

# Table Grape Fund

## Annual Investment Plan

2020/21



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### 1: Industry background

The table grape industry is a large and significant fruit industry. The industry has experienced significant growth in recent years primarily driven by growing export demand. Table grapes are produced throughout Australia, although Victoria accounts for 71% of production around the major growing regions of Sunraysia and the Murray Valley.

**Table 1:** Table grape industry metric relative comparison

2018/19	Table grapes	Total fruit	Total horticulture
Production value (\$m)	\$693.2	\$5,525.3	14,366.9
5-year average annual value growth (%)	10.9%	6.7%	5.6%
Production volume (t)	208,276	2,793	6,731,638
5-year average annual volume growth (%)	4.9%	2.9%	2.4%
Export share of production volume (%)	70.1%	17.1%	12.3%

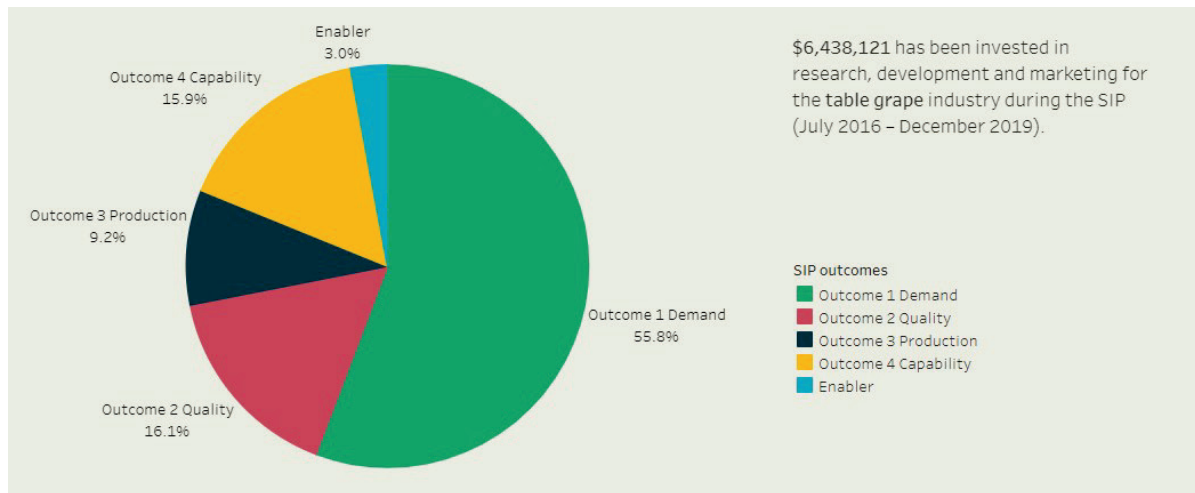
**Table 1** shows that table grape production volume and value has experienced significant growth over the past 5 years. Value growth at a greater rate than volume growth signifies growing unit price as well. Export share of production volume is 70.1%, significantly greater than total fruit.

### Strategic Investment Plan

The table grape Strategic Investment Plan (SIP) identifies the desired 'end of plan' outcomes for the industry as a result of investment into R&D and marketing. Every investment undertaken within the Table Grape Fund must be aligned with at least one outcome area. The outcomes, and corresponding strategies proposed which may contribute to supporting the outcomes are identified in **Table 2** below.

<b>Outcome 1 Demand</b>	Increased demand for Australian table grapes by strengthening and developing domestic and export market opportunities that will improve industry viability and sustainability
<b>Outcome 2 Quality</b>	Demand-building strategies and increased prices for Australian table grapes supported by improvements in product quality
<b>Outcome 3 Production</b>	Production efficiency improved and biosecurity threats mitigated by growers applying knowledge, skills and tools
<b>Outcome 4 Capability</b>	Improved capability across the industry to implement improvements in supply and quality

Over the term of the SIP (July 2016 – December 2019), the industry has invested \$6.4 million in R&D and marketing investments. Over half of this has been invested in Demand (Outcome 1) activities, with approximately 15% invested in each of Quality (Outcome 2) and Capability (Outcome 4). The balance of 9% has been invested in Production (Outcome 3).



While the expenditure analysis identifies how expenditure has been allocated, it should be noted that no 'target' expenditure shares have been set for the table grape industry. Investment prioritisation is informed by a wider range of considerations including:

- Capacity to affect change for intended audience – who will benefit?
- How feasible is delivery of the solution?
- Will the solution delivery value to levy payers?
- Why has the issue not been addressed prior?
- Existing vs emerging industry priority (how critical is the issue)?
- Industry capacity and adoption pathway.

The impact assessment will provide consideration for the above for determining the likely impacts and prioritisation of the investment.

### Industry consultation

In developing the Table Grape Fund's Annual Investment Plan 2020/21 (AIP), Hort Innovation sought to pre-engage with industry to seek input into the priorities for investment in FY20/21. Priorities for investment are initially identified through the review of the industry SIP, current investment program, previous Strategic Investment Advisory Panel (SIAP) discussions and emerging industry opportunities. An open invitation to table grape growers across Australia to provide their thoughts and input into the levy-funded investments for FY20/21 was sent out using various newsletters, direct emails to growers to join an online videoconference/Zoom meeting. A snapshot of the pre-consultation undertaken with the table grape industry has been captured below:

- Hort Innovation Extension & Adoption Team contacted individual growers to provide their input on investment priorities
- Australian Table Grape Association ATGA regional representatives (Zoom Meeting) on 22 June 2020.

## 2: Current investments

Funding source	Project code	Project title	Project summary links
<b>Outcome 1 – Demand</b>			
Strategy 1 – Export markets			
R&D Levy	AM16007	Asia Fruit Logistica 2017	Link available shortly.
R&D Levy	AM17001	Developing a national systems approach for meeting biosecurity requirements to access key Asian markets	<a href="#">Link</a>
R&D Levy	AM17010	Trade Shows - Asia fruit logistica, FVF, foodex	Link available shortly.
R&D Levy	FF18003	Port Augusta QFLY SIT factory pilot operation (SITplus)	<a href="#">Link</a>
R&D Levy	MT13059	SITplus: Developing and optimising production of a male-only, temperature-sensitive-lethal, strain of Qfly, B. tryoni	<a href="#">Link</a>
R&D Levy	MT14052	Essential market access data packages	Link available shortly.
R&D Levy	MT17008	Gulfood trade show 2018 -Dubai - taste Australia attendance	Link available shortly.
R&D Levy	MT17009	Foodex Tokyo trade show 2018 - taste Australia attendance	Link available shortly.
R&D Levy	MT17011	China fruit & veg fair 2017 - taste Australia attendance	Link available shortly.
R&D Levy	MT18017	Taste Australia retail R&D program (AM17004)	Link
R&D Levy	TG11013	Cold disinfestation verification trials for table grape access	Link available shortly.
R&D Levy	TG17000	Table grape export readiness and market access	<a href="#">Link</a>
R&D Levy	TG18001	Building capacity in area wide integrated pest management for Qfly in table grapes	<a href="#">Link</a>
R&D Levy	TG18002	Area wide integrated pest management support for Qfly in table grapes	<a href="#">Link</a>
R&D Levy	TG18003	Cold disinfestation verification trials for table grapes (Taiwan)	<a href="#">Link</a>
<b>Outcome 2 – Quality</b>			
Strategy 2 – New Varieties			
R&D Levy	MT15026	Evaluation of dried and table grape varieties	<a href="#">Link</a>
R&D Levy	MT18005	Improving plant industry access to new genetics (Next Gen sequencing)	<a href="#">Link</a>
R&D Levy	TG17002	Table Grape Supply Chain Quality	<a href="#">Link</a>
<b>Outcome 3 – Production</b>			
Strategy 1 – Productivity R&D			
R&D Levy	MT17007 / TG16000	Minor Use Coordinator / Minor Use Permits	<a href="#">Link</a>
R&D Levy	ST16008	AgVet Collaborative Forum for Plant Industries	Link available shortly.
Strategy 2 – Biosecurity risks			



R&D Levy	MT17005	Improving the biosecurity preparedness of Australian horticulture for the exotic spotted wing drosophila (drosophila suzukii)	<a href="#">Link</a>
R&D Levy	MT17006	Improving Australia hort sector to the threat potentially posed by xylella fastidiosa	<a href="#">Link</a>
R&D Levy	ST18003	PBRI Symposium	Link available shortly.
R&D Levy	TG18000	Review of the Biosecurity Plan and Manual for the Viticulture Industry	<a href="#">Link</a>
<b>Strategy 3 – Market research</b>			
R&D Levy	MT16010	Horticulture Trade Data 2017-2019	Link available shortly.
R&D Levy	MT19005	Horticulture Trade Data 2017-2019	Link available shortly.
<b>Outcome 4 – Capability</b>			
<b>Strategy 1 – Industry capacity</b>			
R&D Levy	MT17015	Consumer behavioural and retail data for fresh produce	<a href="#">Link</a>
<b>Enabler</b>			
R&D Levy	TG17910/	Grower advice and consultation and preprocurement expenses	Link available shortly.
R&D Levy	MT18003	Industry annual reports 2017-2018	Link available shortly.
R&D Levy	MT18009	Industry specific impact assessment	Link available shortly.
R&D Levy	MT18011	Across horticulture impact assessment	<a href="#">Link</a>
R&D Levy	TG19005	Independent M&E planning and mid term evaluation of TG19000	Link available shortly.
<b>TBC</b>			
R&D Levy	TG19002	Table grape export strategy	Link available shortly.
R&D Levy	ST19017 / MT19004	Biosecurity Preparedness through developing capacity for in-field detection of spotted wing drosophila	Link available shortly.
R&D Levy	ST19018	Mitigating the potential spread of xylella fastidiosa (Xf) by understanding vectors	<a href="#">Link</a>
R&D Levy	TG19000	Extension of technologies and best management practice to the Australian table grape Industry	<a href="#">Link</a>
R&D Levy	TG19001	Trapping in table grape vineyards for AWM of Q'fly that supports market access	<a href="#">Link</a>
R&D Levy	TG19003	Table grape quality and consumer attitudes	Link available shortly.
R&D Levy	TG19004	Minimum maturity standards adoption across the table grape supply chain	Link available shortly.
R&D Levy	MT19003	Parasitoids for the management of fruit flies	Link
R&D Levy	MT19006	Across industry MRL compliance	Link available shortly.

### 3: New investments

The Table Grape Fund's Annual Investment Plan 2020/21 (AIP) was presented to the table grape SIAP on 25 August 2020 and the following investments were considered.

**The Table Grape R&D and Marketing Funds are in a strong position, with significant funds available for further project expenditure.**

Please note, wherever possible investments will be aligned to form multi-industry projects, all investments are subject to funding availability and will progressed in order of priority. If investments do not occur in this financial year, then they will be reconsidered and reprioritised for the 2021/22 AIP.

#### Supported investments

Outcome	Strategy	Project title	Description	Funding source
1	2	Domestic Marketing Program FY21	The domestic marketing program includes activities such as: <ul style="list-style-type: none"> <li>• Media opportunities</li> <li>• Content capture/creation</li> <li>• Australian table grapes consumer marketing campaign</li> </ul>	MK levy
1	1	International Marketing Program FY21	Export marketing carried out through the Taste Australia program includes activities such as social media partnerships, advertising, retail engagement and e-commerce in key export markets.	MK levy
1	1	Market Access & Trade Development	Most exporting industries either new, emerging or mature have a 'bare-essentials' through to a comprehensive export market project in place. These projects are designed to guide the industry's ongoing export strategy, market access, trade development and Taste Australia & International Trade programs, whilst providing the tools, capacity and capability activities to capitalise on the opportunities being created.	R&D levy