

Table Grape Fund

Annual Report 2019/20

About Hort Innovation and the Table Grape Fund

Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australia’s horticulture sector. We work closely with industry to invest the table grape R&D and marketing levies, together with Australian Government contributions, into key initiatives for growers, through the Hort Innovation Table Grape Fund. We’re extremely proud of the work we do to help drive productivity, profitability and demand for table grape growers, and for the horticulture sector at large.

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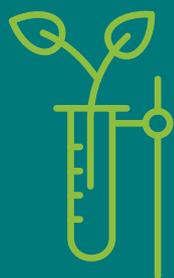
About the year

An intense and unpredictable year, 2019/20 certainly dealt challenges for the world, for Australian horticulture, and for Hort Innovation. There was ongoing drought, a devastating bushfire season, intense floods, the biosecurity threat of fall armyworm and, of course, the global and ongoing COVID-19 pandemic.

We encourage you to download a copy of the overarching Hort Innovation Annual Report 2019/20 at www.horticulture.com.au/annual-report-portal to better understand Hort Innovation’s responses to these events, and how the company was able to change its plans and priorities to best serve the sector.

Through it all, though, activity in the Hort Innovation Table Grape Fund remained strong. While some activities inevitably changed under COVID-19, it was still a solid year of investment. There was some \$1.62 million invested in R&D for the industry – including into several new projects – and close to \$927,000 in marketing. Read on for an overview of what was delivered.

2019/20 Table Grape Fund snapshot



\$1.62M

invested in R&D



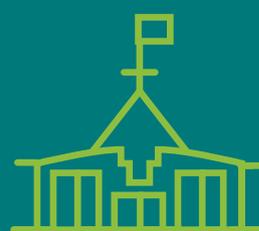
\$927,000

invested in marketing



30

active R&D
investments



\$1.77M

in levies collected
by the government and passed on
to Hort Innovation for investment

Did you know?



10.9%

The Australian table grape industry's production value grew at an average annual rate of 10.9 per cent over the five years to 2018/19



2x

Table grape exports more than doubled in value in recent years, growing from \$227 million in 2013/14 to \$552 million in 2018/19



78%

The majority of Australia's table grapes are grown in Victoria (78 per cent), with smaller amounts grown in New South Wales, Queensland, South Australia and Western Australia

These facts and more can be found in the Australian Horticulture Statistics Handbook, which is delivered by Hort Innovation each year. The handbook is packed with horticulture statistical information and analysis for some 75 categories, for use by individual industries and the wider sector. The 2018/19 edition was released in early 2020 and, for the first time, features an interactive dashboard format for desktop users. See www.horticulture.com.au/horticulture-statistics-handbook.



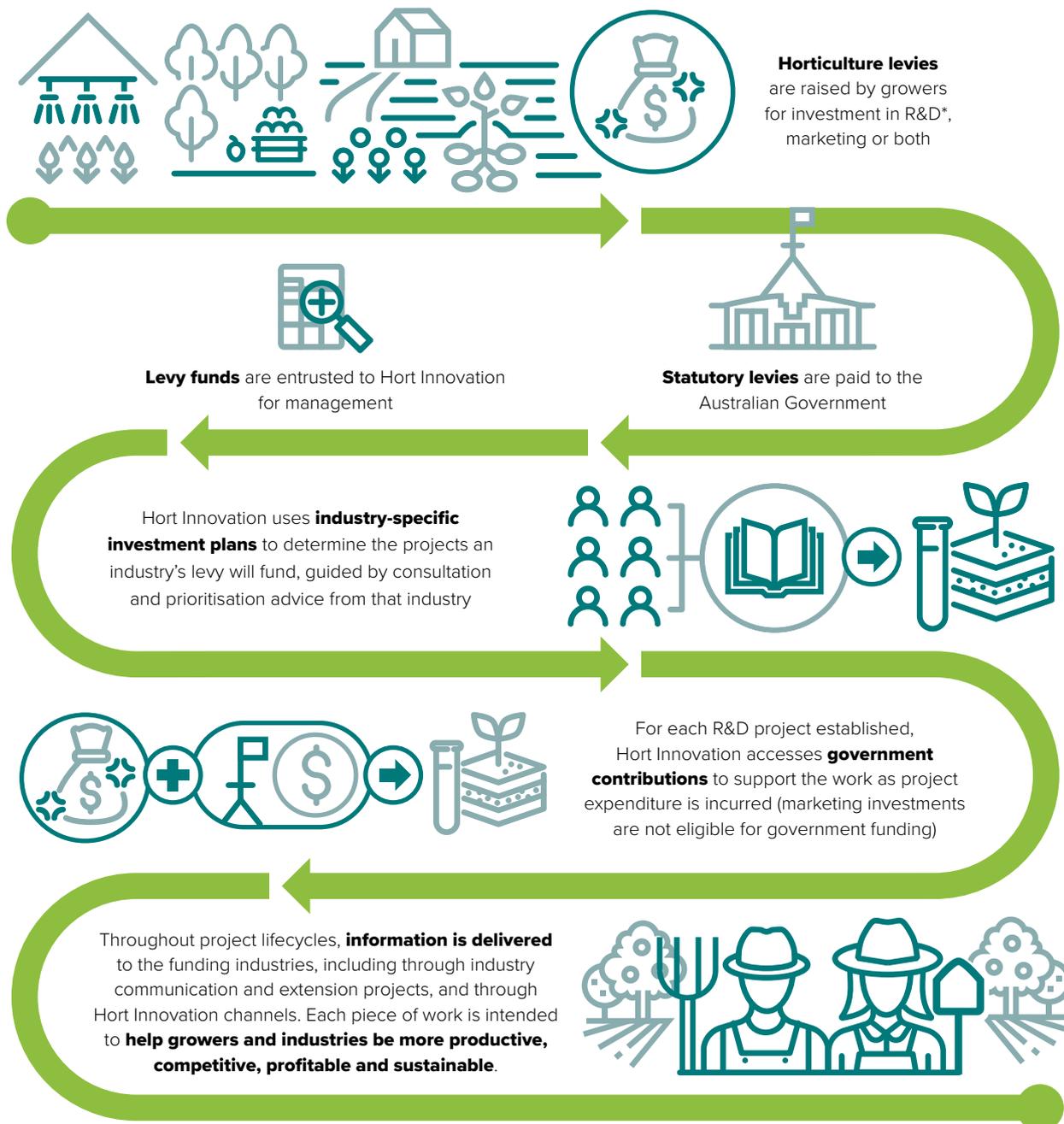
Just some of the things delivered for you during the year:

- ✓ **The industry communications program**, delivering *The Vine* magazine, regular e-newsletters, events and the industry website, www.australiangrapes.com.au (p8)
- ✓ **New minimum maturity standards**, to help ensure the consistent supply of high-quality, good-tasting fruit to consumers (p7)
- ✓ **A host of biosecurity work**, including projects related to *Xylella fastidiosa* and Queensland fruit fly (see from p9)
- ✓ **The table grape Harvest to Home dashboard** providing regular household purchase data and insight reporting, at www.harvesttohome.net.au
- ✓ **Information and data to assist through COVID-19**, including the new *Hort Innovation Insights* podcast (www.horticulture.com.au/webinars) and regular consumer attitude and behaviour information (www.horticulture.com.au/impact-monitor)*
- ✓ **Domestic and international marketing campaigns** and, launched during COVID-19, **The Good Mood Food** across-horticulture campaign to support industries through the effects of recent times* (www.horticulture.com.au/the-good-mood-food)
- ✓ **Preparation support for fall armyworm**, including emergency minor use permits and an educational podcast series, www.bit.ly/armyworm-podcast*
- ✓ **Investments in the Hort Frontiers strategic partnership initiative** to address longer-term and often complex issues and opportunities critical to the future of Australian horticulture – see www.horticulture.com.au/hort-frontiers*
- ✓ **Projects supported by grants** secured by Hort Innovation, ranging from cross-sector Rural R&D for Profit Initiatives to horticulture-specific work to aid in access to crop protection products – see the Hort Innovation Annual Report 2019/20 for more*

*These initiatives were delivered outside of the Hort Innovation Table Grape Fund and, in most instances, did not involve the industry levy

Making investments in 2019/20

The below diagram shows how Hort Innovation makes strategic levy investments on behalf of horticulture industries. The table grape R&D and marketing levies were invested this way during the year, guided by the Table Grape Strategic Investment Plan and advice from the industry’s investment advisory panel.



To learn more about funding specific to the Hort Innovation Table Grape Fund, visit www.horticulture.com.au/table-grape. During the year, other sources of funding were also used to support activities for the benefit of Australian horticulture, including grant funding secured by Hort Innovation, co-investment dollars brokered through our Hort Frontiers initiative and centralised strategic levy reserves.

Investment planning and performance

During 2019/20, Hort Innovation continued to track investment expenditure against the Table Grape Strategic Investment Plan, while looking towards new developments in 2021. Access an at-a-glance copy of the current investment plan at www.bit.ly/table-grape-plan.

A performance analysis is coming

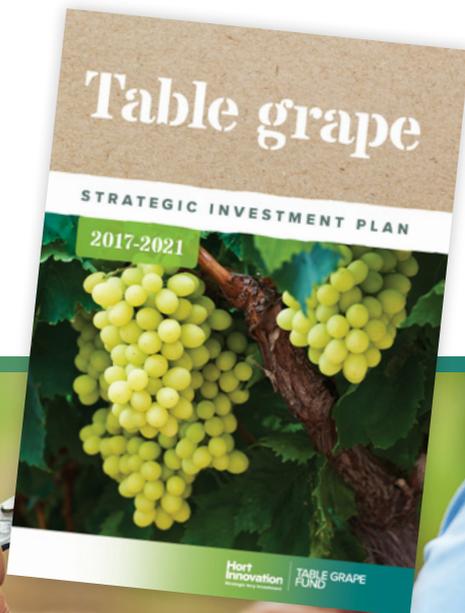
] During 2019/20, Hort Innovation continued to track investment expenditure against the Table Grape Strategic Investment Plan, while looking towards new developments in 2021. Access an at-a-glance copy of the current document at www.bit.ly/table-grape-plan.

See how your levy investments align to the industry's current plan

You can see how investment expenditure in the Hort Innovation Table Grape Fund aligns to the industry's current strategic investment plan with the interactive analysis information available from www.bit.ly/table-grape-investment. The analysis shows the allocation of funding against each of the table grape plan's outcomes, and gives an indication of the projects that are aligned to each outcome.

New ways of obtaining advice and setting priorities

In 2020/21, Hort Innovation will be implementing new ways of obtaining advice and setting priorities for industry investments. Renewed industry investment plans, plus new yearly (or as needed) program plans and new ways of consulting more broadly will mean more efficient investment and better outcomes for industry. Watch this space.



R&D project list 2019/20

NEW INVESTMENTS IN 2019/20

TG18003	Cold disinfestation verification trials for table grapes
TG18004	Australian table grape industry communications program
TG19000	Extension of technologies and best management practices to the Australian table grape industry
TG19001	Trapping efficacy in table grape vineyards for area wide management of Queensland fruit fly
MT19003	Parasitoids for the management of fruit flies in Australia
MT19005	Horticulture trade data
ST19018	Xylella insect vectors

ONGOING INVESTMENTS IN 2019/20

TG16000	Table grape industry minor use program
TG17000	In market insights and emergency scenario planning
TG18000	Review of the biosecurity plan and manual for the viticulture industry
AM17001	Developing a national systems approach for meeting biosecurity requirements to access key Asian markets
AM17010	Taste Australia trade shows*
FF18003	SITplus: Port Augusta Qfly SIT factory pilot operation
MT14052	Essential market access data packages
MT17006	Improving preparedness of the Australian horticultural sector to the threat potentially posed by <i>Xylella fastidiosa</i> (a severe biosecurity risk)
MT17006	Xylella coordinator

ONGOING INVESTMENTS IN 2019/20 (continued)

MT17015	Consumer behavioural and retail data for fresh produce
MT18005	Improving plant industry access to new genetics through faster and more accurate diagnostics using next generation sequencing
MT18011	Ex-post impact assessment [^]
MT18017	Taste Australia retail program

* This investment is a parent program, under which further event-specific Taste Australia investments may sit

[^] This multi-industry project was a key monitoring and evaluation investment during 2019/20 – we encourage you to find the full details at www.horticulture.com.au/mt18011

INVESTMENTS COMPLETED IN 2019/20

TG16003	Digital technologies for dynamic management of disease, stress and yield
TG17002	Table grape supply chain quality 2017-2021
TG18001	Building capacity in area wide integrated pest management for Qfly in table grapes
TG18002	Area wide integrated pest management support for Qfly in table grapes
MT13059	SITplus: Developing and optimising production of a male-only, temperature-sensitive-lethal, strain of Qfly, <i>B. tryoni</i>
MT15026	Evaluation of dried and table grape varieties
MT16010	Horticultural trade data 2017-19
MT17005	Improving the biosecurity preparedness of Australian horticulture for the exotic spotted wing drosophila (<i>Drosophila suzukii</i>)
MT18009	Ex-post impact assessment – industry specific
ST16008	AgVet collaborative forum

R&D report

Take a closer look at some of the key investments in the Hort Innovation Table Grape Fund during 2019/20. You can also visit www.horticulture.com.au/table-grape at any time to access information on new, ongoing and completed projects, and to download resources produced by levy investments, such as fact sheets and guides.

Table grape supply chain quality 2017-2021 (TG17002)

NOW COMPLETE

Key research provider: Delytics, with support from the Australian Table Grape Association

Now concluded, this project's outcomes continue to assist the Australian table grape industry in the consistent supply of high-quality, great-tasting fruit that satisfies consumer expectations.

Its work involved monitoring table grape maturity and other quality indicators on farm, at retail and at export packing, and providing this information to the industry throughout each season from 2017/18 to 2019/20.

Using data from the first two seasons of maturity monitoring – which revealed that immature fruit was being harvested and damaging consumer confidence – the team worked with key industry stakeholders to develop new minimum maturity standards for public grape varieties including Crimson Seedless, Flame Seedless, Menindee Seedless, Red Globe and Thompson Seedless.

The Australian Table Grape Association announced the new minimum maturity standards in October 2019, and they were partially adopted for the 2019/20 season, ahead of full adoption in 2020/21.

The standards rely on Brix, which is used to determine the sugar content in fruit. While the standards may be seasonally adjusted as needed, at the time of their release, Crimson, Flame, Red Globe and Thompson varieties were to have at least 80 per cent of fruit in a representative sample to have at least 16°Brix. Meanwhile, Menindee grapes were to have at least 80 per cent of fruit in a representative sample with at least 15.5°Brix.

In the 2019/20 season, with just the partial implementation of the new standards, consumer acceptability at retail for table grapes

was at 79 per cent – the highest score in five years, and up 20 per cent from the 2016/17 (the year before the project started).

This was a promising result, as consumers need to be confident of a good eating experience when purchasing grapes to encourage repeat purchase. This is particularly important due to the fruit's short season, with any re-purchase delay having an impact on demand, sales and price – and market research in 2017 revealed that after a negative eating experience, consumers will delay purchase for about six weeks, and require another two to three purchases before their loyalty is restored.

The projects work has highlighted the need for growers to resist the temptation to harvest immature fruit in order to capture higher market prices early in the season, and instead wait until fruit is mature to satisfy consumer preferences for taste and sweetness, therefore securing increased sales through repeat purchasing behaviour.

For more on the project, including fact sheets and access to the full final research report, visit www.bit.ly/tg17002.

Evaluation of dried and table grape varieties (MT15026)

NOW COMPLETE

Key research provider: CSIRO

This multi-industry project worked towards the delivery of new grape varieties for both the dried grape and table grape industries, with levies from both used to fund the work. It has led to the prioritisation of promising selections for future commercialisation.

For table grapes the project looked at new varieties adapted to local conditions, to enable Australia to differentiate its products in international markets, enhance export opportunities and increase domestic consumption. Future new varieties are intended to reduce production costs and minimise issues

Continued >>

such as berry collapse in Thompson Seedless, as well as poor budburst and low fruit bearing in sub-tropical regions. Early and late ripening types, and those with favourable long-term storage and transport characteristics, will also extend the season and provide opportunities to develop new markets

Digital technologies for dynamic management of disease, stress and yield (TG16003)

NOW COMPLETE

Key research provider: University of Queensland (for the table grape component)

Through this project, the table grape levy was invested into a component of research feeding into a larger Australian Government Rural R&D for Profit initiative led by Wine Australia. The broader project has been developing innovative processes and precision technologies for the grape and cotton industries. The introduction of new digital technologies will provide for more accurate yield forecasts, earlier disease detection, and better management decisions about crop condition and nutrient levels.

The component of the work involving the industry levy came to an end in 2019/20. It looked at a range of digital technologies to help improve the accuracy of spray placement and dosing in dynamic grapevine environments.

Having the means to automatically turn nozzles off when there is no foliage adjacent to them – and on when there is – provides a significant opportunity to avoid spray drift and reduce the amount of crop protection product used, creating benefits for the grower, environment and community. Precision, variable rate and targeted spraying all require accurate assessment of the canopy, which changes throughout the season and within and between each vine plant and row.

To assist with this, the project team investigated sensors – including LiDAR and radar – to assess crop density and target location; a freely available app (VitiCanopy) to provide an improved estimate of dose through a PAVE ('Pesticide dose rate Adjustment to the Crop Environment') calculation; drones to automate spraying; and a novel electronic 'leaf' to verify spray deposition.

Information on the results of this work are being compiled together with results from the broader, multi-project initiative. When ready, they will be made available from the Department of Agriculture, Water and the Environment and linked to from the Hort Innovation Table Grape Fund page at www.horticulture.com.au/table-grape.



Australian table grape industry communications program (TG18004)

NEW IN 2019/20

Key research provider: Australian Table Grape Association

This project maintains and improves communication to Australian table grape growers and other industry stakeholders. By keeping the industry up to date on R&D and marketing activities, news, events and other critical information, table grape businesses are supported in their decision making and adoption of new research and technologies.

A number of regular communications channels are produced and maintained by this investment, including but not limited to:

- » Quarterly magazine *The Vine*, distributed to industry stakeholders and available at www.australiangrapes.com.au/publications
- » The Australian Table Grape Association (ATGA) website, www.australiangrapes.com.au
- » Regular *Pick of the Bunch* e-newsletters from ATGA, which you can sign up for at www.bit.ly/pick-of-the-bunch
- » ATGA social media channels including Facebook (www.facebook.com/AustralianTableGrapeAssociation), Twitter (www.twitter.com/atgahortnetwork) and LinkedIn (www.linkedin.com/company/australian-table-grape-association)
- » Annual grower forums and other industry events (paused/delayed in the current COVID-19 environment).

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Extension of technologies and best management practices to the Australian table grape industry (TG19000)

NEW IN 2019/20

Key research provider: Australian Table Grape Association

This extension-focused investment was contracted in June 2020, in collaboration with the Australian wine industry, to ensure Australian grape growers are kept informed about current R&D activities, results and resources – supporting the adoption of industry best practice and bolstering grape production in growing areas across the country.

Due to the COVID-19 pandemic, the commencement of the extension program has been delayed for six months, to allow for suitable delivery of its key activities.

When the investment gets underway, it will support the employment of an industry development manager and industry development officer for the grape industry. These roles will be responsible for delivering industry development and extension services in a nationally coordinated, but regionally delivered manner. Activities will include:

- » Conducting workshop and field day sessions about best management practices and available technologies for growing table grapes
- » Holding regional forums across the country where research updates are presented
- » Developing industry tools (such as spreadsheets, manuals and videos) to facilitate the commercial adoption and adaptation of research outcomes and extension of technologies from the industry's research program
- » Providing technical articles for inclusion in the industry's communications program
- » Producing fact sheets and videos to further extend information demonstrated at field days or other pertinent issues
- » Fielding grower enquiries and undertaking farm visits to address issues and assist with adoption of new technologies and best practice
- » Facilitating the feedback loop between industry and researchers to ensure that R&D investments produce relevant and accessible outputs, and that any industry needs or gaps in knowledge are identified for further research.



Parasitoids for the management of fruit flies in Australia (MT19003)

NEW IN 2019/20

Key research provider: The Victorian Department of Jobs, Precincts and Regions

Involving funding from a range of industries, this investment is helping evaluate the use of parasitoid wasps in the potential management of fruit flies. The use of natural enemies such as parasitoids against insect pests is a core component in sustainable pest control and, if successful, will provide horticulture industries with another method to use for fruit fly management.

The research is being conducted through two complementary components – firstly by improving current knowledge of natural fruit fly parasitoid distribution in Queensland and northern New South Wales, and secondly by trialling a new mass rearing and release strategy for the southern states.

Trapping efficacy in table grape vineyards for area wide management of Queensland fruit fly (TG19001)

NEW IN 2019/20

Key research provider: The Victorian Department of Jobs, Precincts and Regions

Beginning in 2020, this investment is looking at mass trapping in the management of Queensland fruit fly in table grape crops. The project team is exploring the effectiveness of current trapping approaches, and developing and trialling an industry-specific mass trapping strategy for use by growers.

In demonstrating the use of mass trapping and delivering best practice guidelines to use on-farm, the work will help improve the area wide management of Queensland fruit fly, and contribute to continued market access.

Continued >>

Building capacity in area wide integrated pest management for Qfly in table grapes (TG18001) and Area wide integrated pest management support for Qfly in table grapes (TG18002)

NOW COMPLETE

Key research provider: Alison MacGregor (TG18001) and The Australian Table Grape Association (TG18002)

These investments worked together to deliver information on area wide management of Queensland fruit fly to table grape growers, pest scouts and other supply chain stakeholders through education events in key Australian growing regions between late 2018 and mid-2019. With the populations of the pest increasing in table grape growing regions and adjacent areas, these information sessions provided growers with the knowledge needed to help mitigate the presence of Queensland fruit fly on-farm.

The project's workshops and field days shared information on the biology of fruit fly and provided run throughs of baiting equipment, with hands-on demonstrations of how identify, bait and trap the pest. Attendees received information packages about Queensland fruit fly and area wide management and, to get them started, a plastic trap, male pheromone lure and magnifying lens.

SITplus: Port Augusta Qfly SIT factory pilot operation (FF18003)

HORT FRONTIERS

Key research provider: University of Western Sydney, with Primary Industries and Regions South Australia (PIRSA)

A purpose-built sterile Queensland fruit fly facility was established in Port Augusta, South Australia under earlier work in the Hort Frontiers Fruit Fly Fund and broader SITplus initiative. With sterile insect technology (SIT) a promising control method for Queensland fruit fly, the facility is a state-of-the-art factory for the mass-rearing of sterile flies.

This investment is continuing support for the pilot operation of the facility, allowing delivery of sterile flies to an associated pilot release project. It is also delivering further research to optimise the SIT approach and improve the production of healthy and high-performing sterile fruit flies. The work is being funded through co-investment from a range of partners, funding from the Australian Government, and some contributions from levy industries, including through the Hort Innovation Table Grape Fund.

For more on the facility, SITplus program and Hort Frontiers Fruit Fly Fund, visit www.horticulture.com.au/hort-frontiers.

SITplus: Developing and optimising production of a male-only, temperature-sensitive-lethal, strain of Qfly, *B. tryoni* (MT13059)

NOW COMPLETE

HORT FRONTIERS

Key research provider: South Australian Research and Development Institute (SARDI)

This investment has successfully demonstrated a method to develop a 'temperature-sensitive lethal, male-selecting' strain of Queensland fruit fly. Put simply, its work will allow for male-only, sterile fruit flies to be bred in large numbers as part of the SITplus initiative, to optimise the release of sterile flies as part of a SIT-aided, area wide management approach to controlling the pest. Released into specific sites in south-eastern Australia, the sterile flies will come to outnumber the wild male population and, by mating with wild females – and limiting the opportunity for wild males to do so – they are intended to lead to the collapse of wild Queensland fruit fly populations.

Levies from several horticulture industries were involved in the project which, as a SITplus initiative, was part of the Hort Frontiers Fruit Fly Fund.



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Improving the biosecurity preparedness of Australian horticulture for the exotic spotted wing drosophila (*Drosophila suzukii*) (MT17005)

NOW COMPLETE

Key research provider: Plant Health Australia

Running from 2018 to 2020, this multi-industry investment improved awareness of the risks posed by spotted wing drosophila, which attacks a range of soft-skinned fruit, as well as enhanced Australia's capacity to detect and respond to any incursions of the pest.

Most importantly, this project developed a framework for modelling spotted wing drosophila establishment and movement throughout Australian regions, allowing for a comprehensive preparedness plan to be developed for a swift response in the event of an incursion. The plan includes an extensive list of recommendations for industry, including relating to surveillance, control techniques, engagement and awareness, and diagnostics.

The project also worked to build knowledge and capacity around appropriate surveillance and management tools and strategies within the growing industries, government and among other relevant stakeholders. It produced a range of materials for growers, including identification information, a fact sheet on spotted wing drosophila hosts, and a webinar detailing preparedness for the pest.

Full details and links to the project's resources – and final research report – can be found at www.bit.ly/mt17005.

Xylella insect vectors (ST19018)

NEW IN 2019/20

Key research provider: Wine Australia

This project is a collaboration between Hort Innovation and Wine Australia to help safeguard Australia against the potentially catastrophic *Xylella fastidiosa*. This exotic bacteria impedes the movement of rising sap in plants and, were it to enter the country, it could threaten more than 350 commercial, ornamental and native plant species.

The project team is identifying and assessing insects in Australia that could potentially carry and transfer the bacteria, should it arrive on our shores. Developing an understanding of these potential insect vectors – including their feeding behaviour, population dynamics and range – will build essential knowledge to help in how xylella could be detected and contained in Australia.

The work is a partnership through the Plant Biosecurity Research Initiative (PBRI), a collaboration between Australia's seven plant-focused Rural RDCs, Plant Health Australia, the Department of Agriculture and other contributors, to coordinate plant biosecurity RD&E funding and efforts. You can learn more at www.pbri.com.au.

Xylella coordinator (MT17006)

Key research provider: Wine Australia

This multi-industry and multi-sector investment supports the role and activities of a national coordinator as part of a three year program to improve Australia's readiness for any potential incursion of *Xylella fastidiosa*. Like the project above, this is another joint initiative between Hort Innovation and Wine Australia, through the PRBI.

Improving preparedness of the Australian horticultural sector to the threat potentially posed by *Xylella fastidiosa* (a severe biosecurity risk) (MT17006)

Key research provider: The Victorian Department of Jobs, Precincts and Regions

Adding to the PBRI's xylella work, this multi-industry investment will allow Australia to adopt world's best practice methods for detecting and identifying strains of the *Xylella fastidiosa* bacteria, should it come to our shores. As well as developing state-of-the-art diagnostic tools, technologies and protocols to screen plant material entering the country and to support active surveillance programs, it will provide associated training to technical staff in diagnostic laboratories.

The project's work will ultimately allow for quick and effective detection of what is considered to be the number one plant biosecurity threat to Australia and New Zealand, to facilitate a swift and sure response.

Review of the biosecurity plan and manual for the viticulture industry (TG18000)

Key research provider: Wine Australia (with activities delivered by Plant Health Australia)

This investment provides funding into a collaborative project with Wine Australia, to deliver an updated viticulture biosecurity plan for the grape-growing industries. The biosecurity plan is a top-level document identifying high-priority endemic and exotic pests and diseases, along with the risk mitigation activities required to reduce their biosecurity threat.

Continued >>

For growers the work is also developing an updated biosecurity manual with key information on managing biosecurity threats, as well as series of fact sheets detailing high-priority threats for the industry.

The current biosecurity documents for the industry are available from Plant Health Australia at www.planthealthaustralia.com.au/table-grapes.

Improving plant industry access to new genetics through faster and more accurate diagnostics using next generation sequencing (MT18005)

Key research provider: Queensland University of Technology

This investment is tasked with supporting the adoption of 'next generation sequencing' in the screening of imported horticultural plant material in post-entry quarantine facilities. The technology has the potential to allow plants to move through the quarantine process much more quickly – allowing industry speedier access to new genetic stocks. Learn more at www.bit.ly/mt18005.

Developing a national systems approach for meeting biosecurity requirements to access key Asian markets (AM17001)

HORT FRONTIERS

Key research provider: Queensland Eco-sciences Precinct

Most horticultural trade relies on exporters demonstrating that the commodity either comes from an area that is free of pests and diseases (area freedom), or application of an agreed, stringent end-point treatment. Such end-point treatments are often costly, can impact upon quality, and may often be avoidable if other risk mitigation factors are accepted by importing countries.

This national project is a collaboration between industry, researchers and regulators that will help Australian horticulture enterprises realise market opportunities in Australia and Asia by developing a quantitative systems approach that will be acceptable to regulators. It will also be providing the supporting information necessary to help industries evaluate and adopt systems approaches.

Systems approaches integrate those pre- and post-harvest practices used in production, harvest, packing and distribution of a commodity which cumulatively meet requirements for quarantine security. The systems approach used in each region will set safeguards and mitigation measures which individually and cumulatively provide a reduction in plant pest risk.

Cold disinfestation verification trials for table grapes (TG18003)

NEW IN 2019/20

Key research provider: The Queensland Department of Agriculture and Fisheries

While Australian table grapes have access into several Asian markets under cold disinfestation protocols, further verification trials are required to support cold-disinfestation-based access into Taiwan.

This investment is conducting the trials required by the Taiwanese National Plant Protection Organisation to support the use of cold temperature as a postharvest treatment against both Queensland fruit fly and Mediterranean fruit fly. The results of the work will be used to support protocol negotiations between Taiwan and Australia's Department of Agriculture.

Table grape export readiness and market access (TG17000)

Key research provider: Australian Table Grape Association

Beginning in 2018, this ongoing investment is supporting the table grape industry's market access and development. Specific activities include, but aren't limited to:

- » Input into the maintenance of the industry's export strategy, detailing market access, improvement and development priorities
- » Work to develop export training materials for growers and exporters, aligned to the export strategy, as well as maintenance of online training for crop monitors
- » Input into the development of Export Quality Standards
- » Continued facilitation of the logistics involved in export, including the Department of Agriculture's registration and audit of export facilities
- » Other activities to develop and maintain new and existing markets, including coordination of inbound and outbound trade missions and participation in international trade shows.

The project also provides a point of contact for growers, exporters and others looking for expert industry advice in relation to the export of Australian table grapes, and is responsible for disseminating relevant information, including season updates and data on shipping and market conditions.

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Taste Australia retail program (MT18017)

Key research provider: Produce Marketing Australia (PMA)

While activity was paused in 2020 due to COVID-19, this multi-industry investment has been targeting key international retailers with training and educational resources about selecting, storing, handling and displaying Australian fresh produce in store, including apples and pears.

Its work is an R&D component of Hort Innovation's Taste Australia retailer engagement efforts in international markets. Other R&D work under the Taste Australia banner includes ***Taste Australia trade shows (AM17010)*** – a parent program that supports attendance at relevant international trade shows, to further develop export opportunities in key Asian and Middle Eastern markets.

Taste Australia is the whole-of-horticulture brand used to increase the profile, sales and consumption of premium Australian horticulture products in export markets, and is a central component of Hort Innovation's Hort Frontiers Asian Markets Fund. Learn more at www.horticulture.com.au/hort-frontiers.

Table grape industry minor use program (TG16000)

Key research provider: Hort Innovation

Through this project, levy funds and Australian Government contributions are used to submit renewals and applications for minor use permits for the table grape industry as required. These submissions are prepared and submitted to the Australian Pesticides and Veterinary Medicines Authority (APVMA).

For more on minor use permits, including a list of permits, see [p14](#).

All current minor use permits for the industry are searchable at portal.apvma.gov.au/permits. Permit updates are also circulated in Hort Innovation's Growing Innovation e-newsletter, which you can sign up for at www.horticulture.com.au/sign-up.

Consumer behavioural and retail data for fresh produce (MT17015)

Key research provider: Nielsen

This multi-industry investment provides regular consumer behaviour data and insight reporting to a range of industries, through the Harvest to Home platform (www.harvesttohome.net.au).

The platform has a dedicated dashboard for table grapes, making data and reporting easily accessible for industry participants. The information is intended to assist growers and supply chain partners in decision-making for their businesses and, for the wider industry, the data and insights are available to support strategic activities, as well as Hort Innovation Table Grape Fund marketing plans.

Ex-post impact assessment – industry specific (MT18009)

NOW COMPLETE

Key research provider: AgEconPlus

During 2018/19, Hort Innovation engaged independent consultants to evaluate the impact of our R&D investments. This included a specific look at the impact of work within the Hort Innovation Table Grape Fund, with a focus on projects completed within the five years to 30 June 2018, aligned to the current industry strategic investment plan. Six random projects were assessed, revealing a range of economic, social and environmental impacts being generated for growers, supply chain participants and the community at large. The projects had a benefit-cost ratio estimated at nearly three to one, and were expected to deliver some \$10.63 million in additional value to the industry and community over the next 30 years. Specific impacts identified ranged from a lower cost of production for table grape growers through to flow-on effects supporting community wellbeing in table grape growing areas.

Explore the full details at www.horticulture.com.au/mt18009.



Minor use permits

The Hort Innovation Table Grape Fund supports the submission of applications for new and renewed minor use permits for the industry, as well as data generation activities to support chemical permits and registrations, and strategic agrichemical reviews.

Together these efforts provide industry access to safe, relevant and effective chemicals for the management of pests, weeds and diseases.

For full details on these activities and links to relevant information, visit www.bit.ly/minor-use-table-grape.

Permits in 2019/20

During the 2019/20 financial year, permit renewal applications were prepared by Hort Innovation and submitted to the APVMA for PER13378 and PER14492, facilitated through the **Table grape industry minor use program (TG16000)**. These renewed permits were successfully issued in early 2020/21.

Meanwhile, fall armyworm – an incredibly destructive exotic pest – was detected on Australian shores for the first time in 2020. To support readiness and protect the horticulture sector, Hort Innovation was involved in securing emergency permits for crop protection chemicals, with all horticulture industries having at least one effective option available to them by the end of 2019/20. For the table grape industry, PER89241, PER89258, PER89278, PER89293, PER89263 and PER89870 were obtained for this reason.

Details for these and all other permits can be found in the following table.



Current permits

Below is a list of minor use permits for the table grape industry, current as of 21 September 2020.

PERMIT ID	DESCRIPTION	DATE ISSUED	EXPIRY DATE	PERMIT HOLDER
PER14868 Version 3	Chlorpyrifos / Grapevines / European earwig	01-Oct-14	31-Oct-21	CCW Co-operative
PER11748 Version 2	Sodium metabisulfite / Table grapes (packaged) / Phylloxera	17-Sep-09	31-Oct-24	Australian Table Grape Association (ATGA) C/Hort Innovation
PER12439 Version 4	Trichlorfon / Table grapes / Fruit fly	30-Aug-11	31-May-21	ATGA C/Hort Innovation
PER12770 Version 2	Glyphosate / Grapevine removal or destruction / Phylloxera	12-Oct-11	31-Dec-26	ATGA C/Hort Innovation
PER13378 Version 4	Fenbutatin-oxide (Torque miticide) / Table grapes / Rust mite and two-spotted mite	09-Nov-12	31-Jul-25	Hort Innovation
PER14492 Version 3	Bifenazate (Acramite) / Table grapes / Two-spotted mite	12-Nov-13	31-Aug-25	Hort Innovation
PER13859	Dimethoate / Orchard clean-up – fruit fly host crops following harvest / Fruit fly	9-Feb-15	31-Jul-24	Growcom
PER85499	Sulphur dioxide and carbon dioxide / Table grapes (for export to New Zealand) / Redback spiders	28-Nov-17	30-Nov-22	ATGA C/Hort Innovation
PER85594	Methomyl / Table grapes / Redback spider (all states except NSW and WA)	19-Feb-18	28-Feb-23	Vitor Marketing Pty Ltd
PER89241	Spinetoram / Various, including grapes / Fall armyworm	6-Mar-20	31-Mar-23	Hort Innovation
PER89259	Chlorantraniliprole (Coragen, Altacor and Altacor Hort Insecticide) / Table grapes / Fall armyworm	6-Mar-20	31-Mar-23	Hort Innovation
PER89263	Emamectin (Proclaim Opti Insecticide) / Grapes (except grapes grown for dried fruit production) / Fall armyworm	10-Mar-20	31-Mar-23	Hort Innovation
PER89278	Indoxacarb (Avatar Insecticide) / Grapes / Fall armyworm	13-Mar-20	31-Mar-23	Hort Innovation
PER89293	Methomyl / Grapes / Fall armyworm	10-Apr-20	30-Apr-23	Hort Innovation
PER89870	Spinosad (Entrust organic) / Various, including grapes / Fall armyworm	21-Jul-20	31-Jul-23	Hort Innovation

All efforts have been made to provide the most current, complete and accurate information on these permits, however you should always confirm all details on the APVMA website at portal.apvma.gov.au/permits. Details of the conditions of use associated with these permits can also be found on the APVMA site.

Keep up to date! Find monthly minor use permit updates in our *Growing Innovation* e-newsletter. Sign up for free at www.horticulture.com.au/sign-up.

Marketing report

Hort Innovation is responsible for investing the table grape marketing levy into a range of activities to drive awareness and consumption of Australian table grapes under the Hort Innovation Table Grape Fund. Read on for a snapshot of activities and results from the 2019/20 domestic and export marketing campaigns.

DOMESTIC MARKETING

The 2019/20 domestic marketing campaign aimed to drive awareness of the Australian table grapes season and maintain consumer preference for domestic varieties through a variety of activities.

Public relations (PR)

Aligning with the overarching marketing strategy for table grapes, the role of public relations was to continue encouraging domestic consumers to purchase more Australian table grapes by showcasing the versatility, variety and provenance, as well as their health benefits. The campaign delivered editorial coverage that showcased and positioned grapes as a nutritious, fun and refreshing snack. However, the outbreak of COVID-19 and resulting restrictions impacted media events and coverage (particularly a planned media farm experience), as well as the way consumers engaged with content and what they were putting on their tables. As such, activity was pivoted to respond to this change in landscape.

EDITORIAL COVERAGE

The outbreak of COVID-19 saw news editorial teams slimmed down and a number of print publications put on hold as the focus was shifted to news content, making any media cut through during this time extremely difficult. Consequently, the decision was made to withhold any proactive media outreach and to redirect this budget into creating and amplifying additional social media content throughout the grape season, to engage Aussies on the platforms they were using the most (see social media update on [p17](#)).

Despite this, a few publications directly requested to share content created with Aussie Grapes influencer chef partner Elena Duggan (see [p17](#)). In total, 12 pieces of coverage were shared across platforms such as She Defined (view the article [here](#)) and Western Australia's Community News publications shared one of Elena's recipes across local papers, totalling 11 different publications. In total, over 290,000 Aussies were reached by these publications.





MEDIA EVENT

To launch the 2019/20 season, an on-farm media event was planned in Western Australia with key west and east coast media representatives, to drive the Australian provenance messaging. Due to the impact of COVID-19 restrictions on travel and ultimately the closure of Western Australia’s borders to wider Australia, this activity was regrettably cancelled. These funds were redirected into creating and amplifying additional social media content throughout the grape season, to continue to reach Australians while at home.

CHEF PARTNERSHIP

In February 2020, the Aussie Grapes campaign partnered with chef and influencer Elena Duggan, winner of season eight of MasterChef. This partnership drove coverage and inspired and educated consumers on the different uses of grapes. It involved the creation of three recipes: Grilled Haloumi and Grape Salad with Pistachio Za’atar, Roasted Grape and Ricotta Toast with Walnut Crumble, and Chicken Schnitzel with Grape Slaw. Each of these recipes were shared across the Aussie Grapes social media channels (Instagram and Facebook), as well as Elena’s own social platforms.

Three media interviews were planned with Elena to share key messages around the provenance, versatility, variety and health benefits of table grapes. However given the impact of COVID-19 on securing media coverage this was reworked to hosting a series of three live 15-minute cook-a-longs (one for each recipe created) on Instagram, to take advantage of the increase in social media usage amongst Aussies in lockdown. Each of these videos performed exceptionally. The series was viewed by a combined total of over 28,000 people and generated strong interest – with people asking Elena for information on best uses for each grape variety and sharing intent to recreate the recipes. In total 18 pieces of social coverage were generated by this partnership with Elena, reaching over 775,000 people.

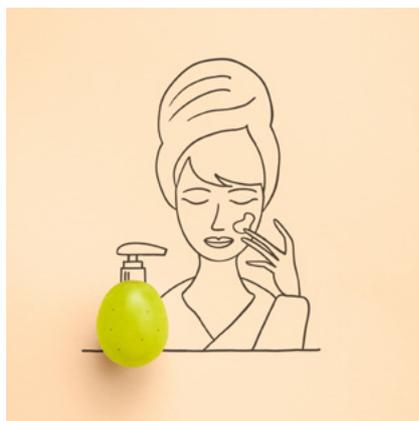
Social media

The 2019/20 campaign used a mix of content to keep table grapes top of mind for consumers, posting twice per week (on Facebook and Instagram), plus stories to support each post. The key messages that formed the basis of marketing content across social media channels were versatility, variety, provenance and health benefits. In response to COVID-19, the social media communications plan was reviewed to ensure it was appropriate in the current climate, while continuing to inspire Australians with delicious grape content and recipes.

Despite the impact of COVID-19, the 2020 social media program delivered stronger results compared to 2019 with all targets achieved and results across all metrics improved by an average five per cent year on year. Additionally, all results exceeded platform averages, highlighting an engaged consumer audience across both platforms.

CO-MAKER PARTNERSHIPS

Aussie Grapes engaged three co-makers (social media content creators) to develop a combined total of seven new Aussie Grapes recipes. With backgrounds as nutritionists both [@ournourishingtable](#) and [@livelovenourishaus](#) were chosen to create delicious and healthy recipes, targeting key consumers.



Meanwhile [@frommylittlekitchen](#) was utilised to target families through family friendly recipes. In response to COVID-19, the co-maker recipe briefs were re-focused to align with changing consumer needs and considerations during lockdown. These three key areas of focus included: healthy meals and snacks, comforting dishes, and family-friendly meals.

Each of the recipes were shared on the Aussie Grapes Instagram and Facebook pages, as well as the co-makers' own social media channels to leverage their own highly engaged audiences. In total, the co-maker partnerships generated 10 social media posts and reached 580,000 people.

Across the entire social campaign, the Aussie Grapes Facebook page (www.facebook.com/AustralianGrapes) generated 402,056 impressions (that is, the number of times content was seen), reached over 319,000 people (that is, the number of accounts that saw the posts) and generated over 76,400 engagements (that is, the total likes, comments, shares, saves, link clicks), and provided over 65,771 video views. On Instagram, Aussie Grapes ([@aussiegrapes](#)) generated 472,678 impressions, reached over 427,700 people, and generated over 118,600 engagements. The Instagram stories feature also provided an additional 677 impressions and reached an additional 567 people.



EXPORT MARKETING

Entering the second year of a three-year marketing strategy, the objective of the export marketing program was to continue protecting the premium positioning of Australian table grapes by connecting deeper with customers and consumers in key export markets. Several activities were undertaken that targeted priority markets as identified by industry.

Trade promotional seminars

Engaging the supply chain in export markets is critical to the success of growing demand for Australian table grapes and an effective way to do this is through trade promotional seminars. These events provide the chance

to give seasonal updates to buyers, retailers, wholesalers, importers and media. Seminars were held in six markets across seven cities in Vietnam, South Korea, Japan and Indonesia during early December, and in the Philippines and Thailand in mid-February. Fifteen Australian companies sent representatives to these seminars.

Jeff Scott, CEO of the Australian Table Grape Association, represented the Australian industry at the events, providing an overview of the Australian table grape season, food safety standards and supply chain management. In total, over 1000 individuals attended the events and the overwhelming response was that the events were highly worthwhile and helpful with decision making and forging relationships.





Taste Australia retail marketing

A number of consumer-facing Taste Australia retail activities were delivered across the prioritised export markets of China, Japan, Korea, Vietnam, Indonesia, Thailand and the Philippines during the 2018/19 season. Taste Australia is the whole-of-horticulture brand used to increase the profile, sales and consumption of premium Australian horticulture products in export markets.

Broadly, the table grape activity under the Taste Australia banner included launch events, in-store activations, PR activity and social media. The program delivered promotions in 642 stores and 398 sampling sessions with 27 retail partners. This resulted in an estimated gross merchandise value (fruit sold during campaigns) of \$6,248,923. There were more than 430 million consumer impressions through social media, PR and e-commerce activities and 296 media clippings. The return on investment was more than 9.75 to one, or 975 per cent – an extremely strong result, despite the COVID-19 pandemic.

» **In China**, a total of 135 sampling sessions were held across two retailer partners, City Super and Ole, in April and May 2020. To raise the profile of Taste Australia table grape activity, WeChat was used to announce the arrival of grapes

in market, while also educating on health benefits and varieties. This included providing information on the fruit being in season, the growing regions, safety and cleanliness, tips on how to select and consume grapes, nutritional benefits and retailer information to drive people to purchase with intent. Austrade also reposted Taste Australia's table grape articles to its WeChat account, which boosted the overall performance and increased exposure.

» **In the Philippines**, point-of-sale materials were produced and distributed to a total of 101 retail stores. To drive sale volumes, shoppers were incentivised with a gift with purchase across 46 stores and e-commerce platforms. For those who bought more than 3kg they received an eco-friendly Taste Australia branded tote bag. This saw the sale of 14,910kg table grapes.

The impact of COVID-19 saw more consumers turn to online platforms for grocery shopping, including premium fresh produce delivery services Crate2Plate and Baytown's Produce. These platforms were incentivised with 500 of the gift with purchase tote bags each (for purchases of more than 3kg) and the brands also shared a Taste Australia table grape video and

promotion on their websites as well as their Instagram and Facebook accounts. A total of 970 tote bags were distributed and approximately 2910kg of table grapes were sold through this promotion.

To drive media coverage, a media release, fact sheet and branded media kit containing Australian table grapes were provided to 80 media outlets and influencers, resulting in 33 media articles that had a reach of more than three million people combined. Three key opinion leaders were also engaged to champion the health benefits of Australian table grapes across their audiences. In total this paid coverage reached 9,944,033 consumers across Facebook and Instagram.

Gift boxes with Australian table grapes were sent to 80 premium local influencers, to encourage them to film and photograph the package and showcase the grapes on their social channels. This content was then shared across Taste Australia's own local Facebook. A total of 67 influencers shared content and this reached 11,133,206 people.

- » **In Thailand**, a co-promotion activity with the Victorian government was launched across 1700 Tesco Lotus stores, which included live in-store activity, point-of-sale materials, gift with purchase incentives and promotion by key opinion leaders. This drove broad awareness that Australian table grapes were in market, with the remaining activity supporting this message and driving purchase. The remaining campaign included exclusive Taste Australia point-of-sale material across 340 Tesco Lotus, Siam Makro, Tops and Foodland stores as well as promotion of incentives and sales on retailer social media that drove 70,919 engagements.

Activity was further promoted through influencers who shared recipe content on their social media – reaching 740,819 people – while gift packs of Australian table grapes were provided to media, driving 10 pieces of media coverage, totalling 3,415,845 reach. Key stakeholders were also gifted, including the Prime Minister of Thailand. The combined impressions of conventional media, retailer social media and influencers was more than 87 million.

Social media activity on Taste Australia's Thailand Facebook and Instagram channels rounded out the activity and resulted in 3.1 million impressions and 739,400 engagements.

- » **In South Korea**, the campaign was delayed from late February to early April on the advice of retailers due to the impact of COVID-19. Throughout the campaign footfall in stores was lower than usual, however online and TV shopping rose.

The gross volume of table grapes exported to South Korea this year was more than double that of last year, with an estimated 450 containers imported.



The volume increase provided more opportunities to sell table grapes through new platforms, such as TV home shopping channels K-Shopping and Shinsegae Home Shopping. These programs sold \$700,500 in table grapes over six sessions. Meanwhile, the in-store sampling program sold \$255,175 in table grapes, delivering a total sales result across activity of \$955,675.

Strong awareness was driven by revitalised point-of-sale materials that strengthened the link between Australia and table grapes for non-English speakers by featuring Australiana iconography such as kangaroos and koalas. These commanded premium locations and supported a sampling program across three key retailers.

This year's campaign also included a strong social media element to drive the awareness and education that retail sampling would usually achieve with the audience. Content was published across Taste Australia Korea's Facebook page with paid media targeting ensuring the key audience saw the content. The results yielded 1.25 million impressions and over 324,000 engagements.

- » **In Japan**, in-store sampling was prohibited due to their COVID-19 lockdown, however point-of-sale materials were allowed, and importer Kobe Yoko rolled out promotional materials at 16 stores in Okinawa, a remote area almost unaffected by COVID-19. This was the first time the campaign was run in Okinawa, with AEON and MaxValu retailers participating in the promotion. Instead of sampling, point-of-sale materials were increased and in-store TV monitors used to broadcast a video featuring Jeff Scott, shot on an Australian table grape farm.

More than 30 pieces of media coverage were secured across general news and health, lifestyle, business, and family media to drive awareness for the new table grape season. Three of Japan's most popular foodie influencers were also engaged to share recipes featuring Australian table grapes across their Instagrams, which had a total of 293,800 followers.

To drive the awareness and education that retail sampling would usually achieve, a social media campaign across Taste Australia's Japanese Facebook and Instagram accounts was deployed to reach people at home. This activity resulted in 3.9 million impressions and over 884,000 engagements.

- » **In Vietnam**, the campaign was quickly modified to account for COVID-19 restrictions, with the removal of retail sampling, and a focus on tactics such as point-of-sale materials across 94 retailers, gift with purchase incentives, digital advertising, key opinion leaders and influencers, and social media.

The campaign successfully saw an overall sell through of 72,807kg of Australian table grapes, driving total revenue of \$794,239. Digital advertising on key Vietnamese websites reached 3,084,954 while media articles saw an engagement of 133,000 and product seeding and educational posts by KOLs drove 66,148 engagements. The in-store activities including a display contest and gift with purchase promotion drove 216,800 interactions, while the gift with purchase helped sell through 17,000kg of grapes.

Social media drove awareness of table grapes in market through paid targeting deployed through Taste Australia's Facebook and Instagram accounts. Content was highly educational and creative and included the deployment of video and even an Instagram filter. This activity achieved 5.7 million impressions and drove two million engagements.

- » **In Indonesia**, this year's campaign was reduced following a delay in the release of import quotas by the Indonesia government, resulting in Australian table grapes not arriving in market until late March. This issue was overlaid with challenges related to COVID-19, with shopping centres in Indonesia closed, foot traffic restricted to 50 per cent in retailers, and a move to home delivery and online shopping as a result.

The reduced campaign included a strong social media element to drive the awareness and education that retail sampling would usually achieve. Content was deployed across Taste Australia's Facebook and a newly established Instagram account, and supported by content amplified through AEON's Instagram. The activity on Taste Australia's own channels reached 7.6 million impressions and 3.2 million engagements.



THE GOOD MOOD FOOD

In 2019/20, Hort Innovation created The Good Mood Food campaign to deliver an immediate and enduring behaviour-change message to motivate more Australians to eat more fruit, vegetables and nuts.

With the central message that these Aussie horticulture products are natural mood boosters, the campaign was developed to support the sector through the impacts of recent challenges including bushfires, drought, floods and of course COVID-19 – the effects of which continue to be felt in consumer spending and purchasing behaviour.

Initially running between May and November 2020, The Good Mood Food has been seen across the country on TV; in newspapers; on radio and music streaming services; online (including on YouTube and TV catch-up services); on social media; and via retail partnerships and advertising screens near supermarkets.

In July, 56 per cent of surveyed consumers said The Good Mood Food had positively influenced their shopping habits, and by the end of campaign's run, 98 per cent of all Australians were expected to be reached.

Learn more at www.horticulture.com.au/the-good-mood-food.

Financial statement

Financial operating statement 2019/20

	R&D (\$)	MARKETING (\$)	TOTAL (\$)
	2019/20 July – June	2019/20 July – June	2019/20 July – June
OPENING BALANCE	849,010	3,375,452	4,224,462
Levies from growers (net of collection costs)	887,300	882,548	1,769,847
Australian Government money	940,413	–	940,413
Other income*	13,459	54,240	67,698
TOTAL INCOME	1,841,172	936,788	2,777,959
Project funding	1,620,791	926,669	2,547,460
Consultation with and advice from growers	12,359	6,087	18,446
Service delivery – base	73,352	43,859	117,211
Service delivery – shared	105,326	62,977	168,304
Service delivery – fund specific	69,000	85,000	154,000
TOTAL EXPENDITURE	1,880,828	1,124,593	3,005,421
Levy contribution to across-industry activity	–	–	–
CLOSING BALANCE	809,353	3,187,647	3,997,000
Levy collection costs	46,693	51,444	98,137

* Interest, royalties

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