

Final Report

Cherry trade development project 2022-2025

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Public summary

The Australian cherry industry is Australia's fourth largest horticultural export sector by value, with exports valued at \$86 million to the Australian economy during the 2023/24 season (Australian Horticulture Statistics Handbook 2023/24). The industry has long held ambitions to increase the volume of cherries exported to international markets, and this project was designed to support that goal.

The project aimed to support growers by providing both practical assistance for managing the day-to-day requirements of export compliance, and strategic support for market development opportunities. The project was guided by a project reference group, the Cherry Growers Australia (CGA) Board of Management, and direct industry input. Broadly, the project was structured into several key components, including:

- Day-to-day export support, providing practical advice to growers on a range of issues such as regulatory compliance and access to information to support informed decision-making. This was in part delivered through an export helpdesk, as well as materials shared on the CGA members only area of the website. A key element of this practical support was the management of the registration for export accreditation for mainland growers on behalf of the Department of Agriculture, Fisheries and Forestry's (DAFF), and support for Fruit Growers Tasmania (FGT) to deliver this service in Tasmania.
- In-market promotional activities to raise the profile of Australian cherries in key export markets. This support was particularly valuable during the harvest period, when growers are heavily focused on production and have limited capacity for international marketing efforts.
- Representation of the export industry through a unified voice, including at key stakeholder forums such as the DAFF's, Horticulture Export Industry Consultative Committee.
- Providing timely market intelligence reports on key export markets, including export volume information to help keep growers informed during the season.
- Provision of an enhanced communications capacity, to ensure key updates and information is delivered to all growers.

During the project, total exports of Australian cherries grew from 2,869 tonnes in the 2022/23 season to 4,410 tonnes in the 2024/25 season. While these short-term trends are promising, longer-term data (over 10 years) shows that export volumes remain variable and are largely dictated by weather conditions. Nevertheless, over the lifespan of the project, the total area accredited for export has increased, suggesting that growers are confident in the export opportunity and are making commercial decisions to expand this part of their businesses.

The project delivered several new outputs and resources for growers, including but are not limited to:

- An updated Cherry Export Manual, and supporting materials, reference guides and webinars
- Weekly export statistics for growers to help make informed decisions on export markets
- Reports on priority markets, and intelligence from tradeshows and launch events
- An importer database to distribute leads from in-market activities delivered and supported by the project
- Access to Maximum Residue Limits information and crop monitoring recourses
- An updated Cherry Export Strategy 2025 – 2030

These resources were made accessible via the Cherry Growers Australia members only website, email newsletters, the CGA YouTube channel, or in-person workshops.

Keywords

Cherries; Export; International Trade; Trade Development; Market Access; Market Improvement; Protocol Markets; Export Readiness, Australia, Horticulture

Introduction

As outlined by the 2020–2025 Export Strategy, the Australian cherry industry has a long-term ambition to export a greater share (30% to 50%) of total production to international markets. This project was conceived with the intention of supporting this objective. The primary drivers for increasing export volumes include strong international demand for high quality Australian cherries, particularly around the Lunar New Year period, and concerns about the domestic market's capacity to absorb additional supply.

This project supported the cherry industry's Strategic Investment Plan (SIP) objectives of supporting Demand Creation. As a secondary benefit, this project has also supported the objective of delivering Business Insights to growers.

Due to a range of factors including production challenges, the COVID pandemic, and weather events such as both La Niña and El Niño, these volume based targets have not been met. The structural challenges in achieving the stated goals are best evidenced by the annual Australian cherry production, which has fluctuated over the past several years: 17,403 tonnes in 2022, 15,114 tonnes in 2023, and 18,471 tonnes in 2024 (Australian Horticulture Statistics Handbook 2023/24). This variability in total production directly affects the seasonal availability of fruit for export markets.

Notwithstanding the challenges in meeting these volume based targets, exports remain a valuable, important, and profitable component of the Australian cherry industry. Australian cherries achieve some of the highest prices globally and represent the fourth largest horticultural export industry by value for Australia. During the 2023/24 season, fresh cherry exports were valued at \$86 million to the Australian economy (Australian Horticulture Statistics Handbook 2023/24).

This project built on the work undertaken in previous export focused projects including CY12007: Export Development of Australian Cherries (2012–2015), CY16004: Export Readiness and Market Access (2017–2019), and CY18002: Cherry Market Access and Trade Development (2019–2022). In contrast to previous projects, this project recognised that many growers already had considerable export experience. As such, the project focused not on recruiting new exporters, but on supporting existing growers with the capacity to capitalise on export opportunities.

Between 2022 and 2025, this project supported growers exporting to both open and protocol markets. This support included (but was not limited to) managing registration for export accreditation on behalf of the Department of Agriculture, Fisheries and Forestry (DAFF), operating an export helpdesk, attending international trade shows and launch events on behalf of industry, developing an importer database, providing access to information such as Maximum Residue Limits (MRL) level guidance, export volume data, crop monitoring resources, and export focused workshops. The project also worked with DAFF on behalf of growers, to support the maintenance and improvement of market access for Australian cherries.

A key deliverable in the final year of the project was the 2025-2030 Cherry Export Strategy. This document was produced after wide ranging consultation with growers and industry from all cherry exporting states of Australia. The strategy highlighted 5 key areas of focus for the industry including: embedding an end-to-end focus on quality, market access improvements, branding and promotion, market and production information, and tackling industry structure and cost pressures.

When considered in the context of the broader objectives of the industry, namely increasing the volume of fruit sent to export markets, this project can be regarded as a success, with export volumes rising from 2,869 tonnes in the 2022/23 season to 4,410 tonnes in the 2024/25 season. However, when viewed over a longer timeframe, the average compound annual growth rate since 2014/15 has been just 1.4%, indicating that the Australian cherry industry still has significant room for growth in exports.

Positively, Australian cherry growers continue to demonstrate a strong commitment to exports, with the total area registered for export to protocol markets increasing by 15% over the course of the project. In addition, the industry has recently initiated several important projects that will both directly and indirectly support exports by promoting and supporting the production of high quality cherries.

Methodology

The Cherry Trade Development Project (2022–2025) was delivered by Cherry Growers Australia (CGA), with support from Fruit Growers Tasmania (FGT) and Fresh Intelligence Consulting. In addition to CGA's expertise, the project leveraged FGT's specialist knowledge of export protocols in the pest free area and the trade data and analytical services provided by Fresh Intelligence Consulting. This collaborative approach enabled each partner to contribute specialist expertise in export protocols, trade data, and industry engagement.

The project was guided by a reference group comprising stakeholders from each of the major exporting states, along with observers from the CGA Board of Management and Hort Innovation. The group provided advice and helped identify key industry priorities.

The project worked closely with other Hort Innovation projects, most notably by collaborating with the *Extension and Communication for the Australian Cherry Industry CY22002*. This collaborative approach was important as a mechanism to help update growers on the resources developed by the project, including through the redevelopment of the Cherry Growers Australia website and secure area (developed to share trade sensitive information). The project also supported related research, such as the Victorian Government's traceability project (details available [online](#)).

On a practical level the project could broadly be segmented into day-to-day delivery of services required to ensure the smooth running of the Australian cherry export industry, in addition to longer term strategic deliverables. These day-to-day deliverables included:

- Management of annual applications for the export accreditation process.
- Communication of trade related updates to industry, including updates from the federal and state government agencies.
- Operation of an "Export Helpdesk" for trade related enquires from growers.
- Coordination and delivery of market intelligence reports for key strategic markets, including weekly export volumes during the export season.
- Management of in-bound enquiries from importers interested in sourcing Australian cherries, including the development and maintenance of an export database.
- Acting as the industry's primary point of contact for in-bound market access audits, namely from Korea and Japan and the funding of these audits.
- Delivery of annual regional export workshops.
- Coordinated with key stakeholders, including federal and state government agencies, Hort Innovation, research groups, delivery partners, and cross-industry projects, to ensure the smooth operation of trade and capitalise on market development opportunities.
- Continuous consultation with industry to ensure the project aligned with industry needs and priorities.

In addition to these day-to-day activities, the project worked on strategic initiatives driven by industry priorities. This included:

- Preparation of documentation to facilitate new market access, including submissions to the IMAAP.
- Annual reviews of industry export and strategic development priorities.
- Representation of industry in relevant consultation groups and trade related activities, including Horticulture Export Industry Consultative Committee (HEICC).
- Managing the coordination and delivery of in-market activities in conjunction with the Project Reference Group, Hort Innovation, Austrade, state governments, and other relevant stakeholders.
- Delivery of online trade briefings for target markets.

Results and discussion

The project took place during a time of global economic and international travel transition following the easing of the most severe impacts of the COVID-19 pandemic, which is partially reflected in its outputs.

Initiated in July 2022, the project began during the tail end of the pandemic, a time when travel to China – a top five exporting market for the Australian industry was still not possible (see: *Appendix 5 - Cherry Global Market Trends*). The challenges posed by these limitations are best illustrated in *Appendix 6 - Tradeshow and In-Market Events* which highlights the limited in-market activities conducted as part of this project during the 2022/23 season. However, as outlined from the in-market reporting from 2022 in *Appendix 7 – Thailand in-Market Events*, every effort was made to ensure that the full benefits were extracted from the available opportunities.

In-market activity during the following 2023/24 season showed a significant lift in activity, made possible by the widespread resumption of international travel. This progress is clearly demonstrated in the *Tradeshow and In-Market Events* report (*Appendix 6*). This trend has continued into the 2024/25 season, with the project once again delivering strong international engagement.

The period of reduced travel impacted not only the project's ability to deliver in-market activities but also hindered the industry's capacity to conduct its own business development in international markets. This presented a challenge for export growth.

However, when considered in the context of the project timelines (July 2022 – August 2025), the key industry metrics for success have all trended in a positive direction.

The value of Australian cherry exports has increased from \$66.89 million in the 2022/23 season, to an estimated \$91.22 million during the 2024/25 season (Figure 1). In addition, the total volume of fruit exported has increased from 2869 tonnes during the 2022/23 season to an estimated 4410 tonnes during the 2024/25 season (Figure 2).

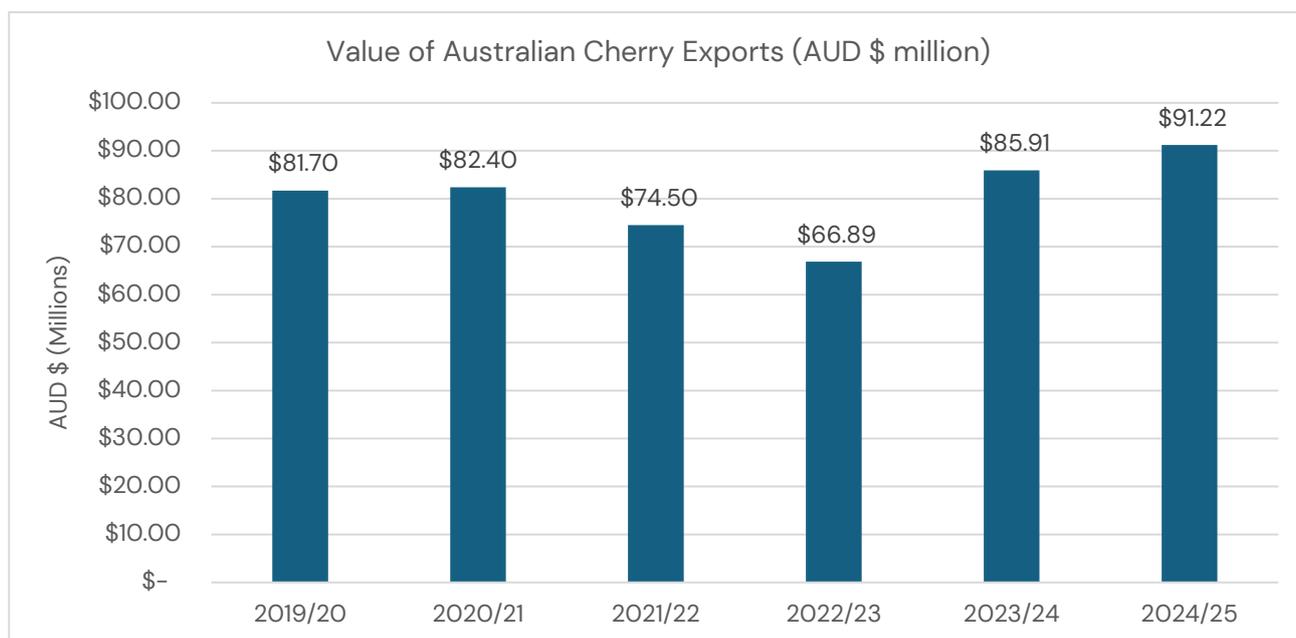


Figure 1 Value of Australian Cherry Exports 2019/20 Season to 2024/25 Season. (Source: Australian Horticulture Statistics Handbook(s), Fresh Intelligence Consulting)

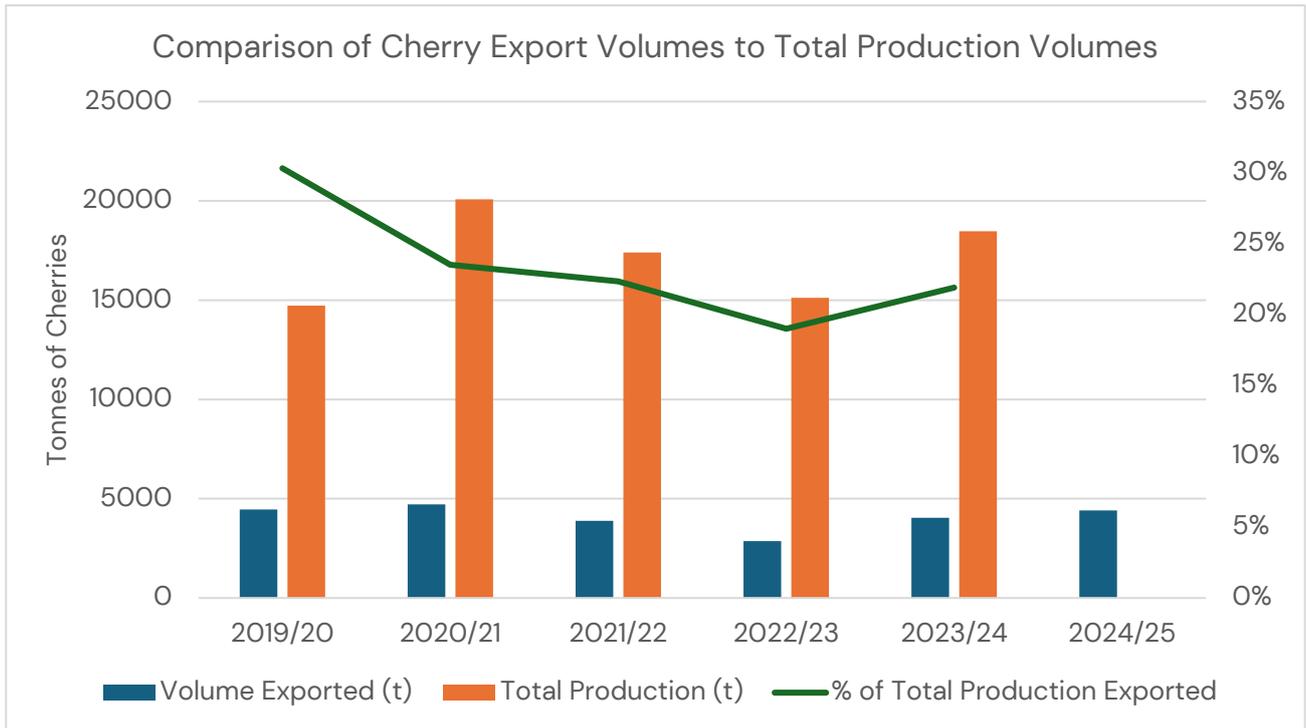


Figure 2 Volume of Australian Cherry Exports 2019/20 Season to 2024/25 Season. (Source: Australian Horticulture Statistics Handbook(s), Fresh Intelligence Consulting)

In addition to growing export volumes and value, another key metric of the project was the number of growers registered for export. While the industry has seen a consolidation in the number of companies engaged in exporting to protocol markets, the total orchard area registered for these markets has increased by 15% over the course of the project (see *Appendix 4 – Export Registration Statistics*). This growth in accredited orchard area highlights that growers continue to see value in exporting to protocol markets, as demonstrated by their tangible financial commitment to maintaining and expanding export capacity.

In addition to an increase in the total hectares registered for export to protocol markets, the number of growers interested in learning about export opportunities has tended to grow over the course of the project. Grower attendance at the seasonal export workshops increased from 72 in 2023 to 82 in 2025.

While the number of growers registered for protocol markets has declined, there is a parallel trend of growers focusing on non-protocol markets. Of the five largest markets — Hong Kong, Vietnam, Taiwan, Singapore, and China — which collectively account for 80 percent of Australia’s cherry exports, only China and Taiwan require grower registration. This suggests that some growers consider the compliance costs to outweigh the potential price premium available in protocol markets.

In summary, all key metrics have trended positively throughout the project. Both the value and volume of trade to export markets have increased. Although the number of companies registered for protocol market export has declined, grower attendance at export workshops has grown, as have the volumes and value of cherries exported. This potentially reflects a level of consolidation within the industry and the appeal of well performing non-protocol markets such as Hong Kong.

Outputs

At the project's inception, a set of outputs was outlined in the Monitoring and Evaluation Plan submitted to Hort Innovation to guide delivery and track progress. The following section outlines the defined outputs and assesses the project's performance in delivering them.

Table 1. Output summary

Output	Description	Detail
Attendance at Export Workshops	<p>The project delivered export workshops in 2023, 2024, and 2025, primarily focused on preparing participants for the export accreditation process. In 2024, the workshops coincided with the Cherry Export Conference, which featured a full day dedicated to export related topics.</p> <p>Overall, attendance at the workshops increased over the course of the project, reflecting growing industry engagement and interest in export readiness.</p> <p>Feedback on the workshops has also been positive from growers.</p>	<p>In 2023, workshops were held in Victoria, New South Wales, South Australia and Tasmania with a total of 72 attendees.</p> <p>In 2024, an online workshop was held with 15 attendees joining. A face-to-face export day was held as part of the national cherry conference in Hobart, attracting 146 attendees.</p> <p>In 2025, workshops were held in Victoria, New South Wales, Tasmania and Online. In total 82 attendees joined.</p> <p>A full breakdown of attendance and some feedback can be found as part of Appendix 10. An example of the workshop agendas can be found in Appendix 11.</p>
Open rates in export information emails	<p>Email is a key communication tool used by the project to engage with growers. Prior to the project's commencement, emails and newsletters were distributed on an ad hoc basis, with inconsistent metric tracking, and limited overall reach.</p> <p>Through the trade project funding, a consolidated email list for exporters has been developed. In addition, open and engagement rates are now actively monitored through Mailchimp email engagement tracking.</p>	<p>A full report is available within Appendix 2</p> <p>Key highlights include.</p> <ul style="list-style-type: none"> - The project has average email open rates of between 64~73% in 2023, 47~64% in 2024, and 45~52% in 2025. - The mailing list subscriber base has grown from 1,213 subscribers in August 2023 to 1,584 subscribers by July 2025.
Access to Secure Section of Website	<p>The secure section of the CGA website is one of the ways that export information is shared with growers.</p> <p>Over the course of the project, the website was redeveloped to improve functionality and accessibility.</p> <p>The latest version of the CGA website can be found at: https://www.cherrygrowers.org.au/</p>	<p>A full report is available within Appendix 2</p> <p>In addition to publishing information on the secure section of the CGA website, key updates are also emailed directly to growers to ensure they have immediate access to the latest information. This includes weekly export statistics during the growing season, importer enquiries, and updates from DAFF.</p>
Review of In-Market Activities and Advice on following Season	<p>Updates from in-market activities are reported to the project reference group and wider cherry industry throughout the season, including through post event reports and the industry newsletter.</p> <p>Based on this information, the activities are</p>	<p>See Appendix 6 for a summary of the in-market events attended and support by the project.</p> <p>The most recent review of the in-market activities was completed as part of a Cherry marketing review day coordinated by Hort</p>

	continually refined with feedback incorporated into both the trade project and market levy projects.	Innovation in Melbourne on 24 March 2025. Examples of the reports from each year of the project are included as appendices, including from Thailand 2022, and Asia Fruit Logistica 2023 & 2024 (Appendix 7,8, & 9). A report on the recent study tour to India is also included as an example of the insights delivered to growers on priority markets (Appendix 12).
Cherry Export Manual	The Cherry Industry Export Manual was updated during the project, most recently in 2024. Work is being undertaken to review this document with an updated version being developed ahead of the 2025 season. This document will be made available online at: https://www.cherrygrowers.org.au/export-manual/	The current version of the export manual was updated ahead of the 2024/25 season. The manual is currently emailed out to interested growers through the helpdesk but will be hosted in the members only area of the website once updates are finalised. See Appendix 3 for a copy or online here: https://www.cherrygrowers.org.au/export-manual/
Market Intelligence reports	On a weekly basis during the growing season, export statistics are provided to growers. The format and content have been refined over multiple seasons, with additional refinements made on an ongoing basis.	During the most recent season the following reports have been made available to growers: <ol style="list-style-type: none"> 1. Weekly Export Statistics from Australia. (Example Appendix 16) 2. Chilean Export Information (Example Appendix 13) 3. Export Season Review (Appendix 14) 4. Global Market Review (Appendix 15)
Registration to protocol markets by state and hectare.	Cherry Growers Australia and Fruit Growers Tasmania are responsible for managing grower registrations for accreditation to export to protocol markets, on the mainland and in Tasmania respectively.	Information related to accreditation for export to protocol markets is recorded by CGA and FGT. Due to the commercially sensitive nature of the information, only a high-level overview of this information is reported to industry. This includes the number of businesses, hectares and packhouses registered by state. A copy of this information is available in Appendix 4.
Cherry Industry Export Strategy 2025 – 2030	The initial Cherry Industry Export Strategy which underpinned this project ran from 2020 – 2025. This project engaged in a grower consultation process, and data analysis to deliver an updated Cherry Industry Export Strategy for 2025 -2030.	A full version of the Export Strategy has been made available to the CGA Board, Hort Innovation, the cherry industry’s SIAP and the project reference group. Given the commercially sensitive nature of the export strategy, a public version of the document is being developed and will be made available in the members only area of the CGA website. See Appendix 1.

Outcomes

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
% exports of marketable yield, nationally and by state.	Increasing the marketable yield that is exported, ties into the SIP Outcome of Demand Creation.	Each year of the project has witnessed an increase in the volume of cherries exported over the prior year, increasing from 2,869 tonnes exported in 2022/23 to 4,410 tonnes in 2024/25.	As outlined by both Figure 2 of this report, and within the 2025 Cherry Export Review, Appendix 14, the total volume of cherries has increased over the lifespan of the project. However, weather events continue to impact overall production which consequently reduces the volume of cherries that can be exported. Managing and understanding the commercial realities of these weather impacts on the industry is the focus of Hort Innovation project, <i>Optimising Protected Cherry Production (CY24004)</i>
Representation on appropriate committees and forums.	Representing the cherry industry on appropriate forums and committees ties into the SIP Outcome of Demand Creation and Industry Supply, Productivity and Sustainability.	The project has represented the Australian cherry industry at industry forums and committees. This representation helps maintain market access and improves industry preparedness for biosecurity and other threats.	All meetings attended by the project from July 2022 to August 2025, can be found in Appendices – 17 to 23.
Record of in-market activities and impact.	Representing industry in-market aligns to the SIP Outcome of Demand Creation.	The project has represented the Australian cherry industry at international trade shows and launch events in key export markets. Representing industry at in-market activities helps promote the industry, driving demand for Australian cherries. This is particularly important when growers are otherwise engaged during the harvest period.	A breakdown of attendance and summary of the launch events and trade shows attended by the trade project can be found within Appendix 6.

<p>Volume and value of export markets.</p>	<p>Increasing the volume and value of cherries that are exported ties into the SIP Outcome of Demand Creation.</p>	<p>Each year of the project has witnessed an increase in the volume of cherries exported over the prior year.</p>	<p>2022/23 saw 2,869 tonnes exported, valued at A\$66.89m 2023/24 saw 4043 tonnes exported, valued at A\$85.91m 2024/25 saw 4,410 tonnes exported, valued at an estimated A\$91.22m (Source: Australian Horticulture Statistics Handbook and Appendix 16)</p>
<p>Volume and value of trade to protocol markets.</p>	<p>Increasing the volume and value of cherries that are exported to protocol markets ties into the SIP Outcome of Demand Creation.</p>	<p>The protocol markets for Australian cherries are China, Japan, Korea, Taiwan, Thailand and Vietnam.</p>	<p>See Appendix 24: Exports to Protocol and Focus Markets (Confidential) for an overview.</p>
<p>Volume and value of trade to “focus” markets identified by the PRG for in-market activities.</p>	<p>Increasing the volume and value of cherries that are exported to “focus” markets ties into the SIP Outcome of Demand Creation.</p>	<p>The key focus markets for Australian cherries are China, Hong Kong, Vietnam, and Taiwan. These are the markets where grower levy funded launch events and in-market activities are conducted. With the addition of Singapore, these five markets account for approximately 80% of Australia’s cherry exports.</p>	<p>See Appendix 24: Exports to Protocol and Focus Markets (Confidential) for an overview.</p>

Monitoring and evaluation

Table 3. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
<p>To what extent has the project achieved its expected outcomes?</p>	<p>Overall, the project has largely achieved its expected outcomes.</p> <p>Export volumes and value have increased across the three years of the project, and the total area registered for export to protocol markets has grown by 15% over the same period.</p> <p>While the proportion of the Australian cherry crop exported has not significantly increased, this is partly due to constraints on export grade fruit caused by adverse weather, as well as growers prioritising the domestic market during periods of high domestic demand.</p> <p>Australian cherries enjoy some of the best market access of any horticultural product. However, several markets remain commercially unviable (for mainland growers) due to cold treatment requirements. Improving access to these markets has been a key industry focus, though progress has been slower than desired. While this is a source of frustration for industry stakeholders, it reflects the complex reality of international government-to-government negotiations.</p>	<p>The project represents a strong foundation for the next trade project commencing from 15 August 2025.</p>
<p>Has the project supported growth in Australian cherry exports?</p>	<p>The project has supported growth in the Australian cherry industry by delivering services and outcomes that individual growers would not be able to achieve on their own. A good example of this is attending in-market launch events during the season, when growers are focused on the harvest.</p> <p>Another example of such support is the delivery of the export helpdesk whereby advice and support is provided to growers, helping them understand the compliance and other requirements of export success.</p> <p>The project has also worked with the Department of Agriculture, Fisheries and Forestry to advise and support market access and maintenance tasks. Examples include helping to facilitate audits from Korea and Japan.</p>	<p>Historically, success in the Australian cherry industry has often been measured by the volume or percentage of total production exported. However, a more meaningful and often harder to quantify indicator of success is the industry's profitability on a per kilogram basis. Ultimately, growers must remain financially sustainable regardless of export volumes, making profitability a critical metric for long term industry viability.</p> <p>When taking a longer term view, export volumes have remained inconsistent, with an average annual growth rate of only 1.4% since the 2014/15 season. This highlights that production constraints (production of export quality fruit) continue to present significant challenges for the industry.</p>

<p>To what extent has the project supported the development of an informed industry that is aware of export opportunities and requirements?</p>	<p>There is a natural division within the cherry industry between growers focused on export opportunities and those who prefer to concentrate on the domestic market.</p> <p>For growers interested in export, a wide range of resources are available. This includes practical advice, an export manual, webinars, workshops, conferences, export data, MRL data, an importer enquiry database among other resources. Support is delivered through multiple channels to ensure maximum engagement and ease of use, including industry newsletters, the CGA website, web and smart phone based applications, the export helpdesk (via email and phone), and industry events.</p> <p>Importantly, these resources are also available to domestic focused growers who are interested in learning more about export opportunities.</p> <p>A key focus over the past 12 months has been an effort to attend a broader range of workshops and conferences coordinated by parallel projects and industry partners, with the aim of engaging directly with growers who have historically not been involved in export. This has helped foster relationships and aims to encourage broader adoption of levy funded export related resources.</p>	<p>International trade is a constantly evolving landscape, influenced by a wide range of external factors and policy shifts. Keeping growers informed of these changes is essential to their continued success. However, given the increasing volume of information available to growers, it is crucial that the content delivered is concise, targeted, and is directly relevant to their businesses, and the specific challenges they face.</p> <p>Continuing to attend grower workshops and events across Australia, is an important way of building connections with industry and should remain a focus for future trade related projects.</p> <p>Rather than pushing new growers to export, the industry should continue to provide support and advice to those growers who are actively interested in export. Export requires a level of commitment that may not be suitable for all growers.</p>
<p>How relevant was the project to the needs of intended beneficiaries?</p>	<p>The scope of this project was extremely broad, providing a wide range of services to growers. Given the diversity of services offered, all intended beneficiaries have benefited from the project to varying degrees.</p> <p>For example, the project supported and facilitated market maintenance and market access activities, which are directly relevant to all exporters. Representing and promoting the Australian cherry industry in export markets during the export season also provided direct benefits to all exporters.</p> <p>A specific illustration of grower engagement is the usage data for the Growfruit App, which was made available to assist with crop monitoring. On the mainland, 45 growers used the app, compared to 43 growers registered to export to protocol markets.</p>	<p>Communication with growers is always challenging, partly due to the remote locations of many cherry farms and the fact that growers spend considerable time working outdoors. While these challenges may sometimes suggest a lack of engagement, usage data from tools like the GrowFruit App demonstrates significant involvement, with all mainland protocol market export growers using this project funded platform.</p>
<p>How relevant was the project in building export capability within the cherry industry?</p>	<p>As originally scoped, the project was designed to build export capacity within the cherry industry and support the development of export markets. In practical terms, this has involved a strong focus on delivering tangible services that enhance export readiness and</p>	<p>While export capability is one important element for a successful industry, it is important to consider the broad range of factors that determine success.</p>

	<p>capability.</p> <p>However, as outlined in the Export Strategy, one of the key barriers to export growth is the availability of high quality, export grade fruit. In this context, the definition of export capability may need to be reconsidered, not just in terms of technical readiness or market access, but in relation to capability to meet production and quality capacity at the farm and post-harvest levels.</p> <p>Some of these issues are expected to be addressed through the upcoming Hort Innovation projects <i>Monitoring Cherry Supply Chain Quality (CY25002)</i> and <i>Optimising Protected Cherry Production (CY24004)</i> which will help build a clearer understanding of quality related constraints across the supply chain.</p>	
How well have intended beneficiaries been engaged in the project?	<p>Cherry growers involved in export, particularly to protocol markets, are very engaged in the services provided through the project. Being a short harvest crop and a highly perishable product, growers are not involved in export consistently throughout the year and as a result regularly seek the assistance of CGA and FGT to answer specific export related questions.</p> <p>However, the seasonality of horticulture and the demands on their time and tight schedules associated with cherry exports during the growing and harvest seasons, growers remained largely focused on their individual businesses during this period.</p> <p>This shaped the nature of engagement, with a preference for succinct and targeted communication. During the dormancy period, growers had greater capacity to engage with the project, enabling deeper and more strategic involvement. It is during this time that many strategic discussions, project reviews, and program planning conversations took place.</p>	<p>The seasonal nature and short harvest window of cherry production shape the industry's engagement.</p> <p>Ensuring the project was clear on required deliverables and grower expectations during the harvest window was key to success, as frequent check-ins can be challenging during the season.</p>
To what extent were industry levy payers engaged in the design, implementation, and ongoing review of the project?	<p>Updates and feedback on the project were regularly provided to and sought from the project reference group. This group comprised growers from each of the major export-growing regions across Australia. Additionally, monthly project status reports were submitted to the CGA Board of Management, which included representatives from each of the state cherry associations in Australia.</p> <p>In addition, 146 people attended the face-to-face export day as part of the 2024 conference.</p>	
Have regular project updates been provided	The project has worked to keep growers informed through several platforms and	

<p>to Australian Cherry growers?</p>	<p>approaches. Specifically:</p> <ul style="list-style-type: none"> - Meetings of the project reference group comprised of the key cherry exporters, to provide direct input into the project design. - Monthly industry wide updates through the “Australian Cherry Industry Newsletter”. - Export workshops timed to coincide with the export accreditation process. - Weekly updates with export statistics during the growing season. - Delivery of an export helpdesk to provide direct support to growers. - Attendance at a wide range of industry events to build relationships directly with growers. 	
<p>To what extent has the project resulted in grower practice change or enhancements in practices to support export activities.</p>	<p>The key way in which the project has helped enhance grower practices is by providing information and insights directly to growers, allowing them to make informed decisions.</p>	<p>Ultimately, growers are responsible for their individual businesses and the operational decisions they make.</p> <p>Rather than directing growers on what to do, or how to run their operations, this project aimed to provide up-to-date, relevant information to support growers in making informed decisions that best suit their individual circumstances.</p>
<p>How accessible were project activities to industry levy payers?</p> <p>Did the project engage with industry levy payers in a way that supported timely and informed decision making?</p>	<p>Every effort was made to ensure project activities were accessible to industry levy payers. Key outputs, such as export figures, were regularly uploaded to the CGA website. When updates were time sensitive, they were emailed directly to registered growers.</p> <p>Project personnel participated in cross project and industry webinars and workshops to keep growers informed about the project’s deliverables and outcomes, including in-person attendance at workshops in key growing regions.</p> <p>Project personnel’s contact information was published on the CGA website. Key mobile phone numbers were widely distributed to growers as part of the help desk.</p> <p>The CGA industry newsletter featured a monthly update with a dedicated section for trade related information.</p>	
<p>What efforts did the project make to improve</p>	<p>The project was strongly focused on delivering</p>	

<p>efficiency?</p>	<p>efficiency, demonstrated in several ways.</p> <p>Firstly, by partnering with knowledge specialists, the project maximised its effectiveness. For example, by collaborating with Fresh Intelligence Consulting, experts in export data analysis, the project delivered high quality export statistical reporting from the outset. Fruit Growers Tasmania, with their expertise on the PFA and related export protocols managed the export helpdesk for Tasmanian growers ensuring specialist knowledge was delivered efficiently. Additionally, the crop monitoring app provided to growers was an off-the-shelf solution with proven capability to meet project requirements.</p> <p>Secondly, whenever possible, the project leveraged partners to support activity delivery. For instance, export workshops were held at free venues hosted by state government partners, saving the project a considerable amount of money to be returned to the cherry fund. The project also worked closely with the Extension and Communication for the Australian Cherry Industry CY22002 project to maximise value for growers.</p> <p>Thirdly, the project aligned deliverables with growers' needs and global export market demands. This approach ensured that outcomes were relevant, practical, and beneficial for the industry.</p>	
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Recommendations

A key component of the final year of the Cherry Trade Development Project, was the delivery of the updated Cherry Export Strategy. This involved stakeholder consultations with growers from every state involved in cherry exports and identified several priority areas for industry focus. The full report can be found in Appendix 1, however in summary the recommendations broadly fall under the following categories:

1. Embedding an End-to-End focus on Quality
2. Market Access Improvement
3. Branding & Promotion
4. Market and Production Information
5. Tackling Industry Structure and Cost Pressures

In part, based on these recommendations, the cherry industry has recently initiated a series of projects aimed at addressing several key challenges identified, including:

- A brand development exercise to develop a national Australian cherry identity.
- Initiated the project *Monitoring cherry supply chain quality (CY25002)*, to help set national fruit quality standards which can be adopted as a baseline in export markets.
- Initiated the project *Cherry Trade Development and Market Access Project (CY24006)*, including a specific focus on quality in export markets and market development activities.
- Initiated the project *Understanding the Environmental Impacts of Cherry Production for Long-Term Sustainability (CY24005)* to proactively research the environmental impact of cherry production, including supporting international exports if carbon emissions pricing is introduced in export markets.
- Initiated the project *Optimising Protected Cherry Production (CY24004)* – an investment to support Australian cherry growers in making informed decisions about investing in protected cropping systems, an important investment for improving quality.

All these investments represent a positive step forward for the Australian cherry industry and will help elevate its position in international markets. In some cases, these investments were overdue, and the industry should be commended for this progress.

However, one area identified in the export strategy that requires greater attention is the implementation of a comprehensive tree survey. Throughout the course of this project, stakeholder discussions have consistently raised concerns about the risk of an oversupply of cherries and the potential impacts this could have on both domestic and international markets.

Although a multi-industry project is currently in place, the core issue remains; the industry lacks an accurate and reliable method for forecasting future production. This gap hampers industry's ability to plan effectively for potential over or under supply scenarios. Without this intelligence, the industry risks being placed in a reactive position, responding to supply shocks rather than proactively developing and securing markets for future production.

Intellectual property

- No project IP or commercialisation to report

Acknowledgments

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