

Turf

Horticulture
Innovation
Australia

STRATEGIC INVESTMENT PLAN 2017-2021 AT A GLANCE

POTENTIAL IMPACT OF THIS PLAN



Based on an estimated investment of \$4.8 million
over the next five years

| OUTCOMES | STRATEGIES |
|--|--|
| Turf revenue has increased by five per cent plus consumer price index (CPI) from targeted marketing programs | Utilise market research and research results to focus levy-funded marketing activities on the benefits customers are seeking |
| | Disseminate market research and research findings to growers and encourage use in their own marketing programs |
| | Utilise strategic marketing techniques to leverage turf's marketing message including targeting of opinion leaders and influencers |
| | Undertake review of existing literature to collate benefits and identify information gaps |
| | Conduct research to address information gaps |
| | Communicate key messages to growers, government and key stakeholders |
| | Monitor, contribute and, where appropriate, invest into Pool 2 projects that potentially will increase demand for turf products |

| OUTCOMES | STRATEGIES |
|--|---|
| Improved strategic decision making by turf growers from increased knowledge of industry data and consumer insights | Monitor and understand who is buying turf, their reasons for buying turf, the customer journey, and what they are willing to pay for turf |
| | Monitor average retail price of turf (per square metre) by variety on all turf-producing states |
| | Obtain better metadata about the turf industry |
| | Define the different components of the turf Industry |
| | Have a credible organisation benchmark for the industry in regards to social, environmental, economic and health benefits |

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| OUTCOMES | STRATEGIES |
|---|---|
| Improved farm practices and profitability from increased awareness and adoption of turf R&D | <ul style="list-style-type: none"> Identify and fill innovation gaps in smart turf farming and its value-added chain Develop and implement an integrated extension program Deliver industry training when required Collate information into a single point for future reference Develop an effective communication program Regular monitoring to evaluate the effectiveness of communication activities and materials |
| Turf industry leadership program graduates are adopting innovation and using their leadership skills in business and industry decision making | <ul style="list-style-type: none"> Identify and engage future leaders and/or innovators into leadership programs Monitor effectiveness of programs to enhance networks, leadership skills, access and adoption of innovation Have future leaders involved in extending and promoting the adoption of R&D and marketing outcomes |
| Improved industry sustainability from identifying and managing risks | <ul style="list-style-type: none"> Monitor major risks impacting on the long-term profitability and sustainability of the industry Use of Minor Use Permits, where appropriate, to maintain access to chemicals Provide education, strategies, and documents on key risk areas when required |

Major opportunities

- Inclusion of turf in the 2020 Vision program and leverage with co-investment-funded projects, such as the *Greener Cities Healthier Lives* project
- Full-scale assessment of the industry's value including economic, environmental, social, health and wellbeing benefits to the Australian community
- Influence of government policy in regards to the role of turf in green spaces, soil erosion, ground water collection and bio-filtration systems
- Education on all of the benefits of turf to government and community
- Research on managing industry risk, including access to chemicals and emerging workplace health and safety (WH&S) issues
- Enhancement of growers' business and marketing skills through targeted programs
- Industry certification on quality
- Increase of levy, and change the R&D and marketing mix
- More market research to better understand and target private and levy-funded marketing activities
- Research on more efficient production systems, including the production of greater quality for less money
- Education on soil erosion and use of potential Australian Standards regarding the use of turf in such circumstances
- Increase the use of social media to build demand for turf products
- Enhancement of leadership and labour development within the industry
- R&D and investment in emerging technologies like precision farming and automation
- Greater alliance with other green space industries like nurseries.

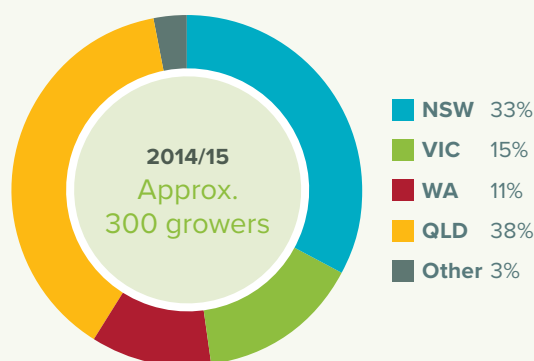
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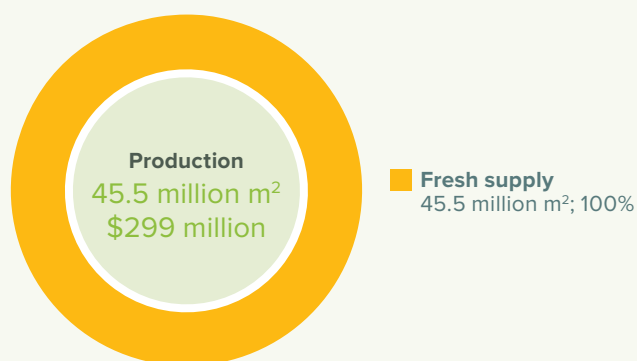
Major challenges

- Turf does not have a strong enough marketing and public relations presence
- Competition from other ground cover alternatives such as artificial turf and pavers
- Poor urban design and development resulting in reduced green space
- Misconception about turf in regards to costs, maintenance, and water usage
- Devaluation of turf by growers resulting in poor pricing
- Levy funds not delivering benefits to growers
- Increased government regulation, such as WH&S, adding to the cost of production of turf
- Water security and availability
- Continuation of trends to smaller residential blocks and increases in apartment living
- Environmental concerns about turf production, for example, water runoff and chemical usage
- Industry is not communicating the benefits of turf to government and the general public
- Insufficient marketing of turf and the benefits it offers the Australian community
- Lack of recognition by government and community about the benefits of turf
- Poor understanding of business and marketing within segments of the industry, including cost of production and overheads
- Treated as a commodity and, therefore, price cutting
- Growers' pricing structure does not reflect the value of product and, therefore, places undue pressure on enterprise profitability
- Parts of the Industry are not cohesive or working together
- Poor and expensive levy-collection process
- Not all growers are paying the levy
- Reduced access to chemicals
- Lack of water security for turf production
- Availability of reliable labour
- Slow uptake of technology, including the use of social media
- Consumer perception that turf uses a lot of water
- The number of available varieties can be confusing for the consumer.

Industry size and production distribution



Turf supply chain and value 2014/15



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