Understanding demographic of the Australian Blueberry Industry

Phillip Wilk
NSW Department of Primary Industries

Project Number: BB13000

BB13000

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Purpose of this report:
This report is the final report for BB13000 Understanding the Demographic of the Australian Blueberry Industry and is the final milestone 190 for this project which ran from July 2013 to December 2014

Date of report 19th December 2014

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Media summary

The Australian Blueberry industry is a relatively young industry in Australia which began in traditional temperate areas in Victoria in the mid 1980's. Since that beginning blueberries have been planted in all states and since the year 2005 have been expanding at an average growth rate of about 10% per year.

The last survey conducted by the Australian blueberry industry in 2004 determined that Australia produced an estimated 2400 tonnes of blueberries with a farm gate value of $A24 million. Commonly quoted statistics for the industry were collected in 2010 from Australian Bureau of Statistics (ABS) survey results which estimated the Australian blueberry industry to be worth $A80 million. The industry identified that these statistics were significantly out of date and that the industry was considerably larger than figures suggested.

In the 2009-2014 Blueberry Strategic Investment Plan, one of the industry's priorities was to make Australian fresh blueberries available to the consumer for 12 months of the year. This process has largely been achieved by growing new varieties suited to a number of regions and climatic zones predominantly in northern Queensland, northern NSW and in Tasmania. This has largely been achieved due to strong domestic demand for all berries.
Berry consumption including raspberries, blueberries and strawberries has increased worldwide due to the perceived health benefits of regularly consuming these products. Of all the berry categories, blueberry has outperformed all other berry categories and consumption although quite small in Australia relative to other countries, continues to grow especially in the over 50's demographic.

The major limitation to planning for this expansion is the lack of up to date information about the size and production of the industry in the various growing regions. The information that is lacking includes data on the area under cultivation, tree numbers, varieties grown, production methods and future expansion potential. A clear understanding of the operational demographics will help the industry, individual growers and government agencies plan and meet the future challenges to ensure and maintain a sustainable and profitable future.

This project conducted a national grower survey both electronically and by telephone to try to capture data about as much of the Australian blueberry production as possible across all states, to enable future planning. The data has been collated and is presented in an industry database and is made available online to growers as well as being available to planners.

The project found that Australian fresh blueberry production has tripled since 2007 with a total production volume of 6100 tonnes in 2013/14; this large increase coupled with a further 498 hectares of plants which will produce approximately 4530 tonnes of fruit in the next 4 years indicates the need to work hard to access further export markets and to continue funding research and development projects.

This work was presented to the industry through a presentation at the Australian blueberry annual growers meeting in November 2014 as well as being made available on the Australian Blueberry Growers Association (ABGA) website and via the industry journal "Australian Blueberry Grower spring 2014 Journal No.33".

Introduction

The Australian blueberry industry has rapidly expanded over the last 10 years at an approximate average rate of around 10% per annum.

The last blueberry industry survey was conducted in 2004 and the most recent commonly quoted statistics for the industry were collected in 2012 from the Australian Bureau of statistics (ABS) survey results. The industry has identified that these statistics were significantly out of date and that the industry was considerably larger than these figures suggest. Just how big was unknown.

The Australian Blueberry Growers' Association is the peak industry body for blueberry growers. One of the main priorities of the Australian Blueberry Industry 2009-2014 Strategic Investment Plan; a joint initiative between ABGA, HIA Ltd and the NSW DPI was to make Australian fresh blueberries available to the consumer for 12 months of the year. This has largely been achieved by extending the season with the development and growing of new varieties. These newer varieties are better suited to non-traditional climatic zones predominantly in northern Queensland, northern NSW and Tasmania.

Berry consumption including raspberries, blueberries and strawberries has increased worldwide due to the perceived health benefits of regularly consuming these products. Of all the berry categories, blueberry has outperformed all other berry categories and consumption although quite small in Australia relative to other countries continues to grow especially in the over 50s demographic.

A current limitation to planning for this expansion is a lack of up to date information about the size, resource availability and production of the industry in various growing regions. This lack of information includes data on the area under cultivation, tree numbers, varieties grown, production methods and future expansion potential.

A clear understanding of the operational demographics will help the industry, individual growers and government agencies plan for this expansion and meet future challenges to ensure and maintain a sustainable and profitable industry.

This project conducted a national grower survey both electronically and by telephone to try to capture as much of the Australian blueberry production as possible across all states, to allow future planning. The data has been collated and presented in an industry database and made available online to growers as well as being available to planners.

This work was presented to the industry through a presentation at the Australian blueberry annual growers meeting in November 2014 as well as being made available on the ABGA website and via the industry journal "Australian Blueberry Grower spring 2014 Journal No.33".

Methods

The survey was designed to obtain current production, management and marketing information for the Australian blueberry Industry. The information will be used for a number of future options including formulating a new strategic investment plan in 2015 to help set direction for industry development to 2019.

This survey was required to obtain a snapshot of the current blueberry industry as the last industry survey was completed in 2004. Since that time there has been a rapid growth in the industry which has no perception of its current production and size.

The first step when developing this survey was to obtain a list of growers and their details from databases and other sources. Once this had been completed a survey based on information required by the industry was developed and tested on a small number of growers and changes were made as necessary; a copy of the survey questions is attached in Appendix A.

The survey was sent out electronically to growers and reminders were sent out to prompt growers to complete the survey. If a response was not completed electronically, growers were contacted by phone and a time was booked to complete the survey. The growers were phoned three times between the hours of 7pm and 10pm and if there was no response they were removed from the list. In the next step the data was “cleaned”, analysed, interpreted and a report compiled.

Once the surveys had been completed and the data was compiled an article for the ABGA journal was published and a press release was written and distributed to a number of media outlets relating to the growth of the blueberry industry. This communication strategy has resulted in a number of media interviews. A PowerPoint presentation consisting of the results from the survey was delivered to the Australian Blueberry Growers’ Association (ABGA) annual general meeting (AGM) on the 11th November 2014 at Coffs Harbour.

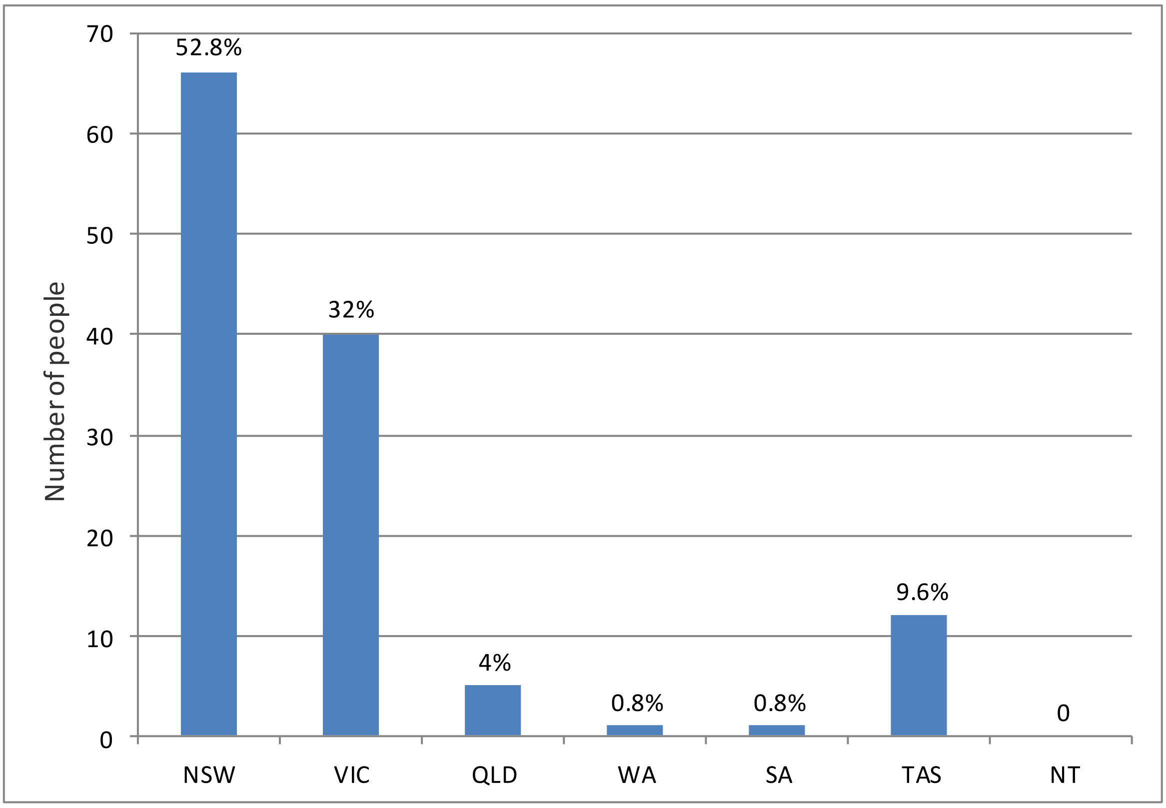
A copy of the final report will be uploaded on the Australian Blueberry Growers Association (ABGA) website so that all members will be able to view and read the final report.

Results and Discussion

This report is a presentation of the data from the 2013 /14 season collated from a voluntary electronic survey completed by June 2014 at season's end. Although the survey was voluntary, growers were contacted by phone if a response was not completed electronically. This approach eventually gave a response rate of around 87% with a total of 127 growers taking part. The non-respondents together comprised less than 10% of the total Australian blueberry crop.

It is recommended that a regular survey similar to this should be undertaken by the industry at least every two years to support and understand the industry position and scope.

Figure 1: Response to survey from each state

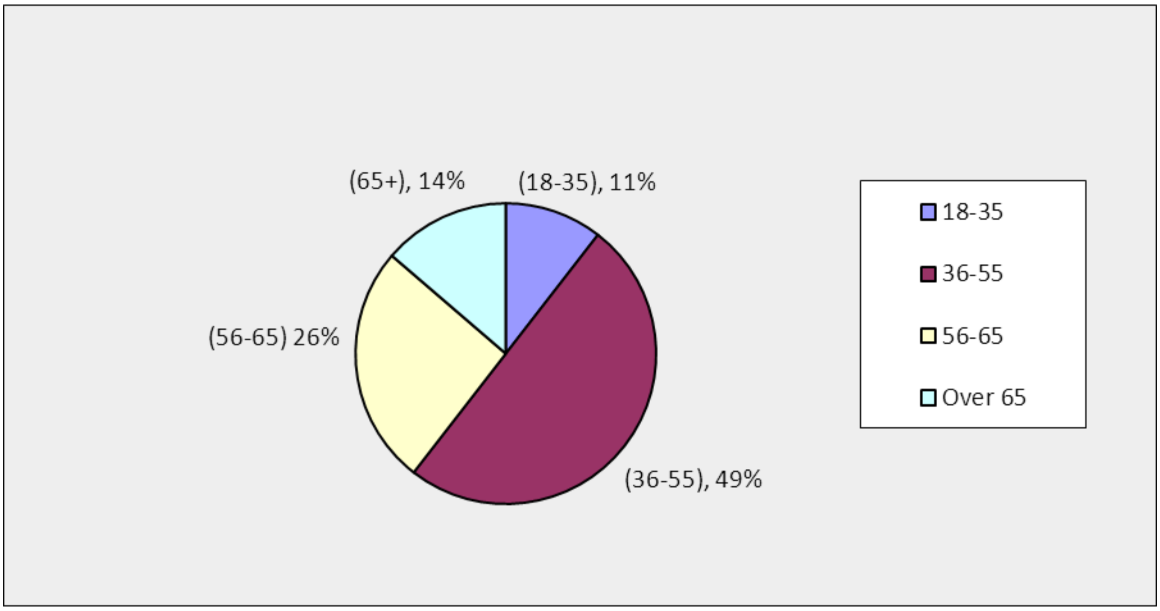


Located below is the list of questions that growers were asked and a summary of the responses to these questions. The raw data has been formulated into graphs and tables to make it easier for the audience to get a clear snapshot of the current blueberry industry.

Question 1

What is the age of the primary person running the farm?

Figure 2: Age summary for the primary people running blueberry farms in 2013/2014

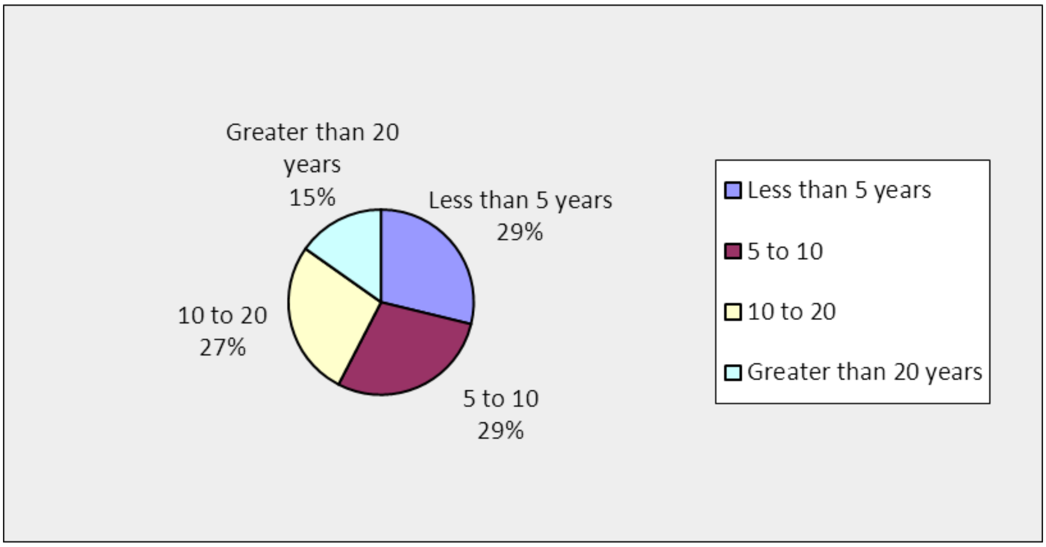


The most common age group for the primary person running the blueberry orchard is 36-55 with a total of 49%. This is a relatively younger group when compared to the mean age of growers in other agricultural industries is 55+. This total (49%) for the 36-55 age group is expected to be higher as often fathers had overall control of the farm with their children being the actual managers who did all the work and decision making on the farm. Due to the large range of ages in each group categories e.g. 36-55 we are unable to assess an accurate age of growers. In future surveys I recommend that class groups are as follows: under 30, 30-40, 40-50, 50-65, over 65.

Question 2

How many years have you been growing blueberries?

Figure 3: Number of year's participants have been growing Blueberries 2013/2014

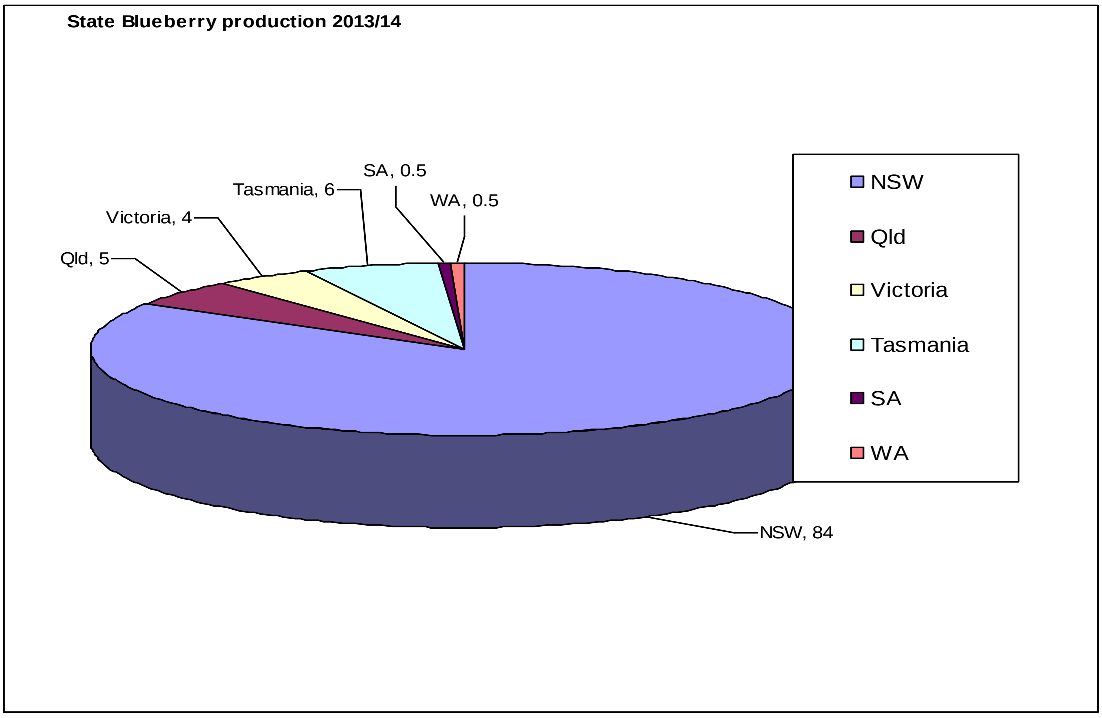


58% of growers have been growing blueberries for less than 10 years, this supports the idea that the blueberry industry is still relatively young and therefore needs support and guidance to grow. There is an opportunity to encourage and support young or new growers by providing suitable networking activities.

Question 3

In which state and region is your farm?

Figure 4: Percentage of state blueberry production 2013/2014



NSW is still by far the largest producer of blueberries in Australia; with more than 80% of national production. Production has significantly increased both in Queensland and Tasmania, with production growing from about 1% to 5% and 2% to 6% respectively since 2011 (ABS Stats 2010/11).

The increase in production in Queensland has occurred in order to take advantage of the early flowering and fruiting times which should produce fruit during the winter period of June, July and August. Plantings are being established in Northern and Eastern Tasmania to produce fruit as late as possible at the tail end of the season in the March, April time slot.

Having fruit available in the beginning and tail ends of the season is where best returns are for growers at $60/tray as opposed to $25 to $30 in the middle of the season. Having a longer growing season will result in a more consistent supply to supermarkets. This will have positive implications for consumers as it will even out the prices for consumers to about $3.50 to $4.00 per 125g punnet throughout the year.

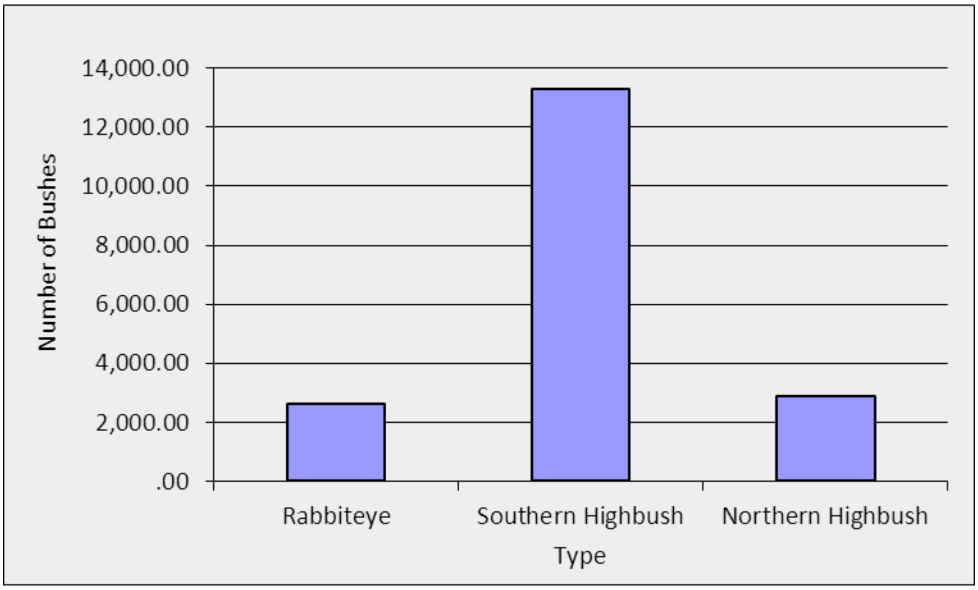
Question 4

Per type, how many BUSHES do you grow that are producing blueberries?

Table 1: Total and average number of bushes producing blueberries per type amongst respondents in 2013/2014

Variety	Response Average	Response Total
Southern Highbush	13,289	970,085
Northern Highbush	2,868	186,396
Rabbiteye	2,609	161,790

Figure 5: Average number of blueberry bushes producing blueberries per type in 2013/2014

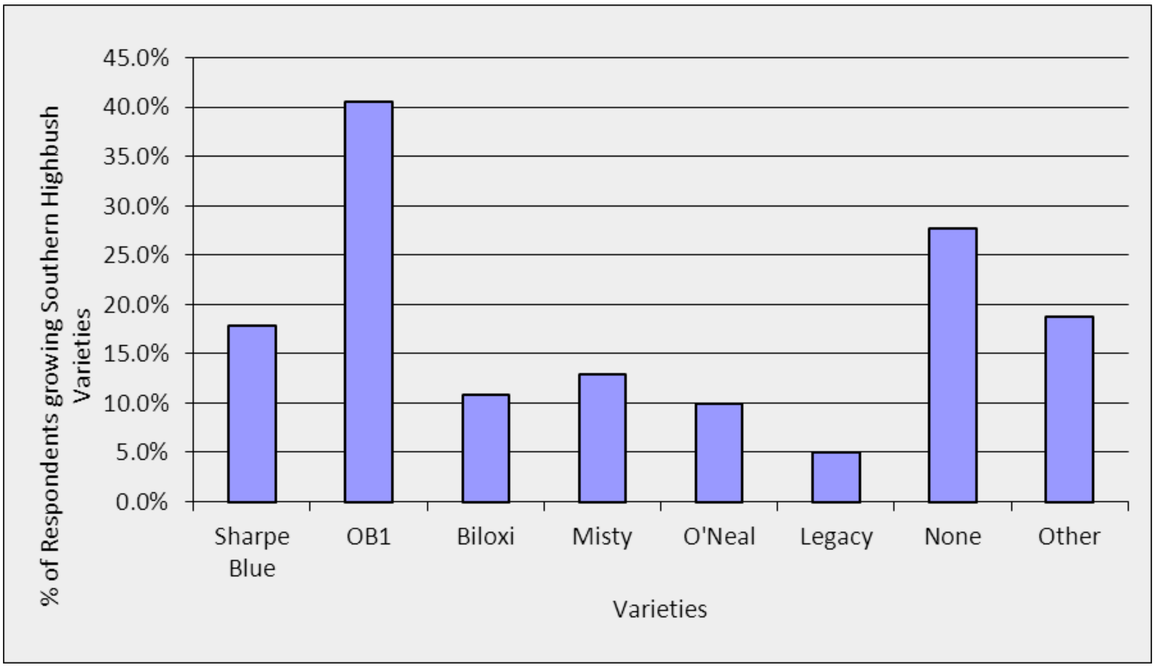


Southern Highbush is by far the most commonly grown out of the three varieties. The response average for Southern Highbush was approximately 5 times the response average for Rabbiteye and Northern Highbush which had similar numbers to each other. This means that respondents have approximately 5 times the amount of Southern Highbush varieties producing fruit than the Rabbiteye and Northern Highbush varieties. Including only those who responded to this question there is currently 970 085 Southern Highbush, 186 396 Northern Highbush and 161 790 Rabbiteye bushes currently producing berries; this equates to 1, 318 271 bushes currently in the ground and producing berries.

Question 5

Which Southern Highbush varieties do you grow?

Figure 6: Percentage breakdown of Southern Highbush varieties being grown in 2013/2014

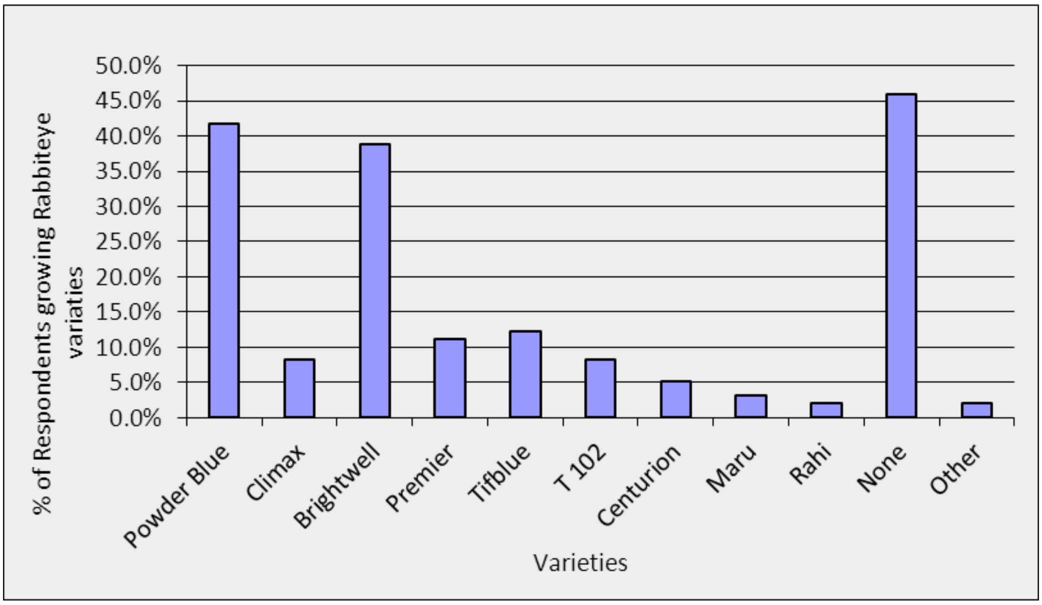


The Southern Highbush varieties are by far the major group being grown. OB1 is one of the most widely grown varieties with approximately 40% of respondents growing Southern Highbush plants are growing this variety. Many Northern NSW and Southern Queensland growers are now entering into agreements with private companies and growing higher yielding, better quality newer Southern Highbush varieties; some of these varieties include 11-11, 42, 390, Snowchaser, Eureka and Meridian. These varieties have good soil adaptability, have larger fruit, heat tolerance and a requirement for low winter chilling. This makes them suitable for areas in Northern New South Wales and Southern Queensland where the winters are mild and the summers can be quite hot.

Question 6

What Rabbiteye varieties do you grow?

Figure 7: Percentage breakdown of Rabbiteye varieties being grown in 2013/2014



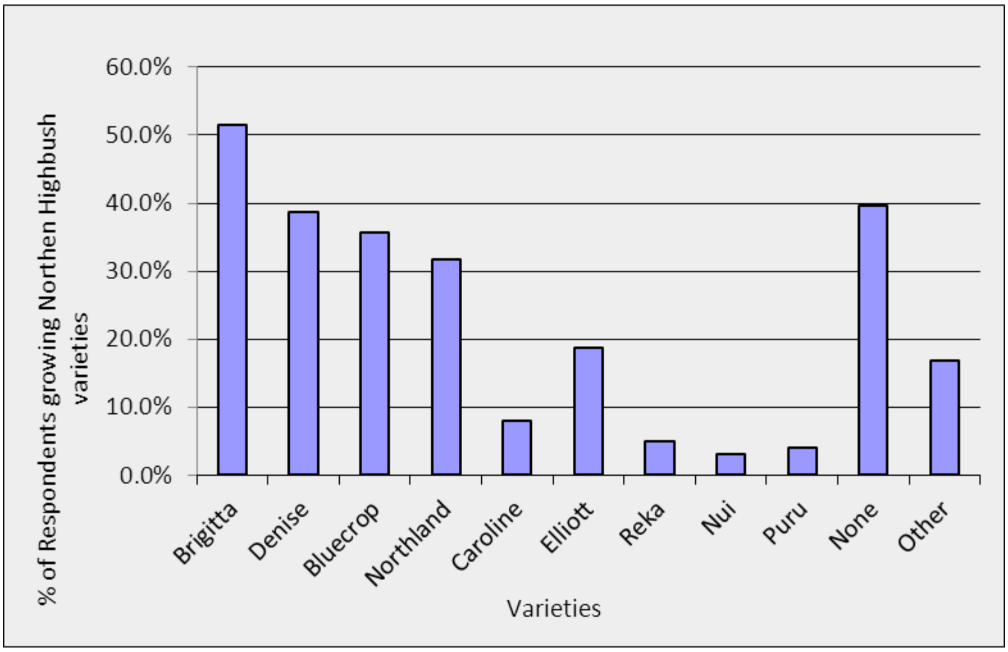
The Rabbiteye varieties provide growers with a late season variety which will help to extend the harvest. Rabbiteye have fewer chilling requirements than Northern Highbush and are more tolerant to a wider range of climates than Southern Highbush. Rabbiteye have firmer berries and thicker skin making it a more resilient variety.

The most commonly grown Rabbiteye varieties are amongst the respondents are Powder Blue (41.8%) and its pollinator Brightwell (38.8%).

Question 7

What Northern Highbush varieties do you grow?

Figure 8: Percentage breakdown of Northern Highbush varieties being grown in 2013/2014



51.5% of respondents who are growing the Northern Highbush varieties grow Brigitta. Other popular varieties include Denise, Bluecrop and Northland.

Question 8

How many HECTARES or ACRES of blueberries do you have planted over 4 years old?

Figure 9: Number of hectares of blueberries under production in 2013/2014

The total number of hectares planted and under full production in 2013/2014 was 1100 hectares. Both hectares and acres were included as options in the survey; this was to cover all bases as some growers may know their property in acres not hectares or vice versa. All acres were converted to hectares once the questionnaire was completed to ensure results were reliable. This question asked growers how many hectares of blueberries planted were under and over 4 years separately; the reasoning behind this is that a blueberry plant is under full production from year 4 onwards. The question therefore allows us to determine not only how many hectares are currently producing fruit but also predict how many hectares will start producing fruit from the season of 2014.

How many HECTARES or Acres of blueberries do you have planted under 4 years old?

Table 2: Production area increase in blueberry planting by states (hectares) (young plants 1-4 year old already planted but not yet producing in the 2013/14 season)

	NSW	Qld	Vic	Tas	WA	SA	Total
Hectares	256	90	30	60	60	2	498
Percent of total	57%	20%	7%	13.4%	13.4%	1%	%100
Fruit production Increase(t)	1792.0	315.0	480.0	960.0	960.0	32.0	4530.0

Assumptions

1. NSW and Qld grow SH varieties@3500plants/ha and will bear 1kg/plant in year 2 and 2 kg in year three

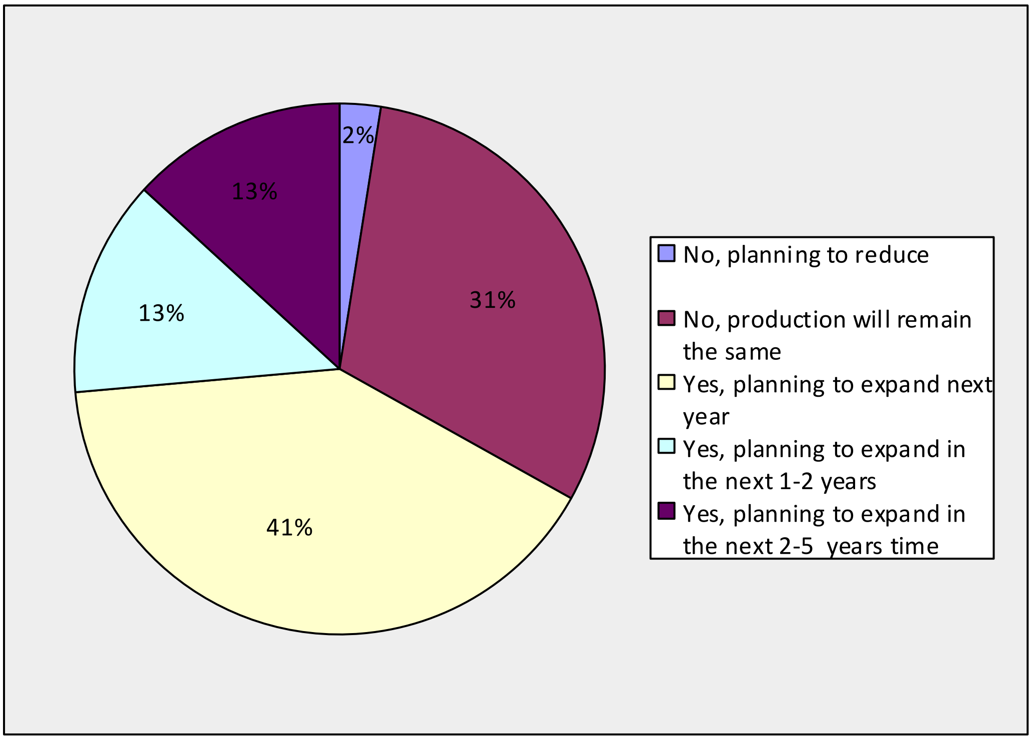
2. Victoria, Tasmania, WA and SA grow NH varieties which take 4-5 years to bear fruit with 2000 plants/ha but which yield 1-2 kg/ plant in year 4 or 5 but eventually yield 8-10 kg in year 6 or greater

The main points that come out of this table are; 498 hectares of blueberries will begin producing fruit from the season 2014. This means that the total increase in fresh fruit in 4 years will be an increase of 4530 tonnes or a 75% increase from 6100 tonnes in 2013. New South Wales is the largest area increase with mainly Southern Highbush varieties, Tasmania, Queensland and Western Australia are rapidly expanding production also. From these data it is evident that the blueberry industry will need to work hard to sell this fruit and maintain returns to growers. This is why the ABGA is currently working to gain export markets that will take pressure off the domestic markets.

Question 9

Are you planning to expand your production?

Figure 10: Percentage of blueberry growers planning to expand production from 2013/2014

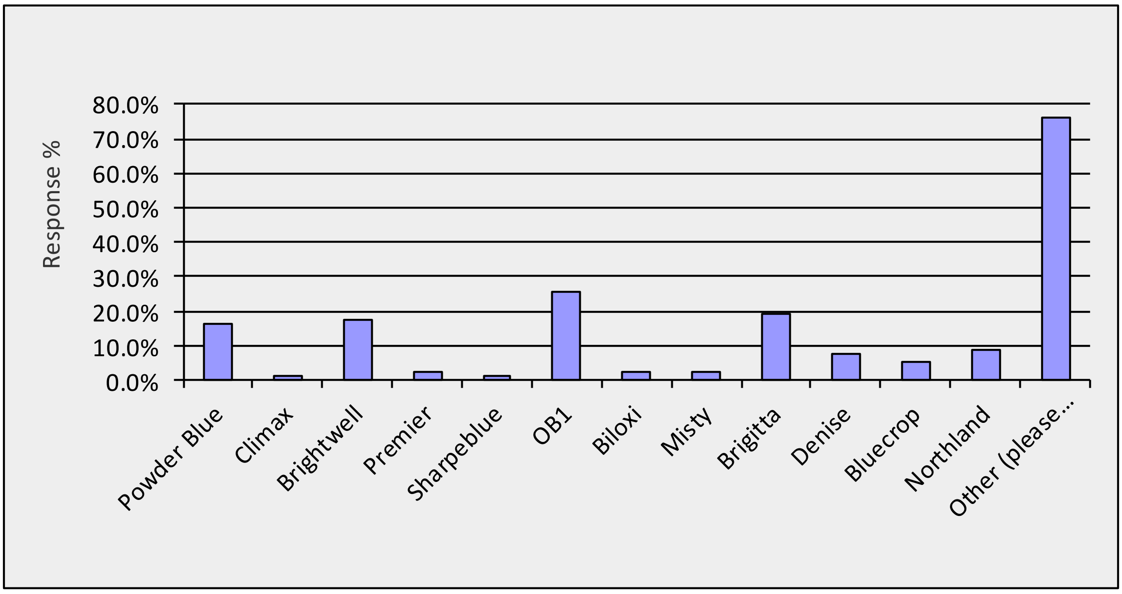


From the 121 people who answered this survey question 67% of them are planning to expand over the next 5 years with 40.5% of those planning to expand in 2015. On average those who want to expand are expecting to expand by 9 hectares; taking into account the number of respondents this would equate to approximately 500 hectares of blueberries being planted in the next 5 years. This expansion along with 498 hectares already in the ground but not producing blueberries will mean there will be a large increase in blueberry production over the next 10 years. This expansion will need careful planning and the involvement of a range of industry bodies to maintain profitability in the industry and ensure that the end product is both beneficial and sustainable to ascertain the future of the industry is secure.

Question 10

What varieties are you expecting to plant?

Figure 11: Blueberry varieties growers are expecting to plant in the next 1-5 years

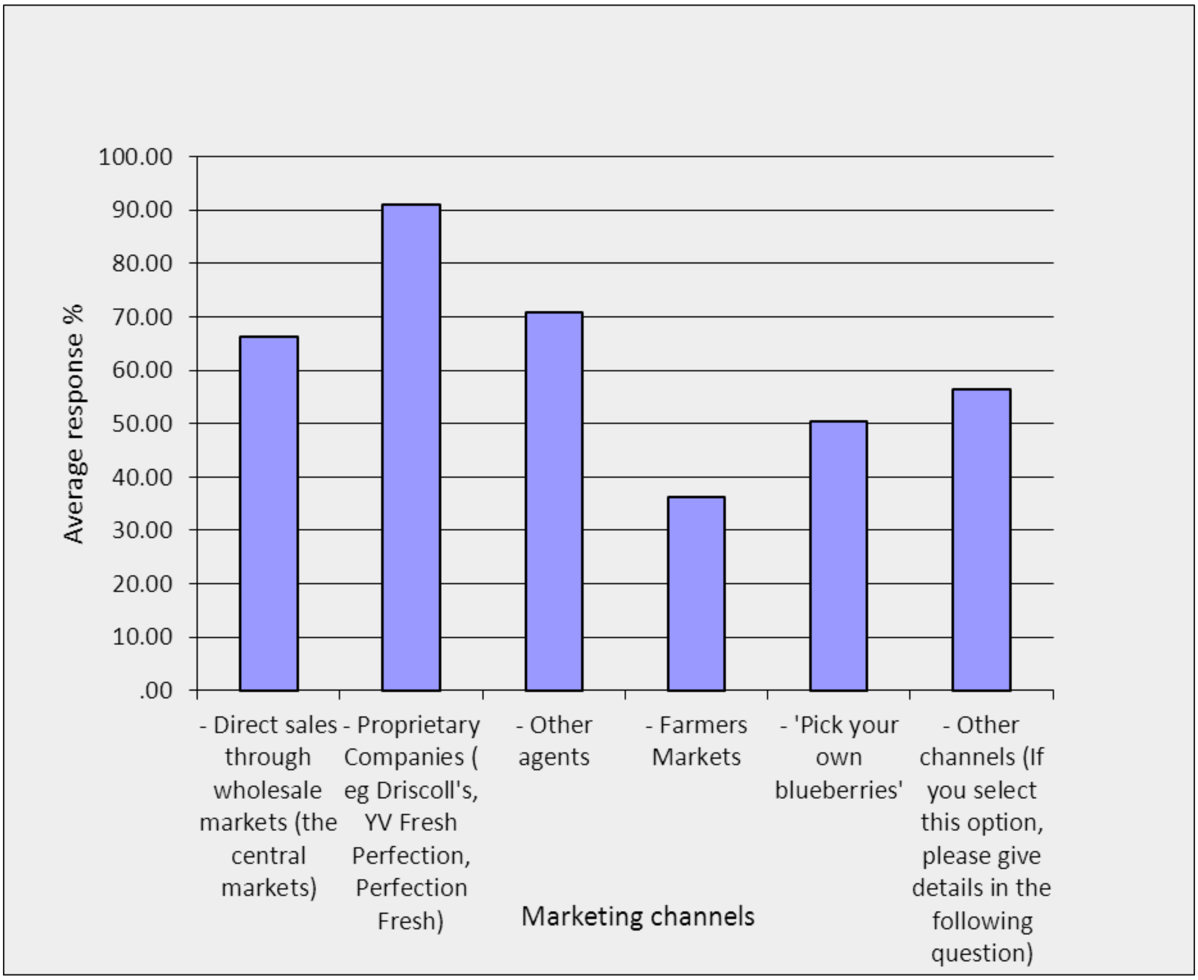


A large proportion of growers (76%) are planning to plant (PBR) private varieties such as Star, 11-11, 42, Snowchaser, Elliot, Duke, Caroline and 390. The public domain varieties that growers will be wishing to expand with are the Southern Highbush variety OB1, and Rabbiteye varieties such as Powder Blue and Brightwell to extend their picking season.

Question 11

What % of your crop is normally marketed through direct sales, proprietary companies, other agents, farmers markets, own marketing or other channels?

Figure 12: Average response for how blueberry growers market their fruit

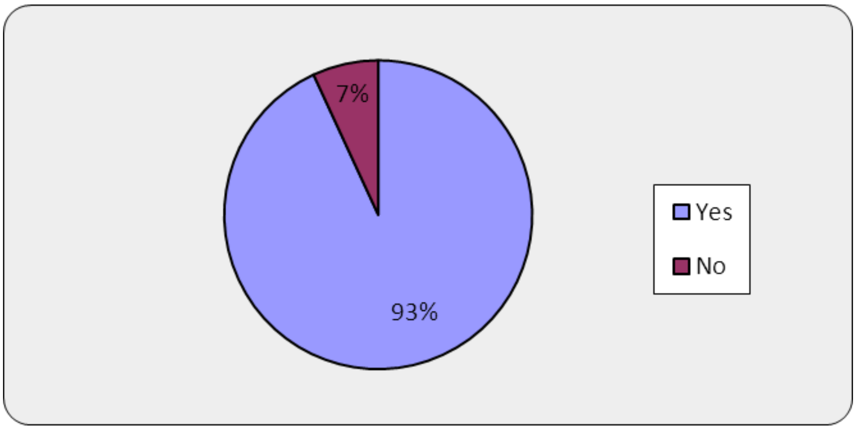


As shown in the graph a large percentage of grower's crops are marketed through proprietary companies such as Driscolls and YV Fresh, direct sales through wholesale markets and through other agents. Those who are marketing through other channels are selling direct to retail outlets such as local supermarkets and fruit shops, hotels and resorts, restaurants and direct to consumers via roadside stalls, farm shed sales, etc.

Question 12

Are you a member of The Australian Blueberry Growers' Association?

Figure 13: Percentage of respondents that are a member of the Australian Blueberry Growers Association 2013/2014

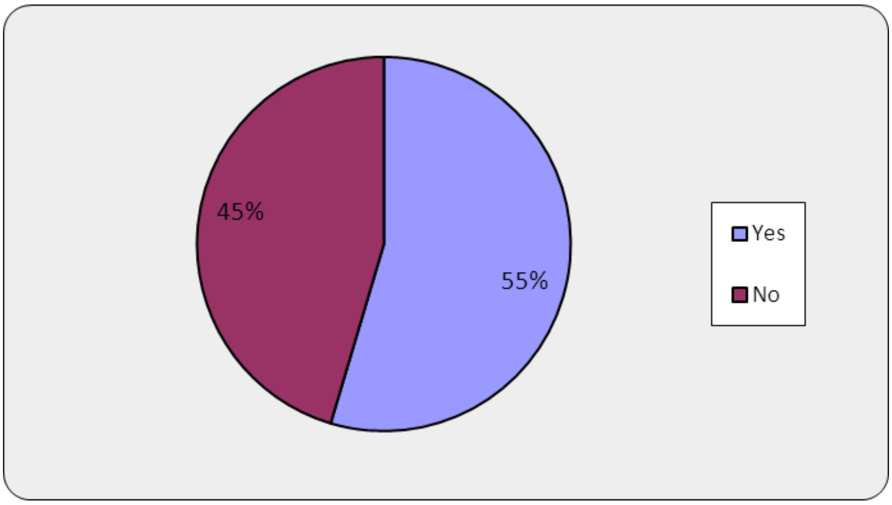


Of the growers who answered this question, 93% are members of the Australian Blueberry Growers Association. This is a large percentage of growers and supports the idea that the ABGA journals, newsletters and website is an excellent means of disseminating information and resources developed for growers. In future surveys it may be beneficial to have a follow up question asking non-members why they are not part of the ABGA. This information could guide changes in the association and may potentially lead to an increased number of members.

Question 13

Has your agent been instructed to collect a voluntary levy on your behalf?

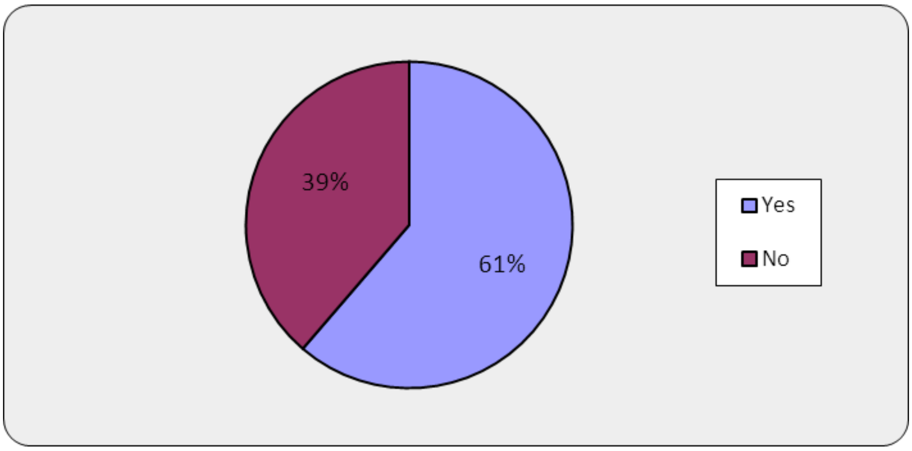
Figure 14: Percentage of agents instructed to collect a voluntary levy on behalf of respondent



From the 97 people who completed this question 55% had been instructed by their agent to collect a voluntary levy on their behalf.

Are you in favour of the Australian Blueberry Growers' Association moving to a compulsory industry levy scheme?

Figure 15: Percentage of respondents in favour of the Australian Blueberry Growers' Association moving to a compulsory industry levy scheme

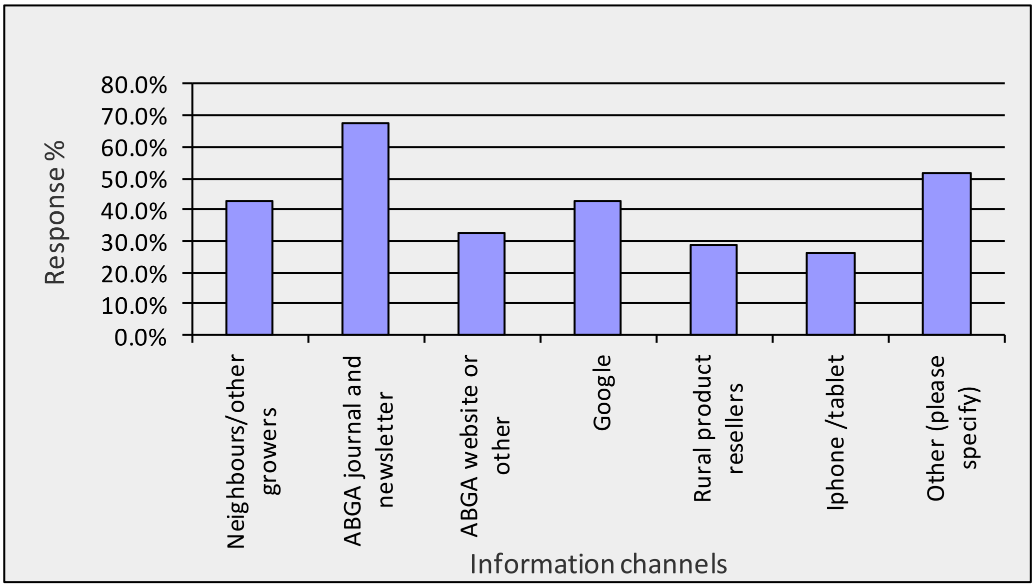


Currently the Australian Blueberry Growers Association is under a voluntary levy scheme and 61% of growers want to move to a compulsory industry levy scheme. Levy contributions are used for research projects co-funded by Horticulture Innovation Australia Limited and research providers. These projects focus on increasing grower productivity and quality. Unmatched levy funds are also being used for administration marketing and promotional programs.

Question 14

How do you normally receive your information for best management practices in blueberry production? (E.g. chemical registrations, new products and practices)

Figure 16: Methods used by blueberry growers to receive information for best management practices

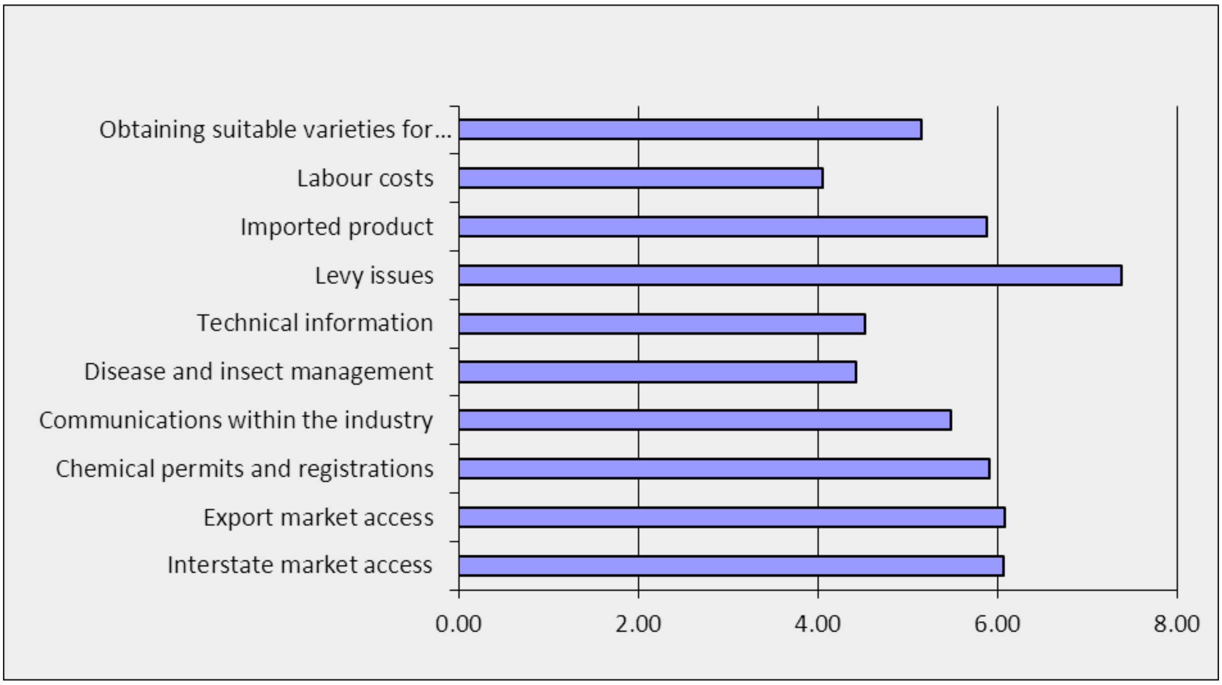


Large proportions (67.5%) of respondents receive their information for best management practices in blueberry production via the ABGA journal and newsletter, 43% received their information from other growers/neighbours and 43% from Google. People who specified other means of sourcing information included NSW DPI, field days, via email, agronomists and overseas tours; these could potentially be used as categories in future surveys.

Question 15

Number in order the key issues affecting you as a blueberry producer. Put 1 to 10 alongside each item with 1 being the highest priority and 10 the lowest priority. Please use the drop down-box to change the numbering or you can drag and drop the following choices in order of preference, with your top choice in the first position.

Figure 17: Key issues affecting blueberry producers in order from 1 (highest priority) to 10 (lowest priority)



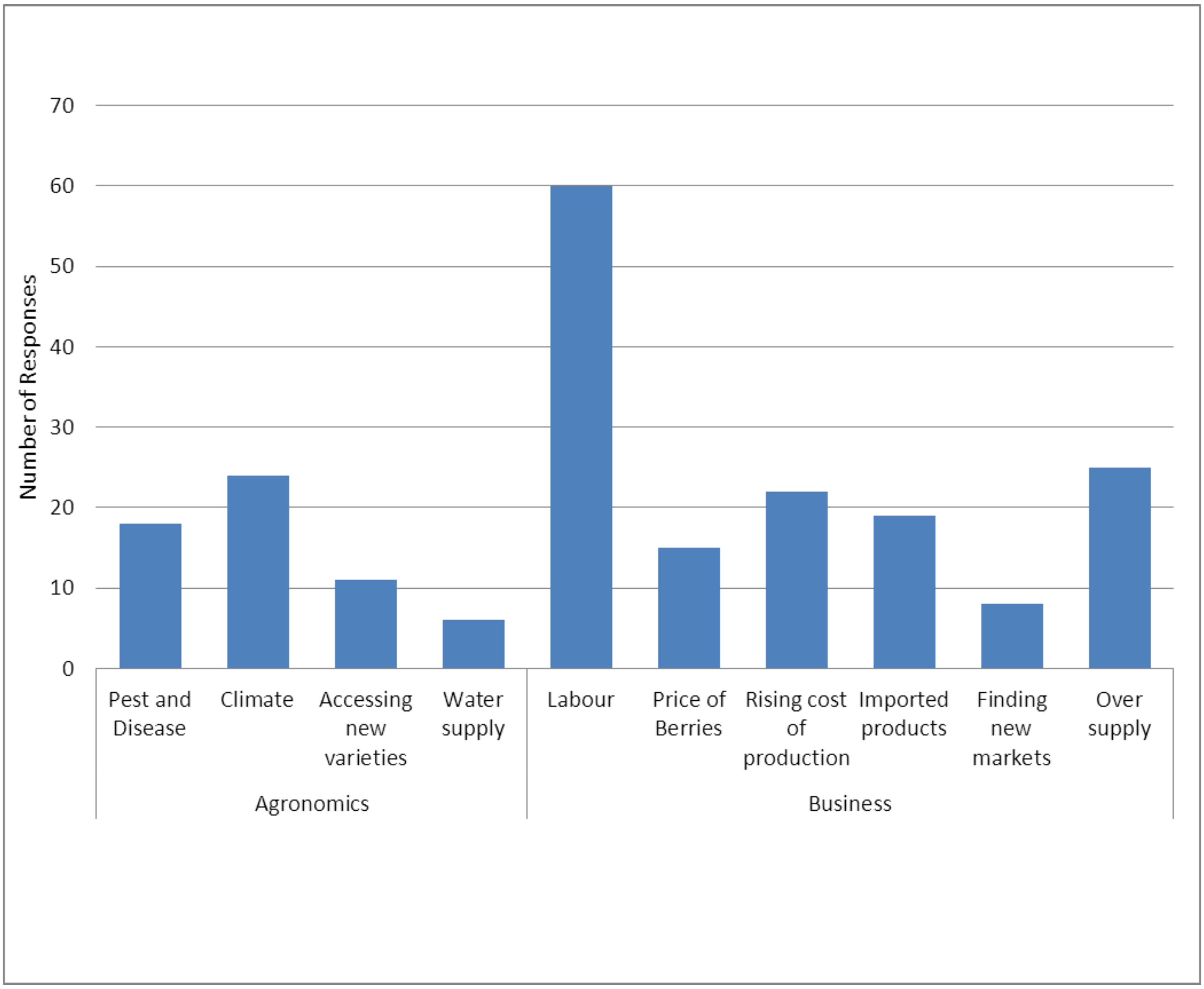
When looking at the rating average of issues affecting blueberry producers; labour costs, disease and insect management and technical information are standout priority issues followed by obtaining suitable varieties and communications within the industry. Lower priority issues include imported product, chemical permits and registrations, interstate and export market access with levy issues as a clear low priority for respondents. Knowing a grower's priority is crucial in understanding where the IDO and R&D teams can have the greatest impact.

Question 16

What three key issues are limitations to your continued profitability?

This question required a written response, where respondents could list any issue that they perceived to limit their continued profitability. The responses were grouped into two main categories: Agronomics and Business issues and these cover 77% of the responses from growers, the other 23% were miscellaneous and have been excluded from the graph.

Figure 18: Key issues limiting continued profitability for blueberry producers

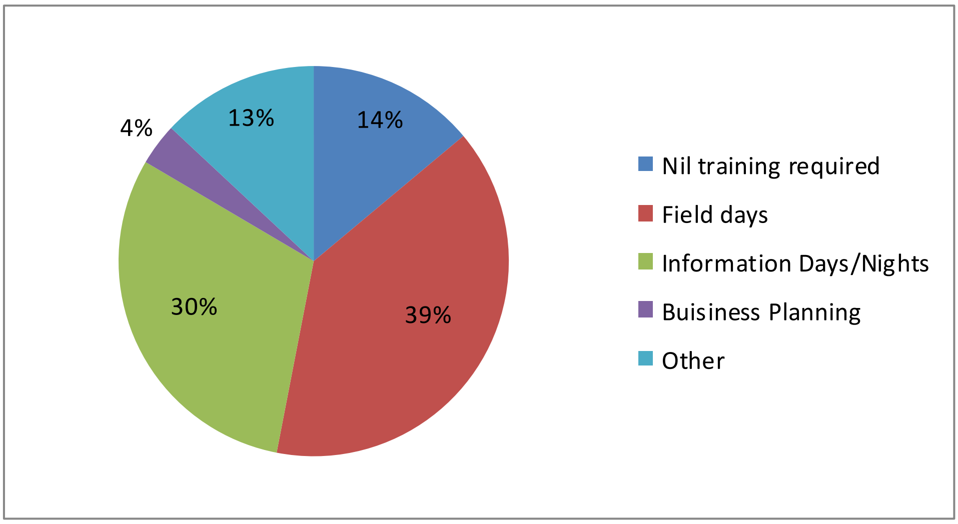


From the graph it is evident that the standout issue for respondents are labour costs and/or finding skilled labour; this information complements the findings from question 15. Other key issues limiting continued profitability include finding new markets, climate conditions and the rising cost of production.

Question 17

How do you like to receive information and build your skills (e.g. field days, information days, business planning)?

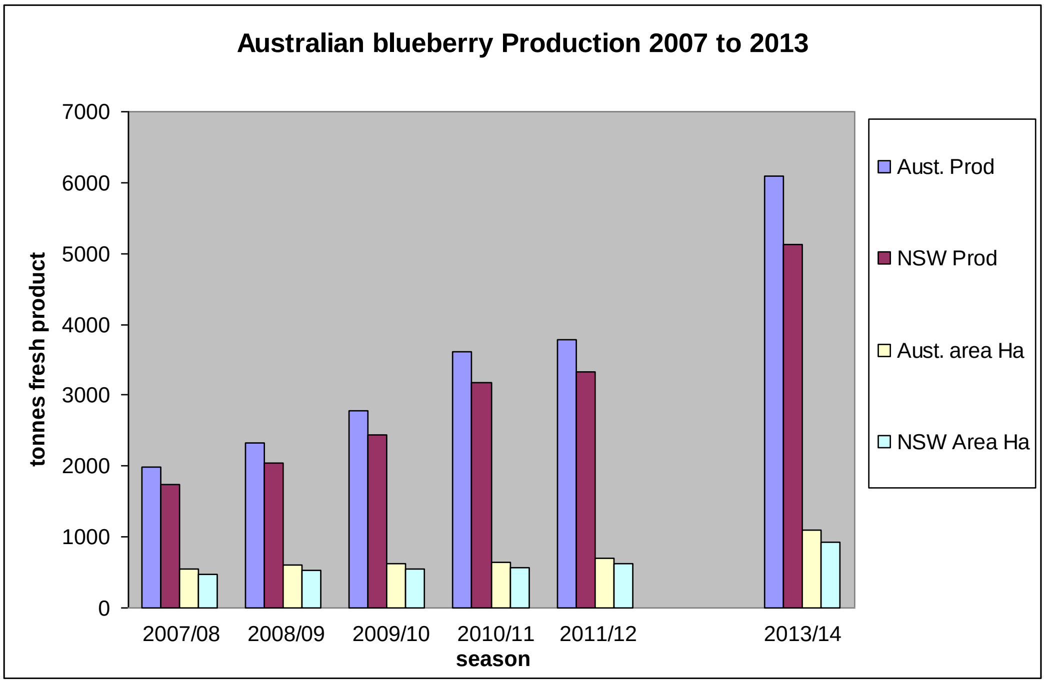
Figure 19: How blueberry growers prefer to receive information



It is apparent in the graph above that a large proportion of respondents listed field days and information nights as their preferred method of receiving information and building skills. It is also important to note that a high number of people requested the two together. A surprising 14% said that nil training was required and few people thought they needed business planning training. A number of people gave answers on specific information and field days that they would like; some of these included information on pest and disease management and field days looking at different varieties.

Australian Blueberry Production

Figure 20: Australian Blueberry Production 2007 to 2013



It is evident from the graph above that Australian fresh blueberry production has increased from around 2000 tonnes in 2007 to 6100 tonnes in 2013, meaning it has tripled in 7 years. The Australian area planted with blueberries has doubled from 2007 where there were approx. 500 hectares planted to 1000 hectares in 2013. Many varieties have been replanted in the same areas and newer varieties that are being planted may be higher yielding; this may explain the quicker rise in volume of fresh fruit being produced than the rise in planting area. New South Wales has followed and probably led this trend.

Table 3: Australian blueberry production statistics from 2007 to 2014

Year	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	**12/13**	**13/14**
Volume(t)	1984	2330	2775	3615	3780	na	6100
Area (ha)	545	600	625	650	700	na	1100
Fresh Domestic(t)	1090	1360	1640	2320	2410	na	5550
Fresh export(t)	450	320	270	320	320	na	320
Processed(t)	360	450	550	450	450	na	450
High Chill	17%	25%	30%	33%	35%	na	30
Low chill	83%	75%	70%	67%	65%	na	70
Farm Gate Value$/kg							
Fresh$/kg	20.9	21.24	21.55	18.98	19.65	na	20
Processed $/kg	5.76	5.45	3.95	3.03	3.83	na	3.50

Total value of Australian industry $M	**32.1**	**35.68**	**41.1**	**50.7**	**53.69**	**82** (ABS fig)**	**122.18**

Assumptions

1. $28 /tray average over the season ($60 to $25) FGV $122M
2. Retail value $4.00/punnet $190M
3. Production 2013/2014 season 6100 tonnes
4. 1.5kg Tray number 4 million

Australian blueberry statistics summary data from survey

Key facts

1. Total FGV for the industry in 2013/14 season was $122 M nationally(fresh picked product)
2. Total production area in 2013/14 was 1100 ha
3. Another 500 ha has been planted but not yet producing a crop in 2013
4. Blueberry growers will be expanding around 500 hectares in the next 5 years.
5. Total production volume in 2013/14 was 6100 tonnes.
6. NSW is the largest producer with 84% of Australian production.
7. 95% is consumed domestically
8. Consumption of fresh blueberries is 254g per person per year
9. Consumption of fresh plus processed blueberries is 363 g per person per year
10. The key issues affecting blueberry producers are labour costs and insect and disease management.
11. 67.5% of growers receive their information for best management practices in blueberry production via the ABGA journal and newsletters.
12. 93% of blueberry growers are a member of the ABGA.

Blueberry Supply Chain

Locally produced and imported frozen and fresh berries enter local retail and food service channels for distribution. The majority of imported product is frozen pulped or processed and totals around 817 tonnes.

Extension

Project BB13000 “Understanding demographic of the Australian Blueberry industry” will provide baseline date for the industry on crop varieties, plant numbers, volumes and future plantings for all states. This information is an invaluable resource for the blueberry industry in terms of future trends, planning and for the development of a new industry strategic plan in 2014.

A survey was developed with input from consultation with the blueberry industry. This survey has been distributed electronically to all blueberry grower members and other non-members outside the association. Most of the larger production growers are members of the Australian Blueberry Growers Association (ABGA) and are on its membership list. They account for approximately 95% of the berries produced in Australia. There are however a number of growers in Qld and NSW that are non-members of the association with which we have very little contact. These non-member growers form a small but relevant portion of the industry. It is critical to gather their statistics in terms of knowing their current and future production, collection of levies and in marketing a quality product.

Once the surveys had been completed and the data was compiled an article for the ABGA journal was published (see appendix A) and a press release was written (appendix B) and distributed to a number of media outlets relating to the growth of the blueberry industry. This communication strategy has resulted in a number of media interviews. SBS TV had conducted an interview with a number of major growers and packers and this was presented on prime time TV during the 7.00pm news on 28th July 2014. ABC north coast radio presented this information and the story also went to NSW ABC country hour on 27th June 2014. In addition to this, these stories have been widely viewed across many social media platforms. An article released in the Daily Telegraph as well as the links to the above media stories can be seen in Appendix C

A PowerPoint presentation (Appendix D) was delivered to the Australian Blueberry Growers’ Association (ABGA) annual general meeting (AGM) with all the results of the survey on the 11th November 2014 at Coffs Harbour.

A copy of the final report will be uploaded on the Australian Blueberry Growers Association (ABGA) website so that all members will be able to view and read the final report.

A webinar on the demographic survey and its findings will be held in the future, this will allow key industry bodies and growers to tune in and receive a snap shot of the industry and its future needs. The webinar will be recorded and placed on the ABGA website to be viewed by members at their leisure and on the Department of Primary Industries (DPI) website to be available to non ABGA members.

Recommendations

The survey provided a clear snapshot picture of the 2013/14 season in relation to the size and expected growth of the blueberry industry in the next 4 years.

In 2013/14 season, 1100 hectares of blueberries Australia wide produced berries with a further 498 hectares already planted which will come into full production over the next 5 years.
Due to this growth it is recommended that Australian blueberry industry continues to work hard and provides sufficient funding to access further export markets. This will help to take the pressure off the domestic marketing by continuing to maintain good returns to growers.

It is also important that this information is used to help set the direction of a new strategic investment plan for 2015-2019. The new plan should be used to guide this growth by providing a framework for R&D investment by the industry. This plan will focus research and help to improve the uptake and the adoption of sustainable production systems. This will provide information for the implementation of best management practices that will ensure the future sustainability of the industry.

Due to the relatively young demographic of many blueberry growers and the fact that over half of these growers have been growing blueberries less than 10 years, it is recommended that the ABGA provides support to younger or new growers by providing suitable networking, mentoring and training activities. It is further recommended that this is targeted at Queensland, Tasmania and Western Australia specifically to ensure that information, field days and learning opportunities are provided in these regions due to the rapid growth of blueberry plantings.

Southern Highbush is by far the most commonly grown variety and therefore it is important and recommended that the majority of research and development work should aim at improving crop production and quality for this variety in order to benefit majority of growers. This will further help to even out prices and stimulate regular purchases over the total season by providing a quality product to consumers throughout the year.

Over 90% of blueberry growers are ABGA members and a large proportion of these growers receive their information for best management practices through ABGA journals and newsletters. From this data it is clear that the ABGA is an excellent means of disseminating information among growers and should continue to be used as an information provider.
It is recommended that a regular survey similar to this should be undertaken by the industry at least every two years to support and understand the industry position when attempting to deal with government agencies. This could be facilitated by the Industry Development Officer who is well known to the industry by including it into his work plan.

According to the survey, the key issues affecting blueberry producer’s profitability are labour costs/finding skilled labour, disease and insect management, technical information and obtaining suitable varieties for particular regions. Based on this survey it is recommended that research and development aim at improving these areas to further develop the Australian blueberry industry.

The majority of respondents listed that they like to receive information and build their skills through field days and information nights; it is therefore recommended that outcomes from new research and other developments include these as a means of information delivery to growers.

Appendices

Appendix A: Survey Questions – Page 1

Blueberry Industry Survey

Purpose of this survey

This survey has been created for the Australian Blueberry Growers Association to gain a better understanding of the demographics of Australian blueberry growers; both members of the association and non-members. From the information gathered, the association aims to update the communications process to meet the specific needs of the grower base and to ultimately improve productivity and growing practices.

The Australian Blueberry Growers Association has been instrumental in the significant expansion of the Australian blueberry industry and a focal point for information for blueberry growers and potential ABGA members. It is vital that the association understands all aspects of the blueberry industry in order to gather and distribute information relevant to growers in order to implement uniformity and consistency across the whole industry in all aspects of blueberry production and marketing.

Association funding is currently derived from a voluntary levy scheme. A voluntary levy provides funds to achieve the objectives of the industry such as research, development and marketing. Industry demographics collected from this survey will inform the association on the efficiency of this levy.

Ethics

Voluntary participation in this survey demonstrates your consent to the information provided being used for honest and ethical research. The communication of results will provide the confidentiality of participants with survey information to be used solely by the Australian Blueberry Growers Association and will not be passed onto third parties.

IMPORTANT

THIS SURVEY CONSISTS OF 4 OR 5 PAGES AND 22 OR 24 QUESTIONS, PLEASE ENSURE TO PRESS [NEXT] TO MOVE TO THE NEXT PAGE TO FULLY COMPLETE THE SURVEY.

If you are not sure of your answers, please provide your best estimate.

You can come back to the survey at a later stage by using the same link provided in your email.

If you have problems completing this survey email me at phillip.wilk@dpi.nsw.gov.au.

Thank you.

1. What is the age of the primary person running the farm? (Circle one.)

- ◯ 18-35
- ◯ 36-55
- ◯ 56-65
- ◯ Over 65

2. How many years have you been growing blueberries?

- ◯ Less than 5 years
- ◯ 5 to 10
- ◯ 10 to 20
- ◯ Greater than 20 years

Page 1

Appendix B: Exert from ABGA Spring 2014 Journal

Demographic of the Blueberry Industry BB13000

This Horticulture Australia Limited (HAL) and ABGA supported survey was commissioned to collect the most current production and planting data for the Australian Blueberry industry in the 2013/14 season.

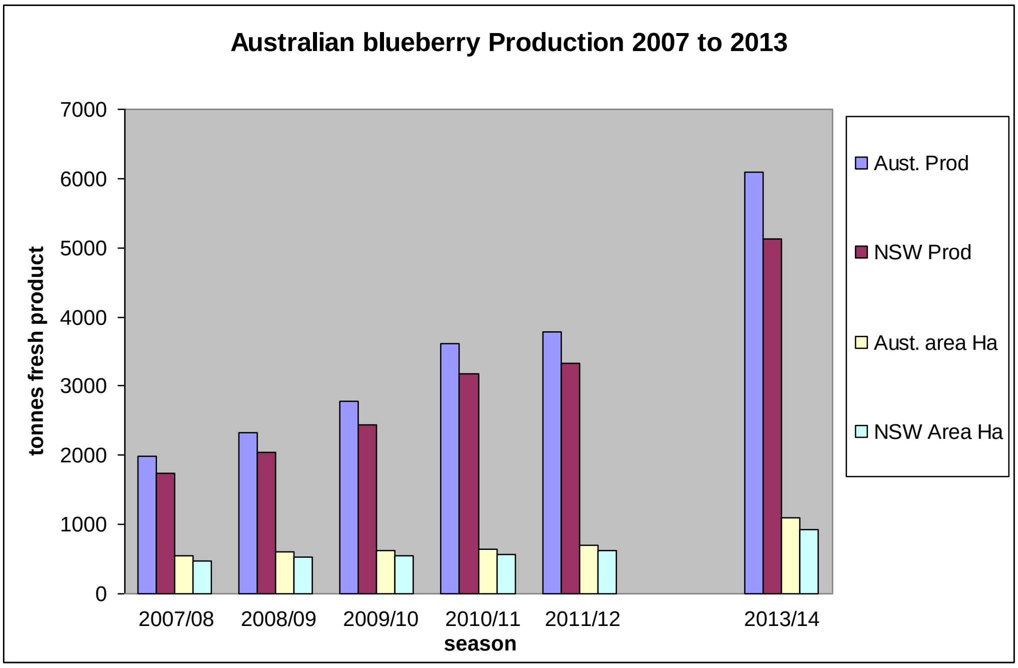
Growth in the industry was hardly surprising as there has been a rapid expansion both in the northern of NSW, Queensland and in Tasmania.

The information was collected by the industry development officer in a number of ways both by electronic survey and telephone. The information supplied by individuals and businesses is strictly confidential and will only appear as a combined summary.
It was pleasing that the total response rate from individual businesses for the industry was over 86% and the total volumes of production and plantings captured for the industry was well over 95%. The information collected also included large businesses that are non ABGA members and or non levy payers.

It is estimated from these figures that approximately one million, 1.5kg trays are being marketed through various agents that does not have levies deducted. At a modest $25/tray this equates to approximately $25M gross returns or 20% of total industry value going to blueberry growers who are non levy payers.

The total value of the Australian blueberry industry in the 2013/14 season was $122-$125 million. Total production has gone from (Fig 1) 2000 tonnes in 2007 to over 6000 tonnes in 2013.

Fig 1 Australian blueberry production



Appendix C: Media release

Department of Primary Industries

Media Release

Thursday 26 June 2014

Skyrocketing blueberry production a boom for NSW economy

Blueberry production is proving to be the growth agricultural industry of the last decade with the value of the NSW blueberry crop skyrocketing four-fold in the last six years and up 68 per cent in the last 12 months.

Department of Primary Industries (DPI) Blueberry Development Officer Phillip Wilk said the farm-gate value of blueberry production in NSW alone now tops just over $100m a year – and is set to increase further based on planning underway for new orchards.

"The area under blueberry production in Australia has more than doubled since 2007 to 1100 hectares based on the market demand for healthy blueberries, newer varieties and improved production techniques.

"About 84% of the national crop is grown in NSW, most of it on the north coast, followed by Tasmania with 6%, Queensland with 5% and Victoria with 4%."

Mr Wilk, who has just completed a comprehensive survey of growers nationally, said the Mid North Coast around Coffs Harbour, from Corindi to Bonville, has seen the bulk of the new production.

"Many former banana growers in the region have switched to blueberries and greenhouse vegetable production.

"This greenhouse vegetable production enables the blueberry growers to retain labour in the off-season – and it alone represents at least an extra $20 million in growth for the region."

Mr Wilk said growing blueberries required a major investment in infrastructure such as irrigation and netting on top of the land purchase.

"It is a capital and labour intensive industry but the investment is paying off for good managers due to the domestic and global demand for blueberries.

"The community benefits are also evident with orchards and the downstream packing and processing businesses providing jobs and income for service industries on the Mid North Coast "

DPI Leader Horticulture Development Myles Parker said the DPI had been closely involved with the blueberry industry over the past decade by providing continuing research and industry development support.

"Some major issues DPI researchers are working on include pest and disease management, overseas and interstate market access, improving taste and quality, Queensland fruit fly management and education.

"Access to export markets in South Korea, Taiwan and China is a critical next step for the industry's continued growth and in maintaining domestic prices throughout the season.

"Strong demand from many of our Asian neighbours is due to their trust in our clean, green production image."

Media contact: Phil Bevan 0429 458 053

Follow us: http://twitter.com/#!/nswdpi

Appendix D: Insert from the Daily Telegraph and links to media stories

iSENTIA
INFLUENCE • INFORM • INSIGHT

Daily Telegraph, Sydney
26 Jun 2014, by Samantha Townsend

General News, page 20 - 304.00 cm²
Capital City Daily - circulation 293,512 (MTWTFS-)

ID277293115

PAGE 1 of 1

back

DISCOVER A BERRY TREASURE

Ben Spencer digs into a huge stack of blueberry pancakes. Picture: Nathan Edwards

SAMANTHA TOWNSEND
REGIONAL REPORTER

THEY are the tiny berry which pack an enormous punch.

Consumers are gorging on more blueberries than ever with production increasing 68 per cent in the past 12 months, taking the farm gate value to just over $100 million in NSW alone.

A survey of the industry has found Australians consume on average two punnets a year.

Blueberry production is around 6000 tonnes compared to 1000 tonnes a decade ago.

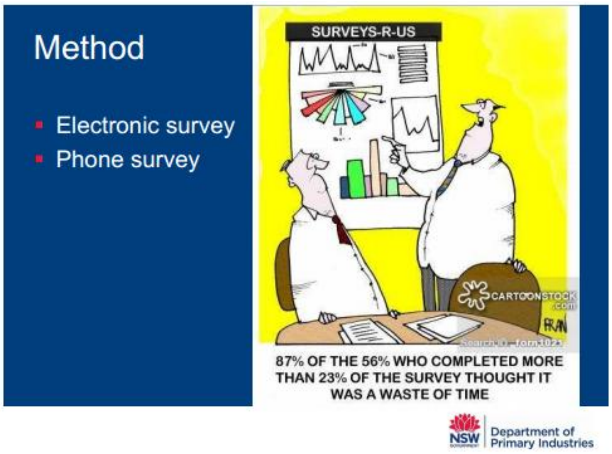
The bite-sized fruit isn't cheap, especially during the peak season from July to January where punnets fetch as much as $9 because each fruit is hand-picked.

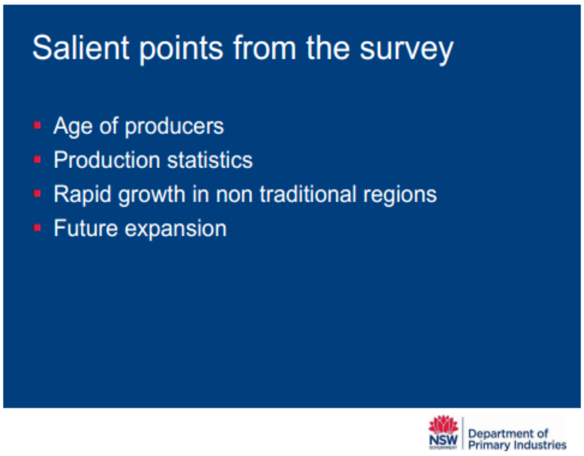
Parents like mother-of-three Sarah Spencer said the fruit is an easy snack to pack.

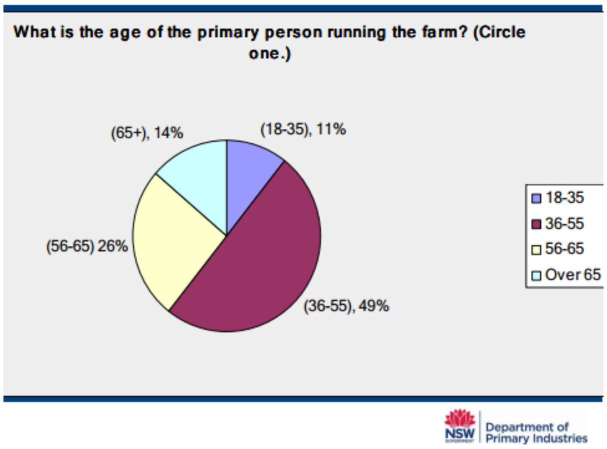
"My two oldest boys would eat them for every meal if they could but in winter we are not buying them as much because they are expensive. In summer we go through three punnets a week," Mrs Spencer said.

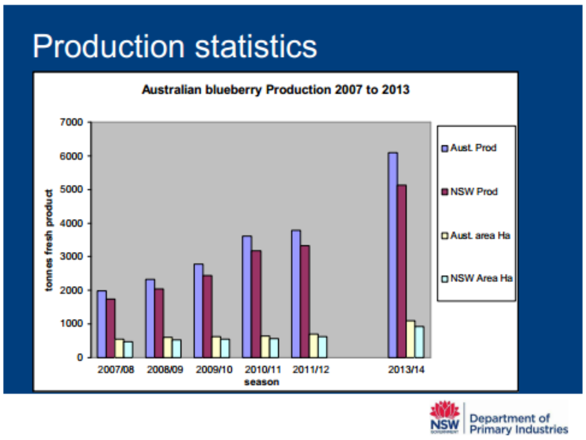
Department of Primary Industries blueberry development officer Phillip Wilk said it was a huge growth industry, with about 84 per cent of the national crop grown in NSW, mostly in Coffs Harbour.

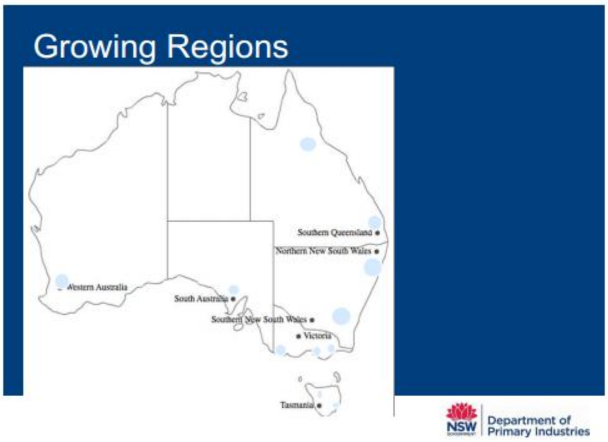
Appendix E: Annual blueberry growers meeting presentation slides

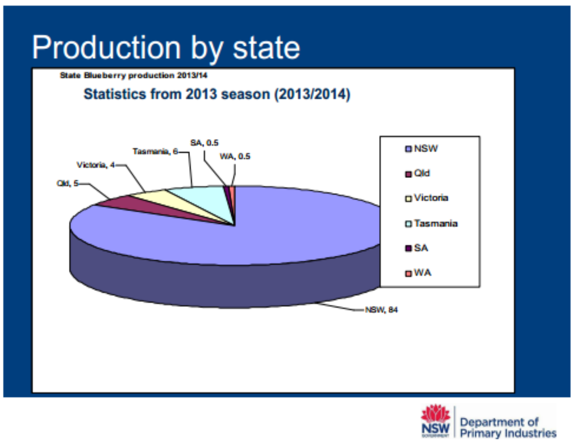












Production area increase in blueberry planting by states (hectares) (young plants 1-4 year old already planted in the 2013/14 season)

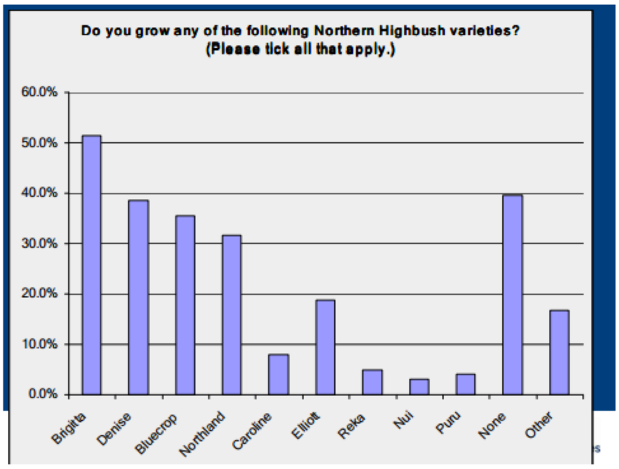
	NSW	Qld	Vic	Tas	WA	SA	total
Hectares	256	90	30	60	60	2	498
Percent of total	57%	20%	7%	13.4%	13.4 %	1%	%100
Fruit production Increase(t)	1792	315.0	480.0	960.0	960.0	32.0	4530

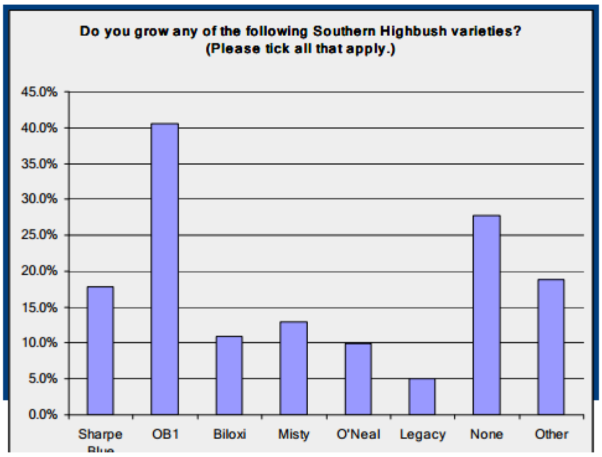
Department of Primary Industries

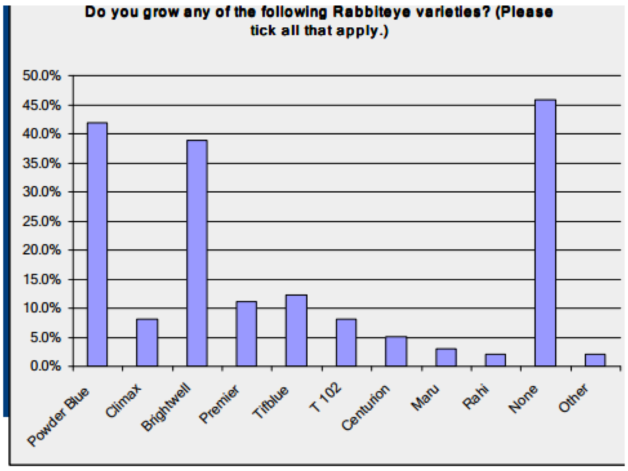
Australian Blueberry Production

Year	07/08	08/09	09/10	10/11	11/12	12/13	13/14
Volume(t)	1984	2330	2775	3615	3780	na	6100
Area (ha)	545	600	625	650	700	na	1100
Fresh Domestic(t)	1090	1360	1640	2320	2410	na	5550
Fresh export(t)	450	320	270	320	320	na	320
Processed(t)	360	450	550	450	450	na	450
High Chill	17%	25%	30%	33%	35%	na	30
Low chill	83%	75%	70%	67%	65%	na	70
Farm Gate Value$/kg							
Fresh$/kg	20.9	21.24	21.55	18.98	19.65	na	20
Processed $/kg	5.76	5.45	3.95	3.03	3.83	na	3.50
Total value of Australian industry $M	32.1	35.68	41.1	50.7	53.69	82** (ABS fig)	122.18

Department of Primary Industries







Conclusions and recommendations

- An industry survey should be done at least every 2 years and could be part of the IDO project
- Our fantastic group of younger blueberry producers need to be mentored and encouraged
- We are now aware of the 50% increase in production over the next 4 years so how are we planning to manage this?
- We need to capture statistical information from non ABGA members and/or non levy payers as these can be significant?

Department of Primary Industries

Acknowledgments

- ABGA committee
- HIAL
- Sabrina Pitt from *Workwiser* Pty Ltd
- Growers for their patience

Department of Primary Industries