

Blueberry Annual Investment Plan 2022/23



Industry position

The blueberry industry has continued to be one of the fastest growing and highest value horticultural sectors in Australia with a production value \$411 million and volume growth of 12% in 2020/21. Industry growth has been underpinned by significant and consistent increases in year-round supply from different regions. Blueberry production is focused on the eastern seaboard where 97% of production occurs.

The popularity of fruit for 'snacking' purposes, the classification of blueberries as a 'superfood', and the versatility of berry products suggest domestic and global berry consumption will continue to remain strong. This combined with the high-quality and year-round production of Australian blueberries, suggests the industry outlook will remain positive. Strong growth is expected to continue in the domestic market, coupled with an increasing strategic focus on market growth through the development of export opportunities and initiatives.

The key challenges for the blueberry industry as evidenced by industry's current investments are: increasing demand and understanding consumer behaviors; international trade and export development; and improving production efficiencies through targeted research and development (R&D) and extension.

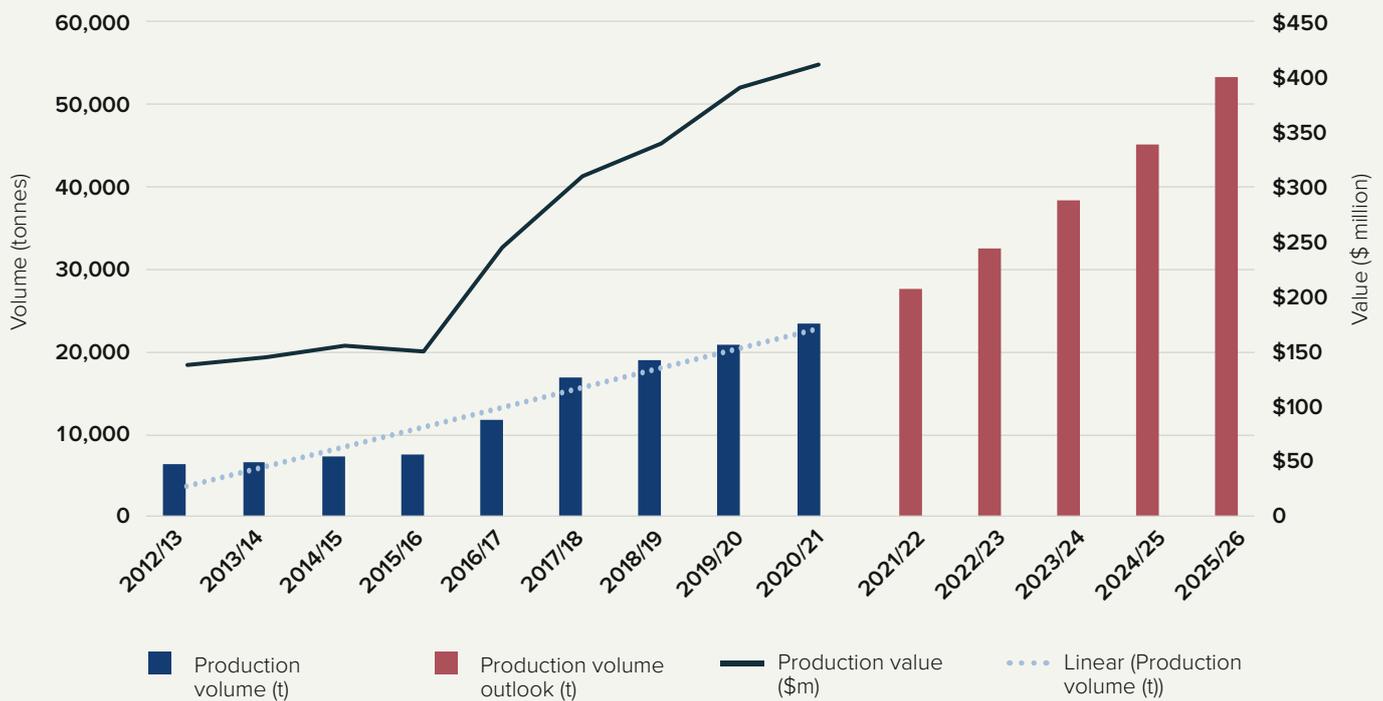
Further background on the blueberry industry and its priorities can be found in the [berry Strategic Investment Plan 2021-2026](#). Further information on industry statistics can be found in the [Australian Horticulture Statistics Handbook 2020/21](#).

The key challenges for the blueberry industry are: driving demand; export; and improving production efficiencies.

Blueberry production

Blueberry industry production volume and value from 2012/13 to 2020/21 and projected production volume to 2025/26 can be seen in **Figure 1**. Future performance has been projected based on the eight-year compound annual growth rate (CAGR) to create a lagging indicator of historical production.

FIGURE 1. BLUEBERRY PRODUCTION 2012/13 TO 2025/26



*Note: the estimated production volume is not an accurate indicator for the value of statutory levies to be received by Hort Innovation.
Source: Australian Horticulture Statistics Handbook for the year ending 30 June 2021 and analysis based on Blueberry Australia’s Production Outlook 2016-2025.*

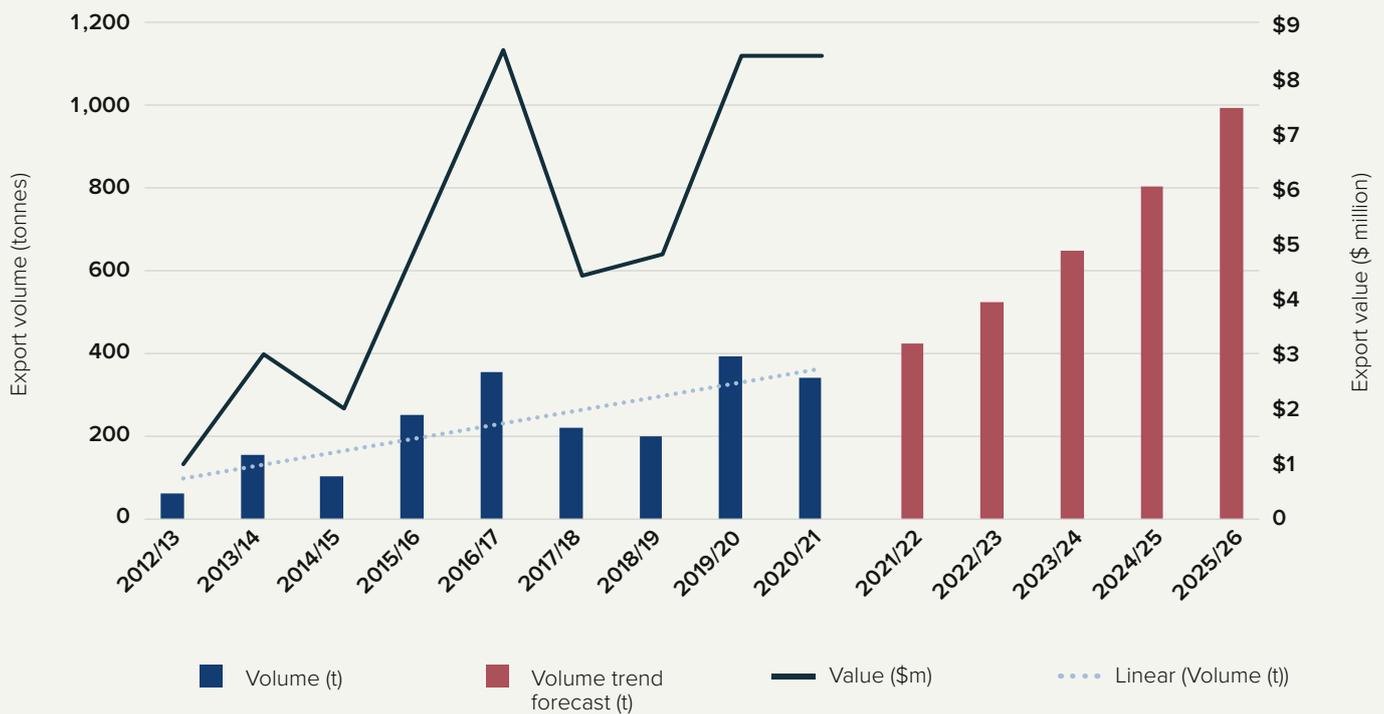
Production trends:

- An estimated 23,452 tonnes of blueberries were produced in 2020/21, valued at \$411.2 million. This an average compound annual growth rate of 18% in production volume and 15% in production value (based on the eight-year CAGR)
- The blueberry industry is one of the fastest-growing horticulture industries with commercial production established in all states.

Blueberry exports

Blueberry volume and export value from 2012/13 to 2025/26, showing expected exports over the next three years of 1,596 tonnes, can be seen in **Figure 2**.

FIGURE 2. BLUEBERRY EXPORTS 2012/13 TO 2025/26



Source: Australian Horticulture Statistics Handbook for the year ending 30 June 2021, with predicted export based on the eight-year compound annual growth rate.

Export trends:

- 342 tonnes of blueberries were exported in 2020/21, with a value of \$8.4 million
- While blueberry exports only account for approximately 1.5% of Australian production, the volume of blueberries entering the export market since 2012/13 has increased by 452% and by 740% in terms of value.

Investment advice and consultation

The blueberry Annual Investment Plan (AIP) 2022/23 was not presented to the blueberry Strategic Investment Advisory Panel (SIAP) (**Table 1**) in 2022 due to limited funding availability for new investments.

TABLE 1. BLUEBERRY SIAP

Name	Organisation
Rachel Mackenzie	Berries Australia
Greg Murdoch	Costa Group
Melinda Simpson	NSW DPI IDO Blueberries
Nicholas Miall	Perfection Fresh Australia
Tyler Scofield	Driscoll's Australia
Kamaldeep Singh Clair	Mountain Blue Farms

The investment process

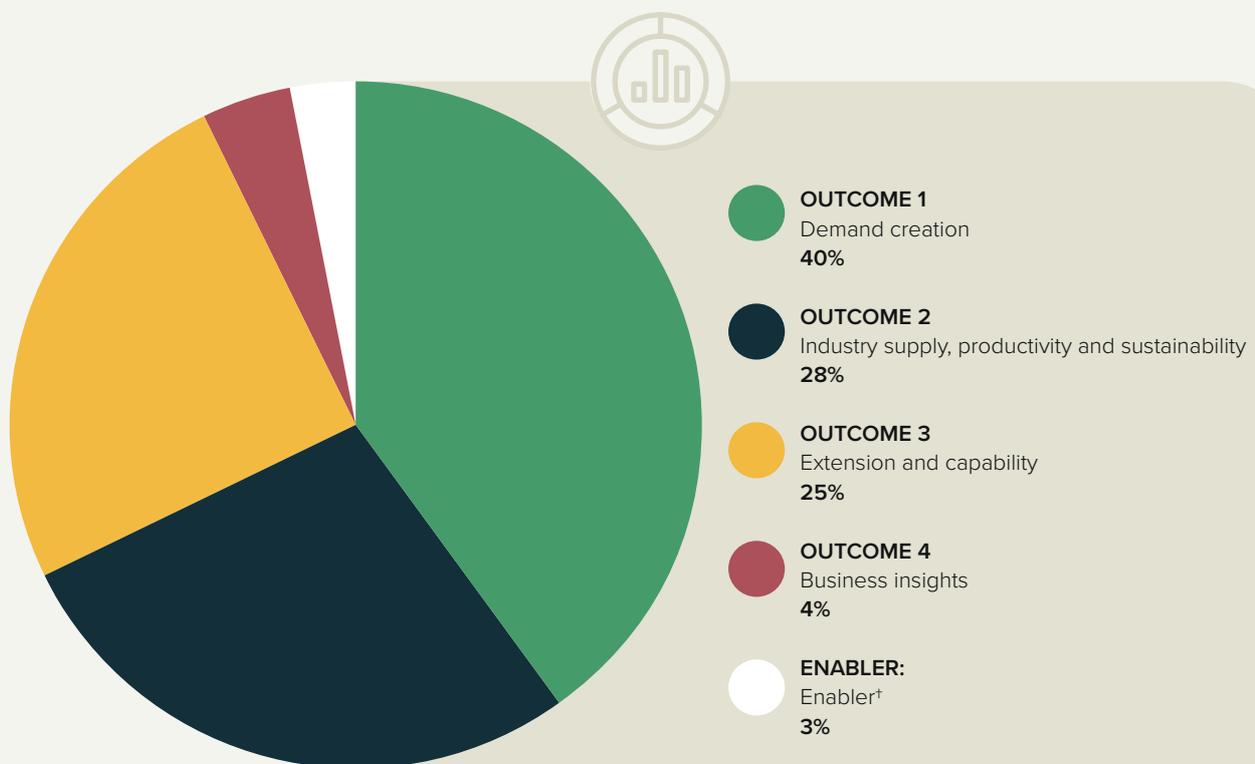
Investments specific to the Blueberry Fund are guided by the industry's SIP and AIP. The SIP provides an overarching roadmap for industry to follow, and the AIP details how levy dollars will be spent each year to achieve industry goals.

Learn about Hort Innovation's investment processes via our website [here](#), or watch a video about how investment decisions are made via the blueberry 'fund management' page on our website [here](#).

Current investments

The blueberry SIP details the industry's strategic goals centered around four outcome areas: protect the production base; market optimisation; communication, extension and capability; and business insights. Under each of those outcomes are industry-specific strategies and key performance indicators (KPIs) that provide guidance on how the blueberry industry will work towards achieving the outcomes. **Figure 3** below identifies forecasted investment expenditure in each of the SIP outcome areas for 2022/23.

FIGURE 3. COMMITTED EXPENDITURE FOR BLUEBERRY SIP INVESTMENTS 2022/23



* Enabler: projects that support the broader delivery of the industry's project investments. Examples of enabler projects include annual reporting and monitoring and evaluation capacity.

Table 2 indicates the current invested projects for 2022/23 that are aligned to the respective outcomes and strategies for the Blueberry Fund. More information is available on the Hort Innovation website for those projects which have a hyperlink (see table below). A full report on the Blueberry Fund can be found in the [blueberry Annual Report 2021/22](#).

TABLE 2. CURRENT INVESTED PROJECTS IN THE BLUEBERRY FUND

Outcome	Strategy	Project code	Project title	Delivery partner	Start date	End date	Life of project value
1. Demand creation	2. Export readiness	MT20004	Joint berry export trade development	Berries Australia	25/5/21	30/4/24	\$341,700
1. Demand creation	1. Consumer demand	MT21000	Health and nutrition information for the berry industry	Nutrition Research Australia	22/2/22	3/2/25	\$172,937
1. Demand creation	3. Market access 2. Export readiness	ST21007	Australian horticulture international demand creation	Kantar Insights Australia	3/6/22	31/3/23	\$9,750
2. Industry supply, productivity and sustainability	2. Integrated pest and disease management 10. Biosecurity	BB19001	Additional cold treatment schedule for Queensland Fruit Fly in blueberries for market access to China	Department of Agriculture and Fisheries, Queensland	20/11/20	30/6/23	\$352,701
2. Industry supply, productivity and sustainability	12. Regulatory Support	BB21000	Blueberry industry minor use program	Hort Innovation	1/7/22	30/6/23	\$13,000
3. Extension and capability	1. Extension capability 2. Engagement 3. Leadership initiatives 4. Barriers to uptake	MT18020	Facilitating the development of the Australian berry industries	Berries Australia	10/10/19	30/9/22	\$355,718
3. Extension and capability	2. Engagement	MT19009	BerryQuest International 2021	Berries Australia	4/6/20	31/10/22	\$20,000
4. Business insights	1. Consumer insights	MT21003	Consumer demand spaces for horticulture	Kantar Insights Australia	17/1/22	15/7/22	\$1,000
4. Business insights	1. Consumer insights	MT21004	Consumer behavioural data program	Nielsen Connect Australia	29/3/22	20/11/26	\$61,000
4. Business insights	3. Production forecasts	MT21007	Seasonal horticulture labour accommodation study	Strategic Project Partners	26/6/22	12/8/22	\$3,674
Enabler [†]	Enabler [†]	BB22910	Grower advice and consultation	Hort Innovation	1/7/22	30/6/23	\$8,750

[†] *Enabler: projects that support the broader delivery of the industry's project investments. Examples of enabler projects include annual reporting and monitoring and evaluation capacity.*

Key for project codes:

Projects starting with BB are funded by the blueberry levy only

Projects starting with MT are funded by multiple industries, including with blueberry levy contribution

Projects starting with ST are strategic co-investment, with blueberry levy contribution

Financial statements

View the current and most up-to-date financial statements for the Blueberry Fund on the [Hort Innovation website](#).

Recommended investments in 2022/23

Although the Blueberry did not make any investments in 2021/22, it has reserves available and the industry strategy is to grow these to invest in a larger project in 2023/24.

SIAP meeting summaries:

A SIAP meeting for the Blueberry Fund was not held in 2022 due to limited funding availability.

Note: Wherever possible, investments will be aligned to form multi-industry projects, and all investments are subject to funding availability. If investments do not occur in this financial year, they will be reconsidered and reprioritised for the blueberry AIP 2023/24.

Find out more information on the Blueberry Fund
at www.horticulture.com.au/blueberry

Hort Innovation Level 7, 141 Walker Street, North Sydney NSW 2060