

# **Subtropical Banana Industry Market Development Implementation for 2012/13**

Geraldine O'Flynn

Project Number: BA12000

## **BA12000**

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# Final Report



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Project Title: SUBTROPICAL BANANA  
INDUSTRY MARKET DEVELOPMENT  
IMPLEMENTATION 2012/13

Prepared for Subtropical Banana Industry and  
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The purpose of the following report is to provide detail on methodology, output and outcomes of Project BA12000 Subtropical Banana Industry Market Development Implementation 2012/13.

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The report is dated 22 July 2013

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## Media Summary

Following on from the development of a 3-year strategic plan for market development for the Subtropical Banana Industry in 2011, two specific projects aimed to implement initiatives identified in the plan. The first project was the development of an online supply chain directory specifically to provide a central point for development of supply and demand alliances. The Directory is now available from the Australian Banana Grower's Council site links [www.abgc.org.au/banana-industry/links](http://www.abgc.org.au/banana-industry/links)

The second project was to address capacity building around grower needs in market development. To this end workshops were conducted across the region, designed to engage growers and wholesalers with other industry affiliates, to determine priorities and actionable plans for future market development.

A small but enthusiastic band of growers and wholesalers emerged, and supply chain networks were identified and developed. These included links to retailer groups, agri-tourism potential and areas of value adding potential.

As a result of the first round of workshops two objectives for the industry were identified: 1. a collaborative grower group and 2. specific strategic marketing for Subtropical Bananas.

The second round of workshops then addressed these two objectives and delivered information to the Subtropical Banana Industry on developing the capacity to move to the next stage with these objectives. This included utilising local/regional organisations such as Regional Development Australia for collaborative projects; as well as utilising regional identity, or provenance, for marketing leverage.

## INTRODUCTION:

This report for Project BA12000 describes the implementation of market development for the Subtropical Banana industry. For this project two workshops were developed to bring together participants in the local short supply chain, in order to facilitate capacity building across individual and group needs.

This implementation is in line with the *3-year Strategic Plan for Market Development for Subtropical Bananas* (Strategic Plan), a document which was developed in conjunction with grower and industry representatives. Subtropical banana production accounts for approximately five per cent of Australia's overall banana production. The Subtropical Banana identity is open to all banana producers within the geographical location of the subtropical region of Australia.

The objectives for the Strategic Plan are as follows: 1. Differentiate ST bananas from tropical bananas; 2. Increase local demand in the specific regions of local production; 3. Engage proactively with wholesale and retail partners to build lasting, sustainable and mutually beneficial relationships; 4. Through increased consumer demand, achieve a higher price for ST bananas; 5. Through achieving Objectives 1-4, ensure a sustainable banana industry in the sub-tropics.

In addressing these objectives, and most specifically objective 3, there is a recognised diversity in distribution channels: Grower supplies to wholesaler for local distribution; Grower supplies to wholesaler via central markets; Grower acts as wholesaler for their own as well as other growers fruit (local and elsewhere); Grower supplies direct to local retailer; Grower sells direct to consumer via Farmer's Market both local and outside region.

In recognition of this diversity, an earlier project, BA12003, created an online supply chain directory, hosted on the Australian Banana Growers Council website (<http://abgc.org.au/projects-resources/industry-projects/subtropical-directory/>). The Directory carries details of growers, as well as wholesalers, who chose to list their business and contact details.

As a follow on to the Directory, and to further facilitate grower participation in the supply chain, the workshops were based on the principles outlined in the *Capacity Building Resource Manual* (Mackenzie, 2007). The method used, and reporting style, therefore sits within the capacity building elements as identified by Mackenzie in the manual where engagement "...involves the bringing together of all relevant communities of practice around a common goal but with an opportunity to pursue their own interests" (Mackenzie 2007 p 6), and to this end the workshops were designed for each participant to take from them what may suit their needs.

There had been extremely bad weather in early 2013, with ex Tropical Cyclone Oswald wreaking havoc across the eastern subtropical region, and possibly as a consequence of this grower numbers were down for the first workshop. Subsequently, by the time of the second workshop Subtropical Bananas were in very short supply, and grower interest in the project had waned. However, what eventuated was a small but enthusiastic number of participants, interested in developing the Subtropical Banana identity, and their own capacity for furthering their market development.

## METHOD AND MATERIALS:

Project BA12000 has sought to build capacity for subtropical banana producers, most specifically in the area of market development, in line with the key elements noted in the *Capacity Building Resource Manual* (Mackenzie 2007). Underpinning the supply chain development proposed, is the *3-year Strategic Plan for Market Development for Subtropical Bananas* (O'Flynn, 2011), this project sought to use workshops to engage with growers in the region, as well as key stakeholders in the supply chain, and other industry affiliates.

This chapter uses the capacity building elements as identified by Mackenzie to describe the process:

- outcomes sought
- engagement
- design
- delivery
- evaluation

Further to this the project aimed to meet the four central principles of design as described in the *Capacity Building Resource Manual* (ibid. p 28):

1. The outcomes of effective capacity building are improvements in all stocks of capital, as defined by stakeholders. As well there needs to be consistency between the outcomes and how a project is designed and implemented in achieving the outcomes
2. Capacity building projects try to include all of the members of the community of practice to which the project relates. The implications are that this will avoid those who are potentially important to have involved being left out of the process
3. Effective capacity building creates a common agenda and a willingness to collaborate among the members of the relevant communities of practice
4. Political and institutional commitment to the capacity building project's goals is a key to achieving outcomes

This was a six-month project, which commenced in January 2013 and ended July 2013. Due to the vast geographical distances two workshops were convened, but delivered in both north and south of the region:

### Workshop A

North: 14 February at Murwillumbah NSW

South: 16 February at Coffs Harbour NSW

### Workshop B

North: 7 May at Murwillumbah NSW

South: 22 June at Coffs Harbour NSW



## Elements of Capacity Building:

**Outcomes sought** as developed in 3 Year Strategic Plan for Market Development for Subtropical Bananas:

- smooth communications management across short supply chains
- easily recognisable subtropical bananas
- effective engagement in regional distribution networks
- build growers knowledge and understanding around maintaining quality and standards
- prepare for further market penetration into major supply chain networks
- build grower knowledge base
- build participation of growers in whole of industry cooperation
- better fruit handling and transport outcomes

## Engagement:

Presentations were made to the November BGA meetings in both Coffs Harbour and Tweed/Brunswick outlining the purpose and scope of the proposed Workshops. Growers at both meetings expressed their support for the Workshops, and the content to be covered. Content for the Workshops: 1. Presentation and Packaging; 2. Wholesaler and Retailer Forum; 3. Market Development (appendix 1).

A Project Reference Group (PRG) was formed for Project BA12000. The members of the PRG represented a cross section of growers/wholesalers and industry affiliate to inform and guide the implementation of the project. A document outlining the roles and responsibilities for the PRG was developed (appendix 2). As a result of this, membership to the PRG was clearly defined. However, subsequent attempts to involve representatives from the nominated areas failed to fill all positions. Therefore, the PRG consisted of: two representatives from the Coffs Harbour and District Banana Growers Association; one combined representation from Nambucca Banana Growers Association/Australian Banana Growers Council; one Tweed/Brunswick Banana Growers Association; one southern wholesaler representative; one industry affiliate; Industry Development Officer.

There were three teleconferences with the PRG and one face-to-face meeting: teleconference 1 in February, prior to Workshop A; A face-to-face meeting was held with PRG in March, as a follow up to Workshop A, for an analysis of the workshop, and to discuss next steps for Project BA12000. Teleconference 2 and 3 were one each in April and May for further collaboration with the PRG on design and delivery of Workshop B, as well as other activities underway across the region. The PRG also discussed the participants to be invited to Workshop B for Coffs Harbour, further market development initiatives and participation in the *Australian Banana Congress 2013*.

## Design

Workshops A and B:

Meeting the four central principles of design as described above:

1. The workshops were designed to assist growers in the eastern subtropical region to develop their market presence, most specifically into their own immediate areas.

In doing this the project aim was to achieve outcomes: to build better communications; develop ties between stakeholders; facilitate discussion; improve knowledge about supply chain; improve grower knowledge and understanding around maintaining quality and standards; and investigate solutions for the ongoing viability of Subtropical Banana producers

2. Workshop A was designed to involve supply chain members, and affiliated industry members, in order to introduce and share opinions, interests and different points of view.

To this end, invitations were sent to all banana growers in the regions (north and south) as identified from existing database, as well as each of the wholesalers located both within the region, as well as representation from Australian Banana Wholesalers. Also a number of retail buyers for the immediate region and representatives from the major retailers were also invited.

Workshop B, being a much shorter event, focused more specifically on growers and immediate local networking opportunities. This workshop was designed to follow up on action plans developed in Workshop A, and particularly delivered specific engagement on group collaboration and immediate market development networks.

3. Workshop A presented a broad range of ideas and concepts for discussion, followed by narrowing down to identified key actions. As such, a number of areas were covered, which addressed a range of issues: situational overview, opportunities for packaging differentiating subtropical bananas, and local distribution opportunities.

The second half of the day for Workshop A then engaged participants in determining an action plan.

Brainstorming in smaller groups

Prioritise opportunities (using importance versus urgency matrix)

Re-prioritise (using ease versus cost matrix)

Select two top priorities

Develop solutions for each two

Re-convene to main group and develop Action Plans for top two identified priorities (appendix 3) which emerged as:

1. Grower collaboration
2. Specific marketing

After Workshop A the PRG carried out a Strengths, Weaknesses, Opportunity and Threats (SWOT) Analysis on the action plans. It was determined that Workshop B would focus on growers/suppliers showing a clear intention to engage, and that PRG members would work towards getting those growers involved in Workshop B (SWOT appendix 4). During the SWOT analysis Grower collaboration was deemed of higher importance than specific marketing, as marketing would have no value without grower collaboration. Planning was then underway for Workshop B, to be held in conjunction with BGA meetings in Murwillumbah and Coffs Harbour in May 2013. Project Reference Group members were to actively recruit interested parties to attend. Workshop B then developed the identified key actions.

4. Further, industry affiliates including local council representatives, educational institutions, parliamentary representatives and peak industry organisations were invited to attend Workshop A. Representatives from Australian Banana Wholesalers were also invited but were unable to attend. The role of Regional Development Australia for Northern Rivers, Mid North Coast and Moreton Bay was also recognised and further involvement with these organisations was recognised for future engagement.

#### **Delivery:**

The delivery model chosen, to facilitate an active empowerment through group collaboration, was based on the implementation of market development highlighted by the Strategic Plan; further to the technology in place in the form of an online supply chain directory; and information access provided by communications/information projects already underway from the broader banana industry activities.

#### **Workshop A:**

Each grower was individually identified from an existing database and fliers were posted directly to them for Workshop A and B (appendix 5), and the invitation included the workshop agenda (appendix 6).

As a daylong workshop the morning was set aside for presentations, with the afternoon for brainstorming and to develop action plans.

The Tweed/Brunswick Workshop attracted 11 local growers (including 1 grower from Bundaberg), and one wholesaler, as well as Tweed Shire Council Project Officer for Sustainable Agriculture, and a researcher from Southern Cross University researching lifestyle farming, and communications officer for ABGC for half day. Also present was the National Party Federal Parliament candidate for Richmond, Mathew Fraser. The Coffs Harbour Workshop was attended by 11 growers and one wholesaler.

Presenters for the Tweed/Brunswick Workshop were: Peter Thompson from *Packaging Traders Pty Ltd*, highlighting the use of packaging in product differentiation and innovations in packaging technology; Peter McGregor from *LabelPress*, manufacturer of fruit labelling particularly stickers, presenting on various forms of stickering for product differentiation;

Kirstie McClean of *McClean Marketing* speaking on consumer behaviour trends; and Ray Fien of *Madura Tea* speaking of the experience of *Madura Tea* in breaking into a large market as a small player.

Presenters for the Coffs Harbour Workshop were as above excluding Ray Fien, and including Geert Staring, CEO of *Breeder Trust*, a company protecting European breeder rights and patents. Geert presented on the role of certification/accreditation in establishing and maintaining quality standards, particularly for consumer information, and as a tool in product differentiation.

Both Workshops also used the Western Australian growers group *Sweeter Banana Co-Operative* as a case study of successful collaboration and marketing for a niche market product.

The Workshops were facilitated by Tristan Kitchener of *AXS Partners*, who has extensive knowledge of the horticultural industry, and in particular the Subtropical Banana Industry.

The afternoon session of Workshop A focused on delivering Action Plans derived from key issues identified by the Workshop participants as described above. Two dominant objectives were identified in both Tweed/Brunswick and Coffs Harbour, these being: 1. Grower Collaboration: a grower collective to represent growers committed to the project; and 2. Specific Marketing: development of a specific marketing strategy for future planning. These action plans were then combined and used for design and delivery for Workshop B

### **Workshop B:**

According to previous database mailing list invitations were sent by mail to both northern and southern regions (appendix 7) two weeks prior to each meeting. Workshop B: The Tweed/Brunswick Workshop was attended by 5 growers. The Coffs Harbour Workshop was attended by 6 growers and 2 wholesalers.

Workshop B for the northern region was held in conjunction with the Tweed/Brunswick BGA meeting, and for the southern region the workshop was held over until after the 2013 Banana Industry Congress, initial discussion was around holding the southern meeting at the premises of a local wholesaler, with particular emphasis on the wholesaler's future market development. However, the workshop was held at *The Big Banana*, Coffs Harbour on 22 June as this facilitated a broader engagement with the region's agritourism industry.

1. Grower Collaboration: information was therefore provided to both workshops on sound policy to underpin such collaboration. Information was presented to both workshops on examples of effective collaboration, particularly citing the *Australian Made Australian Grown Code of Practice* (Australian Made Campaign 2011) as an example of best practice for determining quality and commitment requirements.

Further to this, both workshops were also informed of organisations undertaking broader collaboration. For the northern group a presentation was made by *Northern Rivers Food* (a

food producers group which developed out of RDA Northern Rivers) committee members Pam Brook and Ray Fien, on the benefits of local networking opportunities, and market development opportunities associated with the organisation.

A representative of Regional Development Australia Mid North Coast was invited to attend the Coffs Harbour workshop, or provide information, but did not respond.

2. Specific Marketing: a presentation on samples of packaging options, and current pre-packaged 'Grab and Go' bananas being stocked in stores around Melbourne and in some instances packaged on site by local retailers. There was some discussion around the Subtropical Banana materials developed at the time of the writing of the Strategic Plan.

Kirstie McClean of *McClean Marketing* also presented to Workshop B for Coffs Harbour, as follow up to Workshop A, and provided further information on market development in conjunction with agri-tourism and the value of developing a regional identity.

Holding the southern workshop at *The Big Banana* afforded the opportunity to have the General Manager present to the group. His presentation focused on the current work being undertaken to refurbish the tourist attraction, and his very keen enthusiasm for engaging more actively with local banana growers.

Finally, a Coffs Harbour wholesaler presented to the workshop on an option they are developing to further value add, with branding and packaging options, for a small selection of bananas. They are establishing a two-year plan, further details of which are to be announced in the near future.

### Evaluation:

The evaluation strategy proposed for Project BA12000 was as follows:

Identified Groups for evaluation and feedback: Project Reference Group survey and comments and Workshop Surveys and comments:

Project Reference Group response: survey and feedback from PRG participants on projected and actual outcomes

Table 1: Evaluation of Project BA12000 from Project Reference Group

Evaluation of Project BA12000 from Project Reference Group					
January – June 2013 Implementation of 3 Year Strategic Plan for Market Development for Subtropical Bananas					
Objective	Strategy	Tactics	Implementation	Priority: 1 -4 (1 being highest)	Evaluation 1 – 5 (5 achieved /1 not achieved)
Increase local demand in the specific regions of production	Improve industry market knowledge, leading to improved uptake of ST Banana materials by growers	Workshops	IDO, growers	1	2/2/3/3/4/1
	Representation at local shows and markets to disseminate project information to growers	Local Agricultural Shows have proven a good point of contact with growers and short supply chain components	IDO, grower representation	2	4/5/4/5/4/5
	Build on social and economic sustainability for regions	Undertake market research with respect to identifying partners in the supply chain networks who promote locally grown produce, including agritourism; Following on from BA12003 in building network connections	IDO	3	3/2/4/3/1/4
	Food supply registers which connect growers with the rest of supply chain	Identify more regional outlets for inclusion on Directory from BA12003 and encourage growers and wholesalers to list	IDO and regional initiatives Web based Directory	1	2/3/4/4/4/3
Engage proactively with wholesale and retail partners	Communicate regularly with Australian Banana Wholesalers/wholesaler networks on fruit quality and supply	Special consideration for times of low production or poor fruit appearance (winter fruit); Disseminate information about fruit quality and supply to build capacity of the industry to produce consistent, quality fruit	IDO using workshops to build communication	3	2/3/4/2/2/2
	Develop efficiencies in delivery and handling, particularly smaller size deliveries in regional locations	Utilise data bases (Directory) of grower/wholesaler/retailer information to connect and create distribution efficiencies	IDO, Growers and wholesalers	1	2/2/3/3/2/3
	Utilise District Associations/regional groups to host opportunities to engage with supply chain networks	Intensive Workshops. Two workshops: Major one Feb 2013, minor one May; to define product and determine depth of supply	IDO, District Associations and regional groups, ICO	1	3/4/5/5/3/5
	Provide further information on produce handling, display and information to the consumer via retailer/wholesaler	Training/workshops; specific session in Feb workshop on handling and labelling; Demonstrations and discussion in conjunction with those already using specialised labelling and packaging	IDO In conjunction with training providers such as TAFE,	4	2/3/4/4/3/3
	Following on from BA12003, where communications with wholesalers was difficult, build ongoing contact between IDO and wholesalers for better feedback	Specific invitations to wholesalers, currently and potentially sourcing ST Bananas to attend at least one of the workshops on offer in this project; This is to encourage their input to the overall strategy	IDO to utilise opportunity to engage with wholesalers	4	3/4/4/3/2/2

## Evaluation of Project BA12000 from Project Reference Group continued:

## Comments from Project Reference Group:

*IDO did job well, difficult to get growers to engage, important to keep discussion going;*

*Industry shrinking, difficult to develop, large volumes are essential for sustainability, smaller producers without govt assistance will find it difficult to survive, economies of scale, labour inputs too high. needs family involvement, won't attract new growers;*

*There are 9 sections rated in this evaluation so if I thought every aspect of the project ran/achieved its desired tactics/implementation then my total rating should have added to 45. Mine came to 28 so you could say that it was a slightly above average result. However for this project I don't think this is a true evaluation. This project has succeeded in illustrating to participating growers and to those other growers in the local industry that the only way forward to prosper and sustain the banana industry in the subtropics is to be in a unified group supporting a local wholesaler that is willing to support the aims of this project. Will this happen on the Nambucca? -No. Will it happen in other local areas? There is a very good chance that it will happen in CH. Other areas? -I don't think so. So has the VC contribution by CHBGA been of benefit to them? -Yes most definitely;*

*Would have been good to see more growers' involvement, think this is a good start to building our industry back up.*

## Workshop Surveys:

Workshop A: Survey responses: 18

### 1. What did you like best about the workshop?

- hope – identification of channels and concepts, sharing ideas
- getting growers together, discussing issues and coming up with solutions, information and feedback
- very informative and felt that a goal was almost achieved – some progress made
- quality of key speakers/facilitators/presentations and use of different formats (videos)
- group consensus achieved
- very motivating
- networking opportunity
- good structure
- hearing differences of opinion

### 2. What did you like least about the workshop?

- limited grower and association participation /attendance
- lengthy
- needs better time for hosting
- poor attendance
- first few hours too repetitive of previous information
- the beer didn't start early enough
- kept away from work too long
- could have been half day
- no firm outcome/plan
- difficulties getting consensus

### 3. Would you do a workshop again? Frequency? What is the ideal length for this type of workshop?

What would you have done differently to improve this workshop?

- make next meeting specific to the channels identified to advance opportunities, cross pollination of channels
- engage better with Banana Growers Associations
- ½ day, twice yearly, choose different day
- more people to participate
- bi-monthly
- include more breaks
- quarterly
- 9-3 pm, twice yearly, with less steps in proceedings
- more comment from wholesalers
- more time to set a firm plan
- better than expected, needed full day to cover everything, some presenters needed to be better informed about industry



Scale of 1 – 4 where 1 is strongly agreed and 4 is strongly disagreed:

1. Did the workshop meet your expectations?	1	2	3	4
18 survey responses	0	1	10	7

2. Would you recommend this workshop to a colleague?	1	2	3	4
18 survey responses	0	2	8	8

Which original desired outcomes were achieved from this workshop? (Number of participants in agreement)

Build relationships	10
Increase demand: identify initiatives for mutual benefit to grow this industry	11
A commitment to implement agreed initiatives	11
Improve communications across supply chain	9
Improve grower profitability/sustainability	7
Greater insight and understanding about the consumer	7
Resolve specific category issues (short term and long term)	10

Additional comments:

- *action outcomes quickly*
- *excellent workshop*
- *enjoyed free items*
- *chose day better for when growers have more time*
- *good to see educated, motivated group of people passionate about their product*

## Feedback from others at Workshop A

Hamish Brice Sustainable Agriculture Officer

Tweed Shire Council

*These busy farmers are prepared to act for their own industry.*

*As the man from the ethylene room and on seller said there was no lack of customers "Get the product to me and I will sell it".*

*This did not receive the rousing reception that it may have and I believe price of sale was more the issue.*

*Marketing will improve the price and grow this local industry.*

*Sub Tropical Bananas I felt should be the class of banana and the sales name could be regional like Northern Rivers or Tweed or Bundaberg etc separating into the geological areas which I believe all have a different taste. And pursuing the "Eat Local" market which is strongly promoted.*

Kirstie McClean of *McClean Marketing* who presented at both workshops, and also provided feedback on Workshop A (appendix 8).

## Workshop B:

No survey responses were received for Workshop B. The number of participants was very low, and at the completion of the two-hour workshop all attendees left quickly. Comments received in response to general question on workshop feedback:

- *good to have some direction*
- *have now made some worthwhile contacts*
- *good choice of venue*
- *need specific marketing program*
- *difficult to get growers to work collaboratively*
- *growers not interested in attending anything to do with industry based initiatives*
- *needs leadership from wholesalers*

## Further Evaluation:

Given the number of growers within the subtropical region, overall there was very poor participation from growers for both workshops. In the ensuing PRG meeting after Workshop A the question was put to the group 'Where were the growers?' Their response:

- *February is a difficult month*
- *Number of people that turned up is an indication of level of interest*
- *Growers knew about it – but don't see any benefit for them*
- *All day is too long*

- *Preceding weather conditions may have put growers off as they were still cleaning up*
- *Anecdotal feedback from talking to growers – they have distribution lines and are doing OK – they don't need anything else*
- *The subtropical group's charter is to differentiate our bananas – this involves marketing, infrastructure and money. Small farmers cannot facilitate this – it is up to wholesalers in the area who can work as leaders in supporting and developing differentiation for Subtropical Bananas.*

Workshop A was a full day event, and Workshop B was approximately 1.5 – 2 hours. The general comment on both occasions acknowledged the quality of the presenters/presentations and information provided. Information was considered relevant and thought provoking.

For Workshop A participants were generally happy with the format of the day.

The main concern for Workshop A was the length, with some feeling the day could have been shorter. Also, February being a particularly busy time for growers, some felt a date later in the year would have been better. However, Workshop B was held May/June and did not increase numbers of grower attendance.

## RESULTS:

Project BA12000 has been a relatively short project of six months duration, over a large geographical area, covering a range of distribution networks. Table 2 lists the outcomes as proposed in the initial project document, followed by results achieved during the project implementation:

Table 2: proposed outcomes and results

PROPOSED OUTCOMES and RESULTS	
outcome	results
· <b>smooth communications management across short supply chains:</b>	with the online Directory active growers were encouraged to utilise this new technology; Increased number of growers listing on Directory: two growers, two wholesalers
· <b>easily recognisable subtropical bananas:</b>	Subtropical Bananas have been featured on the home page of Northern Rivers Food (a locally based food network which was initially funded by Regional Development Australia); Ongoing involvement with NRF has provided an opportunity to engage across the supply chain in the local area of the NSW Northern Rivers; Raised profile at Banana Industry Congress, with a number of presenters using the Subtropical Banana identity; one further application to use Subtropical Banana identity
· <b>effective engagement in regional distribution networks:</b>	Negotiations underway between major local wholesaler (northern) and retail buyer for South East Queensland; major wholesaler (southern) in ongoing arrangement with major retail outlets, building relationship around 'locally grown'
· <b>build growers knowledge and understanding around maintaining quality and standards:</b>	Workshops presented on packaging options and using labelling to establish credentials, and convey message for consumer information
· <b>prepare for further market penetration into major supply chain networks</b>	Online Directory has provided access point for further supply chain connections, particularly with interest from Sydney fruiterers sourcing supply (via Northern Rivers Food); wholesalers and retailers aware of Subtropical bananas and differentiation message
· <b>build grower knowledge base</b>	workshops provided information on a range of topics around market development for growers who attended
· <b>build participation of growers in whole of industry cooperation:</b>	record number of growers from Coffs Harbour/Woolgoolga/Nambucca region attended Banana Industry Congress 2013; Coffs Harbour wholesaler included in Congress program
· <b>better fruit handling and transport outcomes</b>	Coffs Harbour wholesaler looking to develop packaging and transport for local distribution, with support of Subtropical Banana growers

## Further Market Development:

Banana Industry Congress 2013: PRG active in presenting a united presence at Congress, good coverage of the identity; recognised by the retailers and across the industry. As the workshop was held after the Banana Congress a report was presented by a grower who had attended, highlighting the Subtropical Banana materials used by presenters particularly on Day 1 of the Congress.

Regional Development Australia also held a community consultation meeting with regional agricultural producers to discuss community preparedness for the NBN Broadband roll out. The community consultation involved a number of producers including the sugar cane industry, dairy farmers, honey producers, hydroponic farmers and beef and livestock producers. The Subtropical Banana Industry Online Supply Chain Directory was an example used to demonstrate the uptake of new technology for market development.

Two researchers from Southern Cross University have requested assistance in finding contributors to their research:

Dr Hazel Ferguson, Postdoctoral Research Fellow, School of Arts and Social Sciences, Southern Cross University, whose area of research is changing land use in the Northern Rivers, has interviewed 2<sup>nd</sup> and 3<sup>rd</sup> generation banana growers, who have now changed from conventional to organic farming methods, and who also utilise local farmers markets for their distribution.

Marie-Chantale Pelletier, PhD candidate, School of Environment, Science and Engineering, Southern Cross University, whose area of research is energy required for food production and distribution in the region. The researcher has now contacted a short supply chain distributor who sources from local banana producers, and a grower in the Coffs Harbour area who is also involved in benchmarking research being undertaken by the banana industry.

Online Directory: As the Directory is not an independent web site, but part of the ABGC website, it is difficult to determine site statistics, but numbers of additional listings would indicate success or otherwise.

The Online Directory has provided an access point for further supply chain connections, particularly with interest from Sydney fruiterers sourcing supply (via Northern Rivers Food); wholesalers and retailers are becoming aware of Subtropical bananas and differentiation message; there are five further listings for the Directory

There was also one further application from a grower to use Subtropical Bananas identity for product development.

Event attendances: Grower participation and IDO involvement with local supply chain network events and activities: Coffs Harbour Agricultural Show and Macksville Agricultural Show were attended by growers from each region; IDO representation at Northern Rivers Food (Grower subcommittee member); IDO representation at *Sustain Food* (RDA Northern Rivers) event.

SLSA Coffs Harbour through CHBGA: January 2013 giveaways for Annual ANZAC Day Fun Run

SLSA Kirra through Tweed/Brunswick BGA sponsorship and giveaways to junior members during summer 2013 competition season

## DISCUSSION:

Subtropical Banana producers are identified as small-scale producers, on limited acreage, with high input costs. As such, they are hard-pressed to compete with larger producers working to economies of scale. The aim of this project was to provide an opportunity for the small-scale producers of the subtropical region to engage and collaborate in an attempt to develop stronger, resilient short supply chains. As a result of Workshop A two action plans were developed: 1. a collaborative grower's group; and 2. specific strategic marketing. Workshop B then provided further opportunity to build on these, and as such also provided information based on these.

During the development of the strategic plan for the Subtropical Banana industry, material was developed to assist growers in the subtropical region to differentiate their fruit. The Subtropical Banana sticker and point of sale materials were developed, and a limited amount of materials were distributed to growers expressing interest in using the materials. Anecdotal evidence would suggest there has been an overall rejection of these materials and in some instances has caused considerable consternation.

This project faced difficulties in overcoming a perception that engagement necessarily involved using these materials. These materials were offered as a tool for use in differentiating bananas produced in the subtropics.

However, as has been the case in winter 2013, Subtropical Bananas have been in short supply. The strategic plan was developed to stimulate and increase 'local' consumption, and by virtue of this raise demand. What has become evident in the subtropical areas, which would normally supply 'local' bananas into the short supply chain, there is a tendency to substitute Subtropical Bananas with far north Queensland fruit. From anecdotal evidence stickering fruit was therefore discouraged by some wholesalers and retailers.

Therefore, there is a continuing difficulty for subtropical growers to retain viability in the face of large-scale production. Further to this, any attempts to extend the Subtropical Banana identity into longer supply chains, such as central markets, is confounded by inconsistent supply and quality issues. A recurring comment on why growers did not attend the workshops was that there was no point attending until such times as growers get paid more for their produce. As has been recognised in the attributes of Subtropical Bananas, they are generally smaller than fruit produced in the tropics, but are characteristically more flavoursome. There remains a price discrepancy between fruit size. Smaller size fruit generally attracts a lower price at the central market's wholesale point.

In this project capacity building was particularly focused on a target audience of farmers and their immediate wholesaler connections. However, as noted by Menzies (2007 p 9) strategies for increasing participation were observed including: localising the delivery by providing workshops in both northern and southern areas; using local grower associations to support

delivery; presentations to grower's associations and PRG prior to workshops to establish content.

However, what had been elicited from anecdotal evidence in Project BA12003 (HAL, 2012) was that a number of producers in the subtropical region were satisfied with their established supply chain networks and saw no role for a collaborative approach to market development.

As part of the further collaboration with the short supply chain, there was an attempt at collecting information for a banana price correlation across the subtropical regions. In consultation with the PRG, and an independent academic, it was deemed that data collected from such a small cohort would be invalid. Any results could be challenged as inaccurate and lacking rigour.

Whilst wider industry support for the small area of production in the subtropics is crucial, another aspect of engagement which emerged from this project was local engagement with other small-scale producers sharing a regional identity. There are a number of growers already branding their bananas by using their geographical location: Byron Bay Bananas, Urallba Valley Bananas, Snake Gully Bananas.

As noted in the strategic plan for Subtropical Bananas, there are organisations in each of the areas of production associated with Regional Development Australia (RDA), as well as local councils which are all proactively supporting food networks in their respective areas. According to research on the role of RDAs '...(they) would be pivotal in ensuring local empowerment and decision-making by providing collaborative leadership' (Buultjens, Ambrosoli and Dollery, 2012 p 183). Active engagement with these networks are an opportunity for producers to more fully extend their reach into their areas, and beyond in some instances, where regions then promote their 'brand' or 'identity' into other areas such as major cities and across tourism.

As previously noted, evaluating capacity building projects can be difficult as outcomes can be intangible. The project has now opened discussion and engagement around grower collaboration, further networking opportunities, an online supply chain directory, any or all of which may develop into the future.



## RECOMMENDATIONS

In building on the discourse now established, and in keeping with further capacity building principles, it would be beneficial to bring both northern and southern groups together to share experiences and knowledge.

Participants, or at least key leadership figures, require training in group process and planning for any future projects which endeavour to engage successfully with such a large community of practice. There were no natural leaders emerging from the workshops, and these are needed to facilitate future development. Research from within the field of innovation and its adoption recommend '...individuals depend mainly on the communicated experience of others much like themselves who have already adopted a new idea. These subjective evaluations of an innovation flow mainly through interpersonal networks.' (Rogers, 2003 p 331).

Subtropical producers need the continued assistance and support of industry organisations such as the ABGC to facilitate ongoing communications and supply chain connections. The Directory is also located on the ABGC site, and provides a point from which further market development could emanate.

As the subtropical region is a small but integral part of the overall Australian banana industry, they require the ongoing support of the industry as a whole. Specific marketing for the region could assist in building consumer awareness, whilst also establishing a niche product to expand the range of bananas on offer to consumers.

## TRANSFER

Industry communications are via a newsletter and industry magazine. There have been some changes to the format for the newsletters, which were initially divided into Tropical and Subtropical Banana News. These are now combined into one bi-monthly newsletter.

i) Articles appeared in the relevant industry publications as produced by peak industry body:

Australian Banana Grower's Council

- *Subtropical Banana News*, September 2012 p 8
- *Australian Bananas*, Issue 37, Summer 2012/13 p 23
- *Australian Banana News*, February/March 2013 p 6
- *Australian Banana News*, May 2013 p 5
- *Australian Banana News*, July 2013 p 6

ii) Project's outline presentation to:

Tweed/Brunswick Banana Growers Association and Coffs Harbour and District Association meetings November 2012 (see PowerPoint presentation appendix 1)

iii) A specific flyer was produced for distribution to growers and industry affiliates. Approximately 300 flyers were posted direct to growers; while emails and hand delivered flyers were also distributed (see appendix 5).

iv) The Workshops were also given coverage on:

ABC North Coast NSW, Lismore host Kim Honan, 15/2/13 6.48 am

Radio 2LM News 6.30 am 14/2/13

Prime Television News (Coffs Harbour) on 15/2/13. <http://au.prime7.yahoo.com/n1/news/a/-/local/16156094/banana-growers-look-to-the-future-video/>

After Workshop A:

i) Press release to local media outlets made by Banana Industry Communications Officer for ABGC (appendix 9)

Rural media:

'NSW Banana growers look to improve product marketing' (Goodwin, 2013)

'NSWs plan to beat banana dramas' (Rural Weekly, 2013)

ii) Radio interview followed Workshop A

ABC North Coast NSW, Lismore host Kim Honan, 19/2/13 6.48 am

Final media release to local media outlets made by Banana Industry Communications Officer for ABGC (appendix 10)

## ACKNOWLEDGEMENTS

Initial funding for Project BA12000 *Subtropical Market Development Implementation 2012/13* was provided by the Coffs Harbour and District Banana Growers Association.

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The Project Leader would like to acknowledge the time and effort made by members of the Project Reference Group who served to inform, advise and support this project:

Stephen Spear  
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Paul Gibbins  
Robert Pierce  
Paul Shoker  
Trina McEwen

The Project Leader wishes to also acknowledge the assistance of Horticulture Australia Limited in their administering of this project.

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Rogers. E. M., (2003), *Diffusion of Innovations* (5<sup>th</sup> ed), Simon and Shuster, New York

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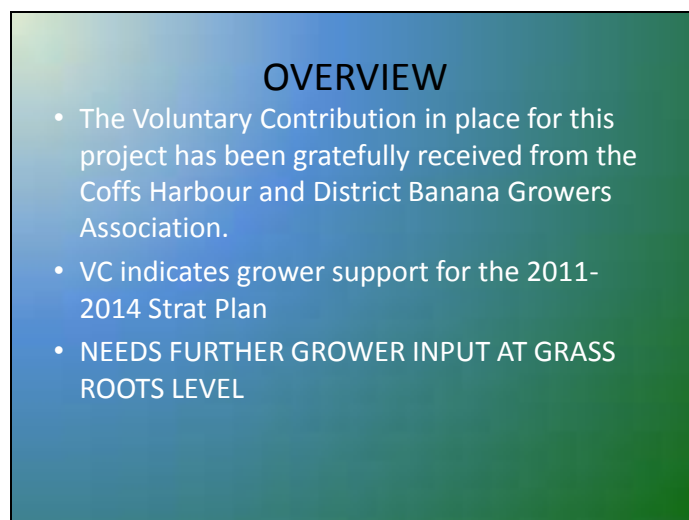
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Appendix 1: Power Point presentation to Tweed/Brunswick and Coffs Harbour and District Banana Growers Association August 2012

Slide 1



Slide 2



## Slide 3

**PLANNED FOR 1ST SIX MONTHS 2013.**  
**MARKET DEVELOPMENT**  
**X 2 WORKSHOPS (Feb and May)**

1<sup>st</sup> All day with three Sessions: 1. Presentation and packaging; 2. Wholesaler and Retailer Forum; 3. Market Development

2<sup>nd</sup> In conjunction with Association meeting: follow on from Market Development finalise input

## Slide 4

**Sess 1: PRESENTATION AND PACKAGING**



The slide displays six photographs of banana packaging. Top left: A bunch of bananas in a clear plastic bag with a yellow and blue label. Top center: A bunch of bananas in a clear plastic bag with a yellow and blue label. Top right: A bunch of bananas in a clear plastic bag with a yellow and blue label. Bottom left: A bunch of bananas in a clear plastic bag with a yellow and blue label. Bottom center: A bunch of bananas in a clear plastic bag with a yellow and blue label. Bottom right: A bunch of bananas in a clear plastic bag with a yellow and blue label.

Slide 5



Slide 6

**Sess 2: SUPPLY CHAIN FORUM**

USE NETWORK OPPORTUNITIES

Eg. Northern Rivers Food Lismore 2012

Opportunity to share experiences across the stakeholders: fruit handling, ripening, display, seasonal changes, build better relationships



## Slide 7

**Sess 3: MARKET DEVELOPMENT  
STRATEGY**

- This takes grass roots input. A facilitated meeting where ideas are listened to, with respect and courtesy.
- Not a forum to rubbish and complain.
- You need to be involved – if you're not involved you don't want it badly enough.

## Slide 8

**FOLLOW UP MEETING**

- 2<sup>ND</sup> MEETING IN LINE WITH ASSOCIATION MEETING TO REPORT BACK AND FINALISE IDEAS FOR PROJECT BA12000.
- LEADS INTO PROJECT FOR 2013/14 WHICH SPECIFICALLY WRITES AND IMPLEMENTS A MARKETING STRATEGY

Slide 9

### Industry Development

- Building on Online Supply Chain Directory
- Grower participation in ST Banana identity
- Co-ordinating Events Calendar
- Attending Food and Cultural Festivals
- Maintaining a presence at Regional Food Forums
- Ongoing communications with wholesalers on fruit quality and supply

Slide 10

### QUESTIONS AND COMMENTS



## Appendix 2: Project Reference Group document (1/3)

Subtropical Bananas  
Market Development Implementation  
Steering Committee/Project Advisory Group 2013



## INTRODUCTION

At the commencement of Project BA12000 Subtropical Banana Market Development Implementation for 2012/13 a guide has been compiled for the Steering Committee responsible for this project.

The Guide includes such areas as: purpose, role, responsibilities, membership, meetings, communications and reporting.

There is a responsibility on the part of Steering Group members to make time to address the key issues, enthusiastically and continuously champion the project, and to be alert to any threats to the project's success. This commitment to the project reflects the ownership members have taken for the success of final outcomes.

## PURPOSE

- Sets the tone for cooperation. Often project participants do not freely cooperate. In some cases agencies compete for the same funding resources. It is the purpose of the steering committee to rise above this competition and make sure agencies cooperate in completing the shared vision and goals.
- Gives "authority" to matrix organizations. In multi-agency projects (such as representing Associations) there are rarely direct lines of authority between cooperating entities. It is the role of the steering committee to ensure the means and mechanisms are in place to get things done.
- Represents stakeholders that do not directly sit on the steering committee. A steering committee can only have a limited number of members. It is the job of the steering committee to represent those that do not have a direct representative in the governance structure.
- Ensures equality in decision-making. The steering committee must make sure the project meets the needs of as many participants as possible. This means it must fairly weigh all requests and act impartially to do the most good with the resources it has available.
- Acts as the ultimate decision maker in handling political, legal, organizational, technical, cost, management, cultural and personnel issues. There has to be a forum for making final, and sometimes difficult, decisions. This is the main purpose of the steering committee.

(Adapted from <http://www.ruhkn.org.com/2010/03/purpose-and-rules-of-a-project-steering-committee>)



## Appendix 2 cont: Project Reference Group document (2/3)

**Subtropical Bananas**  
**Market Development Implementation**  
**Steering Committee/Project Advisory Group 2013**

**ROLE OF WORKING GROUP**

1. Provide advice and recommendations to Project Manager/IDO
2. Monitor and evaluate project achievements against projected outcomes
3. Ensure cost effective delivery of project objectives

**RESPONSIBILITIES**

1. Ensure strategies align with wider Strat Plan for ST Bananas, and Australian Banana Industry
2. Prioritise strategies and tactics to achieve proposed outcomes
3. Ensuring strategies and projects are realistic and achievable

**MEMBERSHIP for Project BA 12000**

1. A delegate from each of the existing BGAs (or combined representation)
  - Nambucca
  - Coffs Harbour/Woolgoolga
  - Tweed/Brunswick
  - Richmond
2. A wholesaler/consolidator operating within one of the recognised ST growing regions
3. Industry Development Officer

A Chair to be elected from within the WG membership

The Chair of the WG may invite other people to attend meetings as required

**Potential for other members**

1. A delegate from each of the recognised ST growing areas: Carnarvon, Caboolture and Bundaberg
2. A retailer operating within one of the recognised ST growing regions
3. A general member with knowledge of market development
4. Other

**MEETINGS**

Page 2



## Appendix 2 cont: Project Reference Group document (3/3)

Subtropical Bananas  
Market Development Implementation  
Steering Committee/Project Advisory Group 2013



As per project requirements:

- at least one face to face meeting
- monthly or bi-monthly teleconference
- meeting secretary (IDO for minutes, and circulate to members)
- agenda and meeting papers to be circulated (IDO)
- Determine who has authority to call meetings

#### COMMUNICATION AND REPORTING

As per individual project requirements:

A feedback mechanism to be in place for final reporting on project aims and outcomes

A survey on project outcomes achieved; role of Industry Development Officer.

A written report from the Steering Committee with reflections of their experience, issues which arose, and outcomes for the project. Delegated Steering Committee member to compile report, and to be signed off by all members.



## Appendix 3: Action Plans developed from Workshop A

## Action Plan 1

Situation: SUBTROPICAL BANANA INDUSTRY WORKSHOP A FEBRUARY 2013

Opportunity Title: Working Together

Objective/Goal: Summarise the objective; ensure it is: Specific, Measurable, Attainable, Realistic, and Time-based	Grower Collective/Group
The Problem: Consider: What is the problem being solved? Who benefits? How big is the benefit?	How to attract growers: <ul style="list-style-type: none"> <li>- collective bargaining power</li> <li>- increased price for fruit</li> <li>- opportunities for value adding</li> <li>- shared info</li> <li>- What type of legal structure</li> <li>-</li> </ul>
Risks: Lost risks, issues and potential delays	Lack of grower commitment Lack of trust Quality control
Action: List task that need completing (in order) Create a 'To Do' list for each task List stakeholders	Lobby for Levy funding project scope access for Government funding Brand support
When Define Timelines	Now
Who: Who is going to do it? Who will lead/support?	Grower Collective Wholesaler Industry Consolidator IDO

## Appendix 3 cont: Action Plans developed from Workshop A

## Action Plan 2

Situation: SUBTROPICAL BANANA INDUSTRY WORKSHOP A FEBRUARY 2013

Opportunity Title: Marketing Group

Objective/Goal: Summarise the objective; ensure it is: Specific, Measurable, Attainable, Realistic, and Time-based	Form a Group: <ul style="list-style-type: none"> <li>- Marketing Plan</li> <li>- Source Marketing Agent</li> <li>- Deliver to Market – 1 Product; 1 Brand; 1 Identity; 1 Contact point</li> </ul>
The Problem: Consider: What is the problem being solved? Who benefits? How big is the benefit?	<ul style="list-style-type: none"> <li>- Where does authority come from?</li> <li>- Volunteers?</li> <li>- Growers making financial commitment to Plan</li> <li>- Growers</li> <li>- Increased profit with consistent product</li> </ul>
Risks: List risks, issues and potential delays	Quality control funding distance between growers
Action: List task that need completing (in order) Create a 'To Do' list for each task List stakeholders	Open call to growers to be involved Follow up with personal invitation Develop committee/group structure Source advisors based on agenda/issues
When Define Timelines	Current
Who: Who is going to do it? Who will lead/support?	IDO 4 x growers Advisory Group

## Appendix 4: SWOT Analysis by Project Reference Group for Grower's Collective and Marketing

SWOT Analysis of Grower Collective	
<b>Strengths:</b> <ul style="list-style-type: none"> <li>· some growers to demonstrate best practice/quality standards</li> <li>· develop other markets</li> <li>· wholesaler as hub</li> <li>· stronger as a group</li> <li>· lines of communication</li> <li>· backbone to differentiation message</li> <li>· identify specific product lines</li> </ul>	<b>Weaknesses:</b> <ul style="list-style-type: none"> <li>· lack of cohesive growers</li> <li>· no genuine commitment</li> <li>· lack of trust in general</li> <li>· quality and supply variance</li> </ul>
<b>Opportunities:</b> <ul style="list-style-type: none"> <li>· utilise cultural structure</li> <li>· sell under collective brand/identity</li> <li>· wholesaler as hub</li> <li>· communications to consumer/customer</li> <li>· develop other markets across lines</li> <li>· pinning down task as key attribute</li> </ul>	<b>Threats:</b> <ul style="list-style-type: none"> <li>· lack of engagement from growers</li> <li>· divergence of growers/regions/geographic location</li> <li>· quality variance</li> <li>· marketing by other groups doing something similar or same</li> </ul>

SWOT analysis of Marketing Group	
<b>Strengths:</b> <ul style="list-style-type: none"> <li>· engage growers</li> <li>· produces substantiation for funding applications</li> <li>· cohesive product for differentiation</li> </ul>	<b>Weaknesses:</b> <ul style="list-style-type: none"> <li>· too soon</li> <li>· lack of experience</li> <li>· less important than establishing the grower's group</li> </ul>
<b>Opportunities:</b> <ul style="list-style-type: none"> <li>· ready to market</li> <li>· as a group – able to produce volume</li> <li>· work collectively</li> <li>· enlist consultant for expertise</li> </ul>	<b>Threats:</b> <ul style="list-style-type: none"> <li>· failure</li> <li>· lack of capability/experience/expertise</li> <li>· lack of funding</li> <li>· growers not remaining committed</li> </ul>



## Appendix 5: Invitations sent to growers and industry affiliates for Workshop A



*Interested in a future for our banana industry and your own livelihood? Then you should attend the*

**Subtropical Banana Market Development Workshop**

This workshop will be discussing three main topics that are vital to your future:

- **Presentation & packaging** - *what can be done better?*
- **Demand chain forum** – *hear direct from wholesalers and retailers*
- **Identifying opportunities** – *where can you get more money for your bananas?*

Special guest speakers will be:  
**Peter Thompson**, from Packaging Traders Pty Ltd  
 & **Peter McGregor**, LabelPress, Brisbane

The MC for the workshop will be **Tristan Kitchener** who has been involved in subtropical banana market development in the past and has worked across the supply chain and the banana industry, so he knows the issues and problems that the subtropical industry faces.

The Workshop will be held in both northern and southern regions with inputs amalgamated from them into recommended actions. You are invited to attend either:


Northern:  
**Murwillumbah -Thursday 14 February, Murwillumbah Show Ground, The Function Room**  
**OR**  
 Southern:  
**Coffs Harbour -Saturday 16 February, Coffs Show Ground, Norm Jordan Pavilion**

Each workshop will begin at 8.30am for a 9am start, with lunch and refreshments provided through the day. The bar will also be opened at the end, around 4.30pm, for informal drinks.  
 (See reverse for draft agenda)

RSVPs appreciated to help with catering purposes to:  
**Geraldine O'Flynn**, Industry Development Officer, 0402 308 970, [goflynn@aapt.net.au](mailto:goflynn@aapt.net.au)

**SPECIAL THANKS**  
 These workshops are funded through a voluntary contribution from the Coffs Harbour & District Banana Growers Association and matched government funds through Horticulture Australia Limited

## Appendix 6: Agenda for Workshop A

 <b>Subtropical Banana Market Development Workshop agenda</b> Thursday 14 February, Murwillumbah Show Ground, The Function Room OR Saturday 16 February, Coffs Harbour Show Ground, Norm Jordan Pavilion	
<b>9.00 AM sharp!</b>	<ul style="list-style-type: none"> <li>Welcome &amp; Introductions</li> <li>Introduction – How did we get here?</li> <li>Objectives &amp; Agenda</li> </ul>
	<ul style="list-style-type: none"> <li>The 'Burning Platform' for Subtropical Banana Growers</li> <li>Demand Insights – what do the consumer and retailers need &amp; want</li> </ul>
	<ul style="list-style-type: none"> <li>Overview of packaging options</li> <li>Stickers – their value and making them stick</li> </ul>
<b>10.50 AM</b>	<b>BREAK</b>
	Panel interview with pre-prepared questions and discussion, attendees to include: <ul style="list-style-type: none"> <li>Retailer</li> <li>Wholesale</li> <li>Packaging supplier</li> <li>Distributor</li> <li>Importer</li> </ul>
<b>12.00 PM</b>	<b>LUNCH</b>
	<ul style="list-style-type: none"> <li>Agree 3 most important supply chain <b>insights</b></li> <li>Agree 3 most important supply chain <b>needs</b></li> <li>Identify Opportunities</li> </ul>
<b>2.00 PM</b>	<ul style="list-style-type: none"> <li>Prioritize each Opportunity – what is important, what is urgent?</li> <li>How 'achievable' are they? Group discussion</li> <li>Select the Top 5 Opportunities</li> </ul>
<b>2.40 PM</b>	<ul style="list-style-type: none"> <li>Prioritize the 5 Opportunities</li> <li>Select the Top 2 Opportunities</li> </ul>
<b>3.10 PM</b>	<b>BREAK</b>
<b>3.25 PM</b>	<ul style="list-style-type: none"> <li>Develop <b>solutions</b> for each of the 2 Opportunities</li> </ul>
<b>3.45 PM</b>	Groups to discuss & develop action plan for Top 2 <ul style="list-style-type: none"> <li>Review the solutions and select preferred options</li> </ul>
<b>4.40 PM</b>	<ul style="list-style-type: none"> <li>What's next?</li> <li>Closing remarks</li> </ul>
<b>4.45 PM</b>	<b>CLOSE &amp; DRINKS</b>



## Appendix 7: Invitations sent to growers and industry affiliates for Workshop B

**WORKSHOP B**  
**TWEED/BRUNSWICK/LISMORE REGION**  
**MARKET DEVELOPMENT**

**REGIONAL NETWORKING OPPORTUNITY**  
**REGIONAL DEVELOPMENT WITH**  
**SUPPLY CHAIN PARTNERS/FOOD INDUSTRY EVENTS**

**THURSDAY 2<sup>ND</sup> MAY 2013**  
**4PM FOR 4.15PM START (FOR APPROX 1 HOUR)**  
**MURWILLUMBAH GOLF CLUB**  
**233 RYANGUM ROAD**  
**MURWILLUMBAH NSW**

FOR MORE DETAILS/RSVP CONTACT GERALDINE O'FLYNN 0402308970

The logo for the subtropical industry, featuring a stylized banana bunch inside a circular frame with the word "SUBTROPICAL" written around the top half of the circle.

**WORKSHOP B**  
**COFFS HARBOUR AND DISTRICT BANANA GROWERS**  
**MARKET DEVELOPMENT**

**REGIONAL NETWORKING AND DEVELOPMENT**  
**SUPPLY CHAIN PARTNERS/FOOD INDUSTRY**

**SATURDAY 22<sup>ND</sup> JUNE 2013**  
**3 – 5 pm**  
**THE BIG BAXANA**  
**351 PACIFIC MOTORWAY**  
**COFFS HARBOUR NSW**

FOR MORE DETAILS/RSVP CONTACT GERALDINE O'FLYNN 0402308970

## Appendix 8: Feedback from Workshop A presenter Kirstie McClean

**Client:** Sub tropical banana growers Geraldine O'Flynn

**From:** Kirstie McClean

**Document:** Feedback on Workshop

Decision to work together

- This is essential from a marketing perspective due to the consistency in product offering and marketing communications.

Lack of marketing research

- Intuitively we know that consumers like smaller (st bananas) however in order to convince buyers we need to show them the evidence. Marketing research would support this.
- Marketing research would also highlight product gaps in the market place, measure uptake of single serves and so on.

Customer groups

- Identification in Coffs Harbour of new customer groups was excellent, which then reduces the reliance on the two major retailers.
- The comment from Ray Fien on targeting smaller retailers like IGA was relevant and was an excellent step forward.
- The groups kept in mind the customer and the consumer (different needs).

Brand differentiation

- Brand differentiation needs to be stronger and clearer – this would involve more education to both customer and consumer groups.
- Clearer marketing collateral would assist, particularly at point of sale.
- Stickering was discussed at length as well as other packaging solutions. Marketing research would also assist in answering this question.

Internal marketing

- Can we use marketing so the growers become more collegial? Like sharing ideas on products, packaging, networks, customers and marketing.

**Future ideas**

Public relations

- Generate news stories on the industry.
- Increase demand using generic marketing strategies

Sales person/group

- Sell to wholesalers, retailers directly and open up other avenues (eg schools, aged care)

Lobbying ABGC/other groups for funding

- More marketing funding to educate the markets on the benefits of ST Bananas.

Kirstie McClean April 2013

Appendix 9: Media release to local media outlets following Workshop A made by Banana Industry Communications consultant  
Media release Monday 18 February 2013

## **LOCAL BANANAS NEED MORE MARKETING – FORUM AGREES**

Local banana growers agree that more needs to be done to market the local product, but a lack of funding, widespread support and varying standards are major issues.

Two forums have just been held for growers on the far north and mid north coast of New South Wales and attracted only 20 growers plus other industry representatives.

“Even though attendance was poor, we had good discussion about the issues facing local growers in an industry which is facing hard competition from large scale producers in far north Queensland. Most are small family farms and many of them have their own supply chains into major wholesalers or local markets.” Subtropical Market Development Industry Officer, Ms Geraldine O’Flynn, said today.

“Growers at the forum agreed that quality varies too much and we need to set some specifications before we market subtropical bananas strongly. Because they take twice as long to grow here, they tend to be more marked, but at the same time they develop a full sweeter flavour which is their main point of difference,” Ms O’Flynn said.

A common outcome to both forums was that growers needed to collaborate more to develop and promote subtropical bananas.

“Many growers have developed their niche, but others are looking to work together collectively. There are benefits in growers working collaboratively, as has been seen with Western Australia’s Sweeter Banana Co-operative,” Ms O’Flynn said.

Ms O’Flynn said growers expressed frustration with the national marketing campaign which up to this point hasn’t included funding to support local marketing initiatives.

“We will be looking at creating product specifications, which include determining the preferred size and ripeness, and research on where marketing opportunities can be developed.”

### ***For more information:***

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***Geraldine O’Flynn***

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Appendix 10: Final media release to local media outlets made by Banana Industry  
Communications consultant  
Media release Tuesday 30 July 2013

## **REGIONAL GROWTH KEY TO SUBTROPICAL BANANA INDUSTRY'S FUTURE**

The future of the subtropical banana industry in New South Wales is in a better position now through efforts to boost regional market development over the past two years.

This is according to the Subtropical Banana Market Development Project Reference Group that was established to guide activity to build a better business base for the industry.

The Industry Development Officer to the Group, Ms Geraldine O'Flynn, has just completed two projects funded by Horticulture Australia Limited and the NSW industry and the Coffs Harbour and Districts Banana Growers' Association.

"We have developed an online supply directory to provide a central connection point for Subtropical growers to link with wholesalers and retailers, and vice versa. The other project was to build capacity for growers and local wholesalers to engage with other industry affiliates to look for opportunities to grow their markets," Ms O'Flynn said.

"A small but enthusiastic band of growers and wholesalers emerged, and supply chain networks were identified and developed. These included links to retailer groups, agri-tourism potential and areas of value-adding."

The projects followed the development of a three year Strategic Plan for Market Development for the Subtropical Banana Industry, which was supported by the broader banana industry and peak industry body Australian Banana Growers' Council.

"Workshops were held in the Tweed and Coffs Harbour growing regions at which the need for collaborative grower groups and specific marketing for subtropical bananas were identified," Ms O'Flynn said.

A second round of workshops, with marketing and regional food group speakers presenting, further developed the two key issues identified.

"It was agreed that regional identity would be critical to the success of marketing subtropical bananas, as well as their sweeter flavour. Groups like Regional Development Australia and Northern Rivers Foods are really supportive of what the industry is now trying to achieve."

Ms O'Flynn said the projects had seen the emergence of a 'Subtropical Banana' identity with several growers and wholesalers now supporting it with stickering and merchandising, and the Banana Growers' Associations in Tweed/Brunswick, Coffs Harbour and Districts, Richmond, and Nambucca all promoting 'Subtropical Bananas' to their communities at shows and special events.

"The future of the subtropical banana industry is in the hands of the growers so I hope that more will join those who are embracing the need for regional market development."

The online supply directory is accessed via the Australian Banana Growers' Council website at [www.abgc.org.au/banana-industry/links](http://www.abgc.org.au/banana-industry/links)

***For more information:***

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