



Newsletter

Welcome to our Christmas Newsletter for 2006. All at Scholefield Robinson wish you a Merry Christmas and a prosperous New Year.

INDUSTRY COMMENT



Water

Water issues are the main focus of many of our clients along the Murray Darling Basin as well as in other areas. Drought conditions have led to low flows into dams and rivers. In the 2006/07 season permanent water licence entitlements have been reduced to 60% in South Australia, 55% in NSW and 95% in Victoria. The prices for the limited water available on the market has skyrocketed. If the drought continues for another season the consequences in 2007/08 will be dire.

A copy of an article we have prepared on "Grapevine Management Options in Times of Drought and Water Restrictions" is available on our website: www.srhs.com.au/Articles.html

Wine Industry

Severe spring frosts in the SE of South Australia, Yarra Valley and some other districts have significantly reduced winegrape crops there. The drought and removal, or mothballing, of many un-contracted vineyards in the Riverland and Sunraysia will further reduce the industry crop for 2007. As a result some commentators are predicting a significant reduction in surplus wine stocks that might bring the supply/demand position back towards balance. However this will not help growers affected by the adverse seasonal conditions.

Almond Industry

Plantings of almonds are continuing at record levels in the Sunraysia/Mid Murray area, NSW Riverina and the Riverland. The interest in almonds has been fuelled by high prices in recent years and there has been a situation where supply levels and prices have increased at the same time.

The new plantings have put enormous pressure on the nursery industry and the ABA budwood scheme to supply enough good quality trees for the expansion in plantings. Similar increases in plantings have been occurring in California also, but at a much greater scale than in Australia.

The water restrictions in 2006/07 are having a tempering influence on developments as the availability and price of water has changed in response to the drought.

Environmental Risks

'Environmental risks' encompasses an ever-broadening range of issues that must be considered within vineyard and orchard management programs. A recent issue that has been attracting attention overseas is that of 'Food Miles'.

Some consumers are making food buying choices based on the distance food is transported to market and the effect on the ozone layer from vehicle emissions. However, a recent paper showed that more emissions resulted from consumers driving to the supermarket than from the food delivery transport system.

MAJOR PROJECT WORK

Mildura Horticultural Industry - Value-Adding & New Enterprises

Scholefield Robinson Mildura was recently commissioned by the Mildura Rural City Council to undertake a study into opportunities for value-adding and regional diversification to improve the competitiveness of our major horticultural industries. The project addressed strategies to reduce production costs, value add to products, improve the management of the supply chains and consider new crops and enterprises for the region.

Living Murray

Scholefield Robinson and EconSearch are working on a Living Murray project for DWLBC (SA) to recover water for environmental flow from water use efficiency measures on farms. The seasonal conditions are not making this project an easy one but

the long-term benefits to the river seem to be well understood by most irrigators and we are confident that some of the targets can be met. The National Water Tender is another program seeking to acquire water for environmental flow.

Yarra Valley Irrigators' Survey

During October and November, Scholefield Robinson was engaged by Melbourne Water to carry out a wide consultation with irrigators in the Yarra Valley, to gauge their responses to water restrictions and stream flow management plans for the region. This required an extensive number of interviews, at last count well over 400.

Almond Leaf Tatter Trial

Prue and Lucy are still investigating the almond problem in the Northern Adelaide Plains, called "Angle Vale Leaf Tatter" (LTD). The funding from HAL and Almond Board Australia has allowed another season of trials to be established at Angle Vale and in the SARDI greenhouses. They have also undertaken some scanning electron microscopy in order to more accurately view and define the nature of the damage. It is hoped this will give some insight into the likely cause/s, which at this point still remain unknown.

Indigenous Vineyard & Winery Review

Stuart Pettigrew recently undertook a joint project with Armstrong Muller Consulting to review the operations and viability of Murrin Bridge Wines, the only indigenous vineyard and winery in Australia, based at Lake Cargelligo, NSW. This project required consultation with a number of government and private stakeholders.

Almond Nursery Risk Analysis

A new project contracted by Almond Board Australia started in early December with Prue and Pat Barkley (citrus nursery expert) teaming up to investigate all aspects of almond planting material – from import to distribution. The project will be a comprehensive review and risk analysis of the processes involved in sampling, testing, evaluating and handling, of propagation material through the supply chain. The outputs of the project will be management protocols for the Monash facility and protocols for use by the industry in their development of a nursery accreditation scheme.

SCHOLEFIELD ROBINSON HORTICULTURAL SERVICES PTY LTD

ADELAIDE OFFICE

ACN 008 199 737 ABN 63 008 199 737
118A Glen Osmond Road, Parkside SA 5063 Australia
PO Box 650, Fullarton SA 5063
Ph: (08) 8373 2488 Fax: (08) 8373 2442
Email: srhs@srhs.com.au

Web Site: www.srhs.com.au

SCHOLEFIELD ROBINSON MILDURA PTY LTD

ACN 097 351 196 ABN 73 097 351 196
101A Ninth Street, Mildura Vic 3500 Australia
PO Box 1446, Mildura Vic 3502
Ph: (03) 5023 4644 Fax: (03) 5023 5814
Email: srm@ncable.com.au

Threats to Nut Industry

In August, Prue McMichael completed a project for Plant Health Australia (PHA) and Horticulture Australia Ltd (HAL), entitled: "Identification and Analysis of Pathogen Threats to the Nut Industry". The final report includes comprehensive tables of disease-causing organisms for almonds, hazelnuts, pecan, pistachios, macadamias and walnuts. The exotic threats were identified and rated according to their potential for entry, establishment, spread, and economic impact on commercial hosts.

For further information contact Prue McMichael at our Adelaide office, or Dr Ryan Wilson, Plant Health Australia.

GLP Spray Residue Trials

In December Scholefield Robinson will begin work in conjunction with Agronico Research as Principle Investigators for GLP (Good Laboratory Practices) spray residue trials. Data collected from the trials will be used for the issuing of minor-use chemical permits for various crops. This is a new service that Scholefield Robinson can now provide for clients.

OTHER ACTIVITIES

Winegrape Quality Project

Scholefield Robinson Mildura continues with its research into objective winegrape quality measurement and development of a relationship between grape characteristics and wine composition, particularly colour and tannins. This project is currently funded by the ARH Australian Wine Company.

Contract Disputes - Wine & Chicken

During 2006, Charles Drew has been engaged to resolve disputes in the wine and chicken meat industries.

He was engaged by McGuigan Simeon Wines Limited (MSWL) and about 150 growers to provide an expert determination regarding the 2006 vintage. Specifically, he was required to determine whether the Vintage Price Advice notified by MSWL to growers in the Riverland and Sunraysia was reasonable when considering the markets for MSWL products. In the chicken meat industry, Charles was engaged to mediate between a grower and processor under the new Chicken Meat Industry Act (SA) (2004). The skills necessary for these dispute resolution procedures are relevant to a wide range of horticultural and agricultural industries.

Spray Risk Management Seminar

Fosters Wine Group vineyard managers, considering their spray programs for 2006-07 and beyond, recently took a look at the future drivers for spray programs out to 2015.

Alison MacGregor from our Mildura office summarised the issues as being driven by a) growers knowledge and available resources; b) emerging information about biological impacts; c) customer and community expectation; and d) legislation. Amongst the most current issues influencing the spray

program are the fact that a widening group of agrochemicals are implicated as having sub-lethal effects on non target species. Spray drift is another issue which has significant implications for spraying in viticulture and horticulture.

NVHSC

Prue McMichael has continued to serve as the National Vine Health Steering Committee's Secretariat. The NVHSC actively seeks to advance vine health management at the national level and in 2006 they have updated the National Phylloxera Management Protocols; considered the Grapevine Leaf Rust eradication program and research, provided impetus to the states for harmonisation of legislation relating to phylloxera; encouraged industry training in Plant Health Australia's initiatives; considered the case for a national vine register and responded to Biosecurity Australia on their proposed changes to the import conditions for California table grapes.

Soil pH Project

Scholefield Robinson is currently conducting a project, funded by GWRDC, investigating soil pH changes in drip irrigated vineyards. Soil samples have been collected from drip irrigated vineyards in the major winegrape growing regions of Australia including Hunter Valley (NSW), Murrumbidgee Irrigation Area (NSW), Central NSW, Eastern Vic, Western Vic and Margaret River (WA).

SERVICES

Analytical Services

Many of our clients are aware of the technical and analytical services that Scholefield Robinson provides including soil and plant analysis and interpretation. Some clients may not be aware of the "other" analytical and technical services we provide including:

Bud fruit dissections

Conducted by Lucy Pumpa at our Adelaide office, bud dissections are proving to be valuable management tools when pruning vines.

Soil surveys

Amanda Schapel at our Adelaide office is a qualified soil surveyor and is able to provide soil survey services to clients. Amanda has also been recently involved in several EPA monitoring soil surveys.

Checking if your water application rates are right for your vineyard

Soil pits strategically located next to vines in the mid row will let you know just how deep the vine roots are, the distribution in the soil and if your current irrigation practices are placing the water in the right zone. If you would like to check how your vines are growing, contact Amanda for more information.

Nematode & plant disease diagnostics

Scholefield Robinson are able to assist with nematode and plant disease diagnostic tests. Dr Prue McMichael is our resident plant pathologist and is always willing to help with potential plant disease problems.

Water analysis

Scholefield Robinson are able to provide expert advice on water quality issues.

If you have a query or test you would like to discuss, please do not hesitate to contact our Adelaide office.

STUDY TOURS



Phylloxera Study Tour - France & Spain

Mary Retallack took part in a viticulture study tour of France and Spain in late August, organised by the Phylloxera and Grape Industry Board of South Australia (PGIBSA). The tour visited the La Rioja and Penedes regions of Spain, and the Languedoc, Montpellier and Bordeaux Wine Regions of France. The purpose of the tour was to expose Australian grape growers to the wine industry in France and Spain and to some of the technologies employed and issues being managed in these regions. A full copy of the report is available by emailing: mary@srhs.com.au



California and the Deep South of US

In July and August Peter Scholefield recharged his batteries with a study tour to the US. He attended the annual conference of the American Society of Horticultural Science in New Orleans, Louisiana, and caught up with the latest trends in nut production in northern California and the San Joaquin Valley. Two highlights of the conference were a symposium on Intellectual Property Rights for horticultural varieties, and a workshop on Nutrient Management in Organic Production Systems. In California almond and walnut plantings are expanding rapidly. There are 100,000ha of non-bearing almonds with plantings continuing. The Californian almond industry is valued at US\$2.5 billion annually.