

Horticulture Innovation Australia

Final Report

Industry Roundtable Forum

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AP13036

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Summary

The project funded a series of apple and pear key stakeholder industry roundtables. The broad aim was to bring together the industry's principal business owners and leading decision makers for face to face roundtable discussions. The concept was based on acceptance that industry itself must help drive the initiatives underpinning the industry strategic plan New Horizons 2010-2015 and the Strategic R&D Investment Plan. This was to be achieved by harnessing the efforts of those with the most "skin in the game" to drive uptake and champion the specific actions that can help deliver the improved industry profitability outcomes sought within those Plans.

The roundtable format offered a unique means by which industry "thinking" could be harnessed to seize opportunities, to jointly develop high level strategies, and design actions to address one or more of the most pressing opportunities and/or threats facing the industry. The roundtable discussions offered different and additional perspectives that are not usually gained from meetings with the APAL Board and the Industry Advisory Committee (and its subcommittees).

This project provided funding to enable the Apple and Pear Industry Key Stakeholders Roundtable (the Roundtable) to meet once per annum at a "think tank" type summit. The group was considered too large to operate effectively via teleconference and too geographically dispersed to meet on a less formal basis.

The Roundtable met in 2014 and 2015. It generated specific actions in regard to the creation of a variety register, a tree registry and crop forecast, improvements to cool store stock reporting, quality guidelines and an enhanced focus on export market development and market access. Each of these was executed through either self-funded APAL projects or Horticulture Innovation Australia funded activities.

Keywords

Industry Development, Industry Leadership, Key Stakeholder Roundtables

Introduction

The Roundtable was designed as an annual think tank for the apple and pear industry to reflect on recent performance, consider value added improvements in the industry's focus and operations and contribute to a more cohesive and outward looking industry.

The Roundtables provide leading growers an opportunity to learn different views from those gathered during other consultation channels: the grower roadshows, annual levy payers meeting, biennial conference and various events like Future Orchards. The format, content and outcomes are differentiated by the strategic and themed approach to the event.

It was during the 2012 roadshow that a number of key stakeholders expressed a desire to engage in a roundtable discussion with their peers to debate industry priorities and solutions. Joint participation not only encourages lateral thinking but also gives greater mutual ownership of the outcomes.

A think tank type arrangement was believed to better enable the industry's leaders to generate ideas and devise creative solutions to the opportunities and threats facing the industry.

The roundtable concept was supported as the group was considered too large to operate effectively via teleconference and is too geographically dispersed to meet on a less formal basis.

In 2012/13 APAL piloted the "Key Stakeholders Roundtable" – a series of meetings and teleconferences that brought together the industry's principal business owners and leading decision makers. Following the success of the pilot, this project sought to formalise the Apple and Pear Key Industry Stakeholders Roundtable (the Roundtable) meetings for three years.

The Roundtable differs from the Grower Roadshows which are twice yearly regional visits. Traditionally this industry consultation mechanism involves one on one meetings between the APAL Chair and CEO with a cross section of stakeholders (from large and small businesses) in each production region. These structured series of visits enables the industry representative body to gain "grass roots" feedback on business issues, the investment of all levies, R&D priorities, and industry trends. These liaison visits are deliberately held on a one-to-one basis or in very small groups to provide for a full and frank exchange of views. As such there is little opportunity for group discussion and group decision making amongst the industry's biggest growers and packhouses.

The Roundtable offers an additional but unique means by which industry "thinking" can be harnessed to seize opportunities and help drive the industry's strategic goals.

Whilst the strategic plan New Horizons and the Strategic Investment Plan outline the key strategies required to achieve improved industry profitability, there is acceptance within both documents that the industry itself must also help drive initiatives. Harnessing the efforts of those with the most "skin in the game" will more likely drive uptake of specific actions that can help deliver the strategic plan.

In line with the above, the objectives of AP13036 '*Industry Roundtable Forum*' was to provide an opportunity for:

- the largest growers/packers to meet jointly to discuss business issues and tactics to drive implementation of the Strategic Plan;
- industry to reflect on recent performance, consider value added improvements, and debate opportunities for improved industry profitability and longer term expansion;
- the industry representative body to ascertain the views and aspirations of those with the “most skin in the game” to balance ideas generated through traditional channels (such as grower roadshows and APAL Board discussions);
- contribute to a more cohesive and outward looking export focused industry.

Methodology

During the annual 2012 regional grower visits a number of key stakeholders expressed a desire that APAL facilitate an industry roundtable to enable peers to debate industry priorities and solutions and help drive the implementation of the industry Strategic Plan. APAL subsequently funded a pilot to road-test the roundtable concept in January 2013. This event, and subsequent teleconferences, enabled the industry’s largest growers and largest packing operators to commit to working together to identify strategic initiatives that would help drive the industry to improved profitability and expansion.

This project provided the funding to support the Roundtable for a three year period. However an earlier end date was established following the transition from Horticulture Australia Limited to Horticulture Innovation Australia. Funding enabled two Roundtables - in July 2014 and June 2015 – with a number of teleconferences between major events. These “think tank” type summits aimed to harness the lateral thinking of the industry’s key decision makers to jointly develop high level strategies and specific actions to address one or more of the most pressing opportunities and/or threats facing the industry.

APAL identified the top 20 to 25 growers, packers and supply chain operators of the apple and pear industry and invited them to participate in the Roundtables. They represented the key business leaders, decision makers and innovators from all Australian apple and pear production regions, and include the largest growers, packers, exporters or marketers of apples and pears. Combined, they accounted for 60-70% of Australian production, and a greater share of packhouse throughput.

The agenda for both Roundtable events and associated teleconferences was developed by APAL on the basis of:

- consultation with a number of the Roundtable members;
- the deliberations of the pilot Roundtable operated in January 2013;

- items raised in discussions held with a cross section of growers during the twice yearly regional visits undertaken by the APAL Chair and CEO

The first Roundtable was held on 24 July 2014 with 24 participants. Presentations were made in regard to truth-checking industry statistics; exporting; retail trends in the apple industry, and national branding in an international context. The Roundtable agreed on a number of priority issues including improvements to Infopome, development of a variety information matrix, increasing exports and the provision of Aussie Apple quality guidelines.

The second Roundtable was held on 25 June 2015 with 19 industry participants. The focus was on exports: in the face of a declining demand, a likely long term excess supply of Cripps Pink and real import threats. It is imperative that the industry export to grow. Roundtable discussions focused on the industry's continued opportunistic approach to export is dependent upon domestic apple and pear prices and the need to change the culture of the industry to export "thinking".

Outputs

The outputs from the project have included:

- Two Roundtables bringing together key stakeholders – 20-25 of Australia's largest growers and packers;
- Identification and prioritisation of the specific issues that relate to the major opportunities and threats that face the industry in achieving medium to longer term sustained profitability;
- Identification and prioritisation of the industry preferred strategies and actions to address the aforementioned opportunities/threats;
- An allocation of next steps for industry and APAL to advance the identifies strategies and actions;
- Feedback provided to the APAL Board and the IAC (and relevant subcommittees) to progress actions;
- An article in Australian Fruit Grower magazine summarising the key outcomes of the summit for dissemination of learning points to the wider apple and pear industry growing community

Outcomes

The overarching outcomes of the project include enhanced understanding by the APAL Board and the Apple and Pear Industry Advisory Committee (IAC) and its sub-Committees of the priority needs

and strategic aspirations of the industry's key stakeholders.

The annual summits, magazine articles and feedback to advisory committees have:

- Helped guide future investment of the R&D and marketing levies and more informed portfolio and investment management;
- Assisted APAL to fine-tune its non Hort. Innovation funded service provision to better meet industry needs and priorities;
- Better enabled the APAL Board and the Apple and Pear IAC to review the industry strategic plan and the industry strategic investment plan

More specifically, this project aligned with the enabling objective of the industry Strategic Plan that seeks to ensure industry has the resources and capability to achieve the primary objectives of stimulating domestic demand and expanding exports. For example, this project addressed the following specific components of the enabling objective:

1 Adapt industry services to meet changing needs of growers

For example, Roundtable recommendations included the need for:

- A variety register.

APAL subsequently undertook the necessary research to compile a list of all available and emerging apple and pear varieties in Australia. This has been made available to growers and is updated annually:

<http://apal.org.au/apple-pear-variety-register/#sthash.8VEvu9Nw.dpuf>.

The aim of the registry is to provide an independent overview of the varieties to help apple and pear growers become fully aware of the depth of what is on offer. The registry enables readers to see the basic information on each variety such as appearance, origin, harvest date, crosses as well as the current marketing arrangements in place. Over many years the variety makeup of Australia's apple and pear industry has been continuing along one steady pathway with the main varieties being 'Cripps Pink', 'Gala', 'Granny Smith' and 'Fuji'. These varieties dominate the varietal mix in planted orchards today. However, there are many new varieties (such as Jazz™) coming into play and some that have yet to be commercialized.

- Tree Registry

Roundtable members identified the importance of knowing what proportion of Australian orchards are already planted and being planted to different varieties to help growers and the supply chain better plan for the future. Getting a grip on basic tree data was considered fundamental to making sound business decisions (about what to plant or often what not to plant) and sound decisions around marketing and sales channels (identifying potential over supplies). The Roundtable deliberation on this issue was provided to both the APAL Board

and to the Apple and Pear IAC. The latter subsequently agreed to fund from R&D levies a project to capture the data, create an online Tree Registry database and produce a robust industry crop estimate in 2015. The project was funded (HAL project AP13035 'Apple and Pear Industry data collection').

- Driving Exports

Roundtable members identified the importance of:

- Redrafting of the export strategy - nearing completion;
- Tariff data for each of the major markets – this was collated and lodged on the website: <http://apal.org.au/supply-chain/trade/export-markets/>
- Undertaking collaborative cross product market development. The Now In Season program which was managed by the Victorian Government with assistance from APAL, was undertaken in 2015 to promote pome and stone fruit, cherries, citrus and table grapes in selected ASEAN countries (Indonesia, Thailand and the Philippines) under the Australian brand;
- Assisting the Victorian Government for an In-bound Asian buyer trade mission - completed;
- Continued participation by APAL in meetings and teleconferences of the Office of Horticulture Market Access and the Department of Agriculture to continue to push for an improvement in the protocol for apples into Canada, improvement in the Tasmanian apple protocol into Japan, market access for mainland apples into China and market access for mainland apples, pears and Nashi into Taiwan.
- Arranging inbound visitations by officials and semi-officials from export or potential export countries – completed, with Madame Guo, an advisor to China Inspection Quarantine Association (CIQA), visiting Radevski orchards and meetings at the APAL office.
- Continued participation by APAL in meetings with officials influencing access in export target markets – APAL met with General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ), CIQA, Ministry of Agriculture (MoA) and Chinese Academy of Agricultural Science (CAAS) in Beijing to pursue access for mainland apples into China;

- Pack-house cost structure data

Roundtable members sought a better understanding of grading and packing costs. Whilst acknowledging that Australia has several “state of the art” pack houses, the industry is believed to be populated by too many sheds which are characterised by ageing equipment and throughput that is too small to be economic. There is consensus that evolving supermarket requirements will place greater demand on specifications that require defect sorters, superior size management, custom runs, and flow wrappers. At the same time supermarkets and exporters are moving to fewer approved suppliers. These factors will combine to put greater pressure on the smaller, less capital intensive sheds and further consolidation is likely.

The Roundtable acknowledged that growers need good data to assist them in benchmarking their shed operations prior to committing to rationalising their packing / cool-store operations. Benchmarking data was also considered key to providing discipline on shed operators who manage throughput for multiple growers – clients can see how the costs they are being charged weigh up against those incurred by competitors.

To address this issue APAL subsequently commenced a self-funded project to establish a base model of shed and cool-store costs and this work is on-going.

- Quality Guidelines

The Roundtable agreed that quality guidelines need to be provided across the supply chain to improve consistency in product that is grown and offered for export and domestic sale. The Quality guidelines have been provided to growers:

<http://apal.org.au/aussie-apples-quality-specs/> .

2 Improve quality and flows of information for decision-making across the supply chain

The Roundtable provided considerable feedback on how and why modern commercial businesses use the monthly cool-store stock reports generated through InfoPome (AP11033). Roundtable participants indicated that in Australia, fruit supply has a much greater influence on fruit price than any other variable. As a result, intelligence about the amount of fruit remaining in cold storage (by variety and state) and a comparison to the amount that remained from the previous harvest, was considered valuable market information for those charged with selling fruit.

Roundtable participants suggested that such data is near impossible for individual operators to collect. The Roundtable also discussed how business decision-making could be improved if Infopome was re-imagined. Recommendations from the 2014 Roundtable included:

- a need to address an automated process to allow weekly reporting of cool store stocks;
- a recommendation to limit data contributions to those cool store operators who can be relied on to regularly contribute data;
- a process to validate weekly data and generate a meaningful weekly stock report;
- a desire to seek stock reports from the major supermarkets to enable some cross-checking against industry inputted data.

On the basis of these recommendations, the APAL Board decided to invest its own independent funds to commission an upgrade of the software that enables packing sheds to enter their data. The upgrade of the software is due for completion by close of month February 2016 with testing and roll-out scheduled for March 2016.

The Roundtable recommendations were also forwarded to the Industry R&D investment advisory panel which subsequently sought and obtained a funding allocation from Hort. Innovation to continue a cool-store stock program. The new project InfoPome 3 (AP15008) commenced 29/10/15 with a focus to deliver more accurate and timely reporting compared to previous projects and will involve regular analysis to draw out critical messages which will improve decision making as part of the reporting process.

3 Invest in leadership and people development

The Roundtable is itself an investment in industry leadership. Industry Roundtable Forum (AP13036) brought together for the first time, the 20-25 largest growers/packers in one place to ensure they could have a joint conversation about the industry, where it is heading and how they could individually, but more importantly, collectively, seize the opportunities before them. Peer interaction was specifically targeted to achieve:

- a) appropriate representation. With over eight growing regions spread across the country, many leading growers do not know each other (or at least well);
- b) a means of generating and sharing ideas, challenging thinking and building some consensus or prioritisation of the key issues;
- c) building trust. The industry is highly competitive and lacks alliances across growing regions. Alliances are considered important as a strategic pathway for the growth of export sales;

At the July 2014 Apple and Pear Key Stakeholders Roundtable renewed commitment was sought from the industry's largest operators to place 2 containers each into export markets over the coming twelve months.

It is imperative that the industry export to grow but there remains an opportunistic approach to the development of international markets, dependent upon domestic apple and pear prices. There is a need to: change the culture of understanding around the importance of long term relationship building with buyers; build a brand; foster an ability and willingness to supply consistently across seasonal windows and on a scale that retailers require; target the right markets; and develop partnerships with other growers (neighbours and internationally) to add export strength and lower costs.

The agenda at the 2015 Roundtable initially painted the picture of a declining demand, likely excess long term supply of Cripps Pink and real import threats. A draft Export Strategy responded to key lessons for apple and pear growers/exporters: what is different about this industry that inhibits export growth? Similar temperate fruit industries have experienced strong export growth and are successful – why? The discussions resulting from these presentations helped refine the Export Strategy for final submission to the Department of Agriculture and Hort. Innovation (Trade division).

A wrap up session brainstormed the next steps and specific action items needed to provide a

pathway forward.

The key stakeholders that participated in both Roundtables command respect from within the industry by virtue of their individual volumes and by their leadership stature. Consequently they have a significant capacity to influence other growers, packers and service providers operating across the apple and pear supply chain.

Influence is important in an industry that is fiercely competitive by nature. Moving forward to fully implement the industry strategic plan requires a shared vision for the future and a willingness to take joint responsibility. These sentiments are echoed from the Industry Strategic Plan.

Shared visions are also required for more tangible activity, like building a Team Australia approach to exports.

The Key Stakeholders Roundtable has slowly built trust and confidence amongst the leading growers and supply chain operators. In turn this should start to remove areas of competitiveness and individualism where cooperation and collective action is required.

The Roundtables have provided a safe and confidential space for leading industry stakeholders to share opinions and concerns about the apple and pear industry's forward pathways; to generate the right questions; and, provide opportunities for brainstorming alternative ideas and solutions.

Therefore the project has also:

- Strengthened the collegiate approach to industry advancement: establishing considerable goodwill amongst the industry's prominent leaders to work collaboratively; breaking down the barriers in a highly competitive environment is essential to greater adoption and uptake of actions and activities to achieve the industry strategic plan;
- Demonstrated to the wider apple and pear industry that business leaders are prepared to seize opportunities and tackle industry threats in the interests of the "industry greater good" - not just in a corporate commercial and ad hoc way. This in turn helps build confidence in the industry and provides guidance to those smaller businesses seeking to make positive changes for a sustained profitable future.

This project will help shift the industry closer toward the ultimate goal of:

- Gaining market access for mainland Australian apples into China. The time frame to achieve market access is within the next 2-4 years.
- Continued growth in exports of apples from Tasmania to China;
- Gaining market access for mainland Australian apples and pears into Taiwan. The time frame to achieve market access is within the next 2-4 years;
- Identification of whether an access pathway for mainland Australian pears into China should be pursued;

- Continued growth in exports of apples and pears into Hong Kong, South East Asia;
- The following specific outcomes were generated by the project:
- Development of new contacts and reinforcing relationships with established contacts involved in the importation/retailing of imported fruit in China and other Asian markets;
- New learnings from developing a better understanding of the market “needs and desires” of Trade Fair visitors;
- New learnings from developing a better understanding of what our competitors are offering the market (through Trade Fair exhibitors from competing countries);
- Improved knowledge of short and medium term impediments to Australia gaining access for apples into China (perceived threats to local producers, pest concerns, data requirements);
- Identification of technical requirements and exploration of possible phytosanitary protocols to support trade to China;
- Establish any specific R&D projects requiring immediate implementation to assist in the market access process;
- Sketch an Action Plan for mainland apple access to China – document what needs to be done and when and timeline scenarios;
- Provide input into the export marketing promotional plan

The specific activities and/or programs will be built into both the Strategic and Operational Plans of Apple and Pear Australia Limited. Input will also be provided into the strategic R&D investment and marketing plans of the apple and pear IAC.

Evaluation and Discussion

The apple and pear industry Key Stakeholders Roundtable comprises around 20-25 industry business leaders, decision makers and innovators from all Australian production regions. They are the largest growers, packers, exporters or marketers of apples and pears, accounting for 60-70% of Australian production.

APAL currently manages a number of consultation channels: the grower roadshows, annual levy payers meeting, biennial conference and various events like Future Orchards. However there has been no single opportunity for the largest growers and largest packers/marketers to come together from across the country on a regular annual basis.

It is important that the Apple and Pear Industry Key Stakeholders Roundtable members meet regularly and at least once per annum because:

- Funding for both research and development and marketing are constrained and prioritisation of industry needs is required.
 - The deliberations of the Roundtable group have in the past and continue to feed into the decision making of the apple and pear R&D and marketing advisory committees as well as into the APAL Board;
- The Roundtable offers a different perspective than is gained from meetings with the APAL Board and IAC (and its sub-committees).
 - Members of these Boards and committees are representative of small and medium-sized enterprises (SMEs) which make up the majority (by number of enterprises) of the industry. In contrast, the Roundtable participants account for the businesses producing the largest volumes which either operate larger or multiple holdings and/or pack and market product from a number of suppliers.

The participants in the Roundtable were asked to evaluate the 2014 Roundtable. Critical success factors include:

- the participants were well briefed;
- the summit was well facilitated;
- participants were engaged and were able to contribute at a strategic level to the industry analysis;
- issues relating to one or more opportunities /threats were identified and articulated;
- strategies and actions are identified and next steps (and responsibilities were apportioned);
- participants valued a collegiate approach;
- participants recognised and value the outcomes that were achieved at and between the summits

The Roundtable also sought to review its composition, structure and format. During the Roundtable membership was relatively exclusive to limit the number of voices to those with “most skin in the game”. However the APAL Board was invited to participate in the 2014 event. The Roundtable group is too large to operate effectively via teleconference but is too geographically dispersed to meet on a less formal basis. A think tank type arrangement has enabled the industry’s leaders to generate ideas and devise creative solutions to the opportunities and threats facing the industry. Joint participation not only encourages lateral thinking but also gives greater mutual ownership of the outcomes.

On the one hand the largest growers and largest packing shed operators have the most to lose from poorly targeted industry activity. On the other hand, harnessing the efforts of those with the most “skin in the game” will more likely drive uptake of specific actions that can help deliver the

industry's strategic investment plan.

Discussion points raised included: In regard to the future of the Roundtable, comments made at the 2014 and 2015 events included:

- General consensus - Keep Roundtable as industry gains confidence by meeting with each other;
- Industry needs to have a platform.
- Might vary the format somewhat but need it.
- An enjoyable learning forum of major growers.
- Twice per year is good.
- APAL to determine time – allowing the time but ensuring enough time to address the issues
- Have pre-questions circulated regularly to feel closer to get collaboration.
- All happy for APAL to facilitate.

Recommendations

Communication from Hort. Innovation (5 August 2015) indicated that AP13036 had been reviewed against the Statutory Funding Agreement (SFA) and a decision had been made to:

- bring the end date forward;
- Hort. Innovation will seek grower advice on whether this is a program growers want to support with levy funds in the future.

Given the positive, strong and tangible outcomes from the project and an expressed desire from leading growers, packers and exporters, a path forward to continue funding the Roundtable is being sought.

Appendix 1: 2014 Key Stakeholder Roundtable Summary

Date: Thursday 24 July 2014

Venue: Shepparton Victoria

The Key Stakeholder's Roundtable was convened a day prior to the Apple and Pear 2014 Industry Summit.

Chaired by John Lawrenson, the Roundtable comprised 24 participants: Owen Carter, Chris Georgopoulos, Fiona Hall, Garry Parker, Tim Nethersole, Howard Hansen, James Walters, John Power, James Ryan, Michael Russo, Rob Cathels, Scott Dunk, Mark Joyce, Rosie Savio, Phil Turnbull, Scott Montague, Greg Mouat, John Dollisson, Kevin Sanders, Scott Price Jason Jarvis Annie Farrow and Claire Fitchett. Only ten of the original 22 Roundtable Stakeholders from the 2013 pilot were able to attend the event, with many overseas on business or on leave.

A dinner speech was given by Howard Hansen on his export experience. During the Roundtable presentations were made by J Dollisson (CEO, APAL) on truth-checking industry statistics; by Paul Swan (The Works) on retail trends in the apple industry, and by Freya Campbell (Austrade) on national branding.

Appendix 2: 2015 Key Stakeholder Roundtable Summary

Date: Thursday 25 June 2015

Time: 2.30pm – 5.30pm

Venue: Coolangatta Room, Jupiters Gold Coast, Queensland

The Key Stakeholder's Roundtable was convened a day prior to the APAL – Ausveg 2015 Horticulture Conference.

Chaired by Dr Michele Allan (APAL) there were 19 industry attendees including: Owen Carter, Andrew Plunkett, Scott Montague, Don Ymer, Howard Hansen, James Walters, Jimmy Kalafatis, John Power, James Ryan, Scott Dunk, Joe Ceravolo, Mario Casotti, Paul Good, Phillip Flavell, Dino Rizzato, Chris Fairless, Trent Vedelago, Rosie Savio, Phil Turnbull. Two APAL representatives (Farrow, Tait) and the New Horizon's Scholar (Thomas Griggs) attended as well as discussion leads Tim Goodacre (Scales Corporation NZ, Mr Apple) and Tania Chapman (Citrus Australia).

The major innovation compared with previous Roundtable event, was the focus on the export *mindset* of Australia's leading apple and pear growers. It is imperative that the industry export to grow but there remains an opportunistic approach dependent upon domestic apple and pear prices. There is a need to change the culture of understanding around the importance of long term relationship building with buyers, brand building, an ability and willingness to supply consistently across seasonal windows and on a scale that retailers require, targeting the right markets and developing partnerships with other growers (neighbours and internationally) to add export strength and lower costs.

The Agenda sought to initially paint the picture of a declining demand, likely excess long term supply of Cripps Pink and real import threats. The draft Export Strategy was then described, highlighting the positive opportunities open to the apple and pear industries. Seizing and securing those opportunities will require on-going supply commitments, relationship building, and market development and marketing and in some cases, increased market access effort.

Citrus and table grapes have experienced sizeable export growth in recent years. The NZ apple industry continues to transform and is a focussed, formidable and fearless exporter. Many of these industries face the same labour costs and compete with produce from the same suppliers – South Africa, Chile, and USA - in the same competitive markets in Asia, Middle East, Europe and North America. Panellists including Tim Goodacre and Tania Chapman informally explored what lay behind their success and what might be different for Australian apple and pear growers / exporters. Tim Goodacre, Chairman of New Zealand's Mr Apple, indicated that he thought the NZ kiwifruit model was a better one for Australian apple and pear growers to follow than the NZ apple industry.

The discussions resulting from these presentations have helped APAL to refine the Export Strategy which is being finalised.

A number of action items also arose:

- report on allocation of marketing funds to exports – to be undertaken upon the formation of an apple and pear marketing advisory panel.

- what quantity of pears do we export to NZ now and can the protocol be improved? – to be undertaken as part of the Export Strategy.
- all Roundtable members read the draft export strategy and provide feedback.
- advise Key stakeholders of HIA review of this project (AP13036).

In seeking feedback from participants on the usefulness of the Key Stakeholders Roundtable there was general consensus to retain the Roundtable as industry gains confidence by meeting with each other; it provides a platform or forum for major growers. Some suggested that twice yearly meetings would be appropriate but the format could be changed and sufficient time to address all of the issues was required.

Minutes were circulated to both Key Stakeholder Roundtable Members and APAL Board on 14 September 2015. These confidential (export sensitive) notes are available to interested growers and exporters from APAL.