

Facilitating a Vegetable Industry Development Service for Northern Australia

Richard Ross
Queensland Fruit and
Vegetable Growers

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Vegetable Industry Development Service – Northern Australia

(June 2003)

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The goal of this project was to identify what the vegetable industry in Northern Australia needs in terms of information and technology to be profitable, sustainable and market-driven; and facilitate, coordinate and instigate processes to allow those needs to be met. This final report outlines the achievements of this project and details how this goal was reached.



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MEDIA SUMMARY

Industry development is the continuing strategic management process used by industry to enhance its current level of capability and performance to higher levels of capability and performance, through overseeing the initiation, management and delivery of programs, projects and services.

The Vegetable Industry Development Service (VIDS) – Northern Australia was initiated in response to growers wanting their research and development dollars spent on work they wanted done, and access to work they have already invested in. The main project goal was therefore to identify what the vegetable industry in Northern Australia needs in terms of information and technology to be profitable, sustainable and market-driven; and facilitate, coordinate and instigate processes to allow those needs to be met.

Unlike other states of Australia, Queensland employed two Vegetable Industry Development Officers (IDOs) to undertake this work. The focus of one of the IDOs has been Research, Development, Extension & Communication; the other IDO has focussed on Market and Business Development.

Nine production areas of Queensland, two production areas of the Northern Territory, and two areas of Northern New South Wales comprise the target region. This represents a significant proportion and geographic distribution of Australia's vegetable production.

The VIDS project was also designed to develop and facilitate sub-projects that would enhance the performance of vegetable-growing businesses through motivating information and technology information and take-up, and through motivating continuous improvement.

As a result of these two positions, the real industry benefits of this project have been as follows:

- more inclusive participation of growers and other industry stakeholders in determining R&D priorities for levy investment and industry priorities
- increased access to R&D and other information
- identification of what needs to be addressed to ensure the industry moves forward – and the project has initiated and implemented services to start addressing these issues
- initiation of services such as Market and Business Development Application Service, Future Focus, Market Opportunities for Business, Trade Missions, Groups for Profit, and Market Development, have increased assistance to growers in developing opportunities and better power in the market place being able to address the high priorities of the industry that focus on market development
- identifying training needs and assisting in the organisation of this training to vegetable growers.

Introduction

This project was developed in response to a recognised need in the Australian Vegetable Industry that more inclusiveness and participation from stakeholders is vital in ensuring Research, Development and Extension (R, D&E) activities are focussed to meet industry needs.

The vegetable industry also recognised the need to improve communication within the industry, and the need to foster greater grower ownership and participation in developing vegetable industry goals and objectives. They felt the need to foster a sense of ownership for the research, leading to increased implementation of results.

This project sought to coordinate R, D&E activities to meet the needs of users, providers and disseminators, in order to maximise the available resources and the benefit of the research. The strategy aimed to build a sense of identity and community to help lift the performance of the whole vegetable industry to be delivered through a national network of agreed and coordinated programs and projects.

The Vegetable Sectional Group Committee (VSGC) of Queensland Fruit & Vegetable Growers (QFVG) identified the need for development of a continuing strategic planning process to assist the development of industry priorities and issues, and to focus resources upon the industry's identified priority needs for continual industry development. Particular importance is placed upon the involvement of research users, providers and disseminators in determining priority needs, and the selection of project proposals to ensure the funding of those projects which will achieve industry's expressed goals.

The goal of this project was 'to facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable producers enabling access to the required resources for improved industry performance'.

The objectives were:

1. To determine the Northern Australian Vegetable Industry information and technological needs.
2. To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.
3. To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.

The project area was Northern Australia, which is geographically defined as vegetable production areas of Queensland, Northern New South Wales and the Northern Territory. To service the vegetable growers over this large region, two Industry Development Officers were contracted to share the role and focuses that were needed to fulfil the goal and objectives.

A number of activities and services were initiated and designed to meet the objectives. Data has been gathered for the information and technological needs assessment of the Northern Australian Vegetable Industry through the facilitation of workshops and one-on-one interviews with growers and other industry stakeholders. Market and Business Development was identified as one of the top priorities for the industry. In addition, gaps in

services and activities needed to increase producers' business decision-making skills and to develop group participation skills towards the development of Value Chain Alliances were identified. The resulting reports have been disseminated to key stakeholders and the results incorporated into the National Vegetable Industry Needs Assessment with AUSVEG.

A communication network and database has been established to work towards greater access to information and R, D& E from vegetable projects, as well as a newsletter, special interest groups and incorporation of articles into state and national magazines.

Project development and initiation has been successful in initiating 37 projects, which have obtained funding for a total of \$1,167,500. The major project areas are business planning, research (production and pre-packaging) and several alliances (export, retail, business operations, processing, marketing, QA and general grower alliances). All projects are considered to be in accordance with industry needs.

This project has provided many additional services and benefits for the vegetable industry of Northern Australia. These include:

- More inclusive participation of growers and other industry stakeholders in determining R, D&E priorities for levy investment and project development.
- Increased access to R, D&E and other information.
- Identification of what needs to be addressed to ensure the industry moves forward – and it has initiated and implemented services to start addressing these issues.
- Initiation of services such as Market and Business Development Application Service, Future Focus, Market Opportunities for Businesses, Trade Missions, Groups for Profit, and Market Development, have increased assistance to growers in developing opportunities and better power in the market place.
- Being able to address the high priorities of the industry that focus on market development.

It has also given the growers a network of people who are all working to help them improve their business and the vegetable industry in general.

Technology transfer strategy and methodology/activities

There are several strategies put in place within the VIDS project when it was originally proposed. These strategies and activities also included practical initiatives to follow. The strategies have formed the backbone of the VIDS project, with initiatives being taken up in different areas, at varying levels and successes.

This section of the final report is broken up into the 3 project objectives and discusses the impact (real and perceived) as a result of the strategies, activities and initiatives of this project.

To determine the Northern Australia Vegetable Industry Information and Technological Needs

Extensive industry participation has occurred throughout the life of this project to ensure growers and other industry stakeholders have a say as to where the national vegetable R&D levy is invested to benefit both the industry as a whole and growers on-farm.

Industry Needs Identification – Round 1

At the commencement of this project, regional workshops and one-on-one interviews were conducted in every growing region. This generated lists that were used as the foundation for planning and justifying the remainder of project activities. These subsequent activities focussed on delivering the identified needs (as per the project goal).

The first round of workshops occurred in 1999 with the primary focus of having a say in where the national vegetable R&D levy money needs to be invested to ensure a viable and sustainable future for the industry and its growers. These workshops provided a participative process to encourage ownership of industry issues and growers.

This resulted in an extensive list of needs and issues, 'List of Vegetable Industry Needs 1999', which is detailed on the Queensland Fruit and Vegetable Growers website www.qfvg.org.au. However the five main areas related to the following issues:

1. understanding and meeting consumer demands
2. improving quality and marketing
3. improving business, financial and labour management
4. improved production
5. improving transport systems.

The challenge then faced by the project team was to review the list to identify what were real information gaps and what information or services are already available that can fulfil the needs.

A report titled, An Evaluation of the Northern Australia Vegetable Industry Development Needs and Issues, undertaken by Morton Rural Advisory Services (MRAS), reviewed the 1999 needs list. MRAS concluded that by identifying the needs, the vegetable growers have the responsibility of addressing and satisfying their needs, and that to meet these needs it requires a significant personal and business commitment in time, money and cultural change. However, it is not enough to expect that growers ask for information that they do not know is available. We need to assist growers and other industry stakeholders to readily

access information and assist those business people who are either time poor or unaware of the assistance/ information/ services/ providers that are available for them.

Industry Needs Identification – Round 2

A second round of regional visits was conducted to follow up the first. The focus here was to complete-the-loop by delivering the information that was needed, and update the industry needs list. The needs list was addressed by communicating what information and services are currently available that can address the industry needs and issues. This process was very useful in ticking off the needs that were no longer an issue for growers. The information was presented in a summary format with contact details of where and who to contact for further information. From this round of meetings the issues were collated under five headings; production, quality & marketing, business financial & labour management, consumer demands, and transport.

The format of these visits was very well received and it meant that the responsibility to make contact with the information source or service was then up to the individual grower. Assistance was always offered and available to help make these contacts.

No two workshops were the same. The workshop process used varied with each region, the extent of the needs list and the discussion that took place. An important outcome was ensuring the industry was aware of what information and services are already available that can assist in meeting the needs and issues that arose in the original workshops.

This process recognised that there are weaknesses in the communication networks of the vegetable industry and encouraged growers to seek and search for information that they need. It advertised that the information is readily available and all they need to do is ask. This process resulted in ticking off many of the needs and issues that arose and a more practical needs and issues list for the industry was published. The Vegetable Industry Needs Northern Australia, 2000, is detailed on the Queensland Fruit and Vegetable Growers website www.qfvg.org.au.

While the second round of workshops and visits were valuable and beneficial for the industry, it was readily acknowledged that more needed to be done on a long term and consistent basis to ensure information flow is not only continuous but is two way.

Industry Needs Identification – Round 3

A third round of regional visits was carried out in 2001. The focus of the third round was to:

1. review and update the vegetable industry needs list (continual activity)
2. identify what services need to be targeted into the regions (cyclic activity)
3. review the modes of information access used by the industry and identify where gaps need to be filled
4. ensure that growers are accessing information they want and need, such as where their levy money is invested.

The discussions and interviews included as many members of the supply chain as practical, including growers, chemical resellers, grower association representatives and Queensland Department of Primary Industries staff. The Vegetable Program team recognised that if the industry is to move forward together, all members of the supply chain need to be included in activities and developments. Several needs and issues on the Vegetable Industry Needs

Northern Australia 2000 list were crossed off due to a number of reasons, for example, the information is now readily available or that it is no longer an issue for the industry. At the same time, issues were added and previous issues remained on the list. The report titled Northern Australia Vegetable Industry Needs and Issues December 2001, details the needs and outcomes and is available on the QFVG website www.qfvg.org.au.

Industry Needs Identification – Round 4

It was previously decided to have only three rounds of identification needs in the project, however, because the project was extended for 12 months (from June 2002 until June 2003), it was possible to review needs and issues for a fourth time.

The fourth needs identification differed from the previous three, as there was an opportunity to focus not only on the issues surrounding the vegetable industry, but also the VIDS project. This occurred because the workshops were held towards the end of the project so that comments could be sought as to future focus work for the IDO position and program.

The regional meetings were held to review needs and issues for three reasons:

1. To determine future roles and focus for the IDO program and where growers see relevance in such positions.
2. To determine what issues need to be addressed at a state level, or are QFVG related.
3. To feed into national priorities and issues that are a focus of the national vegetable industry strategic plan. Comments were sought on their relevance and if there were issues that had been overlooked.

These results were collated into the document 'Northern Australia Vegetable Industry Needs and Issues May 2003', which is also available on the QFVG website www.qfvg.org.au.

Industry Needs - adoption

The industry 'needs' information gathered was passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers Ltd, Industry Development Officers and AusVeg, to be included in industry priority lists and used when initiating projects and activities and for reviewing and considering funding proposals.

This project ensured that the needs and issues were continually communicated to the industry via mail outs, newsletters, during workshops, and on the QFVG web site. This allowed the industry to comment on the list and to use it to develop projects. However, the adoption of these issues relied on voluntary uptake by industry participants. It can be noted that the lists and issues have been quoted in supporting arguments for proposals from Queensland seeking national vegetable levy funding. From this alone, we can assume that the industry service providers are using the lists to develop and implement projects.

The fact that several issues have come up over the years, and will no doubt continue to do so, means that either there has not been enough work to date to answer growers' issues, or that growers need to understand that the reality of solving the issue may never occur.

To encourage adoption of the industry needs and incorporation into project development, a Vegetable Project Development Workshop was conducted in April 2000. Eighty

participants from the research community (public and private) worked together to review the needs list and develop projects to assist in addressing issues and problems.

The objectives were to:

- Raise service provider awareness of industry needs within the context of the Australian Vegetable Industry Development Plan.
- Provide information on how to develop an 'outstanding' funding proposal.
- Provide information on how to involve industry stakeholders in a meaningful and mutually beneficial manner in project design and implementation.
- Propose project teams and prepare action plans for the development of concept development proposals for HRDC funding.

The workshop brought together researchers and service providers from a wide range of disciplines. One of the major comments of this workshop was that those who attended the workshop left with a better understanding and more awareness of the HAL application process and how projects are reviewed and funded. The report from this workshop is available on the QFVG website www.qfvg.org.au.

Industry Needs Identification – Nationally

In collaboration with the other Industry Development Officer projects in Australia, the IDOs developed a national vegetable industry priority list that is available through Horticulture Australia. Developing this list brought together similarities across the states and will encourage the development of more truly nationally focussed projects.

These national needs are also determined through the national HAL R&D committees. The six product groups (brassica, leafy, processing, root, export, and other) all have lists of national priorities, as well as an incorporated national list that is then given to researchers and service providers interested in gaining HAL funding for their work. These national priorities can be found in the National Vegetable Industry Strategic Plan.

The Northern Territory

The activities of this project in the Northern Territory have been different to the rest of Northern Australia. There is a large Vietnamese community in the Darwin region, which posed cultural and language barriers that this project needed to overcome in order to service this region. The team collaborated with the Northern Territory Department of Primary Industries and Fisheries and a RIRDC/HA joint funded project titled 'Pilot project on Extension and Communication with Asian Non-English Speaking Background (NESB) Vegetable Growers for the adoption of Best Practices', which appointed a Vietnamese speaking Communications Officer. Identifying the issues of the NT growers involved discussions with the NT DPIF and the Communications Officer. In addition to open two-way information flow with the DPIF and the Communications Officer, assistance was provided by this project to address some specific grower needs and will continue to ensure the QFVG Vegetable Program provide services to the Darwin region.

There has also been a move to include the Communications Officer in the Northern Territory with the IDO network, so that information flows from other states is also available to growers in the Northern Territory. This is also a benefit for other states to have a better understanding of the work being undertaken in the Northern Territory.

The VIDS project has been able to benefit the growers in the Northern Territory by initiating and developing several individual projects for the growers, including the translation of pest and disease manuals, as well as financing the development of posters highlighting information relevant to vegetable growers and production. There have also been visits to the Northern Territory to discuss the role and plan future projects, as well as Northern Territory growers and the Communications Officer visiting Queensland in 2003. This visit involved communications with the Vietnamese growing community and meetings with QFVG to determine information and marketing gaps.

To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.

The prioritisation of industry needs showed a strong trend towards market and business building rather than the traditional production focussed research that the industry has been concentrating on. However, it needs to be noted that production research is still necessary in ensuring the industry advances and stays viable.

In response to this, a number of initiatives were developed to fill gaps that existed and were needed to lift the market and business capability and capacity of the industry.

Best Practice Case Studies

The best practice case studies developed by this project focussed on providing to industry a range of studies which demonstrated that industry does have the capability to make significant change to their own, regional and national development and also provided details on the steps undertaken by commercial players to initiate change.

The projects chosen were variable in context and focus and therefore covered a wide variety of initiatives and focus, demonstrating the wide range of areas and learning styles that commercial players have in industry.

Only those case studies that industry participants agreed to share their knowledge and experiences were compiled. A number of studies were not written due to the commercial nature of the projects and competitive advantage.

Those case studies that were written and the areas of focus that each covered were:

1. Gympie Packhouse Management – Managing change; development of communication, information and financial management systems; corporate mentoring.
2. Eco-Foods - Development of innovative of farm management systems; development of networks; linking financial issues with government assistance; development and management of Action Plans.
3. Bean Handling Project – Developing networks/linkages between growers/researchers/commercial operators; financial assistance for R&D projects; identifying R&D priorities for individual businesses.
4. Kool Country Packers – Packhouse Development: Mentoring of growers to form commercial alliances; networking of growers to others in supply chain; development of a step-by-step approach towards grower packhouse development.

5. South Burnett Small Crop Growers Alliance: Forming alliances between small growers; networking; linking commercial entities with funding sources; development of 'outward' looking growers.

Case studies were written and compiled by the IDOs with the assistance of QFVG staff and were generally 2-5 pages in length. These case studies were published over time in the Queensland Fruit & Vegetable News and were made available to other industry publications including the Good Fruit & Vegetable News. Where requested, copies were made available to individual growers upon request.

Establishing the case studies in each major production region ensured relevance and understanding to most of the industry because businesses could identify not only with the location, but also to regional obstacles that they may have in common. The familiarisation should encourage adoption of best practices and key learnings.

There was in general limited feedback in regards to the industry case studies. This was not unexpected as the type of information given may have resulted in change occurring either because it was done internally and/or other agencies were consulted to provide services. What industry feedback was provided was positive and while only two projects could be directly associated with the provision of case study information, anecdotal evidence stated that it increased the awareness of the VIDS to become a 'top of the mind' information, networking and service provision service.

In future, the focus on the development of case studies may or should extend to other services provided by the IDOs. For example, "Needs Analysis Identification Methodologies" may stimulate the development of a uniformity of business practice that will result in greater efficiencies to industry.

In many cases, the best practice groups have not only identified what their current practices are, but developed projects to improve their businesses. It is fair to comment here that without the assistance and support of a commercially savvy Industry Development Officer to help identify goals, objectives and methods, and potentially write and submit the funding application and put the group in touch with the appropriate expertise through the networks developed, many of the projects may either not have developed at the speed in which they did or would not have developed at all.

Case Study reports can be found in full in the Appendix.

The Changing Face of Horticulture & Horticulture – A New Perspective Workshops

The needs analysis processes that were conducted in the early stages of the project clearly identified the fact that industry wished to develop its skills in marketing and business development. Further it was identified that a majority of the industry were not fully aware of the business operating environment in which they participated and so were not knowledgeable of the potential opportunities and threats that faced them as individual enterprises and as an industry as a whole. Extending this further once presented with information about the 'drivers to business change', many in industry felt powerless to initiate change as they were not sure to whom they should seek assistance from. This workshop built in case studies developed by the VIDS team and other commercial projects identified by the IDOs which demonstrated the 'can do' approach to business and industry change.

Two information series were presented to VIDS target audiences across 11 regions in Queensland and in the Northern Territory and Northern New South Wales, with the first series being completed in 2001/2002 and the second in 2002/2003.

Industry participation was variable, with as few as 4 participants in some workshops and up to 52 in others. The variability in response was in part due to the number of producers in each region, the level of export focus and timing of other events.

In the second round of workshops, where possible these presentations were conducted in combination with other activities particularly those run internally by QFVG. Industry feedback commented strongly and positively about this approach as it provided a range of information in a set timeframe, something which time poor industry participants appreciated.

Most of the discrete projects conducted by the IDO, either for direct knowledge transfer projects or where assistance proposals were written originated from one or both of these presentations and so should be regarded highly in future as a means of presenting marketing and business structuring information.

Attendees at seminars and those that were followed up after events commented that the seminars provided in many instances a new perspective to the way that they conducted their own business operations. For example, some businesses commented that they introduced a new business arrangement between themselves and their wholesalers/agents which focussed on openness of communication and improved information provision in regards to timeliness, the outcome of which has been a more effective and efficient business operation. Further, as a result of these meetings, a new commodity alliance was formed which improved the negotiation/business-operating platform between itself and a leading fruit and vegetable processor. The result firstly is an improved price to growers but also a greater input in research and development programs.

Identify, Initiate and Implement Services

The industry needs identifications workshops and discussions with best practice groups and participants of the Changing Face of Horticulture and Horticulture – A New Perspective Workshop Series provided useful information and justification for the development of useful services that will make a difference on-farm and encourage growers to participate and implement learnings.

These services included Future Focus workshops, Groups for Profit, Overseas Trade Missions, Market and Business Development Service, and a Trade/Business inquiries Service.

Each of these services described above were focussed on or delivered:

- Future Focus – provided a training needs identification model whereby growers and their staff were taken through a step-by-step session of approximately two hours in length. Where training needs were identified, service providers were identified through a network of service providers as developed external of this project by QFVG.
- Groups for Profit: Was a training course containing a series of modules which was designed to provide the basic tools that growers need to have to form successful alliances. The program was initially focussed on servicing those groups that after initial assessment by the IDO had a moderate chance of successful alliance formation.

- **Overseas Trade Missions:** This service was made available to a number of government agencies including Austrade, Queensland Departments of State Development & Primary Industries, Department of Foreign Affairs & Trade whereby the IDO provided networking assistance to inward and outward trade missions. This networking assistance sought to link those potential customers with those in the Northern Australian industry with the capability (human and physical) to realise any new business development opportunities that may exist. In certain instances this resulted in linkages being established with other states.
- **Marketing and Business Development Service:** This service operated entirely by the IDO focussed on providing a range of services including capability assessments (for alliance and group formations), linking of customers with identified training needs, networking service between industry and others in the supply chain on a broad range of topic areas and where applicable an application writing service.
- **Trade/Business Inquiries Service:** The Northern Australian project particularly in the early stages undertook an extensive supply chain awareness program where it was identified that others in the supply chain needed assistance to link with producers in the most effective and 'compatible' manner possible. As a result, this service was called upon frequently by producers wishing to identify linkages beyond the farm gate and vice versa from businesses outside the farm gate wishing to work with producers.

To design a well-defined and workable information dissemination process to service the Northern Australia Vegetable Industry.

The introduction to information and services that are available, as was presented in the Industry Needs Workshops, was useful for the industry, particularly the growers, but was not an efficient use of resources to provide this information in an ongoing fashion. While participants may remember some content of the workshops, if they are not exposed to the information source again, or reminded in any way, they are less likely to follow it up.

Other information resources have been initiated and developed to assist in the continual provision of up-to-date information for the industry.

One-on-One Networking

Many of the calls received by the IDOs are general inquiries by growers and other industry stakeholders about contact details of organisations or where to go to access particular information. While answering these inquiries can vary from a quick conversation to having to do some research and send out information, this ability to talk to and assist growers directly with an issue is a very important one. In this role we are providing people who can act as a one-stop-shop to save the grower much time and frustration. The grower may be trying to firstly determine who is the best contact to talk to about his/her issue. This may be to determine what the problem is, and the steps that he/she may need to take to overcome the problem; or more simply to request a specific document. This service provides increased communication and collaboration between industry stakeholders.

Vegetable News

This newsletter has been the main vehicle to communicate information, outcomes and promote useful services to the industry. The newsletters were originally designed so that each edition would revolve around a central theme with specific topics. For example, Your

R&D levies at Work, Market and Business Development Service and Consumer Market Information.

More recent editions of Vegetable News have moved away from this theme-style newsletter to incorporate more of the work that is being undertaken by the Vegetable IDO. This was because the original design was not targeting all of the grower interests and was not R&D focussed. The other reason was a result of growers in the 3rd round of workshops commenting that while they knew about Vegetable News, they could not recall any of the articles/ issues.

Regular articles in the current newsletter include:

- websites of interest
- R&D projects available
- calendar of events, conferences, workshops, grower meetings
- industry news, including national information available to growers
- IDO activities to date – attendance at national and state conferences & meetings, grower visits, etc.

In this way the growers are made aware of a wide array of information available, and activities going on around them. For further information they contact the Vegetable IDO so that growers are getting more involved and making contact with the IDO. Where necessary though, contact details for relevant researchers or stakeholders are given.

These newsletters are sent to all vegetable growers and industry stakeholders, including other Vegetable IDOs, researchers and service providers, agents, Farmbis coordinators, HAL program managers and interested parties.

These newsletters are available on the QFVG website www.qfvg.org.au and in the Appendix. Dissemination of the newsletter was as an insert into the QFVG 'Fruit and Vegetable News' magazine, with four editions published annually. This changed, with one edition being published per month, as the amount of information relevant for the newsletter was always available. Another reason was to promote the newsletter as an important tool in their knowledge and information gathering, and it was anticipated that growers would use the newsletters as a resource for information. The newsletters were also sent directly to vegetable growers, instead of previously as an insert in the magazine, because it was seen as important for the newsletter to be viewed as a separate document, and it gave the opportunity to send other information with the newsletter, such as surveys.

An informal evaluation of the newsletter during the third round of industry needs visits showed that the growers could recall the newsletter and often looked through it, but most could not recall any particular articles or editions. With the changes to the format and the variety of articles, there are growing numbers of growers inquiring about the information outlined, and requesting information as a result of Vegetable News. It is likely that most industry newsletters received would reveal similar results – some growers get more out of the information received than others do.

Industry Publications

This project has regularly contributed to industry publications, namely Queensland Fruit and Vegetable News and Good Fruit and Vegetables Magazine.

Monthly articles to Queensland Fruit and Vegetable News have provided the industry with up-to-date research outcomes and feedback from the activities of this project. Information about various conferences, training opportunities, meetings and other activities that have either involved growers, or are of interest to growers in Queensland have also been written about. The reason for utilising this magazine has been as a result of surveying growers and how to provide information that they will read. The QFVG Fruit and Vegetable News has been seen as a great source of information for growers in general. In this way Vegetable IDOs have undertaken to have articles published in each edition.

The Good Fruit and Vegetable Magazine has a section titled the 'Vegetable Platter' that all Vegetable IDO projects can contribute to. While feedback from growers in Northern Australia identified this magazine as one of the most popular, they could not recall this column. The magazine also has input from Horticulture Australia on research outcomes of various projects being carried out around the country, so it is seen as a great source of information for growers.

Vegetable Update Database

This project initiated the Vegetable Update Database. It is a web-based database that is designed to serve two main purposes:

1. To store and manage the vast array of information and services that the Vegetable team come across.
2. To provide a user-friendly mechanism to collate newsletters and information bulletins using the information that is stored in it.

The information is in a summary format with contact details of where to go for further information. This format is in response to industry preferences and the categories reflect the array of information requested in the industry needs identification workshops. The web address is www.qfvg.org.au.

The database is of benefit to the Vegetable team, to sort and file all information that crosses their paths. Every piece of information can be documented in some way with links to websites, documents, and other research and contacts, makes it a useful resource for growers.

Providing useful information on the web page is also to encourage growers to use the Internet. The underlying theory was that they are more likely to use it if there is something useful there to look at.

The database was launched in February 2002 by disseminating an edition of Vegetable News that outlined and explained the database. Since then there have been continual reminders to growers and industry of the database's existence. In this way the vegetable pages of the QFVG website are seen as a first point of call for growers searching the web.

While there were initial teething problems when the database first went online that needed to be sorted out, there has been positive feedback from those who have used the database, including interstate growers and stakeholders. Such comments as the benefits of being able to include web links, attach documents, and links to other similar information when searching the database have all been highlighted.

Another positive comment was the advantage that the grower had, knowing that his search would result in concrete information. This information may be in the form of a research

document, contact details of an expert in the field, or a website to follow up, so that growers could get their hands on the information that they were chasing.

Northern Australia Vegetable Communication Network

A communication network was established in response to the communication needs identified in 2001 to assist in the dissemination of information to the industry.

The objective of this network is to get information out to key industry players so that they can assist in keeping the vegetable growers informed and up-to-date with the latest developments. These key players include researchers, agricultural consultants, key growers, association secretaries, and other QFVG staff. The list of recipients is always growing. This network operates by e-mail and provides a two-way flow of information. As the Vegetable IDO receives information, an e-mail is sent to those on the communication network to advertise this information. If anyone on the network is interested, they reply to the information and it is sent, if not, they delete the e-mail and carry on with their day.

The sort of information that is sent through the communication network include – R&D Horti Bits newsletter, GMO – Guiding Meaningful Opinions newsletter, Thrips & Virus WFT newsletter, information on permit applications and status, information on conferences and workshops, etc.

There has never been a formal evaluation of this communication network, however while the number of people involved in the network increases, and there are continual replies seeking information, it is assumed that the network is continuing to meet its initial objectives.

Special Interest Groups

Modelled on the Communication Network idea, there have been several Special Interest Groups, or SIGs set up. This is as a result of continually improving our ability to directly target specific information to various groups of growers. The SIGs that have been initiated to date include

- Hydroponics
- Greenhouse
- Quality assurance
- Environmental management
- Training
- Organics
- Women in horticulture – still establishing
- Young growers – still establishing.

These SIGs were a result of information received from growers as part of the Vegetable Industry Survey 2003. Growers who returned the surveys highlighted the areas of information that they wished to receive when available. As a result, to be involved in the SIGs, growers need an e-mail address or a fax number. Information is e-mailed or faxed when received, and it is the grower's responsibility to reply to the information if interested. If not, the e-mail or fax can be discarded, and growers can continue on with their work.

There is a process at present to engage other growers who have not returned surveys to have a chance to be involved in the SIGs. This includes reviewing the database of those growers who have shown interest in the past, as well as further advertising of the SIGs, to encourage growers involvement.

Vegetable Links

While trying to encourage vegetable growers to become more comfortable with using the Internet as a source of information, growers commented on the advantage of having a central page on the QFVG website where useful websites could be posted for them to visit.

This has been done with new sites being added continually. At present the sites are listed under several headings, incorporating HAL R&D committee groups and specific industry issues. These include:

- Research, Development & Extension
- Trade and Statistics
- Production
- Industry
- Media
- Brassica
- Leafy
- Root
- Other
- Environment/sustainability
- Pest and Disease (IPM)
- Government
- Women in horticulture
- Training, services & grants
- Young growers.

This list has grown since its original inception, as growers become more interested in specific issues, for example, training, services and grants.

In the future it is envisaged that the Internet and electronic communication will become a key role in further Industry Development. This is because of the speed and cost involved in getting a wide variety of information out to a wide range of the community.

Evaluation and measurement of outcomes – impact and adoption

The VIDS Project goal is defined as:

To facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable producers enabling access to the required resources for improved industry performance.

It is important to consider this goal when evaluating this project and the impact and contribution to industry development that this project has had on the industry at both a state and national level. There has definitely been an increase in grower participation as this project progressed, including acting as R&D delegates, growers attending workshops for interstate project work, conferences, study tours, and priority setting workshops in their own states. Having a Queensland representative in the form of an IDO and R&D delegates who are able to attend national and interstate meetings, and be on steering committees, gives Queensland growers a chance to have access to information from interstate, interstate case studies, as well as access to researchers.

As this project has been the platform for initiating the development of other projects and services that will benefit the industry, the impact can be difficult to measure. Often, uptake of results and outcomes from activities relies on voluntary actions of other industry stakeholders. The VIDS project has been able to increase the amount of participation from stakeholders, and as there is a move in the industry to more private consultants, it is positive to see the involvement that these groups of key players have with the Vegetable IDOs. Stakeholders are involved in workshops, evaluations and feedback, as well as in all communications from the Vegetable IDOs.

Throughout the course of the VIDS project, evaluation has been a key indicator of success as well as a guide for focussing on issues growers have raised as a result of the project and its work. For example, every R&D workshop ended with evaluation sheets, and comments from one-on-one visits. These were continually fed into the cyclic project planning. An important question when looking at evaluating the last five years is - have we measured any change in attitude or aspirations?

It is also important to consider cultural and attitudinal changes across the industry as a result of this project. This has included

- increase in growers initiating contact with the IDO
- growers suggesting ideas for ways in which to improve the industry or specific issues
- getting involved in the MBDS
- growers accessing more funding sources
- growers accessing and taking advantage of other projects that have been acknowledged as important by the VIDS project (this would specifically include the Water for Profit Scheme, and Pest Management Program both managed by QFVG)
- growers actively seeking answers for themselves.

Independent Evaluations

The Rural Extension Centre (REC) at Gatton was involved in providing two independent evaluations of the project. The first interim evaluation was in June 2001, and was designed to establish that the project was working to plan and objectives. This report titled 'Vegetable Industry Development Service (VIDS) Project VG98121 – Interim Evaluation'. This was performed by desktop analysis of material provided by the VIDS project team.

The report highlighted seven key recommendations for the VIDS project. These recommendations are outlined below with comments on how these recommendations have been taken into the planning of the project since this time.

Interim Evaluation Recommendations

The Interim Evaluation resulted in 7 recommendations for the VIDS project.

- 1. For an adequate evaluation of increased knowledge and awareness, reactions and practice change, a more extensive evaluation is necessary, involving direct responses from the industry participants.*

The REC was consulted to provide the evaluation for what was to be the final year of the project. So in July 2002 the report ‘Vegetable Industry Development Service (VIDS) Project VG98121 – Interim Evaluation’ was prepared. The objectives and method for this evaluation differed from the first evaluation, as it was aiming to evaluate the effectiveness of the VIDS project outputs and activities at the grower level and to provide recommendations for future direction of the project. Surveying growers who had been involved with the Market Business and Development Service (MBDS) initiated by the VIDS project, as well as the VIDS project did this in general.

- 2. The need for an economic analysis of the Northern Australian Vegetable Industry to be completed.*

An economic analysis was to be completed as part of the original project proposal. As a result of this Moreton Rural Advisory Service (MRAS) prepared “An assessment of the financial benefits of market capability and business building for vegetable growers in Northern Australia” June 2002.

- 3. That more attention be given to the marginal regions – the Northern Territory and Northern NSW appear to be less serviced by the VIDS project than Queensland regions.*

This issue is still being addressed, in particular the Northern Territory, where there have been requests from the Territory to have an IDO based there full-time. This proposal rests with Horticulture Australia, and will affect the change in geographical responsibility for the Northern Australian IDO.

- 4. The use of the term ‘Northern Australia’ rather than ‘Queensland’ should be used for general material.*

The term Northern Australia is now used on all written formal material.

- 5. There is a lack of clear identification or ownership of the services and activities provided under the VIDS project. It is recommended that the services and activities provided under the VIDS projects should be clearly identified as such.*

Branding of information provided by the IDO is still somewhat ambiguous as to its ownership. This is as a result of confusion and badging between AUSVEG, Horticulture Australia and the state association, QFVG. While the most important aspect is that growers obtain information and as a result improve their business and industry, for accountability and quantifiable benefits of projects such as the VIDS project, it is important that growers know what their IDO has done for them. This issue remains one that needs to be worked on

in future projects. It is also important that growers realise and know where their R&D levy is invested.

6. *All activities involving industry participants should be evaluated to provide ongoing monitoring of the activities for improvement of delivery and further identification of industry needs.*

Industry comment is continually sought in the form of grower comments, feedback after meetings, newsletters and other forms of communication both informal and formal between the IDOs and industry, and can be used to improve the project.

Evaluating participants at industry activities to provide a more continual form of monitoring and greater involvement of participants.

7. *Reports from VIDS project case studies should be disseminated to industry participants to assist the up-take of improved processes and practices, and provide an impetus for improved industry performance.*

Awareness building associated with the use of VIDS project case studies were completed using a number of mechanisms. These included:

- Queensland Fruit & Vegetable News
- Good Fruit & Vegetable News
- inclusion on the QFVG website, www.qfvg.org.au
- presentation and discussion of results at industry awareness seminars
- general discussion and presentation of information at one-on-one and small group events.

Final Evaluation Recommendations

The REC also prepared a final evaluation on the VIDS project in July 2002.

The key recommendations that came from this evaluation differed from the interim evaluation and focussed more closely on communication. Highlighted below are the recommendations and comments relating to how these have been addressed since this date. These have been addressed because the project was granted an extension. If this had not happened, several of these recommendations would not have been addressed adequately, if at all.

1. *Greater interaction with other industry service providers be utilised to broadcast the services and activities of the VIDS project available to growers.*

The issue of branding VIDS initiatives is still an issue and one where there has not been a result as yet. In terms of greater interaction with service providers, this has increased through collaboration with QDPI, Farmbis coordinators, Local Producer Associations, and key growers in regions. The use of Rural ABC Radio and local newspapers has also been used more to advertise regional workshops and meetings.

2. *Continual update and promotion of the Vegetable Update Database for the industry as this service has the potential to deliver the desired outcomes of the project in terms of provision of up-to-date and targeted information.*

Promotion of the Vegetable Update Database occurs on a regular basis through articles in the 'Vegetable News' as well as the QFVG Fruit and Vegetable News. Growers are also encouraged to visit the database when searching for information on the Internet. There has been an increase in the information being accessed and requested from the database, both in Queensland and interstate, and across all players in the supply chain, including people searching for information for educational purposes.

3. *Other means of information access needs to be explored for growers who do not have Internet access or wish to use the Internet.*

While this recommendation has not been addressed as yet, it is also important to note the role that computers and the Internet are going to play in future business. While it is important not to disadvantage those growers who do not have access to the Internet, it is important to encourage them to consider this as an important business decision. At present those growers who do not have access to the Internet are able to contact the IDOs and information will be produced in hard copy.

4. *The MBDS is highly recommended as a service that should continue to be promoted and implemented as the service is delivering on the desired outcomes of the project.*

The MBDS has been viewed by industry (including those in the production sector and those outside) as a valuable resource. This has been evidenced by the number of general inquiries that are received on a weekly basis (>10 per week). The service is also viewed as a credible agency for the provision of project specific assistance where a range of technical/commercial focussed services are required.

It appears that the MBDS provides a valuable bridging link across a wide range of industry participants, particularly in combination with an industry organisation such as Queensland Fruit & Vegetable Growers Ltd, which allows the MBDS to more easily gain a profile.

A frequent comment from those who accessed the service, was the high regard placed on the ability of the MBDS to provide a commercially focussed service that was able to link with others to provide knowledge/service.

Further evidence of the value that industry places upon the MBDS (the principal service delivery mechanism provided by Shane Comiskey IDO) is the overall value of service rating of 7.5.

5. *Regular reporting of the projects undertaken by the MBDS should be disseminated in the relevant industry publications*

In many instances the nature of the service delivery did not necessitate the regular reporting of inquiry/service outcomes. The specific information used to provide these general services have been logged onto files for future reference.

Specific projects, the processes used and outcomes of these projects have been extended through the compilation and dissemination of case studies.

Information from projects were also provided as inputs into a series of publications including Queensland Fruit & Vegetable News (as regular contributions), Vegetable News and Good Fruit & Vegetable News. Other information was provided for the QFVG website, www.qfvg.org.au.

In certain instances, due to the highly commercial nature of some projects, specific project reports were not made available as general information at the request of the project participants.

6. *As newsletters appear to be the most favoured means of communication by the growers, it is recommended that a specific VIDS project newsletter be disseminated. The current 'Vegetable News' could be renamed for such purpose.*

This recommendation has been addressed and at this stage the improved 'Vegetable News' continually received positive feedback from industry.

7. *All presentation material used when delivering to people from non-English speaking backgrounds should be translated and evaluations of the activities should be undertaken. This is seen as being of particular importance in the Northern Territory region.*

Work is being done with Farmbis and a national Bislink project at present to improve information being able to be accessed by non-English speaking background growers.

While all recommendations have been highlighted here, and some more thoroughly addressed to date than others, these recommendations as part of the independent evaluation report are consistent with industry feedback and personal evaluations from the Vegetable IDOs. The moves to address and change several of these recommendations follow what has been planned in this project.

Internal Evaluation

To take advantage of the 12-month extension of the project an internal survey was prepared. The Vegetable Industry Survey was sent to every vegetable grower with an edition of 'Vegetable News'.

In summary, the findings showed that there was a good awareness of the IDOs and the activities that they undertook with an overall approval rating of the quality of service that was provided by the VIDS of 7.4 (out of 10). Industry provided a rating of 7.6 (out of 10) in regards to the importance of the IDO service to industry.

This study confirmed that the IDO services were regarded highly and provided a high quality of service. Further, the ability of the IDO service to provide information across a wide range of industry issues was required and therefore supports the strong networking role undertaken by the IDO team, particularly in regard to ad hoc inquiries. The full report is found in the Appendix (Evaluation Reports).

Over the life of this project, growers have increased their use of the IDO services. The IDO project has led to information being more readily available, resulting in more capable and knowledgeable growers who in turn play a part in introducing a better performing vegetable industry.

The more chance that growers have to make contact with their IDO has assisted in the increased adoption of VIDS services into the vegetable regions. By preparing the needs

and issues workshops, growers and industry have had a chance to become more involved in the process, and thus have improved the adoption and involvement in the R&D process.

The impact that higher industry collaboration has had in Northern Australia revolves around the increased knowledge and increased understanding of where knowledge can be accessed. This new knowledge has resulted in better business skills, higher profit and greater sustainability within the industry. It should be acknowledged that the VIDS project cannot take sole responsibility and credit for advancements and improvements within the vegetable industry over the past few years. The VIDS project has been able to play a leading role in both

- improving collaboration between growers, government agency staff, private consultants and other players in the supply chain
- improving understanding of national levy and R&D processes

Management Committee Evaluation

The Vegetable Industry Development Officer project has provided immense benefits to growers in Queensland and other areas of Northern Australia.

Vegetable growers are keen to improve their production technique, productivity and profitability. To do this, they need access to information in a user-friendly format.

The Vegetable Industry Development Officer program has facilitated extension of results of Research and Development projects to growers in a way in which they can understand. This has enabled ready evaluation and adoption of research and development outcomes by growers across the industry. This ensures greater benefits are derived from both industry and government investments in research and development.

There are other less tangible benefits that flow from grower involvement in the research and development extension process of the project. Primary amongst these is a greater willingness to talk to other growers to work together in groups.

These are important outcomes, as Australian vegetable growers need to develop more coordinated cooperative approaches if they are to be globally competitive and be sustainable into the future.

There has been strong acceptance amongst growers of the vegetable industry development program. Growers generally appreciate the information and support that is provided through the program, not only through information and extension activities, but also through the network and business opportunities which have resulted from the program activities

In general, most growers who use their IDO and have a relationship with this person have valued the services provided by such a position. Growers who have not become involved with the IDO have commented that it is because they simply feel that they don't need to, not because of the service provided or the role of the position. A goal for the future is to highlight how these growers would benefit from making contact with their Vegetable IDO.

It is also important that at a national level, this project and positions of IDOs are also reviewed and evaluated. Horticulture Australia undertook a National Industry Development Officer Review in 2002; results of this report are not yet published.

Discussion

To determine project success and impact on the vegetable industry in Northern Australia as a result of the VIDS project it is important to re-assess the project objectives:

1. to determine the Northern Australian Vegetable Industry information and technological needs
2. to initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants
3. to design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.

The Industry Development Service – Northern Australia - has contributed towards building the profitability and economic, social and environmental sustainability of the Australian vegetable industry through the facilitation of projects that have delivered targeted information and technology. These have enhanced the performance of vegetable-growing businesses, through motivating information and technology take-up, and through motivating continuous improvement - goals shared with the Australian Government and the Australian vegetable industry through the national research and development levy.

Needs for information and technology transfer, peer group expectations, and other motivations, have been captured and employed to influence business decision-making and actions, which lead to better performance. There is a need to continue these influences, thus increasing better performances.

Group activity has been an integral part of the project leading to specific-purpose best practice group development.

This project integrated with the national industry development network in responding to the Australian Vegetable Industry Plan. This needs to be refined and continually re-assessed so that growers understand the ideas involved in the strategic planning for the industry as a whole, and how their business fits into it.

Needs and issue workshops also gave growers the chance to consider the type of information that they may never have considered important relevant to their business. In this way, not only were needs and issues highlighted, but also new areas of information and research were shown to the growers. These new ideas were stimulated due to the fact that the growers had a platform to consider the vegetable industry as a whole, and not just their individual businesses.

There have been difficulties with obtaining needs identification because being able to encourage people to think beyond problems that they are facing today, or this season, is often difficult. This is especially difficult when attempting to work with the national R&D committee to focus on the industry at a strategic level when determining priorities. Many growers 'don't know what they don't know' and therefore exposure to external information about other sectors, states, countries and supply chain participants potentially improves their ability to provide more positive input into needs analysis.

Growers also worked well when they were not presented with a clean slate – give them a couple of suggestions to get them going. This will result in them either agreeing and

providing further thoughts, or disagreeing and highlighting what the issues should be replaced with. It also helps for those growers who are not as open and confident with themselves.

During the life of this project there have been four rounds of needs ID visits. There are several questions that need to be asked, to determine the effectiveness of this process:

- Have there been fewer issues each visit? Is this due to the process used?
- What other reasons could account for this?
- Is it because this project is making information more available?
- Are issues from 2 years ago no longer high on priority lists?
- Have issues facing the vegetable industry changed over the last few years at all?

This project has provided information to growers, and made people more aware of what is going on in their industry and the opportunity they have to become more active in its future. However, some of the biggest issues facing vegetable growers in Queensland and across the country are issues that at this stage are very difficult to solve, including transparency of the supply chain.

The identification and priority setting workshops help to bring back to focus what is important to be working on. It is a reminder for representative organisations of their core focus, and what they should be working on, as well as for national bodies to remember that sometimes it is the littlest problem that can snowball into huge industry-wide issues before they are dealt with.

The workshops and visits are important, not only to gather the information but to meet with growers and industry stakeholders. Growers don't expect to be visited continually by their state IDO and understand that there is one person trying to coordinate and manage a thousand growers around the rest of the state. However the opportunity to put a face to a name, to meet the person that you speak to on the phone, who sends you information and newsletters on request should not be undervalued. Industry meetings also result in greater acceptance of industry by participants and increased knowledge of the IDO about regional and community issues many of which vary greatly across regions.

It is often difficult to quantify the value of a visit to a region. Over the lifetime of this project it has been budgeted for two visits to each region annually. This has been seen to be sufficient, as while growers enjoy being able to have the IDO in their region, they also realise that this visit must have meaning, and that there is no point in having a visit just for the sake of it.

Despite services offered and promoted by this project, it is still the choice and responsibility of the grower to take advantage of it and make the first steps to apply it for the advantage of his/her business. It is not a sustainable approach to take, to have someone in a position where information is spoon fed to growers. This does not benefit the industry, and certainly does not develop it in a productive way. The position is there to make growers aware of what is going on in the industry and the information and contacts that growers could use to improve their business. Growers are at different levels of success, profit, size of farm, etc, and that will always be the case, but the idea is not to do everything for the grower – but to provide a base of information for them, and suggestions of what to do to help themselves.

At a national level this project has had huge involvement with other state IDOs, staff at Horticulture Australia, AUSVEG, interstate product group delegates, and researchers. The strength of the national IDO network has been commented on over the years, and is a huge

benefit to all IDOs. The national IDO network was particularly important for Queensland, with changes in staffing during the life of this project. The national IDOs wealth of varied experience and knowledge in the industry has been a great resource for this VIDS project.

With changes occurring at a national level in relation to the R&D process it is difficult to determine if projects are now being more closely related to grower needs. However, researchers are being more closely notified of grower priorities, and there are plans to have researchers work more closely with IDOs and HA in the future to learn the importance of clear project proposal writing.

Benchmarking is important in any work. However with this project being the first of its kind in Queensland, doubled with the fact that Queensland is the only state at present to have an IDO focussed on market and business development, this project will be able to be used as a benchmark for future work. However it is evident to see the increase in grower and industry participation in the project from year one to its conclusion.

We cannot benchmark our industry knowledge on global and domestic marketing as the number of projects completed within the Changing Face of Horticulture in regards to the total size of the industry is too small. IDO information suggests that the majority of industry is behind international best practice in regards to global and domestic marketing awareness, although there are small networks that are at least the equal of international competitors operating within Queensland.

It is difficult in projects such as this to determine and measure impacts. There are no immediate effects of increased communication within the industry, but more long-term benefits. It is difficult to judge when a grower has moved away from simply considering their own business, to considering their business as part of the vegetable industry as a whole. It can also be said that this project has increased communication between growers and the IDO, between growers and other growers, researchers and across the supply chain – however how do we measure the impacts of this?

It is also difficult to determine when growers have begun to think about the long-term benefits of their levy or to know when the change of thought to consider long-term planning for the development of the vegetable industry occurred with some growers.

A benefit of this project is simply that growers now know that they can have a voice. Growers are able to make contact everyday, instead of waiting for state associations, government departments or regional councils to ask for their comments. The IDO provides a direct and real link for vegetable growers into the various areas of the industry, and can link the grower with the person best able to service his needs. This project has already determined who many of these ‘experts’ are, however it will be important that future projects continue to extend their communication and contacts to new and emerging key players in the industry.

The issue of having Northern Australia as a feasible and realistic area for one person to manage is something that also needs to be taken into consideration. Queensland differs from some of the other states with the number of growers, variety in growing seasons, climates, regions, commodities etc. It may be seen as unrealistic and unproductive to have one person managing the depth and breadth of issues and growers in the state, without adding the Northern Territory to this area. Further, industry has appreciated the development of a commercially focussed IDO network who are able to understand in

generally reasonable depth the activities of individual business/groups and to provide assistance/recommendations that result in commercial awareness/business gain.

Recommendations

Queensland has been unique within the Vegetable IDO network, to be able to have two Vegetable IDOs funded by national vegetable levies. There have been advantages in having two IDOs including:

- two IDOs with two different foci has resulted in a strong body of work being done in the R, D&E and market development sections of the industry
- greater networking opportunities
- stronger skills base
- ability to strengthen the vegetable program at QFVG with the two positions.

There have been other issues with having two IDOs, mainly being that only one attends national meetings, while the other doesn't. This has led to one of the IDOs being more strongly tied to the national IDO network than the other.

A proper communication plan for Northern Australia needs to be developed and implemented with clear outcomes and strategies for the future. This will make benchmarking and monitoring and evaluation easier and beneficial for project management. It will also ensure that the communication initiated to date is maintained and promoted especially the Vegetable Update database, Vegetable News, and SIGs. It is also important to determine if and when various strategies meet their use-by-date, and acknowledge if resources would be better served elsewhere.

MBDS roles will be successful and show benefit to the industry if there is a process similar to that which allows industry needs to be clearly identified through the needs workshops and have the provision of services guided by these needs. Further, having a person who is able to converse about the industry's market development potential establishes the credibility of the service. Another important element is to have people involved in projects who have extensive supply chain networks to draw upon and an ability to bring past commercial experience to existing projects. Having the support network of industry organisations such as QFVG also provided considerable resource experience that can be drawn upon, especially grower and communication networks.

However, the work that has already been done can be used to plan for future work – this includes the results of the final evaluation. Information can be taken from the survey results to highlight regions where IDO work has been taken up and areas where there has not been a huge return of surveys. It is important to look at this and see where more focus has to take place. The other advantage of the recent survey is that specific issues can be highlighted in these areas, so planning for workshops and training can be commenced.

The other advantage is that the growers who have been involved in the survey can be used as a reference group and committee for organising any events in their regions.

A recommendation for the future as a result of regional visits is to provide regional round-ups on a quarterly basis. Information will be provided electronically and include a simple summary on what is going on in that region, including:

- R&D work going on, both with HAL projects, DPI, universities etc
- Water for Profit program and any activities from that
- agri-policy issues (this feeds into QFVG and allows close links between grower and state organisation)
- regional meetings that are planned

- training that is planned
- specific commodity issues
- contacts – Vegetable IDO, QFVG, Farmbis, board members, R&D delegates and key growers in that region, suppliers, agronomists etc.

The regions that can be focussed on follow those regularly used at present:

- Far North Queensland
- Bowen, Ayr & Gumlu
- Bundaberg and Childers
- Sunshine Coast (including Gayndah, Mundubbera)
- Lockyer Valley
- SEQ (including Fassifern Valley, Brisbane and Gold Coast hinterland)
- Granite Belt & Darling Downs
- NSW (Cudgen and Tweed Valley).

This is in line with information being prepared and disseminated not solely on commodity based information. There will be a move in the future to not only focus on commodity information, but industry and strategic information relating to industry wide issues – water and environmental management, chemical information, labour, training, etc. It is important that while there is information available on specific pests and diseases and crops, growers are able to focus on more strategic issues facing the vegetable industry, both in Queensland and nationally.

Although this project is finishing, much of the work is continuing to progress, or in some cases has only recently begun (training courses with the Queensland Vietnamese Farmers Association). Therefore the achievements from this work are just the beginning on the road to developing the vegetable industry and the role that the Vegetable IDO plays in extending information and empowering growers for further involvement and ownership of their product.

This project has been, and will continue to be dependent upon a network of growers and service providers having a common focus of lifting industry performance through identifying needs and delivering on these needs through results delivery and take-up.

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Appendix

VIDS Project weblinks

QFVG Home page: www.qfvg.org.au

Vegetable Home page: <http://www.qfvg.org.au/members/vegetables.html>

Vegetable Update Database: <http://www.qfvg.org.au/vegupdate/default.asp>

Vegetable News: <http://www.qfvg.org.au/members/Vegetables/Vegetable%20News.htm>

Industry Needs and Issues: <http://www.qfvg.org.au/members/Vegetables/indneeds+iss.htm>

Industry links: <http://www.qfvg.org.au/members/Vegetables/VegetableLinks.htm>

Needs & Issues Reports

Northern Australia Vegetable Industry Needs & Issues

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***An activity by the Vegetable Industry Development Service – Northern
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SUMMARY

This report has been compiled to review the vegetable industry needs and issues for northern Australia and identify opportunities for the QFVG Vegetable Program to improve communication in the vegetable industry.

Semi-formal interviews were held one on one with industry stakeholders, including growers, chemical resellers, grower association representatives and Department of Primary Industry staff.

Recommendations include establishing a two way communication network with key industry stakeholders to get information out to (and in from) the industry more efficiently; better utilisation of communication vehicles that already exist eg. Fruit and Vegetable News and Good Fruit and Vegetables; ensure the issues raised are added to industry priority lists; publicise the process and roles and responsibilities that are involved in the national R&D process; include all industry stakeholders and supply chain members in the information loop to assist in information dissemination; and ensure that growers and business that are identified as requiring assistance, receive it.

INTRODUCTION AND BACKGROUND

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), Samantha Heritage, Vegetable Industry Development Officer, conducted regional visits from October to December 2001. This is the third round of regional visits undertaken as part of this project. This report compiles these outcomes and has made recommendations for further work.

Over the last two and a half years, extensive industry participation has occurred to ensure growers and other industry stakeholders have a say as to where the national vegetable R&D levy is invested to benefit both the industry as a whole and growers on-farm.

The first round of workshops occurred in 1999 with the primary focus of having a say where the national vegetable R&D levy money needs to be invested to ensure a viable and sustainable future for the industry and it's growers. This resulted in a extensive list of needs and issues, 'List of Vegetable Industry Needs 1999', which is detailed in Appendix 1.

The second round of regional visits followed up the first. The focus here was to complete-the-loop ie. deliver what is needed. Here, the needs list was addressed by sifting and sorting what information is already available, and what gaps exist that need to be filled. An important outcome was ensuring the industry was aware of what information and services are already available that can assist in meeting the needs and issues that arose in the original workshops. This process recognised that there are weaknesses in the communication networks of the vegetable industry and encouraged growers to seek and search for information that they need. It advertised that the information is readily available and all they need to do is ask. This process resulted in ticking off many of the needs and issues that arose and a more practical needs and issues list for the industry was developed. The Vegetable Industry Needs Northern Australia, 2000, is detailed in Appendix 2.

While the second round of workshops and visits was valuable and beneficial for the industry, it was readily acknowledged that more needed to be done on a long term and consistent basis to ensure information flow is not only continuous but is two way.

A report titled, An Evaluation of the Northern Australia Vegetable Industry Development Needs and Issues, undertaken by Morton Rural Advisory Services, reviewed the 1999 needs list and concluded that by identifying the needs, the vegetable growers have the responsibility of addressing and satisfying their needs as listed. But, it is not enough to expect growers to ask for information that they do not know is available. We need to assist growers and other industry stakeholders to readily access information as they are busy business people that are time poor.

The third round of regional visits was carried out with the focus to:

- Review and update the vegetable industry needs list (continual activity).
- Identify what services need to be targeted into the regions.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need, such as where their levy money is invested.

The discussions and interviews included as many members of the supply chain as practical for the focus, including growers, chemical resellers, grower association representatives and Department of Primary Industry staff. The Vegetable Program team recognised that if the industry is to move forward together, all members of the supply chain need to be included in activities and developments.

Many of the needs and issues on the Vegetable Industry Needs Northern Australia 2000 list, were crossed off due to a number of reasons, for example, the information is now readily available or that it is no longer an issue for the industry. Issues were also added. The updated needs list is detailed in this report.

The information gathered will be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers Ltd, Industry Development Officers and AusVeg, to be included in industry priority lists and used when initiating projects and activities and for reviewing and considering funding proposals.

The activities of this project in the Northern Territory have been different to the rest of northern Australia. There is a large Vietnamese community in the Darwin region which posed cultural and language barriers that this project needed to overcome in order to service this region. The team has collaborated with the Northern Territory Department of Primary Industries and Fisheries and a RIRDC/HA joint funded project titled 'Pilot project on Extension and Communication with Asian Non-English Speaking Background (NESB) Vegetable Growers for the adoption of Best Practices', which appointed a Vietnamese speaking Communications Officer. Identifying the issues of the NT growers involved discussions with the NT DPIF and CO. In addition to open two-way information flow with the DPIF and CO, assistance has been offered by this project to address some specific grower needs and will ensure these services reach the Darwin region.

METHODOLOGY

The industry visits were conducted as one on one interviews and discussions. This method was used as workshops do not get large attendances and in this case, the information required and exchanged did not need a workshop format.

To ensure accurate and consistent information was gathered, a questionnaire was developed as a guide for semi-formal interviews. This questionnaire is detailed in Appendix

3. it was not used word for word, but as a guide to ensure information needed, was gathered. However, some growers were interviewed over the telephone, and for this the questionnaire was modified to suit. In the telephone surveys many of the questions were asked outright as it was more appropriate for these conversations. The modified telephone questionnaire is detailed in Appendix 4. Telephone surveys are limited by the questions asked and it is clearly evident that less information overall was collected using this method.

In both methods, using the questionnaire relied upon individual judgement of the interviewer and responses from the participants, which often led to not all question's being answered. A general limitation of using a semi-formal interview processes is that it can often lead to not all questions being answered. However, using a formal interview process is not suitable for use in the field, and can lead to participants feeling uncomfortable.

Overall, the process used to collect industry needs and issues was not as rigorous and structured as previously used in workshops. Nonetheless, issues that growers felt were important for the industry to address were still raised and recorded.

RESULTS AND DISCUSSION

Knowledge of National Vegetable R&D Levy

There is little knowledge of how the national vegetable R&D levy is used, the processes that are in place, and roles and responsibilities. The industry wants to know what happens with their levy and the process that is used to spend it. It would be important to clarify the difference between the state and national levies that the vegetable growers in Queensland pay, as the mention of levies generally assumes that it is a QFVG levy. This lack of separation will cause confusion in July 2003 when the state levy becomes voluntary and the national levy still compulsory.

General recall of projects supported by the national vegetable levy is low. This could be because of the lack of recognition of levy contribution and knowledge of who Horticulture Australia (previously the Horticultural Research and Development Corporation) are and what they do. Unfortunately, their logo does not state that they manage or invest vegetable levy money. In addition, many of the vegetable projects managed and led by state government bodies only display their state or department logo, which makes it more difficult for the grower to identify what is and is not supported by their levy.

The format of the two documents distributed: List of current R&D being undertaken in the vegetable industry, and the Final Reports from Horticulture Australia, received positive feedback from the growers, and this is further backed up by the number of requests being received in the mail. A suggestion was made to provide a folder that growers can keep on the shelf for further reference and can easily add in updates when they are sent.

Industry Communication

The limited access (or perceived limitation) to information about Research and Development projects, services available to assist businesses and other industry information in general, seems to be a big issue among the growers.

The R&D projects and where the national vegetable R&D levy has been invested has a low recall when growers are asked about it. It is important to note that the information is not difficult to find and growers are generally aware of where to go if they want to or have the time. Establishing an information network that makes the information more readily

available to growers so they may not have to ask, could make industry adoption and uptake of new technology quicker.

Keeping local people in the loop will increase information access. Local knowledge is one of the first places to source information. It was mentioned by a number of growers that QFVG is not the first place they think to contact of when they need something.

It would be useful for the Vegetable Program to take advantage of active grower associations or other groups.

Targeting smaller regions, not just the big ones, was identified as a weakness of overall communication from QFVG, particularly when representatives or field officers visit a region or district. This was identified in regions where local producer associations are quite active. It should be noted that the sprawl of growers across and between regions in Queensland offers challenges of reaching everybody! An electronic communication network may assist communication as it is an efficient way to get information out to a large number of people at once.

There are some regions that do not have any local support such as the DPI or local resellers. These are smaller, less significant regions, such as the Sunshine Coast. However, these growers still need to know what developments are occurring. Information provided in the Fruit and Vegetable News was suggested to be the best way to get information to these growers.

General feedback about what information growers would like to receive reflected a preference for targeted information that is applicable to their crops and interests. Most of the information they receive is not relevant to their business, and they need to spend time sorting through it. However, some growers do want to know what is going on in the overall industry as they feel that it is important to keep in touch with the bigger industry picture and what new technology other crops are developing. This will need to be taken into consideration when developing a communication strategy. The growers do not want to waste time sifting through information they don't want, they would rather receive the details on where to go to access particular information, to point them in the right direction.

The number of growers using electronic communication is always increasing and as expected, the frequency of use varies. Communicating with individual growers via E-mail may not be a useful way to rely on getting information out. This is due to the generally low frequency of 'logging on' and that it is not the preferred method of growers at this stage. However, if it was used, it must not be doubled up with hard copies in the mail, as this gives the impression of waste and develops a poor attitude towards the information received electronically (and often results in the E-mail being instantly deleted).

Many important industry participants and stakeholders do not get the information that the growers receive. This information is often more useful to people servicing the growers and the target audience of any communication material distributed should be reviewed with this in mind.

It was obvious that the research community needs clearer messages and guidance as to what the funding providers priority's are. The research personnel often develop projects closely with growers and other industry participation and they are more often than not, not funded. This is frustrating not only for the research community, but also for the growers who need the work carried out so outcomes can be used to improve their farm enterprises.

The Vegetable Program needs to ensure it utilises the Fruit and Vegetable News and Good Fruit and Vegetables more effectively as they seem to be the main industry publications read.

This discussion suggests poor communication from this Vegetable Industry Development Service project, however most participants had knowledge of where to go to find information if they wanted it, which is a development that was not obvious when the project started. This is also reflected in the 3 industry needs and issues lists, as discussed in the section of this report titled, Vegetable Industry Priorities for Northern Australia. In general, growers are too busy to make the time to find information on a day to day basis.

Market Development

Developing alliances and an interest in networking, for a number of reasons, is increasing. Growers feel that the industry needs help to get into exporting, value adding, packaging and networking.

This area seems to be a natural progression many growers are exploring for themselves. However, it is evident, both from comments and personal impressions, that any assistance to help them do better business and build relationships would be appreciated.

Many industry stakeholders feel that there is a lot of potential to increase the exporting of vegetables, but growers need help getting into it.

The area of market development, identification of new markets and developing the skills required, is a personal business decision, but is still considered to be an area that requires raising the level of performance by the whole industry.

There is a little concern as to whether this area of industry development should be funded by the R&D levy or by individual growers, and would depend on the benefits and outcomes of projects.

Education and Training

Post harvest handling and storage of produce is still an issue of concern for the industry, particularly as it adversely affects the quality produce that the growers take pride in producing. Education of supply chain members has been suggested as one option to address this. However, this needs to be done on an individual supply chain management case by case to be effective.

One region highlighted the importance of farm safety education and emergency first aid. Support and promotion of these programs by QFVG as a whole would be a worthwhile activity.

Pest and Disease Management

The pest management program at QFVG is the most highly recalled project among the growers. If this program was to cease, there would definitely be a great disappointment among the vegetable industry. One of the reasons this project is so popular is the real difference it makes on farm.

Despite it being a particularly bad season for pest and diseases, not many were listed on the R&D list. The growers realise that most of it is weather related due to the dry season.

There were obvious disappointments in the cut of state R&D funding from QFVG to support some particular R&D projects. However, most growers are aware of the reasons and are accepting of the changes that QFVG needs to make.

Particular issues raised were:

Chemicals

- Registration of active ingredients rather than the brand name for crops because it causes confusion when you spray the active ingredient that is registered under one brand name and not the other.
- Registration for a pest and disease in general rather than by crop.
- Use of chemicals in reused plastic tape to prevent crickets eg. Chlorpyrifos.
- Need a post harvest chemical for fungal diseases on melons.
- Broadleaf weed product that does not hinder crop growth.
- Additional product to control aphids in cucurbits with 1 day with holding period.

Pests and Diseases

- Melon thrips
- More IPM strategies for removing pests and diseases rather than just developing chemicals.
- Silverleaf Whitefly is the biggest problem.
- Mosaic virus for pumpkins.
- Alternatives for chemical control.

Post Harvest

A particular point raised was utilising re-useable plastic containers rather than T35 cartons – this would mean less resources being utilised and more costs efficient.

The increasing costs of production with no higher return on produce is foremost in the minds of growers. Packaging and cartons are expensive and regularly increasing in cost. The problem is further frustrated by the fact that growers are forced to buy brand new cartons that are only disposed of once they reach the supermarket. Quality Assurance is the main reason for this.

Some growers are working with packaging and carton companies to implement systems that use recyclable plastic crates in a closed-system. This system implements strict control over crate return so that none are lost. Recyclable crates offer a far more economical and environmentally friendly packaging system.

This is not really an issue that can be addressed by the R&D levy, however it should still be added to the industry priority list.

Political and QFVG Issues

Many political and organisational issues that were raised cannot be addressed using national vegetable levy funds. However, these issues can often make more of an impact in the day to day running of farm businesses.

Particular issues raised were:

- *Finding good reliable labour and the increasing costs associated with employees is a prominent issues on the minds of growers.*
- The industry needs a state body like QFVG for agripolitical issues.
- QFVG delegates need to have more interaction with the growers in the region that they represent – that is what they are elected for.

- Qld Cane Growers are a good model for QFVG to follow, particularly as far as regional and local association support.
- It was suggested to use local newspapers to inform growers of events and information so that it reaches the local communities too and QFVG can be seen by the community too.
- QFVG need to investigate providing discounted rates of different products to growers, like what is happening with Cane Growers with chemicals and fertilisers (Cane growers buy it in big bulk for less, the growers commit to growing it all and not leave CG with excess).

General Issues

Miscellaneous points raised:

- Advertise the clean and green industry.
- Find out what the consumers want – this would make a difference to what we do and how we pack.

RECOMMENDATIONS

These recommendations have been made for the QFVG Vegetable Program. They should be addressed in future project activities.

- Publicise the national vegetable R&D process.
- Publicise the process and roles and responsibilities that are involved in the national R&D process.
- Ensure Horticulture Australia are aware of the lack of acknowledgment for levy funded projects.
- Investigate the possibility of an information folder that growers can keep and the Industry Development Team can add to. NB: this avenue may be able to piggy back on the 'vegenotes' project being developed by the national vegetable IDO network.
- It would be useful for the Vegetable Program to produce a reference sheet, in both hard and electronic copy, to point people in the right direction, with a number of sources listed.
- *The Vegetable Program needs to develop and implement a communication strategy that delivers useful information; and better utilise established communication channels.*
- *Electronic communication with local and state key industry representatives would be quick and resource friendly. It needs to be noted that this form of communication must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want. This would lead to an expectation that there is nothing worth while contained in these E-mails and there is potential for instant deletion. Also, E-mails must not be doubled up in hard copy.*
- *Providing the opportunity for individual growers to be part of the network if they wish.*
- There is future potential to use E-mail to get R&D information out to all individual growers, but not in the near future.
- Deliver targeted information where possible and ensure that information applicable to multiple commodities is promoted in Fruit and Vegetable News.
- Include all industry stakeholders and supply chain members in the information loop to assist in information dissemination.
- Ensure Horticulture Australia are aware that clearer R&D messages need to be communicated to the industry and acknowledgment of funding by projects is poor and makes increasing awareness of levy investment more difficult.
- Be more pro-active in promoting what information and services are available so that the industry is generally more aware. Make access to easy and hassle free.
- Regularly utilise Fruit and Vegetable News and Good Fruit and Vegetables Magazine.
- Carry out market development activities that address market access, working together, and building long term business relationships and alliances, to assist businesses take hold of opportunities.

- Ensure that growers and business that are identified as requiring assistance, receive it.
- Supply chain management projects should include produce handling and quality management components.
- Gather information on farm safety education and emergency first aid and distribute to the industry via communication networks or Fruit and Vegetable News.
- Ensure the chemicals, pests and diseases needs are added to the industry priority lists.
- Ensure the Pest Management Program receives the chemical, pests and diseases needs information to add to the work program.
- Ensure that the increasing packaging and carton costs with no increase in return to growers is added to the industry priority lists.
- Ensure QFVG receive the political and QFVG related issues.
- Add labour and the increasing costs associated with this to the industry priority lists.
- Add the general issues to the industry priority lists.

VEGETABLE INDUSTRY PRIORITIES FOR NORTHERN AUSTRALIA

There are huge differences between the 3 industry needs and issues lists that have been compiled during this project. Possible reasons for these differences could include:

- The process to gather the needs has become less rigorous. The initial workshops were the first of their kind for the vegetable industry in northern Australia and needed to be robust and thorough.
- Industry is truly more aware of the information and services available, hence these issues are no longer prominent. This is reflected in the notable drop off on the lists for requests for information already available.
- 1999 was a poor year for growers, there were low returns on produce and Quality Assurance systems were causing a lot of frustration and additional capital outlay. These issues subsided and the next year prices were better. Growers openly said that many of the issues and general 'gripes' that were recorded in 1999 are no longer important.
- Growers are developing more business skills and are becoming more pro-active in finding information. Many issues were mentioned in the third round of regional visits, but were not recorded as the growers knew the information was available and could generally name where to get it.
- It can be difficult to thoroughly review the needs lists one on one due to time restraints and the mind frames of many growers when you are talking in the field. However, all growers had time to think about what industry issues and R&D they would like to discuss, and the Industry Development Officer is experienced to review the list on impressions and interpretations.

LIST OF VEGETABLE INDUSTRY PRIORITIES FOR NORTHERN AUSTRALIA 2001

Key points raised and discussed by the industry stakeholders.

This list has been compiled by the Vegetable Industry Development Officer for northern Australia. For detail on particular regions, see appendix 5.

Business and Financial Management and Labour

- Building alliances in the industry and having skilled business that can lead to re-structuring businesses with grower advantage.
- Help growers network together better - alliances.
- Education and training for networking with growers and improved marketing.
- Growers need help to become better business people.
- More research into overseas business and exporting.
- Help growers get into export.
- Business education and training.
- Computer courses for MS Word and Excel and there were some who mentioned the Internet.
- Workshops on the Internet and using it to benefit your business and for marketing for growers and younger generation
- Backpackers are needed for labour – government needs to let more in.
- We need less social security payments for more people will work.
- More access to staff training resources.
- Attracting new/young people into farming.
- We need less government pressures.
- Prove and publicise advantages of grower groups.

Quality and Marketing

- Explore electronic marketing more.
- Grower networking and a more united approach across industry.
- Increase marketing skills of growers; growers need help to market their product better.
- Alliance development to save on input costs.
- Help growers identify and implement value adding, packaging opportunities and export market access
- Marketing, value adding and technology development – need to let the growers know what their options are and what is available.
- New product development – explore value adding, pre packaging and other opportunities.
- Product handling education is needed through the whole chain, especially after it leaves the farm gate. Investigate options for value adding second grade fruit.
- Identification of market opportunities
- Chemical free disinfestation research.
- Developing viable export markets and getting government assistance.
- Increase grower awareness and knowledge of supply chain – take them to the markets!
- Quality management and food safety is needed through the whole chain.

- Cool Chain Management implementation past the transport through to the consumer.
- Educate all members of the supply chain.
- Enlist the help of DPI to help with more information on how to access government funds.
- Focus on taste as well as quality. Educating the supermarkets and growers, breeders on this (taste not quantity).
- People like Shane Comiskey helping to achieve cohesive grower groups
- Recyclable crates – to decrease the rising costs.

Communication

- Better dissemination of information and industry adoption of new technology.
- Growers want to know what new technology is available to assist in decision making for all farm business aspects.
- More information on long term sustainable farming systems.
- Increase awareness and skills and pest and disease identification for growers.
- Accessing information on value adding, producing new crops and pest and disease management.
- Information on where the levy money has been spent - there is a lack of awareness about R&D.
- Establish an effective communication network that reaches every region.
- Growers need to be aware of what services are available to them to improve their business performance and supply chain relationships.

Political

- Finding good reliable labour is one of the biggest problems for farm businesses.
- The margin between what growers receive and what the supermarkets charge is one of the biggest industry concerns.
- The monopoly of the supermarkets. How much they charge and consumers pay compared to what the growers receive.
- Why should the growers be paying superannuation for backpackers when they are going to leave the country?
- Agents should be specialised and deal in particular produce.

Production

Chemicals

- Alternatives for chemical control.
- More control and products available for thrips. There are few chemicals registered for snow peas.
- Insecticides and fungicides – withholding periods need to be less than 7 days for snow peas as we are picking every 4 – 5 days in warm weather and 6 days in Winter.
- Registration of new chemicals for rotation – to achieve lower pesticide residues.
- New registrations for safer pesticides.
- Nimrod (powdery mildew spray) needs to be registered
- Rely more on non-chemical alternatives
- Utilising better pest management strategies to reduce costs on chemicals ie. pest monitoring etc.

Pests and Diseases

- Mosaic virus control and management, including pumpkins.
- Breeding resistant varieties to Downy Mildew
- Mosaic virus
- Tomato Spotted Wilt Virus
- Powdery Mildew in capsicums
- Sudden wilt in melons
- Aphid control
- Leaf Minor control
- Research into problem diseases that are affecting the farmers in a short period of time.
- Research into disease free crops which will mean a viable future for upcoming generations.

Production General

- New types of vegetables to grow.
- Breeding programs for varieties that suit Australian conditions.
- Water reliability.
- Information on incorporating organic and IPM principles into production practices. Not to become accredited, but to utilise the principles.
- Packaging costs – move to recyclable crates and bins to decrease costs.
- Would be better if we didn't spend any money to make it easier to grow!
- Instead of money spent on eg. New celery varieties, why not spend it on helping out things like celery burn on the people that pick it? Stuff that's really useful on the farm?
- Snow pea varieties are needed.
- Soil health projects are important.
- Develop mechanics in consultation with engineers.
- Industry adoption of production needs.
- Money for breeding of better cultivars.
- Trace element requirements for parsley and radish.

Consumers

- Advertise the clean and green industry.
- Find out what the consumers want – this would make a difference to what we do and how we pack.
- Counteract the greenie statements about chemical use.

LIST OF VEGETABLE INDUSTRY NEEDS, 1999

Arising from regional workshops and farm visits

This report identifies areas where the vegetable industry in northern Australia needs to improve in order to become more profitable, sustainable and market driven. Figures given in brackets indicate how many votes were allocated to a need, but not all needs listed were identified prior to voting. However, the figures do give some indication of the perceived relative importance of each issue.

Many of the needs identified are repeated to illustrate their relevance to the different districts. In some cases, the repetition is due to the influence of the issue on more than one sub-category. For example, many of the issues related to consumer demands also have an impact on marketing strategies or production research needs. Some needs are applicable to more than one category, but only appear in one. The grouping of needs into like categories is intended only as a guide and have been collated in this fashion for ease of reading and reference.

The needs listed in red are those that did not result from the needs identification workshop process, for example a need identified from a grower visit or the initial brainstorm.

The different bullet points represent needs identified from each region.

- | | | | |
|---|--------------------------|---|----------------|
| □ | Northern New South Wales | • | Granite Belt |
| ◆ | Darling Downs | ♣ | Bundaberg |
| ■ | Brisbane Metropolitan | ❖ | Lockyer Valley |
| ➤ | Fassifern Valley | ⇒ | Gympie |
| # | Sunshine Coast | ☒ | Gumlu |
| ✕ | Ayr | ☒ | Bowen |
| * | Rockhampton | | |

1.0 Needs related to understanding and meeting Consumer Demands

What do consumers really want?

- ❖ Industry needs to understand consumer power.
- ❖ Determine what consumer wants – the real consumer (3)
- Find out and communicate to growers what the consumer really wants/ Does the consumer really know what they want? (5)
- Research needed into the consumer – what do they really want, what influences their buying, what is their perception of quality
- ◆ Growers want feedback from the consumers
- ⇒ Need independent research into consumer demands and forward results to growers and groups. (12)
- ❖ Paid professional to get information – basic market research to be conducted
- Spend money on consumer research.
- ❖ Find out what the future demand will be for ie. will we still be able to sell brushed potatoes in 10 years or only washed? (1)
- ❖ Find out if GMO's can be sold/marketed & if so the best way (1)
- ❖ Packages to suit consumer lifestyle, rather than agents.

- ❖ Consumer research available or done by growers – so that producers have better & quicker idea on how the trends are moving & how to respond eg. are trends driven at the consumer or retailer level?
- Two way flow of information required. (2)
 - Use the levies to carry out a consumer survey to find out what they really want (1)
- ⇒ Find out what consumers really want.
- ☒ Life style will dictate what they are going to eat, therefore we need to know so we can grow varieties/commodities to suit. (2)
- ☒ QFVG should have the infra-structure to carry out the consumer demands need identified.
- ✕ Information on consumer demands their changes.
- ✕ Should do own research on consumer demands before growing. (1)
- ✕ Encourage people to fill in consumer questionnaires on quality of produce. (2)
- ✕ A national survey could be done of consumer demands etc.. on a regular basis; data collated and be made available to growers. This would help us have the upper hand. (5)
- * How much work has been done on consumer survey's? Make the results from surveys available to growers

Provide consumers with what they want

- Develop and grow vegetable varieties which are tasty, safe, perform well, high yields, consistent. (4)
- ❖ What portion sizes should be provided (eg. cabbage, pumpkins) – trend is for smaller portions – what do the real consumers want?
- Consumers need ease & speed when shopping & cooking vegetables.
- ❖ Explore value adding & co-operative processing opportunities
- More semi-processed/pre-packed/new product.
- Different ways of pre-packing vegetables.
- ❖ Partial preparation on farms eg. pulling the stalks out of lettuce (3)
- ♣ Greater investment in value adding: packaging, semi processed products, utilise health as a selling point, consumer awareness of systems of accreditation. (9)
- ☐ Improved consumer demand
 - Improve production practices to meet the demands of the retailer.
 - Need closer and more cooperative links between growers and retailers.
 - Increased communication between producers and growers.
- # Convenience – improve appearance
- * Look at different ways to present the product
- * Pre-cut veges – convenience (1)
- * Set 'standard veges' – a list which all growers should produce so that consumers are aware of what's regularly available (organic growers)

Vegetables promotions

- More money needs to be spent on influencing the consumer & raising the profile of fresh vegetables. (1)
- ☐ Promotion of crops. (4)
 - More awareness of nutritional values of fresh fruit and veges eg. the tick from the heart foundation. (9)
- ❖ Promotion of nutritional benefits
- Promote better lifestyle. (13)
- What is the intrinsic value of vegetables so that the industry can understand what the consumer really wants and then give it to them? (1)
- Better labelling of import products.
- ❖ Spend large amounts of money on TV advertising (1)
- ❖ Conduct more in-store promotions – get them to taste the fresh, quality veges (1)
- ⇒ Advertise the clean and green image and also have quality systems in place. (1)

- ⇒ In store, on-shelf information about product nutritional information, storage and preparation. (3)
- ⇒ Better value for advertising dollar. Maybe subsidise private enterprises for in store promotions, cooking demos, recipe hand outs and taste testing. (1)
- ⇒ Promotion programs for hand picked products as opposed to hand picked types (1)
- ⇒ Need better advertising and sales promotion
- # Promotions to work better
- # Encourage repeat purchases
- # Quality and Freshness – advertise & teach people how to cook on talk show's like Healthy Wealthy & Wise, and not just because there is a new variety (5)
- # TV show's to educate people that growers are using IPM methods, produce environmentally safe produce and reduced chemical usage (1)
- # Promote fresh produce as healthy.
- ☑ Increase R&D section of levy and decrease (or delete) promotions levy.
- ☑ There should be no promotions levy.
- ✗ Promotions levy should be downgraded.
- ✗ Promotion is important
- ✗ Drop the promotions levy - we will do it ourselves and deal directly with companies like Woolies.
- ✗ There is a promotions levy on export but no promotions overseas for us!
- * Look at promotions which coincide with seasonal veges so that consumers know what's available

Consumer Education

- ⇒ In school information programs eg. milk programs. (7)
- ⇒ Consumer awareness programs about food safety issues, nutrition, food preparations. (2)
- ◆ Consumer education about how much growers contribute to the Australian economy
- Education on how to use fresh vegetables.
- ❖ Educate consumers on what to do with their vegies – including TV ie. how to boil a potato
- ❖ Educate the consumer so that they want to buy a 1kg cabbage rather than a 2kg cabbage (2)
- ❖ Consumers need to be educated to accept blemished product (but otherwise high quality) (9)
- ⇒ Educate consumers about GMO food.
- ❖ Better communication across chain from grower to consumer – so everyone knows what happens and what is required
 - Need to educate consumers to accept or tolerate GM produce
- ⇒ Education throughout the whole chain
- # Better ways to cook corn and broccoli
- * Educate public on understanding of unblemished fruit
- * More education needed as consumers don't know what they want
- * Educate consumers on how to use foods – recipes (1)

2.0 Needs related to improving Quality & Marketing

The QA System

- ◆ QA needs to add value to the farm and/or produce for it to be worthwhile for growers to adopt.
- Has to be farm related to be relevant.
- Growers need a better awareness of Quality Assurance schemes. (2)
- QA shed and chemical accreditation. (7)
- Uniform QA systems that follow through beyond the farm gate.

- ⇒ QA and food safety needs to be carried right through the whole chain. (8)
- ⇒ Product Identification and traceability systems need to be in place. (3).
- Need a dialogue between grower, Big 4 and agents on necessary QA
- ⇒ Growers need to have more input into setting QA standards.
- ⇒ QA and food safety to occur through the whole chain (1)
- # Fund a full time QA position for QA, marketing issues? Need to have someone to sort out practical issues out.
- # Need a uniform system across industries
- # Industry standard for quality should be set by industry rather than supply & demand
- # Research in prices, supply & demand – information system (2)
- ☒ Set the standard, not so much accept the standard. (1)
- ☒ Grower networking. A more united approach across industry. (1)
- * Make testing methods for quality accessible to growers – so they get benefit if they have higher quality! (3)

Quality Assurance Training

- There is a lack of personnel to provide training – need more people. (1)
- ⇒ Should be more education programs on how to handle the product right through the system. (5)
- # Need to have a simplified QA system developed – can someone provide more information about how to fill it out? (2)
- # QA & HACCP – education for pickers, packers, public (refrigeration), chain stores (improve handling)
- ☒ Could spend money on training manuals.
- ☒ QA training.
- ☒ Hygiene systems could be improved – in the field, packaging and processing.
- * Continue QA & HACCP education and training (1)

The Marketing systems

- ♣ Domestic marketing systems needs to be more grower oriented eg. Dutch Auction System. (1)
- ♣ More accountability of agents. (1)
- ♣ More accessible information – not extra research making what is already available eg. through puts and imports of particular commodities. (1)
- Natural market forces – due to financial pain, viability, levies – facilitating role by QFVG & change by individual growers.
- # More specialised agents needed within the markets (2)
- # Retail storage temperatures to improve (1)
- ☒ Not so much on marketing.
- ☒ Someone needed to make sure and enforce honesty in market agents. (3)

Central Markets payment system

- At markets – retailers pay a central bank for crops ie. then agents & growers are both paid (fairly) from this. (18)
- ☒ More control wanted over the pricing system, growers want more input. Everybody else in the demand chain has set prices except for the growers. When you are told you will get a price you should get it. (8)

Cool Chain Management

- Training in cool chain management for everyone in the cool chain. (4)
- Streamlined cool-chain management partnerships between breeding and production. (5)
- ♦ Temperature control is needed all the way down the chain.
- Cool chain guidelines that go from the grower through to the chain stores.
- ⇒ Cool chain system needs to continue through the marketing system as well (5)

- ☒ Cool chain management and general handling needs to be improved – esp after it leaves the farm gate. (1)

Coordinated marketing/Alliances

- Marketing – fix the disorganisation (2)
- Farmers to grow the produce and someone else to market and sell it.
- ❖ Need for accurate information about quantity & quality on the market
- Grower unity as a potential to bargain with major buyers.
- More grower meetings (2)
- Grower – Buyer interaction to become more stable – contracts, quality specified and set.
- ❖ Need more cooperation between growers, packers and supermarkets – supermarkets need to visit farms and farmers need to follow chain through marketing system to retail shops.
- ❖ Get people with marketing degrees into QFVG to help.
- ◆ Information and help available to growers about carrying out successful marketing.
- Growers need assistance to work together
- Chains are educated in the sense that they understand the whole production chain and its influences, not just what happens at their point.
- Promote and build a packing house. (2)
 - Farmer cooperative marketing groups that market directly to retailers and increase exports (quality and critical mass). (2)
- ⇒ Prove and publicise advantages of grower groups. (2)
- ♣ Survey of growers who want to network – for market research possibly by commodity or group of vegetables and inviting them to come together.
- Packing house – promote and build (2)
 - Direct marketing groups – standardised, QA standard.
- ☒ Look after smaller commodities/growers.
- ☒ Managing people – getting people to look at themselves.
- ☒ Need to rejuvenate regional and community membership to refragment the industry.
- * Facilitators/drivers for group actions for marketing/contracts growing
- * Each grower maintains control of own decisions/farms, but can be member of 'group decisions'

Packaging

- Packaging/better handling systems designed for the consumer needs. (1)
- Need better agreement with supermarkets on who owns the packaging (especially that packaging which is sold second hand with no return to growers)
- ◆ The cost of packaging wrt cartons is very expensive
- ⇒ Product labelling and portions control research – what pack sizes etc. (2)
- ♣ Research required into extended shelf life eg. cool chain, ozone, CA, cryvac varieties. (5) especially for export
- ♣ Packaging & presentation & storage
- ⇒ Pre-pack systems to meet consumer demands (1)
- ☒ Styro packaging is needed for beans and corn.
- * Research more cost effective packaging (1)
- * New packaging – cost friendly (1)

Develop new markets

- Value adding
- Value adding (packaging & presentation) (4)
- ❖ Increase proportion of money spent on developing markets & promotion & less on production issues, such as weeds, insects & diseases (3)
 - Paths to by-pass chain stores developed (a form of direct marketing). (1)
- ⇒ Electronic marketing systems developed. (1)
- ◆ Research into GMO's and how they will affect marketing opportunities for Australia.

- ♣ Project to determine industry opportunities associated with GMO's
- ♣ Accreditation for using IPM – a marketing tool
- ⇒ Marketing research for snowpeas
- ☒ Investigating overseas trends eg labour and government policies, that can help us.
- ☒ Farmers will need to go more into value adding of products.
- ☒ Develop markets for new varieties before they are produced. (2)
- ✕ Facilitate lines past wholesalers and along chains. (3)
- ✕ Identification of market opportunities.
- ☒ Stimulating market demand for products.
- ☒ Market access.

Export Markets

- Growers need assistance to enter export markets
- ❖ Promote export markets
- ⇒ Research on how to get into export marketing – Government funding may help with this. (7)
- ♣ Seeking out export markets (1)
- ⇒ Research new and off-shore markets.
- ☒ Greater research into overseas business and exporting. (6)
- ☒ Developing viable export markets. (7)

Strategies to maintain high quality

- Process all second grade fruit & take it off the market (not 'fresh cuts').
- ❖ Packages to suit consumer lifestyle a raw commodity? – Continue to implement QA training for producers (5)
- ❖ Supermarkets need to apply high quality standards to their own stores
- Quality assurance from production/transport/store required to make it worthwhile for grower to be involved in QA.(6)
- Specification needs to include nutrition/flavour as well as size, shape, colour etc. (4)
- Research into these characteristics to determine quality.
- Need illustrated grade standards for carrots
- ☐ Need the produce description defined.
- Must use QA approved distributors. (4)
- ⇒ Vegetables need to get to the consumer faster. (1)
- ✕ Whole chain from grower to consumer educated on how to maintain quality ie. once it leaves the farm gate. (2)

Retail strategies

- ❖ Vegetables need to be where the consumers will encounter it – shelf locations in retail shops (3)
- ❖ Answer the question: how can we market a differentiated produce rather than vegetables more difficult than fruit.
- ☒ Can money be spent 'hobbling' the chains?

Clean & green image

- ❖ Adoption of code of practice for vege industry (environmental issues) (12)
- ❖ Reduced chemical systems to enable a differentiated marketing presentation
- Have specific definitions on quality and food safety so they can be applied.
- ◆ Research needed into the recycling of plastic mulch
- ◆ Approve second hand cartons, this will reduce waste and cost of packaging at the same time.
- ♣ Growers need credit for producing veg in environmentally friendly/sustainable way, that matches consumer demand.
- ♣ Maintain and improve our clean & green image.
- ☒ Great Barrier Reef – run-offs research.
- ☒ Maintaining/Intensifying Clean & Green image.

- * Research non chemical alternatives – go organic! (1)
- * More research into biological control and beneficial bugs to results in clean, chemical free produce (4)

3.0 Needs related to improving Business, Financial & Labour Management

Form grower alliances

- Growers working together, not against one another. Form crop groups eg. brassica. (12)
- ❖ How to develop alliances? Co-operatives? Search out people with common interests & see if an agreement can be reached (11)
- ❖ Aim to sell by brand name (11)
- ❖ Follow the lead set by the potato growers – establish market & co-operative join together to sell an agreed volume of product each week
- Business groups – neighbours and friends/people that get on.
- Share resources, knowledge etc.
- Need a Facilitator for these things – an outsider.
- Too much for one farmer to manage business, quality, farm marketing. Need to leave the farmer to grow and produce product, someone else to market & sell.
- Pressure from marketing influences to improve trust (professional) in industry to consolidate growers groups in marketing, contracting and attracting finance. (16)
- ☒ A professional officer is needed to train marketing group members in overcoming personality clashes and agree on one thing.
- ✕ Forming a co-operative.
- ✕ People like Shane Comiskey helping to achieve cohesive grower groups.

Government assistance

- Government support eg. putting away money & simplifying tax system. (11)
- Government support for industry.
- Government support – sinking fund.
- ❖ Influence government policy to increase support to rural communities & regional development(2)
- ❖ Redesign the work-for-the-dole program to include vegetable production
- ❖ Obtain concessional access to communication technology
- ❖ QFVG needs to show more leadership on difficult environmental and legislative/trade barrier issues which will have longer term effects on farm.
- ☐ Government to provide information, assistance, knowledge of what programs are available, to help keep competitive world wide.
- ⇒ Government funding may help in research on how to get into export marketing (7)
- ☐ Control Big 4 profit margins
- # Subsidise farmers.
- ✕ Government help (subsidies) for growers to deal with paper work. (1)
- ✕ Enlist the help of DPI to help with more information on how to access government funds. (1)

Farm Labour

- Relaxation of work visa laws ie. easier to obtain. (7)
- ❖ Develop communication between growers and immigration officers – more unskilled labour needed & relaxation of immigration laws
- Lift image of back-packers.
- ⇒ Relaxation in laws to labour provisions for backpackers.
- ☒ Increase visas for backpackers so we have more labour.

- ✕ Backpackers are needed for labour – government needs to let more in.
- ✕ Lobby for working VISA's. (3)
- ✕ Labour is a huge issue and back-packers are essential up here.
 - Government programs to improve availability of labour.
 - Sourcing seasonal labour
 - Formation of quality employment provider.
- ❖ Need some type of organisation of work force – development of relationship, training of contractors, supervisors & pickers within the district (college do this?)
- ❖ Contract labour (11)
- ❖ Develop a plan to maintain labour availability
 - ♦ Need good quality and reliable labour
 - ♦ Lift the image – some kind of incentive – labour on farms is seen as unskilled
- Develop a workforce with the relevant skills. (2)
- ♣ Need training and incentives to recruit labour and seasonal continuity to promote some sort of career. (5)
 - Investigate alternative labour systems – ie. Cooperatives/sharing work forces (Feed and fibre trial)
- ⇒ Need less social security payments (1)
- # Push for reduction in social security given out when there is an area in season
- ✕ Unbiased identification of what pickers can earn in F&V industry.
- ✕ Contracted pickers require training. (1)
- ✕ Labour picking scheme that will provide adequate hours per week and weeks per year - may need to move from farm to farm.

Business management & training

- ❖ Must learn to work out our true costs of production (2)
 - Family farms need to be more business oriented eg. better time management and delegate jobs.
 - ♦ How can we increase farm succession? (needs to be answered)
- ♣ Develop a system to match supply and demand – easily accessible records/database to provide such information.
- Need access to training. Information about courses/programs?
- More computer literate.
- Project management to improve production.
- Access to data to improve production.
- Up-skilling at the management and business level to improve production. (3)
- Need help with farm succession – how can we encourage young people to stay in farming?
 - Extend the future profit scheme to benefit growers in all areas. (2)
 - ♦ Information about through put and prices for all market commodities for a period of 5 years, based on the central market reporting system, should be made available to growers for research, at no cost, as we pay the levies!
- ♣ Things need to be done differently for different sections of the industry – for both larger and smaller enterprises – these may differ but both are important. (2)
- ♣ Simplify cash flow and projection training, more business planning and development. (3)
- ☐ Continue with training for Workplace Health & Safety.
- ☐ Organised advisory seminars.
- ☐ Purchase price too high for farming – need to have more land elsewhere for the same money.
 - Contract harvesting is needed
- ⇒ Need less government pressures
- ⇒ Regular discussion groups including both on and off farm related business stuff for cross fertilisation of ideas and planned self help processes.

- ⇒ Recognise distinction between large, medium and small businesses – they all have different needs (also commodity vs specialised producers)
- ⇒ QFVG should operate according to size of enterprise rather than commodities (ie. Matrix management system with links between various groups) (4)
- # Information dissemination and extension is lacking for farmers to get information
- # Governing of planting's – increase profit margins
- # Staff training workshops provided by QFVG to train key personnel eg. machinery classes (1)
- ✕ Better time management for farmers - balance farm practices and financial management
- ✕ Skilled business planners relevant to our industry that could lead to restructuring with grower advantage. (2)
- ✕ Business education and training – networking, QA, products, marketing. (3)
- * More farmer-friendly training in business planning and financial management (5)
- * Promote TAFE and other training activities for skilled labour pool
- * Need for tutoring in business and financial planning
- * Courses on Internet marketing, and information, buying inputs etc... (1)
- * Training & education – accounting, business management for farmers
- * Forget about all the production issues and get more into marketing and business
- * Communication both intra and interstate is very important

Financial Assistance

- Finance for farm equipment must become more flexible. (11)
- Make financial advice/guidance readily available eg. how to best benefit their business whether it be consolidation, learning how to use computer software to predict outcomes for certain scenarios etc.?
- ♣ Education and information about financial and business matters available to both large and small businesses. Financial management – income vs expenses.
- ♣ Financial institutions that will assist smaller businesses. Financiers needs to be educated of the needs and variability associated with farmers.
- ⇒ Seek expert advice on cash flow, tax, business decisions, setting up financial management systems
- ✕ Every aspect of farm business analysed to find cost cuts. (1)

Computer Training

- Training on Internet usage (General computer training).(1)
- Farm oriented software to help farmers with computer usage – need programs specifically suited for intensive vegetable production.
- Have a financial package ready for the growers to put in the numbers eg. a ready made excel spreadsheet. (4)
- ⇒ Growers of small crops need computer packages especially designed for them eg. MYOB small crops.
- Computer accounting
- ⇒ Standardise computer programs
- ⇒ Growers need to learn how to use computers
- ☑ Workshops on Internet marketing for growers and younger generation.
- ✕ Computer aided vegetable marketing (CAVM) to reduce the need for transport.

5.0 Needs related to improved Production

Financial assistance

- Venture capital. (3)
- Financially assist younger generation to stay on the farm or go farming. (6)
- Minor use crops don't see any research from the levies.

Professional services required

- More reliance on professional advice for field control. (5)
- More accountability in the service sector eg. Seed companies technical advice. (7)
- Agronomic advice sector to be more reliant on results of advice for viability rather than sale of merchandise. (9)
- ❖ Need to give researchers incentive to stay longer in job – at least 3 year contracts with performance criteria.
 - Industry defined officer needed to better disseminate results and information. (3)
- ⇒ Greater use of consultants. (1)
- ♣ Need to understand the soil better – team approach with a group of specialists. (8)

More consistent production

- Producing more consistent product. (6)
- More research on how to level out production highs & lows eg. controlled planting. How can you control these highs & lows? (2)
- ❖ More specialisation – 5 different crops/yr/property everyone keep to same crops yr after yr
 - Want information about proven agronomic and economic, sustainable farming methods.
- ⇒ Provision of technology to aid in production and to help decision making. (6)
- # Research into the effect of climate on yield & quality

Overproduction

- ❖ Needs more over production for a few years – continue lack of profit – continue pain – then people will change
- ❖ Different areas agree to grow only during optimum time slots – this will decrease use of chemicals and improve profits (8)
- ◆ Strategies to tackle over-production. Educate growers about market research and market quality standards.
- ☒ Govern planting regions to tackle oversupply and returns to growers will be more. (1). Need self regulation as well due to individual greed.
- ⌘ Orderly production. (1)
 - Control planting.
- ⌘ Need Mother Natures regulation in combating overproduction.

Water

- More water – 2 large dams on the Granite Belt. (10)
- ❖ Water usage – continue to look at efficiencies technology/physiology (3)
- ❖ Water use efficiency and it's future.
- Water costs
- ☒ Quality water is definately needed to maintain quality production.
- * Irrigation technology – looking into enviroscans
- * Hyminachne in waterways

Production research (general)

- ❖ Continue to decrease inputs while increasing outputs – profitably (3)
- ❖ Total management strategies – integrating soil management with growing systems through to harvest.
- ❖ Encourage more applied research projects – allow Masters or PhDs to be taken outside traditional University system.
- Systems to protect young carrots from wind especially in sandy soils
- ◆ Glasshouse vegetables need specific promotion and research into varieties, glasshouse design, trellising, Bumble Bees, SLW
- ◆ Reports on research should be made available free of charge to growers of a particular commodity to which the report relates, as we are the ones who pay the levies

- ☒ Why do we have to pay for the research reports that our levies fund? (needs to be answered or changed)
 - ◆ Information – crop nutrition, irrigation, water quality control – recommendations for practical use
 - SLW information on management in crops.
 - Management information about water usage, rotations, production systems, nutrition. (1)
 - Sweet potato vines from overseas to replace current varieties. (1)
 - Erosion control methods. (4)
 - More crop protection information. (1)
 - ⇒ DPI research and breeding programs to be reinstated. (5)
 - ♣ Production geared to market trends. (3)
 - Projects conducted to produce guidelines for growers interested in producing a greater proportion of crops under cover.
 - Further development of niche products.
 - ⇒ Research into which Asian Vegetables could be grown in the Gympie region and identify the markets.
 - # Levy should be spent back on the crop it came from
 - # Mechanical harvesting projects funded
 - # Need access to overseas information on equipment (past projects)
 - # Better information delivery needed. We need to know where the levy goes and what it's paid for in the past eg. newsletters. More extension and need access to past research results
 - # Need local research trials (Nth Qld results are not too relevant) (2)
 - ☒ Investigate what the future is going to be like in agriculture esp horticulture and veges eg in 50 years time.
 - ✕ More information on long term sustainable farming systems. (2)
 - ✕ Sustainability eg plastic mulch.
 - ✕ Spend the levy back into the crop where it came from.
 - ✕ Develop mechanics in consultation with engineers.
 - ✕ Funding for implementation of production needs. (2)
 - ✕ Industry adoption of production needs. Dissemination of information, new technology. (5)
 - ✕ More research dollars for soil health projects. (4)
 - ✕ Coordinated distract spraying.
 - * In organic farming, salt and acidification problems must be resolved
 - * Soil tests – measuring microbial activity, structure, how to improve (7)
 - * Economic feasibility of cover crops and green manures (1)

Pests and diseases

- White Fringe Weevil and Wire Worm damage on sweet potato – management (3)
- Management and control information for nematodes, scurf, weevil, wilts etc..(8)
 - Heliothis management
 - ❖ Area wide heliothis management
 - ◆ Pest resistance to chemicals
 - Research on carrot fungal diseases eg. rhizotoma
 - ◆ Celery Mosaic Virus
 - ◆ Corky Root Rot
 - ◆ Head Rot
 - ◆ Sclerotinia
- 'Scurf' in sweet potatoes can cause up to 30% loss – more research needed on this fungus.
- Nematode research
- Zucchini diseases in Cudgen & Duranbah
- Improved and cheaper monitoring systems for pest/disease/nutrition and irrigation.

- # Trichogramma research in sweet corn/broccoli etc and all other relevant crop situations (3)
- ☒ Disease in paddock research needed – Tomato Spotted Wilt Virus and Powdery Mildew in capsicums.
- ☒ Research into disease free crops which will mean a viable future for upcoming generations. (3)
- ☒ Research into problem diseases that are affecting farmers in a short period of time. (4)
- ✕ Utilising better pest management strategies to reduce costs on chemicals ie. pest monitoring etc.. (2)
- ☒ Pest and disease control in crop rotations.
- * Rotation schemes that work best – bio-fumigants, nematode control
- * Biological controls
- * Shelter belt efficacy in pest control – predator shelter

Chemicals

- ☐ Research into replacing chemicals. (2) To combat resistance and restrictions
- ☐ Easy access to NRA permit to register chemicals not registered for a particular crop. (8)
 - Registration for parsley – insects, weeds and fungicides.
 - Generic registrations – one for each family of plants.
 - Streamlined minor use systems eg. for Asian Vegetables and more sympathetic handling of minor use applications for smaller crops. (1)
- ⇒ Snowpeas - new chemical/s registered for powdery mildew, and replacement chemical for Bravo.
- ⇒ Industry needs to counteract greenie statements about farm chemicals etc. (1)
- Chemical registration – minor use permits for carrots
- ◆ Chemicals to control pests and diseases in lettuce, silverbeet, celery and capsicum's wrt nematodes and grubs
- ◆ Alternative to endosulfan due to restrictions on its use
- Fumigants to replace methane eg. biofumigants
- ◆ Alternative soil fumigant to Methyl Bromide
- ♣ Needs chemicals for below ground pest management to replace Methyl Bromide
- ◆ Research into fruit fly baits wrt waterproofing them so don't need to reapply after it showers
- ♣ Research into what chemicals effectively fit into our pest vs IPM management strategy and money spent on registering these products. (7)
- ♣ Replacement for soil fumigants. (1)
- ♣ Needs chemicals to fit into IPM systems.
- ♣ Chemical registration for small line crops eg. chilli
- Minor use registration
- ☐ Ways to reduce the use of chemicals – cheaper and consumer satisfaction.
 - Clarity in some chemical registrations regarding what crops you can use them on
 - Need a minor use service provider
 - Temporary minor use registrations extended from 1 to 3 years.
- # Replacing chemicals lost
- ☒ Need registration of efficient chemicals so we don't have to spray all the time. There is too much use of one chemical!
- ☒ Chemical companies should do their own trials on chemicals.
- ✕ Nimrod needs to be registered.
- ☒ Chemicals with short with-holding periods.
- ☒ Residue trial data work.
- ☒ Need a substitute for Dimethoate. If it is taken away it will restrict too much trade. The myths about Dimethoate need to be proven or disproven.
- ☒ New registrations for safer pesticides. (5)
- ☒ Chemical free disinfestation research (2)

- ⌘ Rely more on non-chemical alternatives.
- ⌘ Registration of new chemicals for rotation – to achieve lower pesticide residues. (6)
- * Biological controls
- * Diathane for capsicums
- * Pithium chemical registration

Post-harvest

- ◆ Effective and efficient technology needed for post harvest handling
- ❖ Look at wrap to mechanise particularly post harvest and to replace labour (5)
- ⌘ Micro-flora of fresh fruit and vegetables.

Plant varieties/breeding

- Genetically modified organisms
- ❖ Improved plant genetics – less fertiliser & water use, P&D resistant and can be mechanically harvested (3)
- ❖ Breed plants to match consumer needs.
- Variety selection & improvement
- ◆ Varieties bred to be region specific
- ◆ Varieties to suit sea-freight/export
- ◆ Broccoli strain to be competitive with Californian varieties.
- Bacterial Wilt resistant tomatoes.
- Need a Winter variety of zucchini.
- Better plant breeding – breed for flavour, disease and pest resistance. (1)
- ⇒ Better breeding programs to suit Australian conditions (7)
- ♣ Research into biodegradable plastics eg. GMO modified sugar can to produce plastic producing bacteria. (3)
- Investigate new Summer and Winter crops/varieties for Northern NSW area.
- # New varieties needed.
- ⌘ Breeding resistant varieties to Downy Mildew.
- ⌘ Mosaic Virus a sometimes a problem.
- ⌘ Focus on taste as well as quality. Educating growers and breeders on this (taste not quantity) (1)
- ⌘ Identify alternative crops in order to decrease over production in other areas. (2)
- ⌘ Investigating alternative crops.
- ⌘ Varieties of zucchini are needed – but the seed companies are doing this.
- ⌘ Money for breeding of better cultivars.
- * Resistant variety development (2)
- * New crops for the area (1)

Biological control research/IPM/organic

- Organics
- ❖ Organics – some major gains to be made with IPM. Replacement of chemicals with bio-pesticide regimes repellants, genetically engineered plants
- ❖ More implementation of IPM/Biological control programs – need research to help show up how to do it. (*most regions*)
- R&D - carrot diseases, chemical and biological control, influences on production.
- Need better IPM strategies to meet foreign import requirements. (2)
- ♣ IPM approach aimed towards more environmentally friendly methods. (1)
- ♣ Need an identifiable brand recognition of IPM by consumers. (3)
- Alternative crops
- More biological control research (5)
- More IPM projects needed
- ⇒ New types of vegetables to grow
- ⇒ Biotechnology/GMO's to help with shelf life and 'organic' products.

- ✕ Biotechnology in crops information needs to be available – a lot is done but it is by private companies.
- * More research into biological control and beneficial bugs to result in clean, chemical free produce (4)
- * Research into the future eg molecular techniques that may feed into pests and diseases
- * GMO's – what does it really mean to growers?
- * Fruit Fly – biological control methods
- * Resistant varieties for pests and diseases
- * BT's in tomatoes for heliothis

5.0 Needs related to improving Transport systems

Transport systems

- Industry will force changes to transport as needed eg. rail transport, shipping containers. (1)
- Piggy-back systems may develop (as in the U.S) where a truck is used to load trailer onto train. A railhead needed at Rocklea – near Rocklea.
- ❖ Transport companies need to keep up with technology
- ❖ Rapid transport for export (cheap air freight) or a long life packaging/transport system for sea freight
- ❖ Co-ordinate harvesting and transport from farm to market (10)
- Access to volume loading of containers. (5)
- Research into transport options for export.
- ◆ Reliability and performance of sea-freight containers out of Australia needs to be improved
- Need prompt service from the transport companies. (1)
 - Need bigger trucks and better roads.
 - Air conditioned trains – in the future.
- ⇒ AT THE MARKET – need more central parking so we can have whole loads of one line (or compatible lines)
- # Move to reliability to getting to market on time
- # Levies should not be spent any more on transport
- ✕ Lobby for inland rail project (VFT)
- ✕ Sea-freight trials. Coordination at ports ie. infrastructure
- ✕ Computer aided vegetable marketing (CAVM) to reduce the need for transport.
- ✕ 'Someone' to develop the transport technology and facilitate its implementation. (1)
- * Grower owned transport chain – no levy to be spent on this
- * Lobby for high speed train (feasibility study – part of funded by levy)
- * Information on space on empty planes going to Asia and the rest of the world (would be nice but sounds impossible!)

Packaging

- Reduced packaging costs.
- ❖ Systems of packaging and transport that preserve quality
- ⇒ Need to look at potential of recyclable crates

Cool chain management

- Cold chain maintained.
- ❖ Cool chain from paddock to plate (1)
- Research into streamlining cold chain for transport – costs, benefits, limitations.
- ⇒ Cool chain management information is not consistent – need to know ideal temperatures.
- ⇒ Cool chain requires: research, infrastructure, and education all the way from farm gate to market and continue through the marketing system (11)

- ♣ Cool chain management for export
- * Mini containers with separate temperature/MAP control (levy to fund information on storage, environment requirements – especially for new products) (2)

Quality management

- ⇒ People required with practical understanding of how to handle vegetables.
- ❖ Better understanding of where quality deteriorates through transport chain and then improve where system is falling down
- ❖ Fast & reliable transport and reduced handling the key for preserving quality (2)
- ❖ Education of workers in chain stores
- HACCP program for less loss and damage. (1)
- ♣ Research into non invasive temperature assessing equipment that can detect the temperature throughout the pallet without having to de-stack or use invasive probing. (something that can be used outside that pallet to detect temperature changes inside the pallet, current devices rely on being put inside the pallet on stacking and later retrieving them).
- ♣ Research on better palletising systems to meet requirements of supermarkets re: pallet stack height and the need to make sure product is not damaged by top stacking.
- Quality management up to and through the markets.
- ⇒ Must have a quality system in place eg. HACCP.
- # Maintain cool chain to keep quality up at all stages.
- ☒ Policing of transporters temperature in loads or storage, include QA and HACCP. Also vans to be cleaned before loaded. (4)
- ⌘ Education throughout the whole chain on post harvest handling – storage, temperature, humidity, other F&V commodities etc..
- ⌘ Reporting system – temperature, digital cameras etc..
- ⌘ Let transport firms know what's in it for them.
- ⌘ More influence over government officials to make them implement transport improvements.
- ❖ Better suspension/transport technology (1)
- ☒ Education for transporters on issues associated with mixing of fruits and veges in loads or storage.

VEGETABLE INDUSTRY NEEDS – NORTHERN AUSTRALIA, 2000

Arising from regional workshops and farm visits

This report identifies areas where the vegetable industry in northern Australia needs to improve in order to become more profitable, sustainable and market driven. This list was generated by addressing the 'List of Vegetable Industry Needs 1999' with existing information sources and services and assessing their relevance. As well as new needs and issues, the list still contains needs from 1999 which could not be sufficiently addressed with current information and services.

The needs are regionally coded with bullet points under each heading. Comments and interpretations from the workshop notes and work sheets are included at the end of this report for reference.

The different bullet points represent needs identified from each region.

- | | | | |
|---|--------------------------|---|--------------------|
| □ | Northern New South Wales | • | Granite Belt |
| ♦ | Darling Downs | ♣ | Bundaberg |
| ▪ | Brisbane Metropolitan | ❖ | Lockyer Valley |
| ➤ | Fassifern Valley | ⇒ | Gympie |
| # | Sunshine Coast | ☒ | Gumlu |
| ✕ | Ayr | ℳ | Bowen |
| * | Rockhampton | ~ | Northern Territory |

PRODUCTION

- Systems to protect carrots from the wind, especially in sandy soils. (WA research?)
- The industry needs organising on a regional basis – to tackle over production. Look into contracting, minimum price structure.
- ❖ Promote the benefits of adopting Farmcare.
- Water reliability.
- Information on incorporating organic and IPM principles into production practices. Not to become accredited, but to utilise the principles.
- ♦ Bumble Bees in glasshouses.
- ♦ Capsicum and Silverbeet nematode registered chemicals.
- ♦ Celery Mosaic Virus.
- ♦ Herbicide registered for broad leaf weeds in lettuce.
- ♦ Chemicals – good products not available to use in rotation for heliothis control.
- ♦ Control of thrips.
- ♦ Alternative to endosulfan.
- ~ Fusarium wilt resistant link of snake beans.
- ~ Nematode control for snake beans.
- ~ Better Melon productivity on different trellis designs.
- ~ Pest Identification for growers.
- ♣ GMO Research - only needed if it (GMO food) is a problem eg. nutritionally or environmentally.
- ♣ Soil fumigants and Methyl Bromide research - there are still gaps in the research and priorities need to be set in this area.

QUALITY & MARKETING

- ❖ How do consumers feel about IPM and organic produced product?
- ❖ Market research to identify new markets.
- Value adding second grade fruit – what options are there?
- New product development – explore value adding, pre packaging and other opportunities.
- Cool Chain Management implementation past the transport through to the consumer.
- Export markets.
- Niche markets.
- # Research into cold room storage for Chokos – any other possible cold storage?
- # There is a need for a standardised QA description for each type of product.
- # Export new products (new to exports) – identify new markets.
- ◆ Microbiological limits – what is acceptable from the paddock to the plate?
- ◆ Cost of packaging need to be cheaper.
- ◆ Why can't we use second hand cartons?
- ♣ There is a need to increase the awareness of globalisation and what else is happening in the market places. Growers need to get together to supply.
- ♣ Market research is needed – case studies and available information . Identify innovation and opportunities. Make it all available to the industry, it is up to the individual to take hold of the opportunity if they see fit.

BUSINESS, FINANCIAL AND LABOUR MANAGEMENT

- Grower unity.
- Workers compensation premiums in arrears. – WHAT DOES THIS MEAN?
- ❖ Information on getting out of the industry all together.
- ❖ Better utilisation of backpacker labour.
- ❖ Need specialist staff to help with on farm training.
- ❖ Computers – using software on a day to day basis, is there vegetable industry specific software? Is that specific necessary?
- Alliances.
- Business and Market Development Service.
- Staff training (access to).
- Attracting new/young people into farming.
- # Chasing agents who go broke.
- ◆ Effluent recycling from the cities to be used on farms – not pumped out to sea.
- ◆ Some sort of labour control – perhaps a share/hire system, a pool of skills & reliable labour to draw on in the area (Gatton/Toowoomba).
- ◆ Overproduction and the end price the growers receive are the biggest issues to address.
- ♣ We need more focussed projects rather than broad brush industry activities. Identify the individuals (or businesses) and have commercial outcomes.

CONSUMER DEMANDS

- What does the final consumer want?
- ❖ Where is the demand for organics?
- ❖ What is the future for current vegetable products that generate waste in the market or the kitchen? This cost may not be worn by the consumer and require more processing or different harvesting on farm.
- ❖ Work with chain stores to develop better systems.
- ❖ Can the vegetable industry take advantage of being GST free?

- Production forecasting information would help regulate supply.
- # Consumer needs and consumer research.
- # Consumer education about real and perceived quality.
- # Development of charts on how to grow and use vegies.
- # 'Do' cards.

TRANSPORT

- Freight forwarding opportunities.
- Investigate the collaboration of sea freight companies on price fixing.
- ❖ R&D Levy to be used to address transport packaging that preserves quality.
- ❖ Establish harvest companies that organise the harvest and know the produce and it's handling requirements etc.. – negotiate with the Lockyer Producers Association.
- Bring back rail transport.

VEGETABLE INDUSTRY QUESTIONNAIRE 2001

INTERVIEWEE OCCUPATION:

Industry Priority List

- What do you feel are issues for the vegetable industry?

Prompt questions

- *What are the challenges facing the vegetable industry in Australia?*
- *As a vegetable grower, what do you feel would help improve the performance of the vegetable industry? (or your business?)*
- *If there was no money invested in the vegetable industry to improve/advance it, what constraints/limitations would pop up? Where would the industry fall down?*
- *What market trends do you feel will influence the industry?*
- *How do you think the industry can improve its position in the market place?*

- What do you feel are the most important needs/priorities for the Vegetable Industry? Why?

If you could pick the 3 most important, what would they be?

- What about possible solutions? What do you feel needs to be done to address these most important issues?
- What do you think of the industry list that was generated 2 years ago?

R&D – getting access to projects

- What do you know about the National Vegetable levy?
- Have you heard about any projects that your R&D levy has supported? Would you like to access this list? Would you use it? What form would you like to receive the information in?
- Do you feel that you are getting value for your levy money? No? Explain your perfect vision of getting value for your levy money.

Information Access and Services:**➤ Where/How do you access your information? Why?**

- ☐ Internet
- ☐ Good Fruit & Vegetables magazine
- ☐ QFVG News
- ☐ Vegetable News newsletter
- ☐ Other industry magazine/journal
- ☐ Television
- ☐ Newspaper
- ☐ DPI
- ☐ Field Days
- ☐ Other growers
- ☐ Other sources.....

➤ What type of information are you searching for?

- ☐ Production/agronomic
- ☐ Business
- ☐ Post harvest
- ☐ Consumer information
- ☐ Market information
- ☐ Quality Assurance information
- ☐ Other...

➤ Can you recall the Vegetable News newsletter that is published by the QFVG Vegetable Program?

No?

Yes? – Can you recall any articles or features?

- do you feel that this is a good information source?
- How can it be improved?
- Did you get value out of issue 5?

➤ How can we better deliver information to you? What format would you like to receive information?**➤ What are the top areas/issues that you would like to see regular information delivered to you and others in the industry?****➤ Would you like the information to be targeted to your interests and crops or broad brush spread?****➤ Do you feel there are gaps in information and services that are available and accessible? What?**

Prompt questions

- *Should there be an easier way to access information?*
- *Is there a big void in the information that is available?*
- *Have you searched for information before and come up with nothing?*
- *Who do you feel should be responsible for delivering this information to you?*
- *What can we develop to assist the growers not only in their information access but their general business and enterprise skills?*
- **What services would you like to be more readily accessible in your region? Why?**

- **Do you have access to the Internet? Or E-mail?**

- **Do you use it? How often?**

- **If not, would you like to know how to use it?**
- **Would you use it if there was something on there that is worth while accessing?**

- **What do you think of the Vegetable Update database? Would you use it or access it?**

General Industry Questions:

- **Do you think that the industry is changing? How? Do you feel that you can keep up? Would you like some help assessing and managing the changes?**

- **Would you like to increase the skills base of your business? Where? Would you pay for it? Who do you feel should provide this service?**

For example personal skills, staff management, marketing, business management, post harvest.

If yes - Ask for permission to pass on their name when this service is available in the area.

- **Would you like to learn more about increasing your businesses skills and value in supply chain management?**

- **Are you interested in networking and creating alliances with other growers to create more business opportunities and continuity of supply and quality for market access?**

If yes – ask for permission to pass on their name when this happens.

- **Have you ever had experiences working with other growers and businesses to coordinate supply either together or them to you or vice versa? Good or bad experience?**

VEGETABLE INDUSTRY TELEPHONE SURVEY

RegionX – 2001

INTERVIEWEE OCCUPATION:

R&D – getting access to projects

- **What do you know about the National Vegetable levy?**

- **Have you heard about any projects that your R&D levy has supported? Would you like to access this list? Would you use it? What form would you like to receive the information in?**

- **Do you feel that you are getting value for you levy money? No? Explain your perfect vision of getting value for your levy money.**

Information Access and Services:

- **Where/How do you access your information? Why?**

- ☐ Internet
- ☐ Good Fruit & Vegetables magazine
- ☐ QFVG News
- ☐ Vegetable News newsletter
- ☐ Other industry magazine/journal
- ☐ Television
- ☐ Newspaper
- ☐ DPI
- ☐ Field Days
- ☐ Other growers
- ☐ Other sources.....

- **What type of information are you searching for?**

- ☐ Production/agronomic
- ☐ Business
- ☐ Post harvest
- ☐ Consumer information
- ☐ Market information
- ☐ Quality Assurance information
- ☐ Other...

- **Can you recall the Vegetable News newsletter that is published by the QFVG Vegetable Program?**

No?

Yes? – Can you recall any articles or features?

- do you feel that this is a good information source?
- How can it be improved?
- Did you get value out of issue 5?

- **How can we better deliver information to you? What format would you like to receive information?**
- **What are the top areas/issues that you would like to see regular information delivered to you and others in the industry?**
- **Would you like the information to be targeted to your interests and crops or broad brush spread?**
- **Do you feel there are gaps in information and services that are available and accessible? What?**

Have you ever tried to find information and not come up with anything?

Prompt questions

- *Should there be an easier way to access information?*
- *Is there a big void in the information that is available?*
- *Have you searched for information before and come up with nothing?*
- *Who do you feel should be responsible for delivering this information to you?*
- *What can we develop to assist the growers not only in their information access but their general business and enterprise skills?*
- **What services would you like to be more readily accessible in your region? Why?**
- **Do you have access to the Internet? Or E-mail?**
- **Do you use it? How often?**
- **If not, would you like to know how to use it?**
- **Would you use it if there was something on there that is worth while accessing?**

Industry Priority List

➤ **What do you feel are issues for the vegetable industry?**

Prompt questions

- *What are the challenges facing the vegetable industry in Australia?*
- *As a vegetable grower, what do you feel would help improve the performance of the vegetable industry? (or your business?)*
- *If there was no money invested in the vegetable industry to improve/advance it, what constraints/limitations would pop up? Where would the industry fall down?*
- *What market trends do you feel will influence the industry?*
- *How do you think the industry can improve its position in the market place?*

➤ **What do you feel are the most important needs/priorities for the Vegetable Industry? Why?**

If you could pick the 3 most important, what would they be?

➤ **What about possible solutions? What do you feel needs to be done to address these most important issues?**

➤ **What do you think of the industry list that has been generated for your region?**

Prompt on the list from last year.

REGIONAL VEGETABLE INDUSTRY ISSUES – NORTHERN AUSTRALIA

2001

- Bowen and Burdekin
- Brisbane Metropolitan
- Bundaberg
- Fassifern Valley
- Granite Belt
- Gympie and Sunshine Coast
- Northern Territory

The majority of vegetable growing regions in northern Australia were included.

BOWEN AND BURDEKIN

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), regional visits were held from 15th to the 19th October 2001 in the Bowen and Burdekin regions to:

- Review and update the vegetable industry needs list.
- Identify what services need to be targeted into the region.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need such as where their levy money is invested.

These visits were to follow up the vegetable industry needs identification workshops that were held in the region in November 1999. The results of these workshops included that the industry has not been effective in getting information to the growers. Follow up from these workshops to date has included initiating the 'Vegetable News' newsletter, assisting other projects and programs to get information out to the industry, and ensuring that the information they asked for is accessible.

There were a total of 26 growers people interviewed including growers, chemical resellers, grower association representatives and Department of Primary Industry staff. All stakeholders received a list of national vegetable levy research and final reports available at QFVG. The results from the discussions are in Appendix 1 and a summary of key points is provided below. No names or details are associated with the comments to keep it anonymous. Having a semi-structured interview process provided great opportunity to talk about the issues that the growers and stakeholders feel strongly about. From talking to many people, it was easy to identify trends without having to ask some questions outright.

Many of the needs and issues on the original list were crossed off due to a number of reasons, for example, the information is now readily available or that it is no longer an issue for the industry (as was the case in the quality of transport and the need for quality assurance information). Issues were also added. The reviewed list for the Bowen and Burdekin region is in Appendix 2.

This information will be used to initiate services for the vegetable industry and be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and

APPENDIX 5

Vegetable Growers and AusVeg, to include in industry priority lists when initiating projects and reviewing and considering funding proposals.

KEY INDUSTRY ISSUES & RECOMMENDATIONS

Communication

- Accessing information about pest and disease management; value adding; how to produce new crops; .
- Information on where the Levy money is invested – we want to see real benefits delivered to the growers.
- E-mail is good to utilise to get information to growers, but still need to ensure those that don't have it still get the information.
- The research community is getting mixed messages about what industry priorities are and what size of projects they should submit.
- There is real lack of awareness about what is and is not funded/supported by the national vegetable levy and what Horticulture Australia is.
- Need to promote the services and information that are/is on the Internet.
- Research and development information – needs to be in a simple, grower friendly form. This information needs to get back to the grower better.

Information access is still a huge issue. The Vegetable Program needs to ensure they utilise the Fruit and Vegetable News more effectively as this one of the main magazines that the industry reads. However, the growers do not want to waste time sifting through information they don't want, they would rather receive the details on where to go to access particular information, to point them in the right direction.

There are many more growers using electronic communication and as expected, the frequency of use varies. Growers would like to communicate with QFVG via E-mail.

Many important industry participants and stakeholders do not get the information that the growers receive, one example is the annual reports. This information is often more useful to other people servicing the growers and the target audience of this communication material may need to be reviewed.

It was obvious that the research community needs clearer messages and guidance as to what the funding providers priority's are. The research personnel often develop projects closely with growers and other industry participation and they are more often than not, not funded. This is frustrating not only for the research community, but also for the growers who really need the work carried out and outcomes that can be used to improve their farm enterprises.

Recommendations

- It would be useful for the Vegetable Program to produce a reference sheet, in both hard and electronic copy, to point people in the right direction with a number of sources listed.
- *The Vegetable Program needs to develop and implement an electronic communication strategy that delivers useful information in this quick and resource friendly manner. It needs to be noted that the strategy must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want, leading to an expectation that there is nothing worth while contained in them and being instantly deleted. Also, E-mails must not be doubled up in hard copy.*

- E-mail would be a good way to get some R&D information out to growers and can compliment the Vegetable Update Database.
- Include all industry stakeholders and supply chain members in the information loop to assist in information dissemination.
- Establish an information dissemination network to better utilise established communication channels.
- Bring to Horticulture Australia to attention that clearer messages need to be communicated to the industry.

Education and Training

- Education for all members of the Supply Chain on handling and quality of produce.
- Growers need to increase their marketing skills.
- Pest and disease identification for growers.
- Many growers feel that it will be good to know how to use computers and Internet properly.

Recommendation

- Ensure QFVG are aware of the education and training needs and initiate the appropriate targeting of these services into this region.

Market Development

- Need better representation from QFVG on the export board.
- Ban fresh fruit and vegetable imports so we can consume more domestic product.
- Develop alliances so that growers can save on input costs.
- There is a general interest in networking with other growers, however a lot of hesitation about dealing with problems associated with it.
- There is a lot of export opportunity for value added products, growers and their businesses need to get out into the market and have a look for start talking and relationship building.

The area of market development, identification and skills, although a personal business decision, is still considered to be an area that requires a lift in performance by the whole industry.

Recommendation

- Ensure the key points are passed onto the industry organisations, particularly the Program Managers at QFVG to incorporate into programs and services offered to growers.

Pest and Disease Management

- Chemicals – need to have access to more for rotations.
- Tomato spotted wilt virus.
- Powdery mildew on capsicums.
- Sudden wilt in melons.

- Mosaic virus is a problem in cucurbits.
- Aphid control.
- Leaf minor.

Despite it being a particularly bad season for pest and diseases, not many were listed. The grower realise that most of it is weather related due to the lack of rain.

Recommendation

- Circulate the list to the appropriate organisations and industry bodies.

Political

- Labour is still a big problem for growers – accessing skilled and reliable labour.
- Transparency and accountability is needed by the chain stores to better deal with their monopoly.
- There is nothing in the wholesalers code of conduct for the growers.
- North Queensland representative requested for the National Vegetable R&D Committee.

There was much concern in the Bowen region about representation on the National Vegetable R&D Committee. It has been acknowledged by the Industry Development Officer that more effort needs to be made to include more of the industry in the R&D loop, and not just the 6 grower delegates. However, it should be noted that the delegate positions at QFVG are grower elected, and are in this position to represent the industry. Despite this, a review of the R&D committee with respect to the product groups that are represented, the crops they grow and their general knowledge and communication with other growers they represent should be undertaken.

Because of the process used to select R&D committee members in Queensland, the issue of the North Queensland person on the national R&D committee is political and needs to be addressed by the QFVG Vegetable Committee.

Recommendation

- Recommend to the QFVG Vegetable Committee that a review of the representation of crops and regions on the National Vegetable R&D Committee.

INDUSTRY COMMENTS FROM THE BOWEN AND BURDEKIN REGIONS

- Accessing information about pest and disease management and control to keep producing quality produce is difficult. There are no real management options that can help us. We need ready access to it if it is available. This season we have had blotchy fruit, shadow blight/grey wall, mite, SLW and leaf minor – bad year for quality.
- It would be good to know where our levy money has gone, probably let us know where to get the information.
- Access information by talking to other growers, consultants, seed companies, the DPI and sometimes on the Internet. Have been accessing market information from the Sydney Markets.
- Have tried to search for information on value adding like drying and saucing to see what may be an option for our business but the information was so hard to find. It would be good to have another source of income for the months that we are not harvesting.

- E-mail would be a good way to get information out to a lot of the growers. There are still some who aren't on e-mail yet.
 - Use the Internet for banking, pays and some information searches but get frustrated with having to sift through a lot of garbage.
 - Have tried networking and alliances with other growers but got out of it. There was not enough control over what was happening (we weren't happy with a lot of it) and we weren't getting enough benefit out of it. We are looking at computer aided marketing of our produce in collaboration with other producers.
 - There is little information available about how to produce new crops. For example we were ahead of the DPI in knowing how to produce gourmet tomatoes.
 - We are pretty happy with the way our marketing is going, we do our own. Marketing is an individual, personal, business thing.
 - Don't export, mainly domestic.
 - We do want to be able to ring QFVG and get the information we want. Have never thought of ringing QFVG as we have a problem before, we usually turn to local people because we need someone to look at our crop most of the time.
 - Don't like promotions being targeted to big cities in other states as the interstate growers get the benefit too and don't pay the levy. May be QFVG should have a system in place where all producers pay the levy and get equal promotions.
 - Education for all members of the supply chain about handling and quality of fruit.
- Industry issues include a lack of marketing skills amongst the growers, silverleaf whitefly for many growers in the district, labour (accessing skilled and regular labour), chemical registrations for products to use in rotation (overuse of the few chemicals that are available is not helping the situation either), seed supply in some crops (this is a seed company problem),
 - Need better representation from QFVG on the export board.
 - There is confusion about what levy's go where in Qld.
 - Consultant is a good source of information on R&D issues and projects. But a list would be helpful too.
 - Access information via the Internet, QFVG magazine, Vegetable News newsletter and local consultants.
 - E-mail is a good way to receive information.
 - Marketing is an issue that growers need to know more about ie. how to market. But I don't know that they would take up the offer to learn more about it.
 - Use the Intranet sometimes, but it seems to take so long to find the information sometimes. Some connections are slow.
 - Have looked into networking with other growers and working together on a couple of occasions but decided against it because of people issues and other difference like not liking their quality of produce or the way they run their operation.
 - Think the DPI in Bowen are a waste of time.
 - Have a problem with the Water Use Efficiency project here in NQ (the field officer)
- Building alliances and having chemicals registered are pretty big issues.
 - Can name some levy funded projects.
 - E-mail would be a good form of communication. Not many grower aren't on it.
 - Get information from QFVG magazine, Vegetable News, DPI.
 - Currently looking into networking with other growers.
- Silverleaf Whitefly and having chemicals to rotate for it's control is a major issue for the region.
 - Loss of funding for projects is pretty devastating.
 - Growers often travel to the DPI site to see trials. Not so many trial on growers property's due to contractual agreements that need to be drawn up and signed and it's gets very complicated.

- When Bowen DPI gets an extension officer they will probably have to cover up to the Ayr region.
- Looking at setting up a research committee of growers and DPI to see what the growers want researched and to communicate with them better.
- We use the DPI and the Internet for information, some of the Internet information we have to pay for.
- We need a transparency act for the increases in costs the growers have to deal with and the monopoly that the chain stores have. Needs to be more transparent and accountable.
- There is nothing in the Wholesalers Code of Conduct for the growers.
- We need a market in the north to cope with the costs of transport and the poor quality that gets shipped back up here after we transport it to Brisbane. This needs to be a joint effort by all involved in NQ.
- Wages and superannuation rises are an issue for growers and the running expenses of their businesses.
- We need to ban fresh fruit and vegetable imports so that we can consume more of our own produce and compete better with globalisation.
- All of the above will help small crop growers in the Burdekin become more viable.
- We need to form an alliance to save on input costs.
- Promotions levy shouldn't exist for vegetables.
- To see value for levy money we want to see real results that benefit us and a representative in the NQ region.
- Are interested in networking to supply year round for export. We will grow anything.
- Business Plan – how? What's in it?
- Are interested in the Women in Horticulture Network.
- Extension officer is needed in NQ.
- TSWV is a problem.
- Confusion around what levies are paid in Qld and where they go and what they are used for.
- Would be good to send us a list of R&D so we can have a look.
- We need services to assist growers financially, they are going broke and need help to get out of the industry. But they are proud people and probably won't take up the offer.
- Great comments about Janine Clark and her project.
- DPI Ayr are short staffed and need an Extension Officer so that there is a more effective two way flow of information to the growers.
- Powdery Mildew on capsicums work – sulphur is not working for management.
- Sudden Wilt in Melons, particularly Honey Dews is a problem, to the point where it can't be grown any more.
- John Brown has not heard about any WA input for his project, after being asked frequently to include it in his information dissemination.
- Roland Holmes had been running workshops for growers, this has included some insect and disease identification work.
- DPI are getting mixed messages – do we put together big or small projects? Small ones are asked to be joined and big ones are said to be too expensive!
- It would be good if we could get a corporate agreement across crops (eg. Grains) on management of pests like heliothis.
- Ayr research station is looking at working on organics.
- Mosaic virus (cucurbits) and SLW are the major problems in the Burdekin, not a lot you can do about either though, DPI projects don't seem to be turning up much good.
- We are controlling aphids by spraying so trying to control mosaic too.
- We are trialing virus resistant plants in the region.
- We get our pest and disease information from the DPI.
- Investment of the levy money? Somebody's got to do it.

- DPI have organised the farmers market once a month in Townsville, this has so far been very worth while.
- Also have produce at other local markets. Produce sells very well at these (fresher than what you buy in the supermarket).
- There is a lot of information around and it is quite easy to access it, all you have to do is look or ask.
- There is a lack of awareness about branding of levy projects.
- We get information from the QFVG magazine, Vegetable News and the DPI.
- Get information out by utilising the QFVG magazine and as you have been. Don't send any more papers.
- It would be useful to know how to use the Internet and the computer better.
- We are just starting to use the Internet and e-mail.
- Need to promote the Vegetable Database more so people know it is around.
- Not really interested in networking with other growers, am happy doing what I'm doing.
- We are working with other growers to supply the markets with produce.

- The Burdekin growers need an Extension Officer to assist and the pathologist up here.
- Growers need to cut back on how much they grow.
- R&D funds need to be made more available.
- SLW work needs to be sped up.
- Grower awareness on how to identify pests and diseases is lacking.
- DPI are always running workshops on anything and everything and they aren't very worth while. Need specific workshops like to teach growers how to market properly.
- Growers read QFVG magazine a lot.
- Want to know what R&D is out there and where to access the information. Send the bare details so we can follow it up.
- We get our information from networking, we have been in the industry a long time and know a lot of people.
- Vegetable News has had good articles and I read what interests me.
- Deliver information in a simple and easy format.
- Do have access to the Internet but don't use it very often.

- Freight costs are an issue up north, we are less competitive because of our distance.
- Being QA accredited and having chemical certificates – there is not incentive or returns for the investment.
- Mosaic virus has been a real problem (squash).
- Know little of the national vegetable levy.
- Deliver info on R&D in simple form.
- Do believe we are getting some value for our levy money.
- Get information from QFVG magazine, Vegetable News, DPI
- Put information in QFVG magazine.
- Would like to know what is happening in other districts. This can help with our management and having general knowledge about what is going on in the industry.
- Would like to know how to use the Internet and computer better, are still learning.
- Not really interested in networking and supplying with other growers because it has it's problems such as mixing quality produce and working with people you can't cope with.
- How much levy do I need to pay for my produce? Where do I find out?

- Information, particularly R&D, needs to get back to the growers better.
- The ceasing of funding in Qld is a big concern.
- Keeping Des McGrath and Subra's projects are a must.
- We use the DPI sometimes for information, mostly our consultants (BCMS) and our own experience.
- Marketing for growers is an individual thing.
- Have more R&D information in the QFVG magazine and tell people where to get it.

- There are value adding opportunities for the industry, but it has to be a group thing. We would be interested in getting involved. We may even have to grow different varieties to suit.
- The future for the tomato industry is in export. There are export markets out there for value added products.
- There is opportunity to value add other vegetables in the Bowen region, but you need to seriously look at shelf life and distance to travel.
- Growers need to get out there and look at the market opportunities for themselves.
- We need more access to information about R&D.
- Aphids have been a big problem this year.
- Labour has also been a bigger problem than normal this year.
- There is heaps of opportunity to work together with other growers to take hold of opportunities.
- Information needs to be in a grower friendly easy to find format.
- I get frustrated with sifting through the Internet for information.
- I log on to e-mail once a week.
- The Vegetable Update Database is a good idea.
- We use the DPI a lot for information.
- We need to do something about the capsicum workshop outcomes.
- GREAT concern about not having a North Qld representative on the national R&D committee.
- At the moment I (Sam H) am the vehicle to take issues forward to the national R&D committee.
- Send R&D committee list to Lyn Orton.
- Leaf Minor in crops has been an issue this season, as with all pests – weather related.
- The executive of the Bowen District Growers Association could not tell me what the major issues for Bowen growers are in general, other than the need to have a representative on the R&D committee. They feel that this needs to be addressed by individual crops.
- Send QFVG Annual report to Lyn Orton.
- The executive said that a workshop(s) will need to be run to ensure the growers get a say and are in the right thinking mode. Sam H said that she did this and nobody turned up. So this is why I am seeing people one on one and even when I do this the growers are too busy to talk. It was suggested that it was the wrong time of year, Sam H asked if there was ever a good time of year and the general feeling was 'no'.
- Sam H suggestion to include them in the R&D loop was accepted (send them a list of the proposals (not the actual document as they are confidential) and talk to them about their input.
- Sam H said that there is no quick fix solution to putting a NQ representative on the national R&D committee and the prospect of this happening in the near future is low. This is a political issue to take up with QFVG and all she can do is put a recommendation in her report.
- Growing for profit is wanted in North Queensland.

VEGETABLE INDUSTRY ISSUES 2001 – BOWEN & BURDEKIN

Business and Financial Management and Labour

- Building alliances in the industry and having skilled business that can lead to re-structuring businesses with grower advantage.
- Business education and training.
- Computer courses for MS Word and Excel and there were some who mentioned the Internet.
- Education and training for networking with growers and improved marketing.
- Greater research into overseas business and exporting
- Government help (subsidies) for growers to deal with paper work
- Backpackers are needed for labour – government needs to let more in
- Workshops on the Internet and using it to benefit your business and for marketing for growers and younger generation

Quality and Marketing

- Chemical free disinfestation research.
- Grower networking and a more united approach across industry.
- Developing viable export markets and getting government assistance.
- Increase grower awareness and knowledge of supply chain – take them to the markets!
- Enlist the help of DPI to help with more information on how to access government funds.
- Focus on taste as well as quality. Educating the supermarkets and growers, breeders on this (taste not quantity).
- People like Shane Comiskey helping to achieve cohesive grower groups
- Educate all members of the supply chain.
- Assist growers take hold of opportunities like value adding and export market access.
- Increase marketing skills of growers.
- Alliance development to save on input costs.
- Identification of market opportunities

Production

- Registration of new chemicals for rotation – to achieve lower pesticide residues.
- New registrations for safer pesticides.
- Soil health projects.
- Develop mechanics in consultation with engineers
- Industry adoption of production needs
- Money for breeding of better cultivars
- Rely more on non-chemical alternatives
- Research into problem diseases that are affecting the farmers in a short period of time.
- Research into disease free crops which will mean a viable future for upcoming generations.
- Nimrod (powdery mildew spray) needs to be registered
- Breeding resistant varieties to Downy Mildew
- Mosaic virus control and management
- Utilising better pest management strategies to reduce costs on chemicals ie. pest monitoring etc.
- Tomato Spotted Wilt Virus
- Powdery Mildew in capsicums
- Sudden wilt in melons

- Mosaic Virus
- Aphis control
- Leaf Minor control

Communication

- Dissemination of information, new technology.
- More information on long term sustainable farming systems.
- Increase awareness and skills and pest and disease identification for growers.
- Accessing information on value adding, producing new crops and pest and disease management.
- Information on where the levy money has been spent.
- Better industry adoption of new technology.

BRISBANE METROPOLITAN

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), regional visits were held from 8th to the 12th November, 2001 in the Brisbane metropolitan region to:

- Review and update the vegetable industry needs list.
- Identify what services need to be targeted into the region.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need such as where their levy money is invested and information other than agronomic.

This visit was to follow up vegetable industry workshops held over the last two years that identified industry needs and gaps in information and services and provided growers with options to try and fill these. While these workshops have provided good feedback and comments, it is still recognised that more needs to be done to keep the industry up to date and informed of research and development activities and other important information that is available that can assist in improving the performance of their businesses.

All stakeholders received a list of national vegetable levy research and final reports available at QFVG. The results from the discussions are in Appendix 1 and a summary of key points is provided below. No names or details are associated with the comments to keep it anonymous. Having a semi-structured interview process provided great opportunity to talk about the issues that the growers and stakeholders feel strongly about. From talking to many people, it was easy to identify any trends without having to ask some questions outright.

Many of the needs and issues on the original list were crossed off due to a number of reasons, for example, the information is now readily available or that it is no longer an issue for the industry. Issues were also added. The reviewed list for the Brisbane region is in Appendix 2.

This information will be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers and AusVeg, to include in industry priority lists and used when initiating projects and reviewing and considering funding proposals.

KEY INDUSTRY ISSUES & RECOMMENDATIONS

Communication

- *There is little useful information around on Hydroponic systems.*
- *Fruit and Vegetable News and Good Fruit and Vegetables are the most read industry publications.*
- *Growers prefer targeted information that is applicable to their crops.*
- *There are requests for information that is already available.*
- *The Internet is not widely used among growers in this region.*
- *IAMA and Primac representatives are regularly in touch with the growers.*
- *Growers don't think to call QFVG if they have a problem or want information.*

The issue of information access was prominent in this region, but not a huge issue for most of the growers. The Vegetable Program needs to ensure they utilise the Fruit and Vegetable News more effectively as this one of the main magazines that the industry reads. However, the growers do not want to waste time sifting through information they don't want, they would rather receive the details on where to go to access particular information, to point them in the right direction.

Growers have regular contact with reseller representatives. This relationship could be utilised in establishing a communication network to keep the industry as informed as possible with the latest updates in research and development. It would also benefit the representatives to know where to go for information and resources when growers ask.

The use of the Internet and e-mail was varied, but on the increase. I don't feel this would be a reliable way to communicate with growers in this region.

Recommendations.

- *It would be useful for the Vegetable Program to produce a reference sheet (or the like), in both hard and electronic copy, to point people in the right direction for information and services, with a number of sources listed.*
- *The Vegetable Program needs to develop and implement a communication strategy that delivers useful information to an established network made up of key industry players. Most of these people are on e-mail and hence dissemination would be quick and resource friendly. It needs to be noted that the strategy must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want, leading to an expectation that there is nothing worth while contained in them and being instantly deleted. Also, e-mails must not be doubled up in hard copy.*
- *When advertising or promoting events, ensure all appropriate media are used for the whole target region.*
- *Include all industry stakeholders and supply chain members in the information loop to assist in information dissemination.*

Market Development

Growers recognise that there is opportunity in the industry to work together for market supply and other reasons, but they generally thought that this region was too small. Some growers are doing this on their own with other regions.

Recommendation

- There is opportunity to work with some individual growers to improve their supply chain relationships. Ensure QFVG services in this area are promoted well.

Pest and Disease Management

No R&D issues were raised in this area.

Political and QFVG Specific Issues

- Labour – finding good and reliable labour.

Recommendation

- Ensure QFVG receive this information.

Production

- Trace elements for parsley and radish.

Recommendation

- Ensure this information is added to the industry priority list.

INDUSTRY COMMENTS FROM THE BRISBANE REGION

- Nothing has really changed since last time, no new issues
- Information from doing our own research and trial and error.
- Rarely read industry publications, not much benefit in the information for our hydroponic business.
- Use the DPI if we need to identify pests or diseases.
- We work closely with our agent for marketing and tactics
- There are no Hydroponic industry publications.
- The Hydroponic association is of no benefit to us.
- Read Fruit and Veg News
- Good Fruit and Vegetables is the best industry magazine.
- Nothing has really changed since last time, no new issues.
- Are members of the Qld Hydroponic society.
- Would like to know about shavings in hydroponic systems.
- Methyl Bromide information would be useful – what's happening?
- Herbs don't get a lot of attention when it comes to levy funding. If we could have it spent on herbs it would be on chemical alternatives and export market development – helping growers get into it.

- Labour is our biggest issue. It needs to be reliable. It is the biggest issue holding use back from expanding. Can there be an easier alternative to finding labour?
- Trace elements and nutrient requirements for parsley and radish – there doesn't seem to be anything around.
- QRAA/Farmbis subsidies for farmers for business management courses? Computers? Wages?
- Fleet buy farm vehicles or even a broker for growers.
- Holiday retreat for growers to read all the information!
- Parsley wine making.

- What endive trials have been carried out? There was some done in Toowoomba?
- Water for Profit information and want to talk to someone about it.
- We want targeted information that suits our crops.
- What alternatives are there to Methyl Bromide?
- Info on weeds and pests and diseases.
- How do you compost organic manure?

- F&V News & DPI (Gatton) for information
- Project leaders can be contacted directly
- Do use the Internet to search for information
- Do network with other growers to supply.
- There are no real Pest and Disease problems that aren't weather related.
- Never had information that I wanted that I couldn't find.
- Would be good to keep IAMA and PRIMAC rep's in the loop.

- IAMA – Rocky Point Farm Supplies: Would like to be included in the information loop.
- The chemical (CPA) information is great.
- Do have enquires from growers that we don't know how to answer and being in this loop would help us and the growers know where to go.

- Thrips has been a problem this year, but it is weather related.
- Off label permits in QFVG news are great.
- Don't think to call QFVG first for information, not really second nature.
- Do know where to go to get information and where the levy is spent.
- Big business is flooding the market and they decrease the prices even for themselves – this is a problem.
- Don't network with other growers for supply.
- Is opportunity in the industry to network, but probably not for this region.
- Read F&V News.
- Growforce and other rep's are used for information.
- Usually ask around the district first if we have a problem.
- Supply to fresh cuts (cabbage) but the relationship is not as good as it could be.
- Would be interested in assistance to build business relationships.
- Do cruise around the Internet a fair bit.
- Don't really use e-mail.
- Will look at the Vegetable Update database when it is active.
- Only supply domestic.

VEGETABLE INDUSTRY ISSUES 2001 - BRISBANE

Production

- Trace element requirements for parsley and radish.

Communication

- There is a lack of awareness about R&D for this region.
- Establish an effective communication network that reaches this region.
- Growers need to be aware of what services are available to them to improve their business performance and supply chain relationships.

Political

- Finding good reliable labour is one of the biggest problems for farm businesses.
-

Fassifern Valley

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), regional visits were held during November 2001 in the Fassifern Valley region to:

- Review and update the vegetable industry needs list.
- Identify what services need to be targeted into the region.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need such as where their levy money is invested and information other than agronomic.

This visit was to follow up vegetable industry workshops held over the last two years that identified industry needs and gaps in information and services and provided growers with options to try and fill these. While these workshops have provided good feedback and comments, it is still recognised that more needs to be done to keep the industry up to date and informed of research and development activities and other important information that is available that can assist in improving the performance of their businesses.

All stakeholders had received a list of national vegetable levy research and final reports available at QFVG. The results from the discussions are in Appendix 1 and a summary of key points is provided below. No names or details are associated with the comments to keep it anonymous. Having a semi-structured interview process provided great opportunity to talk about the issues that the growers and stakeholders feel strongly about. From talking to many people, it was easy to identify any trends without having to ask some questions outright.

Many of the needs and issues on the original list were crossed off due to a number of reasons, for example, the information is now readily available or that it is no longer an issue for the industry. Issues were also added. The reviewed list for the Fassifern Valley region is in Appendix 2.

This information will be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers and AusVeg, to include in industry priority lists and used when initiating projects and reviewing and considering funding proposals.

KEY INDUSTRY ISSUES & RECOMMENDATIONS

Communication

- Use QFVG to get information out.

- *Computers are not widely used for the Internet and e-mail in this region.*
- *Consultants and DPI are not used for information or management assistance.*
- *Local knowledge and asking neighbours is the most popular first step if growers have a problem.*

While growers in the Fassifern Valley seem comfortable with the range and access to information, the recall of R&D projects is generally not high. As using QFVG was the most popular response when asked how to get information out, The Vegetable Program needs to ensure they utilise the Fruit and Vegetable News more effectively. However, the growers do not want to waste time sifting through information they don't want, they would rather receive the details on where to go to access particular information, to point them in the right direction.

The grower associations are not very active in this region and would be no use in assisting to disseminate information. Perhaps rural suppliers or resellers could assist.

Recommendations.

- *It would be useful for the Vegetable Program to produce a reference sheet (or the like), in both hard and electronic copy, to point people in the right direction for information and services, with a number of sources listed.*
- *The Vegetable Program needs to develop and implement a communication strategy that delivers useful information to an established network made up of key industry players. Most of these people are on e-mail and hence dissemination would be quick and resource friendly. It needs to be noted that the strategy must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want, leading to an expectation that there is nothing worth while contained in them and being instantly deleted.*
- *Include all industry stakeholders and supply chain members in the information loop to assist in information dissemination.*

Market Development

- Marketing, value adding and technology development is an important focus for the industry.
- Marketing is a personal thing, and you need to provide growers with the options available and let them make their own decisions.
- Growers need help to become better business people.
- Most growers in the Fassifern Valley are currently networking for supply.
- A lot of growers need to be taught how to network.

Recommendation

- *Continue to carry out market development activities focussed on market access and value adding, building long term business relationships and alliances, to assist businesses take hold of opportunities.*
- *Ensure growers are aware of the options available for improving business performance.*

Production and Pest and Disease Management

- Snow pea varieties are needed.
- More control and products available for thrips. There are few chemicals registered for snow peas.

- Chemicals - Insecticides and fungicides – withholding periods need to be less than 7 days for snow peas as we are picking every 4 – 5 days in warm weather and 6 days in Winter.

Recommendations

- Circulate the list to the appropriate organisations and industry bodies.
- Make appropriate additions to the industry priority list.
- Ensure Janine Clark from the QFVG Pest Management Project receives this information.

General

- The margin between what growers receive and what the supermarkets charge is one of the biggest industry concerns.

Recommendation

- Add this issue to the national vegetable priority list.

INDUSTRY COMMENTS FROM THE FASSIFERN VALLEY REGION

- Levy should go towards anything agripolitical that stands up for the growers.
- Marketing and value adding is an important focus. The marketing is also a personal thing, the growers need to know what options they have available.
- Pest and Diseases – there is nothing that isn't already being addressed in research.
- We are getting value for our levy money.
- QFVG may be the best way to get the information out.
- Don't use computers or e-mail.
- Don't use consultants or the DPI.
- Use local knowledge and figure it out ourselves.
- Network with other growers for supply.
- Growers need to know about the options available for marketing and being better business people.
- Freshcare and QA – need a simple one only systems for all of horticulture. QFVG should have addressed this when it first came out and not let it get out of hand.
- Thrips have been bad this year, but because it has been a dry season.
- We do need more control options and products to use.
- Insecticides and fungicides – withholding periods need to be less than 7 days for snow peas as we are picking every 4 – 5 days in warm weather and 6 days in Winter.
- There are few chemicals registered for snow peas.
- Water availability and allocation is an issue in this region.
- Am part of a year round supply network with growers in Victoria.
- QFVG magazine is probably the best way to get info out.
- Seed varieties for snow peas are needed.
- Need to go to the US to look at more varieties.
- Sourcing labour is OK but the costs are increasing.
- Do some export to New Zealand but it is a small window.
- There are export opportunities in Asia, but the return is not always worth it.
- Retail margin – what the supermarkets get vs what the growers get is probably the biggest issue.

- Pest Management and the return growers get Vs what the supermarkets charge are the biggest industry issues.
 - The promotions levy – do the retailers contribute? They get the most value out of it.
 - Work with a grower in the Granite Belt for year round supply.
 - Do some export.
 - Definitely room for coordination of growers for supply.
 - Don't use the Internet or e-mail.
 - Need good relationships with the people you do business with.
 - We are getting value for our levy money, we need to continue R&D.
 - Read a lot and ask other people for information.
-
- R&D levy is used to fund projects – but the projects need to be industry driven.
 - Can name projects that are funded.
 - It is debatable if we are getting value for our levy money, I think there is too much pressure to spend it all every year when there is opportunity to have it more focussed and carry some over.
 - Use the Internet a bit – when there is something interesting and worthwhile to look up.
 - Word of mouth travels quickly.
 - We get asked to attend a lot of functions and seminars – we are lucky to be in the loop of what's happening.
 - We keep an eye out for new technology and products.
 - Can recall the Vegetable News newsletter.
 - Nobody want to read full reports. Point them in the direction of where to get information.
 - Top areas for me are marketing and value adding technology.
 - Like to know what's going on in the overall industry, if you receive too much targeted information you can get stuck just thinking about what immediately going on around you.
 - Information I receive needs to be relevant to my business, today.
 - Top 3 issues would be – marketing, value adding and teaching growers how to network. R&D may need to be more flexible to address this.

VEGETABLE INDUSTRY ISSUES 2001 – FASSIFERN VALLEY

Business and Financial Management and Labour

- Help growers network together better.
- Growers need help to become better business people.

Production

- Snow pea varieties are needed.
- More control and products available for thrips. There are few chemicals registered for snow peas.
- Chemicals - Insecticides and fungicides – withholding periods need to be less than 7 days for snow peas as we are picking every 4 – 5 days in warm weather and 6 days in Winter.

Quality and Marketing

- Marketing, value adding and technology development – need to let the growers know what their options are and what is available.

Political

- The margin between what growers receive and what the supermarkets charge is one of the biggest industry concerns.
-

Granite Belt

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), discussions with growers and other industry stakeholders were held during November, 2001 in the Granite Belt region to:

- Review and update the vegetable industry needs list.
- Identify what services need to be targeted into the region.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need such as where their levy money is invested and information other than agronomic.

These discussions followed up vegetable industry workshops held over the last two years that identified industry needs and gaps in information and services and provided growers with options to try and fill these. While these workshops have provided good feedback and comments, it is still recognised that more needs to be done to keep the industry up to date and informed of research and development activities and other important information that is available that can assist in improving the performance of their businesses.

All stakeholders had received a list of national vegetable levy research and final reports available at QFVG. The results from the discussions are in Appendix 1 and a summary of key points is provided below. No names or details are associated with the comments to keep it anonymous. Having a semi-structured interview process provided great opportunity to talk about the issues that the growers and stakeholders feel strongly about. From talking to many people, it was easy to identify any trends without having to ask some questions outright.

Many of the needs and issues on the original list were crossed off due to a number of reasons, for example, the information is now readily available or that it is no longer an issue for the industry. Issues were also added. The reviewed list for the Granite Belt region is in Appendix 2.

This information will be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers and AusVeg, to include in industry priority lists and used when initiating projects and reviewing and considering funding proposals.

KEY INDUSTRY ISSUES & RECOMMENDATIONS

Communication

- *There is a general lack of awareness of what projects the national vegetable levy supports.*

- *Industry publications and services are utilised for information access.*
- *Consultants, spray companies and representatives are also a source of information for some growers.*
- *Providing targeted information is more popular than providing information that covers all crops. However, it was recognised that benefits can be gained by finding out what occurs in other crops and industries.*
- *Internet seemed to be more regularly used in this region as compared to others.*

Despite the general low recall of projects, the growers seemed to have a fair idea about where to go if they want the information. There are mixed opinions about whether the industry or individual growers are getting value for the levy investment. Perhaps an increase in publicising what projects are supported by the levy and promotion of the real on-farm benefits that growers receive, could improve this perception.

The Vegetable Program needs to ensure they utilise the Fruit and Vegetable News and other industry publications more effectively. However, the growers do not want to waste time sifting through information they don't want, they would rather receive the details on where to go to access particular information, to point them in the right direction.

Recommendations.

- *It would be useful for the Vegetable Program to produce a reference sheet (or the like), in both hard and electronic copy, to point people in the right direction for information and services, with a number of sources listed.*
- *The Vegetable Program needs to develop and implement a communication strategy that delivers useful information to an established network made up of key industry players. Most of these people are on e-mail and hence dissemination would be quick and resource friendly. It needs to be noted that the strategy must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want, leading to an expectation that there is nothing worth while contained in them and being instantly deleted.*
- *Include all industry stakeholders and supply chain members in the information loop to assist in information dissemination.*

Market Development

- *There is opportunity to get growers to network together better.*
- *Growers need help to market their produce.*
- *There needs to be an industry approach to export.*

Recommendation

- *Continue to carry out market development activities addressing market access, working together, and building long term business relationships and alliances, to assist businesses take hold of opportunities.*
- *Let the growers know what is available to assist them.*

Pest and Disease Management

No pest or disease problems were mentioned.

Post Harvest

- Packaging costs. Can the industry move to recyclable crate and bins to decrease this part of the cost of production?

Recommendations

- Add this to the industry issues list.

Political and QFVG Specific Issues

- Why should we be paying superannuation for backpackers when they are going to leave the country?
- The monopoly of the supermarkets. How much they charge and consumers pay compared to what the growers receive.
- Can QFVG do anything to promote smaller fruit shops?
- Wages and superannuation and the extra paperwork.
- Collecting child support for the employees – creates more paperwork.
- Would be better if we didn't spend any money to make it easier to grow!
- Packaging costs. Can the industry move to recyclable crate and bins to decrease this part of the cost of production?
- Increase the prices that the grower receives.
- Agents should be specialised and deal in particular produce.

Recommendation

- Ensure QFVG receive this information.

INDUSTRY COMMENTS FROM THE GRANITE BELT REGION**What do you know about the National Vegetable levy?**

- Very Little
- I know that I pay it. I guess a lot goes towards R&D.
- Not a lot.
- Know but don't know what rate.
- Want all growers to contribute so we have funds
- Matched dollar for dollar from the Govt.
- Want it to be used more coordinated.
- A fair bit.

Have you heard about any projects that your R&D levy has supported? Would you like to access this list? Would you use it? What form would you like to receive the information in?

- Would like to know where to access the information.
- Seen the list. Concerned that a lot of the work gets redone.
- Pest management – Janine Clark.
- What I read in F&V News.

- Yes. The list wouldn't be too useful.
- Put it on the web page and let people know it's there.
- Clubroot control.
- Lettuce varieties and other research.

Do you feel that you are getting value for you levy money? No? Explain your perfect vision of getting value for your levy money.

- Yes, historically it has been good. If there was no research done where would we be? A lot is also done commercially and private eg by the seed companies.
- Not really. Some of the projects are airy fairy. They don't address the day to day things that really concern any business. Want information we can use on farm.
- Would like to see more Clubroot research. There is more to be done yet (GMO technology to fix it?)
- Promotion levy is not giving value back to individual growers, the industry and the consumers get the value.
- R&D doesn't give us better prices, which is what growers want.
- It is still becoming too easy to grower – the less price that we receive.
- No. Too much red tape to deal with for us to get our value.

Where/How do you access your information?

- QFVG Magazine
- Growsearch
- Good Fruit and Vegetables Magazine
- Internet
- 'Farmwide' Internet site, although it is very broad.
- Spray companies and rep's.
- Vegetable News newsletter.
- Wife does all the reading.
- Use a consultant.
- Have agronomists on staff.

What type of information are you searching for?

- General information that covers everything!
- We do our own market research and we even have people coming to us.
- All types, including packaging, pest and disease and value adding.
- Anything. This information gets to you and it's up to the individual to know whether it is useful for you or not.
- If you have a particular problem you then go and search.

Can you recall the Vegetable News newsletter that is published by the QFVG Vegetable Program?

- Yes can recall it. Flick through it.
- Yes can recall it but no articles. Flick through it.
- No.

How can we better deliver information to you? What format would you like to receive information?

- Provide a list of what is available is the best thing. Headings and titles and contact phone number.
- QFVG Magazine.
- Targeted information as 90% of what we receive is not relevant or useful.
- Growers that are interested, you would hope that they ask for it.
- Information spreads pretty quickly – look over the fence or the resellers.
- Look at providing information to the consultant (David Carey), GrowForce and WesFarmers.
- Fax is better than e-mail. Fax is instant. Have it as a short story.

What are the top areas/issues that you would like to see regular information delivered to you and others in the industry?

- Heliothis
- Silverleaf Whitefly
- Pest and Diseases
- New Chemicals
- Want to hear about it when it happens, not months later.
- Clubroot.
- Pest management excellent already.

Would you like the information to be targeted to your interests and crops or broad brush spread?

- Targeted is better because you take more notice of it.
- Crop specific is better. Across commodity information too that is specific focus like value adding.
- Information on any vegetable production that lets us know what's going on in the big picture.
- What is QFVG doing about overcoming the chain store monopoly?
- We grow too much stuff now, it is too easy to grow. We want better prices for what we've got.

Do you feel there are gaps in information and services that are available and accessible? What?

- Not really. Am more concerned about the new information that is coming out.
- No, not with Growsearch.
- Yes. Effluent water and the quality. Drainage water is high in nitrates.
- There is a lot of information around if we want it.
- No.

Do you have access to the Internet? Or e-mail?

- E-mail – receive them but don't send them.
- Internet – use the spray company sites for labels etc. and the weather sites. Used regularly, probably twice a week.
- Internet more than e-mail used.
- Yes, every day.
- Not really. Have access to it but don't use it regularly.

What do you feel are issues for the vegetable industry?

- The increased costs are the biggest concern for the industry.
- There is opportunity to network and work together better but you need a group of dedicated growers who are committed to it.
- We can grow it, we need to address the market side of things. Help growers to do it.
- There needs to be an industry approach to export. Networking interstate for continuity.
- Why should we be paying superannuation for backpackers when they are going to leave the country?
- The monopoly of the supermarkets. How much they charge and consumers pay compared to what the growers receive.
- Can QFVG do anything to promote smaller fruit shops?
- Wages and superannuation and the extra paperwork.
- Collecting child support for the employees – creates more paperwork.
- Would be better if we didn't spend any money to make it easier to grow!
- Packaging costs. Can the industry move to recyclable crate and bins to decrease this part of the cost of production?
- Increase the prices that the grower receives.
- Agents should be specialised and deal in particular produce.
- Instead of money spent on eg. New celery varieties, why not spend it on helping out things like celery burn on the people that pick it? Stuff that's really useful on the farm?

VEGETABLE INDUSTRY ISSUES 2001 – GRANITE BELT

PRODUCTION

- Water reliability.
- Information on incorporating organic and IPM principles into production practices. Not to become accredited, but to utilise the principles.
- Packaging costs – move to recyclable crates and bins to decrease costs.
- Would be better if we didn't spend any money to make it easier to grow!
- Instead of money spent on eg. New celery varieties, why not spend it on helping out things like celery burn on the people that pick it? Stuff that's really useful on the farm?

QUALITY & MARKETING

- Investigate options for value adding second grade fruit.
- New product development – explore value adding, pre packaging and other opportunities.
- Cool Chain Management implementation past the transport through to the consumer.
- Growers need help to market their product better.

BUSINESS, FINANCES & LABOUR

- Alliances, get growers to network together better.
- Access to staff training resources.
- Attracting new/young people into farming.

Communication

- There is a need to increase awareness of where the vegetable levy is invested.

Political

- Why should the growers be paying superannuation for backpackers when they are going to leave the country?
- The monopoly of the supermarkets. How much they charge and consumers pay compared to what the growers receive.
- Agents should be specialised and deal in particular produce.

GYMPIE AND SUNSHINE COAST

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), regional visits were held from the 30th to the 31st October, 2001 in the Gympie and Sunshine Coast district region to:

- Review and update the vegetable industry needs list.
- Identify what services need to be targeted into the region.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need such as where their levy money is invested and information other than agronomic.

This visit was to follow up vegetable industry workshops and events held over the last two years that identified industry needs and gaps in information and services and provided growers with options to try and fill these. While these workshops and events have provided good feedback and comments, it is still recognised that more needs to be done to keep the industry up to date and informed of research and development activities and other important information that is available that can assist in improving the performance of their businesses.

Participants included growers, a grower association representative, pack house manager and DPI staff. Growers will receive a list of national vegetable levy research and final reports available at QFVG as follow up, to be distributed through the Local Grower Association. The results from the discussions are in Appendix 1 and a summary of key points is provided below. No names or details are associated with the comments to keep it anonymous. Having a semi-structured interview process provided great opportunity to talk about the issues that the growers and stakeholders feel strongly about. From talking to many people, it was easy to identify any trends without having to ask some questions outright.

Many of the needs and issues on the original list were crossed off due to a number of reasons, and some issues were also added. The reviewed list for the Gympie and Sunshine Coast region is in Appendix 2.

This information will be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers and AusVeg, to include in industry priority lists and used when initiating projects and reviewing and considering funding proposals.

KEY INDUSTRY ISSUES & RECOMMENDATIONS

Communication

- Growers want to know what new technology is available.
- There is a lack of awareness about R&D for this region.
- There is a lack of extension services in this region for vegetables.

There is a clear lack of awareness of Research and Development projects in this region, however, the growers did know where to go for information if they need it. They identified QFVG and the DPI as possible sources of useful information.

In the Sunshine Coast, there was no clear source that the growers regularly use for information. These growers are very independent and have grown accustomed to finding information on their own. It was suggested that having regular R&D information in QFVG magazine would be a useful way to get information to these growers. E-mail and the Internet was clearly not regularly used. Targeted information was favoured over general broad brush information as it is usually not applicable to most who receive it. There is no active grower association in the Sunshine Coast region.

The Gympie region has been receiving assistance by the QFVG Vegetable Program regularly over the last two years, and their knowledge of where to go for information was high. Gympie has a newly established grower association that will provide a key link in a communication network.

No private consultant was identified as a regular source of information for the growers. Only one DPI staff member from Nambour is associated with the vegetable industry.

Recommendations.

- *The Vegetable Program needs to develop and implement a communication strategy that delivers useful information to an established network made up of key industry players. Most of these people are on e-mail and hence dissemination would be quick and resource friendly. It needs to be noted that the strategy must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want, leading to an expectation that there is nothing worth while contained in them and being instantly deleted. Also, e-mails must not be doubled up in hard copy.*
- Include all industry stakeholders and supply chain members in the information loop to assist in information dissemination.

Market Development

- Prove and publicise the advantages of grower groups.
- Explore electronic marketing more.
- Help growers get into export, value adding, packaging and networking.
- Quality management and food safety is needed through the whole chain.
- Product handling education is needed through the whole chain, especially after it leaves the farm gate.
- Recyclable crates – would be great if it was possible.

The trend that emerged from the discussions was the need for growers to work together better for a range of purposes, including continuity of supply and accessing barcodes for supply to supermarkets.

Recommendation

- Ensure the issues are passed on to the appropriate industry bodies and programs.

Pest and Disease Management

- Mosaic virus for pumpkins.
- Alternatives for chemical control.

Recommendations

- Circulate the list to the appropriate organisations and industry bodies.
- Make appropriate additions to the industry priority list.
- Ensure Janine Clark from the QFVG Pest Management Project receives this information.

Consumers

- Advertise the clean and green industry.
- Find out what the consumers want – this would make a difference to what we do and how we pack.

Recommendation

- Ensure this information is added to the appropriate industry priority lists.

INDUSTRY COMMENTS FROM THE GYMPIE AND SUNSHINE COAST REGION

- Getting decent labour can be a problem.
- Don't get rid of the back packers!
- There is curiosity about overseas tours and trips that growers and representatives undertake – who pays for it and what benefit does the industry get?
- The off-label permits that are in the QFVG magazine are good.
- Is there really a need to have the magazine all glossy? A lot of growers feel that it could be a waste of money.
- National Market Place news newspaper is the most useful source of information for my business.
- There is a lot of value in F&V News. Particularly for work place health and safety information and pay related issues.
- The DPI at Maroochy is used for information relating to strawberries, but not really anything else.
- Can some of the R&D money be used to beef up services that the DPI offer?
- It would be good to have targeted information sent to growers, to match the crops they grow. A lot of the general information sent out is just not applicable to most growers.
- Barcodes – punnetts of cherry tomatoes – can a group of growers get together and buy barcodes together? The strawberry association did it. How do we do it? Is it possible?
- Blues Magazine (agriculture magazine) also read.
- There is poor cool transport in this region.
- Is there information available on varieties of cherry tomatoes and their planting times?

- Mosaic virus in pumpkins has been bad this year.
- There needs to be more transparency in industry operations. How can some growers get second hand cartons for cheap prices and others have to buy new ones for up to four times the price. The good guy seems to lose out to stay in line with things like QA.

- Mostly read Good Fruit and Vegetables Magazine.
- Would be good to have an R&D update in F&V News
- Prefer fax than e-mail.
- Internet and e-mail takes up so much time.
- Cooloola F&V Association would be a good avenue to get information out in this region.
- Robin Yule is secretary and Jimmy Lucas is Treasurer.
- Keeping up with change is a big challenge for the growers.
- There are opportunities in the industry for packaging, exporting and networking together better.
- Relationships and doing business and networking poses big challenges. It's hard work.
- Assistance provided by QFVG has been good.

- Value adding and packaging opportunities for the industry.

- Export.
- Varieties – heat and cold tolerance for this area – a lot of the varieties esp. beans are imported from America.
- Future of the industry is working together better.
- E-mail is used here.
- Internet is not used a lot due to time constraints.
- A lot of information is from talking to other growers and businesses.

VEGETABLE INDUSTRY ISSUES 2001 – GYMPIE AND SUNSHINE COAST

Business and Financial Management and Labour

- We need less government pressures.
- We need less social security payments for more people will work.
- Prove and publicise advantages of grower groups.
- Explore electronic marketing more.
- Help growers get into export.
- Help growers network together better.
- Help growers identify and implement value adding and packaging opportunities.

Quality and Marketing

- Quality management and food safety is needed through the whole chain.
- Product handling education is needed through the whole chain, especially after it leaves the farm gate.
- Recyclable crates – would be great if it was possible.

Production

- Alternatives for chemical control.
- New types of vegetables to grow in this region.
- Identify what Asian Vegetables would grow here.
- Breeding programs for varieties that suit Australian conditions.
- Mosaic virus for pumpkins.

Communication

- Growers want to know what new technology is available to assist in decision making for all farm business aspects.
- There is a lack of awareness about R&D for this region.
- There is a lack of extension services in this region for vegetables.
- Establish an effective communication network that reaches this region.

Consumers

- Advertise the clean and green industry.
- Find out what the consumers want – this would make a difference to what we do and how we pack.
- Counteract the greenie statements about chemical use.

NORTHERN TERRITORY

As part of the Vegetable Industry Development Service – Northern Australia project (a national vegetable levy supported project), needs and issues for the industry in the Northern Territory are identified by working with key industry stakeholders in the Northern

Territory Department of Primary Industries and Fisheries and the Northern Territory Horticulture Association, who have close relationships with the growers.

This project carries out activities to:

- Continually review and update the vegetable industry needs list.
- Identify what services need to be targeted into the region.
- Review the modes of information access used by the industry and identify where gaps need to be filled.
- Ensure that growers are accessing information they want and need such as where their levy money is invested and information other than agronomic.

Past activities carried out in the Northern Territory have identified issues and areas where collaboration between projects and organisations can occur to provide growers with more information to improve their farming practices and businesses. While previous work has been beneficial, it is still recognised that more needs to be done to keep the whole industry up to date and informed of research and development activities and other important information that is available that can help to improve the performance of farm businesses.

Information and comments received from the NTDPIF and NTHA are detailed in Appendix 1. Appendix 2 lists the most recent needs and issues for growers in Darwin and Katherine regions.

This information will be passed on to the National Vegetable R&D Committee, Horticulture Australia, Queensland Fruit and Vegetable Growers, Industry Development Officers and AusVeg, to include in industry priority lists and used when initiating projects and reviewing and considering funding proposals.

KEY INDUSTRY ISSUES & RECOMMENDATIONS

Communication

- *It is recognised that if it was not for the services provided to growers through the Communications Officer, the barrier of getting information to the Vietnamese and Cambodian growers would be far greater than it is now.*
- *Growers in the NT do not have a high recall of projects that are funded by the national vegetable levy. This may not be their greatest concern, however they could generally see paying levies as paying bad taxes. Projects that provide real on farm benefit to the growers needs to be publicised as a national vegetable levy supported project.*

Recommendations.

- It would be useful for the Vegetable Program to produce a reference sheet (or the like), in both hard and electronic copy, to point people in the right direction for information and services, with a number of sources listed.
- The Vegetable Program needs to develop and implement a communication strategy that delivers useful information to an established network made up of key industry players. Most of these people are on email and hence dissemination would be quick and resource friendly. It needs to be noted that the strategy must include strict guidelines on the type, style and format of information provided as there is a lot of room to become lazy and send information that the industry does not want, leading to an expectation that there is nothing worth while contained in them and being instantly

deleted. I feel that the best way to ensure growers receive information that is beneficial to them is to feed it through the DPIF and Communications Officer.

Market Development

- Growers working together better for supply and perhaps to establish a packing shed.

Recommendation

- Ensure the QFVG Vegetable Program does not lose momentum on it's commitment to provide services and assistance to help the growers in this area.

Pest and Disease Management

- Fusarium resistant snake bean line.
- Nematode control.
- Virus resistant long melon line.
- Bird control.
- False wireworm control.
- Cucumber moth control.
- Using refuge crops to combat cucumber moth and false wire worm.
- Chemical registrations.

Recommendation

- Add this information to the national vegetable issues list.

Production

- Bitter melon trellis.
- Green manure cropping.
- Irrigation
- Information on lebanese cucumber production.
- Petiole sap analysis.
- MRL testing of produce.
- Information on potential crops for the NT regions.

Recommendation

- Add this information to the national vegetable issues list.

INDUSTRY COMMENTS FROM THE NORTHERN TERRITORY

What do growers know about the National Vegetable levy?

- Very little. That they pay some and that would be all.

Could growers recall any projects that are funded by the national vegetable levy?

- Possibly the board of the growers association could, ordinary growers couldn't.

Where do the growers access their information?

- Neighbours
- Communications Officer (Kim Bui)
- Retailers (very important)
- Agents
- DPIF (some growers)
- Grower group/association
- Access to Asia newsletter.

What information are they looking for?

- Pesticides
- Quarantine
- Fertilisers
- Seed
- Agronomic (general)
- Pest and disease identification

What is their level of computer usage?

Very low – few have computers and even less know how to use them, sometimes their children do.

Are there gaps in information and services that the growers need access to?

Yes. Sometimes difficult to get information that is appropriate for the industry. Language barrier and literacy is a big problem.

VEGETABLE INDUSTRY ISSUES 2001 – NORTHERN TERRITORY

PRODUCTION

- Fusarium resistant snake bean line.
- Nematode control.
- Virus resistant long melon line.
- Bitter melon trellis.
- Green manure cropping.
- Bird control.
- Irrigation.
- Information on lebanese cucumber production.
- Petiole sap analysis.
- False wireworm control.
- Cucumber moth control.
- Using refuge crops to combat cucumber moth and false wire worm.
- MRL testing of produce.
- Information on potential crops for the NT regions.
- Chemical registrations.

QUALITY & MARKETING

- Transport quality
- Identify export opportunities.

BUSINESS, FINANCES & LABOUR

- Grower cooperation and getting them to work together better.

Vegetable Industry Planning workshops 2002

Over the last two months, industry workshops have been held in major growing regions around Queensland. These meetings were held in the Lockyer Valley, Granite Belt, Darling Downs, Childers, Bundaberg, Ayr and Bowen.

At each meeting growers and industry stakeholders were invited, including DPI researchers and consultants, Wesfarmers Landmark and Primac Elders representatives, as well as local Landcare and Farmbis coordinators in some regions.

The aims of the meetings were to:

- 1. Update on the current Vegetable Industry Development Service project, including a summary of work to date*
- 2. Set priorities for the industry at a regional, commodity and industry level, to be incorporated into IDO roles and responsibilities, work to be undertaken at state association levels as well as important national R&D needs and issues.*
- 3. Discuss and plan any future projects as part of the proposed Northern Australia Vegetable IDO project currently in the proposal process*
- 4. Involve growers in taking an active role in their industry either via the IDO, or being more active in priority setting for R&D work.*
- 5. Catch up with growers around the state.*

Workshop method

Growers were invited to give comment on issues that they felt were important to the sustainability and development of the vegetable industry. These comments and issues were similar throughout the various growing regions, regardless of size of business, geographical distance to markets, and variety of commodity grown.

To encourage growers' comments, the priorities that have been determined at a national level were also provided for comment and feedback. This included the six R&D group priorities, as outlined in the National Vegetable Industry Strategic Plan, as well as the 2003-2004 vegetable priorities found on the Horticulture Australia website.

In this way we were able to discuss the relevance of the priorities being put forward by R&D delegates, those that needed highlighting, as well as priorities/ issues that had not been considered. Importantly it also gave the growers a chance to understand the considerations that are being taken on by delegates at a national level.

Workshop results

As previously stated many comments around the various regions struck a similar chord amongst vegetable growers and industry players. The full list of comments from the various regions are attached as an appendix, however below are those issues that have been highlighted as the most noted. General comments have been included underneath to explain the main issues:

Sustainability of industry

- Successional planning for businesses as well as issues such as superannuation
 - Environmental conscience needs to increase, but also be rewarded
-

- Allow new growers into the industry to have the information that they need, so that they have a full understanding, and do not jeopardise the work that we have done in developing to the present standard

Consumer research/ understanding

- Consumers to have better understanding of what it costs to grow
- Issue of country of origin, so that consumers are more aware of buying Australian grown produce and helping to support our rural industries
- Promotion through schools on the importance of vegetables as well as the role that the vegetable industry plays on our communities

Transparency of supply chain

- Market domination of the chains – too much clout
- Growers need to get closer to the market, to the consumers and work at influencing their decisions when buying our vegetables – take ownership of the product

Chemical Registrations

- Need to take more consideration of greenhouse and minor crops – these smaller crops seem to be missing out
- Registrations need to be looked at regionally to make decisions on suitability
- Chemicals are being taken off our markets in Australia, but still being used in New Zealand and other countries

Labour

- Finding skilled labour that is willing to stay. Training itinerant workers is time consuming and repetitive
- Training available to businesses – managers and staff, including funding available and courses on offer

Cost of production

- General costs increasing while prices are not
- Costs of compliance and implementation of accreditation increasing with no financial gain in prices received

National Priorities

Below are the group priorities as well as the national priorities for 2003-2004. Growers generally agreed with these priorities, those shown with an * are the issues that people felt strongly about. The issues **in bold**, are those priorities that growers felt had not been considered, or needed to be a separate issue.

R&D Groups

Brassica <ul style="list-style-type: none"> ▪ Diamond Back Moth ▪ Clubroot ▪ IPM ▪ Trueness to seed * ▪ White Blister <ul style="list-style-type: none"> ▪ Labour costs 	Export <ul style="list-style-type: none"> ▪ Supply chain efficiencies * ▪ Supply chain vertical alliances * ▪ Product development (value added products) ▪ Understanding markets
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<ul style="list-style-type: none"> ▪ Health Benefits 	<ul style="list-style-type: none"> ▪ Freight
Leafy <ul style="list-style-type: none"> ▪ Grower coordination and communication ▪ Control of pests and diseases ▪ Product development – new varieties, understanding consumer needs, value adding ▪ Marketing ▪ Standardised QA and packaging 	Processing <ul style="list-style-type: none"> ▪ Development of fresh cuts and convenience meal solutions ▪ Develop export markets ▪ Import replacement
Root <ul style="list-style-type: none"> ▪ Sustainability land and water resources ▪ Export market opportunities ▪ Post harvest practices ▪ Carrot virus (CVY) 	Other <ul style="list-style-type: none"> ▪ Chemical registration ▪ Pest and disease control ▪ Water management and use ▪ Promotion to increase consumption

2003-2004 National R&D priorities

- Product development
- Consumer research
- Alternative consumer channels
- Post harvest product management
- **Post harvest product handling**
- Water resource management
- Environmental management systems
- Grower groups *
- Labour *
- Communication

Conclusion

These issues and priorities are now being used to plan work within the Vegetable Industry Development Service project. These priorities will also be discussed with the state R&D committee when preparing for future national priority setting meetings.

Discussions amongst staff at QFVG, especially the agri-policy unit, are being organised. This is to determine how several of these issues will be faced and dealt with in the future, so that growers are able to see that their comments during workshops such as these are able to make a difference and indeed develop their vegetable industry.

In this way we are able to encourage vegetable growers to take an active role, and it will determine their responsibility to be involved in future works. It also re-assures them that work at regional, state

and national levels has the potential to benefit their businesses, and highlights the importance of the structures that we have in place.

These workshops have been a huge success. It has been a great chance for the Vegetable IDO to meet growers for the first time, while catching up with familiar faces, and involving people across the industry. The importance of these workshops on a regular basis is great – and ultimately what one of the major roles of the Vegetable IDO is all about.

Grower Workshop Comments

Darling Downs

- On farm vs retail prices
 - QFVG role – market watch – policing and public knowledge
 - People understanding what it costs to grow
 - Prices in chain stores (eg during drought prices increased, even though growers didn't receive an increase in profit)
 - Transparency in chain – lots of grey areas
 - Top price for lower quality
- Imported produce cheaper than Aussie produce but still sold at the same price
 - The imported produce is often older
 - Consumer knowledge/ understanding – support for Australian produce
 - Competition
- Queensland not as well represented at a national level for chemical registration – CPA & AUSVEG
 - Need to target Qld for national registrations to go through
 - At the moment there seems to be a southern focus
 - QFVG needs to identify issues better – Janine
- Water management
 - overhead irrigation vs drip – getting information on changing these processes – WFP
 - big expense if you are not sure what to do and stop before you have the experience
 - WFP Case studies
 - No time for workshops and seminars
- Politicians saying we will bring you water to grow more, but we already have over production most of the year
 - Export is not always an area to follow – transport and time
 - Don't need more production – floods markets, especially salad crops in winter in the Lockyer Valley – Darling Downs doesn't grow at the same time
 - Chain stores demand continuity, standard quality, year round supply

Granite Belt

- Knowing what's available
 - Research results
 - Funding available
 - People and commodity specific information
 - Initiative to trial something – who to talk to
 - Programs, project etc
 - Heliothis
 - Where does it go to
 - Project, information
-

- It has been in the too hard basket for too long
- Chemical withholding periods / permits for smaller profit crops eg Chinese Cabbage
 - Chemicals are being taken off our markets, but still used in NZ and other countries
 - MUP (if larger crops eg Cotton) stop using we lose it as well
 - Losing chemicals that aren't being replaced by anything
 - Differentiation between commodities – can't register for all of them
 - Minor crops missing out
 - Cotton and grain have the volume sales for the chemical companies so they don't worry about horticulture so much
 - Financial incentive for vegetable crops is not there
 - Consistent access to chemicals
- Seed consistency/ quality
- Training issues for staff
- Decent produce should result in decent prices, then wouldn't begrudge paying the higher wages
 - Superannuation for overseas backpackers – why do we pay it? Give workers the options do they want to pay it? ATO ISSUE
 - Skilled labour who are willing to stay
 - Staff who are worth the money we pay
- Cost of production – costs increasing while prices decrease
- Follow up contact with produce
- Market domination of the chains – too much clout
- Not enough promotional work done – on anything
 - Education department – eg Amiens school teaching kids about horticulture
 - People understanding costs involved/ how the system works/ employment
 - School visits – country as well as city kids need to know
 - Promote vegetables in groups – eg winter time promote soups
 - Don't be too specific in promoting – doesn't have to be just one fruit or vegetable
- QA – how has it changed the end product?
 - More cost, more paper work, no financial gain
 - Market still takes lower quality produce if needed
 - If everyone had QA and used it properly you wouldn't mind
 - At the moment there is no implementation
 - Eg of trays – cold store
 - Refrigeration/ cool chain management
- Grower groups
 - Celery growers are a good example of it working
 - Won't work – human nature, different opinions
- 24 hours vs 5 days between sending and returning produce to agents
 - if they don't take the produce they need to have a quicker turn around time
- policing second hand cartons
 - Qld grower's cartons turning up after there haven't been any around – interstate and back
 - QFVG role

Lockyer Valley

- Water
 - Chemical registration
-

- We are focussing too much on soft chemicals and not on hard ones. Some of the pest and disease problems that we are having are as a result of losing these out of our weaponry
 - Big problems mean that you need big/ hard chemicals
 - Softly, softly approach is fine if you have easy problems to overcome
 - Cost of soft chemicals is too great
 - Pressure from market place for year round top quality produce
 - Understanding chemical information – it is becoming more specific and more technical and understanding it all is becoming harder
 - Hard to know where to go or who to talk to for specific issues
 - Silverleaf Whitefly
 - Don't forget about it, it is out there so we need to maintain awareness, increase our understanding and knowledge on the pest (such as is it able to transmit viruses)
 - Need to find cheaper means of control
 - It would help if endosulfan was available, but we can't use it, therefore we are losing means of control
 - Costing commodities – benchmarking for the community/ consumers so that they are aware of the costs of growing their vegetables
 - Costs on farm are always increasing, we are told to become more efficient etc, but we need to make money so that we can manage our land properly, or with an environmental focus
 - It is now impossible to come into the vegetable industry and start from scratch – due to price of land, cost to set up etc. This brings an issue of food security and sustainability
 - Ability to model the industry for people coming into the industry so that people are aware of the viability of the industry – so that those who can grow a good product, can afford to do so
 - Sustainability of the industry and keeping people in the industry who are;
 - Environmentally conscious – “*clean and green*”
 - We don't want people powering people out of the industry
 - We need to get over the cost of production
 - To do this we need to work out what it is costing us to produce. This has to consider everything including;
 - Physical – labour, water, etc
 - Investment – land
 - Social – retirement, superannuation, holidays
 - TRAINING ISSUE
 - Crop Masters modelling
 - Season after season we are getting bad prices for good produce – unless there is an environmental disaster (flood, fire, and drought) somewhere in Australia. This suggests over production and what do we do about it?
 - Difference between price grower receives and price that the produce is then sold for is getting greater
 - Government is socially responsible for environmental issues. We need government legislation to help the problem (water, salinity etc). What will it cost the system to get us (growers) where we want to, and need to be environmentally?
 - The smarter we get at growing, the less we receive as payment
 - We need to get closer to our market, to the consumers and work at influencing their decisions and get the prices that you need for the produce you have grown
 - We need the ability to model the industry for people coming into it
 - Determine the viability
 - The tag of “*price takers not price makers*” has to change
 - Retailers hold all the cards at the moment. We need to know what is going on in that sector – are they ripping us off, is there mark ups, profiteering etc?
 - What is there efficiency if they have to mark up prices so much?
-

- Need to look at other outlets for our produce
 - They have 80% control of produce at the moment, but are this the future?
 - While consumers continue to buy at supermarkets it will be consumer driven
 - Predicting future consumer trends, reacting in the market place
 - Just because we produce, doesn't mean that consumers will buy – they need to be able to afford it
 - Household preparation knowledge is decreasing
 - Greater focus at a supermarket level
 - Recognition at a retail level – get involved, take ownership of your product, be proactive not reactive to the market place
 - We need to make sure that those in the industry are doing the right thing, using the right chemicals have the industry's best interest at heart – we are not all striving for the clean, green image
 - We need to look at variety of produce vs what we can afford to grow, and what consumers can afford to pay. Eg if it is costing us more to grow our shallots than what they are selling for, do we just live without shallots and stop growing them?
 - We have all year round season at a national level due to climatic conditions and production areas (this can work against us). This leads to higher consumer expectation for top quality all year.
 - The seedless watermelon industry is regulated and marketed through one channel
 - Perfection is always putting out new lines of produce and varieties
 - R&D tax concessions – who knows about it? What percentages of growers are taking advantage of it?
 - Labour
 - recruitment
 - attracting staff into the industry
 - skilled staff
 - training specific – competencies of staff
 - idea of a template of what you should know that can be fine-tuned for individual businesses
 - look at competency based, WH&S, legal and legislative requirements
 - Harvest time – most of the crop's money is tied up at this end. We need to have staff at this stage who aren't losing us money, affecting the produce, because they don't know what they are doing, or because they are too slow
 - award should be increase for the work that the staff are doing – we need to pay them a good wage so that we have decent staff who are willing to stay around and do a good job
 - INCENTIVE
 - Price point has to be reflective of production cost
 - Industry is geared around the consumer and what they want, not around the commodity and what it needs
 - Costs are rationalised through the systems – everyone is deflecting the costs back to the growers (retailers, transport etc) Growers are footing the bills, and still not getting that reflected in price.
 - Good fruit and vegetables will sell – people want quality
 - Supermarkets don't want to lose their fruit and vegetables lines because it is their most profitable
 - Would be interesting to track profits over the years looking at supermarket prices for various commodities
 - Different prices are taken from growers for their produce – some are realistic, some are under cost of production.
 - An individual grower can't go in and demand higher prices, because the retailers know that there is another grower standing behind them who are willing/ forced to take less.
 - This sort of activity is not sustainable for the growers or the retailers
 - Monitoring tools – have the ability to factor in the cost of different crops at different times of the year
-

- We need more transparency at retailer end. They need to work on improving their credibility with growers
- Transparency in the supply chain is a big problem
- Training idea could be helping growers to access supply chain players
- Where are the gaps in future strategic planning for the industry – a QFVG role as well as national?

Childers

- Input costs vs output costs
- Lots of money going out of the business, not much coming in
- Eg SQF, QA audits
- Costs of implementation / compliance costs
- NO FINANCIAL REWARD
- Smaller growers struggle with the crops
- Training for supermarkets
- Coles, Woolies staff
- What happens to our produce once it has left our farm?
- Post harvest product handling
- Chemical accreditation
- Get industry auditors to do the work
- If you have a good reputation, then you shouldn't have to pay money each year, maybe one in three, or one in five year check
- Researchers need to do updates on work
- Eg tomato plant breeding research being done in Bundaberg
- Less R and more D was a good summary

Bundaberg

- Wages
 - Income tax – need to fight the pay rises
 - General costs increasing
 - Both small and large growers are affected by any changes
 - NRA – registrations should be looked at regionally to make decisions on suitability. Eg in the Bundaberg region there are no cattle and no aerial spraying so Endosulfan shouldn't be an issue.
 - Transport costs – prices increase and the costs fall to the grower
 - Controlling body on shopkeepers
 - People think that due to the drought prices of vegetables increased, but the grower who was suffering did not receive this. Hard to believe that people want to profiteer off the drought
 - There are mark ups along the way – market, agents, shops, etc so we need a watch dog on the markets
 - Higher prices don't help anyway as they slow down volume flow
 - There was apparently an example a couple of years ago with apples where they monitored the shops and tried to do this type of watchdog effect. There may also be overseas examples
 - Supermarkets buy on kilograms, whereas markets buy on looks and sell of Kgs. There needs to be continuity in buying and selling produce
 - There should be some sort of guidelines to follow
 - Chemical registrations for greenhouse growers. They are all in the same group which makes rotation hard
 - Information available on IPM in greenhouses
 - Chemical registrations for minor crop growers
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- What is the definition of a minor crop these days?
- Industries such as greenhouses, hydroponics, snow peas etc are no longer small crops when you look at the money they bring into the industry, people they employ, etc.
- Better marking in supermarkets so that consumers can identify country of origin. In this way the consumer then has the choice between buying Australian grown or not.

Ayr

- Labour – locals and backpackers not enough. Training itinerant workforce is time consuming and repetitive, with frequent loss of staff. {similar programs with “work for the dole” needed}
 - Increasing pay levels for workers to give incentives to work harder based on experience.
 - Better prices for commodity would enable growers to hire a better workforce.
 - Growers working together would increase their voice politically on issues such as labour – grower group with a “price maker” not “price taker” attitude.
 - Transport union in with the growers would also increase political voice.
 - Supermarkets are an uneconomical way to market vegetables. They have the power and so don’t have to worry about their inefficiency.
 - Individuals don’t work as a group, which limits growers’ ability to get a decent price for their produce.
 - QA doesn’t guarantee a grower a better price!
 - Capsicums seem to be the only major crop group grown in this area that are getting R&D projects funded
 - Why can’t levies taken from a specific district be allocated back to that region? Certain percentage (10%?) could go towards national issues but the rest should come back into the district of origin.
 - Post harvest management of product is important to highlight to supermarket chains but should not be an issue for R&D \$ to be spent on.
 - Supermarket expectations make greater demands on growers eg packaging and presentation, but there is no extra value to growers.
 - Market research – what the consumer is thinking and how they are going to perform what they are going to purchase. Knowledge on consumer numbers at local markets vs supermarkets needed.
 - Freight costs limit sending to southern markets, so local markets are a viable alternative.
 - There are no Nth Qld reps for commodities any more, thus there are few R&D projects being funded – most of it seems to go to researchers in southern states.
 - Water prices for licences at \$50 each. Charged to put down bores on their own properties.
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Technology Transfer

Looking Beyond the Farm Gate

Ray Russell

The South Burnett Small Crop Growers' Alliance was formed from horticultural growers within the five shires of the South Burnett Region. Cameron Bisley, the region's Economic Development Officer has been instrumental in helping the group identify opportunities for improved performance of the South Burnett's vegetable industry. After a few meetings of the group, it was put forward that the feasibility of a centrally located packing facility should be investigated. Through the HAL (Horticulture Australia Limited) funded VIDS (Vegetable Industry Development Service) project, implemented by QFVG, the group members were guided through the process of situation analysis and identification of the necessary infrastructure required to support the needs of a growing regional vegetable industry.

Awareness of the marketing and supply chain is essential to enable growers to identify appropriate business opportunities.

Cameron was put in contact with QFVG after preliminary discussions with QRAA (Queensland Rural Adjustment Authority) and a private consultancy firm. Shane Comiskey, in his role as the VIDS Industry Development Officer (Marketing and Business Development) visited the group. Initially there were 45 growers included in the group. The main findings from the first meeting with the growers were:

- All were small growers with cucurbits being the major crop;
 - The growers had a fairly low level of knowledge of the horticultural industry as most were previously involved in other industries (eg. beef);
 - There was no history of a working relationship among the growers;
 - Grower commitment to the establishment of a packing facility was questionable;
 - Growers had a minimal understanding of the vegetable supply chain and most growers were vulnerable to unfavourable negotiations with produce wholesalers;
 - As there are very few horticultural consultants in the immediate area, there was a need to identify people to provide assistance to the growers.
 - There was a need to create links with other horticulturalists in other regions.
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From this meeting it was decided that before considering developing a packhouse, the group required an educational program with elements of supply chain and marketing. Shane assisted the group to submit a proposal to QRAA for funding to conduct an educational tour of other horticultural regions and markets with the purpose of raising awareness of group members in elements of the marketing and supply chains and to enable growers to identify appropriate business opportunities.

“The trip was great. It exposed us to opportunities for our product based upon marketing.”

14 group members participated in the three tours that were partially funded by the growers themselves. Tom Perkins was one of the growers on the tour. Tom originally was a dryland farmer producing peanuts, navy beans and grain on a 270 hectare farm. With the seasonal changes experienced in the early 80s, Tom tried his hand at growing zucchinis. Although he could only irrigate until the water lasted, in 1986 he grew ½ acre of zucchinis and found he received a higher return for that crop than from the broad acre crops. In 1994 he moved to an 11 acre irrigated farm of which 9 acres are under production, with the main crop still being zucchnis. Tom regards small crop farming as: “...more constant work for nine months of the year, but the price (and therefore income) is more reliable.”

Before the tour program Tom “...did not look past the agent. I have a brother in Gympie growing zucchinis. So I just produced a product that I knew I could produce and only relied on one major agent and one carrier. The trip was great. It exposed us to opportunities for our product based upon marketing. We knew of other markets, but did not have an idea on how to access them. We hadn’t seen anything like the packhouses in Gympie and Bundaberg. Both places employ a full time marketing officer who receive orders, contact the markets around Australia, and obtain the best price. A couple of the growers have started sending their produce to the packhouses because they can look after the packing and marketing and we can concentrate on the growing.”

“We are now more aware of how to access QFVG’s services”

The other trips included the Brisbane Markets, QFVG, discussions with wholesalers and vegetable managers for major retailers, exporters, Brisbane Port facilities, grower groups, QFVG, DPI Call Centre and library, Kalbar carrot farm and

processing plant and other farms in the Fassifern and Lockyer Valleys. Tom reflects: "The market trip allowed us to see our own produce on display, as well as how others are also presented. The visits to the retailers made us think of the consumers' point of view. We had contact with professional type of operations and got to understand what supporting infrastructure was required. We are now more aware of how to access QFVG's services, however it is a two way street...we need to make ourselves heard."

"I think the main role for QFVG is to provide growers with information"

Darryl and Elaine Porter also participated in the program. They came to the South Burnett from Wandoan where they had a grazing and grain property in shares with Darryl's parents. After experiencing extended periods of drought, they sold the property in 1996 and moved to the South Burnett, which in Darryl's view "was the best find from Biloela down for quality and volume". The small crops grown on their 200 acre property are zucchini, squash, pumpkins and watermelons, cereal crops and some lucerne.

"Initially we wanted to developing the packing facility to gain more buying power for boxes and seed etc., more like a co-op. To give us more marketing power. The problem was that even with all growers in the area involved, we were still not big enough. The education program made us get outside the front gate. We looked at where to market, different ways to market and the direction of the market. We are now having a trial run with the Gympie Pack House with our zucchinis. It is working out to be more profitable in that rather than spending time packing, we can produce more, treble our output."

Both Tom and Darryl see Shane's advisory role as pivotal in the group gaining a better understanding of the market and opportunities for their individual businesses as well as the region as a whole. Tom: "Shane came and grabbed the ideas of the group by the scruff of the neck, he took responsibility and actually achieved something. We now know that we can contact QFVG for information, that we can call on Sam Heritage and others to come up here and this has just opened it up for us. We are a small group, but we will expand." Darryl adds: "The main benefit of the program was looking beyond the farm gate. Shane was our link to the outside world. Next Monday we have Janine Clark from QFVG coming to talk to the group

about crop protection issues. I think the main role of QFVG is to provide growers with information.”

A regional cool chain facility

One of the findings from the program was the need for a regional cool chain facility, as produce transport does not service the area on a daily basis. Many growers have small cold rooms on their properties, but are restricted in their opportunities to increase production due to the limited cold storage capacity. Cameron Bisley is currently working with BGA (Bean Growers Australia) to get the facility established. John Stanton, BGA's Assistant General Manager, acknowledged the region's potential for small crop production and expects the cold storage to be functional during 2002.

Main benefits for the growers from this project:

- Linkages with producers from other regions and supply chain participants;
 - Awareness of the elements of the supply chain;
 - Knowledge of where to access information;
 - Business opportunities;
 - Awareness of group formation and maintenance and the benefits of producer groups;
 - Understanding that small enterprises can be financially successful.
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How the talk over a few beers developed into a multimillion dollar grower group business

Ray Russell

Changing consumer buyer preferences towards the large supermarkets for fresh produce purchases has resulted in some growers changing their marketing strategy for direct access to supermarket buyers. The requirement for specific QA systems in packaging produce and producing the volume needed for the desired long line of a consistently graded product, makes the entrance into this market segment prohibitive for the smaller individual growers.

A small group of growers in Ballandean, south of Stanthorpe who met regularly at the local club had been talking about forming a marketing and packing group for around three years. In 1999 the talk became more serious and in June of that year six growers got together to plan building a central packing house. Together they saw the opportunity for economies of scale in operating costs and increased marketability of their products through implementing a uniform QA system and marketing under a single brand.

Of the six growers, five were second or third generation farmers from the area who knew one another well. One of the five, Ron and Meryl Anderson had recent experience in collectively marketing tomatoes with other growers under a single brand. The others involved in the group are: Peter Slater, Des Day, Graham Williamson and Peter Day and their families. The sixth grower, Davydd Westlake, was new to the area, having bought a farm only a few years previously. In September a few of the group were present at a vegetable growers' meeting in Stanthorpe and heard Shane Comiskey's presentation about farmer marketing groups. They approached Shane to discuss their plans and how the HAL (Horticulture Australia Limited) funded VIDS (Vegetable Industry Development Service) project, implemented by QFVG may be able to offer support for their project.

Understanding the implications of moving from working as an individual to working together as a business enterprise.

At the first meeting Shane went through a situation analysis with the group and identified areas where the VIDS program could assist them. Shane reflects “From the initial meeting I saw my role as assisting the KCP (the acronym for the company name, Kool Country Packers) group to understand the financial and psychological implications of moving from acting as individuals to working together in a significant business enterprise. At that stage the group had identified that they wished to work together, had identified a potential block of land to establish the facility, had agreed on certain items of machinery that would be pooled by the group.

The group sought assistance in the areas of:

- group establishment and maintenance;
- completion of a business plan and financial budgeting;
- organisational structuring;
- project planning (what steps and when);
- negotiation strategy with service providers;
- linkages to individuals or organisations to assist with the implementation of the project plan.

The critical initial step was to identify how committed the group was to the concept, what each individual's strengths and weaknesses were and how it would effect to the overall organisation. We also saw the need to look at how other successful ventures were operating. I organised a two day tour of four group packing and marketing operations from the Sunshine Coast to Bundaberg.”

Our business would only work with total commitment from all the growers involved.

Ron Anderson picks up the story “Shane organised a bus tour of four group packing operations to talk to the people involved and see their operations at work. During this trip we rewrote our business plan, discussed envisaged problems and things we had learned at the operations along the way. At each operation we visited, the message was much the same: Our business would only work with total commitment from all the growers involved, and free and open discussion and information sharing”.

The tour helped to affirm the group's commitment to the business, the land was purchased and plans for the packing facility were finalised. A number of planning stages occurred concurrently over the three months from September to December 1999. In brief the steps included:

- Advice on corporate structuring was provided by Shane and others; including the company's accountant.
- Identification of the financial institution and finalisation of the business plan.
- Finalisation of plans for the packing facility in negotiation with engineering and construction contractors.
- Negotiation with transport services. Lindsay Bros transport agreed to construct the cold rooms on a medium term no-interest repayment scheme.
- Negotiation with packing material suppliers. A medium term contract negotiated at a fixed price for the supply of cartons and design of a single branded carton.
- Assistance with an application to QRAA to develop a QA system with a QA consultant. The facility is Freshcare accredited and has a fully documented SQF 2000 QMS (Quality Management System) in place with all growers having Approved Supplier status.
- Group discussions regarding future marketing strategies and identification of supply chain partners.

We don't have all the answers and as such we are quite prepared to seek assistance.

During the three months of seemingly frenzied activity, Shane also provided what he terms a 'trouble-shooting' service, whereby each member of the group was able to contact him to discuss any area of concern. From discussions with the group it is apparent that it a critical element in the development of the business was to have an external advisor. Ron again "The support received from external organisations was critical to the establishment of this enterprise. We don't have all the answers and as such we are quite prepared to seek assistance from professionals in their area".

A turnover of \$2.6million was achieved in the first season.

KCP commenced operations in December 1999 packing under the KCP brand. The Minister for Primary Industries officially opened the facility in February 2000. A turnover of \$2.6million was achieved in their first season of operation.

The system KCP uses is to pool all fruit and vegetables. Currently KCP packs for the six shareholders and four other growers. Grower packouts are separated according to the specifications and growers are paid the average price received for the product over the week. Every pack has a grower number for identification purposes. All product is marketed under a single brand in straight pallets, although different growers may be on the same pallet.

The advantages of marketing under a single brand are well documented. However the main deterrent to growers is the loss of individuality and control over their product. To limit this, KCP has a communication strategy in place where the growers meet weekly and written advice is sent to all growers, keeping them informed of market prices and feedback from customers regarding quality and market demands.

2002 and beyond

KCP employs a manager for seven months of the year and 10 semi-permanent staff. The group also contracts the services of a field officer to provide agronomic advice towards the production of standardised fruit.

Already the facility is being upgraded with a new stonefruit grader to be in place for this season's crop and a separate office to be built. The firm hopes to increase the number of growers supplying product. KCP has a ten-year plan and sees opportunities in the export market and increase direct access to the retail market (currently 10% of their product) and developing alliances with other production regions to fill the five-month operation void.

Shane advises that there are many operational models for group businesses. The needs of each group require assessment and a model designed to suit the particular situation. The VIDS program has developed an understanding of many of the models that are currently employed by producer groups through its previously conducted audit of producer groups.

Critical elements to success:

- Know the market and identify opportunities
 - Have a vision
 - Commitment to the project from all involved
 - Develop a business plan
 - An independent site
 - Know the local regulations
 - Know the timelines
 - Have 'drivers' within the group
 - Obtain assistance and advice
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Restructuring for Success

Ray Russell

The Gympie Pack House (GPH) is Australia's largest group packer and marketer of hand picked beans. In addition to beans, GPH also pack and market zucchinis, capsicums, tomatoes, eggfruit, peas and squash. GPH began operations in 1993 as a partnership among 8 grower enterprises. For legal and venture capital reasons, the partnership was dissolved in 1996 and the business restructured as a Pty Ltd company. With a turnover of around \$5.0M per annum, a successful branding strategy and increasing supply and buyer relationships, the success of GPH is well known in the industry. However, it always hasn't been an easy road to success for the company.

Seeking assistance to review business operations

In late 1999, GPH was at a point where the business was experiencing various operational problems and no easy or quick solution was evident. The shareholders felt that they were missing out on opportunities due to operational and marketing difficulties. A few of the GPH growers attended the first round of the 'Changing Face of Horticulture' presentations offered under the HAL (Horticulture Australia Limited) funded, QFVG implemented VIDS (Vegetable Industry Development Service) project. After the presentation, two members of GPH approached Shane Comiskey for assistance in reviewing the business. With help from Shane in his role under the VIDS project, a submission for funding from QRAA (Queensland Rural Adjustment Authority) was developed to improve the internal and business relationships of this producer-owned business.

In conjunction with QFVG, Pinnacle Management conducted a series of interviews with the shareholders to gain an understanding of the business operations, shareholder concerns and identify actions required to ensure the company's long term, harmonious operation and economic viability. The interviewees raised approximately 50 issues. The resulting report highlighted the points raised in the areas of business performance; marketing; staffing; reporting and communications; suppliers; executive and management committee; the role of shareholders; and the future. The report was presented to the shareholders at the GPH annual general meeting. According to Shane, one shareholder commented: "This was the first meeting in which all shareholders attended and no-one got up and left".

The use of an external facilitator was integral to the success of the project.

Integral to the success of the project was the work of Pinnacle Management as the external facilitator as in addition to providing professional guidance, it also provided an 'outsider's' view and shareholders felt more confident to express their opinions. Grower, Jim Lucas supports this: "Through the funding we were able to get outside expertise. You've got to remember that we are farmers and that's what we're best at." The project ran for 18 months. An action plan was developed in consultation with all shareholders and implemented over the period. Main points from the action plan included:

- An improved communication linkage between shareholders and staff via weekly meetings;
- Improved communications between shareholders and suppliers;
- Development of a yearly planting schedule;
- Implement a Field Quality Assurance System;
- Gain a better understanding of retailer and consumer requirements for product;
- Improve product differentiation and presentation;
- Identification of new customer groups;
- Redesign business/operational reporting systems;
- Improve feedback to growers regarding prices, trends etc.
- Employ a Grower Sales Liaison Manager;
- Redesign Company reporting structure;
- Develop and implement a code of conduct for shareholders;
- Revise position description for all staff;

GPH Managing Director, Peter Buchanan experienced first hand the need of a dedicated marketing and liaison manager when he fulfilled the duties of the position for six months. Alan Cross joined GPH in March 2000 as the Grower Sales Liaison Manager. Alan came with 35 years experience in the horticultural industry and for 14 years was a grower representative for the QFVG Other Fruits Group Committee and Chairperson for the Paw Paw Sub-committee. Alan's main duties in his position with GPH involve liaising with customers and growers; product development; and market research. Working with Abbings Consultancy,

GPH has developed an Approved Suppliers Manual. Alan views an important element of his role is: “providing the information flow back to growers, helping them get better and smarter, looking after our existing markets and exploring opportunities for new markets for our products”.

“You’ve got to encourage growers wherever they are to work together, individual success went out a decade ago”.

When discussing QFVG’s role in the project Alan reflected about his previous experience with the grower organisation: “...no-one got out to growers at the grass roots level. They purely relied on feedback from the grower representatives. With Shane we benefited from the face-to-face relationship. Alan’s opinion is supported by Jim Lucas, “Shane provided the linkages and information to get the expertise we needed.” Peter Buchanan adds “We would not be where we are now without the support in working with the group to obtain the funding. You need a body like QFVG to pick out suitable consultants. We have very positive signs over the 12 months. ...We are now involved in pre-packing research for the hand-picked beans and Shane has helped us develop that project, together with Paul O’Hare from the DPI. ...You’ve got to encourage growers, wherever they are to work together, individual success went out a decade ago. The fruit and vegetable industry is a very global network, we need to work together, not against each other”.

“I would question, if we did not have the Packhouse, whether we would still be involved in horticulture”.

Advice on the benefits of forming alliances is provided by Jim Lucas: “I consider, in future, the formation of alliances will be essential to firstly, meet the needs of the market for longer lines of consistently graded product, but also increasingly the cost of setting up a quality and food safety system as required by the marketplace will make it harder and cost prohibitive for individual businesses to survive in the long term. ...As individuals, we could never have hoped to achieve the level of sales that we do as a group. Our buying power particularly in packaging and the ability to negotiate freight rates are also added benefits. ...I would question, if we did not have the Packhouse, whether we would still be involved in horticulture. In fact, we are very optimistic about our future. For those producers considering forming a group in future, I give you these thoughts:

- Make sure you have others who share your vision;
- Be aware of the mistakes that other groups have made in the past;
- Be honest at all times and keep all within the group informed of what is happening – open communication is essential;
- Seek the assistance of others – don't be trailblazers, others have trodden the path before;
- Don't be afraid to access outside advice. We always need to remember we are specialists in production and that we don't always have the answers."

To survive in the Vegetable Industry is not necessarily achieved through expansion, but by getting smarter with the resources you have.

Ray Russell

Those of you who know Paul Ziebarth, will acknowledge that once you get him going, the ideas, opinions and enthusiasm just keep coming. These articles were meant to be brief. But what Paul and his family are working on is an innovative approach to 'systems' farming. The road the family took to developing the idea is interesting and cannot be covered in one page. I'm only glad that I did take along that extra tape...

Paul Ziebarth is a fifth generation farmer in the Lockyer Valley. His great-grandfather and grandfather were the largest lucerne and chaff growers in the Lockyer. The family moved into vegetable growing in 1965, first with potatoes and onions then moving into processing vegetables. With the decline of the vegetable processing industry in the Lockyer Valley during the late 80s - early 90s, the Ziebarth family had to ask themselves – Where to from here?

Get Big or Get Out – a flawed philosophy.

Paul had heard it all before in the debate about the viable farm size – “Get big or get out”. “I think that's a very flawed philosophy. I think there is a future for all sorts of farms – big ones, little ones, medium ones. There is a future for the very big mechanised single commodity farms that do big volumes, have a low cost structure and an undifferentiated commodity. There is a very good future for the small specialist farms that have a lot of manoeuvrability and flexibility, don't have the economies of scale but can do a whole lot of things that the big farms can't. The ones that I think are probably in trouble are the ones that are in the middle, that are too big to be small and too small to be big. They don't have the benefits of being one or the other. They need to make a really clear decision about what they want to do and if they take the 'get big' strategy, they'll have to be bloody careful.”

The Ziebarth's 32ha farm fits into this medium to small farm category. The family came to the decision that they didn't want to become a large single commodity producer. “We felt there were more opportunities for our geographical position, our

resource base and our skills base to manage what we have – but to do it better. Rather than looking outwards for a solution to their problem – the Ziebarths began to look inwards. After roughly eight years of round-table family discussions, discussions of ideas with researchers and “mucking around with our fish tank at home”, the family have come up an innovative approach to ‘systems’ farming.

Being in the Lockyer Valley gives the farm a competitive advantage over southern producers by being able to grow winter vegetables from March to September. “Broccoli finishes in September, zucchinis, then cucumber, tomatoes after Christmas, beans, then back to broccoli. By changing the product mix, you can produce 12 months of the year. We also work on the strategy of selling everything we harvest. You can’t just sell 40 to 50% of the crop that meets the specifications and give the rest to the pigs”. The tomatoes for example are sold to three market segments – the retailers who want a specific size, caterers who want the larger product and the smaller tomatoes are used for dehydrating.

“Profitability is not about how much you make, but about how much you save getting there”.

Paul estimates that in every ten years the production costs have doubled, but the price for the produce remains within a floor and ceiling which doesn’t change. “The ceiling for tomatoes is \$3 per kilo and that is the same in 2001 as it was in 1975. So if our costs go up we can’t just say we’ll charge a little more, because it just isn’t going to happen. So what we have to focus on is as costs go up we have to become more efficient about a whole lot of things and profitability is not about how much you make, but about how much you save getting there”.

Paul maintains that there are two important elements to saving. “One is about increasing productivity so the more you put in, you lower the fixed costs. The other is being really clear about the whole farm system, what creates wealth or value, what is actually just an input versus what is a wealth generating activity. We made a very clear decision that what generates wealth on a farm is productivity and quality, and where that happens is out in the paddock. The packing shed is just something you need to sort out the crop and chuck it into a box, not something that adds value and adds wealth. We need to have access to one, but we don’t have to own them”. Apart from packing their own tomatoes and cucumbers, all packing is

contracted out on a fee for service basis that Paul maintains is cheaper than they could do themselves. “The only reason we still pack some produce is that we can’t find anyone else to do it for us”.

We have no control over 85% of our costs

For the past few years the farm has been running an internal costing system. It involves their key workers keeping daily diaries. “It’s pretty laborious, but by doing it we can understand very very well where the costs are for everything on the farm. What it costs - what is the labour and capital component, so we can see \$x/ha or \$x/t. Now with benchmarking they all say we must be more efficient, but the reality is that we have no control over 85% of our costs. We have no control over wages – 48% of the cost of production for tomatoes, 13.3% on cartons and 14% on freight. This is all non-controllable, we can negotiate a little but not much. The production side we can control, and this is where we made the decision about efficiency is not about getting bigger, better, faster, more equipment, more capital, you can actually do without all that stuff. The only way we can increase productivity but decrease capital requirement and do things cheaper is to have good numbers to work with. And you have to keep going through the numbers and say what is our biggest cost – fertilizer, okay let’s see what we can do, then go on to the next one, when finished you go back to the start. It is not rocket science, just cost management. 25 to 30% of costs you can control and we’ve only been nibbling at it. We have this debate about water. Currently it is \$18/ML and people are saying that we can’t afford for it to increase to \$36/ML. Now water costs for tomatoes is only 0.5% of the costs of production. So I don’t care. Do something about wages or freight and I do care”.

It surprised us beyond belief with what we could do with permanent beds.

The farm began using permanent beds in the early 90s and very soon the whole farm will be converted to this system. Paul describes the system: “50 percent of tractor power is actually used to compact the soil and tear it up again. But if you use controlled traffic where you drive on the same patches all the time, they get very hard like a road base and if you don’t tear them out again it is easy to drive on. Also by not driving on the seedbed, it remains nice and loose and does not take much power to drag things through it. So instead of doing one two metre bed at a time, with the same horsepower you can do three. You then start looking at

timeliness and productivity of work, a job that used to take half a day now takes one-third the time”.

The use of permanent beds has led to increased production by getting more crops in, decreasing the amount of work and capital input through less operations and use of smaller machinery. . “We did a patch of broccoli with only three operations, normally it would require eight or nine. We are in transition mode now and have a three- tiered plan. We have the potential to go from one crop and seed in the ground with two operations.”

GPS - Accuracy, speed and timeliness

To enhance the use of the permanent bed system, the farm will use GPS (Global Positioning System) to guide the machinery, a system that is used primarily for cotton and broad acre farming. “I’ve talked to all the GPS people in the country and we’ll probably be the first horticultural people to do this. We will have a base station in the house able to reach 10km up and down the valley and we will know exactly where the machine is within 1mm. There is a receiver and a computer in the tractor which gets signals from the satellite and the receiver talks to the base station. If you’re driving at 15km/hr the tractor can be guided to within 2cm accuracy, which is incredible, people can’t do that. With GPS we can also operate at night.”

“We are not really farmers of the soil, we are actually farmers of water”.

The move from furrow to trickle irrigation has been a big leap for the farm’s water efficiency. “There is a limit to how more efficient you can get after you’ve moved into trickle. We’re almost there with cropping efficiency, we’re almost there with water efficiency, so what else can we do to get more productivity? We started fishing around with our fish tank at home where we set up a self-sustaining biological system with clams and fish and crustaceans on the basis of the system being the waste of one becomes the input of other. The fish poo became the food for the crayfish and the clams filtered the water through and took the nitrogen out. It worked really well until as the kids called it – ‘the night of the crayfish’. Somehow the system got all out of whack and they started attacking the gold fish. They didn’t kill any of them, but they chewed all the tails and chopped fins off. We are not sure what did it, but we think they outgrew the ability of what the fish could provide in

the way of a food source. That was the end of the crayfish – they got kicked out. Despite this we started to think along the lines of a farming system where the waste of one operation becomes the input for another.”

That was a big turning point for the Ziebarths’ systems thinking. “We thought okay, if we want to increase the productivity of the water we have to increase the use of it. Instead of taking the water out of the aquifer and growing a cabbage, we can take the water out and do something with it first. We could set up a Turkish bathhouse for example and charge tourists to wade around in it first before putting it onto the cabbages.” But instead of that idea they turned to thinking of aquaculture. “The fish don’t drink water, they only use it and the waste is high in nitrogen and phosphorous, contaminants that drive fish farmers crazy because it is difficult to manage, but are important inputs for the farm. So we did a whole lot of research which culminated about two years ago. We were thinking aren’t we clever to have thought of this all by ourselves, then discovered that Israeli farmers have been doing this forever. However that validated the idea that our little farm here with the water we have, which will only be 120ML – 4ML per hectare per year, could grow fish. We are currently in the situation where we are going to be given water allocations from the government and it is probably going to be half of what we currently use. With 120ML we can produce roughly 120t to 130t of fish.” The farm enlisted the help of experts and is soon to have a pilot dam in place. “It’ll make a bit of a difference to the fertilizer bill, but the main thing is the fish production. If we’ve got 4ML of water we could take the water and grow 1ha of soybeans for 4t at \$250/t, may get \$1000 revenue. But with the same 4ML of water we could grow 4t of fish *and* the soybeans.

Now we only have to redefine aquaculture

Aquaculture usually involves large volumes of water and few fish. “We are going completely the other way because that system requires very high levels of management and input, we also can’t afford to put 10ha under a dam for fish. The dam is to cover a quarter of a hectare. Now people who know about aquaculture will say ‘this is (crazy), this can’t possibly work’. But it will, I know it will”.

How to achieve the goals

It was then just a question of funding. Paul approached Shane Comiskey, the Vegetable Industry Development Officer with QFVG's VIDS project to seek his assistance with identifying appropriate funding sources for his project. The assistance Shane provided in consultation with Paul and other interested parties included:

- The development of a draft business plan;
- The development of an action plan of activities;
- The completion of three business applications to the EPA (Environmental Protection Agency), DSD (Department of State Development) and AFFA's Farm Innovation Program;
- Facilitation of discussions with the funding agencies.

Funding for the project was received from all three agencies. A major factor contributing to gaining funding was that the project is viewed as being applicable across the horticultural and agricultural sectors and is appropriate for, and replicable by industry participants. The design of the aquaculture ponds is currently at the final design stage and Paul plans to run a series of field days throughout the project to discuss the system and project progress with growers and other interested parties. A dedicated project web site is also currently being developed to facilitate the dissemination of the findings from the project.

The Ziebarth family is certainly progressive and proactive in putting into practise their ideas. Paul shares with us his view of the farming life: "The golden rule is the world owes you nothing, you have to accept that you have to do more for less because that's the way it is. You have to accept that bad things happen to good people for no reason, that life's a bitch and then you die. You can't get hung up on the past. We have put a whole lot of different thinking into one package. One man being able to do all the husbandry for a 100 acre farm – planting, fertilising, irrigation, spraying. It takes three at the moment to do all that. We aim to double the productivity and cut the workload by two-thirds."

Strategies for success:

- Be clear about what you can do and what you can't do
 - Sell everything you harvest
 - Be clear about the wealth generating resources
-

- Know the costs involved with the production system
- Be open to ideas
- Seek assistance from programs designed for business development

Developing Best Practice Standards – a participatory approach

Ray Russell and Paul O'Hare

In the previous article it was noted that the Gympie Pack House (GPH) is Australia's largest group packer and marketer of hand picked beans. During the process of redefining the business operations of GPH, future directions for the company were identified. The marketability of handpicked beans and increased marketing opportunities, was seen to be dependent on the product gaining consumer recognition as a consistently high quality product. To investigate and establish best practice handling guidelines for handpicked beans, a project was developed by the growers with the support from Shane Comiskey from the HAL (Horticulture Australia Limited) funded VIDS (Vegetable Industry Development Service) project, implemented by QFVG and Paul O'Hare from the DPI's Agency for Food and Fibre Sciences. The project received partial funding from HAL.

Consistency of product quality is essential for market development

The value of green bean production in Queensland is approximately \$50m per annum. Handpicked beans represent only 20 to 30% of production but supply an important high quality niche part of the market.

Handpicked beans have traditionally been perceived in the market place as being of superior quality to machine picked beans and thus warranting a price advantage. This price advantage is necessary to cover the higher costs involved in handpicking beans. Handling systems involved with the production and marketing of machine-harvested beans have improved in recent years. This has resulted in a narrowing of the quality differentiation between the two products.

Consistent bean quality is important to the entire demand chain. Wholesalers, retailers and exporters as well as growers require the adoption of best practice handling systems. Handling systems of handpicked beans from harvesting through to marketing vary widely throughout the industry. This can result in a wide variation in the quality of the product at the time of packing and its potential shelf life. Consistency in quality is important if the demand for fresh picked beans is to be maintained or expanded. A potential move towards specialty bean prepacks will particularly require a consistent, high quality product with an assured shelf life.

Concerns have also been raised by growers of handpicked beans about losses during handling between harvesting and packing. Preliminary figures put these in the range from 10 to 15%. It is necessary to analyse where these losses are occurring and to put measures in place to reduce these losses in future. It is also important to conduct this analysis under a range of climatic conditions in order to compare differences in losses.

Identifying the Variables

The members of GPH recognised the need to develop best practice handling guidelines and together with Shane Comiskey from QFVG, examined current practices to identify the variables that define the quality of the product. Paul O'Hare from the DPI's Agency for Food and Fibre Sciences was approached to work with the group to research and develop best practice handling guidelines. Paul came with extensive knowledge and experience of handling systems within the Australian handpicked bean industry. Paul has enjoyed previous success from working with grower groups. He had been instrumental in the development of GPH in 1993, working with the group to identify the potential for group packing and marketing of handpicked beans.

Shane and Paul worked together with GPH members to develop a project proposal to investigate the best practice handling systems for hand picked beans from production, harvesting, transportation and packaging, to optimise quality, increase shelf life and reduce losses. The project was aimed at maximising the involvement and benefit for the growers and GPH staff. A planning committee of key growers and staff was formed which was responsible for planning, directing, organising and reviewing the research and identifying how the results could be adapted into their systems as part of this cyclical process throughout the project. HAL was approached to fund the project. They agreed to provide dollar for dollar support as they could see the applicability of the project to the entire fresh vegetable industry. GPH contributed the other 50 per cent of the funding required for the 18-month project.

Grower involvement in the research process is critical for success

Paul sees the success of the project stems from it being grower-driven. The growers worked through the issues with Shane and Paul to identify the research

needs and the project objectives. Grower commitment to the project is not only evidenced by their funding contribution, but also by the full participatory nature of the project itself. Paul has used the same participatory approach in his role as extension team leader in the development of the Mac Man farm recording system for the Australian macadamia industry. Wherein a planning committee of key growers, consultants and processors from each major growing region was involved in the development of the system to meet the needs of on-farm quality management and the identification and adoption of industry best practices.

The participatory approach is well documented in extension publications. Basically it is a cyclical process incorporating planning, action, reflection and generalising. By working together, the researcher and participants can adapt or change the project as it goes along to suit their needs. Successes of projects using the participatory process are reflected in the changes participants make in their current operations or systems of production. They are more likely to see the benefits of changing their current mode of operation if they can experience for themselves the benefits of the changes. Paul uses a simple philosophy to participatory research: "Some researchers are not comfortable with working within a participatory framework. You have to be flexible and fit in with the participants management system and more adaptable as you don't have full control. You definitely can't have an 'I'm the expert' attitude. You need to work with the growers and acknowledge that they have an incredible amount of experience and knowledge". Commenting on QFVG's involvement, Paul says: "Shane played a very important role in guiding GPH towards the identifying the needs, having the time for the growers and developing the project proposal".

Trials were conducted to reflect the diversity of production and handling conditions

The planning committee decided to analyse and investigate handling systems from harvesting onwards through washing, sorting, packing cooling, storage and transport. It was decided to conduct a series of trials on four properties representing the diversity of handling systems within the industry. For example, two farms were selected with on-farm cooling systems and two without. The trials were conducted with round podded, flat podded and butter beans to represent the diversity of bean production within the industry.

The trials were also conducted over summer, winter and spring. This not only allowed the growers to see the effects of the practices under different climatic conditions, it also enabled them to go through a series of cycles of continuous improvement. They were able to make adaptations and improvements to their own and the GPH handling systems after seeing the results of each cycle of planning, conducting and reviewing the trials.

The trials followed the handling systems from harvesting on the farm through the delivery, packing, handling and storage systems at the Packhouse. Losses were identified at each step in the process and potential solutions investigated. As areas of concern became evident in the handling systems as the trial progressed, such as the effect of low cold room relative humidity on drying and weight loss of the beans, the trials were extended to cover these areas.

Paul and Shane and the planning committee also reported their results and recommendations back to regular meetings of the full GPH membership. The grower and Packhouse staff members of the planning committee had full ownership of the results and recommendations and were able to explain to the rest of the membership why and how changes needed to be made. A field day was also held on one of the trial properties where some of the improved handling practices were demonstrated to GPH suppliers and independent growers.

The trials were also extended to cover the packing and handling of beans in pre-packs, such as punnets, trays and long-life bags and the effects of these practices on shelf life and weight loss. This is seen as an area for potential expansion of the bean market to meet changing consumer needs.

Results

The project was completed in January 2002. The findings show that handling practices in handpicked beans can lead to wide variations in market quality, shelf life and weight loss. Well-grown handpicked beans, properly handled from harvest onwards can have a shelf life of 14 days or longer.

The factors affecting the product quality during the handling stages include:

- *Pre-harvest management:* Moisture stress was found to have a major bearing on bean shelf life and quality. Too much or too little water immediately prior to harvest reduced shelf life by several days.
- *Harvesting:* Harvested beans need to be picked up as soon as possible from the field. Fresh young beans have a high rate of respiration and delays during this period resulted in shrivelling and weight loss.
- *Washing, sorting and packing:* It was found to be important to wash the beans as soon as possible after delivery to the packing shed. This was particularly important if there were to be delays in sorting and packing and the beans were to be stored in an environment with a relative humidity less than 95%. Washing, sorting and packing system design was also found to be very important in reducing losses. Common places where losses occurred include corners in packing lines, between conveyor belts, and elevators and shakers.
- *Storage and transport:* Hydrocooling resulted in the lowest level of weight loss during the storage trials. Relative humidities greater than 95% are recommended for storage to prevent the beans drying out and losing weight. Considerable variation in relative humidity was found in the trials in cool rooms used for bean storage. It is important to separate cooled beans from those yet to be cooled during storage and transport.

Main Points:

- Consistent product quality is important to the entire demand chain.
 - The success of the project stems from it being grower-driven.
 - Shane and Paul worked together with GPH members. The project was aimed at maximising the involvement and benefit for the growers and GPH staff.
 - A planning committee of key growers and staff was formed which was responsible for planning, directing, organising and reviewing the research and identifying how the results could be adapted into their systems as part of the cyclical process throughout the project.
 - The grower and Packhouse staff members of the planning committee had full ownership of the results and recommendations and were able to explain to the rest of the membership why and how changes needed to be made
-

- Successes of projects using the participatory process are reflected in the changes participants make in their current operations or systems of production. Growers are more likely to see the benefits of changing their current mode of operation if they can experience for themselves the benefits of the changes.

Evaluation Reports

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Summary

The workshop began with looking at the needs the QFVG Vegetable Program identified in the 1999 industry workshops. The needs were initially grouped under 4 main headings: Business, Financial and Labour Management, Quality & Marketing and Transport, Consumer Demands and Production. Participants divided into these 4 groups and discussed and grouped the needs into 'like' categories. Priorities were determined for the categories according to grower emphasis, related work in progress and opportunity to improve industry profitability, sustainability and ability to respond to market demands. The real underlying problem of each category was recorded, and from these problem statements potential projects were identified and objectives, activities, team members and action plans were developed.

This report is structured so that the reader can follow an individual issue from the initial grouping of categories through to the action plan. Not all identified categories were completed to the action plan stage. Some only have problem statements while others have project ideas with no action plans attached. This was influenced by time restrictions on the day and the level of expertise present to warrant discussion on some issues

Participants identified the following categories under the 4 main headings:

Business, Financial & Labour Management

- The industry needs to work together (alliances)
- Labour
- Training/Information – *Links with training under the Quality & Marketing and Transport heading*
- Finances

Consumer Demands

- Definition of consumer/customer
- Understanding of the Issue
- Promotion/Education

Quality & Marketing and Transport

- GAP analysis – current industry preferences vs. customer needs
- Training – QA, technical, whole chain – *Links with training under BF&L heading*
- Best practice handling systems code of practice
- Market development

Production

- Pests and Diseases
- Information
- Sustainability

Project suggestions from category problem statements:

- Linking market requirements to production.
- Cool chain training – transport.
- Selected commodity – quantify impact of post harvest on shelf life (including quality).
- Training – resources and packages
 - retailers (product handling)
- Food safety, microbial contamination.
- Accreditation of information suppliers.
- Monitoring systems – specific.
- Minor use chemicals – confirm situation.
- Resistance management strategies, diseases/pests.
- Detection of bacterial diseases in seed.
- Develop training skills for (export) market.
- Scoping study in crops (potential for export).
- On-farm value adding.
- Marketing/business skills education.
- Training – teams
 - business
 - communication
 - marketing
- GAP analysis – customer needs vs. industry performance in the management of product quality and food safety
- Building industry alliances.

1. BUSINESS, FINANCIAL AND LABOUR MANAGEMENT

Category 1.1: Industry needs to work together.

Growers need to work together – on and off farm. What skills do they need (skills) to be able to do this capability?

Priority: High

What is the underlying problem associated with the needs in this category?

- Size of producers small relative to Australian and international standards.
- Very concentrated level of retail ownership.
- Changing marketing environment.
- Oversupply of production - ease of entry.
 - Improved production technology.
 - Transportation.
 - Post-harvest improved.
 - Stagnant consumer demand – loss of market.
- High level of competitiveness, risk in export markets.
- Level of trust along the demand chain.
- Needs to address QA/QMS issues (drive to work together?).
- Lack of/and need to acquire skills in team building/ relationship building.

Project 1.1: Building industry alliances.

The Problem Statement (modified from above):

- Producers require training before development of groups – cultural change.
- Lack of co-ordination between service providers.
- Need an attitude change – producers, service providers, other members of the value chain.
- Lack of a targeted approach to service provision previously → MATCHING OF NEEDS.

Objectives:

- ☆ ‘Capability development’ or ‘Training’
- ☆ To promote the value of training.
- ☆ Development of a network of training providers.
- ☆ Re-examination of the accreditation process of training providers.
- ☆ ‘Co-ordination’ or ‘Alliance development’.
- ☆ Provision of services to facilitate the development of alliances – broad commodity groups/commodity specific/regional/cross-regional.

Team Members:

Name	Title	Organisation	Expertise	Contact Details
Sue Heisswolf	Extension	QHI	Future Profit/ Facilitation/Training Development	Ph 54 662222 Fx 54 623223
Matt Darcey	Principal Horticulturalist	NTDPIF		Ph 08 8999 2222 Fx 08 8999 2049
Tony Cavallaro	Producer	Central Pack House		Ph 4156 1153 Fx 4156 1425
Wes Abel	Importer	Bio Flora		Ph 3823 2677 Fx 3823 2564
Steve Harper	Extension	QHI		Ph 5466 2222 Fx 5462 3223
Shane Comiskey	Veg IDO	QFVG/ Pinnacle		Ph 3213 2441 Fx 3213 2480
Russell Sully	Manager Ind. Develop. VIC			Ph 03 9210 9385 Fx 03 9887 3609
David Milstein		David Milstein & Associates	Strategic thinking & enterprise development consultants	Ph 3857 8202 Fx 3357 6572

Brief Project Activities:

- ☞ Draw up an Action Plan.
- ☞ Need to develop a process/methodology to draw the service providers together (half to full day workshop) – develop a list of service providers.
- ☞ Explore list of providers from other states/regions.

Links with Other Projects:

- Rob Sward – Ag Vic – Research to Practice.
- NSW??? What's happening?
- Tassie – try Michael Hort/Annabel Fulton (TIAR).
- Hort Futureprofit Project – QFVG. + Futureprofit Qld (QA of training/facilitators).
- Links with some other priority areas addressing training at this workshop.
- Ian Atkinson (Nursery Ind. Association) re: accreditation of trainers.

Other Funding Services:

- QRAA
- Supermarkets to Asia
- Management Skills Development Service – State Development
- Variety of regional and local Government.

Action Plan:

Shane Comiskey will co-ordinate and drive the consultation with other potential group members for the action plan development.

The Team will write the action plan ?? tasks ?? as per activities described above.

The project team will involve vegetable growers/industry in project planning and implementation by: **This is to be determined at an action plan meeting, organised by Shane and Samantha.**

Key dates and deadlines for our team for CDP writing are: **Shane to delegate information gathering activities prior to action plan meeting by the end of May?**

One team members signature (on behalf of the team) appeared on the action plan.

Category 1.2: Labour

Access to Labour. Training for Labour. Legal structure not in place. Government policy.

Priority: Medium

What is the underlying problem associated with the needs in this category?

- Perception of the industry as a low paid/lack of prestige.
- High labour content of the industry.
- Profitability not high enough to adequately reward labour (returns not high enough).
- Legal structure associated with work visas.
- 'Red-tape' associated with employing labour particularly in respect to social welfare.
- Unstable nature of employment ie. short periods of employment.
- Reward system for wages in relation to social welfare payment.
- Tax system/legal system does not encourage/recognise labour only contractors.

*There was no potential project or action plan written for this category at this workshop.
A brief action plan may be written for this category at the Action Plan Meeting for project
1.1 Building Industry Alliances*

Category 1.3: Finances

Alternatives to accessing finances/flexibility. Need more information/skills on financial management (managing the business). No government policy/provision to risk manage ups and downs and vegie farming for larger farms – will always be risky business. Broader then just on farm.

Priority: Medium

What is the underlying problem associated with the needs in this category?

- Cash Flow.
- Pressure on profit margins.
- Underlying/over capitalisation – cost of land and machinery and equipment.
- Increasing mechanisation.
- Understanding capital investment decision making.
- Growers do not look at strategies that reduce the need to invest in equipment.

Labour contractor. } Additions made at the bottom of the worksheet
Law and Tax. }

*There was no potential project or action plan written for this category at this workshop.
A brief action plan may be written for this category at the Action Plan Meeting for project
1.1 Building Industry Alliances.*

Category 1.4: Training/Information

Need farmer friendly – do farmers acknowledge the need for training? Where to get the right training?

Priority: Medium

What is the underlying problem associated with the needs in this category?

- Attitude towards training in terms of priorities.
- Commercial imperatives - forcing creates resentment.
- Not enough farmers involved in learning activities to make programs viable.
- Perception that training does not equal value on the farm.
- Women are people most likely to do training, therefore programs need to be suitable for their needs.
- People don't know what they don't know.
- Fear.

*There was no potential project or action plan written for this category at this workshop.
A brief action plan may be written for this category at the Action Plan Meeting for project
1.1 Building Industry Alliances.*

2. Quality & Marketing and Transport

Category 2.1: Training – QA, Technical, Whole Chain

Domestic and Export.

Priority: High

What is the underlying problem associated with the needs in this category?

- Dependent on needs analysis, unclear exactly what is needed.
- In QM, writing skills/motivation of trainees.
- Apprehension with jargon, unfamiliar language.
- Growers unsure how information and skills will benefit them.
- Time away from the farm.

Project 2.1 : Training – resource packages; retailers product handling (F&V)

The Problem Statement (modified from above):

- Highly perishable short shelf life product.
- Product capability issues.
- High staff turnover.
- Multi-product knowledge requirement.
- Limited physical resources ie. limited cool chain facilities.
- Seasonality – variability.
- Senior people have the knowledge – how is this information ‘down-loaded’?

Objectives:

- ☆ Needs to be a totally integrated package ie. products and, can not be retailer specific and whole going to fund it.
- ☆ Producers create training practices (manufacturers) in conjunction with end-users.
- ☆ Develop generic source modules that would suit all major retailers. The retailer would ‘re-package’ this information and present it in their own training/induction system.
- ☆ Over-coming commercial sensitivities.

Team Members:

Name	Organisation
Barry McGlasson	Uni of West Sydney
Training HR Decision Making	
Key retail owners	
Adrian Dahlenburg	SARDI
Russell Sully - * Contact	Ag Vic
Sandra McDougall	NSW Ag, Yanco CMA

Brief Activities:

- ☞ Developing the training package which the retailer tailor-makes for their specific situation.

<i>No action plan was written for this category.</i>
--

Category 2.2: Gap analysis – current industry performance vs. customer needs.

Gap analysis of customer requirements relative to current industry performance in the management of quality and food safety. This project should be completed before the 'Training – QA, technical, whole chain' category is started.

Priority: High

What is the underlying problem associated with the needs in this category?

- There are many sequential customers in the paddock to plate chain. Each has their own needs, but how well are they being met? Thus an audit of the whole system is required.
- The needs of the final customer need to be paramount in this process.
- Inconsistencies in the needs of the various stakeholders in the chain need to be identified and addressed.
- Communication up and down the chain is an important issue and needs to be addressed.
- Research on the needs of the end user/customer in relation to quality and food safety is a pre-requisite to the gap analysis.
- Consumer demands and needs are not static and need to be reviewed at regular intervals.

Project 2.2: Gap analysis of customer requirements relative to current industry performance in the management of quality and food safety.

The Problem Statement (modified from above):

Industry recognises that they have insufficient understanding of their customers' business systems, particularly in relation to product quality and food safety management.

Objectives:

- ☆ to establish the gap between customers needs in the management of product quality and food safety, and current industry performance; and
- ☆ to express the identified gap between customers needs and industry performance in terms of practical system inputs such as training needs, technical deficiencies, issues requiring R&D or extension attention, and industry liaison, coordination and communication.

Notes:

- ☆ Project would be concerned with all sequential customers in the handling chain, but with primary focus on the end customer.
- ☆ The gap analysis would be based on business systems eg. retail, wholesale etc.

Team Members:

Name	Title	Organisation	Expertise	Contact Details
Harley Juffs	Director	Harley Juffs & Associates	Mgt of R&D projects, Industry surveys, Quality Mgt	3263 2930
Ian Whan	Director	Alliance Resource Economics	Economic and strategic analysis and policy	3255 0811
John Bagshaw	Senior Extension Horticulturalist	QDPI	Hort Extension	3896 9681
Rod Jordan	Senior Plant Physiologist	QDPI	Post-harvest systems	5466 2259

Other group members: John Maltby and Jason Cook.

Brief Activities:

- ☞ Adoption of a national focus and network
- ☞ Establish availability of information on customers needs (per crop and general), initially via desk research.
- ☞ Establish performance standards and criteria for the industry eg. food safety systems, timeliness of delivery, through chain forecasting and logistics, level of customer loyalty.
- ☞ Conduct a pilot study on a specific vegetable eg. broccoli (covering the cool chain, packaging, marketing, export issues). Some field monitoring of industry performance in terms of the standards and criteria referred to above would be required.
- ☞ On completion of the pilot study, extend the study to other groups of vegetables within the funding area, eg carrots, lettuce.
- ☞ Training needs would be one of the key system inputs identified by the gap analysis.

Links with other projects:

- Customer research

Other possible funding sources:

- Retails chains
- Export grants
- State Departments of Development/Industry (possible difficulty with obtaining State funding for a national project)

Action Plan:

Harley Juffs will co-ordinate and drive the consultation with other potential group members for the CDP development.

Harley Juffs will write the CDP in consultation with other team members .

The project team will involve vegetable growers/industry in project planning and implementation by: **Liaison with QFVG Extension staff and veg R&D committee for Qld (teleconference); Liaison with industry in other states via IDO's (linkages to be determined); consultation with officers from Depts of Agriculture in other States (especially from NSW and Victoria).**

Key dates and deadlines for our team for CDP writing are: **Draft CDP to Samantha by the end of May.**

Category 2.3: Best practice systems - paddock to plate (codes of practice)

Priority: High

What is the underlying problem associated with the needs in this category?

- On – farm: unaware of the impact of farm handling practices on quality
 - R&D needs to quantify impact.
 - Growers feel lack of influence and power in the marketing chain.
- Packing Shed
 - lack of knowledge.
 - Lack of optimum facilities – beyond financial capability due to size.
 - Food safety issues.
 - Linking to transport – break cool chain.
- Transport
 - Maintaining the cool chain.
 - Poor understanding by some section on needs for transport of vegetables.
 - Economics of industry.
- Market (wholesale)
 - Need to maintain temperature.
 - More product through system – understand need!
 - Infrastructure/market systems.
- Supermarket distribution centre – need to move produce.
- Retail – holding produce/moving through the system = understanding on shelf and rate of quality loss.
- Packaging for consumer demands and produce protection.

Project 2.3.1: Best practice systems – post harvest handling impact on quality and shelf life.

The Problem Statement (modified from above):

- Loss of quality product → where are losses occurring?
- Really several projects → too broad! How to link project, how to find ideal people (everyone has a focus), commodity based?

Objectives:

- ☆ Identify commodities – what needs the most attention? From heavy, leafy, root?
- ☆ To quantify losses in the post harvest handling chains of selected commodities and where those losses are occurring in supply chain. Quality defects (bruising, chilling, water loss, ethylene injury.
 - Harvesting, grading packing damage and then identify what can be done.
- ☆ Methods for controlling these → either identify methods to stop losses (already researched) or develop methods (research). – or is there another related project? Include packaging, modified atmosphere, cool storage.
- ☆ Training or adoption of best practices.

Team Members:

Name	Organisation
Paul O'Hare	DPI
Adrian Dahlenburg	SARDI Cool chain
Alec Harslett	QFVG – grower
Nick Stevens	Harvest Fresh Cuts
Amanda Able	DPI – Phsiol. Packaging
WA Agriculture	Packaging and export experience.

Brief Activities:

- ☞ Some activities were also mentioned in the objectives.
- ☞ Link to customer research (quality defects?)
- ☞ Systems assessment → what happens at each stage? How much?
 - Harvest, grading, packing, transport, between each stage (where kept or how quick moved), cold rooms, distribution centres, wholesale market, retail, home?
- ☞ Identify problems – lit. search of methods already known. Develop methods to stop losses (R&D) for what isn't known. Once known it will feed into guidelines to develop resources for training (others do this).

Links with other projects:

- WA Ag – packaging and export experience
- Ag Vic – Wendy Morgan
- Adrian Dahlenburg – Cool chain management project
- John Bagshaw, Scott Ledger – QA
- NT – Melinda Gosbee (Asian Veges)

Other funding sources:

- Retail supermarkets?
- Strong industry transport people (unlikely).

- RIRDC.
- Pa new crop.

Action Plan:

Adrian Dahlenburg may co-ordinate and drive the consultation with other potential group members for the CDP development.

Adrian Dahlenburg may write the CDP.

The project team will involve vegetable growers/industry in project planning and implementation by:

NB: too big for one project (see above results). Adrian Dahlenburg prepared to negotiate supply chain. Amanda Able – methods for controlling losses (postharvest treatments) HOWEVER if one commodity needs it only – could combine. But WHAT commodity?

Beans – Paul O’Hare

A specific Asian Vege (new crops) – Amanda Able interested, or leafy vege such as lettuce.

Find a specific commodity and then rethink project.

<i>An additional action plan idea was written by this group under this category:</i>
--

Project 2.3.2: Cool chain handling in transport industry.

Action Plan:

Adrian Dahlenburg will co-ordinate and drive the consultation with other potential group members for CDP development.

Adrian Dahlenburg may write the CDP.

Involving industry and key dates: **The rest of the action plan is to be worked on!**

Category 2.4: Market Development.

Developing new (export) markets.

Priority: Not defined.

What is the underlying problem associated with the needs in this category?

- Lack of market intelligence
 - Existing.
 - Potential.
 - What do buyers want.
- Develop viable export markets
 - Scoping study.
 - ‘proper’ export development (not just filling immediate gaps).
- Identify consumer needs
 - Increased domestic consumption.
 - Promotion.

Project 2.4: Market Development

The Problem Statement (modified from above):

Opportunities have been described, but have not been verified or validated for export (domestic) markets. The Australian vegetable industry must position itself as a serious competitor in the global food business, and financial analysis is included in this proposal to identify profitability. Opportunities confirmed will require the development of pilot shipments and a follow up study. There is also a need to train industry in export issues.

Objectives:

- ☆ Identify by scoping study market opportunity to SE Asia.
- ☆ Undertake economic analysis of vegetables to SE Asia to verify and validate profitability.
- ☆ Develop industry confidence in exporting based on profitability and improved relationships with buyers.
- ☆ Further development is the training.
- ☆ Develop viable export markets of 5 vegetables to SE Asia over 5 years. →

WA have done this type of work but have kept it to themselves.

Team Members:

Name	Organisation/Area
Herman Kuipers	NSW Ag
Elizabeth Pike	DPI
Qld IDO	Networking
NSW IDO	Networking
Agsell (NSW Ag Mktg)	
DPI RIBS (Qld Mktg)	
Economist	
Anybody else who is interested	

Brief Activities:

- ☞ Desk-top study to provide market intelligence (including market access).
- ☞ Visit market place/s to confirm viability and also most profitable supply periods.
- ☞ Report back to industry – report to IDO, newsletter etc..

Other Funding sources:

- RIRDC?

Action Plan:

Herman Kuipers will co-ordinate and drive the consultation with other potential group members for the CDP development.

Herman Kuipers will write the CDP.

The project team will involve vegetable growers/industry in project planning and implementation by: **Meet with R&D product group representatives. Networking with IDO's.**

Key dates and deadlines for our team for CDP writing are:

May 30th – draft circulated for comment.

7th July – external funding unit NSW Ag.

CDP by end Sept.

There are no initial problem statements to accompany the following project ideas and action plans.

Project 2.5: Food Safety and microbial contamination.

The Problem Statement:

- Public awareness high levels of microbial pathogens in fresh produce in Australia.
- What are acceptable levels of microbial pathogens on fresh produce in Australia.
- What levels are acceptable for fresh produce destined for different end users.

Objectives:

- ☆ Find out which micro-organisms need monitoring for food safety.
- ☆ Scenarios for initial infection levels, based on different postharvest treatments.

Team Members:

Name	Organisation
Alec Harslett	QFVG & grower
Mick Stevens	Harvest Fresh Cuts
Paul O'Hare	DPI
Amanda Able	DPI
Steve Harper	DPI

Possible Activities:

- ☞ Especially target organic industries.
- ☞ Find out where microbial loading happens in supply chain (which ones).
- ☞ Growth (microbial) in supply chain of load.
- ☞ Acceptable levels (medical organisations?).
- ☞ Trials of bacteria in different supply chain situations.
- ☞ Treatments at different stages (trial) to rid of pathogens.

Links with other projects:

- Robert Premier/Julia Bersing - IHD Vic
- Rob Janiene Jaeger – IHD Vic
- John McPhee – DPI WE TAS
- Centre Food Technology – Bris (Ray Bowden)
- Uni NSW – Food Science

Other funding:

- health organisations.

Action Plan:

Amanda Able may co-ordinate and drive the consultation with other potential group members for the CDP development **on Food Safety within the supply chain.**

Amanda Able may write the CDP – **if can find collaborators.**

The project team will involve vegetable growers/industry in project planning and implementation by: **to be worked out. Dependant upon other work done. A problem with enough people interested.**

Project 2.6: On-farm value adding to fruits and vegetables.

The problem statement:

- About 20-25% of fruits and vegetables are reported to be lost during the value chain.
- Utilisation of low-grade produce.
- Utilisation of by-product streams.
- Utilisation of over production at peak time.
- Value adding with co-operative processing opportunities to meeting economy of scale.

Objectives:

- ☆ Identify potential products for value adding ie. bi-product, low grade, first grade.
- ☆ Identify potential market for value added (eg. market research) products including domestic and export.
- ☆ Develop appropriate technology go on-farm processing.

Team Members:

Name	Organisation	Expertise	Contact Details
Bandu Wijesinghe	Centre Food Tech./DPI	Process engineering	3406 8573
Keith Pitts	Food Science Aust.	Product Development	3214 2000
Tom Franklin	QHI/DPI	Machine design development	3286 1488
Vic Reyes	Food Science Aust.	Packaging and minimal processing	9731 3346
Market research	To be determined...		

consultants			
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Brief Activities:

- ☞ assessment of current status with respect to value adding on farms.
- ☞ Conduct market research to identify consumer needs and wants.
- ☞ Identify appropriate production processes (technology gaps).
- ☞ Feasibility study on identified product (domestic and export) and economic evaluation.
- ☞ Develop products and machinery and processes.
- ☞ Market research on developed products.
- ☞ Technology transfer to potential farmers and growers.

Action Plan:

Bandu Wijesinghe will co-ordinate and drive the consultation with other potential group members for the CDP development.

Bandu Wijesinghe will write the CDP.

The project team will involve vegetable growers/industry in project planning and implementation by:

Consultation with Samantha Bray, QFVG, VGA Vic.

Key dates and deadlines for our team for CDP writing are:

31st May 2000.

Group signatures appeared at the bottom of this action plan.

3. Consumer Demands

The first 3 categories were combined into one project

Category 3.1: Definition of consumer/customer

Identify what the consumer wants. Determine whether 'chain' can or wants to deliver. Clarity of market – signals and communication. What about export customers?

Priority: Medium to High (medium for the export statement)

What is the underlying problem associated with the needs in this category?

We don't really know what affects or drives the consumer to purchase our products. Therefore the stakeholders in the market chain are not working in the same direction. The rapid changes in consumption trends has not been noted by the new market segments that have been developed.

Growers are not sure about the market segments (and the needs of these segments) that they can supply to optimal profitability. This is related to growers not understanding their competitive advantage in a changed market place.

Category 3.2: Promotion/Education

Focus on 'what's in it for me' rather than 'this is what good for you'. Identify opportunities and the promote. Promote in-line with future trends. Branding and competitive advantage.

Priority: Not defined.

What is the underlying problem associated with the needs in this category?

Producers believe that consumers will use more vegetables if they were 'educated' about the benefit of vegetables. Reality is that 'education' is not the process. It is about creating an awareness and a desire for the product.

Need a better understanding of consumer wants and needs; their drivers and work on a planned process (rather than ad-hoc promotion and education).

A changing society has very different demands and wants. The consuming population is a very different society from the production society, with different values and perspective's. Do the industry wants and need and views reflect their customers wants and needs?

Understanding future trends and believing them can be a difficult process.

New opportunities require lateral thinking and post farm gate linkages and networking that is not traditional activity of producers (individuals or groups).

Category 3.3: Understanding of issue

How much do industries understand consumer demands? Is their equity in contribution to R&D outcomes?

Priority: Not defined.

What is the underlying problem associated with the needs in this category?

It is a large shift in thinking for producers and allied rural communities to understand the urban community wants and needs. Sometimes it is even opposed to what producer societies believe.

Understand the drivers that lead to consumer wants/demands.

Need to negotiate an alternative contribution system if you believe that current contribution/benefits is inequitable.

Don't assume that players in chain make rational decisions based on alternative processes. Understand the way decisions are made and act accordingly.

Project 3.1: Understanding consumers and implications **(combined above 3 categories)**

The problem statement: As above 3 categories have stated.

Objectives:

- ☆ Gain better understanding of vegetable consumption trends.
- ☆ Gain better understanding of specific commodity issues.
- ☆ Prioritise high priority areas for industry development.
- ☆ Refine supply chain to meet consumer expectations.

Team Members:

Name	Organisation	Expertise	Contact Details
Mark Herrington	QHI	Breeding	5466 2222
Kylie Brosnan	NCS Australia	Market research	3367 0999
Russell Sully	Ag Vic	Project Management	03 9210 9385
Tim O'Hare	QHI	Post-harvest	5466 2222
Gordon Rogers	AHR	Ag consultant	02 9527 0826
Ken Jackson	QHI	Project management	5466 2222
Eric Coleman	QHI	Marketing/QA	5466 2222

Craig Henderson	QHI	Agronomy/project management	5466 2222
Luke Rickus	Air Farms	Production	5465 8247
Michelle Lakin	QHI	Marketing	5466 2222
Debbie Archbold	Deborah Wilson Consulting	Marketing	3220 1455

Other groups to approach: Fresh Cuts, Moratis?

Brief Activities:

- ☞ Undertake review of existing market research.
Identify major trends driving consumption/consumer behaviour.
Domestic consumer research (domestic and export).
- ☞ Scoping study/industry consultation.
Test issues with consumers/retailers/merchant agents/transporters.
- ☞ Meet with peak industry bodies/develop/workshop results → set priorities for industry development.
- ☞ Test marketing of refined supply systems.
Form growers best marketing groups.
Work with existing grower groups.
Communication of findings to key stakeholders eg.
merchants/retailers/agents/consultants/government advisers.

Links with other projects:

- Previous projects – Australian banana industry consumer research
 - organic frozen vegetables
 - CSIRO consumer attitudes??
 - Various QFVG research

Other funding sources:

- Supermarkets
- Merchants
- Australian Food Council
- State Development – Qld, Vic, NSW
- Supermarket to Asia if export

Action Plan:

Eric Coleman will co-ordinate and drive the consultation with other potential group members for the DCP development (linking consumers to production of vegetables)?

Eric Coleman will write the CDP.

The project team will involve vegetable growers/industry in project planning and implementation by:

Involving marketing groups eg. Valley Fresh co-op.

Sam Bray, Shane Comiskey, Noel Harvey, Rodney Dunn (VSGC)

Russell Sully and Patrick Ulloa and state grower assoc.

Woolworths business strategy people.

Merchants eg. Fresh Cuts people.

Key dates and deadlines for our team for CDP writing are:

Outlines by end May.

CDP by end July.

2nd CDP for submission end August.

A signature appeared at the bottom of this action plan.

4. Production

Category 4.1: Pest and Disease Management

Chemicals. Biological. Pests and diseases. Include cultivars.
Professional services eg. scouting.

<i>3 project ideas were written under this category</i>

Priority: Medium

What is the underlying problem associated with the needs in this category?

- Market demand eg. shelf-life making difficult to control pest and disease control, Australian production system.
- Diversity of vegetable crops makes it difficult to address each industries need in this area.
- Growers required to adopt sustainable practices to meet market demand, which is difficult – information, complicated, chemical availability, understanding alternatives to chemicals.
- Mental silver bullet approach – some recognition of IPM needed. IBM expected as recipe.
- Restrictions on chemical availability – minor use, OHS, NRA, EPA, new products united, old products withdrawn.
- Time factor – development varieties, pest management techniques – alternatives to chemicals.
- Matching market demand with successful production system.

Project 4.1.1: Minor Use registration in vegetable crops.

The Problem Statement (modified from above):

- Confusion amongst industry, including growers, agency staff and consultants on process for achieving legal use of chemicals either on full registration , minor use or other form of chemical use.
- Lack of chemicals available to minor crops or use against minor pests in major crops.
- Conflicting objectives between groups involved in process – NRA, growers, chemical companies.

Objectives:

- ☆ Provide clarification to stakeholders on process involved in achieving minor registration.
- ☆ If the brief of the CPA of the minor use program does not run to generating efficiency and residue data to confirm legal use; we compliment this process by generation of knew efficacy data and residues as required to allow confirmed legal usage for a ??? or minor cops/pests.

Team Members:

Name	Organisation	Expertise	Contact Details
Craig Henderson	QHI	Herbicides	5466 2222
Bronwyn Walsh	QHI	Insecticides	5466 2222
Sandra McDougall	NSW Ag	Insecticides/herbicides	02 6951 2728
David Gallacher	CQU	New Crops	4930 6583
Gary Dorr	UQG	Application	5460 1173
John Hargreaves	QHI	Insecticides	3286 1488
Denise Harslett	Amiens	Grower	4683 3168
John Duff	QHI	Insecticides	5466 2222

Other potential members: NRA, chemical services, AUCA reps to be included.

Brief Activities:

- Action prior to CDP
- ☞ Group receives documentation from workshop (end May)
 - ☞ Group to agree on issues to be put to Janine (early June)
 - Consult with Janine Clark, QFVG about NRA CPA – identify process, including responsibilities for efficacy phyotoxicity, MRL's – residues, length of permit, review of permits, liabilities information dissemination.
 - Including progress from workshop held in 1998 – incl. Liabilities, crop grouping (CODEX), changing legislation.
 - ☞ Send to J. Hargreaves.
 - ☞ J. Hargreaves speak to Janine (mid June)
 - ☞ J.H circulate Janine's response to team end June.
 - ☞ Action plan to deal with gaps – CDP July.
 - ☞ Disseminate information
 - ☞ Training/awareness on process for submitting minor use permits.

Links with other projects:

- CPA
 - QFVG
 - IPM Projects
 - Exotic pest projects
- Identify targets for minor use

Other funding sources:

- Potato committee, Chemical co's

Action Plan:

John Hargreaves will co-ordinate and drive the consultation with other potential group members for the CDP development. **The CDP progress will depend on information received from the NRA and the CPA.**

John Hargreaves will write to the NRA's office of minor use (CPA)

Key dates and deadlines for our team for CDP writing are:

Gather background information by end of June.

Group signatures appeared at the bottom of this action plan.

Project 4.1.2: Resistance Management Strategies for chemical pesticides

The problem statement:

- Identify key pests/diseases in the key areas.
- An area wide/district wide strategy is essential (particularly for pests).

Objectives:

Pilot study which could be taken to a national level.

- | | | | |
|----------------|---|---|---|
| Second Project | { | First Project { | ☆ Identify major pesticides/application technologies in each area. |
| | | ☆ Identify resistance profiles for the major pest populations in each area – baseline resistance data. | |
| | | ☆ Get support from chemical companies → particularly if company is interested in registering a product. | |
| | { | ☆ Develop spray strategy and test in field | |
| | | – | Multiple sites. |
| | | – | Multiple times (when crop is in ground/not in ground). |
| | | – | Test spatially and temporally (to determine if the resistance management strategy works). |
| | | ☆ Disease strategy will be similar. | |

Team Members:

Team structure will depend on the region and pest in question.

- Grant Herron
- Robyn Gunning.
- ACIAR Rothamsted
- QDPI
- CSIRO
- Bowen Crop Monitoring Services
- Chemical Co's
- ACRI
- NSW Ag – Grant, Robyn, Sandra McDougall

Brief Activities:

- ☞ Field surveys
- ☞ Resistance testing
- ☞ Resistance management plan development
- ☞ Testing of management strategy (field)

Links with other projects:

- Western Flower Thrips
- DBM
- Cotton Heliothis
- Silverleaf Whitefly

Other funding sources:

- Chemical co's
- QFVG

Action Plan:

Sandra McDougall (NSW Ag), Paul DeBarro (CSIRO), Ian Kay (QDPI) will co-ordinate and drive the consultation with other potential group members for the CDP development.

??? will write the CDP.

The project team will involve vegetable growers/industry in project planning and implementation by:

Team members will discuss project feasibility within their organisations and communicate this to QFVG and vegetable growers.

Report back and make decision about a CDP for industries consideration.

Provide an estimate of cost. Ask industry whether given cost they will seriously consider a project proposal.

Key dates and deadlines for our team for CDP writing are:

Possibly End of May. Need to gauge whether there is a real interest that warrants the writing of a CDP (this will be decided by the end of May)

Project 4.1.3: Detection of bacterial diseases in seed.

The problem statement:

An accurate and reliable detection method for bacterial pathogens in contaminated seed lots is needed .

Objectives:

- ☆ Identify diseases to be examined.
- ☆ Select a disease.
- ☆ Develop pilot program → molecular techniques/diagnostic probes (PCR) – ELISA.
- ☆ Investigate what methods/if any are currently used by seed companies to guard against the marketing of contaminated seed lots.
- ☆ Test current chemical/hot water treatments on seed lots that are known to be contaminated.
- ☆ Conduct an extensive review of the literature to identify novel molecular techniques which could be used in a detection system.

This project is high risk → long term idea. Could not be tackled by team member in the next few years. More than 5 years → potentially a project could be developed.

Team Members:

- Seed Co. members – Shaun Jackson (SPS), Paul Connelly (Yates), Novartis.
- Peter Stephens (QDPI)
- CRCTPP

- Lindsey Sly
- Mark Fegan
- Steve Akien
- Christine Horlock (QDPI_
- Joanna Arthy
- Jane Moran
- Bob David
- Len Tesoriero (NSW Ag)
- Graham Stirling
- International collaboration – researchers in US, seed companies.
- SARDI?CSIRO (John Curran)

Brief Activities:

- ☞ Some were already covered in the objectives section.
- ☞ Support will be sought from seed companies.
- ☞ Support from industry will be sought through talking to growers in major production areas. QDPI and crop monitoring organisation who have direct contact with growers will be instrumental in doing this.

Links with other projects:

- Work carried out by UQ
- Probes for acidovorax
- Several projects currently being carried out by QDPI.
- Bacterial spot on Cap's
- Bacterial spot and speck on tomatoes
- Bacterial black rot on brassica
- Bacterial canker on tomatoes
- Bacterial fruit blotch on melons

No action plan was written for this project.

Category 4.2: Sustainability

Environment. Economics. Soils. Water. Integrated with production.

Priority: Medium

What is the underlying problem associated with the needs in this category?

- Perception that there is a problem – community strongly think there is a problem, industry wants something done.
- Concern about being thrust upon industry.
- Problems/areas
 - Soil health. – IPM (solution).
 - Water. – Total system.

- Erosion Engage consumer
- Chemical use.
- Plastic.

- Strong community perception that vegetable industry is not sustainable. From industry perspective: also a perception that sustainability also a problem, however need to identify where problems really exist – quantify (AusHort environmental audit should help) and focus. Then plan research to address identified unsustainable practices.

There was no potential project or action plan written for this category.

Category 4.3: Information

Links all issues. Availability. Accountability. Credibility of providers.

Priority: high

What is the underlying problem associated with the needs in this category?

- Plenty of information that is not being accessed.
- Still top down delivery of information. Industry organisation (bottom up) works much better, but not co-ordinated. Growers are directly competing.
- Mechanisation of delivery (poor readers).
- Workshops.
- Extension workers needed to bundle information together for dissemination to growers (who requested).
- Accreditation needed for chemical reps, consultants, government advice agency.
- Value put on information ('free commodity').

There was no potential project or action plan written for this category.

Category 4.4: Scale of Production

Supply
Oversupply
Production – research (agronomy)
Consulting
(market) intelligence
(production) intelligence

Priority: Medium

There was not underlying problem identified or potential project ideas or action plans written for this category.

Workshop Evaluation

1. What aspect of the workshop did you find the most useful/beneficial?

- Bringing people together
- Networking/meeting participants/interacting with colleagues. (6)
- Info from industry (growers). (2)
- Collection of industry professionals.
- Information from John Tyas. (5)
- Talking about the problems the industry sees as priorities.
- Meeting and making contacts.
- Getting the big picture of the veg R&D scene.
- Industry priority information.
- Networking with others in the Aust. Veg industry program. Exposure to priority issues in Qld.
- Linkages with other service providers.
- Familiarity with veg industry needs.
- Forming a group to work out a CDP.
- Discussion with group about minor use issues.
- Actively of the producer/industry needs actually meant taking a broader perspective.
- Last session – particularly since I have never put together a CDP before!
- Working in small groups, the industry needs list → well organised (for the amount of information you were trying to capture).
- The overheads on issues put up by the small groups – capture important ideas.
- Final session.
- Identifying the problem.
- Identifying areas of research along the lines and outcomes of the regional workshop.
- Discussion on range of veg industry issues.
- Presentation of different views.
- For me, the useful thing was getting a feeling for the sort of issues veg growers think are important, and the process for getting funding proposals supported.
- Process.

2. How do you think the workshop could be improved?

- I think expecting people to get as far as CDP's was a little ambitious. I suspect there are some important issues for R&D that don't surface very well in the strong 'bottom up' process. Perhaps some value in getting some 'big' issues identified by the researchers present to compliment the material coming from the grower workshops. I realise researchers were raising their favourite ideas, but this was generally at low level!
- Maybe tried to go too deep into project development process without the best resources on site, particularly if projects are to have a national focus. Maybe need 2 stage process, 1. Agency upper management to develop broad areas and before specialists to participate in, 2. Stage project development.
- I am based in regional development work.
- Process was a little confusing. Clearer setting out of the evaluation process.
- More guest speakers.
- Afternoon session a bit mong, could be better planned.
- Why write CDP with what we think, need to be more aligned with HRDC.

- Should run 6-8 weeks before final submission dates of HRDC or when 'letter of interest' asked for.
- A difficult workshop to organise. The second speaker did not contribute much to the audience present. The team did an excellent job given the difficulty of such a program.
- More time allowed to discuss and define issues at the start of small group work → if not talked through, less likelihood of getting at the real underlying issue and thinking laterally.
- A second workshop to spend more time actually developing the CDP.
- Have the actual HRDC reps who make the project decision in attendance.
- Have more industry involvement in the focussing of what work needs to be done, so that they have more ownership of that conglomeration.
- AUSVEG needs to be present, to answer why projects that address the industry needs will or won't be approved.
- Things can always be improved but I think that the day went well in view of the broad nature of the issues discussed. The day seemed to pass fairly quickly.
- In future, need to be more focussed. Dealt with a lot of very broad spectrum ideas/concepts which you will find common in most ag industries. Question is what is really realistic?
- Before step 2 of process (ID the problem) – allow individual time (5 minutes) to review list and form impressions before getting into group work.
- Using the needs analysis develop specific project 'plans' and invite key stakeholders to comment on and further develop the proposal.
- Get more commitment to the objectives of the day eg. lack of interest in writing CDP. Contact list – participants list before/at the workshop should be valuable.
- Better industry/researcher ratio.
- I think the idea is very good and there was a good turn up, possibly more prominent attendee's from other states.
- More representation of the growers would be desirable so that they have some ownership of the workshop outcomes.
- It would be difficult to do but prior to workshop work out what commodities need most work (or would be funded) and then address problems these commodity industries sees as priorities.
- I had difficulty really seeing where it was all going and how it fitted in with my current work plan. It would have been better if we were briefed more on exactly what was expected so we could have been better prepared. Not all vegetable industries but more focussed.
- More food.
- Have commodity reps present.

3. Do you think that something is really going to happen with the CDP information that your group worked on today? (ie. will a CDP get written and submitted?) Why/Why Not?

- Possibly 50%. Most too broad and hard to master.
- Something – hopefully clarification of issue.
- Yes. (5)
- No. I think individual may go away and develop CDP's on particular aspects/commodities regarding the topic.
- As long as resources are available for these to be viable – Yes. It is hard to commit resources when you are not sure whether they are available.
- Yes, as long as we have the support of the vegetable industry.

- Possibly.
- Unlikely. Discussions were in more general areas than required for CDP.
- Not sure – lot of hurdles to overcome.
- Only if individuals take ownership of groups discussions – more likely ideas will be reworked within organisations.
- May get written and submitted. Unlikely to get funded by HRDC - is too generic.
- I don't think so. Groups were too disparate in skill and knowledge and in a few hours difficult to develop a proposal with some one you just met on the project areas you had little feeling/ownership for.
- Not sure – person listed to do it may push it forward, but concept project not well thought out due to disparate group members meeting for first time and problem identification process slightly flawed (especially at start of process).
- No. Too broad spectrum, high in the sky. When industry collaborators are contacted may find it hard to gain support.
- Yes. A CDP will be submitted because the 'team' believes the concept has potential from a grower view point.
- Discussed minor use activity rather than a project par se: As agreed action plan was formulated, so success in that regard. Whether something will happen after that will depend on what NRA and CPA response is to our initial inquiries.
- Perhaps – depends on degree of ownership and energy people have for the issue. Some will achieve something, others will at least document and flesh out issues.
- Yes – because we have tried this area before and we will try again.
- Yes – but on limited scale because otherwise too big and complex eg. will do a few specific commodities.
- It should get written but it is felt that you may not be funded.
- Yes – a lot of the work has been initiated by veg committee projects need to all come together.
- Yes – if industry considers the issues worth funding.
- No. unrealistic to expect this outcome. Too big a topic, too many issues.
- Maybe – needs a lot of work!
- Not sure.
- I can't really comment on this. I assume the activity today will lead to some new proposals in due course.

4. What other stakeholders do you think should be present?

- Consultants.
- I would prefer to be involved in a workshop with people with whom I am likely to work with so we can develop max realistic Action Plans. Eg. the key people involved in my vegetable industry.
- Others within supply chain.
- Other funding bodies. (2)
- More AUSVEG reps.
- Retailers.
- Food distributors.
- More growers, esp. from other states.
- There were no other stakeholder in the chain present – still producer driven.
- More growers. (4)
- Not many marketing types involved eg. DPI 'RIBS'.

- Need to try and balance representation across disciplines, agencies and sectors of the supply chains.
- Essential that HRDC committee reps attend – the reality is that they make the decisions about what projects get funded. They need to be involved in the development process if they are to have ownership. We will be less likely to support the process if it falls down because political/whim decisions determined the outcomes.
- Much better representation from the people who decide on what projects get up. Where was the chairman of the veg committee?
- All areas of the chain eg. retail, transport.
- Perhaps merchants, exporters, retailers.
- As many as possible involved. National project development is difficult in broad forum such as this. Specialist can't afford to attend from other states.
- Other research providers – universities.
- The group was dominantly research providers. Perhaps a greater involvement of members of the veg sub committees would have been useful.

5. Would you participate in any future vegetable project development workshops?

- Yes. (19)
 - depends on objectives. Other from my team may be more appropriate to attend.
 - If there is more industry representation (growers, retailers and funding agencies).
 - But I would prefer it to more focussed and to have better briefing on what to expect.
- Not sure as I would prefer to develop CDP's with groups that I select to be in.
- Maybe if more focussed.
- Possibly. I believe the industry needs to be more responsible in narrowing its needs to a few project issues and to check how they fit with the AUSVEG plan. We need to be more confident of the other components in the project approval chain and a similar commitment to a transparent process, before we can be confident that the effort for days like today are worthwhile.
- Ambivalent on this but if there was general enthusiasm for another event I would support it.
- Not unless specifically targeted to a relevant issue.
- Depends on final outcomes for this workshop.
- Possibly...I would like to learn more about how R&D for the horticultural industries operates – it does seem somewhat complex and fragmented at present!

6. Any other comments?

- We risk being specialist research people by going down the path of addressing the issues as highlighted by surveying growers. Is this a problem?
- Have food match 2 ½ cups/day.
- Good flexible process, obviously lots of effort. Thanks.
- Very good.
- Room too cold.
- Well done guys! Considering the short time frame allowed for this 'planning' work, a lot of useful info was generated and put together into logical form.
- I think Sam et al. did a very good job getting through the process.
- It was a very courageous process you had for the day.
- Congrats to Sam for tackling a tough proposition and making it easier to get through a full-on day.

- Frankly, the HRDC and REC session were trite and added little value. They did not acknowledge the significant efforts we already put in both areas. The absence of any QFVG senior management and industry reps also suggested that this process was less important in their eyes than the rhetoric suggests. They really needed to be here to cross check that the process was meeting their needs. None of this is a comment on the job or effort by Larissa or Samantha, who did a good job in an unfavourable circumstance.
- It should be remembered that today was only dealing with a portion of the issues out there. Being in the business for a long time there are other issues out there not raised in the survey which is a snapshot at the time. In 2 years another group of issues will arise.
- I was surprised that some more 'bigger' picture issues did not emerge more strongly. Eg. the 'sustainability'/environmental impact issues were 'underdone'. General issues of risk management did not get attention eg. climate variability, market risk. I would have expected to see a stronger 'operations research' flavour in terms of optimal design of production systems to meet climate and market characteristics.

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Other Interested People.

There were a few people who were unable to attend the workshop but are still very interested in the results and perhaps being involved.

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**Vegetable Industry Development Service (VIDS)
Project VG98121**

INTERIM EVALUATION

**By
Ray Russell
&
Jeff Coutts**

June 2001

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SUMMARY

The Vegetable Industry Development Service – Northern Australia Project (VIDS Project) was developed by Queensland Fruit and Vegetable Growers (QFVG) and funded through the Horticultural Research Development Corporation (HRDC). The VIDS Project is designed to develop and facilitate sub-projects that will enhance the performance of vegetable-growing businesses through motivating information and technology information and technology take-up, and through motivating continuous improvement – goals shared with the Australian Government and the Australian Vegetable Industry.

The VIDS Project area is Northern Australia which is geographically defined as vegetable production areas of Queensland, Northern New South Wales and the Northern Territory.

The purpose of this report is to provide an interim evaluation of the VIDS Project's outputs and activities in relation to the stated objectives. The evaluation was performed by desk-top analysis of material provided by the VIDS Project members (Mr Noel Harvey – Project Manager; Ms Samantha Heritage – Industry Development Officer; and Mr Shane Comiskey – Industry Development Officer). To assist in the evaluation process a Logical Framework Matrix (Logframe) was developed (see Appendix A). Section 4 of the report presents each vertical element of the VIDS Project Logical Framework Matrix and comments regarding the achievement of each level.

The VIDS Project has initiated a number of activities and services designed to meet the stated objectives. Data has been gathered for the information and technological needs assessment of the Northern Australian Vegetable Industry through the facilitation of workshops and one-on-one interviews with growers. The needs assessment is in the process of validation through the conduct of a second round of workshops. The resulting reports have been disseminated to key stakeholders and the results incorporated into the National Vegetable Industry Needs Assessment with AUSVEG.

33 project plans have been developed under the VIDS Project. 13 of these projects have obtained a funding for a total of \$505,080. The major project areas are business planning, research (production and prepackaging) and several alliances (export, retail, business operations, processing, marketing, QA and general grower alliances). All projects are considered to be in accordance with Industry needs.

A number of services and activities have been identified by the VIDS Project team and a private consultant has been contracted to deliver programs aimed at increasing producers' business decision making skills and to develop group participation skills towards the development of Value Chain Alliances. A web-based information database is being developed and will be available through the QFVG website by 31 October 2001. The DPI's GrowSearch information service and the Centre for Food Technology are assisting with the collation of the information for the database.

Key recommendations for the VIDS Project are:

1. This evaluation primarily focuses on the physical make-up of the VIDS Project's outputs from the aspect of the provision of services and activities. The ultimate success of this highly participatory project will depend on the impact that implementation of the project has on the producers themselves. For an adequate evaluation of increased knowledge and awareness, reactions and practice change, a more extensive evaluation is necessary, involving direct responses from the industry participants.
2. Output 1.2, the economic analysis of the Northern Australian Vegetable Industry has not been conducted. It is recommended that this be completed as soon as practical to provide validation and direction for the development of industry projects.
3. The marginal regions of the Northern Australian Vegetable Industry – the Northern Territory and Northern NSW appear to be less serviced by the VIDS Project than the Queensland regions. This is evidenced by the lack of

activities and services provided to the regions and lack of developing projects.

It is recommended that more attention be given to these areas.

4. While it is acknowledged that area-specific detail is necessary for regional workshop presentations, and indeed there may be clear differences in the regions, the use of the term 'Northern Australia' rather than 'Queensland' should be used for general material.
5. There is a lack of clear identification or ownership of the services and activities provided under the VIDS Project. It is recommended that the services and activities provided under the VIDS Project should be clearly identified as such.
6. All activities involving industry participants should be evaluated to provide ongoing monitoring of the activities for improvement of delivery and further identification of industry needs.
7. Reports from VIDS Project case studies should be disseminated to industry participants to assist the up-take of improved processes and practices and provide an impetus for improved industry performance.

1.0 INTRODUCTION

1.1 Background to the Vegetable Industry Development Service – Northern Australia Project (VIDS)

The VIDS Project was developed by the Queensland Fruit and Vegetable Growers (QFVG) and funded through Horticultural Research and Development Corporation (HRDC) from the National Vegetable Research and Development levy. The Project is designed to contribute towards building profitability and economic, social and environmental sustainability of the Australian Vegetable Industry through the facilitation of sub-projects that will deliver targeted information and technology. The sub-projects will enhance the performance of vegetable-growing businesses through motivating information and technology take-up, and through motivating continuous improvement – goals shared with the Australian Government and the Australian Vegetable Industry. The project was developed in line with the HRDC and AUSVEG Australian Vegetable Industry Development Plan (HRDC and AUSVEG, n.d.).

The VIDS project has been in operation since July 1999 and is expected to run through June 2002.

1.2 Evaluation Objective

The two objectives for this evaluation are:

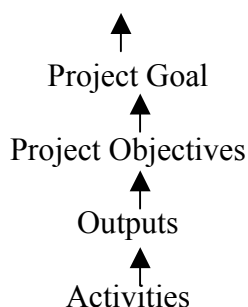
1. To develop a framework for systematic ongoing monitoring and evaluation of the VIDS Project's outputs and activities.
2. To provide an interim evaluation of the VIDS Project's outputs and activities in relation to the stated objectives.

2.0 METHODOLOGY

The evaluation was performed by desk-top analysis of material provided by the VIDS Project members. To assist in the evaluation process a Logical Framework Matrix (Logframe) was developed (see Appendix A). A Logframe is a useful evaluation tool for logically identifying inputs, outputs and the

indicators for measuring progress and evaluating performance (Dart, Petheram & Straw, 1998). A logframe is designed to organise and present the various components of a project in a hierarchy of objective statements (presented in column 1). The vertical hierarchy used in the Logical Framework Matrix for the VIDS project was:

Broader Goal



The design shows that there are causal linkages between each level of the hierarchy. Activities produce Outputs; Outputs are expected to achieve the Project Objectives, which in turn contribute to the attainment of the Project Goal and Broader Goal.

The horizontal logic of the Logframe presented below, identifies the Verifiable Indicators (what will contribute to the achievement of the objective statement presented in the Narrative) and Means of Verification (the method used to verify or measure the achievement of the indicator). Comments and Assumptions about the external environment which may impact upon the achievement of the objective statement are identified in column 4.

Narrative	Verifiable Indicators	Means of Verification	Comments/Assumptions
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The process followed in this evaluation was to identify the verifiable indicators, and comment on the level of achievement of the stated objectives. Section 4 of the report presents each vertical element of the VIDS Project Logical Framework Matrix and comments regarding the achievement of each level.

It should be noted that this evaluation primarily focuses on the physical make-up of the Project's activities and outputs from the aspect of the provision of services and activities. The ultimate success of this highly participatory project will depend on the impact that implementation of the project has on the

producers themselves. Bennett's Hierarchy is an evaluation framework used to depict the hierarchy of objectives towards a change in attitudes and practices of the participants in the program. The hierarchy is diagrammatically illustrated below in Table 1.

Table 1. Bennett's Hierarchy

Bennett's Hierarchy Level	Measurable Indicators.
7. END RESULTS	Social economic, environmental and individual consequences of the program
6. PRACTICE CHANGE	Adoption and application of knowledge, attitudes, skills, or aspirations.
5. KASA CHANGE	Knowledge – What do you know? Attitudes – How do you feel? Skills – What can you do? Aspirations – What would you desire?
4. REACTIONS	Degree of interest, like or dislike for activities, perceptions of the project.
3. PEOPLE INVOLVEMENT	Number of people reached, characteristics of people, frequency and intensity of contact
2. ACTIVITIES	Workshops, interviews, discussion groups, media releases etc.
1. INPUTS	Staffing and resources used.

Source: Adapted from Bennett (1997).

This evaluation adequately reports on the first three levels of the hierarchy. Evaluation of Level 4 indicators is limited to particular activities where participant feedback sheets were provided. For an adequate evaluation of Level 4 through to Level 7, a more extensive evaluation would be required, involving direct responses from the industry participants themselves.

3.0 PROJECT GOALS AND OBJECTIVES

3.1 Broader Goal

The VIDS project has been developed in line with the Australian Vegetable Industry Development Plan. To this end it is envisaged that the outcomes of the VIDS project will contribute to the broader goal:

To enhance the capability of Northern Australian vegetable producers through improved communication, delivery of programs and collaboration within an industry that is profitable, sustainable and market driven.

3.2 VIDS Project Goal

The VIDS Project Goal is defined as:

To facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable

producers enabling access to the required resources for improved industry performance.

3.3 VIDS Project Objectives

The three objectives of the VIDS Project are:

Objective 1:

To determine the Northern Australian Vegetable Industry information and technological needs.

Objective 2:

To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.

Objective 3:

To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.

The outputs and activities developed by the VIDS project to meet the stated objectives are presented on the following page in Table 2.

Table 2: Outputs and Activities for VIDS Project Objectives

Objective	Outputs	Activities
Objective 1 To determine the Northern Australian Vegetable Industry's information and technological needs.	1.1 Needs analysis of the Northern Australian Vegetable Industry. 1.2 Economic analysis of the Northern Australian Vegetable Industry.	1.1.1 Develop and facilitate regional industry workshops to gather data for needs analysis from the Northern Australian Vegetable Industry participants and prepare reports. 1.1.2 IDOs conduct one-on-one farm interviews. 1.2.1 Conduct an economic survey of the Northern Australian Vegetable Industry and prepare report.
Objective 2 To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.	2.1 Project proposals developed in collaboration with industry participants to specifically address the Northern Australian Vegetable Industry needs. 2.2 Case Studies of Best Practice for the Northern Australian Vegetable Industry developed from Best Practice projects. 2.3 Provision of additional services to enhance the business capability of producer groups within the Northern Australian Vegetable Industry.	2.1.1 IDOs to participate in National Vegetable Research and Development meetings, collate state and regional needs and provide input into the Australian Vegetable Industry Plan. 2.1.2 Disseminate the Northern Australian Vegetable Industry needs report to industry. 2.1.3 Conduct a Research and Development workshop with industry researchers. 2.1.4 Provide assistance to industry participants to develop projects in response to the needs of the Northern Australian Vegetable Industry. 2.1.5 Provide an application writing service to assist industry participants to develop project applications and obtain funding for projects. 2.2.1 Establish Best Practice studies in each major production area of Northern Australia. 2.2.2 Assist Best Practice study participants to obtain project funding. 2.2.3 Work with Best Practice studies to achieve project outcomes and develop Best Practice case studies. 2.3.1 Identify the services or activities required by producers to enhance their business

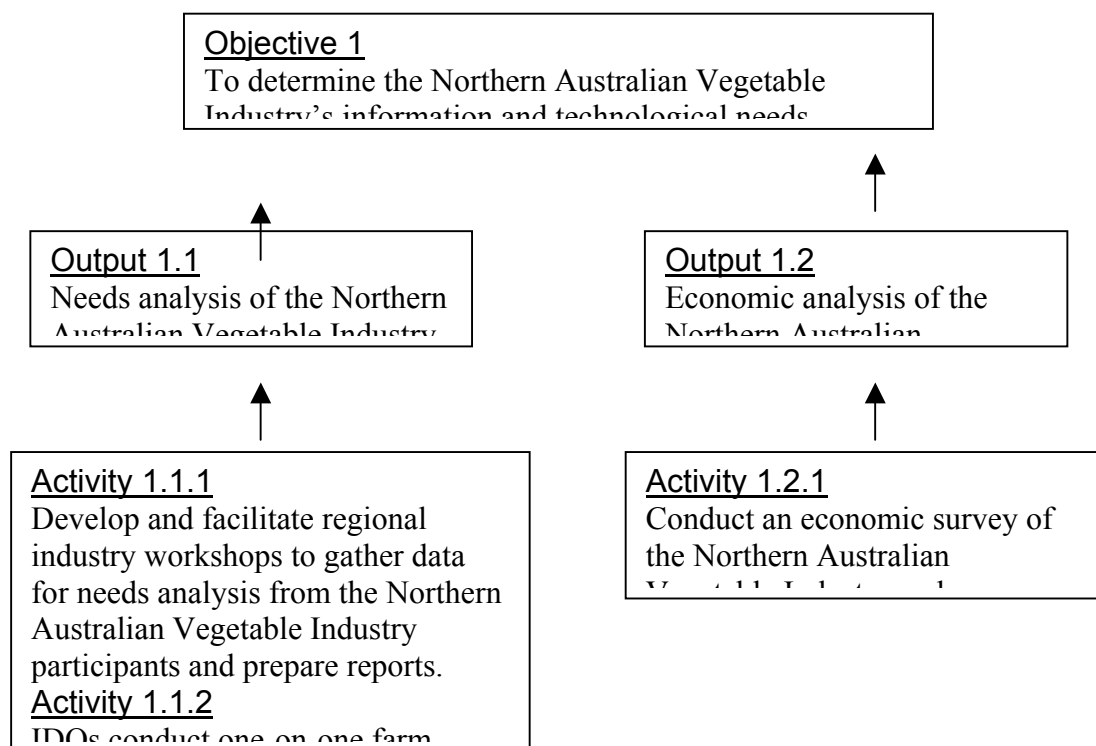
	<p>2.4 Increased awareness of industry participants of the issues relating to marketing and business opportunities in the Northern Australian Vegetable Industry.</p>	<p>capabilities.</p> <p>2.3.2 IDOs to provide assistance to industry participants to form Chain Alliances.</p> <p>2.4.1 Design and facilitate regional workshops ‘The Changing Face of Horticulture’ that will specifically address marketing and business issues beyond the farm gate and encourage industry collaboration in project development.</p> <p>2.4.2 IDOs facilitating networking among industry participants.</p>
<p><u>Objective 3</u> To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.</p>	<p>3.1 A continuous information updating process to service the needs of the Northern Australian Vegetable Industry participants.</p>	<p>3.1.1 Design information packages targeted to the needs of each production area.</p> <p>3.1.2 Develop and facilitate regional information workshops.</p> <p>3.1.3 Develop and facilitate a series of workshops ‘The Changing Face of Horticulture’ specifically addressing marketing and business beyond the farm gate which effects long term business viability.</p> <p>3.1.4 Develop a web-based information database targeted to the needs of the Northern Australian Vegetable Industry.</p> <p>3.1.5 Project team providing current information of projects and activities to the various reporting services available.</p>

4.0 EVALUATION OF VIDS PROJECT OBJECTIVES

Objective 1

To determine the Northern Australian Vegetable Industry's information and technological needs.

The process of how the outputs and activities developed by the VIDS Project team will contribute to the achievement of Objective 1 is illustrated diagrammatically below:



Activity 1.1.1 (towards Output 1.1)

Develop and facilitate regional industry workshops to gather data for needs analysis from the Northern Australia Vegetable Industry participants and prepare reports.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Workshops attended by industry participants representative of the Northern Australian Vegetable Industry. Positive response from industry towards the workshops Round 1 Workshops completed by January 2000. Round 2 Workshops completed by June 2001. Reports prepared and disseminated to industry representatives. 	<ul style="list-style-type: none"> Record of participants at workshops Participant feedback sheets from workshops Workshop reports Workshop reports. VIDS reports and outward correspondence. 	<ul style="list-style-type: none"> Large geographical areas Seasonal production activities may limit workshop attendance. Industry representatives willing to participate in workshops.

Workshops

Ms Samantha Heritage facilitated 13 workshops (Round 1) in the period of June to December 1999. The centres where the workshops were conducted and the number of participants at each activity are listed below in Table 3.

Table 3: Round 1 Information Workshops

<u>Workshop Centre</u>	<u>Date</u>	<u>No. Participants</u>
Ayr	4 November 1999	8 (4 growers)
Bowen	2 November 1999	11 (8 growers)
Brisbane	14 September	10 (6 growers)

Metropolitan	1999	
Bundaberg	24 August 1999	21 (13 growers)
Darling Downs	30-31 August 1999	6 (6 growers)
Fassifern Valley	17 June 1999	20 (14 growers)
Granite Belt	26 July 1999	34 (27 growers)
Gumlu	3 November 1999	13 (13 growers)
Gympie	12 July 1999	37 (31 growers)
Lockyer Valley	24 June 1999	28 (17 growers)
Northern NSW	8 Sep 1999	20 (15 growers)
Rockhampton	15 November 1999	12 (9 growers)
Sunshine Coast	29 September 1999	7 (5 growers)

Participants' Responses

Feedback sheets were viewed for all Round 1 workshops except Darling Downs and Bundaberg. An example of the feedback sheet used is provided at Appendix C. The majority of responses were positive with comments about the value of group discussion and identification of industry needs, networking opportunity and providing stimulation for thought. A summary of most frequent response to the question regarding the impact of the meeting is presented at Appendix C.

Round 1 Workshops completed by January 2000

The workshop series was completed by December 1999. Although the Northern Territory was not included in the Round 1 Workshop series, Ms Larrisa Bilston (VIDS Project member in the early stages of the project) visited the region in May 1999. During the visit discussion were conducted with key industry representatives. A workshop was conducted in the Mackay region in March 2000. The workshop format and content was similar to the other workshops. Attendees at this workshop included vegetable and fruit growers from the Mackay region.

Reports

The results from each Round 1 workshop were documented and compiled into a report 'List of Vegetable Industry Needs 1999 – arising from regional workshops and farm visits'. The needs identified from each production were grouped under five major headings:

- Consumer Demands
- Quality and Marketing
- Business, Financial and Labour Management
- Production
- Transport

A summary report 'Vegetable Industry Needs Identified – a summary' was prepared and disseminated to industry (see Appendix B). The report was completed by December 1999.

Round 2 workshops

To date follow-up workshops have been held in six regions (Fassifern Valley, Lockyer Valley, Granite Belt, Northern NSW, Sunshine Coast and Bundaberg). Follow-up with Brisbane Metropolitan and Darling Downs growers was performed through the conduct of on-farm interviews with individual growers. This was due to the low number of active growers in the area and anticipated lack of attendance if a meeting was held. The purpose of these activities was to present information packages designed to address each production area's needs that were identified in the first series of workshops, to discuss further needs and action required. The

information packages are discussed under Objective 3 outputs and activities. This series of workshops has yet to be completed.

Industry needs for the Northern Territory were addressed during this round of activities. The majority of the vegetable producers are of non-English speaking backgrounds, mainly Vietnamese. The activities in this area have been undertaken in collaboration with the RIRDC and HRDC jointly funded pilot project 'Extension and Communication with Asian Non-English Speaking Background'. This project has a Darwin-based Vietnamese speaking Communication Officer (CO). Support for the Northern Australian vegetable producers by the VIDS Project is in the form of providing support to the CO in the way of information, resources, national representation and funds to help develop educational and training needs. Ms Heritage visited Darwin in June and November 2000.

Activity 1.1.2 (towards Output 1.1)

IDO's conduct one-on-one farm interviews with Northern Australian vegetable producers.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Number and quality of on-farm interviews	<ul style="list-style-type: none">• Reports from interviews• Survey methodology elaborated.	<ul style="list-style-type: none">• Targets willing to be interviewed.• Growers may not contribute well in a group situation.

One-on-one farm interviews were conducted as a follow-up or a lead-in to the conduct of the workshops in each production area. No records of interviews were found for the Lockyer Valley, Fassifern Valley or Darling Downs. The documentation provided presents the results of the visits as a list of the needs identified by the growers. There was no record of the number of visits, the interviewee or questions asked.

The method used for these interviews was an informal conversation conducted on-farm with individual producers who were identified as key industry informants. Most issues gathered from these interviews were also identified through the conduct of group discussions during the workshops.

Output 1.1

Needs analysis of the Northern Australian Vegetable Industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Reports prepared identifying needs of the Northern Australian Vegetable Industry.• Validation of the needs by industry.	<ul style="list-style-type: none">• Workshop results and reports• Feedback from industry	<ul style="list-style-type: none">• Industry participation in needs analysis• Growers' needs have not previously been well articulated

Reports

To gather data, Ms Samantha Heritage, conducted 13 regional workshops (Round 1). These workshops adequately covered most of the production areas of Northern NSW and Queensland, but did not include the Northern Territory. Mackay and the Far North Queensland centres of Mareeba and Atherton Tableland were also not included in the workshop series. The outcomes from each Round 1 workshop were presented as individual reports and later compiled into a summary report in December 1999 (see Appendix B).

Results from the second round of workshops, Round 2, (yet to be completed) have been documented in two reports dated August 2000 and February 2001. These reports present the list of needs including newly identified areas of needs as well those needs from 1999 that could not be sufficiently addressed with current information and services.

Validation of the needs by industry

The outcomes of each Round 1 workshop were presented in a written report that was then sent to each workshop participant and the regional office of the Department of Primary Industries. The summary report of the Round 1 workshops was presented to the QFVG Vegetable Committee, QFVG program managers and participants at the Vegetable Project Development workshop. The report was also sent to AUSVEG, HRDC and IDOs nationally.

Advice from Ms Heritage was that no initial feedback was received from the Information Workshops about the workshop reports. However, validation of the needs has been gained through the conduct of the Round 2 workshop series (yet to be completed) and further one-on-one interviews. During these activities, the 1999 needs list was presented, solutions to needs discussed, and new issues identified. Reports from the each Round 2 workshop were also sent to each participant and the regional Department of Primary Industries. The Round 2 series and activities have yet to be completed. The refined needs list has also been included in the national industry development needs list with AUSVEG.

Activity 1.2.1 (towards Output 1.2)

Conduct an economic survey of the Northern Australia Vegetable Industry and prepare report

Verifiable Indicators	Means of Verification	
<ul style="list-style-type: none">• Survey conducted by November 1999.• Report prepared by January 2000.	<ul style="list-style-type: none">• VIDS reports.	

Survey conducted by November 1999 and report prepared by January 2000

Unfortunately due to the early departure of economist David Adamson from the Project, the economic analysis of the industry has not been conducted.

Originally the purpose of this report was to provide guidance to the development of industry projects based upon the correlation of identified needs and economic impact. Advice from the Project team is that this output will be redefined and redirected more towards supply chain efficiency. An economist is to be contracted to perform the work, with September 2001 as the anticipated completion date.

Output 1.2

Economic analysis of the Northern Australian Vegetable Industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Report prepared describing the economic environment of the Northern Australian Vegetable Industry.	<ul style="list-style-type: none">• Report	

This output has not been achieved to date.

Summary and Comments for Objective 1

To determine the Northern Australian Vegetable Industry's information and technological needs.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Industry needs articulated• Industry validation of needs	<ul style="list-style-type: none">• Resulting reports – VIDS Project team• Reports disseminated to industry and feedback received.	<ul style="list-style-type: none">• Industry participation in needs analysis.• Adequate response from industry may be hard to achieve due to time and lack of responsiveness.

Industry needs articulated

Data was gathered for the needs analysis (Output 1.1) via the delivery of a series of Round 1 Information Workshops (Activity 1.1.1) and one-on-one interviews (Activity 1.1.2) with Industry participants. Results from the workshops were collated and presented in report form with a summary report disseminated to key Industry stakeholders. Most major vegetable production areas of Northern Australia were included in the workshop series. Participant feedback sheets were obtained from each workshop and results indicate that the activities were well received. The workshops were delivered by the stated completion date of January 2000.

The delivery of the workshop in the Northern Territory was perceived to be too difficult due to the majority of growers in the region being from non-English speaking backgrounds. Workshops were not conducted in Far North Queensland due to the anticipated poor level of attendance. A workshop was conducted in Mackay in March 2000, which was outside the timeframe for inclusion in the needs analysis.

One-on-one interviews (Activity 1.1.2) were conducted on-farm with a number of growers from each region included in the workshop series. Results of most of the interviews were included in the reports for each region, however no results were found for Lockyer, Fassifern or Darling Downs areas. The results for this activity were documented as a list of needs identified by the growers. The interviews were conducted on an informal basis. There was no record of the number of visits, the interviewee or questions raised during the course of the interview.

The Round 1 Information workshop series appear to have been a successful method to gather the data for the Industry needs analysis. The omission of some areas is a concern. While the interviews were conducted on an informal basis, it is recommended that accurate records be kept.

Industry validation of needs

The outcomes from each Round 1 workshop were presented as individual reports and later compiled into a summary report (see Appendix B). Regional reports were given to each workshop participant and other key stakeholders.

A second series of workshops (Round 2 Information Workshops) under Activity 1.1.1 has been developed as a follow-up to the first series. The second series were designed to gain validation of the information recorded from the Round 1 series of workshops, and through discussion with participants, address these issues via presentation of information packages for each region, identify needs not raised previously and action required. The completion date for Round 2 series was June 2001. To date, workshops have been held in six regions and interviews conducted with individual

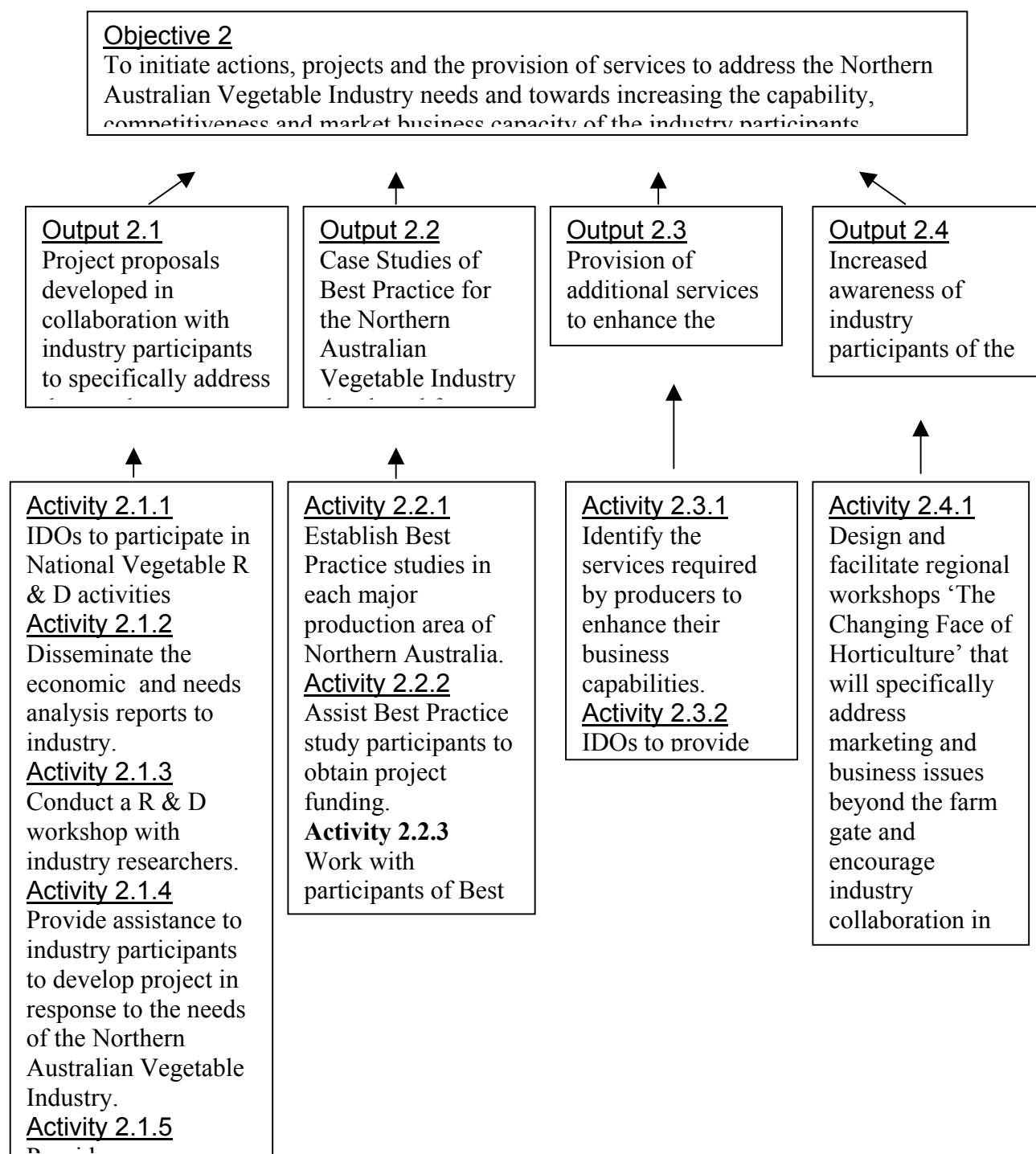
growers from Brisbane and Darling Downs. It is anticipated that this series will be completed by October 2001. Two interim reports have been compiled from this series to date and the revised needs list has been included in the national needs list with AUSVEG.

The economic analysis (Output 1.2) remains outstanding. It is recommended that the economic analysis be conducted as soon as practical, to provide validation and direction for the development of industry projects.

Objective 2

To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants

The process of how the outputs and activities developed by the VIDS Project team will contribute to the achievement of Objective 2 is illustrated diagrammatically below:



Activity 2.1.1 (towards Output 2.1)

IDO's to participate in national vegetable research and development meetings, collate state and regional needs and provide input into the Australian Vegetable Industry Development Plan.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • IDOs participating in the national activities. • Number of national meetings attended by IDOs • National needs list developed. 	<ul style="list-style-type: none"> • IDO activity records • IDO activity records • Reports 	<ul style="list-style-type: none"> • Networking limited by geographical dispersion. • National meetings only held twice a year.

IDO's participating in the national activities

The two IDOs connected to this project, Ms Heritage and Mr Comiskey, participate in the National Research and Development Levy meetings as well the National IDO activities. There are two Research and Development Levy meetings held per year. The national IDO group comprises two from Northern Australia and one representative from each other state in Australia. The IDO group meetings are held in conjunction with the national R&D meeting. In addition to these meetings a Vegetable IDO meeting was held at Rydges Hotel, Brisbane on 16 January 2001 (see report attached at Appendix D).

National Needs List

At the Vegetable IDO meeting in January 2001, it was agreed that the national needs list was to be collated by March 2001. Ms Heritage is facilitating the collation of the list. To date, input from Tasmania, Western Australia and New South Wales remains outstanding. The purpose of the list is to provide a useful reference source for the

national IDOs and vegetable researchers. The information provided to date has been forwarded to all national IDOs as well as to HRDC and AUSVEG.

Activity 2.1.2 (towards Output 2.1)

Disseminate the Northern Australian Vegetable Industry needs report to the industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • Report completed by March 2000. • Reports sent to workshop participants and relevant stakeholders in each production area. • Report presented in a useable form by industry. • Report adequately captures data obtained from workshops and interviews. 	<ul style="list-style-type: none"> • Report • Records • Report • Evaluation of report against workshop reports and interview data. 	<ul style="list-style-type: none"> • Participants in assessment are representative of the industry as a whole. • Cost of report production and mail-out may be prohibitive.

Dissemination of Reports

The outcomes of each Round 1 workshop were presented in a written report that was then sent to each workshop participant and the regional office of the Department of Primary Industries. The summary report 'Northern Australia Vegetable Industry Needs – Summary Report' (completed in December 1999) was sent to grower representatives, selected DPI officers, national IDOs, AUSVEG and HRDC (see Appendix B for report). It was also presented to the QFVG Vegetable Committee, QFVG program managers and participants at the Vegetable Project Development workshop.

Two further reports have been written following the yet to be completed Round 2 workshops. The report dated February 2001 is included as Appendix E. These are interim reports and therefore have not been disseminated to date.

Report presentation

The workshop reports were very well presented with the list of needs and issues identified from the one-on-one farm visits as well as the results of the brainstorming workshop session concerning the question ‘What issues should the R&D levy be spent on?’ The summary report is attached at Appendix B. This report collates the needs as identified by the participants at the Round 1 workshops. The report appears to adequately capture the data presented in the individual workshop reports

The report ‘Vegetable Industry Needs- Northern Australia 2000’ is attached at Appendix E presents a refined list, identifying the needs and the region where the need originated. As the Round 2 workshop series is yet to be completed, this report has not been disseminated.

Activity 2.1.3 (towards Output 2.1)

Conduct a Research and Development workshop with industry researchers

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Workshop conducted within six months from completing the first round of information workshops.• Workshop attended by key researchers from the vegetable industry.• Positive response to workshop from attendees.	<ul style="list-style-type: none">• Workshop report• Workshop attendance record• Response sheets from workshop.	<ul style="list-style-type: none">• Timing of workshop may not be suitable.• Researchers are responsive to workshop objectives.• There is adequate funding available for projects.• Most research is primarily focussed on on-farm production rather than post-harvest or business management.

The Vegetable Project Development Workshop was conducted in April 2000. The workshop attracted 58 participants from a broad range of both government and private research organisations as well as producers and processors (refer to the list of participants as attached at Appendix F.

The participant feedback from the workshop indicates an overall positive response to the workshop.

Activity 2.1.4 (towards Output 2.1)

Provide assistance to industry participants to develop projects in response to the needs of the Northern Australian Vegetable Industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • IDO assisting in the development of project plans in all major production areas of the Northern Australian Vegetable Industry. • Evaluation of projects against needs list. 	<ul style="list-style-type: none"> • Project plans • VIDS reports • Project description and needs list. 	<ul style="list-style-type: none"> • Growers reluctant to get involved in collaborative projects. • Projects may be seen to benefit individual needs rather than industry needs.

Project Plans

IDO Mr Shane Comiskey is responsible for the development of industry related projects under VIDS. The main priority of this service is to assist industry participants to develop projects and access to funding if required. At the time of writing this report, 33 project plans have been developed, or are in the process of development (see Table 1 of Appendix H). The number of projects for each production area of the Northern Australian Vegetable Industry is detailed below in Table 4.

The Marketing and Business Development Service provided by QFVG's Vegetable Program, aims at providing the growers with additional services for project development on a as needs basis (see Marketing and Business Development Service brochure at Appendix G).

Table 4. Number of Project Plans Developed in Northern Australia

Region	Number of Project Plans
Granite Belt	2
Fassifern	3
Lockyer	4
Sunshine Coast	2
Gympie	4
Bundaberg	2
Mackay	1
Bowen/Gumlu (NQ)	2
Burdekin/Ayr	1
Far North Qld (FNQ)	3
Brisbane Metro	2
Northern NSW	1
Northern Territory	0
Granite Belt and Lockyer	1
Lockyer, Gympie and NQ	1
Lockyer and NQ	1
Qld wide	1
Interstate	2
Total number of projects	33

As shown by Table 4, all major production areas are represented, with the exception of the Northern Territory. It is anticipated that projects will be developed in the Northern Territory following the presentation of ‘The Changing Face of Horticulture’ workshops in July. Apart from the area specific projects, there are three cross-regional collaborative projects, one Queensland-wide project and two projects involving interstate organisations. The projects are presented in detail in Table 1 at Appendix.H.

From the 33 listed projects, three were not been implemented:

➤ Choko Producers Alliance – Sunshine Coast

This project was not implemented due to lack of producer interest once the project plan was developed.

➤ Red Coral Lettuce to Japan – Brisbane Metro

This project did not proceed due to Japanese quarantine restrictions.

➤ Sweet Potato Producers Alliance – Northern NSW

This project did not proceed due to lack of producer interest once the project plan was developed.

The non-implementation of the Sweet Potato Producers Alliance Project has resulted in there being no projects currently in operation in Northern NSW. The lack of activity in the marginal regions of the VIDS Project area, namely Northern NSW and the Northern Territory is of some concern.

Evaluation of projects against needs list

Table 7 of Appendix H details the projects according to project type. 3 major categories for the projects were identified with 7 sub-categories for Alliances, as shown below in Table 5.

To assess whether the projects have been designed to meet the Northern Australian Vegetable Industry needs, Table 5 below, shows the project descriptions cross-referenced with the needs list developed under Activity 1.1.1.

Table 5. Project Categories and Identified Needs

Project Category	Number of Projects	Region	Identified Need
Business planning	3	Sunshine Coast, FNQ, NQ	❖ Information on getting out of industry altogether • Business and Market Development Service
Research	1 (Production) 1 (Prepackaging)	Granite Belt Burdekin/Ayr	Many production issues were raised in the needs list. • New product development – ...prepackaging and other opportunities ♦ Cost of packaging needs to be cheaper.
Alliances:			
Export	2	Granite Belt, Lockyer	□ Export Markets, # Export – identify new markets
Retail	5	Fassifern, Lockyer, NQ, FNQ, Brisbane Metro	❖ Work with chain stores to develop better systems. • What does the consumer want? # Consumer needs and education

Business Operations and Procedures	3	Granite Belt, Fassifern, Gympie	<ul style="list-style-type: none"> • Business and Market Development Service
Processing	4	Lockyer, Gympie, NQ, Bundaberg	<ul style="list-style-type: none"> ◆ Cost of packaging
Marketing	3	Gympie, Bundaberg, NQ	<ul style="list-style-type: none"> ❖ Market research to identify new markets • New product development □ Niche markets ♣ Market research – case studies.
Quality Assurance	2	Fassifern, Qld-wide	# Standardised description for each type of product.
General Alliances	6	Lockyer, Gympie, Mackay, NQ, Interstate	<ul style="list-style-type: none"> ➤ Grower unity • Alliances
❖ Lockyer		# Sunshine Coast	
• Brisbane Metro		♣ Bundaberg	
◆ Darling Downs		➤ Fassifern	
□ Northern NSW			

Table 5 above, shows that the projects are contributing to meeting the needs identified from Objective 1. It is interesting to note that the areas where the need was identified are not necessarily the areas where the projects have been implemented. This may be due to the participants at the Regional Information Workshops seeing that a particular need had been already identified by another region, thereby deeming it unnecessary to voice that same need, or the participants in these projects did not attend the Information Workshops. Not having access to all project participant lists or all participant lists from the Changing Face of Horticulture Workshops, limited assessment of the situation to speculation. However, the IDOs share information and communicate on a regular basis. Undoubtedly, the projects have been developed by drawing together interested parties to participate in an activity that is in response to a jointly recognised need. The dissemination of the information and knowledge gained through the implementation and reporting of the project outcomes should be an assessment criterion for future evaluations of the VIDS Project.

Activity 2.1.5 (towards Output 2.1)

Provide an application writing service to assist industry participants to develop project applications and obtain funding for projects.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • IDO to develop project proposals for submission to appropriate funding organisations. • Awareness of the service within the industry. 	<ul style="list-style-type: none"> • Project proposals • Response from funding organisations. • Industry response to the service. • Methods used for raising awareness of service. 	<ul style="list-style-type: none"> • Funding is available for projects. • Growers not aware of available funding resources.

IDO to develop project proposals for submission to appropriate funding organisations.

Mr Comiskey has developed, or is in the process of developing, project proposals for 19 of the 33 projects listed at Appendix H. Points to note:

- Of the 19, 13 projects have been given funding approval (see Table 2 at Appendix H).
- Table 4 at Appendix H lists the eight projects that are in the proposal development stage or waiting for funding approval. Two of these projects have already received partial funding and are waiting for additional funding approval.
- A total of 11 projects have been implemented without funding (see Appendix H Table 3).
- Three of the 33 projects have not been implemented (see Table 5 at Appendix H).

Table 6 below, summarises the stage of development for all projects and funding received to date:

Table 6. VIDS Industry Project Funding Summary

	Funded Projects	Non-funded Projects	Projects as proposal stage or waiting approval	Projects not Implemented	Total
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Vegetable Industry Development Project (July 1999 – June 2002)
Evaluation Report June 2001.

Number	13	11	6 (plus 2 that have received partial funding)	3	33
Funding	\$505,080				

Reasons provided by Mr Comiskey in relation to the non-funded projects were either the projects did not fit the funding criteria supplied by funding bodies, funding was not required for the project or that the project participants did not wish to apply for funding.

Industry response to the service

Mr Comiskey has observed an increased response from industry to the service. The increased response is indicated through the number of representatives at industry events who are familiar with the service. Mr Comiskey also advises that the funding application service will never be applicable to every producer due to the scope of the projects, available resources and timing involved in completing the project applications.

It is outside the scope of this evaluation to conduct an industry assessment of this service, however it is recommended that the final evaluation of the VIDS project include such assessment.

Awareness of the service within the industry

Mr Comiskey lists the following methods used to raise awareness of this service:

- Marketing and Business Development Service Brochure.
- IDO activity updates supplied to the 'Vegetable News' inserts in the QFVG publication 'Fruit and Vegetable News Queensland', the nationally distributed 'Good Fruit and Vegetables' magazine and the QFVG website.
- One-on-one meetings with growers.
- Presentations to local producer associations eg. Bundaberg Fruit and Vegetable Growers Association, Bowen and District Fruit and Vegetable Growers.
- Changing Face of Horticulture presentations include discussion of the service.

- Awareness of service passed on to producers from associated industry service providers eg. Department of State Development, DPI, AFFA, NSW Ag.

The Marketing and Business Development Service brochure is attached at Appendix G and a copy of the May issue of the 'Vegetable News' is attached at Appendix I. The May issue features the Marketing and Business Development Service, with articles explaining the service and summaries of three case studies. The 'Vegetable News' is included as an insert to the 'Queensland Fruit and Vegetable News', a monthly publication that is distributed to all levied producers in the Northern Australian Vegetable Industry.

The continued promotion of the service through the QFVG publications, together with the additional promotion of the service through the other mediums listed above, should ensure that industry participants are aware of the service.

Output 2.1

Projects developed in collaboration with industry participants to specifically address the Northern Australian Vegetable Industry needs.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • Project plans developed in all areas of the Northern Australian Vegetable Industry. • Funding obtained for eligible projects. • Evaluation of projects against needs assessment. 	<ul style="list-style-type: none"> • Project plans • VIDS Reports • Project proposals • Feedback from funding organisations • Project plans and needs assessment. 	<ul style="list-style-type: none"> • Growers reluctant to get involved in projects. • Funding available for projects • Some growers are not willing to access the service. • Projects may only target individual needs rather than industry needs.

Project plans developed in all areas of the Northern Australian Vegetable Industry

Industry participants from most regions of the VIDS Project area have been involved in the development of projects. The Northern Territory is one notable exception. Mr Comiskey does intend to visit the region in July 2001 and conduct two workshops, through which he hopes will stimulate project involvement. A project plan was developed in Northern NSW for a Sweet Potato Producers Alliance (Project 10 – see Appendix H Table 1). However, the project did not proceed due to lack of interest from the producers once the plan was developed.

Funding obtained for eligible projects

13 of the 30 implemented projects (or currently being developed) have received funding to date, for a total of \$505,080. Eight proposals (including two already partially funded projects) are currently waiting for funding approval. The level of funding is indicative of the success of the activities designed to achieve this output.

Evaluation of projects against needs assessment

Table 5 under Activity 2.1.4 presents the projects against needs identified from the report ‘Northern Australian Vegetable Industry Needs – 2000’ (see Appendix E). The projects are considered to be designed in response to several Industry needs.

Activity 2.2.1 (towards Output 2.2)

Establish Best Practice studies in each major production area of Northern Australia.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> At least one best practice study established in each major production region. Communication of outcomes of activities to industry. 	<ul style="list-style-type: none"> VIDS Project reports. Industry publication and case study reports. 	<ul style="list-style-type: none"> Growers are responsive to best practice groups, which have a commercial focus. Lack of trust between industry participants. Time to be involved in projects may limit interest.

Best Practice Studies

The term ‘Best Practice’ means different things to different people. What is common to the many definitions, is the focus on process. Ronan and Cleary (2000), suggest that there are two key aspects of best practice studies in agriculture: one which focuses on excellence in profitable commodity production; and the other which focuses on profitable deployment of human capital resources into both farm and off-farm endeavour.

From examination of the project descriptions supplied by Mr Comiskey, 21 projects are considered to reflect Best Practice attributes. The projects are listed below in Table 7.

Table 7. Best Practice Studies in Northern Australia

Region	Project Name and Number	Brief Description
Granite Belt	1. Kool Country Packers Ballandean	Business planning involving cool chain and quality management systems.

	3. Wombok to Japan	Process of exporting product.
Fassifern	5. Fassifern Packers Business Applications	Development of a central business centre incorporating a number of separate packing and marketing entities, transport operations and other associated business enterprises.
	6. Environmentally Safe Produce	Network of producers producing vegetables under an agreed set of guidelines for ecologically sustainable production.
Lockyer	3. Wombok to Japan	See above description
	7. Bean Prepackaging Research Alliance	Development of packing technology to supply prepackaged beans to the chain store retail market in Australia.
	10. Beetroot Alliance	Producer group developing improved linkages with their major processor customer.
	11. Eco Foods	Using an integrated agri-aquaculture fertigation system to minimise environmental impacts whilst increasing per unit area turnover.
	12. Lockyer Valley Export Group Alliance Development	Development of a successful exporter alliance to international business houses.
Sunshine Coast	14. Sunshine Coast Future Focus	A program provided to growers to enhance their business decision making skills.
Gympie	7. Bean Prepackaging Research Alliance	See above for description.
	15. Gympie Local Producer Association	Development of a regionally based producer association.
	16. Gympie Packhouse Redevelopment	Improvement of the internal and business relationships of the producer group owned business.
	17. Best Practice Bean Handling Project	Identification of the best practice handling schemes necessary to produce and market high quality handpicked beans.
	18. Gympie Packhouse Marketing Development	Development of a collaborative marketing program with chain stores and individual businesses.
	19. Bundaberg Food Processing Park	Identification of the steps necessary to develop supplier and processor networks.
	20. South Burnett Small Crop Growers Alliance	Development of an appropriate marketing and business development program.
North Qld	7. Bean Prepackaging Research	See above for description.
	8. East Coast Bean Alliance	See above for description.
	23. Gumlu Producers	Improving marketing skills and

	Alliance	identification of future chain projects.
Far North Qld	25. Qld Taro Alliance	Development of improved linkages with their major customers (chain retailers and wholesalers).
	26. Atherton Tableland Future Focus	A program provided to growers to enhance their business decision-making skills.
	27. Mareeba Future Focus	A program provided to growers to enhance their business decision-making skills.
Brisbane Metro	28. Asian Vegetables Product Development	Aim of project is to lift the profile of the Asian Vegetable Industry at the retail level.
Qld wide	31. Australian Bean Producers Alliance	Producer alliance to develop best practice quality assurance procedures for Australian bean producers.

The 22 projects have been implemented or are in the process of development.

Regions where Best Practice case studies have not been implemented are Northern NSW and the Northern Territory. The omission of these marginal areas from project activities is an area of concern.

Communication of outcomes of activities to industry

For the purposes of this evaluation, the methods used by Mr Comiskey to communicate outcomes to the industry were examined. The methods used to communicate activity outcomes include:

- IDO activity updates supplied to the 'Queensland Fruit and Vegetable News', 'Good Fruit and Vegetable News' and 'Vegetable News'.
- One-on-one meetings with growers.
- Presentations to local producer associations eg. Bundaberg Fruit and Vegetable Growers Association, Bowen and District Fruit and Vegetable Growers.
- Changing Face of Horticulture presentations include discussion of the projects.
- Industry Events eg. Growing for Profit Day and Bundaberg Expo.

These methods appear to be effective mediums. The effectiveness of these methods in reaching the target audience should be assessed in future evaluations.

Activity 2.2.2 (towards Output 2.2)

Assist Best Practice study participants to obtain project funding.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Project proposals written and submitted to funding bodies for approval.	<ul style="list-style-type: none">• Project proposals and feedback received from funding bodies.	<ul style="list-style-type: none">• Funding is available for projects.• Time and skill needed to develop projects.• Growers not aware of available funding resources.

Of the 22 Best Practice projects presented in Table 7, Mr Comiskey has developed 17 (one project involves separate funding proposals) project proposals, or is in the process of developing the proposals for submission to the funding. To date 13 projects have received funding. The total funding for these 13 projects to date is \$505,080. The Eco Foods project in the Lockyer accounts for over half the funding. The list of funded projects and funding details can be found in the Table 2 in Appendix H.

Activity 2.2.3 (towards Output 2.2)

Work with participants of Best Practice studies to achieve project outcomes and develop best practice case studies.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • IDO maintaining contact with Best Practice participants and providing guidance for project completion. • Best Practice processes identified and articulated into report form. • Case studies of Best Practice developed and reports disseminated to industry. • Case studies of best practice have industry-wide application. 	<ul style="list-style-type: none"> • Progress reports from best practice group projects. • IDO contact records. • Progress reports from best practice group projects. • Project reports. • Industry feedback • Case Studies evaluated against needs assessment. 	<ul style="list-style-type: none"> • Maintenance of groups is a high-input activity. • Report is written in a usable form for grower groups. • Models are applicable industry-wide.

IDO contact with Best Practice Groups

The impetus for industry participants to become involved in projects usually stems from attendance at the ‘Changing Face of Horticulture’ presentations (detailed in Activity 2.4.1), or other industry events such as the Growing for Profit Day held in Gympie November 15, 2000. Mr Comiskey’s involvement with the Best Practice studies varies with the activities designed for each project.

An example of Mr Comiskey’s involvement in specific project activities has been provided by the availability of two project proposals: Project 16 Gympie Packhouse Redevelopment; and Project 20 South Burnett Small Crop Growers Alliance.

(a) Gympie Packhouse Redevelopment: Mr Comiskey provided guidance throughout the project with one or two visits per month to Gympie. Specific activities were detailed for each visit. Monitoring of the project's progress was also performed by Mr Comiskey through monthly discussions the Gympie Packhouse Management Committee and periodic one-on-one interviews with each of the shareholder and associates. Regular progress reports were supplied to the funding provider.

(b) South Burnett Small Crop Growers Alliance: This project achieved partial funding and involved a series of field trips, which were organised and conducted by Mr Comiskey. The participants in the project, together with Mr Comiskey are working towards developing a number of chain alliance projects for future implementation.

Best Practice process identified and articulated into report form

Apart from the articles presented in the 'Vegetable News' (see Appendix I) and the 'Growing for Profit' booklet (appropriate pages attached as Appendix J), no formal reports have been made available for this evaluation.

The lack of reporting is seen as a concern and should be addressed by the IDO.

Case Studies of Best Practice developed and reports disseminated to industry

A Best Practice can be described as a technique or methodology that, through experience and research, has proven to reliably lead to a desired result. A Best Practice tends to spread throughout an industry after success has been demonstrated. Major barriers to the adoption of a Best Practice include a lack of knowledge about the current Best Practices, a lack of motivation to make the changes and/or a lack of knowledge and skills required to do so (Ronan & Cleary, 2000).

Apart from the QFVG publications, the outcomes of some studies are disseminated through presentations to producer groups and one-on-one meetings with growers. Mr Comiskey advises that some projects are commercially in confidence for the time being.

One of the major criteria for assessment of the success of the Best Practice studies is the adoption of Best Practice methods and processes by the industry. It is vital that the outcomes of each study are disseminated to industry participants for facilitation of this process. It is outside the scope of this evaluation to conduct an industry survey of this activity, however it is recommended that future evaluations of the VIDS Project do so.

Case Studies of best practice have industry-wide application

Table 5 presented for Activity 2.1.4 provides an assessment of the case studies and projects against the needs identified by the Northern Australian Vegetable Industry. The dissemination of the Best Practice methods and processes is vital to the success of this activity.

Output 2.2

Case Studies of Best Practice for the Northern Australian vegetable industry developed from Best Practice studies.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Case studies maintained and progress reports disseminated to industry.• Case studies have industry-wide relevance and benefit.	<ul style="list-style-type: none">• Project reports.• Project reports and needs assessment.	<ul style="list-style-type: none">• High maintenance activity and groups will be widely dispersed.• May be seen as benefit to minority of 'big-business' growers.

Case Studies maintained and progress reports disseminated to industry

The input into the case studies by Mr Comiskey is briefly described in Table 7 of Appendix H. Each study requires varying level of input by Mr Comiskey. To date only three studies have been reported in industry publications: Kool Country Packers; Gympie Packhouse Redevelopment; and South Burnett Small Crop Growers Alliance. These three projects feature in the May issue of 'Vegetable News' (see Appendix I)

and in the ‘Growing for Profit’ booklet (see Appendix J). The articles present the case studies in general terms, however specific details regarding the processes that reflect ‘Best Practice’ are not clearly defined. To develop industry ‘Best Practices’ the outcomes of the Best Practice studies must be accessible to all industry participants.

Mr Comiskey advises that some projects remain commercially in-confidence. This is seen as an impediment to the process. However due to the highly competitive nature of the vegetable industry, this is not surprising. Strategies to overcome this problem should be addressed by the VIDS Project management and funding organisations.

Case studies have industry-wide relevance and benefit

The cross-referencing of the projects with the identified needs (see Table 5) shows that the projects developed are in response to Industry identified needs.

Activity 2.3.1 (towards Output 2.3)

Identify the services or activities required by producers to enhance their business capabilities.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Services and activities developed in response to business needs assessment. Services and activities are available to all industry participants regardless of location. Positive response from industry to 	<ul style="list-style-type: none"> Evaluation of services and activities against needs assessment. Evaluation of availability of services and activities. Feedback from industry 	<ul style="list-style-type: none"> Cost of providing activities and services throughout the Northern Australian region may limit scope of these services.

the services and activities provided.		
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Services and activities developed in response to business needs assessment

The services and activities provided by the VIDS project and corresponding identified industry needs are listed below in Table 8.

Table 8. Services provided by the VIDS Project in response to industry needs

Activity or Service	Examples of Industry needs from Needs List
a) Future Focus (A program to assist growers to develop informed decision-making skills)	Business and Market Development Service
b) Working in Groups (Program to assist growers to work together as groups)	Grower unity Alliances
c) Marketing and Business Development Service*	Business and Market Development Service Market research to identify new markets New product development Niche markets Market research – case studies
d) Web-based Information Database	There were several production specific needs which could be met through information provided by this service
e) Changing Face of Horticulture presentations	This activity is designed to introduce industry participants to the Business and Market Development Service, Best Practice studies and funding opportunities, all identified as industry needs.
f) Regional Information workshops	This activity was essential for the development of the Needs List.

* supplementary funding provided by QFVG.

- a) Future Focus is a program delivered by Mr David Milstein, a private consultant contracted to deliver the program on an as needs basis. To date the program has been conducted in the Sunshine Coast, Bundaberg, Bowen, Gumlu, Burdekin, Atherton Tableland and Mareeba regions.
- b) Working in Groups is also a program delivered by Mr David Milstein and is delivered on an as needs basis. To date the program has been conducted in the Lockyer and Gympie regions.
- c) The Marketing and Business Development Service has been discussed in detail under Activities connected with Output 2.1.
- d) The Web-based Information Database will be discussed in detail under Activity 3.1.4.
- e) The Changing Face of Horticulture presentations will be discussed in detail under Activity 3.1.3. To date the presentations have been conducted in the Granite Belt, Fassifern, Lockyer, Sunshine Coast, Gympie, Bundaberg,

Gumlu and Burdekin regions. The series has not been completed, with the Northern Territory and Northern NSW yet to be delivered.

- f) The Regional Information Workshops have been discussed in detail under Activity 1.1.1. The second round of workshops is yet to be completed.

Services and activities are available to all industry participants regardless of location

The services and activities described above are available to all industry participants. The choice of locations for the delivery of specific activities is to facilitate the inclusion of as many participants as possible. It is outside the scope of this evaluation to assess whether some industry participants are unable to attend the activities and access service due to being disadvantaged by distance as an industry survey was not conducted.

Positive response from industry to the services and activities provided

The Regional Industry Information Workshops were the only activity where evaluations were made available for this evaluation. The evaluations for that activity are detailed under Activity 1.1.1. The general lack of evaluation of activities is seen as a concern and should be addressed by the VIDS Project team.

Activity 2.3.2 (towards Output 2.3)

IDO to provide assistance to industry participants to form of Chain Alliances.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• IDOs actively promoting the benefits of Chain Alliances.• Chain Alliances formed	<ul style="list-style-type: none">• Media reports• Workshop materials• Record of inquiries• VIDS reports	<ul style="list-style-type: none">•

IDO to actively promoting the benefits of Chain Alliances

Mr Comiskey details the methods employed to promote Chain Alliances as:

- Publication of articles in the ‘Vegetable News’, ‘Queensland Fruit and Vegetable News’ and ‘Good Fruit and Vegetables’.
- One-on-one meetings with growers by IDOs and VIDS Project Manager, associated service providers eg. Department of State Development, DPI, AFFA and other state organisations.
- Presentations to local producer associations eg. Bundaberg Fruit and Vegetable Growers Association, Bowen and District Fruit and Vegetable Growers.
- Changing Face of Horticulture presentations introduces the services available to growers.
- Industry events eg. Growing for Profit presentations, Bundaberg Expo.

The methods detailed by Mr Comiskey used to promote this process appear comprehensive and adequate.

Chain Alliances Formed

13 of the 24 Alliance projects have been identified as Chain Alliances and are detailed below in Table 9.

Table 9. Chain Alliance Projects

Region	Project Name and Number	Brief Description of Alliance
Granite Belt, Lockyer	3. Wombok to Japan	Alliance between producers, export agent and overseas processor.
Fassifern	4. West Farms Grower Network	Alliance between producers and retailers.
	5. Fassifern Packers Business Applications	Alliance between producers, packers, input suppliers and retailers.
Lockyer, Gympie and NQ	7. Bean Prepackaging Research Alliance	Alliance between producers and retailers
Lockyer, NQ	8. East Coast Bean Alliance	Alliance between producers and retailers.
Lockyer	10. Beetroot Alliance	Alliance between producers and processor.
	11. Eco Foods	Alliance between producer and retailer.
	12. Lockyer Valley Export Group Alliance Development	Alliance between producers and exporters.
Gympie	18. Gympie Packhouse	Alliance between packhouse,

	Marketing Development	retailers and associated businesses.
Bundaberg	20. South Burnett Small Crop Growers Alliance	Alliance between producers, packers and associated businesses.
North Qld	23. Gumlu Producers Alliance	Alliance between producers and marketers.
Brisbane Metro	28. Asian Vegetables Product Development	Alliance between producers and marketers.
Qld wide	31. Australian Bean Producers Alliance	Alliance between producers and retailers.

Output 2.3

Provision of additional services to enhance the business capability of producer groups within the Northern Australian Vegetable Industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Services designed to benefit the whole Northern Australian Vegetable Industry. 	<ul style="list-style-type: none"> VIDS Project reports 	Some growers see themselves as too geographically isolated to take advantage of services.

Services designed to benefit the whole Northern Australian Vegetable Industry

To services and activities designed by the VIDS Project are detailed in Table 8 under Activity 2.3.1. These services and activities are available to all participants of the Northern Australian Vegetable Industry.

Activity 2.4.1 (towards Output 2.4)

Design and facilitate regional workshops ‘The Changing Face of Horticulture’ that will specifically address marketing and business issues beyond the farm gate and encourage industry collaboration in project development.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Workshops 	<ul style="list-style-type: none"> Workshop attendance 	<ul style="list-style-type: none"> Timing of workshops

<p>attended by industry participants in all major production areas of Northern Australia.</p> <ul style="list-style-type: none"> • Workshop content designed to suit each region. • Positive response from attendees. • Workshops completed by October 2000. • Attendance at follow-up activities and requests for assistance. <p>Collaborative industry project proposals written.</p>	<p>records.</p> <ul style="list-style-type: none"> • Workshop notes and feedback sheets. • Workshop feedback sheets. • Workshop reports. • Attendance record for activities • Record of inquiries. • Project proposals 	<p>may not suit all industry participants.</p> <ul style="list-style-type: none"> • Reluctance by growers to attend such activities. • Central location of workshop to facilitate attendance. • Attendees willing to respond to feedback sheets. • The number of requests for assistance has caused difficulty in fulfilling all requests. • Growers unwilling to contribute in some group situations.
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Workshops attended by industry participants in all major production areas

Mr Comiskey has designed and delivered the workshops in the areas listed below in Table 10.

Table 10. 'The Changing Face of Horticulture' Workshops

Region	Attendance	Date
North Qld (Gumlu)	12	13 December 1999
North Qld (Bowen)	12	16 December 1999
North Qld (Gumlu)	12	February 2000
Burdekin (Ayr)	10	February 2000
North Qld (Bowen)	18	February 2000
Gympie	30	26 June 2000

Fassifern	14	21 August 2000
Lockyer	46	24 August 2000
Bundaberg	12	6 September 2000
Granite Belt	11	12 October 2000
Northern NSW	11	17 October 2000
Sunshine Coast	10	30 October 2000
Mackay	15	7 May 2000

As Table 10 shows, additional workshops were conducted at Gumlu and Bowen. The requests for the additional workshops were due to the inability of some growers to attend the earlier function. Mr Comiskey advises that workshops are to be conducted in Far North Queensland (Atherton Tableland and Mareeba) and the Northern Territory (Katherine and Darwin). He anticipates that these workshops will be conducted by August 2001. A workshop was not conducted in the Darling Downs region due to the small number of industry participants; however, one-on-one meetings with growers were conducted.

Workshop content designed to suit each region

The ‘power-point’ presentation from the Lockyer workshop was viewed for this evaluation. The presentation comprised the following topics:

- Introduction to the VIDS Project
- Changes to the market due to increased international competition
- The future role of retailers and producers
- The challenge for Queensland producers
- The importance of the formation of alliances
- Case examples of successful Alliances
- Outline of VIDS Program projects
- Discussion of issues raised by the group

Whilst no area-specific detail was provided in the hard copy material viewed, it should be acknowledged that Mr Comiskey has developed a good working knowledge of each production area through field visits and one-on-one meetings with growers in each region. Mr Comiskey was therefore able to elaborate on particular points of the presentation with area-specific details.

Positive response from attendees

Evaluations were not conducted for any of the workshops. This is an area that requires attention by the IDO for future monitoring and evaluation purposes. Whilst no formal evaluation of the workshops have been conducted, Mr Comiskey advises that the verbal response he received, the number of projects that have been developed from interaction with participants at these functions and attendance at follow-up activities indicates a positive response.

Workshops completed by October 2000

Mr Comiskey anticipates that the series will be completed by August 2001.

Attendance at follow-up activities and requests for assistance

Mr Comiskey advises that a number of follow-up activities have been conducted in each region.

Collaborative industry project proposal written

To date Mr Comiskey has been involved in writing 18 project proposals for submission to various funding bodies with 13 successful outcomes to date. 33 projects have been developed or are in the process of development as a direct result of this activity. Funding for projects developed under the VIDS Project currently stands at \$505,080.

Activity 2.4.2 (towards Output 2.4)

IDO's facilitating networking among industry participants.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> IDO's act on inquiries and provide contacts for specific information, services and project collaboration. 	<ul style="list-style-type: none"> Record of inquiries and actions taken 	<ul style="list-style-type: none"> Not all inquiries are recorded due to time and location when enquiries are received.

The range of enquiries and actions taken by Ms Heritage include:

<u>Inquiry</u>	<u>Action</u>
Information and contacts regarding vegetable R & D and other projects.	Provide newsletters, updates, inform them where to access the information, or find the information and send it out.
General Industry inquiries (eg. Who do I contact to get barcodes on my produce?)	Find out and let them know.
Vegetable diseases, pests and other agronomy issues.	Refer to the DPI or QFVG Pest Management Officer and send on any information on hand.
Market information	Refer them to the appropriate person.
Industry/Business contacts for supply of produce.	Refer them to the appropriate person, send out a market enquiry form, contact growers in some cases.
Chemical issues	Refer to the Pest Management Officer at QFVG.
Feedback on proposals.	Provide information where possible.

Mr Comiskey supplied the following as the range of enquiries he deals with:

- Contact information for other supply chain participants ie. wholesalers, processors.
- Requests for agronomic advice and assistance
- Requests for assistance regarding the completion of funding applications.
- Referrals to service providers

- Provision of services, information or access to sources of same eg. Wage, WPH &S enquiries.
- Ongoing communication with participants in the various collaborative projects developed under the VIDS Project.

Output 2.4

Increased awareness of industry participants of the issues relating to marketing and business opportunities in the Northern Australian Vegetable Industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • Increase in the number of enquiries • Increased attendance at follow-up activities. 	<ul style="list-style-type: none"> • Record of enquiries • Attendance records of follow-up activities. 	

Increase in the number of enquiries

Both IDOs have noticed an increase in the number of enquiries directed to them as a result of direct involvement with industry members due the IDOs facilitating workshops and other activities associated with the VIDS Project. Activity 2.4.2 provides details of range of enquiries handled by each IDO.

Increased attendance at follow-up activities

As the follow-up activities have not been completed (Round 2 Information workshops), this criterion cannot be assessed in this evaluation.

Summary and Comments for Objective 2

To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> • Projects developed in response to needs assessment. • Securing external 	<ul style="list-style-type: none"> • Evaluation of projects against needs assessment. 	<ul style="list-style-type: none"> • Adequate funding available for projects in identified areas. • Growers are unaware of

<p>funding for development and implementation of identified projects.</p> <ul style="list-style-type: none"> VIDS Project team assisting the development of projects in collaboration with industry participants. Best Practice studies established in each of the major production regions of Northern Australia. Increase in the number of industry participants accessing the services and attending activities provided by the VIDS Project. 	<ul style="list-style-type: none"> Proposal feedback from funding bodies. Project proposals and reports. VIDS Project reports. VIDS Project reports. 	<p>funding resources.</p> <ul style="list-style-type: none"> Low level of collaboration between industry participants. Low levels of trust and awareness of process among group members. Slow adoption of new ideas by industry. High maintenance input needed by co-ordinator. Industry participants have less time to participate in activities.
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Projects developed in response to needs assessment

Activities under Output 2.1 designed to meet this criterion include: IDOs participating in National Vegetable R&D activities (Activity 2.1.1); dissemination of needs and economic analysis reports to industry (Activity 2.1.2); the conduct of an R&D workshop with industry researchers (Activity 2.1.3); and IDO providing assistance to industry participants to develop projects (Activity 2.1.4).

33 project plans have been developed (Output 2.1) in collaboration with Industry participants (see Appendix H for details). Of the total, three projects were not implemented for reasons provided under Activity 2.1.4.

Table 5 under Activity 2.1.4 details the projects according to the needs identified from the Information Workshop series. It is considered that the projects have been designed in response to Industry needs.

Securing external funding for development and implementation of identified projects

The provision of an application writing service to assist industry participants to develop project applications and obtain funding for projects was Activity 2.1.5 under Output 2.1 and designed to meet this criterion.

13 projects to date, have received funding from various organisations for a total \$505,080. Eight proposals are waiting for funding approval or are in the process of being developed for submission to funding bodies (two of the eight, have received partial funding). A summary of all projects and their status is presented in various tables provided at Appendix H.

11 projects are being implemented without funding assistance. These projects either did not suit funding guidelines or require funding. In some cases the participants did not wish to apply for funding.

VIDS Project team assisting the development of projects in collaboration with industry participants

The process for developing projects with assistance from the VIDS Project team is well explained in various publications including the March issue of the 'Vegetable News' (see Appendix I).

The main impetus for the development of projects is provided by the facilitation of the workshop series 'The Changing Face of Horticulture' (Activity 2.4.1). This activity was designed to meet the criteria for Output 2.4 (Increased awareness of industry participants of the issues relating to marketing and business opportunities).

Best practice studies established in each of the major production regions of Northern Australia

'Best Practice' means different things to different people. Two key aspects of best practice studies in agriculture are one which focuses on excellence in profitable commodity production and the other which focuses on profitable deployment of human capital resources into both farm and off-farm endeavour (Ronan and Cleary, 2000).

Output 2.2 and associated activities have been designed to meet this criterion. To date 21 of the 30 implemented or developing projects can be described as Best Practice Studies (see Table 7 of this report and Table 7 of Appendix H).

Regions where Best Practice studies have been developed are: Granite Belt, Fassifern, Lockyer, Sunshine Coast, Gympie, Bundaberg, North Queensland, Far North Queensland and Brisbane Metro. All Queensland bean producing areas have been included in the developing project 'Australian Bean Producers Alliance'.

No projects are currently being implemented in the marginal VIDS Project areas of the Northern Territory or Northern NSW. Mr Comiskey did attempt to implement a project in Northern NSW, however the project did not proceed due to lack of interest from producers once the plan was developed. Mr Comiskey is due to go the Northern Territory in July to facilitate two 'The Changing Face of Horticulture' workshops, with which he hopes to generate interest in developing Industry projects.

Increase in the number of industry participants accessing the services and attending activities provided by the VIDS Project

Activity 2.3.1 (Identify services or activities required by producers to enhance their business capabilities) was designed to achieve this criterion. Table 8 under Activity 2.3.1 lists the services currently available or in the process of development, that are available to Industry participants. The table also provides corresponding needs as identified by the 'Northern Australia Vegetable Industry Needs 2000' Report (see Appendix E).

The services and activities are provided by the VIDS Project team or by contracted specialist consultants.

From viewing the participant lists from the Information Workshop series and 'The Changing Face of Horticulture' the activities appear to be well attended, however without the provision of a complete database of vegetable industry participants, no comment can be made regarding percentages etc., of participants accessing these services.

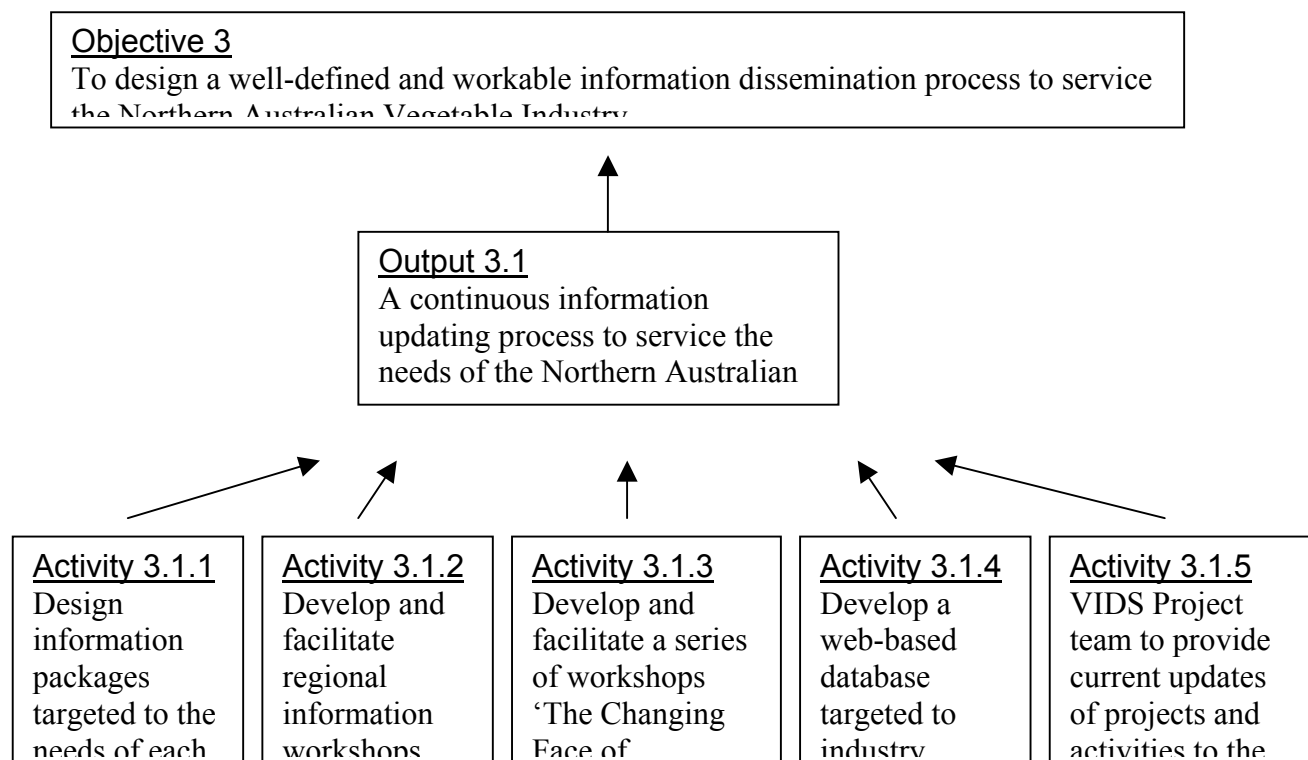
Points to note arising from the evaluation of the activities under Objective 2 include:

- The lack of activities and projects in the marginal regions of the VIDS Project area.
- One of the major criteria for the assessment of the success of Best Practice studies is the adoption of the identified Best Practice methods or processes. It is therefore vital that the outcomes of each study be disseminated to industry participants to facilitate this process. Mr Comiskey advises that some projects remain commercially in-confidence which is deemed to conflict with the aim of this Objective. The knowledge gained by industry participants through the implementation and reporting of the project outcomes should be an assessment criterion for future evaluations of the VIDS Project.
- An industry assessment of the services provided by the VIDS Project should be an assessment criterion for future evaluations of the VIDS Project.
- The lack of evaluation of project development activities is of concern and should be addressed by the VIDS Project team.
- No progress reports for any projects were made available for this evaluation. The lack of reporting is seen as a concern and should be addressed by the VIDS Project team.

Objective 3

To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.

The process of how the outputs and activities developed by the VIDS Project team will contribute to the achievement of Objective 3 is illustrated diagrammatically below:



Activity 3.1.1 (towards Output 3.1)

Design information packages targeted to the needs of each production area

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Information provided in packages directly relates to the needs of industry 	<ul style="list-style-type: none"> Content evaluated against needs assessment. 	<ul style="list-style-type: none"> High cost of production of hard copies and dissemination to industry participants

<p>participants in each production area.</p> <ul style="list-style-type: none"> • Information presented in a useable form for industry participants. • Quality of information presented in packages. • Positive response from industry 	<ul style="list-style-type: none"> • Feedback from industry • Evaluation of the currency of information and sources used. • Feedback from industry 	<ul style="list-style-type: none"> • Industry participants receive so much information already. • Growers have little time to read and evaluate information. • Growers prefer to receive one-on-one advice rather than reading reports.
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Information packages

Information packages were presented at each Vegetable Industry Needs workshop. The packages at the first round of the workshop contained information directly related to the crops grown in the region. Information packages were also distributed at the follow-up workshops and one-on-one farm visits (these activities are yet to be completed). The package designed for the Sunshine Coast region was viewed. The package comprised a brief report of the region's 1999 needs list with service and information sources identified to address these needs. Other information provided included:

- Lists of HRDC funded vegetable research projects
- Project briefs for the 'Vegetable Cool Chain Management' project and the 'Insect Pest Management in Sweet Corn' project
- QFVG news release regarding farm labour
- Various brochures for Grow Search, QFVG Future Focus program, Farmsafe Australia, DPI Client Information Services, Freshcare, DPI Quality Management for fruit and vegetable growers.

The information presented was current, relevant to the region and well presented.

Ms Heritage advised that the information packages were well received by the participants in these activities. The inclusion of the list of projects in the information packages generated a total of approximately 30 requests from workshop participants for further information in relation to specific projects.

Activity 3.1.2 (towards Output 3.1)

Develop and facilitate regional information workshops

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Workshops attended by Northern Australia Vegetable Industry participants.• Workshop content designed to suit each region.• Positive response from attendees.• Workshops completed by July 2001.	<ul style="list-style-type: none">• Workshop attendance records.• Workshop notes and feedback sheets.• Workshop feedback sheets.• Workshop reports.	<ul style="list-style-type: none">• Industry participants have time to attend workshops.• Attendees are willing to fill out feedback sheets

Workshops

These workshops were conducted as Round 2 and follow-up to the 1999 round of 'Vegetable Industry Needs' workshops (Activity 1.1.1). This series of workshops are yet to be completed. To date these follow-up workshops have been held in six regions (Fassifern Valley, Lockyer Valley, Granite Belt, Northern NSW, Sunshine Coast and Bundaberg). Follow-up with Brisbane Metropolitan and Darling Downs was performed through the conduct of on-farm interviews with individual growers. This was due to the low number of active growers in the area and anticipated lack of attendance if a meeting was to be held. The purpose of these activities was to present information packages designed to address each production area's needs that were

identified in the first series of workshops, to discuss further needs and action required. The information packages are discussed in Activity 3.1.1.

Table 11. Round 2 Information Workshop Attendance

<u>Workshop Centre</u>	<u>Date</u>	<u>No. Participants</u>
Brisbane Metropolitan	One-on-one visits	13 (12 growers)
Darling Downs	One-on-one visits	7 (7 growers)
Bundaberg	5 February 2000	14 (10 growers)
Fassifern Valley	14 June 2000	15 (10 growers)
Granite Belt	28 March 2000	10 (8 growers)
Lockyer Valley	13 June 2000	17 (11 growers)
Northern NSW	30 March 2000	13 (8 growers)
Sunshine Coast	29 September 1999	7 (5 growers)

Feedback sheets

The feedback sheets from these activities indicate a positive response to the workshops. An example of the feedback sheets used for these workshops is included as Appendix K.

Due to a number of reasons the workshop series has not been completed and it is doubtful whether the series will be completed by the due date. However, due to the positive response to the activities carried out to date, it is recommended that the series be implemented in all other regions.

Activity 3.1.3 (towards Output 3.1)

Develop and facilitate a series of information evenings 'The Changing Face of Horticulture' specifically addressing marketing and business beyond the farm gate which effects long term business viability

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Workshops attended by Northern Australian Vegetable Industry participants. Workshop content designed to suit each region. Positive response from attendees. Workshops completed by October 2000. 	<ul style="list-style-type: none"> Workshop attendance records. Workshop notes and feedback sheets. Workshop feedback sheets. Workshop reports. 	<ul style="list-style-type: none"> Industry participants have time to attend workshops. Growers recognise themselves as business entities. Attendees are willing to fill out feedback sheets

'The Changing Face of Horticulture' workshops have been discussed in detail under Activity 2.4.1.

Activity 3.1.4 (towards Output 3.1)

Develop a web-based information database targeted to the needs of Northern Australian vegetable industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none"> Database completed by June 30 2001. Vegetable industry access the database. Positive response to database from industry regarding content, use and accessibility. 	<ul style="list-style-type: none"> Database active Record of enquiry and website records. Industry feedback from web form Feedback from contact with industry. 	<ul style="list-style-type: none"> Information provided is relevant and useful. Not all industry participants have access to web. Computer literacy is low among industry participants.

Due to a number of logistical factors, the delivery of the database is behind schedule. The advice from Ms Heritage to date is that the database design is 75 percent complete. The expected date for the database design and upload of information is July 31 2001 (for trial) and fully operational through the QFVG website by October 31 2001. The information to be uploaded is being provided by GrowSearch, the Centre for Food Technology and IDOs.

Activity 3.1.5 (towards Output 3.1)

VIDS Project team providing current information of projects and activities to the various reporting services available.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">• Updates provided by IDOs for the various VIDS Project activities.• VIDS Project activities published in available media (Vegetable News, Fruit and Vegetable News Queensland, Good Fruit and Vegetables Magazine, QFVG Website).	<ul style="list-style-type: none">• Reports• Published material	<ul style="list-style-type: none">• Time constraints limit the ability of IDOs to write articles

Updates

Both IDOs provide regular written reports outlining their activities in relation to the VIDS Project and vegetable program. These reports entitled 'IDO Update – Northern Australia' are presented on the vegetable pages of the QFVG website and are distributed to the grower representatives on the QFVG Vegetable Committee, Horticulture Australia, AUSVEG, IDOs nationally, Northern Territory project team and other key stakeholders.

Publication of VIDS Project activities

- ‘Vegetable News’ is included as an insert of the QFVG’s monthly publication ‘Fruit and Vegetable News Queensland’. Issues of ‘Vegetable News’ are printed on a regular basis, with 9 issues published between July 1999 and February 2001. ‘Fruit and Vegetable News Queensland’ is distributed to all Queensland growers and interstate subscribers including Northern NSW and NT growers.

For this evaluation six issues of ‘Vegetable News’ were viewed. It appears to be a very well produced publication with colour photographs and appealing layout.

The two IDOs make regular contributions to the publication with reports on workshops and activities. Services including GrowSearch, Future Profit and others are also profiled. In Issue 5 March 2000 a list of RIRDC and HRDC funded vegetable projects was included. Ms Heritage said that over thirty requests were received for further information regarding the projects listed in the March issue. A copy is included as Appendix L.

- ‘Good Fruit and Vegetables’ is a monthly magazine that is distributed to industry participants nationally on a subscription basis. It is estimated by the IDOs that over 50 percent of producers in Northern Australia received this publication. The IDOs regularly contribute to a magazine column entitled ‘The Vegetable Platter’ with reports about activities and information sources.
- The QFVG website (<http://www.qfvg.org.au>) has a specific vegetable site. The vegetable site has been in operation since April 2001 and contains extensive information regarding the VIDS project. The VIDS project details available at the site include:
 - VIDS project goal
 - Main project activities
 - Northern Territory
 - IDO updates
 - Vegetable project development workshop
 - Industry needs and issues
 - Project milestones

The site is designed very well with the information presented in an easy to read format.

Output 3.1

A continuous information updating process to service the needs of the Northern Australian Vegetable Industry participants.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">Information is disseminated to industry on a continual basis.	<ul style="list-style-type: none">Record of information sent.Record of information provided in the field.	Not all information disseminated will have industry-wide relevance.

Information packages (Activity 3.1.1) are distributed at regional workshops (3.1.2 and (3.1.3). The web-based information database (Activity 3.1.4) will be regularly updated by GrowSearch, the Centre for Food Technology and IDOs. Activity 3.1.5 provides details of how the IDOs provide regular updates of activities and projects to the various industry publications and the QFVG website.

Summary and Comments for Objective 3

To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.

Verifiable Indicators	Means of Verification	Comments/Assumptions
<ul style="list-style-type: none">Increase in the number of industry participants accessing information services provided by the VIDS	<ul style="list-style-type: none">Records of web site and phone calls received.	<ul style="list-style-type: none">Low level of technology adoption among growers.Information is presented in a useable form for industry participants.

Project. <ul style="list-style-type: none">• Information available adequately addresses the needs of industry participants.	<ul style="list-style-type: none">• Evaluation of information provided against needs assessment.	
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Increase in the number of industry participants accessing information services provided by the project

The VIDS Project has introduced a number of initiatives to assist the process of information dissemination to industry participants including:

- Regular input into the ‘Vegetable News’ inserts in the QFVG publication ‘Fruit and Vegetable News Queensland’, the nationally distributed ‘Good Fruit and Vegetables’ magazine and the QFVG website.
- Development of information packages for participants in regional workshops and other events of interest to the vegetable industry.
- Development of a web-based information database.

The web-based information database is not yet operational. Advice from Ms Heritage is that the database will be ready by July 31 for trial and available through the QFVG website by October 31 2001. Through contact with industry through the various regional workshops and activities, the number of telephone enquiries and request for additional information has increased. An example is the response to the inclusion of the list of HRDC and RIRDC funded projects in the information packages and the ‘Vegetable News’ insert. Ms Heritage recorded over 50 requests for further information from the ‘Vegetable News’ published list and 30 requests from list provided in the information packages.

Information available adequately addresses the needs of industry participants

The information packages are discussed under Activity 3.1.1 The information provided in each package is a collation of information available that addresses the needs identified in each region.

The DPI’s GrowSearch information service and the Centre for Food Technology are working with the VIDS Project team to collate the information for the web-

based information database. The information on the database will be cross-referenced to the industry needs list as identified under Objective 1.

5.0 CONCLUSION AND RECOMMENDATIONS

The VIDS Project Goal is defined as:

To facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable producers enabling access to the required resources for improved industry performance.

The VIDS Project team, comprising a Project Manager (Mr Noel Harvey), and two Industry Development Officers (Ms Samantha Heritage and Mr Shane Comiskey) developed three objectives with a several outputs and activities designed to meet the objectives. The purpose of this evaluation has been to assess how the outputs and activities are meeting the stated objectives.

Objective 1

To determine the Northern Australian Vegetable Industry's information and technological needs.

Data gathering for the Industry needs analysis has been completed and is in the process of being validated through the facilitation of a second round of industry workshops. Several reports arising from the activities have been written and have been presented to key stakeholder groups.

The economic analysis of the Northern Australian Vegetable Industry remains outstanding. The VIDS Project Manager advises that an economist has been contracted to perform the analysis with September as the anticipated date of completion. This economic analysis is deemed necessary to provide validation and direction for the development of industry projects.

Objective 2

To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.

Several outputs and activities were designed to meet this objective. Mr Shane Comiskey is the IDO responsible for the delivery of this area of the project. To date, \$505,080 funding for projects has been obtained from the various funding bodies for the implementation of 13 projects. Eight project proposals are in the process of being developed or are waiting for funding approval (two of the eight have already received partial funding). The major project areas are business planning, research (production and prepackaging), and several alliances (export, retail, business operations, processing, marketing, QA and general grower alliances).

Industry participants from the marginal regions of the VIDS Project area (Northern Territory and Northern NSW) are currently not involved in any collaborative industry projects developed under the VIDS Project. A project plan for a Sweet Potato Producers Alliance was developed for Northern NSW producers, but did not proceed due to lack of interest from the producers. Mr Comiskey is due to facilitate two workshops in the Northern Territory in July through which he hopes to stimulate project involvement. The incorporation of these marginal areas is a concern for the VIDS Project.

Several projects have been described as Best Practice studies. The description 'Best Practice' can only be achieved once the identified practice or process has been adopted by industry participants and proven to result in increased or improved performance. It is therefore essential, that the results from these studies be disseminated to industry participants. Advice from Mr Comiskey is that some studies are commercially in-confidence. Whilst it is acknowledged that the vegetable industry is a highly competitive industry, the lack of reporting results and progress reports appears to be in conflict with the desired aim of Objective 2.

A number of additional services and activities have been identified by the VIDS Project. Private consultant Mr David Milstein has been contracted to deliver two programs (Future Focus and Working in Groups). Future Focus is aimed at improving producers' business decision making skills and has been delivered in several regions to date. Working in Groups has been delivered to participants from one region and is designed to improve members' group participation skills.

Assessment of the increased awareness of industry participants of the issues relating to marketing and business opportunities has been restricted to examining the methods used by the IDOs to achieve this aim. The methods used appear to incorporate all Northern Australian Vegetable Industry participants in some form, whether through direct contact or industry publications. Direct responses from industry would be necessary to fully assess the success of this criterion. Feedback sheets from participants should also be provided for all activities provided by the VIDS Project. Only the Information workshops provided such data.

It was noted that the documentation provided by the team (media articles, presentation slides etc.) was not clearly identified as originating from the Vegetable Industry Development Service Project (VIDS Project). The material used for presentations at the activities appeared to be Queensland focussed, rather than Northern Australia, which further marginalises the outer regions of the Northern Territory and Northern NSW.

Objective 3

To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.

The VIDS Project team has introduced a number of initiatives to assist the process of information dissemination to industry participants including: regular input into the various industry publications; development of information packages for participants in regional workshops and other industry related events; and the development of a web-based information database.

The web-based information database is not yet operational. Advice from Ms Heritage is that the database will be available through the QFVG website by October 31 2001. The DPI's GrowSearch information service and the Centre for Food Technology are working with the VIDS Project team to collate the information for the database. The outputs and activities developed to achieve Objective 3 appear to meet the criteria. However, to fully assess whether the objective has been achieved, direct response from industry will be necessary.

Recommendations

1. This evaluation primarily focuses on the physical make-up of the VIDS Project's outputs from the aspect of the provision of services and activities. The ultimate success of this highly participatory project will depend on the impact that implementation of the project has on the producers themselves. For an adequate evaluation of increased knowledge and awareness; reactions and practice change, a more extensive evaluation is necessary, involving direct responses from the industry participants.
2. Output 1.2, the economic analysis of the Northern Australian Vegetable Industry has not been conducted. It is recommended that this be completed as soon as practical to provide validation and direction for the development of industry projects.
3. The marginal regions of the Northern Australian Vegetable Industry – the Northern Territory and Northern NSW require appear to be less serviced by the VIDS Project than the Queensland regions. This is evidenced by the lack of activities and services provided to the regions and lack of developing projects. It is recommended that more attention be given to these areas.
4. While it is acknowledged that area-specific detail is necessary for regional workshop presentations, and indeed there may be clear differences in the regions, the use of the term 'Northern Australia' rather than 'Queensland' should be used for general material.
5. There is a lack of clear identification or ownership of the services and activities provided under the VIDS Project. It is recommended that the services and activities provided under the VIDS Project should be clearly identified as such.
6. All activities involving industry participants should be evaluated to provide ongoing monitoring of the activities for improvement of delivery and further identification of industry needs.

7. Reports from VIDS Project case studies should be disseminated to industry participants to assist the up-take of improved processes and practices and provide an impetus for improved industry performance.

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Ronan, G. & G. Cleary (2000), 'Best practice benchmarking in Australian agriculture: issues and challenges', *Agribusiness Perspectives*, Paper 39 August 2000.

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APPENDIX A
VIDS Project Logical Framework Matrix

Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>BROADER GOAL To enhance the capability of Northern Australian vegetable producers through improved communication, delivery of programs and collaboration within an industry that is profitable, sustainable and market driven.</p>	<ul style="list-style-type: none"> • Australian Vegetable Industry participation in a collaborative network program • Increase in grower membership of State Vegetable Growers' Association. • Increased domestic consumption of Australian vegetables • Increased export sales of vegetables. • Australian Vegetable Industry meeting at least minimum Quality Assurance standards that satisfy consumer demands for quality and 	<ul style="list-style-type: none"> • AUSVEG Network Program reports detailing level of industry participation. • State Grower Association membership records • ABARE statistics • ABARE statistics • Industry Quality Assurance standards 	<ul style="list-style-type: none"> • Industry widely dispersed • Industry members have very little time for networking. • Low levels of trust and funding creates a competitive rather than collaborative environment. • Members are committed to the organisation and recognise the benefits of belonging. • Lack of industry cohesion in marketing. • Lack of collaboration for export and export effort is fragmented • Quality not viewed as consistently the same as global competitors. • Lack of communication and trust between value

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	<p>traceability.</p> <ul style="list-style-type: none"> • Formation of regional. Interegional and interstate vegetable grower chain alliances. 	<ul style="list-style-type: none"> • State and National reports. 	<p>chain participants</p> <ul style="list-style-type: none"> • Power of purchasing groups. • There is a need to have increased profitability of the whole of the vegetable chain, not just producers even though they are the only ones paying the levies.
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VIDS Project Logical Framework Matrix

Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>PROJECT GOAL To facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable producers enabling access to the required resources for improved industry performance.</p>	<ul style="list-style-type: none"> • Projects developed by the VID Project meet the needs of the Northern Australian vegetable producers. • Projects developed by the VID Project are aimed at improving the capability of producers in on-farm and post-farm gate activities • Established information network to service the Northern Australian vegetable industry. • Increase in gross margins achieved by Northern Australian vegetable producers. 	<ul style="list-style-type: none"> • Projects and the industry needs assessment report. • Project reports • VID Project reports • ABARE and Industry statistics. 	<ul style="list-style-type: none"> • Producers and industry feel the need to participate.

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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
OBJECTIVES 1.0 To determine the Northern Australian Vegetable Industry's information and technological needs.	<ul style="list-style-type: none"> • Industry needs articulated • Industry validation of needs 	<ul style="list-style-type: none"> • Resulting reports – VIDS Project team • Reports disseminated to industry and feedback received. 	<ul style="list-style-type: none"> • Industry participation in needs analysis. • Adequate response from industry may be hard to achieve due to time and lack of responsiveness.
2.0 To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.	<ul style="list-style-type: none"> • Projects developed in response to needs assessment. • Securing external funding for development and implementation of identified projects. • VIDS Project team assisting the development of projects in collaboration with industry participants. • Best practice studies established in each of the major production regions of 	<ul style="list-style-type: none"> • Evaluation of projects against needs assessment. • Proposal feedback from funding bodies. • Project proposals and reports. • VIDS Project reports. 	<ul style="list-style-type: none"> • Adequate funding available for projects in identified areas. • Growers are unaware of funding resources. • Low level of collaboration between industry participants. • Low levels of trust and awareness of process among group members.

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	<p>Northern Australia.</p> <ul style="list-style-type: none"> • Increase in the number of industry participants accessing the services and attending activities provided by the VIDS Project. 	<ul style="list-style-type: none"> • VIDS Project reports. 	<ul style="list-style-type: none"> • Slow adoption of new ideas by industry. • High maintenance input needed by co-ordinator. • Industry participants have less time to participate in activities.
3.0 To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.	<ul style="list-style-type: none"> • Increase in the number of industry participants accessing information services provided by the VIDS Project. • Information available adequately addresses the needs of industry participants. 	<ul style="list-style-type: none"> • Records of web site and phone calls received. • Evaluation of information provided against needs assessment. 	<ul style="list-style-type: none"> • Low level of technology adoption among growers. • Information is presented in a useable form for industry participants.

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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>OBJECTIVE 1 OUTPUTS</p> <p>1.1 Needs analysis of the Northern Australia Vegetable Industry.</p> <p>1.2 Economic analysis of the Northern Australian Vegetable Industry.</p>	<ul style="list-style-type: none"> • Reports prepared identifying needs of the Northern Australian Vegetable Industry. • Validation of the needs by industry. • Report prepared describing the economic environment of the Northern Australian Vegetable Industry. 	<ul style="list-style-type: none"> • Workshop results and reports • Feedback from industry • Report 	<ul style="list-style-type: none"> • Industry participation in needs analysis • Growers' needs have not previously been well articulated

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<p>OBJECTIVE 1 ACTIVITIES</p> <p>1.1.1 Develop and facilitate regional industry workshops to gather data for needs analysis from the Northern Australia Vegetable Industry participants and prepare reports.</p>	<ul style="list-style-type: none"> • Workshops attended by industry participants, representative of the Northern Australian Vegetable Industry. • Positive response from industry towards the workshops • Round 1 Workshops completed by January 2000. • Round 2 Workshops completed by June 2001. • Reports prepared and disseminated to industry representatives. 	<ul style="list-style-type: none"> • Record of participants at workshops • Participant feedback sheets from workshops • Workshop reports • Workshop reports • VIDs reports and outward correspondence. 	<ul style="list-style-type: none"> • Large geographical areas • Seasonal production activities may limit workshop attendance. • Industry representatives willing to participate in workshops.
<p>1.1.2 IDOs conduct one on one farm interviews with Northern Australian vegetable producers.</p>	<ul style="list-style-type: none"> • Number and quality of on-farm interviews 	<ul style="list-style-type: none"> • Reports from interviews • Survey methodology elaborated. 	<ul style="list-style-type: none"> • Targets willing to be interviewed. • Growers may not contribute well in a group situation.
<p>1.2.1 Conduct an economic survey of the Northern Australia Vegetable Industry and prepare report .</p>	<ul style="list-style-type: none"> • Survey conducted by November 1999. 	<ul style="list-style-type: none"> • VIDS reports. 	

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	<ul style="list-style-type: none">• Report prepared by June 2000.		
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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>OBJECTIVE 2 OUTPUTS</p> <p>2.1 Projects developed in collaboration with industry participants to specifically address the Northern Australian Vegetable Industry needs.</p> <p>2.2 Case Studies of Best Practice for the Northern Australian Vegetable Industry developed from Best Practice studies.</p> <p>2.3 Provision of additional services to enhance the business capability of producer groups within the Northern Australian Vegetable</p>	<ul style="list-style-type: none"> • Project plans developed in all areas of the Northern Australian Vegetable Industry • Funding obtained for eligible projects. • Evaluation of proposals against needs assessment. • Case studies maintained and progress reports disseminated to industry. • Case studies have industry-wide relevance and benefit. • Services designed to benefit the whole Northern Australian Vegetable Industry. 	<ul style="list-style-type: none"> • Project plans • VIDS Reports • Project proposals • Feedback from funding organisations. • Project plans and needs assessment. • Project reports. • Project reports and needs assessment. • VIDS Project reports • Record of enquiries 	<ul style="list-style-type: none"> • Growers reluctant to get involved in projects • Funding available for projects. • Some growers are not willing to access the service. • Project may only target individual needs rather than industry needs. • High maintenance activity and groups will be widely dispersed. • May be seen as benefit to minority of 'big-business' growers. • Some growers see themselves as too geographically isolated to take advantage of services.

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<p>Industry.</p> <p>2.4 Increased awareness of industry participants of the issues relating to marketing and business opportunities in the Northern Australian Vegetable Industry.</p>	<ul style="list-style-type: none"> • Increase in the number of enquiries • Increased attendance at follow-up activities. 	<ul style="list-style-type: none"> • Attendance records of follow-up activities. 	
<p>OBJECTIVE 2 ACTIVITIES</p> <p>2.1.1 IDOs to participate in national vegetable research and development meetings, collate state and regional needs and provide input into the Australian Vegetable Industry Development Plan</p>	<ul style="list-style-type: none"> • IDOs participating in the national activities. • Number of national meetings attended by IDOs • National needs list developed. 	<ul style="list-style-type: none"> • IDO activity records • IDO activity records • Reports 	<ul style="list-style-type: none"> • Networking limited by geographical dispersion. • National meetings only held twice a year.
<p>2.1.2 Disseminate the Northern Australian Vegetable Industry needs report to the industry.</p>	<ul style="list-style-type: none"> • Report completed by March 2000. • Reports sent to workshop participants and relevant stakeholders in each production area. 	<ul style="list-style-type: none"> • Report • Records • Report 	<ul style="list-style-type: none"> • Participants in assessment are representative of the industry as a whole. • Cost of report production and mail-out may be prohibitive.

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	<ul style="list-style-type: none"> • Report presented in a useable form by industry. • Report adequately captures data obtained from workshops and interviews. 	<ul style="list-style-type: none"> • Evaluation of report against workshop reports and interview data. 	
2.1.3 Conduct a Research and Development workshop with industry researchers.	<ul style="list-style-type: none"> • Workshop conducted within six months from completing the first round of information workshops. • Workshop attended by key researchers from the vegetable industry. • Positive response to workshop from attendees. 	<ul style="list-style-type: none"> • Workshop report • Workshop attendance record • Response sheets from workshop. 	<ul style="list-style-type: none"> • Timing of workshop may not be suitable. • Researchers are responsive to workshop objectives. • There is adequate funding available for projects. • Most research is primarily focussed on on-farm production rather than post-harvest or business management.
2.1.4 Provide assistance to industry participants to develop projects in response to the needs of the Northern Australian Vegetable Industry.	<ul style="list-style-type: none"> • IDO assisting in the development of project plans in all major production areas of the Northern Australian Vegetable Industry • Evaluation of projects against 	<ul style="list-style-type: none"> • Project plans • VIDS reports • Project description and needs list. 	<ul style="list-style-type: none"> • Growers reluctant to get involved in collaborative projects. • Projects may be seen to benefit individual needs rather than industry needs.

APPENDIX A
VIDS Project Logical Framework Matrix

	needs list.		
2.1.5 Provide an application writing service to assist industry participants to develop project application and obtain funding for projects.	<ul style="list-style-type: none"> • IDO to develop project proposals for submission to appropriate funding organisations. • Awareness of the service within the industry. 	<ul style="list-style-type: none"> • Project proposals • Response from funding organisations. • Industry response to the service • Methods used for raising awareness of service. 	<ul style="list-style-type: none"> • Funding is available for projects. • Growers not aware of available funding sources.
2.2.1 Establish Best Practice studies in each major production area of Northern Australia.	<ul style="list-style-type: none"> • At least one Best Practice study established in each major production region. • Communication of outcomes of group activities to industry. 	<ul style="list-style-type: none"> • VIDS Project reports. • Industry publication and case study reports. 	<ul style="list-style-type: none"> • Growers are responsive to best practice groups which have a commercial focus. • Lack of trust between industry participants. • Time to be involved in projects may limit interest.
2.2.2 Assist Best Practice study participants to obtain project funding.	<ul style="list-style-type: none"> • Project proposals written and submitted to funding bodies for approval. 	<ul style="list-style-type: none"> • Project proposals and feedback received from funding bodies. 	<ul style="list-style-type: none"> • Funding is available for projects. • Time and skill needed to develop projects. • Growers not aware of available funding resources.
2.2.3 Work with participants of Best Practice studies to achieve project outcomes and develop	<ul style="list-style-type: none"> • IDO maintaining contact with Best Practice participants and providing guidance for 	<ul style="list-style-type: none"> • Progress reports from best practice group projects. 	<ul style="list-style-type: none"> • Maintenance of groups is a high-input activity.

APPENDIX A
VIDS Project Logical Framework Matrix

best practice case studies.	<p>project completion.</p> <ul style="list-style-type: none"> • Best practice processes identified and articulated into report form. • Case studies of best practice developed and reports disseminated to industry. • Case studies of best practice have industry-wide application. 	<ul style="list-style-type: none"> • IDO contact records. • Progress reports from best practice group projects. • Project reports. • Industry feedback • Case Studies evaluated against needs assessment. 	<ul style="list-style-type: none"> • Report is written in a usable form for grower groups. • Models are applicable industry-wide.
2.3.1 Identify the services or activities required by producers to enhance their business capabilities.	<ul style="list-style-type: none"> • Services and activities developed in response to business needs assessment. • Services and activities are available to all industry participants regardless of location. • Positive response from industry to the services and activities provided. 	<ul style="list-style-type: none"> • Evaluation of services and activities against needs assessment. • Evaluation of availability of services and activities. • Feedback from industry. 	<ul style="list-style-type: none"> • Cost of providing activities and services throughout the Northern Australian region may limit scope of these services.

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2.3.2	<p>IDO's to provide assistance to industry participants to form of Chain Alliances.</p> <ul style="list-style-type: none"> • IDO's actively promoting the benefits of Chain Alliances. • Chain Alliances formed 	<ul style="list-style-type: none"> • Media reports • Workshop materials • Record of enquiries • VIDS reports 	<ul style="list-style-type: none"> •
2.4.1	<p>Design and facilitate regional workshops 'The Changing Face of Horticulture' that will specifically address marketing and business issues beyond the farm gate and encourage industry collaboration in project development.</p> <ul style="list-style-type: none"> • Workshops attended by Northern Australian Vegetable Industry participants in all major production areas of Northern Australia. • Workshop content designed to suit each region. • Positive response from attendees. • Workshops completed by October 2000. • Attendance at follow-up activities and requests for assistance. • Collaborative industry 	<ul style="list-style-type: none"> • Workshop attendance records. • Workshop notes and feedback sheets. • Workshop feedback sheets. • Workshop reports. • Attendance record for activities • Record of enquiries. • Project proposals 	<ul style="list-style-type: none"> • Timing of workshops may not suit all industry participants. • Reluctance by growers to attend such activities. • Central location of workshop to facilitate attendance. • Attendees willing to respond to feedback sheets. • The number of requests for assistance has caused difficulty in fulfilling all requests. • Growers unwilling to contribute in some group

APPENDIX A
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	project proposals written.		situations.
2.4.2 IDOs facilitating networking among industry participants.	<ul style="list-style-type: none"> • IDOs act on enquiries and provide contacts for specific information, services and project collaboration. 	<ul style="list-style-type: none"> • Record of enquiries and actions taken 	<ul style="list-style-type: none"> • Not all enquiries are recorded due to time and location when enquires are received.

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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>OBJECTIVE 3 OUTPUTS</p> <p>3.1 A continuous information updating process to service the needs of the Northern Australian Vegetable Industry participants.</p>	<ul style="list-style-type: none"> Information is disseminated to industry on a continual basis. 	<ul style="list-style-type: none"> Record of information sent. Record of information provided in the field. 	<ul style="list-style-type: none"> Not all information disseminated will have industry-wide relevance.
<p>OBJECTIVE 3 ACTIVITIES</p> <p>3.1.1 Design information packages targeted to the needs of each production area</p>	<ul style="list-style-type: none"> Information provided in packages directly relates to the needs of industry participants in each production area. Information presented in a useable form for industry participants. Quality of information presented in packages. Positive response from 	<ul style="list-style-type: none"> Content evaluated against needs assessment. Feedback from industry Evaluation of the currency of information and sources used. Feedback from industry 	<ul style="list-style-type: none"> High cost of production of hard copies and dissemination to industry participants Industry participants receive so much information already. Growers have little time to read and evaluate information. Growers prefer to receive one-on-one advice rather than reading reports.

APPENDIX A
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	industry		
3.1.2 Develop and facilitate regional information workshops	<ul style="list-style-type: none"> • Workshops attended by Northern Australian Vegetable Industry participants. • Workshop content designed to suit each region. • Positive response from attendees. • Workshops completed by July 2001. 	<ul style="list-style-type: none"> • Workshop attendance records. • Workshop notes and feedback sheets. • Workshop feedback sheets. • Workshop reports. 	<ul style="list-style-type: none"> • Industry participants have time to attend workshops. • Attendees are willing to fill out feedback sheets
3.1.3 Develop and facilitate a series of information evenings 'The Changing Face of Horticulture' specifically addressing marketing and business beyond the farm gate which effects long term business viability	<ul style="list-style-type: none"> • Workshops attended by Northern Australian Vegetable Industry participants. • Workshop content designed to suit each region. • Positive response from attendees. • Workshops completed by 	<ul style="list-style-type: none"> • Workshop attendance records. • Workshop notes and feedback sheets. • Workshop feedback sheets. • Workshop reports. 	<ul style="list-style-type: none"> • Industry participants have time to attend workshops. • Growers recognise themselves as business entities. • Attendees are willing to fill out feedback sheets
3.1.4 Develop a web-based information database targeted to	<ul style="list-style-type: none"> • Database completed by June 30 2001. 	<ul style="list-style-type: none"> • Database active 	<ul style="list-style-type: none"> • Information provided is relevant and useful.

APPENDIX A
VIDS Project Logical Framework Matrix

the needs of Northern Australian vegetable industry.	<ul style="list-style-type: none"> • Vegetable industry access the database. • Positive response to database from industry regarding content, use and accessibility. 	<ul style="list-style-type: none"> • Record of enquiry and website records. • Industry feedback from web form • Feedback from contact with industry. 	<ul style="list-style-type: none"> • Not all industry participants have access to web. • Computer literacy is low among industry participants.
3.1.5 VIDS Project team providing current information of projects and activities to the various reporting services available.	<ul style="list-style-type: none"> • Updates provided by IDOs for the various VIDS Project activities. • VIDS Project activities published in available media (Vegetable News, Fruit and Vegetable News Queensland, Good Fruit and Vegetables Magazine, QFVG Website). 	<ul style="list-style-type: none"> • Reports • Published material 	<ul style="list-style-type: none"> • Time constraints limit the ability of IDOs to write articles.

VEGETABLE INDUSTRY NEEDS IDENTIFIED

– A SUMMARY

The following needs were taken randomly from the compiled needs list “List of Vegetable Industry Needs, 1999”. In the compiled list there is further information on the needs, such as the region where they were recorded and the situation ie. if they were recorded during a farm visit or the workshop process used.

1. Production

Professional services

- Professional advice for in the field
- Industry defined officer needed to better disseminate research results and information
- Greater use of consultants

More consistent Production

- How to level out the highs and lows?
- More specialisation of crop production
- Want information about proven agronomic and economic sustainable farming methods

Overproduction

- Need more overproduction for a few years
- Regions growing only during certain time slots
- Need strategies to tackle overproduction
- Need mother natures regulation in combating overproduction

Water

- Concerns about future restrictions – want information about these issues

Research – General, Pest & Diseases, Chemical

- Much of this is regional specific with respect to new varieties for regions, soil management etc.
- Different crops with specific production needs eg Glasshouse growing want research into their pests, and carrot specific diseases etc.
- Why do we have to pay for the research reports that our levies fund?
- General crop information needed.
- Erosion control methods, soil health projects.
- Levy should be spent back on the crop it came from.

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Northern Australia Vegetable Industry Needs – Summary Report

- Sustainability information.
- Pest management strategies.
- Chemicals – replacing those lost, resistance in pests, growers don't want to have to spray, chemical free disinfestation research.

Post – Harvest

- Effective and efficient technology needed.
- Micro-flora of fresh fruit and vegetables.

Varieties and Breeding

- GMO's
- Bred plants to match consumer demands.
- Flavour, disease and pest resistance.
- Identify alternative crops to try and tackle overproduction

Biological Control/IPM/Organic

- Organics – information and trends?
- More implementation and information about natural/bio-controls

2. Business and Financial Management & Labour

Forming Alliances

- Growers working together not against one another.
- How to develop alliances? Co-op's?
- Business groups.
- Share resources, knowledge etc..
- Need a facilitator for these things – an outsider.

Government Assistance

- Government support for the industry needed.
- Re-design the work for the dole program to include vegetable production.
- Government funding to help with research on exporting.
- Subsidise farmers.

Farm Labour

- Relaxation of work VISA's
- Formation of quality employment provider.
- Need to maintain labour availability.
- Need training incentives.
- Less social security payments!

Management & Training

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Northern Australia Vegetable Industry Needs – Summary Report

- More business oriented
- Able to increase farm succession.
- Training information & courses.
- Computer literacy.
- Up-skilling management and business levels.
- Extend FutureProfit scheme to benefit growers in all areas.
- Contract harvesting needed.
- Information dissemination and extension is lacking for farmers to get information.
- Governing of planting to tackle overproduction and increase profit margins.

Financial Assistance

- Finance for farm equipment must become more flexible.
- Financial institutions that will assist smaller businesses.

Computer training

- Internet usage.
- Farm oriented software.
- A financial package that is ready and all growers have to do is put in the numbers.
- MYOB small crops.
- Growers need to learn how to use computer.

3. Quality & Marketing

The QA System

- QA needs to add value to the farm
- QA needs to follow through beyond the farm gate.
- Product identification and traceability systems needed.
- Growers need to have more input into setting the QA standards.
- Set the standard, not so much accept the standard.

QA Training

- There is a lack of personnel to provide training.
- Should be more education programs on how to handle the produce right through the system.
- QA & HACCP education for pickers, packers, public (refrigeration), chain stores (improve handling).

Marketing Systems

- More accountability of agents.
- Someone needed to make sure and enforce honesty in market agents.
- More specialised agents needed within the markets.

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Northern Australia Vegetable Industry Needs – Summary Report

Cool Chain Management

- Training in cool chain management for everyone in the cool chain.
- Make the cool chain streamlined.
- Temperature control all the way down the chain – especially at the market docks!
- General handling also needs to be addressed after it leaves the farm gate.

Marketing Alliances

- Fix the disorganisation of marketing.
- Want vertical and horizontal marketing groups.
- Growers need assistance to work together.
- Do a survey of growers who want to network.
- Chains need to be education of understanding the whole production process.

Packaging

- The cost of packaging is very expensive.
- Extended shelf life.
- Packaging and presentation and storage.

New Markets

- Value adding.
- Electronic marketing systems developed.
- Develop markets for new varieties before they are produced.
- Identification of market opportunities.

Export Markets

- Growers need assistance to enter export markets.
- Research on how to get into export marketing.

Maintaining High Quality

- Process all second grade fruit and take it off the market.
- QA required all along the chain to make it worth while being part of.
- Need produce description defined.
- Vegetables need to get to the consumer faster.
- Whole chain needs to be educated on how to maintain quality – even the consumer!

Clean & Green Image

- Adoption of a code of practice for vegetable industry (environmental issues).
- Definitions on quality and food safety.
- Recycling of plastic mulch.

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Northern Australia Vegetable Industry Needs – Summary Report

- Credit for producing vegetables in an environmentally friendly manner.
- Concerns for the Great Barrier Reef.

4. Consumer Demands

What do they really want?

- Want to know what the REAL consumer wants.
- Want consumer needs communicated to the growers – they want feedback.
- Want a two way flow of communication directly with the consumers.
- Want to know what the future demand will be eg. in 10 years time will consumers only buy washed potatoes or will they still buy brushed?
- Consumer questionnaires on quality of produce, perhaps a national survey.

Providing Consumers with What They Want

- Provide consumers with vegetables that are tasty, safe, perform well & are consistent.
- Provide consumers with ease and speed when shopping and cooking.
- Value adding, processed, pre-packed foods, convenience.

Vegetable Promotions

- Should influence the consumer and raise the profile of fresh vegetables.
- Make consumers more aware of the nutritional value.
- TV advertising.
- In-store promotions – get them to taste it!
- Advertise the Clean & Green image – we do care for the environment!
- Want promotion to work better.

Educate the Consumer

- Food safety issues, nutrition and food preparations.
- How to use fresh vegetables.
- Accepting a blemished product.
- GMO Food?

5. Transport

Transport Systems

- No more levy should be spent on transport?
- Transport companies need to keep up with technology.
- Information about transport options for export.

Packaging

- Reduced packaging costs.
- Systems for packaging and transport that preserve quality.

APPENDIX B

Northern Australia Vegetable Industry Needs – Summary Report

- Need to look at the potential for recycled crates.

Cool Chain Management in Transport

- Much the same as the issues in Quality and Marketing.
- Paddock to plate.
- Export Cool Chain Management.

Quality Management in Transport

- People required with practical understanding of how to handle vegetables.
- Need a better understanding of where quality deteriorates in transport.
- Education of workers in chain stores.

WHAT IMPACT DO YOU THINK THIS MEETING WILL HAVE?

Feedback from the Workshops

- Better direction on where money is to be spent.
 - The information has to be used.
 - Focus on direction.
 - Help QFVG delegates in allocating research funds.
 - Hopefully get our ideas back to QFVG and get them on the right track.
 - Better awareness of grower needs.
 - None/very little/slight.
 - Hopefully farmers will be able to think about what other farmers do and how they can incorporate their ideas into doing the job.
 - Change to the use of levy fund for research.
 - Improved research priorities.
 - Keep people thinking about the future.
 - Start the ball rolling.
 - Help people to come together as a group instead of individual farmers.
 - Hopefully the Government and QFVG will take notice.
 - Positive as long as the information is used to benefit the industry.
 - Should create a desire to change.
 - Hopefully give clearer focus to R&D requests.
 - Make people think about what's really relevant.
 - Difficult to know, at least you've had the opportunity to have your say.
 - Long term planning and strategy.
- Lead to greater understanding between QFVG and growers.



Vegetable Industry Development Officer Meeting

Rydges Hotel, Brisbane

16th January 2001

Introduction

The Vegetable Industry Development Officers organised a meeting on the 16th January 2001 in Brisbane, to discuss opportunities for collaboration and improved networking within the team.

All meeting expectations were met, except the one addressing AUSVEG, which will be met when there is an AUSVEG National Communication Strategy. Other issues and actions regarding AUSVEG will be raised at an AUSVEG Project Management Team Meeting at a later date.

The team discussed the roles we have as VIDO's and outlined activities undertaken in each state. An important part of the day was identifying the strengths and weaknesses of the team, which formed the foundation of identifying opportunities to work together to address the 'weaknesses' with positive activities.

Outcomes/Actions

- Draft a National Vegetable IDO brochure.
- Meet 4 times a year – 2 for R&D proposal review, 1 for project communication evaluation, 1 for discussing national industry needs list.
- Regular contact via teleconference and list server.
- Continue to summarise CDP's.
- Continue to submit articles for Good Fruit & Vegetables magazine.
- Over seas trips and study tours information will be collated and circulated to all states.
- Create a national vegetable industry R&D priority list and review it annually.

Attendants

- | | |
|---------------------|------------------------|
| • Samantha Heritage | Northern Australia IDO |
| • Patrick Ulloa | Victoria IDO |
| • Alison Anderson | NSW IDO |
| • Craig Feutrill | South Australia IDO |
| • Jonathan Eccles | HRDC Program Manager |
| • Shane Comiskey | Northern Australia IDO |

Absent

- David Ellement Western Australia IDO

APPENDIX D
National IDO Meeting Report – 16 January 2001

Workshop Results

Meeting Expectations:

- Increase communication between the VIDO network.
- Prioritise our activities as IDO's.
- Common activities – TOGETHER. What can we do?
- Different roles in each state and different activities – how and where do we overlap?
- Defining the role of the VIDO.
- How do IDO's see themselves fitting into AUSVEG Vision? – **will be addressed on Thursday (18th Jan 2001) AUSVEG Communication meeting.**

Strengths:

What Strengths do we have, or should have as a group?

<u>STRENGTHS We Have</u>	<u>STRENGTHS In Between</u>	<u>STRENGTHS We Should Have</u>
<ul style="list-style-type: none"> • We can ID industry needs and issues directly from growers/industries. • R&D money and good resources. • Respect – each other and our opinions and experience. • Diversity – group skills. • Good relationships – growers, research community, good networks, HRDC. • Individual vision – good ideas. • Trust from growers. • Creativity – the different way we all do things, diversity of skills. • Commitment – to the purpose of what IDO's are trying to achieve. • Unity – as a group. 	<ul style="list-style-type: none"> • Communication between us – needs to be formalised. 	<ul style="list-style-type: none"> • Grower awareness of our activities. • Purpose direction for our activities. • Communication plan – feeds into AUSVEG. • Leadership – not control, but grower motivation. • Co-operation – the only thing we do together is summaries of proposals. • - using different skills to aid each state. • Trust – amongst ourselves and the larger group. • Common Vision.

- A challenge we have – industry communication and R&D levy benefits.

Weaknesses:

- No common vision
- Hidden agendas
- Different expectations.
- Geography of distance to travel (some states) → creates different needs/issues.
- We don't communicate as often as we should.
- Lack of direction for the national vegetable industry – an operational framework.
- Being associated with state organisations.
- Having to work with different levels of skill – the growers. *A challenge we face.*

Our Role as IDO's:

- Facilitate the development of the industry.
- Facilitate technology transfer and adoption (from any source, not just from R&D research).
- Increase grower awareness and provision of (where applicable) of information sources and services so they can be more profitable.
- Identify impediments to the industry and possible solutions.
- Assist implementing AVIDP.
- Facilitate communication between researchers and growers.
- Facilitate communication within the industry - Need a communication plan.

What do we do in each state?

Qld/NT/Nth NSW	NSW	Vic	SA	WA
<ul style="list-style-type: none"> • Specific services into specific regions • Industry events – assist • Continue R&D input • Workshops/meetings to ID needs & issues and for information delivery. • Researchers – project information, communication plans • Newsletter R&D Devoted? • Vegetable News • Website – QFVG Veg • Other project teams • Linking up growers to people who can help. • Shane’s meetings – marketing & Business development (awareness meetings) • Funding and training 	<ul style="list-style-type: none"> • Meeting growers/ researchers • Workshops to ID needs • Developing database 	<ul style="list-style-type: none"> • Database • Vege Link • ID workshops • Short courses/seminars • Minor Use registration • Assist growers with proposal application • Assisting to formalise discussion groups • Environment project • Assist researchers with communication strategies. 	<ul style="list-style-type: none"> • Database • Veglink • ID workshops 3 years in a row • Food Fruit and Veg Mag • NAPTAG – nthn Adelaide Plains Training Advisory Group • Minor Use registration • Tours – eg. Israel protected cropping, Israel/California (fall back is Spain) reclaimed water. • Direct Mail • Groups • IT (joint Veg/Pot web site) • Steering committees • WFT 	<ul style="list-style-type: none"> • Vegelink • WA Grower – outcomes of R&D projects • Minor Use • Industry meetings/workshops • Targeting information to growers • Management group reports • Carrot conference

applications for the growers			• Sustainability workshop	
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Addressing the weaknesses we identified & the strengths that we should have:

➤ **Grower awareness of our activities**

National IDO brochure

We now have IDO's in every state.

Patrick will do a draft by Mid Feb. and will get a cost to the other states for production so we can share the cost.

Have photo's – single mug shots and/or group photo – TBD

National network

Linkages across states

We are not defacto government extension officers!

Distribution of final brochure state responsibilities.

Final complete by March R&D meeting.

➤ **Purpose and common vision**

Have some general statements for the brochure & to pass on our thoughts/ideas for Thursday.

- ID industry needs and issues – industry R&D priorities
- Help industry ID and address issues eg CPA
- Facilitating linkages between industry people at all levels.
 - training
 - connecting people
 - information and services access
 - formation of groups
- facilitating technology transfer and adoption
- assisting communication of R&D outcomes and industry issues
- facilitate provision of services to assist in the development of the vegetable industry.

➤ **Communication Plan**

We don't get together as often as we should – we need a reason.

Make it formalised.

◆ **Meetings – 4 times a year.**

- March
 1. For the review of the full proposals
 2. To evaluate the effectiveness of R&D projects in each state. It was proposed that we give a review of the R&D projects going on in our states and the other states can ask questions and inform others if they have/or have not heard of the project and it's activities. This should give an indication of the effectiveness of the project reaching the other states. It would then be up to the state IDO to inform the project leader if something needs to be done about it.
- October
 1. For the review of the CDP's

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National IDO Meeting Report – 16 January 2001

2. National Industry needs list review/discussion. Create/review the national needs list for the next year – make the document public.

NB: a national needs list will be collated by March 2001.

◆ Teleconference

A regular conversation hook up to let each other know what's going on and ask questions and generally touch base. **David Ellement will set up the first one** as he could not make the meeting and will have questions and clarification of the workshop notes.

Intervals to be determined – monthly, bi monthly, quarterly? We will see how it goes.

◆ List Server

Craig Feutrill will set up a list server for us to chat on. We felt that this was a very quick and easy way to reach every one at once. This will be a chat server for the IDO's only (don't want to make it too big) and will include LHN, SC & RK. CF will set it up by the 26th January. This will be to chat, update and general day to day contact sheet. It may make the teleconferences not necessary on a regular basis.

➤ **Leadership**

We now feel that we have some leadership and direction amongst our selves from our discussions today.

➤ **Co-operation/linking of our activities**

1. The national IDO brochure – **PU, Team**
2. Summaries of the CDP's for the R&D committee - **Team**
3. Good Fruit and Vegetables Magazine - Project implementation articles and pictures.
 - **CF to re-email all of us the due dates for articles**
 - **29th January is the due date for the March Issue!**
4. Gather information about overseas trips/study tours and activities and make it all public and circulated – **PU will be the central point for this information and will disseminate it on a continual basis to the larger group.**
5. We will make a conscious effort to keep in touch and up to date with what we are doing - List Server will make it easier to reach all at once - **Team**
6. Review of Technology Transfer effectiveness of the state projects – IDO's to get together to exchange state activities. Link the time (annual) to when we meet to review the CDP's – **Team**
7. Pool our needs lists into a national list – **Team**
8. Review of the needs list annually - **Team**

➤ **Pool our needs list into a national list**

AUSVEG – Thursday meeting.

Collating of state information – formally → feed it into the AUSVEG operating plan
→ a public document.

Samantha Heritage will collate the information by 12 February. All team members to email their documents to SH by 24th January.

➤ **Hidden Agendas**

The team felt that having more open and regular communication will overcome any hidden agendas at meetings – **communication to keep up by all in the team**

➤ **Different Expectations & State Organisation Association**

The Executive Officers in different states, from different organisations expect different actions and activities from the IDO's. We all do different things in our different states, but as long as it is acknowledged that each state has different needs for a range of different reasons and we all work towards that same goal it should not be a big issue.

➤ **Distance to travel**

This is an issue for David Ellement and he is currently sorting it out. The other IDO's will be there to support and help where they can. **DE**

Other Issues:

R&D Priorities

It was suggested that we gather our top 20 R&D priorities from each state, look for commonalities, split them into product groups (if applicable) and then relate the list to the AVIDP.

We need to establish some common mechanism.

We need to communicate current information that addresses the needs identified by the growers.

To be raised at the AUSVEG meeting on Thursday

APPENDIX D
National IDO Meeting Report – 16 January 2001



VEGETABLE INDUSTRY NEEDS – NORTHERN AUSTRALIA, 2000

ARISING FROM REGIONAL WORKSHOPS AND FARM VISITS



This report identifies areas where the vegetable industry in northern Australia needs to improve in order to become more profitable, sustainable and market driven. This list was generated by addressing the 'List of Vegetable Industry Needs 1999' with existing information sources and services and assessing their relevance. As well as new needs and issues, the list still contains needs from 1999 which could not be sufficiently addressed with current information and services.

The needs are regionally coded with bullet points under each heading. Comments and interpretations from the workshop notes and work sheets are included at the end of this report for reference.

The different bullet points represent needs identified from each region.

- | | |
|----------------------------|----------------------|
| □ Northern New South Wales | ● Granite Belt |
| ◆ Darling Downs | ♣ Bundaberg |
| ■ Brisbane Metropolitan | ❖ Lockyer Valley |
| ➤ Fassifern Valley | ⇒ Gympie |
| # Sunshine Coast | ☒ Gumlu |
| ✕ Ayr | ☞ Bowen |
| * Rockhampton | ~ Northern Territory |

PRODUCTION

- Systems to protect carrots from the wind, especially in sandy soils. (WA research?)
- The industry needs organising on a regional basis – to tackle over production. Look into contracting, minimum price structure.
- ❖ Promote the benefits of adopting Farmcare.
 - Water reliability.
 - Information on incorporating organic and IPM principles into production practices. Not to become accredited, but to utilise the principles.
 - ◆ Bumble Bees in glasshouses.
 - ◆ Capsicum and Silverbeet nematode registered chemicals.
 - ◆ Celery Mosaic Virus.
 - ◆ Herbicide registered for broad leaf weeds in lettuce.
 - ◆ Chemicals – good products not available to use in rotation for heliothis control.
 - ◆ Control of thrips.
 - ◆ Alternative to endosulfan.
- ~ Fusarium wilt resistant link of snake beans.

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- ~ Nematode control for snake beans.
- ~ Better Melon productivity on different trellis designs.
- ~ Pest Identification for growers.
- ♣ GMO Research - only needed if it (GMO food) is a problem eg. nutritionally or environmentally.
- ♣ Soil fumigants and Methyl Bromide research - there are still gaps in the research and priorities need to be set in this area.

QUALITY & MARKETING

- ❖ How do consumers feel about IPM and organic produced product?
- ❖ Market research to identify new markets.
- Value adding second grade fruit – what options are there?
- New product development – explore value adding, pre packaging and other opportunities.
- Cool Chain Management implementation past the transport through to the consumer.
- Export markets.
- Niche markets.
- # Research into cold room storage for Chokos – any other possible cold storage?
- # There is a need for a standardised QA description for each type of product.
- # Export new products (new to exports) – identify new markets.
- ◆ Microbiological limits – what is acceptable from the paddock to the plate?
- ◆ Cost of packaging need to be cheaper.
- ◆ Why can't we use second hand cartons?
- ♣ There is a need to increase the awareness of globalisation and what else is happening in the market places. Growers need to get together to supply.
- ♣ Market research is needed – case studies and available information . Identify innovation and opportunities. Make it all available to the industry, it is up to the individual to take hold of the opportunity if they see fit.

BUSINESS, FINANCIAL AND LABOUR MANAGEMENT

- Grower unity.
- Workers compensation premiums in arrears. – WHAT DOES THIS MEAN?
- ❖ Information on getting out of the industry all together.
- ❖ Better utilisation of backpacker labour.
- ❖ Need specialist staff to help with on farm training.
- ❖ Computers – using software on a day to day basis, is there vegetable industry specific software? Is that specific necessary?
- Alliances.
- Business and Market Development Service.
- Staff training (access to).
- Attracting new/young people into farming.
- # Chasing agents who go broke.
- ◆ Effluent recycling from the cities to be used on farms – not pumped out to sea.

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- ◆ Some sort of labour control – perhaps a share/hire system, a pool of skills & reliable labour to draw on in the area (Gatton/Toowoomba).
- ◆ Overproduction and the end price the growers receive are the biggest issues to address.
- ♣ We need more focussed projects rather than broad brush industry activities. Identify the individuals (or businesses) and have commercial outcomes.

CONSUMER DEMANDS

- What does the final consumer want?
- ❖ Where is the demand for organics?
- ❖ What is the future for current vegetable products that generate waste in the market or the kitchen? This cost may not be worn by the consumer and require more processing or different harvesting on farm.
- ❖ Work with chain stores to develop better systems.
- ❖ Can the vegetable industry take advantage of being GST free?
- Production forecasting information would help regulate supply.
- # Consumer needs and consumer research.
- # Consumer education about real and perceived quality.
- # Development of charts on how to grow and use vegies.
- # 'Do' cards.

TRANSPORT

- Freight forwarding opportunities.
- Investigate the collaboration of sea freight companies on price fixing.
- ❖ R&D Levy to be used to address transport packaging that preserves quality.
- ❖ Establish harvest companies that organise the harvest and know the produce and it's handling requirements etc.. – negotiate with the Lockyer Producers Association.
- Bring back rail transport.

COMMENTS AND INTERPRETATIONS FROM THE WORKSHOPS/VISITS.

These notes also include suggestions made by workshop participants.

Fassifern Valley

➤ **Business, Financial Labour management**

Comments regarding the Vegetable Market Development Strategy and the Demand Chain Alliance projects included: Worthwhile – needs to be a big push to consolidate growers and form linkages to ensure continuity of supply. And the DCA project needs to include the chain stores.

Future Focus received a positive comment.

If I misinterpreted a need or issue it was usually addressed by a participant who knew of an option that other growers could take, so they solved the problem themselves.

Grower unity was seen as a high priority and utilising the Vegetable Market and Business Development Service, but the competitive environment may hinder it.

➤ **Production**

QFVG need to develop standard for professional advice – this comment is about creating a preferred supplier data base, something QFVG is already undertaking.

A suggestion was made to have a QFVG person to liaise with the chains. This position already exists (John), perhaps the growers aren't aware of it?

➤ **Quality and Marketing**

Preferred supplier list also to include in field advice and consultants or qualification and what to look for when choosing.

➤ **Transport**

Insight into freight forwarding opportunities within central marketing system, sea freight. → suggestion was to look into freight co-ordination for part loading through freight forwarding service/person. This could already be available?

➤ **Consumer Demands**

I think that the relationship that the QFVG Ltd promotions department has with the chain stores need to be advertised to growers.

Lockyer Valley

❖ **Business, Financial & Labour Management**

Some clarity of last years need was obtained.

Need to better utilise back packer labour.

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A suggestion was to get the vegetable industry involved in apprenticeship type schemes (this would produce skilled labour and provide incentive to work in the industry).

A comment was made to tap into community development funds to increase the 'status' that producers have and the whole image of rural communities.

Growers would like cost equivalent to local calls and better mobile phone coverage in the Lockyer Valley. This is not an issue to be addressed by the R&D Levy.

❖ **Production**

Information for people who want to get out all together – goes in BF&L.
Look up Eco-labelling report from page 4.
Organics & IPM – what do consumers feel about it? – goes in CD's

❖ **Quality & Marketing**

Workshop comments reflected that the areas of QA is covered with existing information and growers know where to go and what it's all about.

Growers are aware of Farmcare but they feel that there is a need to promote why you will need to do it.

Market research is still felt as a priority for levy investment.

❖ **Consumer Demands**

Growers still want to see the raw data from consumer market research, I don't think that they will believe that it is gathered unless they see it for themselves!

I feel that there is a real need to get the consumer and market research information to the growers, more than just the Vegetable News Issue 4 – all of it.

Grower comment on the issue of GMO's – focus on consumer benefit, rather than production or scientific benefits.

❖ **Transport**

A transport need that was clarified stated 'information kits and publications and adoption' on Cool Chain management. The Cool Chain Management Project sent out information about this to all of the participants, hence this has been addressed.

Granite Belt

• **Business, Financial & Labour Management**

The area of business and financial management is obviously an area that needs attention here, however the feedback did not emphasise a strong positive or negative for the services available. There is real opportunity here to exercise more of the Vegetable Market and Business Development Service and Future

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Focus, although participation may be limited (a comment made during farm visits also supports this).

The area of labour, illegal workers and work VISAs is constantly being addressed by QFVG and is not something I feel the R&D Levy can help with. It is higher and more political than just pouring levy funds into it.

This region was satisfied with the information supplied about computer software available.

- **Production**

Reliability of water needed – Rural Water Use Efficiency is only part of the answer.

Grower comment – ‘get results back to the grower about chemical registration for crops’. I feel that this is already carried out in F&C News and the Newsletter that the Pest Management Officer will publish.

Ask Janine if the CPA newsletter is sent out to the growers?????

The area of organics was not satisfied, they are more interested in incorporating the principles than becoming accredited. This includes incorporating IPM principles.

The issue of GMO's was addressed.

- **Quality & Marketing**

The information regarding the Cool Chain Management project only partially satisfied the growers. While this project addresses the issues they are concerned about the CCM past the transport and right through to the consumer.

There is again opportunity for the Vegetable Market and Business Development Service – reflected in the comment: ‘growers need to develop a business relationship with agents/merchants’.

Ask PD about the Wally Collins Comment

These workshop notes reflect a general discomfort about QA. Freshcare information needs to be fed into this area?

- **Consumer Demands**

Despite the information provided about the Vegetable Promotions Campaign the growers still want to see what the final consumers themselves want not the supermarkets.

A grower suggestion was: ‘sample age group to determine trends of single, young families as well as older generations – need to do in organised fashion to represent city and regional areas’.

Value adding of second grade produce – growers consider that utilising this is a challenge. Take it off the market floor and explore options to value add it.

Growers were satisfied with the information supplied about new variety development.

- **Transport**

No comments were made against last years needs and there were no new issues raised, hence no transport issues will be included for the Granite Belt region.

Northern New South Wales

- **Business, Financial & Labour Management**

The same labour issues arose in this region, such as staff incentives to stay working.

The growers were happy with the information supplied about computer courses and software.

Growers were happy with QFVG providing assistance, information and knowledge of programs available to growers, but they suggested that it cover:

- Farming for the Future (Property Management Planning)
- More research on export market locally for a group of local growers – feasibility study – look at model in the Lockyer Valley.
- Local vege co-op and contract packing house – grower control marketing.

Grower suggestion – a series of seminars with professional to cover vegetable marketing co-op's.

- **Production**

There is a strong need here for Agricultural consultants and/or a government department representative (unfortunately there is probably too few growers to warrant a Government position).

- **Quality & Marketing**

Opportunities for export and niche markets were the only needs arising from this section, the growers were happy with all other information provided.

- **Consumer Demands**

Growers feel that production forecasting would be beneficial to help regulate supply.

Promotions are note felt to be co-ordinated with glut supplies.

- **Transport**

The only comment made in relation to transport was to bring back the rail.

Brisbane Metropolitan

The growers in this area were visited individually. This was due to the low number of active growers in the area and the anticipated lack of attendance if a meeting was held. The growers were very happy with the information supplied to address the needs and issues and did not have any new needs to add to the list. Any questions that arose during the discussion were promptly addressed.

Sunshine Coast

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The format for this workshop was different to those previously held. The small number of participants decided to have a plenary discussion instead of breaking into small groups. This worked well and we were able to address concerns and questions as they arose. New needs that arose have been added to the list. In general the growers were happy with the information provided.

Darling Downs

The growers in this area were visited individually. This was due to the low number of active growers in the area and the anticipated lack of attendance if a meeting was held. The growers were very happy with the information supplied to address the needs and issues. New needs did arise and there were also additional issues that could be addressed straight away without adding them to the list

◆ Production

The needs in this areas were quite typical and included chemical registrations for nematodes, weeds and insect pests.

◆ Business, Financial & Labour Management

One grower felt that the area of overproduction and the end price received by growers is the biggest issue to tackle here.

Labour access is also is a problem and the suggestion of a labour share/hire systems be established.

◆ Quality & Marketing

Microbiological limits on fresh produce is concerning growers, they want to know what are acceptable limits.

The costs of packaging affecting production costs and the use of second hand cartons is still an issue.

◆ Transport & Consumer Demands

Now new needs or issues arose in these areas.

Northern Territory

The Northern Territory needs have been supplied by the Northern Territory Department of Primary Industries and Fisheries.

The Vegetable Industry Development Service – Northern Australia is responsible for assisting vegetable growers of the Northern Territory. The majority of these producers are of Non English Speaking Background, mainly Vietnamese. This poses a cultural hurdle for the Industry Development Officers and hence has been approached in a different manner.

The project team has collaborated with a project called ‘Pilot project on Extension and Communication with Asian Non-English Speaking Background (NESB) Vegetable Growers for the adoption of Best Practices’ (joint funded by RIRDC and HRDC). This project has a Vietnamese speaking

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Communications Officer (CO) in Darwin to communicate and build up a level of trust with the Vietnamese growing community. The VIDS is providing support to the CO in the way of information, resources, national representation and funds to help develop educational and training needs.

Bundaberg

The approach in Bundaberg was different to other regions so far. I wanted to build on the knowledge they already have. I presented the needs and issues point by point and asked them to comment on them. After comments and brief discussion I presented the options that I had for them. I put together their comments and my comments and sent out the list with all comments a couple of days later. Most of the issues, as I expected, are not really important issues and were wiped off the list. Most of the issues remaining were to do with Marketing and Business issues. The meeting went for longer than expected due to the large turn out – 23 growers! We were also going to run Future focus, but DM hurt his back and it was re-run at a later date. Over all I thought that it was a good process to use and would have worked much better than it did if there was a smaller group.

APPENDIX F
R&D Workshop Participant List

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APPENDIX H
VIDS Best Practice Projects

Table 1. VIDS Best Practice Projects (as at 22 June 2001)

Abbreviations: QRAA – Queensland Rural Adjustment Authority

HAL – Horticulture Australia Limited

DSD – Queensland Department of State Development

DEWSBR – Department of Employment, Workplace and Small Business

DRAP – Dairy Regional Assistance Program

RSP – Regional Solutions Program

Region	Project Name and Number	Funding Body & \$ Amount	Term of Project	Parties Involved	Comments
Granite Belt	1. Kool Country Packers Ballandean	Not applicable	6 months	Pinnacle Management and 6 businesses	Project completed. Business operations in place. 6 Businesses involved.
	2. Development of Disease Forecasting Models	HAL (application being completed)	To be determined	Agrilink Australia, 1 producer and other collaborators to be determined.	Project aims to develop disease forecasting models for leaf diseases of celery and lettuce using local area weather station information. The information will be used to develop regional forecasting models.
	3. Wombok to Japan	Not applicable	18 months	3 family businesses (2 from Granite Belt and 1 from Lockyer) with Australia based Japanese agent and Japan based processing business.	2 year project that in the current year is resulting in the programmed supply of 88 x 40' containers to Japanese customer for processing. A watching brief is being maintained on this project in future.
Fassifern	4. West Farms Grower Network	Not applicable	2 months	6 producer families.	Facilitation of an alliance network of 6 carrot producers who are now supplying increasing orders of product direct to retail customers through a grower-consolidator
	5. Fassifern Packers Business Applications*	DSD, RSP (DEWSBR) \$50,000 to date	Ongoing – 6 months	Boonah Shire Council, 4 producer businesses and 2 service provider	Funding applications to construct a Not-for-Profit central business centre, incorporating a number of separate packing and marketing entities, transport

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VIDS Best Practice Projects

				businesses.	operations and other associated business enterprises. Regional and horticultural producer benefits in terms of efficiency gains and employment are considerable. Project comprises 3 separate funding applications to assist with different aspects of the project.
	6. Environmentally Safe Produce*	Not applicable	2 months	Initial group size was 15 producers.	The group aimed to develop a network of producers to produce vegetables under an agreed set of guidelines. These guidelines would result in produce being produced in an ecologically sustainable manner. The initial project exercise was to identify the issues/ areas of focus for the individual producers to form into a group. The project is still ongoing even though IDO is no longer working with the group.
Lockyer	7. Bean Prepackaging Research Alliance	DSD \$19,750**	Ongoing	Food Sciences Australia and 3 bean production entities (Gympie Packhouse, 1 NQ producer business and 1 Lockyer producer business)	Facilitation of an alliance network of 3 bean producing businesses exploring the development of packing technology to supply prepacked beans to the chain store retail market in Australia
	3. Wombok to Japan	Not applicable	18 months	3 family businesses (2 from Granite Belt and 1 from Lockyer) with Australia based Japanese agent and Japan based processing business.	2 year project that in the current year is resulting in the programmed supply of 88 x 40' containers to Japanese customer for processing. A watching brief is being maintained on this project in future.
	8. East Coast	QRAA	Ongoing,	9 producers (3 from	Assistance with the development of a producer

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	Bean Alliance	\$20,375***	18 months to date	Lockyer and 6 from NQ) and Pinnacle Management	alliance of 2 bean growing enterprises with a view to negotiate long term supply agreements and category management with a major Australian based retail operation.
	9. Valleyfresh Ltd	Not applicable	To be determined .	6 producer families involved in the cooperative.	Project to be commenced in June 2001. Assistance with the maintenance of a producer co-operative with a major focus on group dynamic issues and development of visions for the future.
	10. Beetroot Alliance	Not applicable	To be determined .	10 producer families involved.	Project to commence in June. Focus of project is to examine alternative methods to assist in the formulation of beetroot producers group to assist in the development of improved linkages with their major processor customer.
	11. Eco Foods*	DSD, DRAP \$276,000 to date	Ongoing, to be determined	1 producer family, UQ, EPA, DPI (aquaculture) project is expected to ultimately involve many SME's	Project already commenced. Funding applications for some aspects of the project are still being negotiated. Development of project framework with client has been completed. Project aims to develop an integrated agri-aquaculture fertigation farming system to minimise environmental impacts whilst increasing per unit area turnover.
	12. Lockyer Valley Export Group Alliance Development	Not applicable	Ongoing	5 producer businesses and 2 service provider businesses.	Assistance with the important process drivers associated with this producer alliance to enable them to function as a successful exporter alliance to international business houses
Sunshine Coast	13. Chokos Producers Alliance	Not applicable	1 month	6 businesses.	The project's objective was to assist in the development through learning activities, of a choko producer network to enable them to better supply customer needs. Project did not proceed due to lack of producer interest once project plan was

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					developed
	14. Sunshine Coast Future Focus	QRAA \$2,000	1 meeting + follow-up	22 producers and David Milstein & Associates	Workshop aimed at identifying the training and skills development needs of vegetable producers
Gympie	15. Gympie Local Producer Association	QRAA \$7,650	3 months	7 producer businesses and David Milstein & Associates.	Provision of Working in Groups program to explore the necessary requirements to amalgamate a number of producer associations to enable the collection and dissemination of information in the most efficient manner possible. This project was regionally based.
	16. Gympie Packhouse Redevelopment	QRAA \$47,280	18 months	16 producer businesses and Pinnacle Management	Program of activities funded externally to undertake to improve the internal and business relationships of this producer group owned business.
	17. Best Practice Bean Handling Project	HAL \$21,000	18 months	10 producer businesses and DPI	Project to be completed in December, 2001. Project aims to identify and quantify the best practice handling schemes necessary to produce and market high quality hand picked beans. Current role is to oversee the projects progression.
	7. Bean Prepackaging Research Alliance	DSD \$19,750**	Ongoing	Food Sciences Australia and 3 bean production entities (Gympie Packhouse, 1 NQ producer business and 1 Lockyer producer business)	Facilitation of an alliance network of 3 bean producing businesses exploring the development of packing technology to supply prepacked beans to the chain store retail market in Australia
	18. Gympie Packhouse Marketing Development	QRAA \$20,650	8 months, ongoing	16 producer businesses and Pinnacle Management	Program of activities funded externally which positions the business enterprise at the forefront of the industry due to the development of a collaborative marketing program (with chain stores

APPENDIX H
VIDS Best Practice Projects

					and individual businesses).
Bundaberg	19. Bundaberg Food Processing Park	Not applicable	Ongoing, 1 month to date	Indeterminate number of producers are to be involved.	Assistance with a program aimed at identifying the steps necessary for the development of supplier networks to processors associated with the Bundaberg Food Park. An indeterminate number of producers are to be involved in this project
	20. South Burnett Small Crop Growers Alliance	QRAA \$15,000	12 months, ongoing	45 producers from outset (now reduced to 14) and Pinnacle Management	Project has resulted in an improved level of marketing skills of individual producers and the identification of 4 chain projects which the alliance now has the skills to proceed with.
Mackay	21. Mackay Local Producers Association	Not applicable	2 meetings	12 producer businesses.	Assistance with a program aimed at identifying the steps necessary for the development of commodity supplier networks.
Bowen/ Gumlu– North Queensland	7. Bean Prepackaging Research Alliance	DSD \$19,750	Ongoing	Food Sciences Australia, 3 bean producing entities (Gympie Packhouse, 1 NQ producer business and 1 Lockyer producer business)	Facilitation of an alliance network of 3 bean producing business exploring the development of packing technology to supply prepacked beans to the chain store retail market in Australia.
	8. East Coast Bean Producers Alliance	QRAA \$20,375***	18 months	9 producers (3 from Lockyer and 6 from NQ) and Pinnacle Management.	Assistance with the development of a producer alliance of 2 bean growing enterprises with a view to negotiate long term supply agreements and category management with a major Australian based retail operation.
	22. Queensland Capsicum Producers Alliance	Not applicable	To be determined	3 businesses and 2 service providers.	Project action plan currently being developed. Project will seek to identify funding sources which will assist in the development of a cross-regional alliance network
	23. Gumlu	QRAA	Ongoing	21 producers and	Project aims to improve the level of marketing

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	Producers Alliance	\$21,375		Pinnacle Management.	skills of individual producers and to assist in the formation of chain projects following opportunity identification.
Burdekin (Ayr)	24. Cucurbit Prepackaging Research Project	To be determined (DSD)	To be determined	Food Sciences Australia and 1 producer family	Research project in the prepackaging of cucurbits.
Far North Queensland	25. Queensland Taro Alliance	Not applicable	To be determined	6 producer businesses.	Project to be commenced in June/July. Focus of project is to examine alternative methods to assist in the formulation of taro producers group.
	26. Atherton Tableland Future Focus	QRAA \$2,000	1 meeting + follow-up	12 producers and David Milstein & Associates	Workshop aimed at identifying the training and skills development needs of vegetable producers
	27. Mareeba Future Focus	QRAA \$2,000	1 meeting + follow-up	8 producers and David Milstein & Associates.	Workshop aimed at identifying the training and skills development needs of vegetable producers
Brisbane Metro	28. Asian Vegetables Product Development	To be determined	To be determined	QFVG (Promotions section), Asian Vegetable Growers Association, chain store retailers.	The aim of the project is to lift the profile of the Asian Vegetable Industry at the retail level.
	29. Red Coral Lettuce to Japan	Not applicable	6 months	2 companies involved in the initial stages.	Project involved the development of a network of hydroponic red coral lettuce growers for export to Japan. Project did not proceed due to inability to meet quarantine restrictions imposed by Japan
Northern New South Wales	30. Sweet Potato Producers Alliance	Not applicable	2 months	10 producer families.	The project's objective was to assist in the development through learning activities, of a sweet potato producer network to enable them to better supply customer needs. Project did not proceed due to lack of producer interest once project plan was developed.

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Queensland wide	31. Australian Bean Producers Alliance	Not applicable	To be determined	13 bean production businesses.	Project action plan currently being developed. Project seeks to bring like minded bean producers together in a producers alliance with the view to influencing supply patterns and development of best practice quality assurance procedures for Australian bean producers.
Interstate	32. Queensland/South Australian Producer Alliance Discussions	Not applicable at this stage	Ongoing	QFVG, Virginia Horticultural Institute and SARDI.	Series of meetings conducted to examine ways that producers from South Australia and Queensland can work more closely together to identify and exploit business opportunities to the mutual benefit of the producers of each state. Project is still proceeding without the direct input of the IDO
	33. Queensland/New South Wales Producer Alliance Discussions	Not applicable at this stage	Ongoing	QFVG, NSW Ag, Lachlan Valley Horticultural Network.	Project aims to identify how producers from each of the two states can work more closely together with the assistance of the IDO/relevant departments of agriculture/ and commercial interests. This project has only recently commenced.

* Supplementary application assistance provided by QFVG's Market and Business Development Application Service

** \$19,750 is the total project funding.

*** \$20,375 is the total project funding.

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Table 2. VIDS Best Practice Projects (13)

Region	Project Name and Number	Funding
<i>Fassifern</i>	5. Fassifern Packers Business Applications	\$50,000
Lockyer, Gympie, NQ	7. Bean Prepacking Research Alliance	\$19,750
Lockyer, NQ	8. East Coast Bean Alliance	\$20,375
Lockyer	11. Eco Foods	\$276,000
Sunshine Coast	14. Sunshine Coast Future Focus	\$2,000
Gympie	15. Gympie Local Producer Association	\$7,650
Gympie	16. Gympie Packhouse Redevelopment	\$47,280
Gympie	17. Best Practice Bean Handling Project	\$21,000
Gympie	18. Gympie Packhouse Marketing Development	\$20,650
Bundaberg	20. South Burnett Small Crop Growers Alliance	\$15,000
NQ	23. Gumlu Producers Alliance	\$21,375
FNQ	26. Atherton Tableland Future Focus	\$2,000
FNQ	27. Mareeba Future Focus	\$2,000
	Total Funding	\$505,080

Table 3. VIDS Best Practice Non-funded Projects (11)

Region	Project Name and Number
Granite Belt	1. Kool Country Packers Ballandean
Granite Belt, Lockyer	3. Wombok to Japan
Fassifern	4. West Farms Grower Network
Fassifern	6. Environmentally Safe Produce
Lockyer	9. Valleyfresh
Lockyer	10. Beetroot Alliance
Lockyer	12. Lockyer Valley Export Group Alliance Development
Bundaberg	19. Bundaberg Food Processing Park
Mackay	21. Mackay Local Producers Association

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North Qld	22. Qld Capsicum Producers Alliance
Far North Qld	25. Qld Taro Alliance

Table 4. VIDS Best Practice Projects at Proposal Stage or Waiting for Approval (8)

Region	Project Name and Number
Granite Belt	2. Development of Disease Forecasting Models
Fassifern	5.* Fassifern Packers Business Applications (elements of project waiting funding approval)
Lockyer	11.* Eco Foods (elements of project waiting for funding approval)
Burdekin/Ayr	24. Cucurbit Prepackaging Resarch Project
Brisbane Metro	28. Asian Vegetables Product Development
Queensland wide	31. Australian Bean Growers Alliance
Interstate	32. Qld/SA Producer Alliance Discussions
Interstate	33. Qld/NSW Producer Alliance Discussions

* (projects have already received partial funding)

Table 5. VIDS Best Practice Projects not Implemented (3)

Region	Project Name and Number
<i>Sunshine Coast</i>	13. Choko Producers Alliance
Brisbane Metro	29. Red Coral Lettuce to Japan
Northern NSW	30. Sweet Potato Producers Alliance

Table 6. VIDS Best Practice Projects completed to date (9)

Region	Project Name and Number
Granite Belt	1. Kool Country Packers Ballandean
Fassifern	4. West Farms Grower Network
Fassifern	6. Environmentally Safe Produce
Sunshine Coast	14. Sunshine Coast Future Focus
Gympie	15. Gympie Local Producer Association

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Gympie	16. Gympie Packhouse Redevelopment
Mackay	21. Mackay Local Producer Association
Far North Qld	26. Atherton Tableland Future Focus
Far North Qld	27. Mareeba Future Focus

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Table 7. VIDS Best Practice Project Description and IDO Involvement

Project Type	Project Name and Number	Region	Best Practice	Chain Alliance	IDO Involvement
Business Planning (Future Focus)	14. Future Focus Sunshine Coast	Sunshine Coast	✓		Application writing, course facilitation
	26. Atherton Tableland Future Focus	Far North Qld	✓		Application writing, course facilitation
	27. Mareeba Future Focus	Far North Qld	✓		Application writing, course facilitation

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Research – Production	2. Development of Disease Forecasting Models	Granite Belt			Application writing
Research – Prepackaging	24. Cucurbit Prepackaging Research	Burdekin/Ayr			Application writing
Alliance –Export	3. Wombok to Japan	Granite Belt and Lockyer	✓	✓	Co-ordination and facilitation, research
	12. Lockyer Valley Export Group Alliance Development	Lockyer	✓	✓	Facilitation
Alliance –Retail	4. West Farms Grower Network	Fassifern		✓	Facilitation
	8. East Coast Bean Alliance	Lockyer, NQ		✓	Application writing, facilitation, research
	11. Eco Foods	Lockyer	✓	✓	Application writing, facilitation, research
	28. Asian Vegetables Product Development	Brisbane Metro	✓	✓	Facilitation
Alliance –Business Operations and Procedures	1. Kool Country Packers Ballandean	Granite Belt	✓		Facilitation, research
	16. Gympie Packhouse Redevelopment	Gympie	✓		Application writing, facilitation
	5. Fassifern Packers Business Applications	Fassifern	✓	✓	Application writing
Alliance – Processing	7. Bean Prepackaging Research Alliance	Lockyer, Gympie, NQ	✓	✓	Application writing
	10. Beetroot Alliance	Lockyer	✓	✓	Facilitation
Alliance –Marketing	18. Gympie Packhouse Marketing Development	Gympie	✓	✓	Application writing, facilitation
	20. South Burnett Small Crop Growers Alliance	Bundaberg	✓	✓	Application writing, facilitation
	23. Gumlu Producers Alliance	NQ	✓	✓	Application writing, facilitation

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Alliance –QA	6. Environmentally Safe Produce	Fassifern	✓		Facilitation
	31. Australian Bean Producers Alliance	Qld wide	✓	✓	Facilitation
Alliance – General	9. Valleyfresh Ltd	Lockyer			Facilitation
	15. Gympie Local Producer Association	Gympie	✓		Application writing
	17. Best Practice Bean Handling Project	Gympie	✓		Application writing
	19. Bundaberg Food Processing Park	Bundaberg	✓		Presentation
	21. Mackay Local Producer Association	Mackay			Presentation
	22. Qld Capsicum Producers Alliance	NQ			Facilitation
	25. Qld Taro Alliance	FNQ	✓		Facilitation
	32. Qld/SA Producer Alliance Discussions	Interstate			Participation/facilitation
	33. Qld/NSW Producer Alliance Discussions	Interstate			Facilitation

Feedback

Please circle:

1. How useful did you find this meeting?

Not Very
Useful

Unsure

Useful

Very Useful

Comment:

2. Did you learn anything new?

YES

NO

UNSURE

Comment:

3. Will you follow up any new information from this workshop?

YES

NO

UNSURE

Comment:

4. How can the meeting be improved?

5. Please indicate your occupation.

Grower		Seed Co Rep	
Research Scientist		Crop Consultant	
Extension Officer		Processing Co Rep	
Ag Supplies Reseller e.g. Primac		Marketing Agent Rep	
Transport Co Rep		Supermarket Rep	
Local Government		Other: please specify	
		Employment consultant	

6. Any further comments?



**Vegetable Industry Development Service (VIDS)
Project VG98121**

EVALUATION

By
Ray Russell
&
Kerry Bell
For

HAL & QFVG



Horticulture Australia



July 2002

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SUMMARY

The Vegetable Industry Development Service – Northern Australia Project (VIDS Project) was developed by the Queensland Fruit and Vegetable Growers (QFVG) and funded through Horticulture Australia Limited (HAL). The Project was designed to contribute towards building profitability and economic, social and environmental sustainability of the Australian Vegetable Industry through the facilitation of sub-projects that will deliver targeted information and technology. The sub-projects were aimed at enhancing the performance of vegetable-growing businesses through motivating information and technology take-up, and through motivating continuous improvement.

The VIDS Project period was from July 1999 through to June 2002. Funding is pending for an additional year for the Project to take it through to June 2003.

The objectives of this evaluation were:

1. To evaluate the effectiveness of the VIDS Project's outputs and activities at the grower level; and
2. to provide recommendations for future direction of the VIDS Project.

In consultation with the VIDS Project team, two survey instruments were designed to gather data: 1. Survey of vegetable growers in Northern Australia for the VIDS Project; and 2. Survey of participants in the Market and Business Development Service (MBDS) activities provided by the VIDS Project.

The surveys were conducted via a series of telephone interviews with the growers and other stakeholders. For the general grower survey, 100 growers were selected from the QFVG grower list using a stratified random sampling method on a regional basis. A total of 10 respondents were selected by QFVG for the survey of participants in the MBDS activities. The respondents were chosen to represent a broad range of project objectives and different roles of the IDO. It was the decision of the VIDS Project team not to include the Northern Territory region in either survey, due to the time limitation and the majority of the growers in the region being non-English speaking or have English as a second language only. A telephone interview conducted by Julia

Telford (VIDS Project IDO) with Ms Kim Bui (Communications Officer in the region) is presented in the report.

The key recommendations resulting from this evaluation are:

1. Greater interaction with other industry service providers (including QDPI, NSW Ag, NTDPI&F, private consultants) be utilised to broadcast the services and activities of the VIDS Project available to growers.
2. The Vegetable Database continues to be updated and the service promoted to the industry as this service has the potential to deliver the desired outcomes of the project in terms of provision of up-to-date and targeted information.
3. Other means of information access needs to be explored for growers who do not have Internet access or wish to use the Internet.
4. The MBDS is highly recommended as a service that should be continued to be promoted and implemented as the service is delivering on the desired outcomes of the project.
5. Regular reporting of the projects undertaken by the MBDS should be disseminated in the relevant industry publications.
6. As newsletters appear to be most favoured means of communication by the growers, it is recommended that a specific VIDS Project newsletter be disseminated in QFVG News. The current 'Vegetable News' could be renamed for such purpose.
7. All presentation material used when delivering to people from non-English speaking backgrounds should be translated and evaluations of the activities should be undertaken. This is seen as being of particular importance in the Northern Territory region.

1.0 INTRODUCTION

1.1 Background to the Vegetable Industry Development Service – Northern Australia Project (VIDS)

The VIDS Project was developed by the Queensland Fruit and Vegetable Growers (QFVG) and funded through Horticulture Australia Limited (HAL), previously known as Horticultural Research and Development Corporation (HRDC) from the National Vegetable Research and Development levy. The Project was designed to contribute towards building profitability and economic, social and environmental sustainability of the Australian Vegetable Industry through the facilitation of sub-projects that will deliver targeted information and technology as well as market and business development. The sub-projects were aimed at enhancing the performance of vegetable-growing businesses through motivating information and technology take-up, and through motivating continuous improvement – goals shared with the Australian Government and the Australian Vegetable Industry. The project was developed in line with HAL and AUSVEG Australian Vegetable Industry Development Plan (HRDC and AUSVEG, n.d.).

The VIDS Project period was from July 1999 through to June 2002. Funding is pending for an additional year for the Project to take it through to June 2003.

1.2 VIDS Project Goal and Objectives

The VIDS Project has been developed in line with the Australian Vegetable Industry Development Plan. To this end it is envisaged that the outcomes of the VIDS Project will contribute to the broader goal:

To enhance the capability of Northern Australian vegetable producers through improved communication, delivery of programs and collaboration within an industry that is profitable, sustainable and market driven.

The VIDS Project Goal is defined as:

To facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable

producers enabling access to the required resources for improved industry performance.

The three objectives of the VIDS Project are:

- ❖ *To determine the Northern Australian Vegetable Industry information and technological needs.*
- ❖ *To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.*
- ❖ *To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.*

The outputs and activities developed by the VIDS Project to meet the stated objectives are presented at Appendix A

1.3 Evaluation Objective

An Interim Evaluation of the VIDS Project was completed by the Rural Extension Centre (REC) in July 2001. The Interim Evaluation provided a logical framework matrix (logframe) of the VIDS Project's objectives, outputs and activities (see Appendix A and B). The outputs and activities were then evaluated in relation to the stated objectives of the Project. The Interim Evaluation provides an explanation of the methodology used and the assessment of the activities of the Project at that time and should be read in conjunction with this report.

The Interim Evaluation primarily focused on the physical make-up of the VIDS Project's activities and outputs from the aspect of the provision of services and activities. Russell and Coutts (2001) noted:

The ultimate success of this highly participatory project will depend on the impact that implementation of the project has on the producers themselves.

It is not the purpose of this evaluation to reevaluate the design of the outputs and activities, but to evaluate the *effectiveness* of the VIDS Project from the growers' perspective.

The objectives for this evaluation are:

1. to evaluate the effectiveness of the VIDS Project's outputs and activities
at the grower level; and
2. to provide recommendations for future direction of the VIDS Project.

2.0 METHODOLOGY

This evaluation is based on a modified version of Bennett's Hierarchy. Bennett's Hierarchy is an evaluation framework used to depict the hierarchy of objectives towards a change in attitudes and practices of the participants in a program. The hierarchy is diagrammatically illustrated below in Table 1.

Table 1. Bennett's Hierarchy

Bennett's Hierarchy Level	Measurable Indicators.
7. END RESULTS	Social economic, environmental and individual consequences of the program
6. PRACTICE CHANGE	Adoption and application of knowledge, attitudes, skills, or aspirations.
5. KASA CHANGE	Knowledge – What do you know? Attitudes – How do you feel? Skills – What can you do? Aspirations – What would you desire?
4. REACTIONS	Degree of interest, like or dislike for activities, perceptions of the project.
3. PEOPLE INVOLVEMENT	Number of people reached, characteristics of people, frequency and intensity of contact
2. ACTIVITIES	Workshops, interviews, discussion groups, media releases etc.
1. INPUTS	Staffing and resources used.

Source: Adapted from Bennett (1997).

The logic is that there is a natural progression from the lower to the higher levels of the hierarchy. If adequate resources are provided and the planned activities are undertaken at a high level, then it can be argued that the higher level objectives have a strong likelihood of success. Alternatively, if the resources are inadequate and the activities are not undertaken, or poorly undertaken, then there is little point looking higher in the hierarchy for project success.

As previously stated, the Interim Evaluation focused on the physical make-up of the Project's activities and outputs from the aspect of the provision of services and activities. To this extent the Interim Evaluation adequately reported on the first three levels of the hierarchy. Evaluation of Level 4 indicators was limited to particular activities where participant feedback sheets were provided. The purpose of this evaluation is to analyse the Project's performance from Level 4 upwards through to Level 6 of the hierarchy for the

general grower survey, and through to Level 7 for the participants in the Market and Business Development Service (MBDS) provided by the VIDS Project.

2.1 Methods

A series of telephone interviews were conducted with growers and other stakeholders. The disadvantages of telephone surveys include difficulty in contacting respondents and lack of lead time. The advantages of telephone surveys are that they can be undertaken in a short time period, produce a high response rate and can cover all regions involved in the project. They can also provide comparative information between regions.

The survey instruments were developed in consultation with the VIDS Project team members. Two surveys were designed:

1. Survey of vegetable growers in Northern Australia for the VIDS Project.
2. Survey of participants in MBDS activities provided by the VIDS Project.

The surveys are attached at Appendix C and D.

The first survey was designed to capture the response from growers to the VIDS Project's information dissemination activities, specifically in terms of awareness, knowledge and change in management practices. 100 growers were surveyed from the QFVG grower list. The growers were selected using a stratified random sampling method on a regional basis. The proportion of growers randomly chosen from each region, were weighted on the total income from the region. The survey design used both qualitative and quantitative methods to measure the benefits of the services provided by the VIDS Project to growers. Julia Telford (VIDS Project IDO) conducted the interviews.

The second survey was designed to capture the response from growers and other stakeholders to the Market Business Development Service (MBDS) activities provided by the VIDS Project. A total of 10 respondents were selected by QFVG. The respondents were chosen to represent a broad range of project objectives and different roles of the IDO. The REC conducted the telephone interviews.

It was the decision of the VIDS Project team not to include the Northern Territory growers in the general survey. The Northern Territory has therefore been discussed in a separate section (Section 3.3)

3.0 Survey Results

3.1 Survey of vegetable growers in Northern Australia for VIDS Project

A telephone survey was undertaken by Julia Telford at QFVG for the VIDS program during June 2002. The survey targeted a random sample of 100 growers from the QFVG growers list plus Northern NSW growers, stratified across regions so that the proportion of growers surveyed reflected the gross incomes for the regions. The Northern Territory growers were not included in the survey. The survey instrument is attached at Appendix C.

3.1.1 Demographics

Table 2 below shows the number of growers who completed the survey, the total number of growers in each of the regions who were eligible to receive VIDS services and available on the grower database, as well as the percentage of these growers surveyed. The estimated gross income and percentage for each of the regions is also given where available. Note that this is not the estimated gross income of the respondents but all growers.

Table 2 Gross income and growers for regions and number of respondents in survey.

Region	Number of respondents	Total number of growers	% Growers surveyed	Gross Income (\$'000)
NNSW	5	24	20.8%	Not available
Darling Downs	5	135	3.7%	\$21,682 (5%)
Granite Belt	10	113	8.8%	\$39,108 (9%)
Lockyer Valley	25			
Lockyer Valley - Fassifern	4	156	18.6%	\$118,980 (29%)
Brisbane metro	3	84	3.6%	\$14,277 (3%)
Sunshine	4	139	2.9%	\$17,290 (4%)

Coast/Gympie		157	10.2%	\$58,645
Bundaberg	16			(14%)
Burdekin	13	113	22.1%	\$130,734
Bowen/Gumlu	12			(32%)
FNQ	3	29	10.3%	\$11,565 (3%)
Overall	100	950	10.5%	\$412,281 (100%)

The number of respondents in the survey generally reflected the percentage of gross income for each of the regions. Gross income was not available for Northern NSW, so the average percentage of growers surveyed across the Queensland regions (21.6%) was used to estimate the sample size.

98 of the 100 growers gave details of what their main crops were. There was a broad number of crops (51) noted, with the most frequently occurring being pumpkins (16), zucchinis (16), capsicums (15), potatoes (12), beans (11), chillies (10), onions (10), tomatoes (10) and cabbage (9). Appendix E lists the crops and how many growers nominated them as one of their main crops.

The respondents often listed more than one crop as their main crop/s. The number of main crops the respondents reported ranged from one to five (see Figure 1 below), with more than half (66 out of 98) having only one or two main crops.

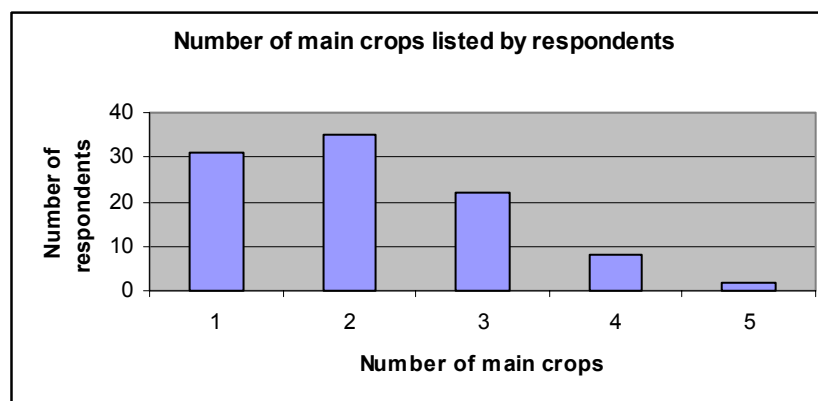


Figure 1. Number of main crops listed by respondents.

Seven respondents did not answer the question relating to area used for the purposes of vegetable production. The area per property was skewed, with over half the respondents having fewer than 20 hectares under vegetable production (see Table 3).

Table 3. *Area of production and number of respondents.*

Area of production	Number of respondents
0-5 ha	33
6-19 ha	19
20-49 ha	20
50-99 ha	12
100-149 ha	1
150-199 ha	2
200-499 ha	5
500-999 ha	1
Total	93

25 respondents chose not to reveal their gross annual income for an average financial year. The results from this question are presented below in Table 4.

Table 4. *Gross income for an average financial year*

Gross Income	Total
under \$25,000	25
\$25,000 - \$49,999	8
\$75,000 - \$99,999	5
\$100,000 - \$249,999	6
\$250,000 - \$499,999	12
\$500,000 - \$999,999	4
\$1 million - \$1,999,999	11
\$2 million - \$4,999,999	2
\$5 million - \$9,999,999	2
Total	75

Gross income has a highly skewed distribution. A third of the respondents who answered the question earn under \$25,000 gross. The next third earn up to \$500,000 with the remaining third earning up to \$10million.

A series of cross-tabulations were performed. The figures relating to gross income in relation to cropping area (presented in Figure 2 below), support the expected outcome of small cropping areas generating lower incomes. However, there were two growers with large cropping areas (≥ 20 ha) and low incomes and two growers with large incomes ($\geq \$1$ million) and small cropping areas (≤ 5 ha), reflecting the value of crops grown.

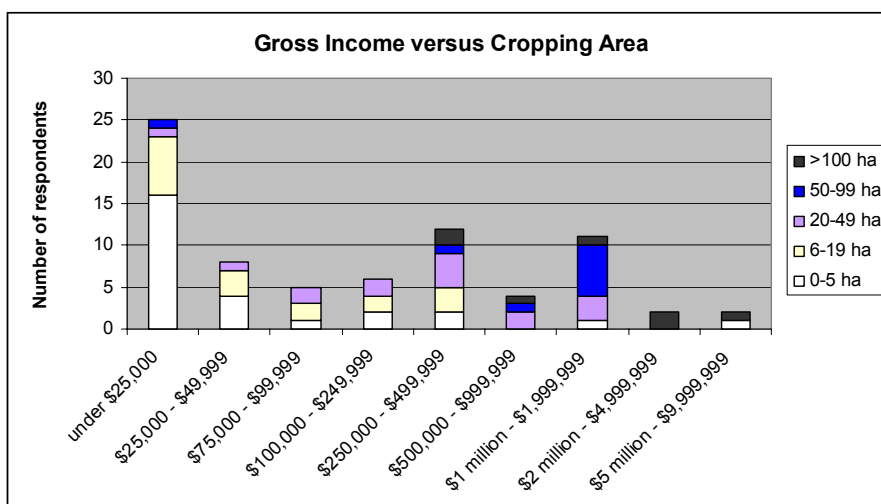


Figure 2. Gross income versus cropping area

Figure 3 below illustrates a comparison of cropping areas on a regional basis. The distributions of cropping areas appear similar across the regions. A chi-square test on combined categories of area and region showed no significant difference ($p > 0.05$) in the proportion of cropping areas across regions. The regions and cropping area needed to be combined to produce large enough counts for each category. Area was grouped into 0-5 ha, 6-50 ha and > 50 ha. Regions were grouped into: Lockyer Valley /Fassifern; Darling Downs; Granite Belt; Bowen/Gumlu; Burdekin; FNQ; Sunshine Coast/Gympie; Brisbane metro; NNSW and Bundaberg.)

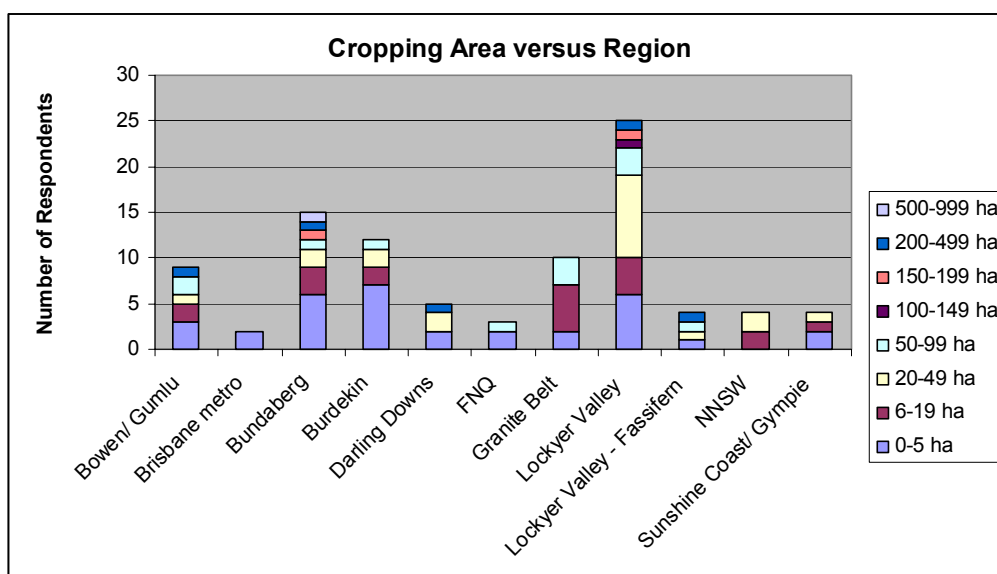


Figure 3. A comparison of cropping areas and regions

An approximate average gross income of respondents was calculated for each region by using the midpoints of each income category (see Figure 4 below). The Darling Downs region had the largest average income, calculated across 4 growers.

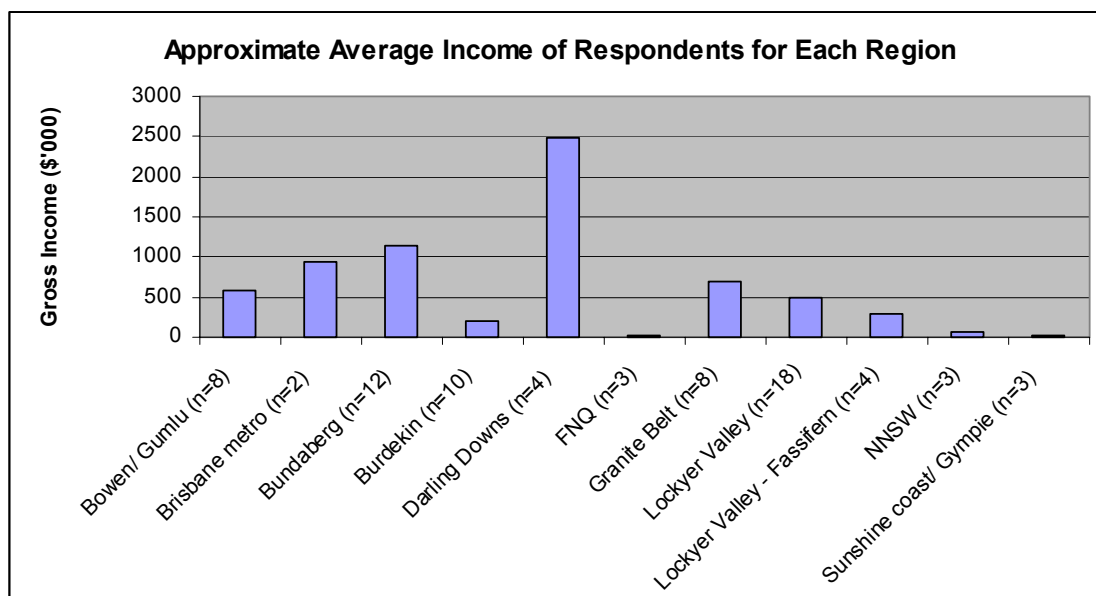


Figure 4. A comparison of average income on a regional basis

The average gross income of the respondents did not always reflect the gross income of the region, especially for Darling Downs and the Brisbane metro area, which seemed relatively high. This could be due to lower income respondents declining to answer the question or by the fact the random sample happened to contain higher gross income growers.

3.1.2 Information needs

The main areas where growers required information on a regular basis are presented in Figure 5 below. The major areas mentioned by growers were production (mentioned 51% of the time), followed by quality and marketing (12%), seed varieties (8%), crop management (6%), chemicals (4%), consumer demands (2%) and business and finance (1%).

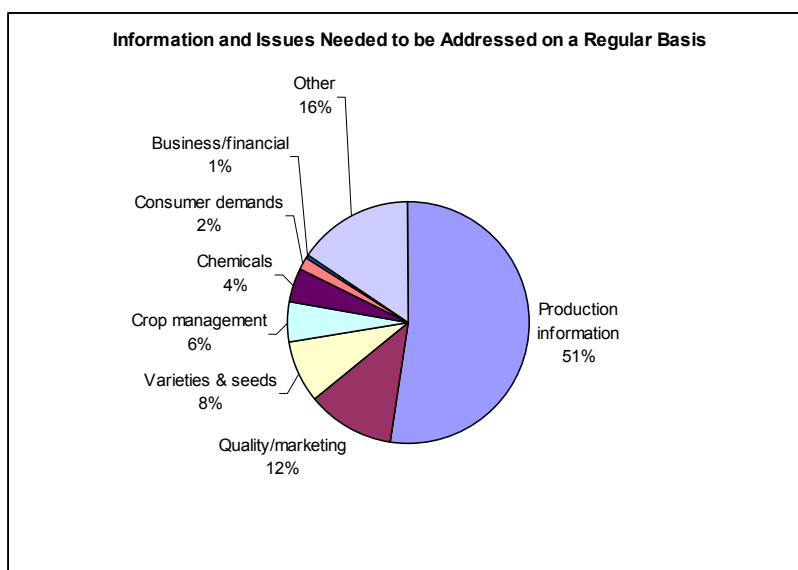


Figure 5. Information needs on a regular basis

Appendix E lists summaries of the type of information and issues the growers need to address and the ways they source them. Note that some growers addressed more than one type of information and/or source.

Table 5. Methods growers prefer to receive information

Receiving information	Number of respondents out of 100 (can pick more than one option)
Shed Meetings	4
Newsletter	91
One-on-one	6
Fax	16
Email	21
Workshops	1
Pamphlets	1

Newsletters seem to be the preferred option for receiving information, with email and fax also being favoured by many of the respondents.

3.1.3 Awareness of VIDS

Table 6 below illustrates the number of respondents who were aware of the various activities and services that were provided by the VIDS Project. As the

number of respondents was 100, the figures given also represent the percentage of growers who said that they were aware of the service.

Table 6. Awareness of services provided by the VIDS Project

Region	Vegetable database	Information workshops	Changing Face of Horticulture Workshops	Industry Development Officer (Information)	Industry Development Officer (Market development)
Bowen/Gumlu	5	2	1	5	7
Brisbane metro	2			2	1
Bundaberg	4	3	2	9	9
Burdekin	1		1	2	5
Darling Downs	2	2		4	1
FNQ					
Granite Belt	1			1	4
Lockyer Valley		1	2	4	9
Lockyer Valley - Fassifern					2
NNSW		5		4	1
Sunshine Coast/Gympie	2	1		1	1
Total	17	14	6	32	40

A relatively large proportion of the respondents were aware of the industry development officers and to a lesser extent aware of the changing face of horticulture workshops. Other services that were noted were: QFVG initiated projects such as Future Profit; off-label chemical registration; Water for Profit; and Water use efficiency.

Table 7 below, provides the responses to the sources of awareness of VIDS services.

Table 7 Sources of awareness of VIDS services

Source	Number of respondents out of 100
---------------	---

	(can pick more than one)
Vegetable News	1
QFVG News	36
Vegetable info database	0
GrowSearch	0
IDO's	13
DPI extension officers	0
Private consultants	0
Field days	1
Other	5

Other five sources of finding out about VIDS services were:

- ❖ farmers
- ❖ faxes
- ❖ word of mouth
- ❖ neighbours, and
- ❖ written correspondence.

3.1.4 Usefulness of VIDS services

The respondents were asked whether they were aware of the service and if so were asked to rate it. Some of the respondents who weren't aware of the service were given a description and asked to rate the service hypothetically. The rate scale was from 1 to 7 (1=no benefit, 7=significant benefit).

The values in the brackets are the number of respondents who gave a rating.

Table 8. Rating of the usefulness of VIDS services

	Vegetable database		Information workshops		Changing face of horticulture workshops		Industry Development Officer (information)		Industry Development Officer (market development)	
Region	Not aware	Aware	Not aware	Aware	Not aware	Aware	Not aware	Aware	Not aware	Aware
Bowen/ Gumlu Brisbane metro	4.0 (2)	3.3 (3) 4.5 (2)					4.7 (3)	5.9 (6) 6.0 (2)	4.5 (2)	6.5 (6) 5.5 (2)
Bundaberg	6.3 (4)	2.5 (7)	4.0 (1)	4.8 (4)	4.0 (1)	5.0 (2)	6.2 (5)	6.1 (9)	6.2 (5)	6.3 (8)
Burdekin	3.8 (4)	1.0 (1)		5.0 (1)		4.0 (1)	5.0 (7)	5.8 (4)	5.0 (7)	5.5 (3)
Darling Downs		6.5 (2)		5.2 (3)			5.0 (1)	5.7 (3)		2.3 (3)
FNQ	1.0 (1)						4.0 (1)		4.0 (1)	
Granite Belt	6.7 (3)	1.5 (2)	1.0 (1)		1.0 (1)		5.3 (6)	4.5 (4)	6.0 (5)	5.0 (4)
Lockyer Valley	4.1 (6)	2.3 (2)	3.5 (3)	5.0 (3)	4.0 (1)	3.5 (2)	4.7 (11)	5.1 (11)	4.6 (12)	5.5 (10)
Lockyer Valley - Fassifern	3.0 (2)	6.0 (1) 6.0 (1)		5.3 (4)			6.5 (2)	6.0 (1) 5.0 (4)	6.5 (2)	4.8 (2) 5.0 (2)
NNSW Sunshine Coast/ Gympie	3.5 (2)	5.5 (2)					6.0 (2)	6.0 (1)	6.0 (2)	6.0 (1)
	4.4 (24)	3.5 (23)	3.1 (5)	5.0 (15)	3.0 (3)	4.2 (5)	5.2 (38)	5.5 (45)	5.3 (36)	5.5 (41)
	4.0 (47)		4.6 (20)		3.8 (8)		5.4 (83)		5.4 (77)	

Individual comments made about the services are in Appendix E.

Vegetable database (47 respondents gave comments)

The main comments given by respondents who gave low ratings for the benefits of the vegetable database are based around themes of:

- ❖ no internet;
- ❖ no time;
- ❖ not interested;
- ❖ not good at using the Internet; or
- ❖ would prefer a pamphlet.

Those who gave higher ratings commented on it:

- ❖ being useful in providing good information (eg chemicals);
- ❖ it is a good idea; and
- ❖ haven't used it, but intend to use it in the future.

Information workshops (20 respondents gave comments)

Respondents who gave information workshops low ratings commented on themes such as:

- ❖ no time to go to workshops;
- ❖ not interested;
- ❖ don't like workshops; and
- ❖ would have preferred more interaction during workshops.

Those who gave higher ratings commented on:

- ❖ needing enough numbers at workshops;
- ❖ good source of ideas; and
- ❖ they like the interaction.

Changing Face of Horticulture workshops (8 respondents gave comments)

Comments ranged from:

- ❖ workshops not in area
- ❖ no time; and
- ❖ don't like workshops.

to:

- ❖ good for seeing people's faces

- ❖ needing to have enough interest/attendance; and
- ❖ workshop good with new ideas.

IDO - Information (83 respondents gave comments)

The comments relating to low ratings consisted of the themes of:

- ❖ don't know (benefit);
- ❖ no time/waste of time;
- ❖ don't need it;
- ❖ not interested;
- ❖ only useful for bigger growers; and
- ❖ better to talk to other growers.

The comments relating to the higher ratings consist of themes:

- ❖ good to find out what's going on;
- ❖ good but no time;
- ❖ good to have someone to help;
- ❖ don't use it but a good idea; and
- ❖ cover relevant/up to date information.

IDO - Market and Business Development (77 respondents gave comments)

The themes for these comments are similar to those given for IDO (information) and also include:

- ❖ only useful for larger growers;
- ❖ not as relevant when using an agent; and
- ❖ it is an important role.

3.1.5 Change in management practiced, sustainability and/or profitability

51 respondents stated that they had used at least one of the services. 42 of the 51 said that the services had made no impact on their management practices, sustainability and/or profitability. The other nine respondents provided comments for this section, giving 11 comments in total. The comments directly relating to services provided by the VIDS Project are highlighted in blue in Table 9 below.

Table 9. Growers' practice change

Service	Change in practice	Change in sustainability / profitability
Chemcert Chemical users	keeping spray diaries	loss of time
freshcare course	using tank and town water to wash vegetables	purchase of new tank and large excess water bills
IDO info on water for profit	invested in tensiometers	saved in water and better timing, saved\$\$
magazine	help with understanding pesticides	-
magazine	information of metham deregulation for soil	-
market IDO	understood more about the market - more handy for smaller growers	-
marketing assistance	not so much a change in on farm management, but it has influenced my thinking and understanding of markets	-
	- no has not changed ideas - grow, pack and keep an eye on his own product	-
	think that there is valuable info, but don't have the time or the energy at the moment to follow through with it	-
workshops	if you pick new things up, then you might use them, otherwise it doesn't change anything	-
-	tries to put into practice any new information that he can	-

3.1.6 Discussion of results from grower survey

The outputs and activities designed by the VIDS Project team (see Appendix A and B) appear in line with the information needs of growers. The survey revealed that information on production (51%) and marketing (12%) issues were the higher priority needs to be met (refer Figure 5 p.13). However, the preferred methods for receiving the information (refer Table 5 p. 13) is not through face-to-face contact and organized workshop style presentations, but via newsletters and electronic means of communication (email and fax).

The major information needs identified by growers relate to production and marketing issues.

Despite respondents having knowledge of the existence of the IDOs associated with the VIDS Project (32%- IDO information, 40% - IDO market and business development), a relatively low proportion were aware of the activities provided by the Project (see Table 6 p.14). Again a number of other services/activities were mentioned including Future Profit, off-label chemical registration and the Water Use Efficiency Initiative program. This could be due to the lack of recognition of the VIDS Project as the provider of the activities delivered under the Project.

Of the VIDS Project. Despite the recognition of the VIDS IDOs, there appears to be a low level of awareness among the growers of the services provided by the VIDS Project. At the services provided by the VIDS Project (see Table 7 p 14), the QFVG News remains the main awareness raising source (36 responses) and the IDOs themselves the next highest (13 responses). No responses were received for industry service providers such as DPI extension officers and private consultants. Service providers should be considered as beneficial collaborators, gaining access to growers and identification of regional issues.

The QFVG News and VIDS Project IDOs are the major awareness-raising source for the Project services among growers. Other industry service providers have the potential to increase the awareness level of the Project among industry participants

Table 8 p.15, presented the respondents' rating of the usefulness of the VIDS services. Apart from the Vegetable Database, all four other services provided by VIDS were rated higher by those who were aware of the service, compared with those respondents who had no previous knowledge of the service. Of the five services, the IDO service showed the highest level of awareness. The respondents who were either aware or not aware of the services rated the benefit of the IDOs the highest out of the five VIDS services listed, giving both IDOs an average overall rating of 5.4 out of a 1 to 7 rating scale (1=no benefit; 7=significant benefit).

The main comments from respondents giving a low rating to the Vegetable Database involved the respondent not having access to the internet, or do not use the internet. There appears to be potential for this service among the respondents.

Apart from the Vegetable Database, the services provided by the VIDS Project were rated higher by those growers who were aware of the service, compared with those who had no previous knowledge of the service.

There appears to be potential for the Vegetable Database as a seed

The main comments from respondents giving low ratings to the workshop activities were lack of time, not interested and don't like workshops. However those respondents who were aware of these activities rated them significantly higher than those who were not aware.

Changing Face of Horticulture	rating 3 (not aware)
	rating 4.2 (aware)
Information Workshops	rating 3.1 (not aware)
	rating 5.0 (aware)

It was interesting to see that only nine growers provided comments to section related to the impact of the VIDS Project's services, despite 51 respondents stating that they had used at least one of the services. The nine respondents provided 11 comments in total (see Table 9 p. 18). Of the 11 comments, only six related directly to the services provided by the VIDS Project, with four comments directed towards the Marketing and Business Development Service (MBDS) and two comments related to workshops.

Of the four comments related to the MBDS, three mentioned that it had provided an understanding of the market, but had not influenced a change in practice. The other respondent indicated that it had not influenced him as he 'grows, packs and keeps an eye on his own product'.

The two responses concerning the workshops generally indicated that they attempted to put into practice any information/knowledge gained.

51 respondents had used at least one of the services provided by the VIDS Project. 42 of the 51 stated that the services had made no impact on their operations. Of the 11 comments received from the remaining 9 respondents, 3 comments reflected Level 5 indicators (KASA change) of the Bennett's Hierarchy and 2 comments reflected Level 6 indicators (practice change), in a general sense only.

3.2 Survey of participants in Market Business Development activities provided by VIDS Project

A telephone survey of participants in various market business development projects was conducted by the REC. Contacts for the participants were provided by Shane Comiskey, the Marketing and Business Development Service (MBDS) IDO. 14 projects out of a total of 37 project initiated by the MBDS were nominated for inclusion in the survey. Of the 37 projects, one project is with growers in Northern NSW and one in the Northern Territory.

One respondent, Mulgowie Farming Company, was nominated as respondent for two projects (Wombok to Japan and the East Coast Bean Producers Alliance), but was only interviewed the once. The Gympie Pack House (GPH) participated in two projects (GPH Redevelopment and GPH Marketing Development). Two representatives were interviewed from GPH. Not all respondents were growers, but some service providers, such as researchers were also included. Some of the projects also included group businesses, and as such some growers answered in their capacity of a company director rather than as an individual grower. Therefore the demographic questions have little relevance.

Due to the small number of respondents, it is difficult to make general summations and the comments are presented individually. The results have been grouped under three headings:

- ❖ Growers
- ❖ Group Businesses
- ❖ Service Providers

3.2.1 Demographics

Table 10. Regional representation

Region	Growers& Project	Group Businesses & Project	Service Providers & Project
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Northern NSW		Qld/NSW Producer Alliance Discussions	
Darling Downs			
Granite Belt		Kool Country Packers Ballandean	
Lockyer Valley	Wombok to Japan & East Coast Bean Producers Alliance Qld Beetroot Alliance		
Lockyer Valley – Fassifern		Bunnybite Farms Sweet Potato Supply Chain to Japan	Fassifern Farm Diversification Program
Brisbane Metro	Asian Vegetables Product Development		
Sunshine Coast/Gympie		GPH Redevelopment GPH Marketing Development	Best Practice Bean Handling
Bundaberg	South Burnett Small Crop Growers Alliance		
Burdekin			
Bowen/Gumlu			
FNQ			
Northern Territory			
Interstate			Qld/SA Producer Alliance Discussions
Total	Growers – 4 Projects – 5	Businesses – 4 Projects – 5	Service Providers – 3 Projects – 4

The projects are mainly concentrated in the south-eastern area of Queensland (as far north as Bundaberg) and Northern New South Wales. This could be due to the high participatory nature of the projects and costs associated with travel to the more outer regions of Northern Australia. An interstate discussion group project between Queensland and South Australia has also been included in the survey.

Table 11. Major crops grown by respondents

Crop Types	Growers	Group Businesses	Service Providers
Carrots		✓	
Pumpkin		✓✓	
Sweet potato		✓	
Onions		✓	
Celery		✓	
Beans	✓	✓	✓
Zucchini	✓	✓	
Beetroot	✓		

Broccoli	√√		
Sweet corn	√√	√	
Eggplant	√		
Cucumbers	√√		
Chillies	√		
Okra	√		
Snakebeans	√		
Bittermelon	√		
Tomatoes		√	
Lettuce		√	
Cauliflower		√	
Cabbages		√	
Potatoes		√	
not applicable			√√

The crops listed in Table 11 demonstrate the diversity of the crops grown by participants in the MBDS projects.

Table 12. Respondents' cropping area

Area	Growers	Group Businesses	Service Providers
0 – 5 ha	√√	not applicable	not applicable
200 – 499 ha	√		
1000 or more ha	√		

Two of the growers had substantial areas under vegetable production in comparison with the respondents from the general grower survey.

Table 13. Respondents' gross income from vegetable production

Income Range	Growers	Group Businesses	Service Providers
\$25,000 - \$49,999	√		
\$50,000 – 74,999	√		
\$500,000 - \$999,999	√		
\$1million - \$1,999,999		√	
\$2million - \$4,999,999		√	
\$5million - \$9,999,999		√	
\$10million or over	√		
Not applicable		√	√√√

The income range for participants in the MBDS projects is greater than the growers included in the general grower survey. One grower is considered to be one of the highest earning vegetable producers in Northern Australia, with an annual gross income in excess of \$10million. Three of the group businesses all had annual gross incomes in excess of \$1million, and one group business is not a trading entity.

Table 14. Respondents' business structure

Structure Type	Growers	Group Businesses	Service Providers
Grower	√		not applicable
Grower-packer	√√		
Grower- packer-marketer	√		
Packhouse			
Packhouse and marketer		√√	
Processor		√	
Grower Association		√	

The grower with the largest area under production and highest gross income performed all the production system functions in-house (growing, packing and marketing). The group businesses comprised two who classified themselves as packhouse and marketer, one as a processor and the other as an incorporated grower association.

3.2.2 Awareness of MBDS provided by the VIDS Project

QB1 How did you hear about the services provided by the VIDS Project for market development?

Table 15. Method of awareness of MBDS

Method	Growers	Group Businesses	Service Providers
CFH Presentations		✓✓	
QFVG News	✓✓		
Vegetable News			
QFVG IDOs		✓✓	✓✓
Other	<ul style="list-style-type: none"> ❖ Grower information day – Gympie ❖ Regional Economic Development Officer 	Project Leader (2)	<ul style="list-style-type: none"> ❖ Project Leader ❖ Network ❖ Grower information day - Gympie

The QFVG News publication was given as the main method for awareness raising among the growers. The Changing Face of Horticulture (CFH) presentations were nominated twice by the group businesses. The VIDS Project members (IDOs and Project Leader) were the main method of awareness of the MBDS among the service providers, and also featured prominently with the group businesses. The grower information day at Gympie 'Growing for Profit' also rated two mentions.

QB2 For what reasons did you attend the CFH presentations?

Table 16. Respondents' reasons for attending CFH presentations

Reasons	Growers	Group Businesses	Service Providers
Did not attend	✓	✓	✓
Fellow presenter	✓		✓
Just getting to know different crops, what can be grown, marketing and find out how other people do business.	✓		
<i>To make the consumers and marketing groups (retailers etc.) more aware of the product and support the other growers.</i>	✓		
Keep updated with industry and aware of changes, if not in it you're behind		✓	
We were chasing funds for development		✓	
Networking and to keep up to date with industry			✓
It was an industry related activity		✓	
They were invited by our group to expose our		✓	

growers to what they were doing.			
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Three of the 12 respondents did not attend any CFH presentations. Of the nine who did, two were fellow presenters.

QB2 *How would you rate the content of the CFH presentations?*

(1=no benefit, 7=significant benefit)

Table 17. Rating of CFH presentation content

Rating	Growers	Group Businesses	Service Providers
1 (no benefit)			
2			
3			
4		✓	
5	✓✓	✓	
6	✓	✓✓	✓
7 (significant benefit)			✓
Not applicable	✓	✓	✓

The nine respondents who did attend the CFH presentations, rated the content of the presentations highly, with an overall rating of 5.5 out of a possible 7.

QB3 *What specific benefit were the presentations to you?*

(can choose more than one)

Table 18. Specific benefit of CFH presentations

Benefit	Growers	Group Businesses	Service Providers
Increased knowledge & awareness of marketing processes	✓✓✓	✓	✓✓
Awareness of assistance available to growers to enhance business operations	✓✓✓	✓✓✓✓	✓
An opportunity to discuss the direction of the vegetable industry	✓✓✓✓		✓
Presentations provided a stimulus to change current business practices	✓✓	✓✓✓✓	
Other	Confirmed what we were already doing		To get a feel for how the growers and the Project react to issues raised
No benefit			
Not applicable	✓	✓	✓

The major response from the growers was ‘an opportunity to discuss the direction of the vegetable industry’ (4 responses).

The group businesses viewed the main benefit from the presentations as providing ‘awareness of assistance available to growers to enhance business operations’ and ‘providing a stimulus to change current business practices’.

The major response from the service providers was ‘increased knowledge and awareness of marketing processes’.

QB4 Do you have any suggestions as to how the presentations could be improved?

Table 19. Suggestions for improving CFH presentations

Suggestions	Growers	Group Businesses	Service Providers
Encourage more people to come along, probably need to send personal invitations and follow up with telephone calls.	✓		
More hands-on presentations such as discussions, practical excursions.	✓		
Follow up with something else – it’s a start but the process is going to take a while.	✓		
timing/advertising – it was disappointing that more growers did not attend			✓
No, thought it was well done. Met our needs at the time.		✓	
No I think it was okay.		✓✓✓	
More frequent activities are required to access more growers and put a face to the industry service providers.			✓
Not applicable	✓	✓	✓

Suggestions for improving the actual content of the CFH presentations were mainly from the individual growers, suggesting more hands-on activities and discussions and follow-up activities. One grower and one service provider suggested that more growers should be encouraged to attend. Another service provider suggested more frequent activities are required to access more growers.

3.2.3 Advice/Assistance provided by the VIDS Project's MBDS

QC1 As you have participated in activities provided by the MBDS offered under VIDS, what category best describes the type of advice/assistance provided?

Table 20. Category of advice/assistance provided by MBDS

Advice/Assistance (and Bennett's Hierarchy indicator)	Growers	Group Businesses	Service Providers
Development of business plans (Level 6 and 7)	✓	✓✓✓	
Organisational structure (Level 6)	✓	✓	
Development/identification of supply chain linkages (Level 6 and 7)	✓✓	✓✓✓✓	✓✓
Development/identification of new business opportunities (Level 6 and 7)	✓	✓✓✓	✓✓
Obtaining business project funding (Level 6 and 7)	✓	✓✓✓✓	✓✓
Educational programs (Level 5)	✓✓		
Support in developing/maintaining grower groups (Level 5)	✓✓✓	✓✓✓✓	✓
Other			

The main service provided to growers was in the area of support and maintenance of grower groups. Whereas the group businesses and service providers responses were spread over a number of areas.

QC2 On a scale of 1 to 7, how do you rate the impact/benefit of the assistance from the MBDS on your operations (1=no benefit, 7 =significant benefit)?

Table 21. Rating of impact/benefit of assistance on respondents' operations

Rating	Growers	Group Businesses	Service Providers
1 (no benefit)			
2			
2.5			✓
3	✓✓		
3.5	✓		
4	✓		
5		✓✓✓	
6			✓
7 (significant benefit)		✓✓	✓
Overall	3.4	5.8	5.2

In total, the overall rating for all respondents is 5.3 out of a possible score of 7.

QC3 *What changes have you made to your business operations that are a result of your involvement with the MBDS provided by VIDS?*

The responses to this question are presented in Table 22 below. The respondent's response has been coupled with the rating they gave for the impact of the service on their operations.

Table 22. Operational changes resulting from involvement with the MBDS

Change to business operations (and Bennett's Hierarchy indicator)	Growers		Group Businesses		Service Providers	
		Rating		Rating		Rating
None, other than becoming involved in a grower group (Level 5)	✓	3				
We are now trying to do more in-house and use consultants less (Level 6).	✓	3				
Not a lot at this stage. We have had other things to come out of it like Water for Profit and we have done the four workshops – Shane introduced us into that (Level 5)	✓	4				
None, we would like to be involved, but we have not yet found a suitable vehicle (Level 5).					✓	2.5
A lot more efficient on producing and packing produce, more educational focused with our staff and working towards improving our product (Level 5 & 6)	✓	3.5				
Gave GPH a better understanding of where losses occur and a number of growers have put into practice measures to reduce losses (Level 5 & 6)					✓	7
Discussions with potential business partners to expand our business base (Level 7).			✓	5		
Got the group working together by outside facilitators coming in. Working with networking with growers from other areas to develop super market products. Because of all that, we are now a growing business (Level 6 & 7).			✓	7		
Better outlook on our marketing side of things. We have identified new products and are better prepared to tackle the future (Level 6 & 7).			✓	7		
Helped me define certain directions and was a good source to provide some input and gain knowledge from other sources (Level 5 & 6).					✓	6
We were able to start the business and now know where to go for information and assistance (Level 5, 6 and 7).			✓	5		

Vegetable Industry Development Project (July 1999 – June 2002)
Evaluation Report July 2002.

We are trying to pull a group of growers together and promote the MBDS among the group (Level 5 & 6)			√	5		
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3.2.4 Future activities of the VIDS Project's MBDS

QD1 As a grower/group business/service provider, what services do you require in terms of market and business activities for your operations?

Table 23. Services required for market and business activities

Service (and Bennett's Hierarchy indicator)	Growers	Group Businesses	Service Providers
Facilitation of grower groups (Level 5)	✓✓		
Help with expanding into new markets and export (Level 6 & 7).	✓✓	✓	
Help growers keep up to date with markets (Level 5).	✓	✓	
Identify areas where significant benefits can be made and coordinate projects (Level 5, 6 & 7)			✓
Supply chain linkages (Level 7)		✓✓✓✓	
Assistance in accessing funding (Level 1 for Level 6 & 7 output)		✓	✓
Assistance in electronic marketing (Level 5 & 6)		✓	
Identification of potential areas for collaboration (Level 5)			✓
Extension – like to see people out on properties (Level 3)			✓

The major responses from the growers were 'facilitation of grower groups' and 'help with expanding into new markets and export'. The major response from group businesses was assistance in developing/identifying supply chain linkages. The responses from the service providers mainly centred around project development and one comment related to extension activities in general.

QD2 In general, what services do you think should be provided by a Market Business Development Service?

Table 24. Respondents' preferences for services provided by a MBDS

Service (and Bennett's Hierarchy indicator)	Growers	Group Businesses	Service Providers
<i>Along the lines of what they have been doing. The cost effectiveness of the implementation is a QFVG issue. The only negative point is that at the start, there should be clarification of what they can actually do for you and who pays etc.</i>	✓		
Facilitator of grower groups (Level 5)	✓		
Know the market trends and enable growers to access to the reports (even through internet) (Level 5)	✓		
Consumer needs and preferences. Always looking for new crops to fill the niches (Level 5)	✓		
Marketing assistance – new business opportunities, expand markets, new markets, export (Level 5 – 7)	✓	✓✓✓	
Project development and project coordination (Level 1 for Levels 6 & 7 output)			✓
Funding to develop the business (grants etc.) (Level 1 for Levels 6 & 7 output).		✓	✓
Provide growers with at-the-shoulder assistance (specific assistance for identified needs) – how to take the next step (Levels 5 – 7).			✓✓
Educational programs targeted to specific needs of producers Level 5).		✓	
Linkages – unless we work together to build competitive advantage we will not survive (Level 5 & 6)		✓	

There were three responses from the growers relating to marketing assistance (see grouping above). The major need identified by the group businesses respondents related to marketing assistance, particularly in the areas of new business opportunities, expanding markets, identification of new markets and export opportunities. Again there were two comments from the service providers relating to project development and coordination. The other two comments from service providers related to providing the grower with 'at-the-shoulder assistance', specific assistance for specific needs. As one service provider stated a lot of the growers are 'trained out and rather than running more general workshops, they need help in how to take that next step to improve their business opportunities'.

QD3 Do you have any further comments?

Table 25. Other comments.

Comments	Growers	Group Businesses	Service Providers
Basically Shane has done a fairly good job. I have only commented really on the Bean alliance, which has not progressed. The Wombok to Japan business was also not a success. Shane just found a buyer and just pointed him in our direction. We should have been more aware of their lack of professionalism.	✓		
Appreciate the professional manner in which Shane conducts the service. It is good value.		✓	
<i>One of the best services from QFVG and it is a service that they should be providing.</i>		✓	
Shane is very knowledgeable, easy to get along with, a good negotiator. Hope he keeps going.			✓
A worthwhile program		✓	

3.2.5 Discussion of results from survey of participants in MBDS provided by the VIDS Project

Due to the small number of respondents in the survey, no useful generalisations can be made from the demographic information.

The resources used to generate awareness among the interest groups in the MBDS are presented in Table 15. The QFVG News, the CFH presentations and contact with members of the Project team appear to be the best methods for this communication.

Table 16, 17, 18 and 19 related to the CFH presentations.

The reasons for attending the CFH presentations given by the eight who did attend, centred around increasing knowledge and awareness of the industry (level 5 indicators on the Bennett's Hierarchy scale)

The content of the CFH presentations was rated highly by the eight respondents with an overall rating of 5.5 out of a possible 7.

Table 18 provides the responses to the specific benefit of the CFH presentations.

The specific benefit of the CFH presentations to the growers and service providers reflect level 5 indicators of Bennett's Hierarchy (KASA change). The major response from the group businesses, however reflect a higher order on the hierarchy with the major responses showing level 6 indicators (practice change)

Table 20 presented the responses to the type of advice/assistance provided to the respondents by the MBDS. The categories of Bennett's Hierarchy indicators are also noted on the table and range from Level 5 through to Level 7. Although project funding could be considered as a Level 1 indicator (input level). It is acknowledged that the funds would be directed towards a project to enhance business operations, therefore lifting it to Level 6 and 7 of practice change and end results.

The major response from growers reflects Level 5 indicators on Bennett's Hierarchy (KASA change). Group businesses and service providers were mainly interested in the higher order of Level 6 (practice change) and Level 7 (end results).

Table 21 presents the respondents' rating of the impact/benefit of the assistance provided by the MBDS on the respondents' operations. If the ratings are pooled, the overall rating for the service is 5.3 out of a possible 7. However, if viewed in their groupings, the rating from individual growers is 3.4, group businesses rated the service as a 5.8 and service providers at 5.2.

The relatively low rating of the MBDS to the individual growers can be due to the nature of the projects in which they participated, which were largely aimed at Level 5 indicators (KASA change), whereas the group businesses were involved in projects specifically targeted towards each group's business activities, therefore directed to the higher order levels of Bennett's Hierarchy.

Table 22 shows the respondents' comments on the operational changes resulting from their involvement with the MBDS provided by the VIDS Project.

The comments received from the respondents concerning operational changes resulting from involvement with the MBDS all reflect Level 5 through to Level 7 indicators of Bennett's Hierarchy (KASA change – practice change – end result).

Two questions were asked relating to the future activities of the VIDS Project's MBDS – what services do they particularly require of the service and in a general sense, what services should a MBDS provide to participants.

The major responses to both questions relating to the future direction of the MBDS centred on the identification and development of marketing opportunities – reflecting Levels 5 through to Level 7 of Bennett's Hierarchy.

3.3 Comments on VIDs activities with the Northern Territory growers

It was the decision of the VIDS Project team not to include the Northern Territory region in the general grower survey as the majority of vegetable producers in the region are either non-English speakers or have English as a second language. The timing of the evaluation, precluded any reasonable expectation for the survey to be translated and secondary sources used for data collection. Comments relating to the work implemented in the region are restricted to a brief interview conducted by Julia Telford (VIDS Project IDO) with Ms Kim Bui (Vietnamese Communication Officer in the region) and Shane Comiskey's report on activities in the region to date.

Julia Telford's transcript of the interview:

“The work that is being done by the IDOs in Queensland is not always applicable to growers in the Northern Territory due to the different vegetables grown up there and different grower requirements.

The idea of the IDO role is a beneficial one, and one that is needed in the Northern Territory as well, however she believes that it is more important to have someone based in the Northern Territory. That way growers have access to the IDO more regularly and the information is more relevant and specific to their information needs.

In relation to Sam and Shane (VIDS Project IDOs), she said that the information that she receives via the communication network is great and that she would otherwise not hear about this, while the work that Shane has done recently with the packing shed has been well received.

Sam has been involved with the translation of a DPI booklet from English into Vietnamese, and this translation is complete, with the booklet being distributed by compact disc to IDOs in the other states, as well as to the NTDPF. There are also two posters on pest and disease that have been prepared, these are in their final stage and will be available soon.”

Shane Comiskey's input in the region is as follows:

- ❖ Delivered a Changing Face of Horticulture presentation to the Asian Vegetable Association (22 growers attended).
- ❖ During that visit a number of meetings with DPITF staff as to how the MBDS could best be utilised in the region.
- ❖ Six meetings were held with individual Asian vegetable growers in the region about the services being provided by the MBDS, with specific reference to the growers' attitudes toward being involved in a central packing facility.
- ❖ A second trip was made to the region as a follow-up to the idea of establishing a central packing facility. Discussions were held with a group of Asian vegetable growers (8 – 10) interested in the idea. Discussions revolved around identifying what it is the group wished to achieve and then to outline the process that they needed to follow in order to achieve their aims. From this an action plan was developed.
- ❖ During the second trip the CFH presentation was given to the whole membership of the Northern Territory Horticultural Association (52 growers attended).

- ❖ The aim of the third visit was to encourage the involvement of other supply chain partners in the ‘Asian Vegetable Central Packhouse’ project and to gain commitment from each of the prospective partners. The project participants now have a clearly defined process to proceed with development of the project. The project is currently on hold until the completion of the 2002 season.
- ❖ During the third visit a meeting was held with two organizations, a group of organic vegetable (and fruit) producers and the Australian Commercial Bamboo Corporation, with the view to a future CFH presentation to those groups.

Since the Interim Evaluation, a number of visits and activities have been conducted with growers in the Northern Territory region, however no evaluation of the impact of the activities can be made.

4.0 CONCLUSION AND RECOMMENDATIONS

The objectives of this evaluation were:

1. to evaluate the effectiveness of the VIDS Project's outputs and activities at the grower level; and
2. to provide recommendations for future direction of the VIDS Project.

The methodology of the evaluation was based on a modified version of Bennett's Hierarchy, an evaluation framework used to depict the hierarchy of objectives towards a change in attitudes and practices of the participants in a program.

In consultation with the VIDS Project team, two survey instruments were designed to gather data:

1. Survey of vegetable growers in Northern Australia for the VIDS Project.
2. Survey of participants in the Market and Business Development (MBDS) activities provided by the VIDS Project.

The surveys were conducted via a series of telephone interviews with the growers and other stakeholders. For the general grower survey, 100 growers were selected from the QFVG grower list using a stratified random sampling method on a regional basis. The proportion of growers randomly chosen from each region, were weighted on the total income from the region. The survey design used both qualitative and quantitative methods to measure the benefits of the services provided by the VIDS Project to growers. A total of 10 respondents were selected by QFVG for the survey of participants in the MBDS activities. The respondents were chosen to represent a broad range of project objectives and different roles of the IDO.

It was the decision of the VIDS Project team not to include the Northern Territory region in either survey as the majority of vegetable producers in the region are either non-English speakers or have English as a second language. The timing of the evaluation precluded any reasonable expectation for the survey to be translated and secondary sources used for data collection. Comments relating to the work implemented in the region are restricted to a brief interview conducted by Julia Telford (VIDs Project IDO) with Ms Kim Bui (Vietnamese Communications Officer

in the region) and Shane Comiskey's report on activities in the region to date. Although the reasons for non-inclusion of the region in the surveys is accepted by the evaluation team, it is disappointing that the growers' comments could not be included to provide some direction for the future program activities in this marginalised region. It is also disappointing to note that no evaluation of the regional activities have been conducted, despite a recommendation from the Interim Evaluation for evaluations to be conducted for all activities. The MBDS has also been active in the region, with the development of a project for a central pack house facility, and again it would have been beneficial to receive feedback from the participants as to their reaction to the perceived impact of the project to date.

The major findings from the general grower survey were:

- ❖ The outputs and activities designed by the VIDS Project team appear in line with information needs of growers which were identified as being production (51%) and marketing (12%).
- ❖ There appears to be a low level of awareness among the growers of the range of services and activities provided by the VIDS Project.
- ❖ The QFVG News and the VIDS Project IDOs are the major awareness-raising source for the Project services among growers. Other industry service providers have the potential to increase the awareness level of the Project's services among industry participants.
- ❖ The IDOs were rated as being the most useful of the VIDS Project services.
- ❖ There appears to be potential for the Vegetable Database as a good delivery mechanism, providing up-to-date information to growers.
- ❖ 51 respondents (51%) had used at least one of the services provided by the VIDS Project. 42 of the 51 stated that the services had made no impact on their operations. The remaining 9 respondents, 3 comments reflected Level 5 indicators (KASA change) of the Bennett's Hierarchy and 2 comments reflected Level 6 indicators (practice change), in a general sense only.

Despite 51% of the growers surveyed having used at least one of the services, only 5 comments related to any impact on the growers' KASA or practice change (Level 5 and 6 of the Hierarchy). This seems to reflect the general nature of information

dissemination services having an indirect contribution to recipients' change in attitudes and practices.

The MBDS is more directed at specific goals of the participants and therefore indicates a more direct relationship between the service provided and changes in participants' attitudes and practices. The respondents were categorised as being either a) individual grower; b) group business; or 3) service provider. The major findings from the survey of participants in MBDS activities were:

- ❖ The type of assistance/advice provided to participants reflected Level 5 (KASA change) for growers and Level 6 (practice change) and 7 (end results) for the group business and service providers.
- ❖ The impact rating for the service on the operations of individual growers was 3.4 out of a possible 7. This relatively low rating appears to reflect the nature of the projects in which the growers were involved (mainly educational programs and producer groups – Level 5 KASA change).
- ❖ The impact rating for the service on the operations of group businesses was 5.8 out of a possible 7. The group business projects were specifically directed towards changes in each group's business activities.
- ❖ Service providers rated the impact of the service on their operations as 5.2 out of a possible 7. One service provider rated the service at 2.5, commenting that despite wishing to become involved in the program, nothing has come from the discussions to date.
- ❖ Specific comments received from all respondents concerning specific operational changes resulting from their involvement in the MBDS all reflect Level 5 through to Level 7 indicators of the Hierarchy.
- ❖ The major responses to the questions relating to the future direction of the MBDS centred on the identification and development of marketing opportunities, again reflecting Levels 5 through to Level 7 of the Hierarchy.

Recommendations

1. Greater interaction with other industry service providers (including QDPI, NSW Ag, NTDPI&F, private consultants,) be utilised to broadcast the services and activities of the VIDS Project available to growers.

- 2 The Vegetable Database continues to be updated and the service promoted to the industry as this service has the potential to deliver the desired outcomes of the project in terms of provision of up-to-date and targeted information.
- 3 Other means of information access needs to be explored for growers who do not have Internet access or wish to use the Internet.
- 4 The MBDS is highly recommended as a service that should be continued to be promoted and implemented as the service is delivering on the desired outcomes of the project.
- 5 Regular reporting of the projects undertaken by the MBDS should be disseminated in the relevant industry publications.
- 6 As newsletters appear to be most favoured means of communication by the growers, it is recommended that a specific VIDS Project newsletter be disseminated in QFVG News. The current 'Vegetable News' could be renamed for such purpose.
- 7 All presentation material used when delivering to people from non-English speaking backgrounds should be translated and evaluations of the activities should be undertaken. This is seen as being of particular importance in the Northern Territory region.

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APPENDIX A

OUTPUTS AND ACTIVITIES FOR VIDS PROJECT OBJECTIVES

Outputs and Activities for VIDS Project Objectives

<u>Objective</u>	<u>Outputs</u>	<u>Activities</u>
<u>Objective 1</u> To determine the Northern Australian Vegetable Industry's information and technological needs.	1.1 Needs analysis of the Northern Australian Vegetable Industry. 1.2 Economic analysis of the Northern Australian Vegetable Industry.	1.1.1 Develop and facilitate regional industry workshops to gather data for needs analysis from the Northern Australian Vegetable Industry participants and prepare reports. 1.1.2 IDOs conduct one-on-one farm interviews. 1.2.1 Conduct an economic survey of the Northern Australian Vegetable Industry and prepare report.
<u>Objective 2</u> To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.	2.1 Project proposals developed in collaboration with industry participants to specifically address the Northern Australian Vegetable Industry needs. 2.2 Case Studies of Best Practice for the Northern Australian Vegetable Industry developed from Best Practice projects. 2.3 Provision of additional services to enhance the business capability of producer groups within the Northern Australian Vegetable Industry. 2.4 Increased awareness	2.1.1 IDOs to participate in National Vegetable Research and Development meetings, collate state and regional needs and provide input into the Australian Vegetable Industry Plan. 2.1.2 Disseminate the Northern Australian Vegetable Industry needs report to industry. 2.1.3 Conduct a Research and Development workshop with industry researchers. 2.1.4 Provide assistance to industry participants to develop projects in response to the needs of the Northern Australian Vegetable Industry. 2.1.5 Provide an application writing service to assist industry participants to develop project applications and obtain funding for projects. 2.2.1 Establish Best Practice studies in each major production area of Northern Australia. 2.2.2 Assist Best Practice study participants to obtain project funding. 2.2.3 Work with Best Practice studies to achieve project outcomes and develop Best Practice case studies. 2.3.1 Identify the services or activities required by producers to enhance their business capabilities.

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OUTPUTS AND ACTIVITIES FOR VIDS PROJECT OBJECTIVES

	of industry participants of the issues relating to marketing and business opportunities in the Northern Australian Vegetable Industry.	<p>2.3.2 IDOs to provide assistance to industry participants to form Chain Alliances.</p> <p>2.4.1 Design and facilitate regional workshops ‘The Changing Face of Horticulture’ that will specifically address marketing and business issues beyond the farm gate and encourage industry collaboration in project development.</p> <p>2.4.2 IDOs facilitating networking among industry participants.</p>
<p><u>Objective 3</u> To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.</p>	<p>3.1 A continuous information updating process to service the needs of the Northern Australian Vegetable Industry participants.</p>	<p>3.1.1 Design information packages targeted to the needs of each production area.</p> <p>3.1.2 Develop and facilitate regional information workshops.</p> <p>3.1.3 Develop and facilitate a series of workshops ‘The Changing Face of Horticulture’ specifically addressing marketing and business beyond the farm gate which effects long term business viability.</p> <p>3.1.4 Develop a web-based information database targeted to the needs of the Northern Australian Vegetable Industry.</p> <p>3.1.5 Project team providing current information of projects and activities to the various reporting services available.</p>

APPENDIX B
VIDS Project Logical Framework Matrix

Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>BROADER GOAL To enhance the capability of Northern Australian vegetable producers through improved communication, delivery of programs and collaboration within an industry that is profitable, sustainable and market driven.</p>	<ul style="list-style-type: none"> • Australian Vegetable Industry participation in a collaborative network program • Increase in grower membership of State Vegetable Growers' Association. • Increased domestic consumption of Australian vegetables • Increased export sales of vegetables. • Australian Vegetable Industry meeting at least minimum Quality Assurance standards that satisfy consumer demands for quality and 	<ul style="list-style-type: none"> • AUSVEG Network Program reports detailing level of industry participation. • State Grower Association membership records • ABARE statistics • ABARE statistics • Industry Quality Assurance standards 	<ul style="list-style-type: none"> • Industry widely dispersed • Industry members have very little time for networking. • Low levels of trust and funding creates a competitive rather than collaborative environment. • Members are committed to the organisation and recognise the benefits of belonging. • Lack of industry cohesion in marketing. • Lack of collaboration for export and export effort is fragmented • Quality not viewed as consistently the same as global competitors. • Lack of communication and trust between value

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	<p>traceability.</p> <ul style="list-style-type: none"> • Formation of regional. Interegional and interstate vegetable grower chain alliances. 	<ul style="list-style-type: none"> • State and National reports. 	<p>chain participants</p> <ul style="list-style-type: none"> • Power of purchasing groups. • There is a need to have increased profitability of the whole of the vegetable chain, not just producers even though they are the only ones paying the levies.
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VIDS Project Logical Framework Matrix

Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>PROJECT GOAL To facilitate, coordinate and instigate projects targeted to meet the information and technological needs of Northern Australian vegetable producers enabling access to the required resources for improved industry performance.</p>	<ul style="list-style-type: none"> • Projects developed by the VID Project meet the needs of the Northern Australian vegetable producers. • Projects developed by the VID Project are aimed at improving the capability of producers in on-farm and post-farm gate activities • Established information network to service the Northern Australian vegetable industry. • Increase in gross margins achieved by Northern Australian vegetable producers. 	<ul style="list-style-type: none"> • Projects and the industry needs assessment report. • Project reports • VID Project reports • ABARE and Industry statistics. 	<ul style="list-style-type: none"> • Producers and industry feel the need to participate.

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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
OBJECTIVES 1.0 To determine the Northern Australian Vegetable Industry's information and technological needs.	<ul style="list-style-type: none"> • Industry needs articulated • Industry validation of needs 	<ul style="list-style-type: none"> • Resulting reports – VIDS Project team • Reports disseminated to industry and feedback received. 	<ul style="list-style-type: none"> • Industry participation in needs analysis. • Adequate response from industry may be hard to achieve due to time and lack of responsiveness.
4.0 To initiate actions, projects and the provision of services to address the Northern Australian Vegetable Industry needs and towards increasing the capability, competitiveness and market and business capacity of the industry participants.	<ul style="list-style-type: none"> • Projects developed in response to needs assessment. • Securing external funding for development and implementation of identified projects. • VIDS Project team assisting the development of projects in collaboration with industry participants. • Best practice studies established in each of the major production regions of 	<ul style="list-style-type: none"> • Evaluation of projects against needs assessment. • Proposal feedback from funding bodies. • Project proposals and reports. • VIDS Project reports. 	<ul style="list-style-type: none"> • Adequate funding available for projects in identified areas. • Growers are unaware of funding resources. • Low level of collaboration between industry participants. • Low levels of trust and awareness of process among group members.

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	<p>Northern Australia.</p> <ul style="list-style-type: none"> • Increase in the number of industry participants accessing the services and attending activities provided by the VIDS Project. 	<ul style="list-style-type: none"> • VIDS Project reports. 	<ul style="list-style-type: none"> • Slow adoption of new ideas by industry. • High maintenance input needed by co-ordinator. • Industry participants have less time to participate in activities.
5.0 To design a well-defined and workable information dissemination process to service the Northern Australian Vegetable Industry.	<ul style="list-style-type: none"> • Increase in the number of industry participants accessing information services provided by the VIDS Project. • Information available adequately addresses the needs of industry participants. 	<ul style="list-style-type: none"> • Records of web site and phone calls received. • Evaluation of information provided against needs assessment. 	<ul style="list-style-type: none"> • Low level of technology adoption among growers. • Information is presented in a useable form for industry participants.

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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>OBJECTIVE 1 OUTPUTS</p> <p>1.3 Needs analysis of the Northern Australia Vegetable Industry.</p> <p>1.4 Economic analysis of the Northern Australian Vegetable Industry.</p>	<ul style="list-style-type: none"> • Reports prepared identifying needs of the Northern Australian Vegetable Industry. • Validation of the needs by industry. • Report prepared describing the economic environment of the Northern Australian Vegetable Industry. 	<ul style="list-style-type: none"> • Workshop results and reports • Feedback from industry • Report 	<ul style="list-style-type: none"> • Industry participation in needs analysis • Growers' needs have not previously been well articulated

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<p>OBJECTIVE 1 ACTIVITIES</p> <p>1.1.1 Develop and facilitate regional industry workshops to gather data for needs analysis from the Northern Australia Vegetable Industry participants and prepare reports.</p>	<ul style="list-style-type: none"> • Workshops attended by industry participants, representative of the Northern Australian Vegetable Industry. • Positive response from industry towards the workshops • Round 1 Workshops completed by January 2000. • Round 2 Workshops completed by June 2001. • Reports prepared and disseminated to industry representatives. 	<ul style="list-style-type: none"> • Record of participants at workshops • Participant feedback sheets from workshops • Workshop reports • Workshop reports • VIDs reports and outward correspondence. 	<ul style="list-style-type: none"> • Large geographical areas • Seasonal production activities may limit workshop attendance. • Industry representatives willing to participate in workshops.
<p>1.1.3 IDOs conduct one on one farm interviews with Northern Australian vegetable producers.</p>	<ul style="list-style-type: none"> • Number and quality of on-farm interviews 	<ul style="list-style-type: none"> • Reports from interviews • Survey methodology elaborated. 	<ul style="list-style-type: none"> • Targets willing to be interviewed. • Growers may not contribute well in a group situation.
<p>1.2.1 Conduct an economic survey of the Northern Australia Vegetable Industry and prepare report .</p>	<ul style="list-style-type: none"> • Survey conducted by November 1999. 	<ul style="list-style-type: none"> • VIDS reports. 	

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	<ul style="list-style-type: none">• Report prepared by June 2000.		
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Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>OBJECTIVE 2 OUTPUTS</p> <p>2.5 Projects developed in collaboration with industry participants to specifically address the Northern Australian Vegetable Industry needs.</p> <p>2.6 Case Studies of Best Practice for the Northern Australian Vegetable Industry developed from Best Practice studies.</p> <p>2.7 Provision of additional services to enhance the business capability of producer groups within the Northern Australian Vegetable</p>	<ul style="list-style-type: none"> • Project plans developed in all areas of the Northern Australian Vegetable Industry • Funding obtained for eligible projects. • Evaluation of proposals against needs assessment. • Case studies maintained and progress reports disseminated to industry. • Case studies have industry-wide relevance and benefit. • Services designed to benefit the whole Northern Australian Vegetable Industry. 	<ul style="list-style-type: none"> • Project plans • VIDS Reports • Project proposals • Feedback from funding organisations. • Project plans and needs assessment. • Project reports. • Project reports and needs assessment. • VIDS Project reports • Record of enquiries 	<ul style="list-style-type: none"> • Growers reluctant to get involved in projects • Funding available for projects. • Some growers are not willing to access the service. • Project may only target individual needs rather than industry needs. • High maintenance activity and groups will be widely dispersed. • May be seen as benefit to minority of ‘big-business’ growers. • Some growers see themselves as too geographically isolated to take advantage of services.

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<p>Industry.</p> <p>2.8 Increased awareness of industry participants of the issues relating to marketing and business opportunities in the Northern Australian Vegetable Industry.</p>	<ul style="list-style-type: none"> • Increase in the number of enquiries • Increased attendance at follow-up activities. 	<ul style="list-style-type: none"> • Attendance records of follow-up activities. 	
<p>OBJECTIVE 2 ACTIVITIES</p> <p>2.1.6 IDOs to participate in national vegetable research and development meetings, collate state and regional needs and provide input into the Australian Vegetable Industry Development Plan</p>	<ul style="list-style-type: none"> • IDOs participating in the national activities. • Number of national meetings attended by IDOs • National needs list developed. 	<ul style="list-style-type: none"> • IDO activity records • IDO activity records • Reports 	<ul style="list-style-type: none"> • Networking limited by geographical dispersion. • National meetings only held twice a year.
<p>2.1.7 Disseminate the Northern Australian Vegetable Industry needs report to the industry.</p>	<ul style="list-style-type: none"> • Report completed by March 2000. • Reports sent to workshop participants and relevant stakeholders in each production area. 	<ul style="list-style-type: none"> • Report • Records • Report 	<ul style="list-style-type: none"> • Participants in assessment are representative of the industry as a whole. • Cost of report production and mail-out may be prohibitive.

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	<ul style="list-style-type: none"> • Report presented in a useable form by industry. • Report adequately captures data obtained from workshops and interviews. 	<ul style="list-style-type: none"> • Evaluation of report against workshop reports and interview data. 	
2.1.8 Conduct a Research and Development workshop with industry researchers.	<ul style="list-style-type: none"> • Workshop conducted within six months from completing the first round of information workshops. • Workshop attended by key researchers from the vegetable industry. • Positive response to workshop from attendees. 	<ul style="list-style-type: none"> • Workshop report • Workshop attendance record • Response sheets from workshop. 	<ul style="list-style-type: none"> • Timing of workshop may not be suitable. • Researchers are responsive to workshop objectives. • There is adequate funding available for projects. • Most research is primarily focussed on on-farm production rather than post-harvest or business management.
2.1.9 Provide assistance to industry participants to develop projects in response to the needs of the Northern Australian Vegetable Industry.	<ul style="list-style-type: none"> • IDO assisting in the development of project plans in all major production areas of the Northern Australian Vegetable Industry • Evaluation of projects against 	<ul style="list-style-type: none"> • Project plans • VIDS reports • Project description and needs list. 	<ul style="list-style-type: none"> • Growers reluctant to get involved in collaborative projects. • Projects may be seen to benefit individual needs rather than industry needs.

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	needs list.		
2.1.10 Provide an application writing service to assist industry participants to develop project application and obtain funding for projects.	<ul style="list-style-type: none"> • IDO to develop project proposals for submission to appropriate funding organisations. • Awareness of the service within the industry. 	<ul style="list-style-type: none"> • Project proposals • Response from funding organisations. • Industry response to the service • Methods used for raising awareness of service. 	<ul style="list-style-type: none"> • Funding is available for projects. • Growers not aware of available funding sources.
2.2.4 Establish Best Practice studies in each major production area of Northern Australia.	<ul style="list-style-type: none"> • At least one Best Practice study established in each major production region. • Communication of outcomes of group activities to industry. 	<ul style="list-style-type: none"> • VIDS Project reports. • Industry publication and case study reports. 	<ul style="list-style-type: none"> • Growers are responsive to best practice groups which have a commercial focus. • Lack of trust between industry participants. • Time to be involved in projects may limit interest.
2.2.5 Assist Best Practice study participants to obtain project funding.	<ul style="list-style-type: none"> • Project proposals written and submitted to funding bodies for approval. 	<ul style="list-style-type: none"> • Project proposals and feedback received from funding bodies. 	<ul style="list-style-type: none"> • Funding is available for projects. • Time and skill needed to develop projects. • Growers not aware of available funding resources.
2.2.6 Work with participants of Best Practice studies to achieve project outcomes and develop	<ul style="list-style-type: none"> • IDO maintaining contact with Best Practice participants and providing guidance for 	<ul style="list-style-type: none"> • Progress reports from best practice group projects. 	<ul style="list-style-type: none"> • Maintenance of groups is a high-input activity.

APPENDIX B
VIDS Project Logical Framework Matrix

best practice case studies.	<p>project completion.</p> <ul style="list-style-type: none"> • Best practice processes identified and articulated into report form. • Case studies of best practice developed and reports disseminated to industry. • Case studies of best practice have industry-wide application. 	<ul style="list-style-type: none"> • IDO contact records. • Progress reports from best practice group projects. • Project reports. • Industry feedback • Case Studies evaluated against needs assessment. 	<ul style="list-style-type: none"> • Report is written in a usable form for grower groups. • Models are applicable industry-wide.
2.3.3 Identify the services or activities required by producers to enhance their business capabilities.	<ul style="list-style-type: none"> • Services and activities developed in response to business needs assessment. • Services and activities are available to all industry participants regardless of location. • Positive response from industry to the services and activities provided. 	<ul style="list-style-type: none"> • Evaluation of services and activities against needs assessment. • Evaluation of availability of services and activities. • Feedback from industry. 	<ul style="list-style-type: none"> • Cost of providing activities and services throughout the Northern Australian region may limit scope of these services.

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VIDS Project Logical Framework Matrix

2.3.4	IDO to provide assistance to industry participants to form of Chain Alliances.	<ul style="list-style-type: none">• IDOs actively promoting the benefits of Chain Alliances.• Chain Alliances formed	<ul style="list-style-type: none">• Media reports• Workshop materials• Record of enquiries• VIDS reports	<ul style="list-style-type: none">•
2.4.3	Design and facilitate regional workshops ‘The Changing Face of Horticulture’ that will specifically address marketing and business issues beyond the farm gate and encourage industry collaboration in project development.	<ul style="list-style-type: none">• Workshops attended by Northern Australian Vegetable Industry participants in all major production areas of Northern Australia.• Workshop content designed to suit each region.• Positive response from attendees.• Workshops completed by October 2000.• Attendance at follow-up activities and requests for assistance.• Collaborative industry	<ul style="list-style-type: none">• Workshop attendance records.• Workshop notes and feedback sheets.• Workshop feedback sheets.• Workshop reports.• Attendance record for activities• Record of enquiries.• Project proposals	<ul style="list-style-type: none">• Timing of workshops may not suit all industry participants.• Reluctance by growers to attend such activities.• Central location of workshop to facilitate attendance.• Attendees willing to respond to feedback sheets.• The number of requests for assistance has caused difficulty in fulfilling all requests.• Growers unwilling to contribute in some group

APPENDIX B
VIDS Project Logical Framework Matrix

	project proposals written.		situations.
2.4.4 IDOs facilitating networking among industry participants.	<ul style="list-style-type: none"> • IDOs act on enquiries and provide contacts for specific information, services and project collaboration. 	<ul style="list-style-type: none"> • Record of enquiries and actions taken 	<ul style="list-style-type: none"> • Not all enquiries are recorded due to time and location when enquires are received.

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VIDS Project Logical Framework Matrix

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VIDS Project Logical Framework Matrix

Narrative Summary	Verifiable Indicators	Means of Verification	Comments/Assumptions
<p>OBJECTIVE 3 OUTPUTS</p> <p>3.2 A continuous information updating process to service the needs of the Northern Australian Vegetable Industry participants.</p>	<ul style="list-style-type: none"> Information is disseminated to industry on a continual basis. 	<ul style="list-style-type: none"> Record of information sent. Record of information provided in the field. 	<ul style="list-style-type: none"> Not all information disseminated will have industry-wide relevance.
<p>OBJECTIVE 3 ACTIVITIES</p> <p>3.2.1 Design information packages targeted to the needs of each production area</p>	<ul style="list-style-type: none"> Information provided in packages directly relates to the needs of industry participants in each production area. Information presented in a useable form for industry participants. Quality of information presented in packages. Positive response from 	<ul style="list-style-type: none"> Content evaluated against needs assessment. Feedback from industry Evaluation of the currency of information and sources used. Feedback from industry 	<ul style="list-style-type: none"> High cost of production of hard copies and dissemination to industry participants Industry participants receive so much information already. Growers have little time to read and evaluate information. Growers prefer to receive one-on-one advice rather than reading reports.

APPENDIX B
VIDS Project Logical Framework Matrix

	industry		
3.2.2 Develop and facilitate regional information workshops	<ul style="list-style-type: none"> • Workshops attended by Northern Australian Vegetable Industry participants. • Workshop content designed to suit each region. • Positive response from attendees. • Workshops completed by July 2001. 	<ul style="list-style-type: none"> • Workshop attendance records. • Workshop notes and feedback sheets. • Workshop feedback sheets. • Workshop reports. 	<ul style="list-style-type: none"> • Industry participants have time to attend workshops. • Attendees are willing to fill out feedback sheets
3.2.3 Develop and facilitate a series of information evenings 'The Changing Face of Horticulture' specifically addressing marketing and business beyond the farm gate which effects long term business viability	<ul style="list-style-type: none"> • Workshops attended by Northern Australian Vegetable Industry participants. • Workshop content designed to suit each region. • Positive response from attendees. • Workshops completed by 	<ul style="list-style-type: none"> • Workshop attendance records. • Workshop notes and feedback sheets. • Workshop feedback sheets. • Workshop reports. 	<ul style="list-style-type: none"> • Industry participants have time to attend workshops. • Growers recognise themselves as business entities. • Attendees are willing to fill out feedback sheets
3.2.4 Develop a web-based information database targeted to	<ul style="list-style-type: none"> • Database completed by June 30 2001. 	<ul style="list-style-type: none"> • Database active 	<ul style="list-style-type: none"> • Information provided is relevant and useful.

APPENDIX B
VIDS Project Logical Framework Matrix

the needs of Northern Australian vegetable industry.	<ul style="list-style-type: none"> • Vegetable industry access the database. • Positive response to database from industry regarding content, use and accessibility. 	<ul style="list-style-type: none"> • Record of enquiry and website records. • Industry feedback from web form • Feedback from contact with industry. 	<ul style="list-style-type: none"> • Not all industry participants have access to web. • Computer literacy is low among industry participants.
3.1.5 VIDS Project team providing current information of projects and activities to the various reporting services available.	<ul style="list-style-type: none"> • Updates provided by IDOs for the various VIDS Project activities. • VIDS Project activities published in available media (Vegetable News, Fruit and Vegetable News Queensland, Good Fruit and Vegetables Magazine, QFVG Website). 	<ul style="list-style-type: none"> • Reports • Published material 	<ul style="list-style-type: none"> • Time constraints limit the ability of IDOs to write articles.

Survey of vegetable growers in Northern Australia for VIDS project (April/May 2002)

A. Demographics

A1) Region

- | | | | |
|--|---|---|--------------------------|
| <input type="checkbox"/> Northern NSW
Lockyer | <input type="checkbox"/> Darling Downs | <input type="checkbox"/> Granite Belt | <input type="checkbox"/> |
| <input type="checkbox"/> Fassifern
Bundaberg area | <input type="checkbox"/> Brisbane Metro | <input type="checkbox"/> Sunshine Coast | <input type="checkbox"/> |
| <input type="checkbox"/> Burdekin
(Atherton) | <input type="checkbox"/> Bowen / Gumlu | <input type="checkbox"/> Far North Queensland | |
| <input type="checkbox"/> Northern Territory | <input type="checkbox"/> Gympie | | |

A2) Major crop/s: _____

A3) What is the area of property that is cropped by you for the purposes of vegetable production. (tick one box only)

- | | | | |
|------------------------------------|-------------------------------------|---------------------------------------|--|
| <input type="checkbox"/> 0 – 5 ha | <input type="checkbox"/> 20 – 49 ha | <input type="checkbox"/> 100 – 149 ha | <input type="checkbox"/> 200 – 499 ha |
| <input type="checkbox"/> 6 – 19 ha | <input type="checkbox"/> 50 – 99 ha | <input type="checkbox"/> 150 – 199 ha | <input type="checkbox"/> 500 – 599 ha |
| | | | <input type="checkbox"/> 1000 or more ha |

A4) What is your gross income for an average financial year?

- | | | |
|--|---|---|
| <input type="checkbox"/> Under \$25,000 | <input type="checkbox"/> \$100,000 to \$249,999 | <input type="checkbox"/> \$2 million to \$499,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$250,000 to \$499,999 | <input type="checkbox"/> \$5 million to \$9,999,999 |
| <input type="checkbox"/> \$50,000 to \$74,999 and over | <input type="checkbox"/> \$500,000 to \$999,999 | <input type="checkbox"/> \$10 million |
| <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$1 million to \$1,999,999 | |

B. Information needs

B1) As a grower what type of information and issues do you need to address on a regular basis and where do you source information for them? *{Ask the question and then categorise the response if possible, giving a description.}*

☐ Production _____

Where do you source it?

- | | | |
|--|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Vegetable News database | <input type="checkbox"/> QFVG News | <input type="checkbox"/> Vege. info |
| <input type="checkbox"/> GrowSearch extension officers | <input type="checkbox"/> QFVG IDO's | <input type="checkbox"/> DPI |

Survey of vegetable growers in Northern Australia for VIDS Project

☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

☐ Business & financial management

Where do you source it?
☐ Vegetable News ☐ QFVG News ☐ Vege. info
☐ GrowSearch ☐ QFVG IDO's ☐ DPI
☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

☐ Quality & Marketing

Where do you source it?
☐ Vegetable News ☐ QFVG News ☐ Vege. info
☐ GrowSearch ☐ QFVG IDO's ☐ DPI
☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

☐ Consumer demands

Where do you source it?
☐ Vegetable News ☐ QFVG News ☐ Vege. info
☐ GrowSearch ☐ QFVG IDO's ☐ DPI
☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

☐ Transport _____

Where do you source it?

APPENDIX C

Survey of vegetable growers in Northern Australia for VIDS Project

☐ Vegetable News ☐ QFVG News ☐ Vege. info
database
☐ GrowSearch ☐ QFVG IDO's ☐ DPI
extension officers
☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

☐ Other _____

Where do you source it?

☐ Vegetable News ☐ QFVG News ☐ Vege. info
database
☐ GrowSearch ☐ QFVG IDO's ☐ DPI
extension officers
☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

☐ Other _____

Where do you source it?

☐ Vegetable News ☐ QFVG News ☐ Vege. info
database
☐ GrowSearch ☐ QFVG IDO's ☐ DPI
extension officers
☐ Private consultants ☐ Field days

☐ Other publications _____
☐ Other _____
☐ Other _____

B2) What way/s do you like receiving information?

☐ Shed meetings ☐ Newsletter ☐ One-on-one
☐ Other

C. Awareness of VIDS

C1) Are you aware of the following services? {Tick those that are appropriate.}

☐ Vegetable database
☐ Information workshops
☐ Changing face of horticulture workshops
☐ Industry development officer (information)
☐ Industry development officer (market development)
☐
☐

APPENDIX C

Survey of vegetable growers in Northern Australia for VIDS Project

C2) How did you find out about the services?

- | | | |
|--|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Vegetable News database | <input type="checkbox"/> QFVG News | <input type="checkbox"/> Vege. info |
| <input type="checkbox"/> GrowSearch extension officers | <input type="checkbox"/> QFVG IDO's | <input type="checkbox"/> DPI |
| <input type="checkbox"/> Private consultants | <input type="checkbox"/> Field days | |
- ☐ Other _____

Comments:

D. Usefulness of VIDS services

D1) If you have used any of the services, how would you rate the benefit you got from them and why? (1=no benefit, 7=significant benefit)

	1	2	3	4	5
	6	7			
<input type="checkbox"/> Vegetable database	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> Information workshops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> Changing face of hort. workshops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			

APPENDIX C

Survey of vegetable growers in Northern Australia for VIDS Project

<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> IDO (information)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> IDO (market development)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<input type="checkbox"/> Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>			

APPENDIX C

Survey of vegetable growers in Northern Australia for VIDS Project

☐ Other:

☐
☐

☐
☐

☐

☐

☐

E. Change in management practices, sustainability and/or profitability

E1) If you have used any of the VIDS services, have they influenced you to change any of your management practices, level of sustainability or profitability?

Service	Changes in management practice due to service	Changes in sustainability or profitability

APPENDIX C
Survey of vegetable growers in Northern Australia for VIDS Project

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Survey of participants in Market Business

Development activities provided by VIDS project

You have been targeted for this survey because you have participated in the Market Business Development activities provided by the VIDS project, implemented by QFVG.

A. Demographics

A1) Region

- | | | | |
|---------------------------------------|--|---|--------------------------|
| <input type="checkbox"/> Northern NSW | <input type="checkbox"/> Darling Downs | <input type="checkbox"/> Granite Belt | <input type="checkbox"/> |
| Lockyer | | | |
| <input type="checkbox"/> Fassifern | <input type="checkbox"/> Brisbane Metro | <input type="checkbox"/> Sunshine Coast | <input type="checkbox"/> |
| Bundaberg area | | | |
| <input type="checkbox"/> Burdekin | <input type="checkbox"/> Bowen / Gumlu | <input type="checkbox"/> Gympie | <input type="checkbox"/> |
| Northern Territory | <input type="checkbox"/> Far North Queensland (Atherton) | | |

A2) Major crop/s: _____

A3) What is the area of property that is cropped by you for the purposes of vegetable production. (tick one box only)

- | | | | |
|------------------------------------|-------------------------------------|---------------------------------------|--|
| <input type="checkbox"/> 0 – 5 ha | <input type="checkbox"/> 20 – 49 ha | <input type="checkbox"/> 100 – 149 ha | <input type="checkbox"/> 200 – 499 ha |
| <input type="checkbox"/> 6 – 19 ha | <input type="checkbox"/> 50 – 99 ha | <input type="checkbox"/> 150 – 199 ha | <input type="checkbox"/> 500 – 599 ha |
| | | | <input type="checkbox"/> 1000 or more ha |

A4) Gross income

- | | | |
|---|---|---|
| <input type="checkbox"/> Under \$25,000 | <input type="checkbox"/> \$100,000 to \$249,999 | <input type="checkbox"/> \$2 million to \$499,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$250,000 to \$499,999 | <input type="checkbox"/> \$5 million to \$9,999,999 |

APPENDIX D

Survey of participants in MBDS activities provided by VIDS Project

- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> \$50,000 to \$74,999
and over | <input type="checkbox"/> \$500,000 to \$999,999 | <input type="checkbox"/> \$10 million |
| <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$1 million to \$1,999,999 | |

A5) What best describes your business structure?

- | | | |
|--|--|------------------------------------|
| <input type="checkbox"/> Grower
Consolidator | <input type="checkbox"/> Grower Packer | <input type="checkbox"/> |
| <input type="checkbox"/> Grower Group
structure | <input type="checkbox"/> Packhouse | <input type="checkbox"/> No formal |

APPENDIX D

Survey of participants in MBDS activities provided by VIDS Project

B. Awareness of Service

B1) How did you hear about the services provided by the VIDS project for market development?

- | | |
|---|---|
| <input type="checkbox"/> CFH Presentations | <input type="checkbox"/> QFVG News |
| <input type="checkbox"/> Vegetable News | <input type="checkbox"/> QFVG IDO's (S Comiskey and S Heritage) |
| <input type="checkbox"/> DPI Extension officers | <input type="checkbox"/> Other growers |
| <input type="checkbox"/> Private consultants | <input type="checkbox"/> Field days |
| <hr/> | |
| <input type="checkbox"/> Other publications _____ | <input type="checkbox"/> Other _____ |
| <hr/> | |

B2) For what reason/s did you attend the CFH presentations?

B2) How would you rate the content of the CFH presentations?

(1=no benefit, 7=significant benefit)

- | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | | | |

B3) What specific benefit were the presentations to you?

- ☐ Increased knowledge and awareness of marketing processes
- ☐ awareness of assistance available to growers to enhance business operations
- ☐ an opportunity to discuss the direction of the vegetable industry
- ☐ presentations provided a stimulus to change current business practices
- ☐ other
- ☐ no benefit

B4) Do you have any suggestions as to how the presentations could be improved?

APPENDIX D

Survey of participants in MBDS activities provided by VIDS Project

C. Advice/Assistance provided by VIDS.

C1) As you have participated in activities provided by the Market Business Development service offered under VIDS, what category best describes the type of Advice/Assistance provided?

- ☐ Development of Business Plans ☐ Organisational structure
- ☐ Development/identification of supply chain linkages
- ☐ Development/identification of new business opportunities
- ☐ Obtaining business project funding
- ☐ Educational programs
- ☐ Support in developing and maintaining grower groups
- ☐ Other _____

C2) On a scale of 1 to 7 (1 being the lowest), how would you rate the impact/benefit of the assistance from MBDS on your operations? (1 no benefit, 7 significant benefit)

1	2	3	4	5
6	7			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			

C3) What changes have you made to your business operations that are a result of your involvement with the Market Business Development service provided by VIDS

D. Future activities of Market Business Development service

D1) As a grower/group business/service provider, what services do you require in terms of market and business activities for your operations?

APPENDIX D

Survey of participants in MBDS activities provided by VIDS Project

D2) In general, what services do you think should be provided by a Market Business Development Service?

D3

The main crops noted by the respondents (A2 in survey). Note that many of the respondents noted more than one crop.

Major Crops	Number of respondents nominating crops	eggplant	
		okra	1
pumpkins	16	radish	1
zucchini	16	melons	2
Capsicums	15	passionfruit	1
potatoes	12	rockmelons	1
beans	11	mangoes	1
chillies	10	custard	1
onions	10	apples	
tomatoes	10	stone fruit	1
cabbage	9	strawberries	1
cauliflower	8	apples	1
eggfruit	7	watermelons	1
beetroot	6	Total	210
lettuce	6		
sweet potatoes	6		
broccoli	5		
cucumber	5		
sweet corn	5		
turnips	4		
button squash	3		
carrots	3		
silverbeet	3		
spring onions	3		
squash	3		
avocadoes	2		
continental cucumbers	2		
herbs	2		

Major Crops	Number of respondents nominating crops
hydroponic tomatoes	2
peas	2
water cress	1
snow peas	1
artichokes	1
baby spinach	1
bunching lines	1
celery	1
chokos	1
corn	1
cucurbits	1
small crops	1
fancy lettuce	1
lebanese	1

Number of main crops listed	Number of respondents
1	31
2	35
3	22
4	8
5	2
Total number of respondents	98

Summaries of the types of information and issues needed to be addressed on a regular basis, and where they are sourced in section B1 of the grower survey. Note that a grower can be represented in several categories of information/issues and sources.

Summary across information types

Source	Production information	Quality/marketing	Business/financial	Consumer demands	Other: seed varieties	Other: crop management	Other: chemicals	Other	Total
Vegetable info database	1								1 (0.6%)
QFVG News	10	2						4	16 (8.9%)
QFVG IDOs	4					1	3	1	9 (5.0%)
Field days	1				1				2 (1.1%)
QFVG/VIDS Sub-total	16	2			1	1	3	5	28 (15.6%)
DPI	23	1			1	3		3	31 (17.2%)
Private consultants	19	2	1		8	3	2	2	37 (20.6%)
Other	36	16		3	5	3	3	18	84 (46.7%)
Non-QFVG/VIDS Sub-total	78	19	1	3	14	9	5	23	152 (84.4%)

Total	94(52.2 %)	21(11.7 %)	1(0.6%)	3(1.7%)	15(8.3 %)	10(5.6%)	8(4.4%)	28(15.6 %)	180 (100%)
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Production information

	DP I	QFVG News	Private consultants	Vegetable information database	QFVG IDOs	Field days	Other	Totals
General information	4	0	2	0	0	0	6	12
Growing crops	2	2	2	0	0	0	3	9
Prices & quality control	1	1	0	0	0	1	1	4
Chemicals	2	0	1	0	0	0	1	4
Pests & disease	14	7	14	1	4	0	25	65
Totals	23	10	19	1	4	1	36	94

Business and financial management information

Only one response, sources from private consultants.

Quality and marketing information

	DP I	QFVG News	Private consultants	Oth er	Tot al
General	1	1	2	4	8
Quality control				3	3
Consumer awareness, education				1	1
Market reports				4	4
Marketing product				4	4
Totals	1	1	2	16	20

Consumer demands

Only 3 responses, sourced from 'other'.

Transport

There were no responses in this category.

Other

	DPI	QFVG IDO's	QFVG News	Private consultants	Field days	Other	Total
Demand of produce						1	1 (1.6%)
How the rocklea markets work			1			1	2 (3.3%)
New products	1	1	1	1			4 (6.6%)
New technologies						1	1 (1.6%)
Off label permits			1			2	3 (4.9%)
Processing	1						1 (1.6%)
Wage rises						1	1 (1.6%)
General information	1					4	5 (8.2%)
Chemicals		3		2		3	8 (13.1%)
Crop management	3	1		3		3	10 (16.4%)
Prices						2	2 (3.3%)
Varieties & seeds	1			8	1	5	15 (24.6%)
Water			1	1		1	3 (4.9%)
Weather						1	1 (1.6%)
Agent information what they are agents for etc						1	1 (1.6%)
Education services						1	1 (1.6%)
What can I grow for a						1	1 (1.6%)

niche market Where the industry is heading					1	1 (1.6%)
Totals	7 (11.5%))	5 (8.2%)	4 (6.6%)	15 (24.6%)	1 (1.6%))	29 (47.5%) 61 (100%)

Comments made about the benefit of services provided by VIDS in section D1 of the survey.

Vegetable database

Rating	Region	Comments on Vegetable database
(blank)	Bowen/ Gumlu	may be beneficial one day
	Bundaberg	no time
	Burdekin	"bullshit"
	Darling Downs	probably would be useful
	Lockyer Valley	no internet not interested - age thing
	NNSW	don't use the internet
0	Burdekin	no internet
1	Bowen/ Gumlu	no internet
	Bundaberg	no internet no time not internet savvy
	Burdekin	no time
	FNQ	no internet
	Granite Belt	don't use the internet
	Lockyer Valley	doesn't have internet no internet
	Lockyer Valley - Fassifern	no internet, wouldn't use it
	Sunshine Coast/ Gympie	no internet
1.5	Bundaberg	no internet
2	Granite Belt	not relevant for his search, but would be good for other people
3	Lockyer Valley	don't use it, don't go looking for information
3.5	Bundaberg	need to have a hands on workshop to learn how to use it
	Lockyer Valley	good idea if there's time
4	Bowen/ Gumlu	computer illiterate, but probably pretty important may be useful use it if need be
	Brisbane metro	prefer a pamphlet - may be an age thing
	Bundaberg	would be good if more interested
	Burdekin	would use it if I needed to
4.5	Bundaberg	different people have different benefits
5	Bowen/ Gumlu	yes it seems good
	Brisbane metro	more so for hydroponic/ greenhouse information
	Burdekin	don't use internet all the time
	Lockyer Valley	haven't used it but good idea
	Lockyer Valley - Fassifern	in the future that will be important
6	Burdekin	useful
	Darling Downs	have not used it, but providing data is useful
	Granite Belt	needs more of an overall emphasis

	Lockyer Valley - Fassifern	good idea - accessible, quick and easy
	NNSW	have not used it, but would be useful, particularly for insect problems and chemicals, quantities etc
	Sunshine Coast/Gympie	great, should be across all commodities
7	Bundaberg	great idea, should include data sheets of chemicals sounds great will definitely use it sounds marvelous
	Darling Downs	have not used it but will. Consider individual laziness
	Granite Belt	don't have the internet, but it's a great idea have not used it, but will in the future. Don't have to pick up much for it to be useful
	Lockyer Valley	could be very useful good idea

Information workshops

Rating	Region	Comments on information workshops
(no rating)	Bundaberg	who's got time to go to meetings?
	Burdekin	never any in our area
	FNQ	no time for going to these sort of things
	Lockyer Valley	no, time, or we already know it
1	Granite Belt	don't like workshops
2	Bundaberg	not interested, may be an age thing
	Lockyer Valley	no time
2.5	Lockyer Valley	sometimes only get listeners along - need really small groups, so that there is more interaction
4	Bundaberg	would be good if more interested
	Lockyer Valley	make sure they are at people's places, get out and look at things.
	NNSW	time factor, don't always have it
5	Bundaberg	have to get growers to attend though
	Burdekin	don't always ask us what to do - sometimes we want you to come up with ideas for us
	NNSW	gives growers avenues to go down. Especially useful for younger growers
6	Bundaberg	market IDO attended a methame workshop and spoke well. Not many people come to these need to make sure that there are going to be enough people attending to make it worthwhile
	Darling Downs	good to get people's ideas - can do this over the phone too whinge about situation, good insight into farmers problems

	Lockyer Valley	excellent
7	Lockyer Valley	needs to be talk between researchers and growers for more/ future research

Changing face of horticulture workshops

Rating	Region	Comments on changing face of horticulture workshops
(no rating)	Bundaberg	no time
	Burdekin	never any in our area
1	Granite Belt	don't like workshops
2	Lockyer Valley	no time
4	Bundaberg Burdekin	would be good if more interest good to see people's faces
5	Bundaberg Lockyer Valley	have to get growers to attend though make sure there's enough people attending quite good, new ideas

Industry Development Officer (information)

Rating	Region	Comments on Industry Development Officer (information)
(no rating)	Bowen/ Gumlu	looks after himself, doesn't need it
	Bundaberg	never used them only useful for bigger growers good and I might learn something, but no time not really interested, don't see them enough
	Burdekin	waste of time
	Darling Downs	don't know how beneficial they are
2	Bowen/ Gumlu Bundaberg Burdekin Granite Belt Lockyer Valley	not helpful to me wonder where it is all getting us we have no use better to talk to other growers, and go on experience lost touch with these people now have this side of things covered
3	Darling Downs Lockyer Valley	people do a lot of this work already, not something that is needed all the time, not a "have to have" never used it, don't really understand what it consists of
3.5	Bowen/ Gumlu Lockyer Valley	good idea. There for the people who want to use them yes would be beneficial
4	Bundaberg FNQ	yes could be helpful good to find out what's going on

	Granite Belt Lockyer Valley	what can they offer that I can't find myself? good, but no time for them good, but not too important to them not too relevant to us you come to me in my territory
	NNSW	they have their roles, but what can they really do for us
5	Bowen/ Gumlu Burdekin Darling Downs Granite Belt Lockyer Valley	good to have someone there to help wouldn't use it but a good idea beneficial to the industry in general - individually hard to see direct benefit never used them but good idea make sure that research is relevant any help is excellent don't go looking for info though have someone in this role, but not heaps of people under them - no assistants needed. information is what we need we don't but other people do need him yes great, if they can support us getting over the big hurdles
5.5	Lockyer Valley	it's important, but I don't receive much information from them.
6	Bowen/ Gumlu Brisbane metro Bundaberg Burdekin Granite Belt Lockyer Valley Lockyer Valley - Fassifern NNSW	get first hand information, otherwise we don't hear what is going on. have not dealt with them though for larger scale farmers this would be useful keep up the good work - someone has to do it read articles from them in the newsletter, get the info that way they cover the areas where we need information gives you the help you deserve good idea good for those who would use it haven't heard about it though this role has its place in the overall scheme important to have someone there when you have questions interesting if you are always looking at different things - never used them thought useful so long as they can communicate and provide access to information
7	Bowen/ Gumlu Bundaberg	one part of the service when required, they provide great services anything to help do exactly what they say they are going to do, people know them and trust them to work with excellent good to coordinate with the local officers too has to make sure that people learn from one year to the next - so that the same mistake isn't always made not everyone is interested, but those who look for help generally

	Burdekin	do better Sam in particular very important and does her job well definitely - able to access information easier and keep up to date especially for workshops for small crops have not used them, but will in the future, need a hand with that sort of thing
	Darling Downs	good to have someone who listens and tries to get growers thoughts up. Otherwise this doesn't always come out haven't taken full advantage of the position, good role, if people see a future in farming
	Granite Belt	need them for all commodities yes very important
	Lockyer Valley	for exporting it's paramount - getting people together great public relations
	Lockyer Valley - Fassifern	if we were on a bigger scale of production it would be good

Industry Development Officer (market development)

Rating	Region	Comments on Industry Development Officer (market development)
(no rating)	Bowen/ Gumlu	looks after himself, doesn't need it never used them. only useful for bigger growers
	Bundaberg	good and might learn something, but no time not interested, don't see them enough
	Burdekin	waste of time
	Darling Downs	don't know how beneficial they are
1	Darling Downs	no advantage of position
2	Bowen/ Gumlu	not helpful to me
	Burdekin	we have no use
	Granite Belt	getting out of growing, therefore losing touch
	Lockyer Valley	not for me, doesn't really apply
3	Bundaberg	not very interested - market through SunFresh
	Darling Downs	not as important if you have a good agent, but good to have the option to talk to someone else people do a lot of this work already. Not something that we need all the time.
3.5	Burdekin	good & bad reports - co-op sheds
	Lockyer Valley	don't see it as too important yes would be beneficial
	Lockyer Valley - Fassifern	gave some good ideas
4	Bundaberg	yes could be helpful
	FNQ	good to find out what's going on
	Granite Belt	what can they offer that I can't find myself?
	Lockyer Valley	good but no time for them

		<p>good, but not too important to them</p> <p>not too relevant to us</p> <p>you come to me in my territory</p>
5	<p>Burdekin</p> <p>Granite Belt</p> <p>Lockyer Valley</p>	<p>beneficial generally - individually hard to see direct benefits</p> <p>never used them, but good idea</p> <p>any help is excellent</p> <p>could help with supplying fresh markets</p> <p>don't go looking for info though</p> <p>I'm too small to worry about this</p> <p>need to help us deal directly with the consumer more</p> <p>pay one person more money, and not have so many people</p> <p>That'd be good, but where are they?</p>
6	<p>Bowen/ Gumlu</p> <p>Brisbane metro</p> <p>Bundaberg</p> <p>Burdekin</p> <p>Granite Belt</p> <p>Lockyer Valley</p> <p>Lockyer Valley - Fassifern</p>	<p>people who would find it good are those new growers and innovative ones</p> <p>have not dealt with them though</p> <p>for larger scale farmers, but not for him</p> <p>good idea</p> <p>keep up the good work</p> <p>growers good at growing, need someone good at marketing</p> <p>they cover the areas where we need information</p> <p>gives you the help you deserve</p> <p>good idea</p> <p>good for those who would use it</p> <p>if the need arises, it's handy to have someone there</p> <p>important role</p> <p>major role</p> <p>don't lose roles like this</p> <p>important to have someone there when you have questions</p>
7	<p>Bowen/ Gumlu</p> <p>Bundaberg</p> <p>Burdekin</p> <p>Granite Belt</p> <p>Lockyer Valley</p>	<p>good to have someone there to help</p> <p>one part of the service</p> <p>when required they provide great service</p> <p>anything to help</p> <p>excellent</p> <p>good to coordinate with people at local level too</p> <p>good to work with, say and do exactly what they said they would</p> <p>has to make sure that people are learning all the time</p> <p>more important than information IDO</p> <p>Shane in particular very important, has been terrific in the past</p> <p>very important</p> <p>will use them in the future, need a hand with that sort of thing</p> <p>this is what we need the most</p> <p>very important - farming has changed and farmers need help</p> <p>yes very important</p> <p>always looking for marketing strategies, ways to get the produce sold</p> <p>for export it's paramount - getting people together</p>

	Lockyer Valley - Fassifern	have not dealt with them though if we were in a bigger scale of production it would be good
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VG98121

Vegetable Industry Development Service – Northern Australia

**Report on Industry Perceptions of the Vegetable
Industry Development Service Role**

(June 2003)

Compiled by:

**Julia Telford & Shane Comiskey (Vegetable Industry Development
Officers)**

Queensland Fruit & Vegetable Growers Ltd.

1.0 introduction

With the completion of the Vegetable Industry Development Service project VG98121 in June, 2003, the project team considered it valuable to gain an insight from its customer base on a number of issues. These included:

1. The value that industry placed on the service provided by the Industry Development Officers who delivered the projects services
2. Input from industry in relation to future areas of focus for the two continuing projects for service delivery and methods.

2.0 survey methodology

A total of 950 surveys were mailed to vegetable growers in Queensland, Northern New South Wales and the Northern Territory. Those growers contacted were identified through the Queensland Fruit & Vegetable Growers database, in combination with mailing lists development by the IDO's particularly for the NT and Northern NSW.

A mailed survey was identified as the best method to survey the entire population due in part to time and financial constrictions, but also due to the very large population size. Also a in-depth survey was conducted in 2002 and so this survey sought to verify the findings from that consultation.

A copy of the survey instrument was attached in Appendix One.

Surveys were mailed to industry in April, 2003 with a 5 week time period allowed for responses.

A total of 69 responses were received which represents a response rate of 7.3%. Industry sources state that this response rate is higher than industry standards and so therefore conveys a interest in the subject.

3.0 Survey results and discussion

PART A: PERSONAL DETAILS

A total of 54 commodities (or groups of commodities) were produced by the 69 survey respondents. As would be expected there were numerous responses from certain producers reflecting their mixed production profiles. The cucurbitaceae family was the most heavily represented in conjunction with beans. The wide range of products produced highlights the diverse nature of the vegetable industry in Northern Australia (and Australia). Further details are presented below in Table 1.

All production regions in Queensland were represented in the survey, with the greatest numbers of responses from the Bundaberg region. This wide dispersation of respondents further confirms the coverage achieved by the VIDS project. No responses were received from either the Northern Territory or Northern New South Wales. This result would be expected for the Northern Territory where there was a major focus on Non-English Speaking Background people. The low level of response from Northern New South Wales was however disappointing.

No additional information was sought from respondents in relation to their businesses, apart from contact details, as this information is already held with other agencies (ie QFVG Ltd) and it was felt that asking more in-depth questions may have resulted in a lower response rate.

Table 1: Respondents Indication of Crops grown			
Crop	No. Respondents	Crop	No. Respondents
Asian vegetables	1	Leaf and stalk vegetables	1
Asparagus	3	Leeks	1
Basil	1	Lemon grass	1
Beans	11	Lettuce	7
Beetroot	4	Mint	1
Brassica	1	Mushrooms	1
Broccoli	7	Okra	2
Button squash	1	Onion	2
Cabbages	4	Oregano	1
Capsicums	6	Parsley	5
Carrots	4	Peas	1
Cauliflower	6	Potatoes	4
Celery	2	Pumpkins	10
Cherry tomatoes	1	Radish	1
Chillis	4	Rosemary and thyme	1
Chinese cabbage	1	Silver beets	7
Chinese vegetable	1	Small crops	2
Chokos	4	Snow peas	5
Coriander	1	Squash	2
Cucumbers	16	Sugar loaf	1
Custard apples	2	Sugar snap peas	2
Egg plant	7	Sweet corn	2
Eschalots	3	Sweet potato	2
Galangal	2	Tomatoes	10
Herbs	2	Turmeric	1
Hydroponic lettuce	3	Zucchini	12

PART B: Contact with the Vegetable Industry Development Officers

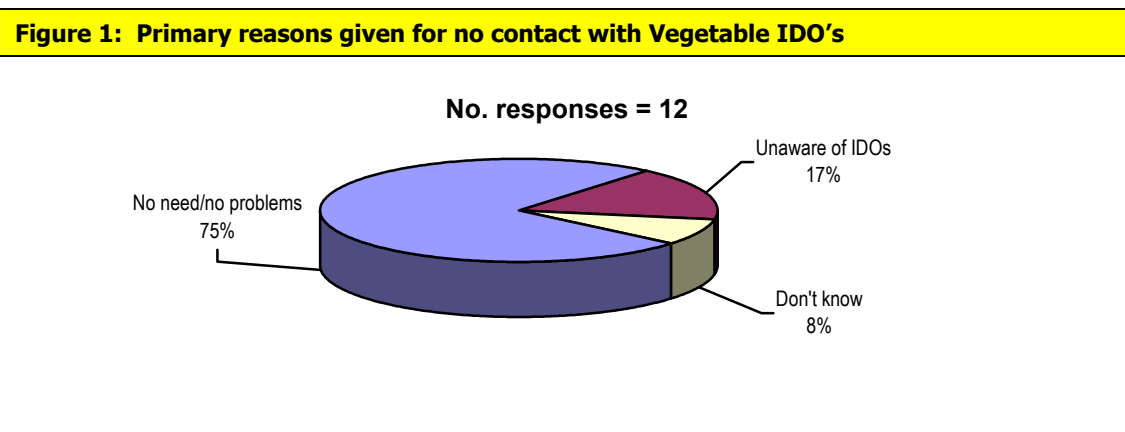
Q.1 Have you had contact with the Vegetable Industry Development Officers (IDO) at QFVG?

Fifty-four percent (54%) (see Table 2) of survey respondents had had contact with one or both of the Vegetable Industry Development Officers. This level of response rate is considered to be extremely high given the population base of over 1,000 vegetable businesses operating within the survey area.

The R&D IDO had a very high recognition rate presumably due to the nature of the information that was known to be available from this source, whereas the MBDS IDO had a lower response rate due to the smaller numbers of projects being operated at any one time and the fact that only producers were surveyed when the IDO's activities involved all across the supply chain.

Table 2: Level of contact with VIDS IDO's		
	No. Respondents	% of Total
Total respondents	69	100
Respondents who contacted Shane Comiskey only	8	12
Respondents who contacted Julia Telford only	21	30
Respondents who contacted both IDO Officer	8	12
Did not have contact with either IDO Officer	32	46

Although there were only 12 respondents to the question about why industry had not made contact with IDO's, the primary reason was that the respondent did not see a need as they did not have any problems for which the IDO could provide assistance. These results are summarised in Figure 1.



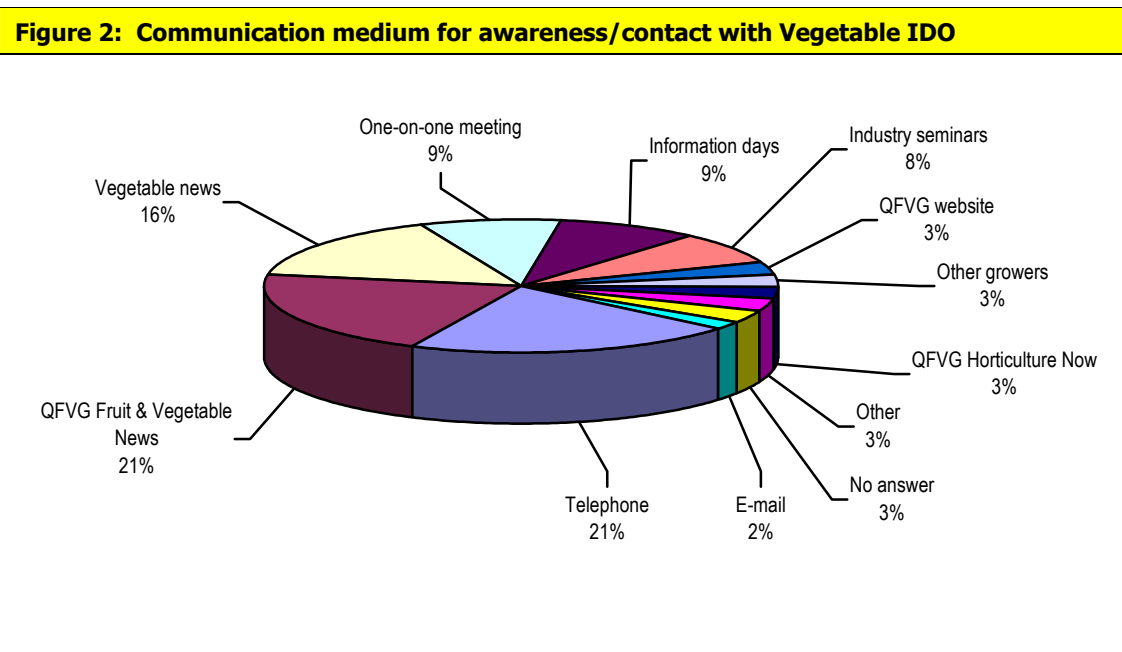
Q.2 How did you come in contact with the Vegetable IDO?

When questioned about how the respondents came in contact with the Vegetable IDO's there was a wide variety of responses (12 in total). The primary mechanisms were via telephone (25 responses), QFVG Fruit & Vegetable News (25 responses) and Vegetable News (19 responses). In regards telephone the initial mechanism about how the industry came to be aware of the IDO's activity were not determined. Full details are provided in Table 3 and Figure 2

The high number of responses in regards accessing information through the print media confirms the importance of this mechanism to present industry information and promote awareness.

The breadth of responses also demonstrates the wide variety of mechanisms that were firstly used by the Vegetable IDO's to promote awareness and communication and secondly, the variety of mechanisms that industry uses to source information.

Table 3: Communication medium for awareness/contact with Vegetable IDO			
Communication Medium	Total Responses	% of Total Responses	% of Total Respondents (n=69)
Telephone	25	21	36
QFVG Fruit & Vegetable News	25	21	36
Vegetable news	19	16	28
One-on-one meeting	10	9	15
Information days	10	9	15
Industry seminars	9	8	13
QFVG website	4	3	6
Other growers	4	3	6
QFVG Horticulture Now	3	3	4
Other	3	3	4
No response	3	3	4
E-mail	2	2	3



Q.3 What sort of information have you requested from the Vegetable IDO?

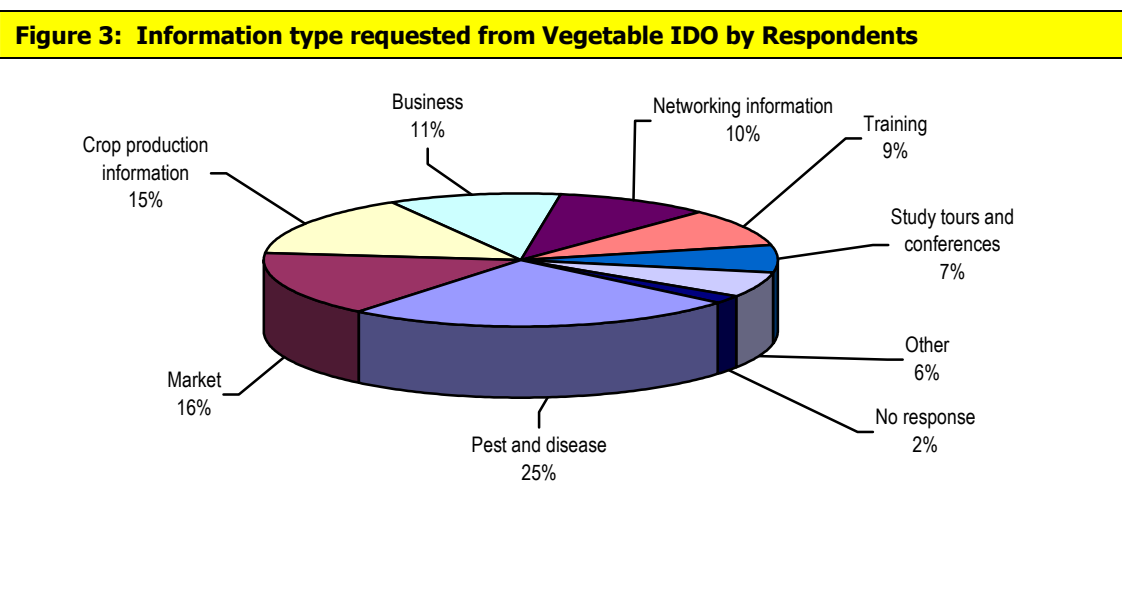
Industry sought a wide variety of information from the VIDS Vegetable IDO's. The principle source of enquires revolved around pest and disease information, with a

range of business/marketing and production information all having relatively equal response rates. Full details are provided in Table 4 and Figure 3

These figures confirm the continued high degree of importance industry places on the supply, acquisition and dissemination of research and development information particularly as it pertains to production. Additionally, industry sees the IDO's as being creditable sources of information and/or advice on marketing and business information. A high degree of importance was the networking ability that the IDO's possessed.

Table 4: Information type requested from Vegetable IDO by Respondents			
Sort of Information	Total Responses	% of Total Responses	% of Total Respondents (n=69)
Pest and disease	22	25	32
Market	14	16	20
Crop production information	13	15	19
Business	10	11	14
Networking information	9	10	13
Training	8	9	12
Study tours and conferences	6	7	9
Other	5	6	7
No response	2	2	3

Source:



Q.3&4: *Do you see the role performed by the IDOs being of benefit to industry? Please rate the quality of service you feel is provided by the IDOs.*

VIDS and the role performed by the IDO's within it are viewed as an important service provider to the Northern Australian vegetable industry. Survey respondents rated it as having 7.6 (out of 10) level of benefit to the industry. Industry sources suggest that this rating is relatively high compared to other service based roles such as IDO's.

Further the overall level of service quality provided by the current IDO's was relatively high at 7.4 (out of 10). These figures compare well with other evaluation reports carried out previously in relation to the VIDS project and suggests that industry considers highly the skills possessed by the current IDO's.

These figures further suggest that when considering retention of other IDO's the skills profile possessed by the current IDO's should be considered.

Survey details are presented below in Table 5.

Table 5: IDO Performance Ratings (1=lowest; 10=highest)		
Question	Total No. of Responses	Avg. Rating
Do you see the role performed by the IDO's being of benefit to industry?	41	7.6
Please rate the quality of service you feel is being provided by the IDO's.	42	7.4

PART C: FUTURE ASSISTANCE

Q.1 *What type of information/assistance would you like to be able to receive from the Vegetable IDO in the future?*

Industry indicated a broad range of areas in which they require assistance for the future. The highest response area was marketing 47 responses (out of a possible 69), with training, industrial relations, study tours, exporting and human resources all scoring high levels of responses.

Each of these areas apart from industrial relations which are the responsibility of state industry organisations, defines the priority areas that industry requires assistance with/for in the future. Presently, all these areas are addressed by the Vegetable IDO's with the exception of industrial relations and human resources.

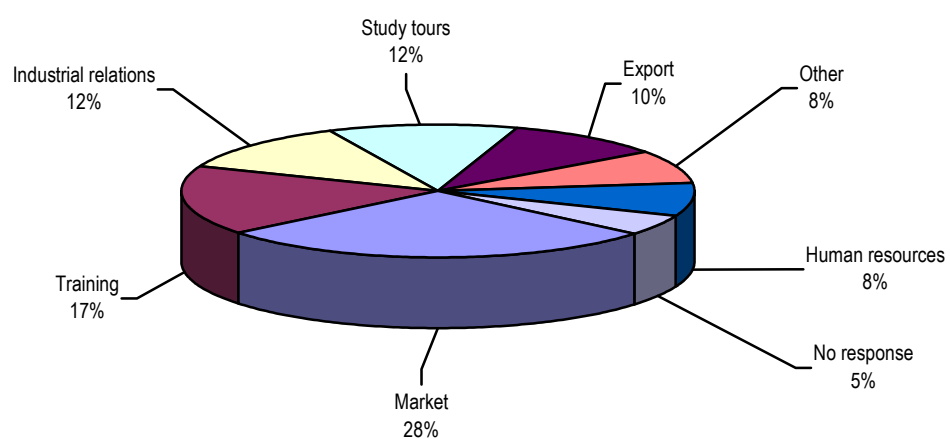
No further detail was sought in relation to specifics under each area as it would be expected the range would be extremely broad.

Full details of responses to this question are presented in Table 6 and Figure 4.

Table 6: Respondents indication of information/assistance type they would like to be able to receive from the Vegetable IDO in the future.

Sort of Information	Total Responses	% of Total Responses	% of Total Respondents (n=69)
Market	47	28	68
Training	29	17	42
Industrial relations	20	12	29
Study tours	20	12	29
Export	17	10	25
Other	14	8	20
Human resources	13	8	19
No response	9	5	13

Figure 4: Respondents indication of information/assistance type they would like to be able to receive from the Vegetable IDO in the future.



Q.2 *Has staff in your business undertaken any training?*

The Northern Australian Vegetable industry has a relatively low level of training of staff, with only 51% of firms indicating that they had obtained training for staff. The level of training that business owners had undertaken however was not determined. (See Figure 5)

Chemcert training (18 responses) was the most responded to area where training was undertaken by industry. After this there was a variety of training areas identified which have relatively equal levels of responses. These are summarised in Table 7

Figure 5: Has staff in your business undertaken any training?

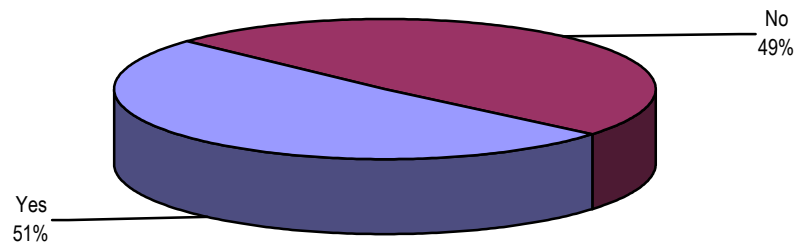


Table 7: Training descriptions

Training description	No. of respondents	% of Total (n=37)
Other	20	54
Chemcert	18	49
Quality Assurance	6	16
Freshcare	4	11
Workplace Health & Safety	4	11
Water for Profit	3	8
Rural Leadership	3	8
IPM	3	8
Future Profit	2	5
HACCP	1	3

Q.3 What training would you consider important for yourself and your employees in the future?

There were 5 principal areas where industry identified it required further training, the principal ones being pest and diseases (identification presumably although not tested), quality assurance and environmental management, Chemcert, Business Management and finance and Farmcare (a on-farm environmental management tool).

Presently, the IDO's are not suitably equipped to deliver a wide variety of courses in any of these areas. Additionally, a focus on any one area may result in other training areas being poorly addressed. As a result it suggests that the IDO's principle role in regards training should be the facilitation/promotion of service providers to link with producers to undertake training. Other consultation data suggests that in many instances the reason why producers do not themselves undertake training or have staff do same, is the fact that they find it difficult firstly to obtain service providers due to the fact that they are busy with current day activities and secondly, where group participation is necessary being able to organise same.

Some of these roles/services may also be undertaken/facilitated by industry organisations (such as QFVG) and the direct linkage between current day Vegetable IDO staff and that organisation suggests that certain economies of operation may be applicable.

Full survey response details are presented in Table 8

Table 8: Future training requirements			
Training	Total Responses	% of Total Responses	% of Total Respondents (n=69)
Pest and disease	47	23	68
Quality Assurance & Environmental Management	42	19	61
Chemcert	39	13	57
Business management and finance	32	21	46
Farmcare	26	16	38
Other	13	7	19
No response	2	1	3

PART D: SPECIAL INTERESTS

Q.1 What special interests do you have with your business?

Industry provided an extensive list of areas in which they have special interests to either undertake further study, undertake further training and/or investigate as an alternative business opportunity. A number of these special interest groups have already been facilitated into “Special Interest Groups” by the IDO’s. The highest interest areas are in Quality Assurance and Environmental Management, Organics, Greenhouse and Hydroponics (see Table 9)

Presently, there exists a number of external resources and/or sources of information pertaining to these areas. It is recommended a dossier of information and service providers may be compiled and distributed in the most efficient manner possible. If sufficient interest is then generated in regards the information provided, further investigation of the applicability of special interest groups should be investigated.

Table 9: Respondents special interests with their business			
Special interest	Total Responses	% of Total Responses	% of Total Respondents (n=69)
Quality Assurance	34	22	49
Environmental Management	27	18	39
Organics	21	14	30
Hydroponics	15	10	22
Greenhouse	13	9	19
Training	12	8	17
No response	11	7	16
Nursery	10	7	14
Other	8	5	12

A range of other special interest areas were amalgamated together under ‘Other’. A further breakdown of the responses in this category are provided below in Table 10

Table 10: Other special interests
Production issues
Value adding, accountability of NRA (Chemical)
Marketing, staff organisation
Pests & diseases, crop nutrition, harvest timing & plant condition/reserves
Best practices for better yields in horticulture
Pest management, marketing
New Asian vegetables

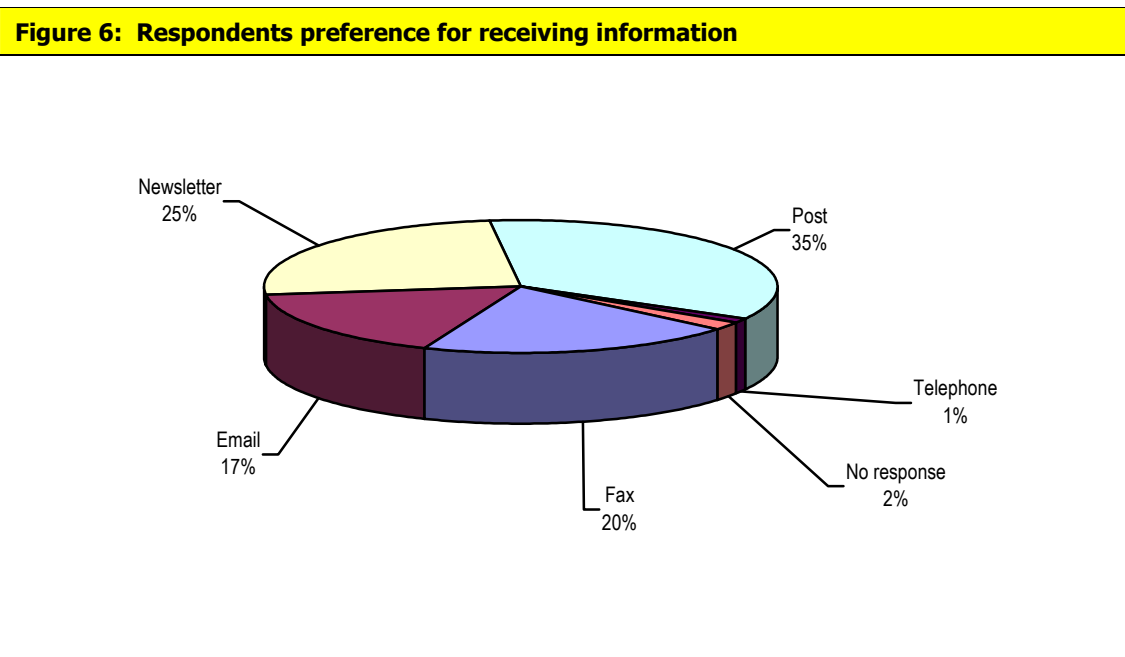
Q.2 How do you prefer to receive information?

Thirty-five percent of the Northern Australian vegetable industry still prefers to have information communicated to it via mail, with the other major responses being newsletter, fax and email.

This survey confirmed that newsletters such as Vegetable News (and presumably Queensland Fruit & Vegetable News) are highly regarded methods to disseminate

information to industry. It is therefore recommended that this form of communication should be maintained in any future information dissemination role for IDO's. Further email and facsimile are important information gathering tools for certain segments of the industry. The Vegetable IDO's made fair use of both of these techniques but the development of databases and use of Faxstream to send information should be investigated and implemented further in future projects.

Table 11: Respondents preference for receiving information			
Information receipt preference	Total Responses	% of Total Responses	% of Total Respondents (n=69)
Fax	21	20	30
Email	17	17	25
Newsletter	26	25	38
Post	36	35	52
Telephone	1	1	1
No response	2	2	2



Milestones

Milestone 1

Signing of research agreement. Project management and evaluation process and team established. Vegetable industry development service in place.

Criteria

- Project management process agreed upon.
- Project focus group representation confirmed.
- Consultancy agreement, terms of reference and contract prepared.
- Project evaluation consultancy in place

Outcomes

A structured workshop process was developed to be used within a cycle of regional meetings and interviews with growers and others in the demand chain, with a view to achieve empowerment and motivation through discovery of industry and individual enterprise level issues which if addressed would lead to enhancement of performance at both levels.

Management of the process has been vested in the Program Manager – Vegetables, Tomatoes, Heavy Produce and Melons. Appropriate role relationships between the governance and policy development role of the committee members and project management by the project team was negotiated.

The project focus group comprises the representatives to the national vegetable research and development program, Queensland Department of Primary Industries Horticulture Industry Development Committee and the Queensland Horticulture Institute. Representatives from Northern New South Wales and the Northern Territory were not included until the first round of consultations were completed, and the project methodology be demonstrable through tangible and illustrated outcomes.

Contracts were completed with University of Queensland – Research Development and Extension Connections to provide one field officer, and time commitment of an agricultural economist and an experienced senior lecturer in rural extension, so as to complete the skills matrix required. Contracts were also completed with Pinnacle Management to provide a field officer and time commitment of a consultant of a higher level of training and international experience – again to achieve a higher level of skill than would normally be achieved in a sole officer.

Each contract has flexibility for QFVG Ltd. to engage extra time commitment and to undertake additional activities associated with the project as needed, with cost borne directly by QFVG Ltd. – this has enabled activities beyond the authorised scope of the project to be undertaken. Similarly, this has enabled integration of other projects and activities to be integrated with this project.

Project evaluation consultancy has not been achieved, as the focus group and project team considered that a trial in the field should first be undertaken, and then consultancy be engaged to assist develop a self-evaluation method.

Milestone 2

Completed first packages of information and technology transfer projects and resources. Information and technology transfer and communication program for Queensland, Northern New South Wales and Northern Territory negotiated.

Criteria

- Consultation methods, program and schedule for undertaking Northern Australian region component for development of Australian Vegetable Industry Development plan agreed.
- Consultation methods, packages delivery, and follow-up methods negotiated
- First information packages delivery methodology, project proposals, and costing prepared
- Participation in planning Australian Vegetable Industry Plan, Communications Strategy, technology adoption strategy, and other national industry projects.
- Evaluation method prepared
- First information and technology delivery projects initiated
- Program calendar published and distributed

Outcomes

Methodology and program of activities was negotiated with the project focus group, regional grower groups, government agencies and service providers, so as to bring an inclusive ownership to the program. The program was published as advertisements and copy in Fruit and Vegetable News, regional newspapers, and local radio. Regional workshop findings were published as media releases in regional newspapers with a view to striking industry identity and commitment to their regional findings, and to communicate with non-participants and the larger community.

As the first regional activities commenced within only two months of the 31 August concept development proposal date, an interim report of regional meetings was distributed to the research community and negotiation undertaken in respect of prospective new projects with researchers in all Australian states.

Information packages specific to regional crop, geography, and known issues requirements were prepared as the project commenced. These were distributed at meetings, interviews and by mailout. Particular information required by all areas was consumer market research – summaries of existing extensive QFVG Ltd. consumer market research were prepared into Vegetable Notes and placed on the web and Prime Notes. The availability of these was publicised to growers through two special editions of Q Vegetable News, which further summarised these reports to readily readable overviews of main results and key messages. These were funded directly by QFVG Ltd. as it wishes to retain intellectual property of the consumer market research.

Project team members participated in the national vegetable research and development program processes for briefing of committee members and in the CDP evaluation workshop. A dialogue and sharing of resources with the other vegetable industry development officers was continued.

Team members also participated in the development of the Australian Industry Development Plan.

Milestone 3

Established system to routinely provide strategic management information to decision making committees.

Criteria

- Negotiated with national industry development network on information gathering, information exchange, analysis process and continuity procedures.
- Conducted first inclusive consultation series.
- Delivered first packages of analysed strategic information to regional representatives and to national program.
- Established and applied process of review of programs and projects within network.

Outcomes

Participation by demand chain stakeholders

The structured regional workshop and interviews process was effective in empowerment and motivation of participants through discovery of industry and individual enterprise level issues. The concept of facilitating discovery by participants enhanced ownership of industry-wide and individual enterprise issues. Follow-up has seen regional action on a number of issues actually at regional instigation.

The process empowered growers and others to develop senses of direction for the future of their businesses and the industry. The workshop participation translated into participation in follow-up pilot projects namely Futureprofit, a resource which assists growers and their staff identify the skills and resources they need for the future, and Futurefocus, which aim to connect growers with skills, resources, and business planning processes. Similarly follow-up assistance has been given with accessing other Commonwealth and State programs.

An unexpectedly high level of attendance and participation resulted, in which strong senses of industry identity, community, and direction were created. Growers who have not participated in industry organisation activities within the traditional local producer association structure participated willingly and gained benefit from association with others. Similarly, opening the process to others in the demand chain has prompted continuing local interaction and synergy. Clearly, a structured approach offering information and taking information into industry planning is well regarded, and draws participation. When a specific task or issue needs advancement or having a say in your industry is offered, participation is greater.

Development of industry identity, focus and direction

The process has assisted growers identify skills and resources needed for future business development and planning. Follow-up has included trials of the Future

Focus resources and Futureprofit program. These will be developed further as project proposals.

Group process has overcome insularity and promoted sharing of information and comparison of practices.

A clearly enunciated set of issues which require action at strategic and operational level for individual businesses, industry organisations and the national vegetable research and development program has been developed. These form a workplan. A number have been allocated to particular agencies for development of strategies, and projects, and issue champions.

Review of a comprehensive list of past and current research and development projects by growers invoked common comment that the industry wants more industry development than research, and a greater emphasis placed on research and development which actually achieves business sustainability and profitability outcomes.

The leading issues identified by growers and other participants for enhancing development of the industry at individual enterprise level are (a) greater capability in the demand chain, (b) marketing skills, (c) business development skills and (d) management skills. A common underlying issue is inadequate opportunity and capability to readily identify and to access resources for improvement – our hypothesis is that growers require a higher level of mentoring or tutoring in needs identification and accessing resources, for a range of reasons. This is being taken up in the best practice group activities.

Motivation to seek further information and access to resources

The regional activities and the information packages prepared according to crop groups and geographic area mix have prompted further inquiry and use of existing and current research and development information, and desire to access other information sources. Obvious motivation to access information has resulted. Growsearch, an existing Queensland Department of Primary Industries information research gathering and dissemination service, was used in developing packages and has assisted growers to access other information readily and economically. It is now an integral partner in the project planning and delivery, so that information that growers want and need is well understood by the service.

Strenuous criticism was levelled at the research and development community for perceived poor delivery of research and development. Within this project contact has been made with researchers to deliver results to growerland according to their expressed information requirements and crop profiles. This criticism appears to be based on lack of information about what research and development has been done, inadequate access, inadequate connection to growers own situation, and may even indicate inadequate badging that the work in industry levy funded. Growers do not connect with organisations such as HRDC and Ausveg, and therefore do not recognise their role – any connection is with the service supplier.

Leadership and decision-maker empowerment

Participation in the process has empowered the vegetable research and development committee members to have a greater understanding of industry requirements in preparation for the concept development proposal process, and in project initiation processes. A number of strategic project briefs have been commenced including market development, demand chain capability, marketing groups, management and marketing skills, and benchmarking.

A benefit from inclusion of members in the meetings and interview processes has been empowerment of the committee members with confidence and connection with the larger industry in a genuine industry leadership role.

Better preparation and greater objectivity in project initiation and in project evaluation has been demonstrated.

Best practice groups and action groups

Best practice groups have been formed regionally, across regions, and as specific crop groups to tackle common issues and problems, and common desire to develop as an industry group. Groups in place now include environmentally safe produce, sustainable production, asian vegetables, hydroponic vegetables, organic production methods, and regional groups in Ballandean, Boonah, Lowood, and Gumlu. Cross region groups have been initiated for chokos, beans, and carrots.

Groups have also sought assistance in gaining access to past and existing research and development and information from sources external to Australia.

The principal reason for forming has been to develop demand chain skills and capability, marketing skills and marketing groups. The first two are well within the scope of the best practice concepts of this project; however, the desire to form marketing groups has been limited to assistance with acquiring the skills, processes and practices needed by the growers to advance this form of structure, and assistance to connect effectively with agencies which provide a higher level of assistance.

Integration of other initiatives

The concepts of industry development as described in HRDC Review of the Roles of Industry Development Officers, HRDC Industry Development Manager and Industry Development Officer Policy, and Guidelines for Employment of Industry Development Managers and Industry Development Officers have provided a focus for process and structure to be developed, so that industry development and industry performance enhancement may be undertaken in a systematic way.

This project has brought greater focus to a range of QFVG Ltd. vegetable industry activities, and is now the structure and process which underpins and integrates a number of projects and activities into a vegetable program. Human and other resources have been realigned to be integrated into this program management approach.

The structured activities program has allowed integration with other QFVG Ltd. and other agencies programs and services, and has allowed sharing of resources. The process has provided discovery of need and justification for future initiatives and services which may be sought from other agencies and funding providers.

Bottom line - discovery of need for change

Thus far the project is providing a significant peer group forum for participant self discovery of the need to acquire information, increased skills, and future focus, and motivation to initiate change and improvement.

Best Practice Groups Identified

The service of developing alliances to work towards best practice operations is offered as a component of this project and has been enthusiastically received by vegetable growers in Queensland. Best practice development is designed to address the leading issues identified by growers and other participants for enhancing development of the industry at individual enterprise level, these are (a) greater capability in the demand chain, (b) marketing skills, (c) business development skills and (d) management skills. Three defined groups are currently involved in best practice group development, these are the Gumlu Produce Alliance in North Queensland, the South Burnett Small Crop Grower Alliance and the East Coast Alliance.

Gumlu Produce Alliance and the South Burnett Small Crop Grower Alliance are working towards the same goals, namely, where they need to focus to ensure a future for their businesses. Group initiation process involved an Industry Development Officer to facilitate group goal identification and action needed to achieve these. Overall, these groups want to create an awareness of products that are needed and the appropriate strategies to adopt, to ensure their enterprises have a future in the food industry. Activities undertaken are predominantly adult learning and it is ensured that they are practical and applicable to real life business situations. Both groups are still in the process of determining options for their future, including whether they will develop into enterprise partnerships or continue as individuals.

The East Coast Alliance is a cross regional group, involving enterprises in Bowen and the Lockyer Valley. The resulting alliance between the two regions aims to develop a category management approach and work closely with chain stores. The role of the Industry Development Officer with this group is both as a facilitator and project consultant. This process has only recently been initiated and actions are still in the planning stages.

Funding Initiated and Service Providers Approved

The service provided by this project is facilitatory and to ensure group action plans progress and are sustainable for the future of individual businesses, funding has been sought from sources external to the budget of this project. The proposals are written by the Industry Development Officer in consultation with the best practice group. This funding is invested to utilise service providers with the necessary skills to continue helping the groups work towards their goals. This approach to best practice

development is necessary to move the groups towards self reliance. In all cases the Industry Development Officer steps back, but is still kept in the loop of activities and kept up to date with progress, but can also move on to help initiate other best practice groups.

As all of the best practice groups have only recently initiated, the issue of group maintenance and continuity has not yet been addressed. When the situation arises it is been planned that service providers with the skills in these areas will be funded to ensure group behaviour is sustainable and profitable for business developments.

Newsletter published

The project is currently publishing Issue 7 of 'Vegetable News'. Topics covered range from market and consumer research to research and development investment. This publication has been very well received by the industry as it has contained information addressing needs and issues raised from the regional growers meetings and best practice groups. For example, Issue 5 reported on selected vegetable research with the opportunity for readers to seek further information on projects by faxing back a request form. There have been around 50 requests received from this publication alone, which has prompted the project team to develop other information services through the project, which have been just as successful. The newsletter has enhanced the work of the project and has been an effective means of communicating the information to all growers for maximum industry benefit.

Milestone 4

Information and technology transfer and communication for Northern Australia region integrated with industry development planning reviewed and refined.

Criteria

- Completed second series of information and technology transfer packages.
- Second information packages delivery and follow-up program initiated.
- Second series of information and technology delivery projects initiated.

Outcomes

Targeted information packages developed and delivery initiated.

The second series of regional meetings and workshops had been successfully addressing the needs and issues identified in the first series of meetings. There have been a number of activities within this approach, targeted to the whole industry: Vegetable Growers – Meeting Your Needs workshops, Vegetable Project Development Workshop, Vegetable Growers – The Changing Face of Horticulture (Issues and Future Directions for Queensland Vegetable Producers) and the Audit Report of Producer Group Activities.

Every region has been visited at least once in the follow up series and feedback has and is determining what services need to be fed into the areas.

Vegetable Growers – Meeting Your Needs – This series of workshops has the primary aim of increasing the awareness of information sources and services that are already available to the industry. A strong message from the needs and issues raised in the first series of workshops was that this awareness is very poor and hence, very concerning. The approach is to deliver details of where to and what to access and encourage self motivation for discovering answers and asking questions, while always providing assistance where necessary. Industry feedback has been very positive and appreciative. The method used is structured, strategic and tailored to suit each individual region.

Vegetable Project Development Workshop – A workshop was held for service providers of the vegetable industry. The aim was to make them aware of the needs and issues that have been raised by the industry stakeholders and to encourage an increase in industry cohesiveness and project development. Feedback from participants of this workshop was very positive and outcomes included potential project teams (across organisations and states) and Concept Development Proposals (CDP's) developed and submitted for HRDC funding consideration.

Vegetable Growers – The Changing Face of Horticulture (Issues and Future Directions for Queensland Vegetable Producers).

Results from the first series of regional workshops (needs identification), showed a desire for producers to develop a greater understanding of issues beyond the farm gate and in particular, those associated with business and market development.

Vegetable Growers – The Changing Face of Horticulture (Issues and Future Directions for Queensland Vegetable Producers), is a series of information evenings held in vegetable production regions. The presentation and discussion addresses marketing and business issues beyond the farm gate, which effect long term business viability now and in the future. Details of programs and services available to help producers address these issues, both offered through the Vegetable Industry Development Service – Northern Australia (VIDS) and external sources are included.

A focus on case studies and real businesses has greatly assisted in linking what many producers believe to be just theory and what is actually happening in the commercial world of vegetable production and marketing.

A full round of presentations will be completed by February, 2000 in all production districts in Queensland and Northern New South Wales.

Audit Report of Producer Group Activities

The formation of alliances has been identified as a prime focus area for vegetable producers to achieve international best practice and maintain market share.

An audit of producer alliances was carried out to determine a range of critical issues for successful alliance formation. These results have been communicated via a number of methods such as part of a presentation at the Growing for Profit Day (VG98133) and contributing to the 'The Changing Face of Horticulture' presentation series.

Practical and effective distribution of these results will continue over the next few months via industry magazines, newsletters and utilising the Industry Development Officer network for national vegetable industry benefit.

The Northern Territory – a different approach.

The Vegetable Industry Development Service – Northern Australia is responsible for assisting vegetable growers of the Northern Territory. The majority of these producers are of Non English Speaking Background, mainly Vietnamese. This poses a cultural hurdle for the Industry Development Officers and hence has been approached in a different manner.

The project team has collaborated with a project called 'Pilot project on Extension and Communication with Asian Non-English Speaking Background (NESB) Vegetable Growers for the adoption of Best Practices' (joint funded by RIRDC and HRDC). This project has a Vietnamese speaking Communications Officer (CO) in Darwin to communicate and build up a level of trust with the Vietnamese growing community. The VIDS is providing support to the CO in the way of information, resources, national representation and funds to help develop educational and training needs. For example:

- we are currently discussing the development of a pest identification poster to assist the growers in their crop management, especially working towards the better use of

chemicals. This poster would have practical use in most vegetable growing regions of Australia and will definitely be applicable to other Vietnamese growing regions.

- Translated information from a Vietnamese field day in Brisbane is currently being copied and distributed for use in the Darwin area.
- The needs and issues of the vegetable growers in the NT are collated and communicated at a national level by the IDO.
- The two projects are actively collating NESB material from all over Australia and encouraging other projects addressing this area to keep in touch. This is creating a network and resulting in easier information access for the NESB growers and project team members. This will benefit NESB growers Australia wide. The NT team are conscious not to 'reinvent the wheel' and to effectively use what is already available.

Project Initiation

The Vegetable Project Development Workshop aimed to make vegetable industry service providers aware of the needs and issues the vegetable industry has and to encourage an increase in industry cohesiveness and project development.

Addressing information and research gaps was a primary focus. Many of the resulting CDP's submitted to HRDC for consideration addressed these areas, but there was no guarantee of funding available. The workshop also encouraged the potential project teams to seek funding outside of the Vegetable R&D levy where possible.

The VIDS has also initiated it's own projects. Most have funding external to the HRDC and have appropriate consultants contracted to carry out the project activities. While these projects are essentially external, they are under the direction of the VIDS to ensure a focus on Industry Development and work towards larger industry goals.

Examples of projects which have been undertaken, commissioned or are in the process of commissioning include:

- ? South Burnett Small Crop Growers Alliance
- ? Gumlu Producers Alliance
- ? Gympie Packhouse Market Development
- ? Kool Country Packers Ballandean
- ? East Coast Vegetable Producers Alliance
- ? North Queensland Taro Alliance
- ? Sweet Potato Producers Alliance
- ? Best Practice Handling of Beans (co-jointly funded by HRDC)
- ? Vegetable Prepackaging Research Project

Each of these projects aim to encourage, motivate and empower producers and other participants to achieve long term business sustainability.

Industry Benefit

The information packages and project initiation carried out by the VIDS is facilitating the enhancement of industry capability and performance to a higher level at the individual, local, regional, state and national levels.

Milestone 5

Maintained liaison networks and grower best practice groups.

Criteria

- Best practice target topics, goals and geographic and other groupings reviewed and revised.

Outcomes

Target topics and goals

Business and market development is the area of focus (target topic) for best practice groups in the Vegetable Industry Development Service – Northern Australia (VIDS). This focus was identified from the collaboration of a number of information sources, namely:

- *Regional vegetable growers meetings and workshops*
- *One-on-one meetings with producers and industry development staff*
- *The QFVG Ltd. Vegetable Committee*
- *Government agencies reports, and*
- *Developments associated with the international and domestic market for vegetables*

Elements of the range of services to achieve best practice include:

- (a) achieving greater capability in the demand chain,
- (b) improvement in marketing skills,
- (c) greater business development skills and
- (d) improved business management skills.

A primary aim of the Best Practice groups is to achieve long term enterprise viability and profitability by lifting individual business performance. By lifting individual capability and performance, the performance of the entire horticultural industry improves.

A review of the progress and achievements of the best practice groups has reinforced that this service is needed in the vegetable industry within Queensland. The project team has been working with the Best Practice groups to develop focus, initiate projects so the groups have funding and help facilitate the development of skills they may require to be successful and sustainable eg. interpersonal and business knowledge.

Geographic distribution and groupings

This project aims to establish at least one Best Practice group in each major vegetable production region in Queensland and Northern NSW by July, 2001. These will serve as regional case studies and are effective in demonstrating best practice to other producers. However, the Best Practice groups have been, and will be, initiated on an as needs basis with determined goals and focus, and will not be initiated just for the sake of it. The outcomes from these case studies will be published and distributed to a wide industry audience in 2001.

Industry consultation and research has also indicated that in order to achieve viable, long term positions in export markets, the formation of business and marketing alliances across state boundaries is critical. The project team has led discussion and planning sessions with the Virginia Horticultural Institute, South Australia, who have expressed similar concerns to address this issue. It is suggested that a demand chain alliance pilot project across Queensland and South Australia boundaries be initiated. This pilot project will also serve as a case study to be disseminated to the vegetable industry.

Table 1 outlines the Best Practice group case studies and their focus. It is expected that more best practice groups will be identified and assessed in the near future.

Table 1. Potential Best Practice Group Case Studies.

Best Practice Group	Location	Potential Focus
Gumlu Producers Alliance	North Queensland	Process for building market and business capability of a small producer group.
Kool Country Packers	Granite Belt	How to build and maintain an alliance.
South Burnett Small Crop Growers Alliance	Southern Queensland	Assist a group to build a packing facility and undertake conjoint marketing.
Environmentally Sustainable Produce	Lockyer Valley	How to respond to a particular market niche.
Lockyer Bean Alliance	Lockyer Valley	How to undertake a Product Development Strategy.
Gympie Pack House	Gympie	How to undertake remedial action of an existing alliance.
Asian Vegetable Product Development	Brisbane	How to develop a product category in the market place.
Chinese Cabbage (Wombok) to Japan	Granite Belt and Fassifern Valley	A method to respond to a market opportunity at producer level – an example of chain reversal.
Fassifern Carrot Alliance	Fassifern Valley	How to develop and maintain market access for fresh produce.

Industry benefits from Best Practice group achievements

The industry benefits from the Best Practice groups will include:

- **Significantly improved individual and industry awareness of the best practice requirements in business and market performance**
- **Improved financial performance through improved sales returns and quantities**
- **Improved business operation and efficiency through the adoption of new production technologies, information technology and market awareness**
- **Formation of inter-regional and cross-regional linkages resulting in greater competitiveness in the marketing chain**
- **Increased awareness of new and innovative of packaging and presentation technologies**
- **Identification of new crop alternatives for certain regions**
- **Improved export sales of certain horticultural products**
- **Improved information exchange and communication amongst the horticultural sector**

The focus of individual case studies will depend on the group focus and what they decide will be most beneficial for their business success.

Information Dissemination

Best Practice outcomes and progress are being communicated to the vegetable industry via Vegetable News, the Queensland Fruit & Vegetable News, general meetings and industry events such the Growing for Profit. In addition, producers in regions where the Best Practice groups are established are ‘looking over the fence’ and monitoring progress and success themselves.

The best practice case studies will be the foundation of a series of reports with recommendations for alliance development to be published and distributed in 2001. They will be transferable to other horticultural industries and commodities with national application.

Milestone 6

Information and Technology Transfer Strategy and Communication process reviewed.

Criteria

- Completed 3rd series of information and technology transfer packages.
- Consultation methods and packages delivery/consultation and follow-up program agreed.
- 3rd information packages delivery and follow up initiated.

OUTPUTS AND OUTCOMES

The third series of information packages have been identified and delivery has been initiated. They will service a wide audience and target the whole vegetable industry chain. Experiences from previous information packages disseminated by the project team have been the foundation for their development. The third series of information packages are:

1. The Vegetable update database
2. Resources initiated to assist in business development
3. Best practice case study reports

The information packages focus on easy access to information sources and services. The project activities now include many demand chain stakeholders in the information loop and the initiation of projects and services. This is proving valuable for project development, accessing expertise and putting growers in touch with other stakeholders for business to business benefits.

Vegetable Update Database

The Vegetable Update Database is a web based database used to store and manage the information that the Vegetable Industry Development Officer's receive, and any additional information that is useful to the industry. It also creates targeted information resources to be disseminated to the vegetable industry. The database is near completion and presently, information is being entered. It will be accessible by the whole vegetable industry 24 hours a day via the Internet and over the telephone during business hours to request information searches and have it sent by mail or fax (for those who do not have access to the Internet). The format of the database is in response to vegetable producers request for easy to access information summary's that direct them to where they can access more information.

Benefits of the database include:

- Quick and easy access to information and services available to the whole vegetable industry.
- 24 hour a day access.
- Efficient use of resources for information storage and management.
- Ability to easily download and distribute targeted newsletters.
- Increased knowledge of information and services available to growers and other industry stakeholders.

Appendix 1 details more information about the database, including the format and the type of information that is entered.

The database will also have a portable version that the IDO's will carry on their lap top computers to show industry stakeholders on their regional visits. In addition, they will assist and encourage any producers who are not comfortable with the Internet to access the information. It is expected that these visits will commence in October 2001.

Applications Submitted for Funding

The VIDS project has worked with a number of grower groups to submit applications for funding. These are:

1. Gympie Local Producer Association – Development of regional industry plan and formation of regional group.
2. Gympie Packhouse – Improve group relationship methods, and collaborate group marketing.
3. East Coast Bean Alliance – Best Practice Bean Handling Project. Bean pre-packaging research.
4. South Burnett Small Crop Growers Alliance – Group marketing skills development.
5. Eco Foods Group – Best practice integrated agri-aquaculture fertigation to minimise environmental impacts.
6. Fassifern Packers Group – Regional marketing.

Resources initiated to assist in business development

This project has initiated services to assist vegetable producers improve their level of business development and capability. These are in response to the needs identification work and filling in the gaps that exist in services offered to the industry.

1. The Market & Business Capability Assessment Service – This service assists vegetable producers to identify their needs and the appropriate sources of assistance which can be accessed to meet them.
2. Future Focus – This is an easy to use questionnaire that helps growers pinpoint their future direction and then assess the skills they will need to get there. It covers business performance, personal skills, future directions for farm business, strategic planning skills and succession planning, business management skills, farm management skills and attitude learning.
3. Working in Groups – A program that assists groups to work together. It includes identifying strengths, weaknesses, opportunities and threats.
4. Market and Business Capability Development Application Service – A hands-on service tailored to the individual needs of producers or that of producer groups which allows them to take stock of where they are now and helps them to plan for and get to the business future they want.
5. Market Opportunities for Businesses – This service provides a business matching service linking vegetable producers with customers, either overseas or within Australia.

Best Practice Case Study Reports

Selected grower groups that have been involved in developing and submitting project applications for funding and have participated in the business development services, are being used as case study examples for the best practice reports.

Seven projects have been selected as Best Practice case studies. Each of the seven projects are concerned with Supply Chain Management, Marketing and Business Capabilities, and/or Producer Alliances, all identified as key areas for enhanced industry performance. The seven case studies are:

1. Kool Country Packers Ballandean
2. Wombok to Japan
3. Eco Foods
4. Gympie Packhouse Redevelopment and Marketing
5. South Burnett Small Crop Growers Alliance
6. Red Coral Lettuce to Japan
7. Bean Prepackaging Research Alliance

The case studies will be reported in several formats including: full report; summary report; presentation style; and poster style. The full report will outline the relevant current industry practices and best practice standards, an outline of the project and a detailed account of the processes and practices adopted in the course of the project that are identified as processes or practices that would contribute to enhanced industry performance. It is anticipated that all seven case study reports will be completed by March 2002.

As the Best Practice case studies are behind schedule, a supplementary milestone will be submitted and will address progress made on the development of, and detail the delivery of the Best Practice case study reports and the Best Practice Module. It will also include a detailed description of the process used in developing Best Practice case studies.

Similarly a second series is being planned for delivery by June 2002, and will include:

1. Development of Disease Forecasting Models.
2. West Farms Grower Network.
3. Fassifern Packers Group.
4. Environmentally Safe Produce.
5. East Coast Bean Alliance.
6. Gympie Local Producer Association.
7. Cucurbit Prepackaging Research Project.
8. Asian Vegetables Product Development.
9. Northern New South Wales Producers Alliance.
10. Australian Bean Producers Alliance.

Project Evaluation

A mid term project evaluation has been completed. The Executive Summary is in Appendix 2. In brief, the recommendations from this report are:

- A more extensive evaluation is needed to measure increased knowledge and awareness; reactions and practice change as a result of the project.
- It is recommended that an economic analysis be conducted, as outlined in the original proposal.
- More attention be given to servicing the Northern Territory and Northern New South Wales.
- The term 'Northern Australia' should be used more on general project material that is produced.
- It is recommended that the services and activities provided under the VIDS Project should be clearly identified as such.
- All activities involving industry participants should be evaluated to provide ongoing monitoring.
- Reports from VIDS Project case studies should be disseminated to industry participants.

This evaluation will be used to ensure an ongoing project monitoring plan is in place and will be the basis for the final project evaluation. The evaluation was commissioned by QFVG for development of project management resources to be used in continuing projects and has not been an expense against VG98121.

Action to Address Recommendations

All recommendations from the Evaluation report are being addressed. This includes:

➤ *Economic Analysis*

An Economic Analysis has been initiated for the VIDS project. Morton Rural Advisory Service will carry out the analysis. An update on the analysis will be reported in the supplementary milestone.

➤ *Northern Territory*

A meeting date has been set for August 16 – 17 at the Northern Territory Department of Primary Industries and Fisheries. Participants will be all stakeholders involved in the vegetable industry in the NT, including Katherine. The agenda will include how the Vegetable Industry Development Service Project can increase its support and activity in the NT to assist the vegetable growers and share more resources.

Queensland representatives will be Samantha Heritage, Vegetable IDO, and Noel Harvey, Vegetable Program Manager. An update on the activity in the Northern Territory will be reported on in the supplementary milestone report.

➤ *Northern New South Wales*

Telephone discussions have been held with key contacts in Northern NSW to organise a meeting time to discuss where the VIDS project can increase its assistance and support to these vegetable growers. The growers will discuss a suitable date at their next AGM (August 8th 2001) and will contact QFVG to organise a time and place.

Vegetable Update Database

BACKGROUND

What is the Vegetable Update Database?

The Vegetable Update Database is a web based database used to store and manage the information that the Vegetable Industry Development Officer's receive, and any additional information that will be useful to the industry. It will also create targeted information resources to be disseminated to the vegetable industry.

Why Develop a database when there are other ways to do the same thing?

The database has been developed in response to the vegetable industry needs, particularly the need to access the huge array of information in a simple and easy to read format (as opposed to receiving many research papers and updates that will never get read).

Having it located on the Internet allows 24 hour a day access by all industry stakeholders. They can download and print any documents they chose. In addition, it encourages and allows the growers to seek the information for themselves, and provides the option of accessing more information or not. A typical comment from growers has been:

'Just tell me what information is out there and where to get it, and I'll go and get it if I want to'.

This database does just that.

What about the growers who don't have access to the Internet or know how to use it?

The growers who don't have access to the Internet or know how to use it, will still be able to access the information. They only need to call one of the Vegetable IDO's or other members of the Vegetable Program Team at QFVG, who will search the information on their behalf, and either mail or fax the information searches to the grower.

The IDO's will have a sample version on their laptop computers to show growers and other industry stakeholders when they visit vegetable growing regions.

Who is the target audience?

The target audience for the database is the Australian Vegetable Industry, including the growers, service providers and all value chain participants.

OUTPUTS

- A database used to store, manage and search useful industry information, accessible by the whole Australian Vegetable Industry.
- Targeted newsletters and information resources disseminated to specified audience sectors.

OUTCOMES

- An increase in knowledge of services available and information sources that will enable the vegetable industry to make more informed management and investment decisions.
- An increase in awareness of Vegetable R&D Levy supported projects and their outcomes and industry benefits, which will also assist in identifying industry R&D priorities.

DATABASE EVALUATION

Evaluation and monitoring of the database is a continual process. It is vital that all team members and industry stakeholders actively participate in this process. This information will be used to improve the database.

The methods of monitoring and evaluation include:

- Feedback and comment sheets completed on the web site
- Information recorded from the web site such as number of hits, duration of use, and any other information we can collect.
- Feedback sheets completed when the IDO takes a request over the phone.
- Feedback from one on one visits with industry stakeholders.

SO HOW DO I USE THE DATABASE TO BENEFIT ME?

If you are a grower or other industry stakeholder:

You will have instant access and be able search the huge array of information on the database and will be able to read it in simple summary form. If you want more information on that particular topic, you just need to click on the 'contact' details and request more information. Depending on the contact, it may cost you a small amount in photocopying and postage.

If you don't have access to the Internet you can still access all of the same information over the phone, it will just take a longer to get to you through the post.

If you are a vegetable program team member:

Having your information on the database is a quick and easy way to direct many people to the information at once, without having to spend time scurrying through files, looking up phone numbers or photocopying unnecessary multiple copies. You can direct people to the database because you know that the information is on there, and it is most likely that you will know what the article is titled. In addition, you will also be able to up load full word documents and any associated pictures that are related to the summary that you provide – just imaging how much time this will be able to save you!

VEGETABLE UPDATE DATABASE TEMPLATE

This template is intended for you to use to submit data for the Vegetable Update Information Database – a project initiated by the Vegetable Industry Development Service Northern Australia (VG98121).

When you receive or come across information that is beneficial to the vegetable industry, please summarise it in your own words – unbiased – and complete all fields below and email to Samantha Heritage at sheritage@qfvg.org.au for inclusion in the database.

DATE	Today's date
SUBMITTED BY	Your name here.
CATEGORY	List of category's provided on the next page
TITLE	Title of the article or report.
SOURCE	Where did the information come from? Eg. Magazine? Journal article? Please provide <u>full bibliographic</u> reference.
KEY WORDS	What key words should be used for people to find this article in the database?
CONTACT DETAILS	Where to go or who to contact for further information regarding this information or service? Name, organisation, address, phone, fax, email and website.
SUMMARY	150 words maximum. Who, How, Why, What, Where, When. What is the industry and individual grower benefit of this information? Get straight to the point.
DATE ENTERED INTO DATABASE	Use by Samantha Only.

List of vegetable Update database Categories

Business Planning and Development	Information Services	Production – Irrigation	Postharvest Management – General
Case Studies	Market Access	Production – Nutrition	Product Development
Consumer Research	Market Development	Production – Soils	Quality Management and Food Safety
Environmental Management	Organic	Production – Sustainable Systems	Self Development
Food Composition	Packaging	Production – Varieties	Supply Chain

Food Processing	Production - General	Production Weeds	Websites
Functional Foods	Production – Harvesting	Postharvest Management – Packing	Hydroponics
Herbs	Production – Insect pests & Disease	Postharvest Management - Storage	Production - IPM

VEGETABLE INDUSTRY DEVELOPMENT SERVICE NORTHERN AUSTRALIA PROJECT EVALUATION SUMMARY

The Vegetable Industry Development Service – Northern Australia Project (VIDS Project) was developed by Queensland Fruit and Vegetable Growers (QFVG) and funded through the Horticultural Research Development Corporation (HRDC). The VIDS Project is designed to develop and facilitate sub-projects that will enhance the performance of vegetable-growing businesses through motivating information and technology information and technology take-up, and through motivating continuous improvement – goals shared with the Australian Government and the Australian Vegetable Industry.

The VIDS Project area is Northern Australia which is geographically defined as vegetable production areas of Queensland, Northern New South Wales and the Northern Territory.

The purpose of this report is to provide an interim evaluation of the VIDS Project's outputs and activities in relation to the stated objectives. The evaluation was performed by desk-top analysis of material provided by the VIDS Project members (Mr Noel Harvey – Project Manager; Ms Samantha Heritage – Industry Development Officer; and Mr Shane Comiskey – Industry Development Officer). To assist in the evaluation process a Logical Framework Matrix (Logframe) was developed (see Appendix A). Section 4 of the report presents each vertical element of the VIDS Project Logical Framework Matrix and comments regarding the achievement of each level.

The VIDS Project has initiated a number of activities and services designed to meet the stated objectives. Data has been gathered for the information and technological needs assessment of the Northern Australian Vegetable Industry through the facilitation of workshops and one-on-one interviews with growers. The needs assessment is in the process of validation through the conduct of a second round of workshops. The resulting reports have been disseminated to key stakeholders and the results incorporated into the National Vegetable Industry Needs Assessment with AUSVEG.

33 project plans have been developed under the VIDS Project Marketing and Business Development Service. 13 of these projects have obtained a funding for a total of \$505,080. The major project areas are business planning, research (production and prepackaging) and several alliances (export, retail, business operations, processing, marketing , QA and general grower alliances). All projects are considered to be in accordance with Industry needs.

A number of services and activities have been identified by the VIDS Project team and a private consultant has been contracted to deliver programs aimed at increasing producers' business decision making

skills and to develop group participation skills towards the development of Value Chain Alliances. A web-based information database is being developed and will be available through the QFVG website by 31 October 2001. The DPI's GrowSearch information service and the Centre for Food Technology are assisting with the collation of the information for the database.

Key recommendations for the VIDS Project are:

7. This evaluation primarily focuses on the physical make-up of the VIDS Project's outputs from the aspect of the provision of services and activities. The ultimate success of this highly participatory project will depend on the impact that implementation of the project has on the producers themselves. For an adequate evaluation of increased knowledge and awareness; reactions and practice change, a more extensive evaluation is necessary, involving direct responses from the industry participants.
8. Output 1.2, the economic analysis of the Northern Australian Vegetable Industry has not been conducted. It is recommended that this be completed as soon as practical to provide validation and direction for the development of industry projects.
9. The marginal regions of the Northern Australian Vegetable Industry – the Northern Territory and Northern NSW appear to be less serviced by the VIDS Project than the Queensland regions. This is evidenced by the lack of activities and services provided to the regions and lack of developing projects. It is recommended that more attention be given to these areas.
10. While it is acknowledged that area-specific detail is necessary for regional workshop presentations, and indeed there may be clear differences in the regions, the use of the term 'Northern Australia' rather than 'Queensland' should be used for general material.
11. There is a lack of clear identification or ownership of the services and activities provided under the VIDS Project. It is recommended that the services and activities provided under the VIDS Project should be clearly identified as such.
12. All activities involving industry participants should be evaluated to provide ongoing monitoring of the activities for improvement of delivery and further identification of industry needs.
13. Reports from VIDS Project case studies should be disseminated to industry participants to assist the up-take of improved processes and practices and provide an impetus for improved industry performance.

Milestone 7

R & D Needs Identification and reporting

The objectives of the milestone were as follows:

- Roadshow of Vegetable Information Database that has been established, where growers and other interested stakeholders can work with the IDO to learn how to use and benefit from the Database.
- Continual Assessment and re-evaluation of R&D issues. Industry issues are also collected, and passed on the relevant organisations (HAL, AusVeg) where necessary / relevant, even where they are not R&D related. This will also include a review of the project over the last 4 years, so as to plan for future work. This can be used to encourage the inclusion of new team members as well as determining grower enthusiasm and potential input into the project.

This milestone is being submitted in two sections, as due to time constraints, not all regions have been visited. Drought and related issues really became top priority for most of the state at the end of last year, so the majority of my time was involved in assisting growers to obtain government assistance, as well as to determine how this will affect them into the future. This is one of the main reasons why trips to several regions were postponed, as growers were struggling with other priorities.

However, the following information relates to the issues and outcomes that result from the regional tours undertaken.

Vegetable Database

The Vegetable Database was initiated by the Vegetable Industry Development Service Northern Australia. The categories and format of the information have been developed in response to the industry needs and issues and feedback from growers. Including comments such as:

‘Just tell me what information is out there and where to get it, and I’ll go and get it if I want to’.

The response from growers and other interested members of the industry have been positive, any problems with using the database have been overcome with adjustments being made to the Database to make it as user friendly as possible.

The Database is accessed by visiting the QFVG home page (www.qfvg.org.au), and following the prompts, or by accessing the database directly, the website is - <http://www.qfvg.org.au/vegupdate/default.asp>.

Material is continually added to the database, as well as contacts, web links, and the ability to attach documents has made it an easy “one-stop-shop” for growers.

While speaking with growers and industry about the database, comments were also raised about the importance of maintaining information on the vegetable page on the website also. Comments/ issues relating to the database and to information available via the vegetable page on the website have included:

- The need for a page with all relevant web links for growers, so that if they need to search the entire Internet, they can find the most relevant in the one spot.
- Having newsletters available online, for those who don't need to receive on by mail (particularly QDPI staff, resellers etc)

Outcomes

- I have put together a page of weblinks, using headings that match with HAL R&D commodity groups, as well as R, D&E, trade & statistics, production, industry, media and environment.
- I have worked with the communications department at QFVG to have each Vegetable News uploaded onto the website after each edition

Vegetable home page

<http://www.qfvg.org.au/members/vegetables.html>

Industry Links

<http://www.qfvg.org.au/members/Vegetables/VegetableLinks.htm>

Vegetable News

<http://www.qfvg.org.au/members/Vegetables/Vegetable%20News.htm>

R&D issues evaluation

While meeting with growers, the 2003/2004 HAL R&D priorities were explained and discussed, with growers inputting ideas and comments. These comments will be compiled for the next milestone.

The Monto region (west of Bundaberg) in particular is a relatively new region for vegetable growing, and therefore the growers in this region have differing needs to other more established growers. As a result their issues were more related to general production issues. Issues raised in this region included:

- Pest and disease issues and information
- Market information & alternatives to the central markets
- Training
- Receiving communication.

Outcomes from these comments have included:

- Provision of contact details for alternative suppliers – both closer to the region, as well as alternative opportunities, eg Mrs Crockets.
- The issue of training both for growers to improve their knowledge as well as the issue of keeping skilled youth in rural areas. Monto is not alone in their issues with training, and this has also been highlighted through national needs and issues.
- Re-assessing the information that is sent using different media. It was surprising to find that growers in this region were happy to receive information via e-mail. This information has been incorporated into the grower database at the office.

Conclusion

- Training is becoming an issue for growers, whether it is due to requirements for SQF audits, or to improve their knowledge. As a result I have been involved with various funding bodies who provide assistance for primary producers to complete training. This will be followed up further in the future.
- With changes going on within the state association, this has caused misunderstandings for growers as to the role of the Vegetable IDO, and the future as well as funding of the position. This issue is being overcome through communication to growers via newsletter, as well as at meetings.
- As a result of the changes with QFVG, the Queensland Vegetable IDO will be using the HAIDB in future. This has not been the case in the past, so work to update and maintain the new database has also commenced, and will be finished by June.

Milestone 8

R & D Needs Identification and reporting

The objectives of the milestone are as follows:

- Continual Assessment and re-evaluation of R&D issues. Industry issues are also collected, and passed on the relevant organisations (HAL, AusVeg) where necessary / relevant, even where they are not R&D related. This will also include a review of the project over the last 4 years, so as to plan for future work. This can be used to encourage and determine grower enthusiasm and potential input into the project.

Vegetable Industry Planning workshops

Over the last two months, industry workshops have been held in major growing regions around Queensland. These meetings were held in the Lockyer Valley, Granite Belt, Darling Downs, Childers, Bundaberg, Ayr and Bowen.

At each meeting growers and industry stakeholders were invited, including DPI researchers and consultants, Wesfarmers Landmark and Primac Elders representatives, as well as local Landcare and Farmbis coordinators in some regions.

The aims of the meetings were to:

6. *Update on the current Vegetable Industry Development Service project, including a summary of work to date*
7. *Set priorities for the industry at a regional, commodity and industry level, to be incorporated into IDO roles and responsibilities, work to be undertaken at state association levels as well as important national R&D needs and issues.*
8. *Discuss and plan any future projects as part of the proposed Northern Australia Vegetable IDO project currently in the proposal process*
9. *Involve growers in taking an active role in their industry either via the IDO, or being more active in priority setting for R&D work.*
10. *Catch up with growers around the state.*

Workshop method

Growers were invited to give comment on issues that they felt were important to the sustainability and development of the vegetable industry. These comments and issues were similar throughout the various growing regions, regardless of size of business, geographical distance to markets, and variety of commodity grown.

To encourage growers' comments, the priorities that have been determined at a national level were also provided for comment and feedback. This included the six R&D group priorities, as outlined in the National Vegetable Industry Strategic Plan, as well as the 2003-2004 vegetable priorities found on the Horticulture Australia website.

In this way we were able to discuss the relevance of the priorities being put forward by R&D delegates, those that needed highlighting, as well as priorities/ issues that had not been considered. Importantly it also gave the growers a chance to understand the considerations that are being taken on by delegates at a national level.

Workshop results

As previously stated many comments around the various regions struck a similar chord amongst vegetable growers and industry players. The full list of comments from the various regions are attached as an appendix, however below are those issues that have been highlighted as the most noted. General comments have been included underneath to explain the main issues:

Sustainability of industry

- Successional planning for businesses as well as issues such as superannuation
- Environmental conscience needs to increase, but also be rewarded
- Allow new growers into the industry to have the information that they need, so that they have a full understanding, and do not jeopardise the work that we have done in developing to the present standard

Consumer research/ understanding

- Consumers to have better understanding of what it costs to grow
- Issue of country of origin, so that consumers are more aware of buying Australian grown produce and helping to support our rural industries
- Promotion through schools on the importance of vegetables as well as the role that the vegetable industry plays on our communities

Transparency of supply chain

- Market domination of the chains – too much clout
- Growers need to get closer to the market, to the consumers and work at influencing their decisions when buying our vegetables – take ownership of the product

Chemical Registrations

- Need to take more consideration of greenhouse and minor crops – these smaller crops seem to be missing out
- Registrations need to be looked at regionally to make decisions on suitability
- Chemicals are being taken off our markets in Australia, but still being used in New Zealand and other countries

Labour

- Finding skilled labour that is willing to stay. Training itinerant workers is time consuming and repetitive
- Training available to businesses – managers and staff, including funding available and courses on offer

Cost of production

- General costs increasing while prices are not
- Costs of compliance and implementation of accreditation increasing with no financial gain in prices received

National Priorities

Below are the group priorities as well as the national priorities for 2003-2004. Growers generally agreed with these priorities, those shown with an * are the issues that people felt strongly about. The issues **in bold**, are those priorities that growers felt had not been considered, or needed to be a separate issue.

R&D Groups

Brassica <ul style="list-style-type: none"> ▪ Diamond Back Moth ▪ Clubroot ▪ IPM ▪ Trueness to seed * ▪ White Blister <ul style="list-style-type: none"> ▪ Labour costs ▪ Health Benefits 	Export <ul style="list-style-type: none"> ▪ Supply chain efficiencies * ▪ Supply chain vertical alliances * ▪ Product development (value added products) ▪ Understanding markets ▪ Freight
Leafy <ul style="list-style-type: none"> ▪ Grower coordination and communication ▪ Control of pests and diseases ▪ Product development – new varieties, understanding consumer needs, value adding ▪ Marketing ▪ Standardised QA and packaging 	Processing <ul style="list-style-type: none"> ▪ Development of fresh cuts and convenience meal solutions ▪ Develop export markets ▪ Import replacement
Root <ul style="list-style-type: none"> ▪ Sustainability land and water resources ▪ Export market opportunities ▪ Post harvest practices ▪ Carrot virus (CVY) 	Other <ul style="list-style-type: none"> ▪ Chemical registration ▪ Pest and disease control ▪ Water management and use ▪ Promotion to increase consumption

2003-2004 National R&D priorities

- Product development
- Consumer research
- Alternative consumer channels

- Post harvest product management
- **Post harvest product handling**
- Water resource management
- Environmental management systems
- Grower groups *
- Labour *
- Communication

Conclusion

These issues and priorities are now being used to plan work within the Vegetable Industry Development Service project. These priorities will also be discussed with the state R&D committee when preparing for future national priority setting meetings.

Discussions amongst staff at QFVG, especially the agri-policy unit, are being organised. This is to determine how several of these issues will be faced and dealt with in the future, so that growers are able to see that their comments during workshops such as these are able to make a difference and indeed develop their vegetable industry.

In this way we are able to encourage vegetable growers to take an active role, and it will determine their responsibility to be involved in future works. It also re-assures them that work at regional, state and national levels has the potential to benefit their businesses, and highlights the importance of the structures that we have in place.

These workshops have been a huge success. It has been a great chance for the Vegetable IDO to meet growers for the first time, while catching up with familiar faces, and involving people across the industry. The importance of these workshops on a regular basis is great – and ultimately what one of the major roles of the Vegetable IDO is all about.

Grower Workshop Comments

Darling Downs

- On farm vs retail prices
 - QFVG role – market watch – policing and public knowledge
 - People understanding what it costs to grow
 - Prices in chain stores (eg during drought prices increased, even though growers didn't receive an increase in profit)
 - Transparency in chain – lots of grey areas
 - Top price for lower quality
- Imported produce cheaper than Aussie produce but still sold at the same price
 - The imported produce is often older
 - Consumer knowledge/ understanding – support for Australian produce
 - Competition
- Queensland not as well represented at a national level for chemical registration – CPA & AUSVEG
 - Need to target Qld for national registrations to go through
 - At the moment there seems to be a southern focus
 - QFVG needs to identify issues better – Janine
- Water management
 - overhead irrigation vs drip – getting information on changing these processes – WFP
 - big expense if you are not sure what to do and stop before you have the experience
 - WFP Case studies
 - No time for workshops and seminars
- Politicians saying we will bring you water to grow more, but we already have over production most of the year
 - Export is not always an area to follow – transport and time
 - Don't need more production – floods markets, especially salad crops in winter in the Lockyer Valley – Darling Downs doesn't grow at the same time
 - Chain stores demand continuity, standard quality, year round supply

Granite Belt

- Knowing what's available
 - Research results
 - Funding available
 - People and commodity specific information
 - Initiative to trial something – who to talk to
 - Programs, project etc
- Heliothis
 - Where does it go to
 - Project, information
 - It has been in the too hard basket for too long
- Chemical withholding periods / permits for smaller profit crops eg Chinese Cabbage

- Chemicals are being taken off our markets, but still used in NZ and other countries
- MUP (if larger crops eg Cotton) stop using we lose it as well
- Losing chemicals that aren't being replaced by anything
- Differentiation between commodities – can't register for all of them
- Minor crops missing out
- Cotton and grain have the volume sales for the chemical companies so they don't worry about horticulture so much
- Financial incentive for vegetable crops is not there
- Consistent access to chemicals
- Seed consistency/ quality
- Training issues for staff
- Decent produce should result in decent prices, then wouldn't begrudge paying the higher wages
 - Superannuation for overseas backpackers – why do we pay it? Give workers the options do they want to pay it? ATO ISSUE
 - Skilled labour who are willing to stay
 - Staff who are worth the money we pay
- Cost of production – costs increasing while prices decrease
- Follow up contact with produce
- Market domination of the chains – too much clout
- Not enough promotional work done – on anything
 - Education department – eg Amiens school teaching kids about horticulture
 - People understanding costs involved/ how the system works/ employment
 - School visits – country as well as city kids need to know
 - Promote vegetables in groups – eg winter time promote soups
 - Don't be too specific in promoting – doesn't have to be just one fruit or vegetable
- QA – how has it changed the end product?
 - More cost, more paper work, no financial gain
 - Market still takes lower quality produce if needed
 - If everyone had QA and used it properly you wouldn't mind
 - At the moment there is no implementation
 - Eg of trays – cold store
 - Refrigeration/ cool chain management
- Grower groups
 - Celery growers are a good example of it working
 - Won't work – human nature, different opinions
- 24 hours vs 5 days between sending and returning produce to agents
 - if they don't take the produce they need to have a quicker turn around time
- policing second hand cartons
 - Qld grower's cartons turning up after there haven't been any around – interstate and back
 - QFVG role

Lockyer Valley

- Water

- Chemical registration
- We are focussing too much on soft chemicals and not on hard ones. Some of the pest and disease problems that we are having are as a result of losing these out of our weaponry
 - Big problems mean that you need big/ hard chemicals
 - Softly, softly approach is fine if you have easy problems to overcome
 - Cost of soft chemicals is too great
- Pressure from market place for year round top quality produce
- Understanding chemical information – it is becoming more specific and more technical and understanding it all is becoming harder
- Hard to know where to go or who to talk to for specific issues
- Silverleaf Whitefly
 - Don't forget about it, it is out there so we need to maintain awareness, increase our understanding and knowledge on the pest (such as is it able to transmit viruses)
 - Need to find cheaper means of control
 - It would help if endosulfan was available, but we can't use it, therefore we are losing means of control
- Costing commodities – benchmarking for the community/ consumers so that they are aware of the costs of growing their vegetables
 - Costs on farm are always increasing, we are told to become more efficient etc, but we need to make money so that we can manage our land properly, or with an environmental focus
- It is now impossible to come into the vegetable industry and start from scratch – due to price of land, cost to set up etc. This brings an issue of food security and sustainability
- Ability to model the industry for people coming into the industry so that people are aware of the viability of the industry – so that those who can grow a good product, can afford to do so
- Sustainability of the industry and keeping people in the industry who are;
 - Environmentally conscious – “*clean and green*”
 - We don't want people powering people out of the industry
- We need to get over the cost of production
- To do this we need to work out what it is costing us to produce. This has to consider everything including;
 - Physical – labour, water, etc
 - Investment – land
 - Social – retirement, superannuation, holidays
- TRAINING ISSUE
- Crop Masters modelling
- Season after season we are getting bad prices for good produce – unless there is an environmental disaster (flood, fire, and drought) somewhere in Australia. This suggests over production and what do we do about it?
- Difference between price grower receives and price that the produce is then sold for is getting greater
- Government is socially responsible for environmental issues. We need government legislation to help the problem (water, salinity etc). What will it cost the system to get us (growers) where we want to, and need to be environmentally?
- The smarter we get at growing, the less we receive as payment

- We need to get closer to our market, to the consumers and work at influencing their decisions and get the prices that you need for the produce you have grown
- We need the ability to model the industry for people coming into it
 - Determine the viability
- The tag of “*price takers not price makers*” has to change
- Retailers hold all the cards at the moment. We need to know what is going on in that sector – are they ripping us off, is there mark ups, profiteering etc?
 - What is there efficiency if they have to mark up prices so much?
 - Need to look at other outlets for our produce
 - They have 80% control of produce at the moment, but are this the future?
 - While consumers continue to buy at supermarkets it will be consumer driven
- Predicting future consumer trends, reacting in the market place
- Just because we produce, doesn’t mean that consumers will buy – they need to be able to afford it
- Household preparation knowledge is decreasing
- Greater focus at a supermarket level
- Recognition at a retail level – get involved, take ownership of your product, be proactive not reactive to the market place
- We need to make sure that those in the industry are doing the right thing, using the right chemicals have the industry’s best interest at heart – we are not all striving for the clean, green image
- We need to look at variety of produce vs what we can afford to grow, and what consumers can afford to pay. Eg if it is costing us more to grow our shallots than what they are selling for, do we just live without shallots and stop growing them?
- We have all year round season at a national level due to climatic conditions and production areas (this can work against us). This leads to higher consumer expectation for top quality all year.
- The seedless watermelon industry is regulated and marketed through one channel
- Perfection is always putting out new lines of produce and varieties
- R&D tax concessions – who knows about it? What percentages of growers are taking advantage of it?
- Labour
- recruitment
- attracting staff into the industry
- skilled staff
- training specific – competencies of staff
- idea of a template of what you should know that can be fine-tuned for individual businesses
- look at competency based, WH&S, legal and legislative requirements
- Harvest time – most of the crop’s money is tied up at this end. We need to have staff at this stage who aren’t losing us money, affecting the produce, because they don’t know what they are doing, or because they are too slow
- award should be increase for the work that the staff are doing – we need to pay them a good wage so that we have decent staff who are willing to stay around and do a good job
- INCENTIVE
- Price point has to be reflective of production cost

- Industry is geared around the consumer and what they want, not around the commodity and what it needs
- Costs are rationalised through the systems – everyone is deflecting the costs back to the growers (retailers, transport etc) Growers are footing the bills, and still not getting that reflected in price.
- Good fruit and vegetables will sell – people want quality
- Supermarkets don't want to lose their fruit and vegetables lines because it is their most profitable
- Would be interesting to track profits over the years looking at supermarket prices for various commodities
- Different prices are taken from growers for their produce – some are realistic, some are under cost of production.
- An individual grower can't go in and demand higher prices, because the retailers know that there is another grower standing behind them who are willing/ forced to take less.
- This sort of activity is not sustainable for the growers or the retailers
- Monitoring tools – have the ability to factor in the cost of different crops at different times of the year
- We need more transparency at retailer end. They need to work on improving their credibility with growers
- Transparency in the supply chain is a big problem
- Training idea could be helping growers to access supply chain players
- Where are the gaps in future strategic planning for the industry – a QFVG role as well as national?

Childers

- Input costs vs output costs
- Lots of money going out of the business, not much coming in
- Eg SQF, QA audits
- Costs of implementation / compliance costs
- NO FINANCIAL REWARD
- Smaller growers struggle with the crops
- Training for supermarkets
- Coles, Woolies staff
- What happens to our produce once it has left our farm?
- Post harvest product handling
- Chemical accreditation
- Get industry auditors to do the work
- If you have a good reputation, then you shouldn't have to pay money each year, maybe one in three, or one in five year check
- Researchers need to do updates on work
- Eg tomato plant breeding research being done in Bundaberg
- Less R and more D was a good summary

Bundaberg

- Wages
- Income tax – need to fight the pay rises

- General costs increasing
- Both small and large growers are affected by any changes
- NRA – registrations should be looked at regionally to make decisions on suitability. Eg in the Bundaberg region there are no cattle and no aerial spraying so Endosulfan shouldn't be an issue.
- Transport costs – prices increase and the costs fall to the grower
- Controlling body on shopkeepers
- People think that due to the drought prices of vegetables increased, but the grower who was suffering did not receive this. Hard to believe that people want to profiteer off the drought
- There are mark ups along the way – market, agents, shops, etc so we need a watch dog on the markets
- Higher prices don't help anyway as they slow down volume flow
- There was apparently an example a couple of years ago with apples where they monitored the shops and tried to do this type of watchdog effect. There may also be overseas examples
- Supermarkets buy on kilograms, whereas markets buy on looks and sell of Kgs. There needs to be continuity in buying and selling produce
- There should be some sort of guidelines to follow

- Chemical registrations for greenhouse growers. They are all in the same group which makes rotation hard
- Information available on IPM in greenhouses
- Chemical registrations for minor crop growers
- What is the definition of a minor crop these days?
- Industries such as greenhouses, hydroponics, snow peas etc are no longer small crops when you look at the money they bring into the industry, people they employ, etc.
- Better marking in supermarkets so that consumers can identify country of origin. In this way the consumer then has the choice between buying Australian grown or not.

Ayr

- Labour – locals and backpackers not enough. Training itinerant workforce is time consuming and repetitive, with frequent loss of staff. {similar programs with “work for the dole” needed}
- Increasing pay levels for workers to give incentives to work harder based on experience.
- Better prices for commodity would enable growers to hire a better workforce.
- Growers working together would increase their voice politically on issues such as labour – grower group with a “price maker” not “price taker” attitude.
- Transport union in with the growers would also increase political voice.
- Supermarkets are an uneconomical way to market vegetables. They have the power and so don't have to worry about their inefficiency.
- Individuals don't work as a group, which limits growers' ability to get a decent price for their produce.
- QA doesn't guarantee a grower a better price!

- Post harvest management of product is important to highlight to supermarket chains but should not be an issue for R&D \$ to be spent on.
- Supermarket expectations make greater demands on growers eg packaging and presentation, but there is no extra value to growers.
- Market research – what the consumer is thinking and how they are going to perform what they are going to purchase. Knowledge on consumer numbers at local markets vs supermarkets needed.
- Freight costs limit sending to southern markets, so local markets are a viable alternative.
- There are no Nth Qld reps for commodities any more, thus there are few R&D projects being funded – most of it seems to go to researchers in southern states.
- Water prices for licences at \$50 each. Charged to put down bores on their own properties.
- Capsicums seem to be the only major crop group grown in this area that are getting R&D projects funded.
- Why can't levies taken from a specific district be allocated back to that region? Certain percentage (10%?) could go towards national issues but the rest should come back into the district of origin.

