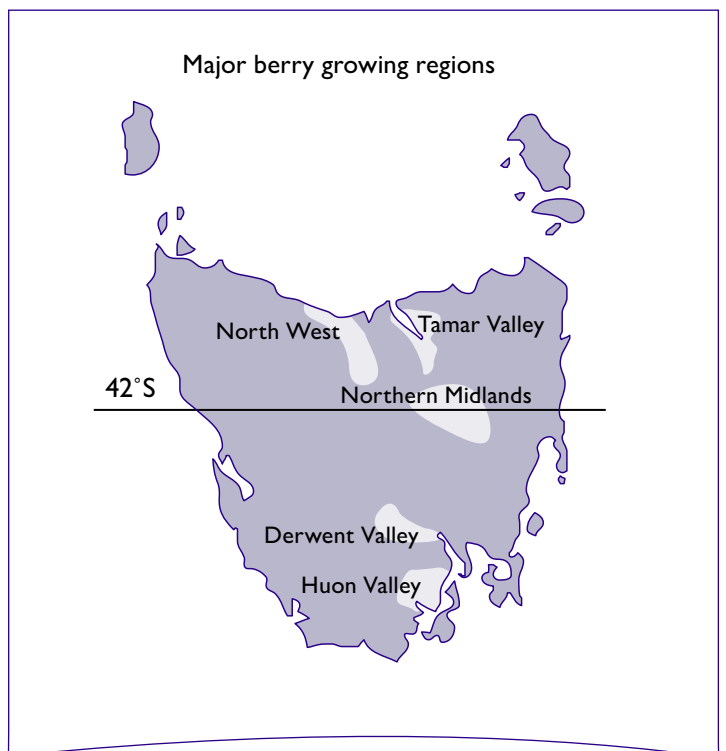
In 2010-11, berry fruit production in Tasmania was valued at \$16.1 million¹, representing five per cent of Australia's total



production. Rapid expansion over recent growing seasons has increased production areas and yield levels. Growing consumer demand for berries nationally and internationally presents expansion opportunities for Tasmanian producers.

Tasmania represents one per cent of Australia's land mass, yet receives 13 per cent of the nation's annual rainfall. The state's natural water advantage is further enhanced by the development of irrigation infrastructure. Significant investment by the Tasmanian and Australian Governments, in conjunction with the private sector, in Tasmanian irrigation schemes offers surety of water supply for current production, productivity growth and diversification into high value enterprises.

1. Tasmanian Food and Beverage Industry Scorecard 2010-11, Department of Primary Industries, Parks, Water and Environment





Key reasons for investing in the Tasmanian berry industry

- » ideal growing conditions for berries, with the essential winter chill followed by a long mild growing season that supports fruit development, enhanced flavour and longer shelf life. In major production regions, chill hours (0-7.2°Celsius) range from around 800 to 1400 hours
- » a biosecurity system, based on its island status, that leaves Tasmania relatively free of major pests and diseases
- » quarantine status that can offer real production and market access advantages
- » surety of water supply through existing and planned irrigation schemes, supplementing the state's natural rainfall
- » increased global demand for berry fruit driven by recognition of their health benefits
- » relatively benign climate change forecasts for Tasmania, providing opportunities to continue the production of cool climate fruit
- » new technology and production systems, such as poly tunnel and table top technologies, that offer increased productivity and fruit quality, as well as the potential to extend the growing season
- » improved berry varieties that deliver a longer production period of high quality fruit
- » a late growing season that complements the availability of berries from the major production regions in Australia
- » Tasmanian brand recognition in premium niche national and future international markets.

Seasonal availability²

Product	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Availability per year
Blackberries									4 months
Blackcurrants									1 month
Blueberries									6 months
Raspberries									6 months
Strawberries									8 months

The Tasmanian berry industry

Tasmania mainly produces fresh raspberries, blueberries and strawberries. Small volumes of blackberries and blackcurrants (for processing) are also grown.

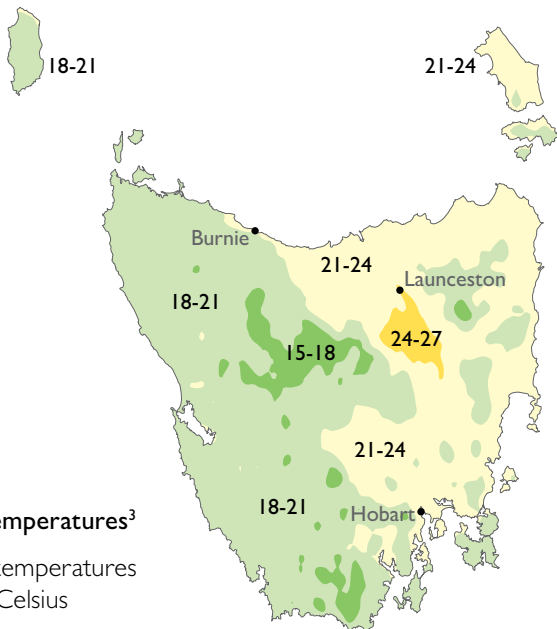
The following chart highlights the harvest windows across the range of Tasmanian berries.

The Tasmanian berry sector is currently made up of around 50 growers, most of whom have small growing areas of less than 10 hectares, along with a small number of much larger operators who have holdings of 20 hectares or more.

Berry production is distributed across the state in the major horticultural regions, including the Huon Valley, Derwent Valley, Tamar Valley, north west coast and Northern Midlands. The smaller operators supply the local markets and the larger operators supply both local and national markets.

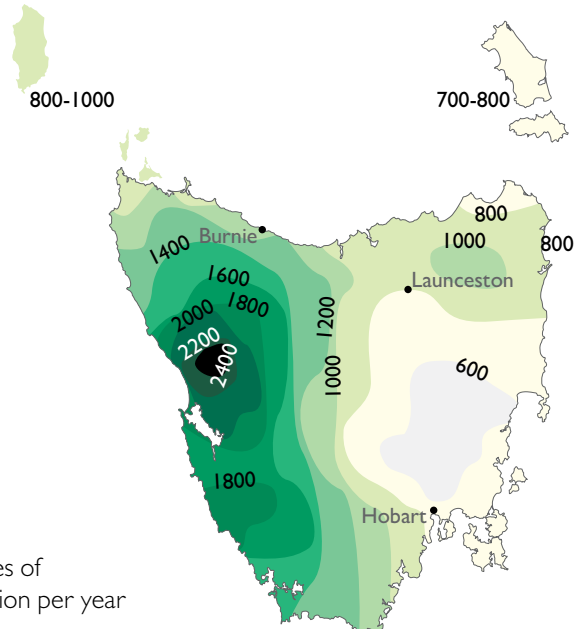
Although the state's berry processing sector is currently small, it has recently experienced significant expansion in infrastructure investments. These include freeze drying and cool store facilities, and enhancing capacity to produce semi-processed products such as seedless purees. Niche value-added products are also produced, including freeze-dried whole fruit and powders. Further product development opportunities are currently being explored.

A number of berry producers are increasingly incorporating tourism and visitor experiences into their business model to add value through cafes, retail outlets and 'pick your own' experiences.



Summer temperatures³

Maximum temperatures in degrees Celsius



Rainfall⁴

Millimetres of precipitation per year

Raspberries

Tasmania is the second-largest producer of raspberries in Australia, producing approximately 450 tonnes of raspberry fruit annually, representing 31 per cent of national production⁵.

As a deciduous plant, raspberries have a chill requirement to overcome dormancy of flower and leaf buds. The cool, seasonal conditions in Tasmania are well suited to commercial raspberry production, producing berries with a particularly good flavour.

The Tasmanian season is from November to April and is extended by the use of autumn bearing varieties and poly tunnels.

Raspberries are grown to supply fresh berry markets locally and interstate. The larger growers of fresh berries are located in the Dunorlan, Devonport and Cressy areas and supply interstate markets through the summer and autumn season. A significant volume of raspberries for the processing market is also grown in the Derwent Valley and is used in processed products such as cordials and jams.

In 2011, Australia's raspberry production of 1 436 tonnes was supplemented by 5 117 tonnes of imported product. The majority of this imported product is in frozen form for processing.

Blueberries

Tasmania currently produces approximately 300 tonnes of blueberry fruit annually⁶, which accounts for five per cent of total Australian production volumes.

Tasmanian climate conditions are ideal for high bush blueberry production, as it requires sufficient winter chill hours to successfully break dormancy and mild summer temperatures, preferably with a mean maximum monthly temperature of 15 to 26°Celsius.

Tasmania can supply blueberries from November to April. Ideally, Tasmanian production targets late season markets when prices are elevated. While Tasmania's production window crosses

over with New Zealand imports, the combined volume of both regions does not approach peak season volumes.

The main growing region for blueberries is the north west coast, where there is a large farm growing over 50 hectares.

Annual consumption in Australia has been growing over the past decade and looks likely to continue. Australia currently imports blueberries to meet its demand, although most of these imports are in frozen form for processing. Sustained and increasing demand may mean that there is an opportunity to increase local production.

In addition, Tasmania's quarantine status would allow for export of blueberries into Asia, where there has been a significant increase in demand.

Strawberries

Tasmania currently produces 600 tonnes, or just one per cent of the national production⁷, with a season that extends from October through to May. This growing season has been extended by the use of poly tunnels and new varieties.

The majority of Tasmanian strawberry production is currently consumed within the state, with the larger producers also supplying interstate markets. In addition, small amounts have been sent to Indonesia and Malaysia.

Although Tasmanian production volumes are relatively small, there is potential for these volumes to increase to meet growing domestic demand.

Local Australian strawberry production in 2012-13, was 69 363 tonnes⁸. This was supplemented by 6 900 tonnes of imported product. The majority (98 per cent) of imported product was in processed or frozen forms and was largely sourced from China. The remaining two per cent was in fresh form and sourced from the United States and New Zealand. Nationally, some 800 tonnes was exported overseas.

3. Three-monthly mean maximum temperature for Tasmania, December 2013 to February 2014. Australian Bureau of Meteorology, www.bom.gov.au

4. vW Maps c 2009 Martin von Wyss, VW Maps Pty Ltd

5. Freshlogic Wealth from Water Raspberry Market Profile 2013

6. Freshlogic Wealth from Water Blueberry Market Profile 2013

7. Freshlogic Wealth from Water Strawberry Market Profile 2013

8. *ibid*

Climate advantage

Tasmania has a temperate maritime climate, cooled by prevailing westerlies off the Southern Ocean. Temperatures are generally mild with extremes a rarity. Rainfall is evenly distributed throughout the year. These features are demonstrated in the temperature and rainfall charts. Increasingly, significant extreme weather events occurring on mainland Australia provide Tasmania with climate change opportunities.

Tasmania's most significant natural resource advantage is water. Indications are that this advantage will remain into the future. A 2010 climate change forecast predicted no significant change to projected total annual rainfall over the 21st century.

Accessibility

Airports are located in Hobart, Launceston, Devonport and Burnie. Air freighted produce can arrive at interstate markets within 12 hours of dispatch.

Disease free

As an island, Tasmania has a clear biosecurity advantage. Tasmania's biosecurity system is at the very core of the Tasmanian brand, as its natural environmental values and quality produce rely upon the state's relative freedom from pests, diseases and weeds.

Tasmania's relative pest-free status offers additional opportunities to access a variety of international markets that are closed to other regions.



Explore the opportunities and your future potential in Tasmania

The Tasmanian Government has a vision for Tasmania to substantially increase its food and agriculture production, and to become a major supplier of Australia's premium food products. As a result, the government is keen to work with potential investors to secure investment for the berry industry within the state.

If you are interested in investing in Tasmania, we would like to talk to you.

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