

## Berry Export Strategy 2028

*A quick overview of international trade opportunities and considerations*

### STRATEGY SUMMARY

The Berry Export Strategy 2028 provides the strawberry, raspberry and blackberry sectors with a strategic assessment of future opportunities for export market development over the next 10 years.

The strategy has been produced by Hort Innovation using industry research and development levies and contributions from the Australian Government.

The supporting data underpinning this strategy has been prepared by market analysts and researchers Auspex Strategic Advisory using an Export Market Assessment Model to filter, rank and prioritise export markets, and identify vulnerabilities. The strategy provides a valuable resource for growers and industry more broadly to identify any trade development investment opportunities.



## WHERE ARE WE NOW?

Strawberry, raspberry and blackberry production predominantly occurs in South East Queensland; North Coast, Central and Southern Tableland regions in New South Wales; Yarra Valley in Victoria; Northern and Southern Tasmania; Adelaide Hills in South Australia; and Perth and the Great Southern region in Western Australia.

The industry is largely made up of large corporate players, cooperative marketing groups, and a base of both large and small-scale independent growers. The sectors have seen significant growth in recent years, with strawberry production having almost doubled and raspberry and blackberry production more than tripling over the past five years. While not within the scope of the project because the industry does not pay a research and development levy, blueberries are also experiencing strong growth, and can also benefit from the export opportunities identified in this document.

Production, adoption of protected substrate cropping, improved genetics and an expanding geographic footprint are all contributing to the success of the industries. Berries recently overtook bananas as the highest value fresh grocery category domestically and are a key fresh growth category globally. It is an exciting time for the berry sector, a transition point. There is broad industry interest and a strong commercial appetite for export market development.

Australia typically exports more fresh berries than it imports. For the year ending June 2017, 4244 tonnes of fresh berries were exported.

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## WHERE DO WE WANT TO BE?

The strawberry industry Strategic Investment Plan, which was developed with industry, identifies increasing Australian strawberry exports from 4 per cent to at least 8 per cent of national production by volume, in selected markets with a capacity and willingness to pay a premium for quality fruit. It also notes the need to develop export markets and diversify the industry's product offering.

By 2021, the raspberry and blackberry Strategic Investment Plan aims to boost Australian raspberry exports by more than 5 per cent by volume, also in selected markets with a capacity and willingness to pay a premium for quality fruit.

## WHAT ARE THE OPPORTUNITIES?

The berry industries have an opportunity to leverage existing opportunities, and also explore new markets. The strategy identifies the best short-term prospect markets for Australian the berry industries as:

- 1. Hong Kong and Singapore:** Important market to build the wider industry's familiarity and experience with export, as well as the global reputation for Australian fresh berries.
- 2. United Arab Emirates:** A high income, relatively high-value market in which Australian product is already well-established with a premium positioning. Also, an important market to build the wider industry's familiarity and experience with export, as well as the global reputation for Australian fresh berries.
- 3. Canada:** A large, affluent, growing market with a strong cultural familiarity with the product, with some short windows of opportunity for premium trade that align with Australian production.

The strategy also identified Japan and Taiwan as high-value markets with a strong affinity for premium Australian food and agricultural products. Currently, there are market access restrictions however the berry industries could work towards overcoming these as a long-term strategy.

The strategy also identified several specific opportunities for each of the berry categories.

For the strawberry industry, the strategy suggests focusing on:

1. **Macau:** A popular high-end tourist and gaming destination for affluent mainland Chinese and other Asian tourists, presenting an opportunity to position Australia product with Asian consumers alongside trade into Hong Kong.
2. **New Zealand:** A small but very accessible developed market with limited import competition, where geographical proximity and close trade ties present significant advantages to Australian producers looking to quickly and competitively supply market windows.
3. **Thailand and Malaysia:** A high growth, relatively high-value middle-income market in which Australian product is already well-established with a premium positioning.

For the raspberry and blackberry industries, the export market rankings are dominated by high-income countries across Europe, North America and North Asia. South East Asian markets fail to stand out owing to their limited affinity for the product at present.

## WHAT ARE THE NEXT STEPS?

The Strategy makes the following findings:

- There are several high-value target markets which are currently open to trade and immediately accessible for berry industries. While developing these export markets, industry should also take a long-term approach and pursue new technical market access in other priority export markets for the future.
- More consumer insights research needs to be conducted to better understand target markets.
- The industry could benefit from joint marketing promotions with other Australian horticulture/ food and beverage products.
- It recommends the establishment/ pilot of an export facilitation manager to assist new exporters with the procedures and regulatory requirements for priority export markets.
- To capture knowledge on current strengths and gaps, the industry could benefit from investment in the identification and mapping of existing export supply-chain linkages and networks.
- It is recommended that industry develop an export advisory group to enhance industry coordination and input to government.

Hort Innovation will work with the berry industries to determine their appetite for levy investment and roll-out of trade-related research and development activities.

For more information on the berry industries, refer to the Horticulture Statistics Handbook and the Strategic Investment Plans for strawberries, raspberries and blackberries.

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