

Processing tomato

Strategic Investment Plan

2022-2026



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EXECUTIVE SUMMARY

The overarching strategic intent of this Strategic Investment Plan (SIP) is to deliver innovative and effective research and development (R&D), and capacity building solutions to support a sustainable and profitable processing tomato industry from producer to processor.

PRODUCTION REGIONS:



GROWERS/PROCESSORS:



No. of Growers: **11**
No. of Processors: **3**

PRODUCTION AREA:

 **2,073**
hectares

PRODUCTION/HARVEST WINDOW:

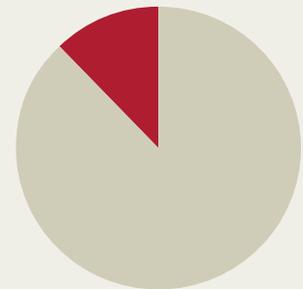


Production: **Oct-Apr**
Harvest: **Mar-Apr**

PER CAPITA CONSUMPTION:

23 kg 
(equivalent raw weight)

EXPORT/DOMESTIC:



PROCESSING TOMATO ONLY:
■ Domestic 88% ■ Export 12%

FARMGATE VALUE:

 **\$22**
million
in 2019/20

PRODUCTION VOLUMES:



210,477
tonnes
in 2019/20

THE PROCESSING TOMATO STRATEGIC INVESTMENT PLAN

The processing tomato SIP is the roadmap that will guide Hort Innovation's oversight and management of the industry's investment programs. It lays the foundation for decision-making in investments and represents the balanced interest of the whole industry. The important function of this SIP is to ensure that the investment decisions align with processing tomato industry priorities.

Hort Innovation has led the process for preparing the refresh of the processing tomato SIP, listening and engaging with levy payers and key stakeholders including the Australian Processing Tomato Research Council Inc. and expertise available through advisory mechanisms and delivery partners. The refresh process involved consultation with and input from a wide range of levy payers, objective analysis of performance and learning from the previous SIP, as well as environmental scanning to identify emergent trends and issues that could impact on industry profitability and sustainability.

The whole-of-company approach taken by Hort Innovation to produce this SIP has harnessed existing external and internal knowledge, learning, partnerships and relationships. The output is a tailored plan with which the processing tomato industry can be confident of its strategic intent, with visibility on how investment impacts will be identified.

Hort Innovation has valued the support, advice, time, and commitment of all stakeholders that contributed to producing this SIP, especially processing tomato growers.

Hort Innovation has developed this SIP for the processing tomato industry to strategically invest the collective industry fund (CIF) revenue into the priority areas identified and agreed by the processing tomato industry.

This SIP represents the Australian processing tomato industry's collective view of its R&D needs over the next five years (2022-26). Learning, achievements and analysis of the previous SIP, consultation with Australian processing tomato levy payers, and synthesis of various strategic documents have been incorporated into the development of this SIP. **Appendix 2** acknowledges the people who were consulted in the preparation and validation of this SIP. Statistics and data within this publication are sourced from the Australian Horticulture Statistic Handbook 2019/20 and other documents unless stated otherwise and are listed in **Appendix 3**. A list of acronyms used within the document is available in **Appendix 4**.



Financial estimates

The annual revenue from CIF income and Australian Government contributions for eligible R&D set the overall budget parameters for the processing tomato SIP. Importantly, a portion of these funds is already committed, as the industry has a current multi-year project for research, development and extension (RD&E) activities. In addition, the levy income from year to year will vary due to changes in seasonal and market conditions. The financial estimates used for the purpose of developing this SIP are presented in **Table 1** below and are indicative. The intention of the table is to offer a strategic overview of the industry fund at a specific point in time, and the figures will be regularly reviewed to reflect the latest information for the industry and any changes in investment priority.

TABLE 1. Indicative financial estimates for the processing tomato SIP over the life of the SIP

	2022 \$	2023 \$	2024 \$	2025 \$	2026 \$
R&D					
Balance end FY2021	(30,816)				
Estimated CIF funds (growers)	178,316	140,000	140,000	140,000	140,000
Australian Government contribution	147,500	137,500	137,500	137,500	137,500
Current investments	270,000	250,000	250,000	250,000	250,000
New investments	–	–	–	–	–
Total project investments	270,000	250,000	250,000	250,000	250,000
CCR	25,000	25,000	25,000	25,000	25,000
Projected end balance	–	2,500	5,000	7,500	10,000

Disclaimer: All figures are indicative only and may change depending on actual income and expenditure.

Balance end FY21 – The closing balance of the fund as at 30 June 2021

Estimated levy funds – Net levy income/revenue that is generated and collected by levy revenue services (LRS)

CIF – Collective industry fund: voluntary grower levy

Australian Government contribution – Amount of contribution from the Australian Government on R&D levy-funded expenditure

Current investments – Current estimated value of contracted projects

New investments – The estimated dollar value that is available for potential new investments for industry subject to industry advice

CCR – Corporate cost recovery: the cost to implement and manage R&D and marketing investment programs for each industry

Projected end balance – Forecast of the anticipated final position of the fund



“The important function of this SIP is to ensure that the investment decisions align with processing tomato industry priorities.”



PROCESSING TOMATO INDUSTRY OUTCOMES

The overarching strategic intent of this SIP is to deliver innovative and effective R&D, and capacity-building solutions to support a sustainable and profitable processing tomato industry from producer to processor.

Industry outcomes

Outcome statements as identified and prioritised by the processing tomato industry have been prepared under two key outcome areas: extension and capability; and industry supply, productivity and sustainability.

OUTCOME 1: Extension and capability

Building capability and an innovative culture.

Building capability and an innovative culture will support industry cohesion and increase knowledge, attitudes, skills and aspirations (KASA) to use relevant investment outputs to better manage risk and create positive change.

The strategic intent of this outcome is to manage knowledge, relationships, systems and processes required to communicate effectively with internal and external stakeholders. Achieving the outcome will involve:

- Increased KASA and practice change to support grower/industry profitability and sustainability through the adoption of best practice and innovation
- Growers, value chain, media and governments being well informed of industry initiatives and achievements as a vital part of regional communities and networks
- Improved networks and cross-industry collaboration to increase on-farm use of R&D outputs and to build a stronger, more resilient industry
- Proactive strategic and evidence-based decision-making in businesses and for industry on investment, priorities and risk management.



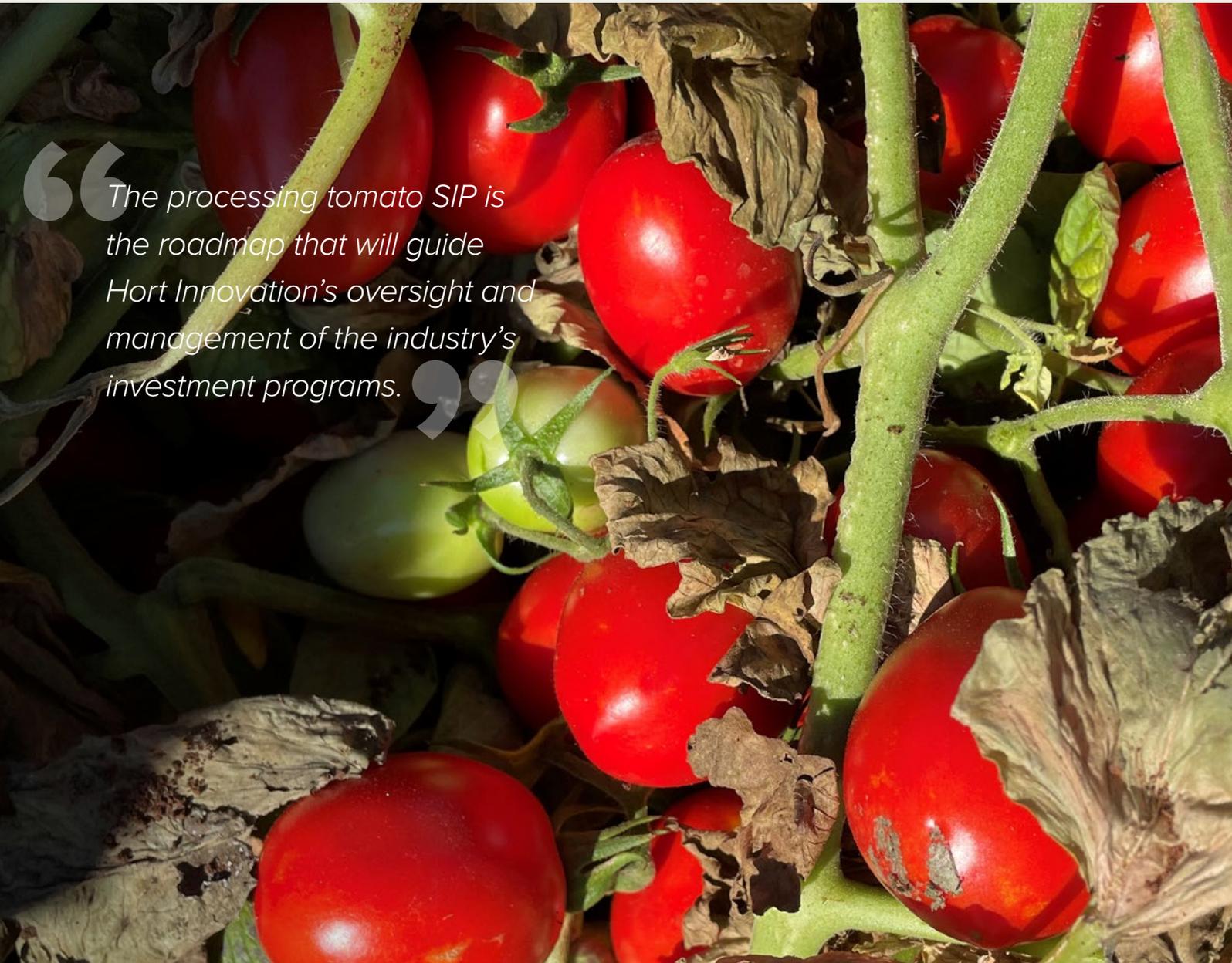
OUTCOME 2: Industry supply, productivity and sustainability

Improve industry productivity (inputs/outputs) to maintain local and international competitiveness, while maintaining viability and sustainability of supply.

Productivity will be driven through reducing costs and inputs while increasing outputs and value. Supply and productivity will be supported through improvements to production efficiencies to drive profitability outcomes, while ensuring long-term sustainability outcomes.

The strategic intent of this outcome is to accelerate the application of production practices that are proven to optimise returns and reduce risk to growers. Achieving the outcome will involve:

- Supporting activities to maintain or increase quality and reliability of processing tomato seed genetics and ensuring a sustainable seed supply chain underpinned by trials to identify desirable varietal characteristics, and to refine production best practice growing methods
- Striving to further identify and adopt environmentally sustainable practices.



“The processing tomato SIP is the roadmap that will guide Hort Innovation’s oversight and management of the industry’s investment programs.”



PROCESSING TOMATO INDUSTRY STRATEGIES

Strategies to address industry investment priorities

The strategies and identified impacts for each of the key outcome areas are described in the tables below. The highest priority investments lay the foundation for the SIP, and its implementation will require a balanced approach to ensure the industry has a high likelihood of success over the short term (0-3 years), medium term (3-5 years) and long term (5-10 years).

The ability to deliver on these strategies (and subsequent investments) will be determined by the ability of the CIF to provide the resources to do so. Further resources and efficiencies may potentially become available through alternative funding sources by way of Hort Frontiers strategic partnership initiative, external grants and/or cross-industry initiatives.

OUTCOME 1: Extension and capability

Improved capability and an innovative culture in the Australian processing tomato industry maximises investments in productivity and demand.

STRATEGIES	POTENTIAL BENEFIT OR IMPACT
1. Provide knowledge transfer to the industry value chain through targeted extension of research findings, best practice, emerging risks and opportunities, utilising the Australian Processing Tomato Research Council Inc. (APTRC) Industry Development Manager (IDM) role as a key link	<ul style="list-style-type: none"> Improved understanding contributing to increased on-farm adoption of R&D outcomes, building a sustainable, stronger, more resilient and profitable industry
2. Enhancing industry development and capability via effective seasonal communication and targeted extension activities to support innovation, develop skills and encourage new entrants to the industry, and utilisation of the APTRC IDM role as a key link	<ul style="list-style-type: none"> A change/progression in KASA for grower/industry profitability and sustainability which supports the adoption of best practice and innovations
3. Provide industry with relevant production, demand and industry insights through annual industry surveys as well as peer-to-peer reviews at industry events and farm visits	<ul style="list-style-type: none"> Increased industry capacity through informed decision-making



OUTCOME 2: Industry supply, productivity and sustainability

The Australian processing tomato industry has increased profitability, efficiency and sustainability through adoption of innovative R&D and sustainable best practices.

STRATEGIES	POTENTIAL BENEFIT OR IMPACT
1. Refine best practices for soil health, crop rotation, disease management and water-use efficiency	<ul style="list-style-type: none"> • Best practice tools available to growers to improve production efficiency and sustainability of growing systems
2. Support processors by aligning the selection of appropriate processing tomato genetics with the required tomato quality characteristics – complementing new and existing processing technologies	<ul style="list-style-type: none"> • Increased efficiency and quality throughout the supply chain
3. Enhance biosecurity preparedness in the processing tomato industry to reduce the risk posed by exotic and endemic plant pests	<ul style="list-style-type: none"> • Reduced risk of crop losses from exotic and endemic pests and diseases • Increased supply of and/or demand for Australian processing tomato products





PROCESSING TOMATO SIP MONITORING AND EVALUATION

The processing tomato SIP Monitoring and Evaluation (M&E) Framework development has been informed by Hort Innovation’s Organisational Evaluation Framework.

Progress against the SIP will be reported in Hort Innovation publications and through industry communication channels. The SIP outcomes and strategies are used to inform KPIs that in turn drive the investments and individual projects to deliver on the SIP. Projects responsible for delivering the strategy aligned with each KPI will collect the data.

An M&E and reporting framework is shown below. The framework shows what will be measured to demonstrate progress against the SIP and how metrics will be tracked. Reporting on KPIs will be processed through various formal channels to inform industry and government investors of progress, performance, and impact. Data sources to support M&E will be identified and collected as part of the requirements for each levy investment.

Hort Innovation will facilitate the regular review the SIP to ensure it remains relevant to industry.

Processing tomato SIP Monitoring and Evaluation Framework

The processing tomato SIP M&E Framework is shown below. It includes KPIs and data collection methods both at a macro/industry (trend) level and at more specific SIP strategic level/s.

OUTCOME	STRATEGIES	KPIs
Extension and capability		
Outcome 1: Improved capability and an innovative culture in the Australian processing tomato industry maximises investments in productivity and demand.	1. Provide knowledge transfer to the industry value chain through targeted extension of research findings, best practice, emerging risks and opportunities, utilising the APTRC IDM role as a key link	<ul style="list-style-type: none"> Establishment of a baseline and then increased share of the industry with positive change in KASA, and practice and implementation concerning targeted high priority areas
	2. Enhancing industry development and capability via effective seasonal communication and targeted extension activities to support innovation, develop skills and encourage new entrants to the industry, and utilisation of the APTRC IDM role as a key link	<ul style="list-style-type: none"> Demonstrated growth in cooperation within industry and across industries leading to business and industry innovations Increase in business and industry innovations due to development of trusted relationships
	3. Provide industry with relevant production, demand and industry insights through annual industry surveys as well as peer-to-peer reviews at industry events and farm visits	<ul style="list-style-type: none"> Availability of production, demand and industry insights that support production decisions



OUTCOME	STRATEGIES	KPIs
Industry supply, productivity and sustainability		
<p>Outcome 2: The Australian processing tomato industry has increased profitability, efficiency and sustainability through innovative R&D and sustainable best practices.</p>	<ol style="list-style-type: none"> 1. Refine best practices for soil health, crop rotation, disease management and water-use efficiency 2. Support processors by aligning the selection of appropriate processing tomato genetics with the required tomato quality characteristics – complementing new and existing processing technologies 3. Enhance biosecurity preparedness in the processing tomato industry to reduce the risk posed by exotic and endemic plant pests 	<ul style="list-style-type: none"> • Increased grower knowledge and adoption of soil health, water use and crop rotations • New technologies researched and/or developed in collaboration with growers • Increased production efficiency and/or improved product quality • Monitoring and involvement in essential industry biosecurity initiatives • Support of the development of appropriate crop rotations to enhance the ability to control existing and new pest and disease threats

Reporting framework

Hort Innovation will use dynamic reporting aligned to the Organisational Evaluation Framework to report regularly on progress and performance. Reporting will be processed through formal channels to inform industry and government investors.

A review of investment performance against the respective industry outcome and/or strategy-level KPIs for the processing tomato SIP will be completed annually as the primary reporting mechanism. The SIP performance report will provide:

- Evidence of progress towards achieving the industry-specific outcomes and strategies through an assessment of the KPIs identified in the SIP
- Evidence of progress towards cross-industry investment strategies and outcomes. It will involve Hort Innovation’s whole-of-horticulture reporting obligations and corporate plan and involve annual reports and Hort Innovation’s Annual Operating Plan.

SIP performance reports will also inform the Australian Government of progress towards achieving government priorities. In particular, reporting will support Hort Innovation to meet the Performance Principles and requirements contained in the [Deed of Agreement 2020-2030](#).





COLLABORATION AND CROSS-INDUSTRY INVESTMENT

Based on advice from industry throughout the engagement process, Hort Innovation understands that Australian horticulture industries have common issues, and in turn we have identified prospective areas for collaboration and cross-industry or regional investment.

These opportunities have been included as strategies across multiple industry SIPs where relevant and required. By delivering more multi-industry collaboration in research, development and extension (RD&E), marketing and international trade, Hort Innovation aims to support more effective and efficient outcomes for growers and the wider horticulture sector. This includes driving investment through the Hort Frontiers strategic partnership initiative. Importantly, while this approach acknowledges there is value in solving issues across industries and regions, it does not reduce the importance of industry-specific initiatives.

Investment opportunities through Hort Frontiers

Innovation is key to the future success of Australian horticulture. The next evolution of the long-range, higher risk and transformational R&D that has the potential to make a significant impact will be possible through Hort Innovation's Hort Frontiers strategic partnership initiative.

Hort Frontiers is a strategic partnership initiative that facilitates collaborative, cross-industry investments focused on the longer term and more complex themes identified as critical for Australian horticulture by 2030. The partnership framework is currently being established and will include a number of key investment themes for potential investment to guide the initiative and drive transformational R&D across horticulture. Key investment themes will include:

- Environmental sustainability (water, soil and climate)
- Pollination
- Green cities
- Biosecurity
- Health, nutrition and food safety
- Advanced production systems
- International markets
- Leadership
- Novel food and alternate uses (waste reduction).

The development of these areas for investment will benefit all of horticulture, with support from partners with aligned priorities to co-invest in deliverables identified that require alternative funds available outside the levy. Hort Frontiers is being developed to align with the Australian-grown Horticulture Sustainability Framework and invest in specific impact areas to drive innovation and sustainability initiative.

Australian-grown Horticulture Sustainability Framework

Hort Innovation has developed the Australian-grown Horticulture Sustainability Framework, aiming to strengthen the horticulture industry’s sustainability to meet the changing expectations and needs of growers, consumers, the community, investors and governments. The report applies across the whole of Australian horticulture, including fruits, vegetables, nuts, nursery stock and processing tomato. Through widespread consultation with industry and external groups, proposed sustainability goals and indicators were identified and are detailed within the framework. The framework is aligned to the UN Sustainable Development Goals.

Four key pillars were identified in the framework (*Figure 1*).



The framework should be cross-referenced when undertaking prioritisation of investments. At the time of publication, Hort Innovation is working with industry groups regarding the overall responsibility for the framework, setting and reporting progress against the framework targets and performance measures.

View the Australian-grown Horticulture Sustainability Framework on the Hort Innovation website [here](#).

Table 3 provides an example of a processing tomato SIP strategy that illustrates how the industry is already aligning to the framework.

TABLE 3. A processing tomato SIP strategy example showing how the industry is already aligning to the Australian-grown Horticulture Sustainability Framework

STRATEGY	IMPACT	SUSTAINABILITY GOAL
Refine best practices for soil health, crop rotation, disease management and water-use efficiency	<ul style="list-style-type: none"> Best practice tools available to growers to improve production efficiency and sustainability of growing systems 	Planet & Resources

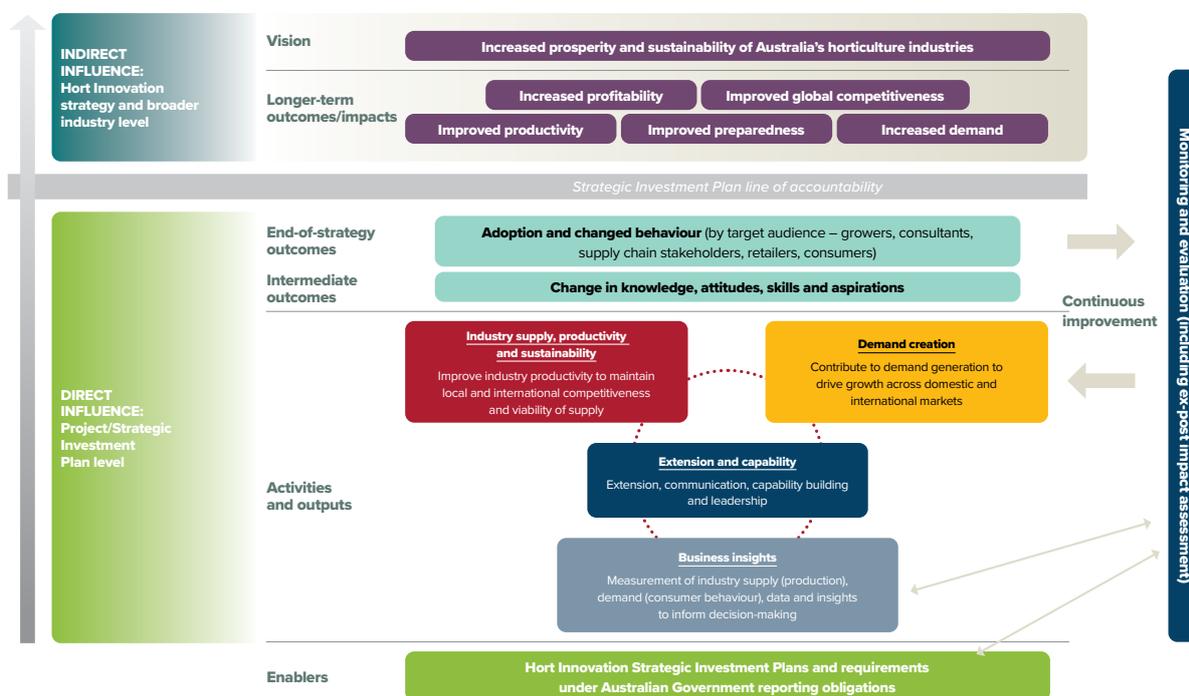
HORT INNOVATION



Strategic Investment Plan logic

The SIP logic (**Figure 1**) identifies how investment activities and outputs (delivered through each SIP outcome area) will support changes in industry KASA, which drive adoption and behaviour change. Beyond the SIP, investment will contribute to driving longer-term impacts for the sector like increased preparedness, demand, productivity, global competitiveness and profitability. Realising these impacts will support Hort Innovation’s vision of increased prosperity and sustainability of Australia’s horticulture industries.

FIGURE 2. Strategic Investment Plan logic



Aligning to Hort Innovation investment priorities

Hort Innovation is committed to sustainable growth in horticulture, with the overarching aim of increasing the sector’s value to \$20 billion by 2030. We will do this through implementing the SIP and investments against the three core pillars, committed to:

1. Drive knowledge and innovation into horticulture industries
2. Deliver the highest value R&D, marketing and international trade investments across industries now and into the future
3. Enable activities that drive all strategic imperatives.

Hort Innovation is governed by a Deed of Agreement with the Australian Government, which allows for the transfer

and investment of levies and Australian Government contributions. As an RDC, Hort Innovation is able to leverage industry levy investments in RD&E with Australian Government contributions up to a value of 0.5% of the industry’s gross value of production. All investments made by Hort Innovation are thoroughly considered to ensure they contribute to the guiding performance principles:

- Productivity
- Profitability
- Preparedness for future opportunities and challenges
- Competitiveness
- Demand: demonstrates how productivity, preparedness and demand lead to profitability and competitiveness and sustainability.



APPENDICES

APPENDIX 1: Processing tomato industry situation analysis

At the time of refreshing the SIP in 2021, the global coronavirus (COVID-19) pandemic continues to affect horticulture industries to varying degrees. Although the outcome and ultimate impact of the pandemic are unknown, areas of investment across horticulture that may be influenced over the period of this SIP include export and trade relationships, domestic and international demand, logistics and supply chain, labour supply – all having potential impacts on grower profitability.

Environmental, economic and social sustainability are vitally important to Australian horticultural growers and industries. Customers, consumers, and investors also seek information about the sustainability and ethics of how their food is produced. Sustainability is particularly crucial as topics such as climate variability, health and ethics continue to shape the social, environmental, and political landscape for agricultural industries. The impact of these issues may have influence on a whole range of investment areas for horticulture from production practices and land management, demand and reputation of products, quality expectations and cultural/community engagement.

Strengths, weaknesses, opportunities and threats

Table 2 has been used to analyse the processing tomato industry’s strengths, weaknesses, opportunities, and threats (SWOT). The SWOT tool assists the industry to build on what works, observe what is lacking, minimise risks, and take the greatest possible advantage of chances for success.

TABLE 2. Processing tomato SWOT analysis

The processing tomato industry	
Strengths	<ul style="list-style-type: none"> • Efficient, especially in relation to irrigation • Small but proactive, cohesive, entrepreneurial and communicative industry • Tight geographic distribution (also a weakness) enhances collaboration and facilitates innovation • World’s best practice – adapts quickly • Planning/scheduling well in advance • Skilled and motivated incumbent IDM, well regarded by all industry parties • ‘Clean and green’ image • Mature relationship between growers and processors • Focus on quality • Global networks of major industry processor



The processing tomato industry	
Weaknesses	<ul style="list-style-type: none"> • Small industry – results in challenges to meet supply to markets, limited interest from agrichemical companies and difficulties getting new variety seed through customs and into Australia expediently • Tight geographic distribution (also a strength) – increases seasonal risk • Variability of production due to seasonal conditions (much more variable climate than other tomato producing countries) • Spatial variability of yield, even within paddocks • Reliance on one majority seed producer • Variability in results of small trial plots • Currently, lack of knowledge of options for crop rotations on drip tape, leading to continuous tomato cropping with gradual declines in yields • Lack of benchmarking data • Ageing fleet of harvesting equipment, concentration of harvesting capacity in one company • Underpromotion of the ‘clean and green’ image • Australian product labelling laws benefit imported product over local product
Opportunities	<ul style="list-style-type: none"> • Reduce spatial variability in production – bring the whole crop up to yields achieved in some areas • Implement continuous improvement, especially in relation to quality • Review current or de-registered chemicals. • Increase adoption of new technology/innovation • Capitalise on changes in consumer attitudes (e.g., ‘clean and green’, ‘buy local’ – new country of origin labelling) • Undertake market research – consumer understanding/perceptions of taste • Develop alternative routes to markets • Develop a differentiated product offer • Develop new global markets (e.g., organics, new varieties) • Increase the proportion of production exported to high quality markets (although maintaining supply will be a challenge) • Reduce seed supply risks and expedite seed import processes through diversified seed/variety sources



The processing tomato industry

Threats

- Declining availability and quality of labour
- Declining availability of expertise in growing and processing – succession risk
- Risk of reduced irrigation water availability and increased cost
- Lack of capital and increasing interest rates
- Reducing margins (e.g., competitor and supermarket pressure)
- Increasing costs of energy and other cost inputs
- Increasingly stringent regulatory environment
- Biosecurity – political/technical (e.g., tomato potato psyllid (TPP))
- Increasing climate variability and change
- Rapidly increasing cost of thermal energy (gas)
- Stronger Australian dollar
- Increased competition from imports due to free trade agreements
- Reduced pressure on supermarket pricing
- Restricted seed supply due to prohibitive import costs and time-consuming testing procedures

APPENDIX 2: People consulted

The following people are acknowledged for their contribution to the processing tomato SIP development process.

NAME	INDUSTRY ROLE
Tony Henry	Grower
Charles Hart	Chair, Australian Processing Tomato Research Council Inc.
James Weeks	Grower
Andrew Ferrier	SPC Ardmona Operations Limited
Ann Morrison	Research Manager, Australian Processing Tomato Research Council Inc.
Matthew Stewart	Industry Development Manager, Australian Processing Tomato Research Council Inc.
Peter Gray	Accounting & Administration, Australian Processing Tomato Research Council Inc.
William (Bill) Ashcroft	Industry consultant
Chris Taylor	General Manager, Field Operations, Kagome
Sean Kennedy	Grower
Sam North	NSW Department of Primary Industries
Johanna Morgan	Agronomist



APPENDIX 3: Reference material

Australian Processing Tomato Research Council Inc., 2021, <https://www.aptrc.asn.au/>
 Horticulture Innovation Australia Limited, 2012, Processing Tomato Draft Strategic Investment Plan 2018-2023
 Horticulture Innovation Australia Limited, 2019, Growing into the Future: Strategy 2019-2023
 Horticulture Innovation Australia Limited, 2020, Australian Horticulture Statistics Handbook 2020/21
 Horticulture Innovation Australia Limited, 2021, Australian-grown Horticulture Sustainability Framework

APPENDIX 4: List of acronyms

AIP	Annual Investment Plan
APTRC	Australian Processing Tomato Research Council Inc.
APVMA	Australian Pesticides and Veterinary Medicines Authority
CIF	collective industry fund
CSIRO	Commonwealth Scientific and Industrial Research Organisation
FY	financial year
IDM	Industry Development Manager
IRB	Industry Representative Body
KASA	knowledge, attitudes, skills and aspirations
KPI	key performance indicator
M&E	monitoring and evaluation
MRL	Maximum Residue Limit
NHRN	National Horticulture Research Network
R&D	research and development
RDC	Research and Development Corporation
RD&E	research, development and extension
SARP	Strategic Agrichemical Review Process
SIAP	Strategic Investment Advisory Panel
SIP	Strategic Investment Plan
SWOT	strengths, weaknesses, opportunities, and threats
TPP	tomato potato psyllid



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