

FEBRUARY 2022

Melon

Strategic Investment Plan 2018-2021

PERFORMANCE REPORT



Melon SIP 2018-2021 performance report

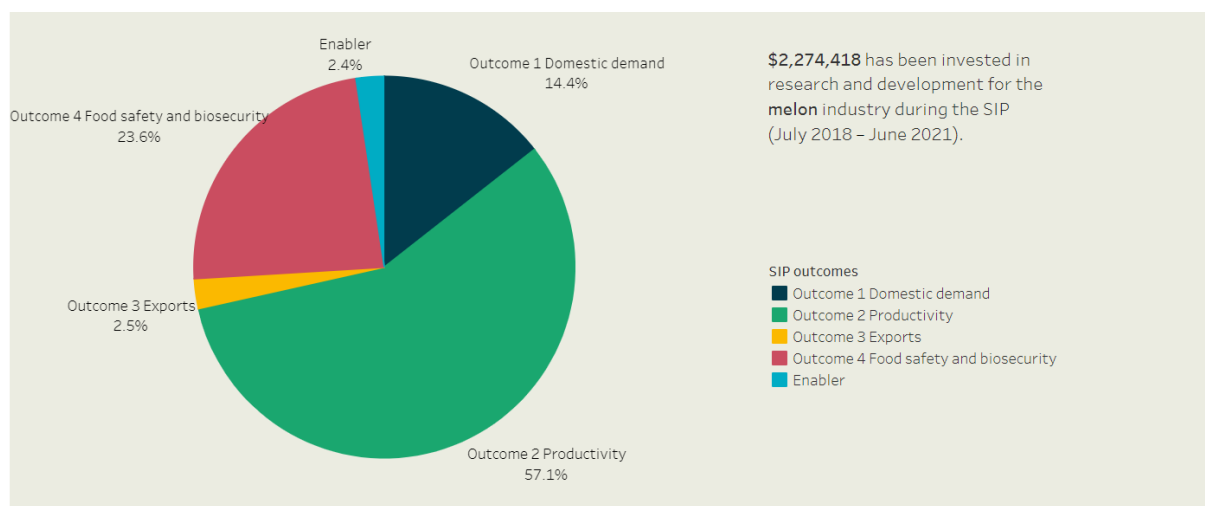
This performance report reviews the performance of levy investments delivered against the melon Strategic Investment Plan (SIP), which was active for the 4-year period from 2017/18 to 2020/21. The SIP was developed to strategically guide research and development (R&D) levy investment in accordance with core industry priorities. The SIP featured four outcome areas, 17 strategies and 20 key performance indicators (KPIs), summarised in Table 1. A total of \$2.3 million was invested into the Melon Fund over the 4-year period of the SIP. The total investment expenditure allocated against each outcome is provided in Figure 1.

Table 1: Melon SIP outcomes

Outcome	Description	Expenditure allocation*
1. Domestic demand	By 2021, improved consumer perceptions of melon quality have supported increased domestic demand	14.4%
2. Productivity	By 2021, the Australian melon industry has increased on-farm production efficiency, enabling improved returns to growers	57.1%
3. Exports	By 2021, the Australian melon industry has developed and maintained export market opportunities, enabling increased returns to growers	2.5%
4. Food safety and biosecurity	By 2021, the Australian melon industry has implemented actions in prioritised areas to mitigate and minimise risks including food safety and biosecurity	23.6%

*Total investment \$2.3 million as of June 2021. Balance of expenditure comprises of enabler investments, which includes expenditure to support the delivery of the SIP including advisory meeting and publication costs.

Figure 1: Melon SIP investment expenditure analysis



SIP performance analysis

This performance report reviews the investment achievements delivered within each outcome area that have generated impact for growers. The overall status of each strategic area, informed through an assessment of KPI performance, is also provided. The evaluation status and criteria were:

Strategic area status	Criteria
Achieved	KPIs for this strategic area were met
In progress	Investment delivery remains ongoing
Not achieved	Investment was not prioritised in this strategic area

The results have been informed from evidence compiled through reviewing investment documentation and engagement with project managers. Outcomes generated through the investments are documented and brief case studies of flagship performance and impact for each outcome area are also provided.

Outcome 1: Domestic demand – By 2021, improved consumer perceptions of melon quality have supported increased domestic demand

The melon SIP 2018-2021 recognised that production of Australian melons was already meeting domestic consumer demand with per capita consumption remaining steady. The strategic intent of this outcome was to support increasing consumer demand with the key challenge of maintaining or improving prices with expanding production.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support domestic demand of melons are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Conduct regular consumer research to gather insights on changing perceptions and expectations of fresh Australian melons	Achieved
Collate and distribute evidence of the positive product health attributes of Australian melons	Not achieved
Improve the reliability and consistency of year-round eating quality of Australian melons	In progress
Document and share evidence of industry-wide practices that strengthen and assure the safety and integrity of melon products	Not achieved

KPI callouts:

- The *Australian Horticulture Statistics Handbook* (HA18002) reported that over the 4-year period of the SIP, the average for fresh melon supply per capita decreased 16% when compared to levels prior to development of the SIP, while wholesale prices decreased 17%. The combined decrease in price and supply partly reflected the listeria outbreak in 2018.
- The project *Consumer insights for the Australian melon industry* (VM18000) profiled attitudinal and behavioural consumer dynamics for melons. Several opportunities were identified for further investigation including: educating health professionals; aligning retailer and consumer sensory quality perceptions; reviewing technologies to support quality assessment; and developing best practice guides for postharvest management. The report found limited concerns for food safety in regards to melons.
- Through the multi-industry project *Consumer behavioural and retail data for fresh produce* (MT17015), melon industry participants gained access to regular consumer behaviour data and insight reporting through the *Harvest to Home* platform.

Outcome 2: Productivity – By 2021, the Australian melon industry has increased on-farm production efficiency, enabling improved returns to growers

The strategic intent of this outcome was to accelerate the application of effective production practices that are proven to optimise returns and reduce risk to growers.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support melon productivity are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Promote the use of existing R&D and proven management practices that improve on-farm efficiency and increase profitability	Achieved
Undertake R&D and extension to enhance product quality, consistent with evidence of consumer expectations (with a focus on harvest and postharvest)	In progress
Develop applied research and innovation in melon growing systems for sustainable production and biosecurity management	Not achieved
Continual improvement in practices and processes that mitigate pest and disease threats	Achieved

KPI callout:

- Ongoing at the end of the SIP, *Understanding and managing the role of honey bees in CGMMV epidemiology* (VM18008) explored how honey bees are able to introduce cucumber green mottle mosaic virus (CGMMV) into melon crops, and will develop management practices to combat this for both the melon and apiary industries.

Case study: Melon industry development and communication (VM17001)

This investment, which ran from 2017 to 2020, supported Australian melon growers in adopting improved practices on-farm by keeping them informed on the latest industry news, information, resources and technologies.

To this end, the project funded the position of a dedicated Industry Development Manager (IDM). The industry development manager role was a broad one, with all activities geared towards improving the circulation and uptake of information within the industry. This included face-to-face events for the industry, such as a program of grower technical meetings throughout each year.

Some specific activities over the course of the program included:

- Visits to Asia and the Middle East in April and September 2019 which focused on strengthening the industry and relationships in key export markets
- Attendance at the 2019 Asia Fruit Logistica trade show held in Hong Kong in September which showcased Australian melon varieties through presentations, retail visits and a cooking display
- Facilitation of the Australian Melon Conference and field days: One was held over two days in September 2018, however another was to be held in March 2020 but was unfortunately cancelled due to COVID-19 restrictions. In place of the conference, six field day site videos have been published to showcase the melon varieties.

Core communication channels that were produced and maintained by the project include:

- *Monthly Melon* e-newsletters
- The industry's quarterly newsletter, *Melon News*, which is distributed in hard copy form and available digitally
- The Australian Melon Association website, with the industry area holding news, information and resources for growers
- The Australian Melon Association's Facebook page
- Factsheets on exotic pests and fusarium root rot have been developed, all of which can be accessed via the resources section on the Melons Australia website.

Outcome 3: Exports – By 2021, the Australian melon industry has developed and maintained export market opportunities, enabling increased returns to growers

The melon SIP 2018-2021 identified that international demand and trade in melons was steadily increasing, while export opportunities in new, premium markets were also developing. The Australian industry was seen as a potential beneficiary of this growth by positioning itself as a premium, high value product and gaining or improving market access.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support melon industry exports are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Develop and improve technical market access for Australian melons into priority markets	Not achieved
Maintain and improve trade with existing export markets, especially where opportunities exist in the premium end of the market	Achieved
Support export market demand through timely and accurate data, information and market research	Achieved

KPI callouts:

- The *Australian Horticulture Statistics Handbook* (HA18002) reported the average exports of fresh melon increased 41% from levels prior to development of the SIP, and reached a high of 11% of domestic production in 2019/20. In 2020/21 melon export volumes declined to 7% of production due to COVID-19 related challenges.
- The investment *Melon industry development and communication* (VM17001) oversaw key export activities including supporting the implementing the export strategy and export plan, in-market visits to rebuild lost market share following the listeria outbreak, and delivery of a comprehensive report on the potential for melon exports to Japan following successful market access for watermelons in 2016. Japan subsequently grew to be the fourth largest export market for Australian watermelons with up to 10% share of exports.
- The project *Market intelligence reports: Melon non-protocol markets* (HA18005) provided melon growers with monthly, quarterly and annual trade intelligence reports. The reports have supported the industry's understanding of trade performance and influences.

Outcome 4: Food safety and biosecurity – By 2021, the Australian melon industry has implemented actions in prioritised areas to mitigate and minimise risks including food safety and biosecurity

The strategic intent of this outcome was to strengthen the melon industry's ability to reduce the risk of and effectively manage incidents that could damage industry and product reputation and consumer confidence. The main emphasis was on prevention of biosecurity breaches and food safety incidents.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support melon food safety and biosecurity are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Identify and prioritise biosecurity and food safety risks across the supply chain	Achieved
Raise awareness of biosecurity and food safety risks across the value chain	Achieved
Develop, distribute and implement an industry-wide risk mitigation plan	Achieved
Implement best practice procedures across the supply chain	Achieved
Develop and implement systems for early detection and rapid response	Achieved
Support and complement the initiatives of the biosecurity levy	Achieved

KPI callouts:

- The project *Risk and crisis management planning for the melon industry* (VM18002) reviewed and updated the Australian melon industry's crisis management guidelines and ensured information and processes are established in the event of an issue or crisis. The project established and trained an industry Crisis Management Team (CMT) and promoted awareness of crisis management among melon industry stakeholders.
- The project *The effective control of listeria on rockmelons through alternative post-harvest treatment methods* (VM19000) sought to understand the cause of listeria outbreaks, and develop risk management strategies. A technical report was produced and recommendations disseminated that has encouraged a focus on a systems-based approach to sanitization.

Case study: Food safety, training, extension and capacity for the melon industry (VM17002 and VM18003)

The investment *Food safety, training, extension and capacity for the melon industry* (VM17002), which ran from 2018 to 2019, strengthened food safety in the melon supply chain by encouraging the adoption of best practice. It supported training activities across the country for melon growers, farm managers and key farm staff, and delivered a best practice 'toolbox' with essential food safety information and resources.

Key activities undertaken by the project included:

- **Industry practice review:** Over 20 rockmelon growers across the country participated in onsite technical visits to review their food safety practices. This identified critical points within the supply chain that needed to be considered from a food safety perspective going forward
- **A Best Practice Guide** was prepared with comprehensive information on rockmelon food safety risks and management strategies leading to practical outcomes. In addition, a **Food safety toolbox** resource was developed to help stakeholders identify, assess and manage food safety risks. It includes checklists for food safety management, developing standard operating procedures and display posters
- **Staff training:** During one-on-one visits to melon growing businesses accounting for more than 95 per cent of the industry, training was provided to key staff in identification and management of food safety risks. The training also covered measuring sanitiser concentrations, microbiological sampling and packing house hygiene control. All known packing houses were also visited to review their food safety risks. Business-specific recommendations were made and subsequently these businesses made changes to their infrastructure and postharvest operations changes. This transformation of food safety systems enabled the industry to regain domestic and export markets
- **Food safety helpdesk service:** The project has provided technical support to the industry via a helpdesk service, which included communication via face-to-face meetings, emails and phone calls. A variety of stakeholders have used this service
- **Delivery of regional roadshows, workshops and conference presentations:** Through developing a national collaborative network, five melon food safety workshops and regional road shows were delivered in key growing regions. These were attended by over 95 participants, including growers, packers, regulators, chemical resellers, consultants and researchers.

Investment in this area continues through the project *Food safety training, extension and capacity for the melon industry – phase 2* (VM18003). Information on training opportunities is circulated through the Australian Melon Association.