

Australian Update



2018 Chapman University
Phytosanitary Irradiation Conference
Bangkok
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Australian horticulture 101

Target Markets

- Premium retail
- Educated consumers
- Asia Pacific

Strengths

- High quality
- High service
- Speed to market (Asia)
- Excellent food safety



Challenges

- High cost
- Complex biosecurity

Stake holders

1000's Private companies
(producers, marketers and distributors)

60+ Plant industry bodies

Duopoly retail industry

8 State Governments

Federal Government

DAWR

FSANZ



P.I. fits very well

Enhance Australia's advantages:

Quality, speed, freshness & safety

Overcome challenges:

Low cost, differentiation & higher returns

Mutual solutions:

Unique, multi crop solution with one time barriers



Steritech National Irradiation Plan

Enhance Australia's biosecurity

Existing facilities: **Brisbane**,
Sydney, Melbourne

Coordinated with government
and industry stakeholders

Single provider challenges &
benefits



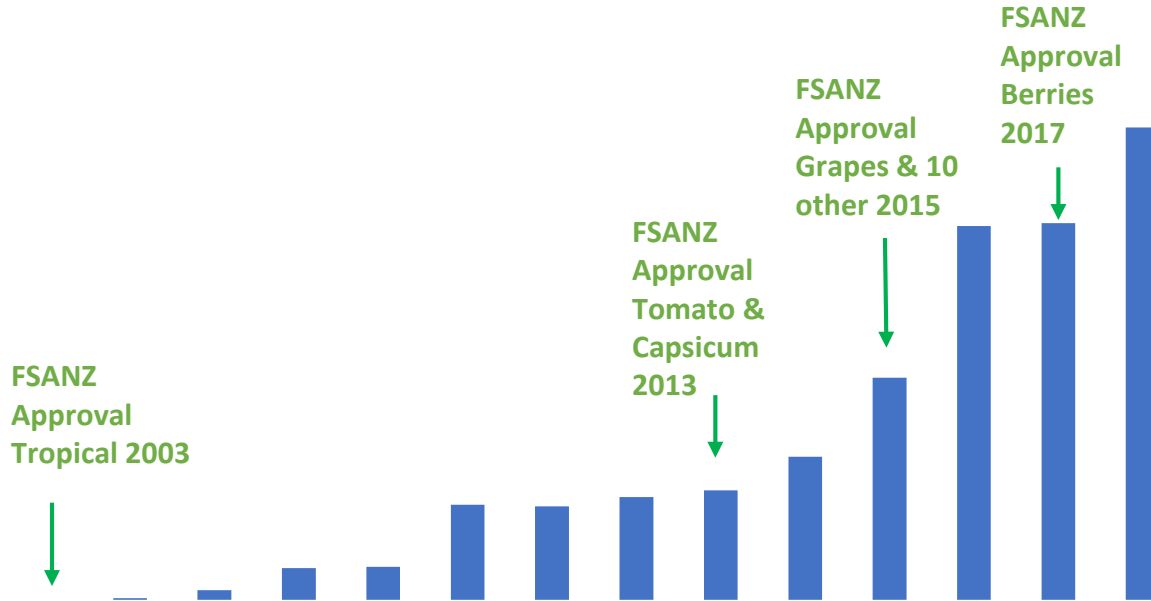
13 years of positive growth

2017/18 Season: >4000Mt fresh produce treated in Australia



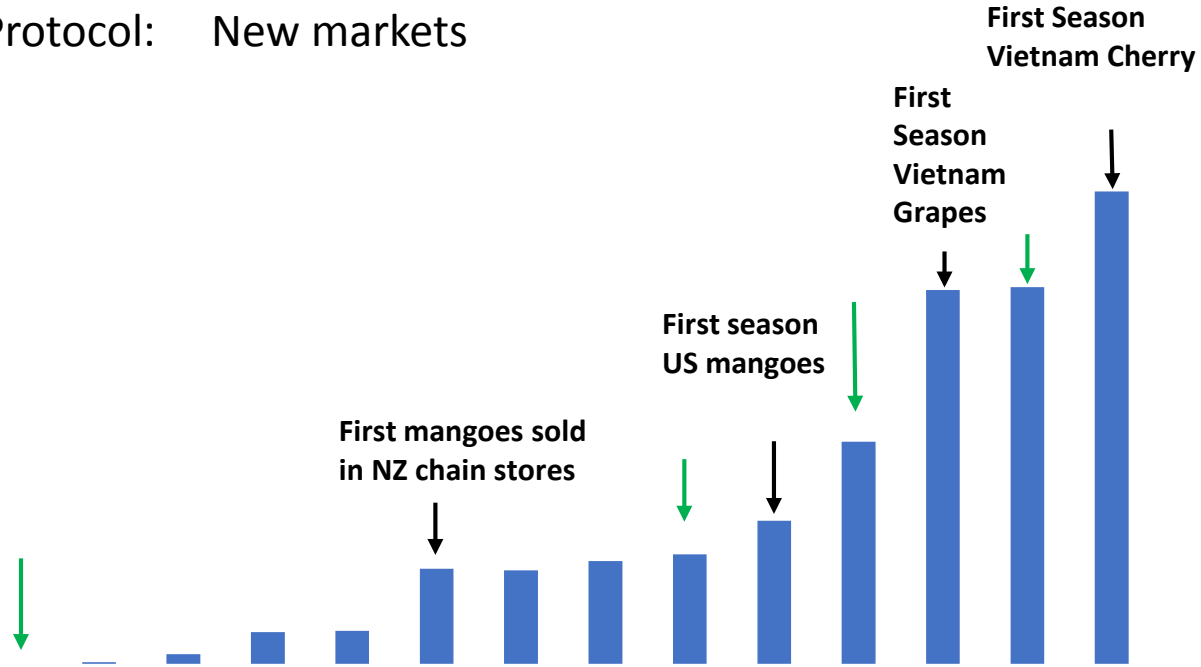
13 years of positive growth:

AUS / NZ Food Standards: Incremental progress



13 years of positive growth:

Protocol: New markets



Crop rank by volume

- #1 Table Grapes
- #2 Mangoes
- #3 Cherries
- #4 Tomatoes
- #5 Misc. Tropicals
- #6 Citrus

Total: 15+ commodities



Market rank by volume

- #1 Vietnam
- #2 New Zealand
- #3 United States
- #4 Indonesia
- #5 Domestic

Thailand announced import protocol for Australia March 2018



Export – Import - Domestic

Australian Biosecurity relies on three critical end point treatments:

- Cold disinfestation
- Irradiation
- Fumigation

Steritech treatments:

>95%	export
<5%	domestic
0%	import

What does the imbalance indicate?



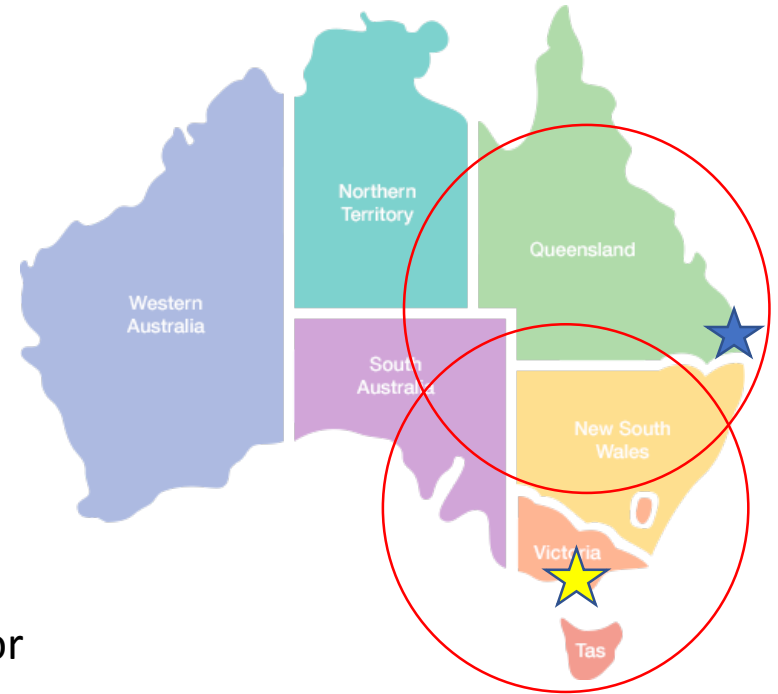
Significance of Melbourne

50% of all Australia's fruit trade passes through Melbourne

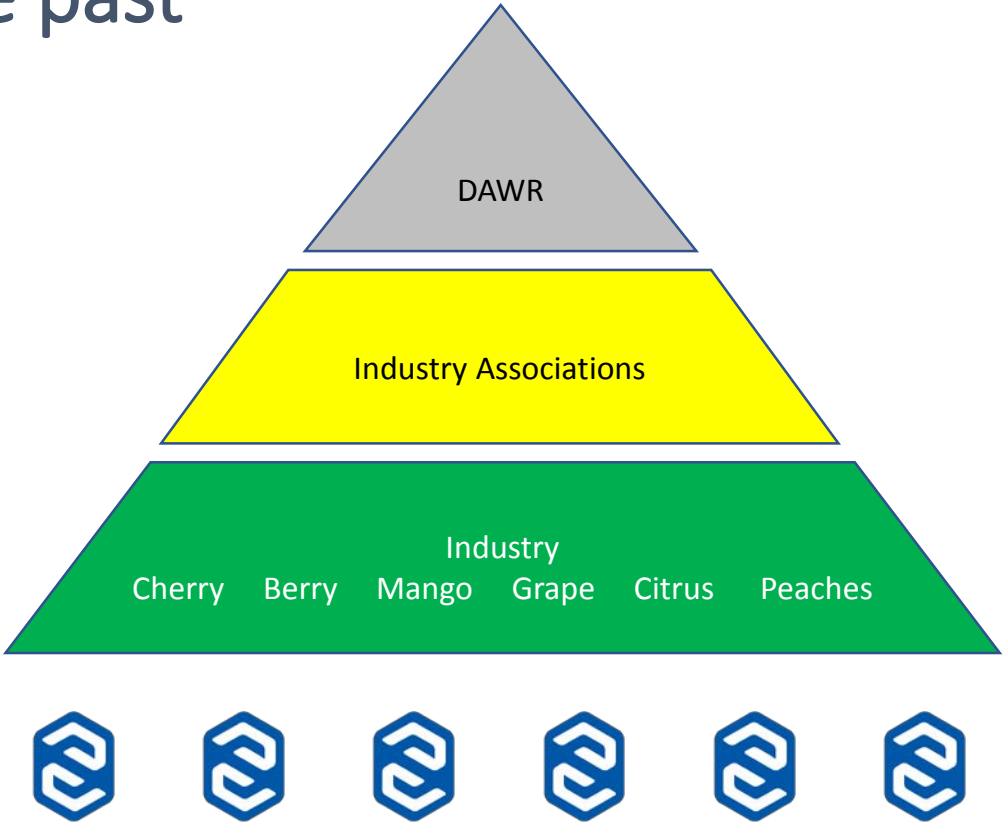
50% of current treatment demand comes from Victoria

Fast access from surrounding states
TAS, NSW, SA and NT growers

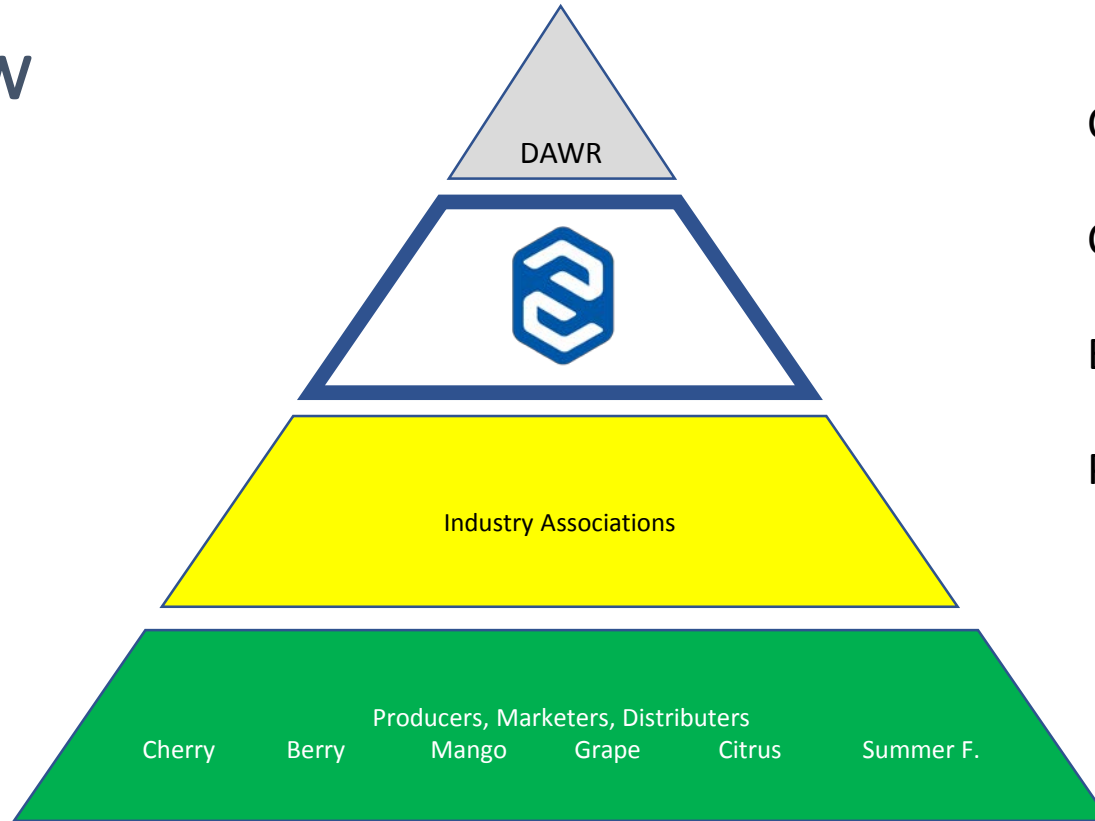
Melbourne is the primary distribution point for mainland product shipping to TAS



In the past



Now



Clarity

Coordination

Efficiency

Progress

Our domestic catalyst

MB issues

- Retail recalls
- Quality (new 17°C schedule)

Concern to Tasmanian growers

Demands from farmers for high risk fruit fly host material to be treated with irradiation



Fruit Growers Tasmania conference

2018 conference focus: Biosecurity / Irradiation

Unanimous industry support

State and federal government commitment



Irradiation must be on a level playing field with CD and MB regulations

National TV and radio coverage



Fruit Growers
Tasmania

2017/18 Successes

Significant volume growth: +33% !

Industry now demanding irradiation – cultural change

Announcement of new Melbourne facility plans

Protocols progressed – Thailand & NZ

Next 12 months

Research and capacity building exercises

National retail acceptance / trade

FSANZ generic approval

Post harvest quality research

Commercial value add services

Objective quality reporting

Export related services

Existing markets:
expand protocols

New markets:
Expedite acceptance

Must create commercial value



VS



Technical advantage-

Treats internal seed weevil and larvae

Commercial advantage-

Delivers higher maturity mango without over-ripening

Efficient global progress

Mutual challenges and opportunities

Each region has unique strengths and weaknesses

Achieve more together: complimentary efforts, united strategy

Systems must harmonise

Non bio-sec. issues

Biosecurity systems manage pest and disease but there are other needs

Emerging challenges:

- Air Cargo Security – new requirements

- Food Safety - marriage of different regional systems

Today's systems must accommodate tomorrow's needs



STERITECH

Protecting what matters

Thank You

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