

Final Report

Optimising trade in the Australian vegetables industry

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Optimising trade in the Australian vegetables industry (MT24001)

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Public summary

The global vegetable trade was valued at USD\$48 billion in 2022, with Mexico, Spain, and the Netherlands as leading exporters. The vegetable trade is mainly regional due to the short shelf life of most vegetables and high long-haul freight costs. In the Indo-Pacific region, China and India are major competitors to Australia, with Australia's key exports including carrots, onions, and broccoli/cauliflowers, and a total export value of AU\$251.6 million in 2023¹. A range of challenges, such as fragmented supply chains, cold chain infrastructure limitations, and compliance with high quality standards affect Australia's export potential.

This project aimed to support the Australian vegetable industry understand and adopt best practices to enhance market penetration and trade performance. The work contributed to the development of strategic recommendations to increase export volume and improve the value, volume, and market share of Australian vegetables.

The project's intended outcomes include:

- Increased understanding of Australia's competitive position in a global context, allowing industry to effectively pinpoint and address critical areas related to logistics costs, supply chain management, and government support moving forward.
- Greater knowledge of best practices globally in terms of reducing costs and increasing supply chain efficiency, equipping industry stakeholders with global best practices and tailored approaches to strengthen growth and penetration in target priority markets.
- Clarity on how industry can enhance market penetration and trade performance through practical and actionable guidance and recommendations on strengthening exports.
- Industry uptake of strategic recommendations to increase participation in initiatives and programs, leading to policy changes or new industry practices.
- Increase in export volume through the uptake of strategic recommendations related to market access and improving logistics visibility and efficiency, improving Australian vegetable export value, volume, and market share.

The approach to conduct this study involved four key phases:

- *Phase 1: Mobilisation & Scoping* – set the operating rhythm, aligned on outcomes, and conducted a rapid multi-criteria assessment to prioritise six key export markets in addition to forming a longlist of key competitors for each target export market.
- *Phase 2: Global Competitor Benchmarking Analysis* – part A included analysing the competitor country's export competitiveness, focusing on logistics costs, supply chain management, and government support. Part B involved detailed comparative analysis and case studies, showcasing how each competitor's export competitiveness, within the context of the export market, plays out against Australia. Part C included a capability gaps assessment to highlight Australia's areas of competitive advantage and areas where industry most required updated strategies or support. Stakeholder consultations were also conducted during this phase.
- *Phase 3: Market Factsheets Development* – part A involved the development of a factsheet containing key learnings and best practice from key competitors on improving export competitiveness within the broader context for Australian vegetable stakeholders. Part B included the development of export market-specific factsheets that identified key market success factors for the segments that Australia plays in and provided targeted guidance on how to service these key markets effectively.
- *Phase 4: Strategic Recommendations and Final Report* – produced a comprehensive final report that consolidated insights from Phases 2 and 3, as well as a series of strategic recommendations to grow and improve the competitiveness of Australian vegetables within the global market.

The outputs from this work include:

- Vegetable Exports Competitiveness Factsheet – provided best practice learnings and guidance to strengthen export competitiveness.
- Export Market Specific Factsheets – identified key market success factors for the segments Australia plays in and provided targeted guidance on how to service these markets effectively.
- Final report – containing consolidated insights from Phases 2 and 3, in addition to strategic recommendations.

These documents were provided to Hort Innovation for dissemination at Hort Innovation's discretion.

¹ Hort Innovation | Australian Horticulture Statistics Handbook 2022/23

Keywords

- Australian competitiveness;
- Cost to export;
- Exports;
- Freight;
- Government;
- International trade;
- Logistics Costs;
- Non-tariff measures;
- Policy;
- Regulatory cost;
- Supply Chain Management;
- Supply Chain;
- Tariffs;
- Trade agreements;
- Vegetables;

Introduction

The global fresh vegetable trade has experienced significant growth in recent years, having increased from USD\$40 billion in 2017 to approximately USD\$48 billion in 2022. This has been driven by population growth, rising incomes, and greater consumer focus on health and nutrition. A growing middle class in key export markets is also demanding high-quality, sustainably produced vegetables, creating opportunities for exporters, such as Australia, with strong credentials in food safety and quality.

There are a range of factors influencing the growing interest in fresh vegetable consumption:

- The global population is expected to reach 8.5 billion in 2030, with growth in India, across Africa, and Southeast Asia, with consumers requiring consistent and reliable sources of fresh vegetables. Australia, as a country that can export vegetables year-round and with consistency will be able to continue to capitalise on this opportunity.
- Consumers, especially those in Asia, are shifting to healthier dietary options, introducing and increasing vegetables in their diets – urbanisation, diverse dietary preferences, and growing middle classes in a number of markets, particularly Southeast Asia, further contribute to the global market for fresh vegetables. For example, consumers in Indonesia are increasingly seeking foods that offer benefits in weight management, heart health, and bone/joint health.
- Sustainability is becoming a key consideration, both in terms of stable and sustainable supplies of food, and environmental sustainability considerations – non-tariff measures in the form of packaging, labelling, and traceability are increasing in number. While Australia has strong biosecurity practices and compliance requirements it needs to remain aware and active on negotiating market access.
- Consumers are willing to purchase high-quality produce, and growers are continuously advancing their production and export methods to improve quality – Australian exporters with a reputation for high quality produce can demand a premium in-market, and growing middle classes are increasingly willing to pay for fresh produce over higher volume, lower quality alternatives.

Australia, as a fresh vegetable exporter, faces challenges across logistic costs, supply chain management, and government support:

- Logistics costs – global freight supply has experienced ongoing disruptions since COVID-19, with examples such as drought in the Panama Canal and conflict in the Red Sea that has caused costly rerouting. These disruptions and high global demand for ships and containers have led to an increase in the average global 40-foot container cost from USD\$2,000 in 2023 to USD\$3,331 in November 2024.²
- Supply Chain Management – exporters can face lengthy processes to prepare export documents and required certificates. The extent of documentation required per consignment can incur significant costs that can make vegetable exports less competitive in-market. Australian exporters can miss sailings as a result of lengthy processing times, and time zone differences can make it difficult for exporters operating on the west coast of Australia.
- Government Support – the Australian vegetable industry has limited involvement in trade discussions, with opportunities for stronger engagement that can support the industry in achieving more favourable outcomes. Without consistent maintenance of existing market access agreements and a strong approach to gaining access to new markets, the vegetable industry is at risk of losing market share to competitors' more targeted approaches, such as New Zealand's approach to waiving tariffs with Taiwan and the EU.

Whilst the opportunity in vegetable exports for Australia exists, Australia faces increasing competition from other countries that are able to supply at lower costs, with greater efficiency, shorter lead times, and/or broader market access, highlighting the need to enhance competitiveness across key export enablers.

This project is driven by the need to assess how global competitors strengthen their export competitiveness – through strategies, capabilities, and efficiencies in logistics, supply chain management, and government support – to enable the Australian vegetables industry to identify best practices, identify gaps, and enhance positioning in the global market.

² Global container shipping rates 2024 | Statista

Methodology

A four-phased approach was used to identify key export markets and competitors, with a combination of extensive desktop research and analysis as well as stakeholder consultations. From this, commercially relevant and tangible insights were captured for Hort Innovation and the broader Australian vegetables industry. This methodology involved consultation with stakeholders in the USA, Europe, and Asia, and leveraged credible sources of information and data (i.e., World Bank, UNCTAD, Department of Foreign Affairs and Trade data, Department of Agriculture, Fisheries and Forestry data, Austrade reports, international government trade reports, and freight data).

Phase 1 – Mobilisation & Scoping: mobilised the project by setting an efficient operating rhythm, aligning on project outcomes, and confirming the scope of the project in regards to key export markets, competitors, and vegetable groupings to be the core focus of the project.

Core activities:

- Reviewed previous related Hort Innovation projects.
- Hosted an inception workshop with Hort Innovation.
- Conducted rapid multi-criteria assessments to prioritise six key export markets for further analysis in Phases 2 and 3.
- Identified Australia’s key competitors, forming a long-list of competitors (x3 per export market).
- Hosted Project Reference Group (PRG) workshop #1.

Outcome:

- Identified and developed an understanding of key export markets and competitors.

Phase 2 – Global Competitor Benchmarking Analysis: benchmarked Australia’s vegetable export capability and capacity against the key competitors identified in Phase 1, highlighting Australia’s areas of competitive advantage and areas requiring improvement.

Core activities:

- Part A – for Australia and the 6 competitors, analysed vegetable export competitiveness, assessing logistics costs, supply chain management, and government support.
- Part B – conducted a comparative analysis targeted towards how specific export programs, capabilities, or efficiencies of competitors translate into their competitive positioning within a particular market.
- Part C – conducted an Australian vegetables industry capability gaps assessment, highlighting Australia’s areas of competitive advantage and areas where industry most required updated strategies or support.
- Conducted stakeholder consultations and held second PRG workshop.

Outcome:

- Benchmarked Australia relative to all competitors and understood Australia’s competitiveness versus a key competitor in each target export market.

Phase 3 – Market Factsheets Development: Developed a market factsheets booklet that provides practical insights and actionable guidance for the Australian vegetables industry on how to service target markets.

Core activities:

- Part A – developed a single-page export competitiveness factsheet, providing best practice learnings and guidance to strengthening export competitiveness.
- Part B – for each target export market, identified key market success factors for the segments Australia plays in, and provided targeted guidance on how to service these markets effectively, with reference to competitor successes.

Outcome:

- Understood Australia’s position in target export markets and provided industry with best practice examples and key points of information to increase competitiveness.

Phase 4 – Strategic Recommendations and Final Report Development: Produced a comprehensive final report that consolidates insights from Phases 2 and 3, as well as a series of strategic recommendations to grow and improve the competitiveness of Australia vegetables within the global market.

Core activities:

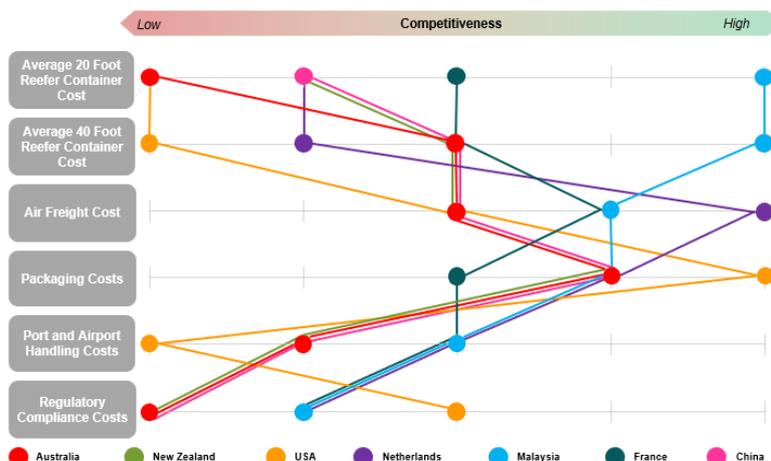
- Developed core strategic recommendations, targeting stakeholders across the value chain.
- Hosted third PRG workshop to test and validate the overarching vision and strategic recommendations.
- Developed a final research report.

Outcome:

- Produced a final report with tangible and practical recommendations that will improve the Australian vegetable industry’s competitiveness in the target export markets

Results and discussion

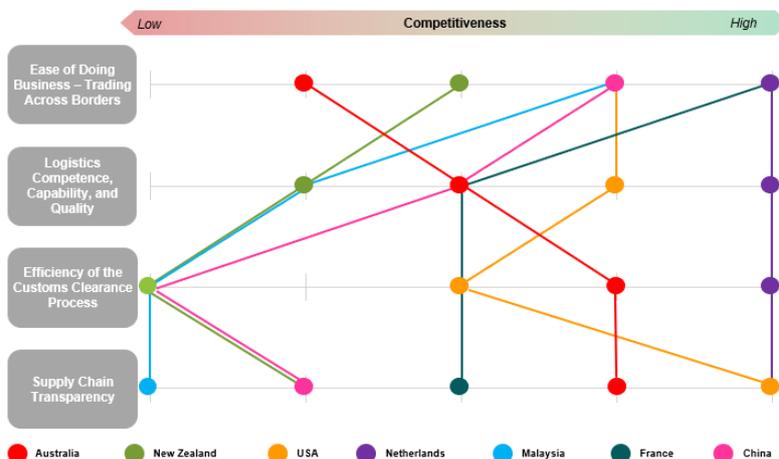
Benchmarking – Logistics Costs



Freight and regulatory costs are the largest component of export costs for Australian exporters, with high freight costs preventing Australians from pursuing opportunities in some markets.

- Australian container costs are typically up 30-50% higher than the global average for 20-foot reefer containers and up to 28% higher for 40-foot reefers.
- The Netherlands has an efficient air freight system, which is nearly 70% more cost effective than the global average. Strong public-private partnerships have enabled the modernisation of Dutch airports and logistics hubs.
- Limited automation at ports and airports in the USA have contributed to high handling costs. The USA is more competitive in terms of regulatory costs, with costs for export certificates capped at USD\$175 per certificate.

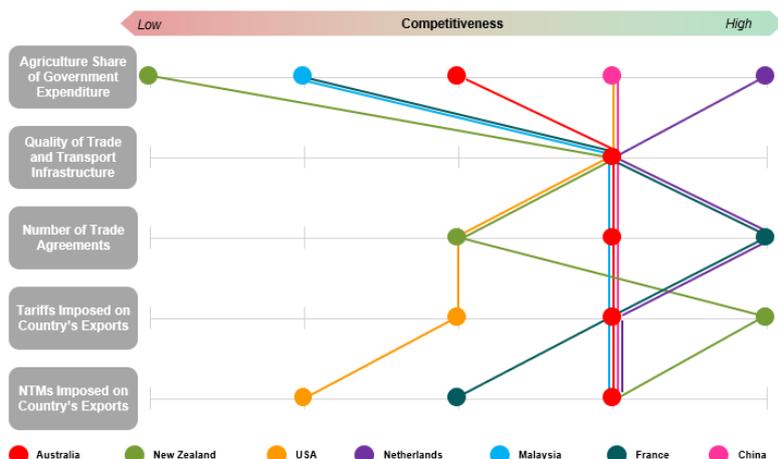
Benchmarking – Supply Chain Management



While Australia has relatively efficient customs processes, exporters are hindered by long documentation processing times and high compliance costs.

- Dutch ports have invested in integrated technology solutions that enable port users to access information and lodge documentation in a centralised location. This has helped to reduce waiting times for exporters.
- Border compliance in the USA typically take four hours and USD\$235 per consignment. Comparatively, Australia’s compliance requirements can cost USD\$1,030 and can require approximately 43 hours of time per consignment.
- Shipping lines often do not provide enough notice on line changes for Australian exporters, which can cause delays in exports. Australia and New Zealand represent a small portion of global shipping revenue, leading to less bargaining power.

Benchmarking – Government Support



Australian trade agreements provide relatively more limited market access and commercial benefits for the vegetable industry compared to selected competitors.

- Government support for agriculture in the EU, particularly the Netherlands, is strong compared to other key competitors. Australia and New Zealand are the least subsidised in terms of value of production.
- While Australia has a large number of trade agreements, they do not always provide the strongest outcomes for the Australian vegetable industry, such as tariff reductions, market access maintenance, and sanitary and phytosanitary requirement reductions.
- New Zealand has effectively negotiated tariff reductions and market access with key competitors, providing New Zealand with a significant advantage against Australia.

Comparative studies

A key competitor was identified for each of Australia’s six priority export markets, developing a pairing for the competitor comparative studies. While the global competitor benchmarking analysis assesses competitors’ performance on a broader vegetable export competitiveness level (market agnostic), the competitor comparative studies target how logistics costs, supply chain management, and Government support play out in reality against Australia in priority export markets, and overall how it contributes to export performance. The six comparative studies are outlined below.

Executive Summary | Competitor Comparative Studies

Comparative studies identified and analysed successful models and best practice learnings from competitors, showcasing effective strategies to enhance export competitiveness

Trade Overview	Key Learnings
Australia vs. Malaysia in Singapore Malaysia holds 60% fresh vegetable market share by value in Singapore, outcompeting Australia's 8.35%, with AUD\$211.9M in exports in 2023.	Malaysia has a longstanding relationship with Singapore and a strong market presence, underpinned by centralised support for Malaysian exporters, through the Malaysia External Trade Development Corporation (MATRADE), a national trade promotion agency of Malaysia. MATRADE also provides a directory of established exporters that can provide businesses with best practice.
Australia vs. USA in UAE Australia outcompetes the USA in vegetable exports to the UAE, and further opportunities will develop with the recent UAE-Australia trade agreement, although importer reliability may pose as a challenge.	The USA capitalises on brand recognition and USA retailer partnerships that enable vegetable exporters to channel produce through reputable importers and directly into retail. Comparatively, Australian businesses can have issues with sending produce and not receiving payment. These strong USA business connections additionally allow exporters to benefit from local knowledge.
Australia vs. the Netherlands in Indonesia The Netherlands is able to export and transport onions to Indonesia for a lower cost than Australia, with the Netherlands exporting AUD\$18.3 million in onions to Indonesia in 2023.	Advanced agricultural technology, an efficient supply chain, and strong logistical infrastructure allows for more competitive pricing than Australia. Significant investment in Dutch ports, with automated terminals, traceability technology such as Portbase, and a digital twin has allowed the Port of Rotterdam to reduce the time and cost per kilometre to market by 25-35%.
Australia vs. China in Vietnam China exported AUD\$12.1 billion in fresh vegetables to Vietnam in 2023, benefiting from a shared border and significantly lower cost of production.	China's ability to negotiate market access with target export markets has enabled China to export a range of vegetables to Vietnam, whilst Australia only has access for cauliflowers, broccoli, celery, and onions. Stakeholders noted the Chinese Government's support for trade delegations, with the Government typically funding trade delegations and industry trips to events and conferences.
Australia vs. New Zealand in Taiwan New Zealand outcompetes Australia on the export of onions and shallots to Taiwan, with Taiwan agreeing to tariff removal through a trade agreement with New Zealand.	New Zealand is able to effectively form trade agreements that benefit the NZ fresh vegetable industry, with tariff reductions for the export of vegetables to Taiwan, mitigating the impact of tariffs that would otherwise be an average of 18.35% across vegetables. Some New Zealand businesses are encouraged to capture value of trade agreements by leveraging datasets and forecasting and backcasting growth.
Australia vs. France in Spain Australia competes with France on the export of onions to Spain, with France's access to Spain made easier through standard trade processes that reduce compliance time and cost.	France has invested into agricultural sector transformation with a focus on digitalisation, robotics, and genetics. USD\$2.3 billion was committed as part of the France 2030 plan to drive innovation in AgTech, with an additional €34 billion to reduce production taxes and increase support for R&D, training, and development of skills. Maintaining Australia's approach to counter-seasonal onion exports to Spain is an effective approach to ensuring a competitive price point.

Capability Gaps Assessment

The assessment identified sea freight costs, ease of doing business, the number of trade agreements, tariffs on exports, and non-tariff measures on exports, as priority areas requiring targeted support and updated strategies to enhance competitiveness. While addressing costs and supply chain efficiency is essential, the findings also emphasise that market

access remains the key factor in strengthening Australia’s export position. Improving trade agreements and reducing entry barriers will be key to unlocking new opportunities and ensuring long-term competitiveness in global markets.



Outputs

Table 1. Output summary

Output	Description	Detail
MT24001 Export Market Factsheets Booklet	A booklet that provides market intelligence on effectively servicing six identified priority export markets, including case study examples of competitors within the respective market, intended for Australian vegetable industry growers and exporters.	The output of this work is intended to be made available through relevant industry channels. Future steps may involve dissemination via industry bodies to ensure accessibility for growers and exporters. Initial engagement efforts have included stakeholder consultations and discussions with industry representatives to validate insights and recommendations. Further assessment of relevance and impact may be conducted through industry feedback mechanisms such as surveys.
MT24001 Optimising Trade in the Australian Vegetables Industry Report	A comprehensive research report which includes analysis on Australia’s global competitive position and key competitors, existing areas of strengths and areas for improvement, and strategic recommendations, intended for the Australian vegetable industry and Government.	The output of this work is intended to be made available through relevant industry channels. Future steps may involve dissemination via industry bodies to ensure accessibility for growers and exporters. Initial engagement efforts have included stakeholder consultations and discussions with industry representatives to validate insights and recommendations. Further assessment of relevance and impact may be conducted through industry feedback mechanisms such as surveys.

Outcomes

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Improved insight into Australia’s competitive position in the global vegetables trade market, benchmarked against key global competitors.	Capacity Building	Industry has greater insight on how Australia ranks against key global competitors in terms of key metrics that contribute to export competitiveness.	The global competitor benchmarking analysis, highlighting Australia against key competitors in regard to logistic cost, supply chain management, and Government support metrics, has been detailed throughout the final report.
Greater knowledge of market intelligence and best practice on how to effectively service key vegetable export markets.	Capacity Building	Industry has greater knowledge on how Australia can reach priority export markets more competitively.	Insights into the operating environment, market preferences and pricing, regulatory requirements, and logistics of priority export markets, has been detailed in the Market Factsheets Booklet.
Improved understanding on the Australian vegetable industry’s capabilities, including areas of strengths and areas for improvement.	Capacity Building	Industry has an improved understanding on priority areas to strengthening export performance, informed by Australia’s current performance and impact on export competitiveness.	A capability gaps assessment, rating various metrics in terms of impact on export competitiveness, and Australia’s capabilities, has been detailed in the final report.
Clarity on how the Australian vegetable industry and Government can strengthen vegetable export competitiveness and performance.	Capacity Building	Industry and Government have clarity on key pillars to strengthening export performance, and key recommendations to executing each.	Strategic recommendations with specific implementation actions and timeliness, has been detailed in the final report.

Monitoring and evaluation

Table 3. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
To what extent has the project achieved its expected outcomes?	The project aimed to provide an understanding of Australia’s competitive position in the global vegetables market, key areas of competitive advantage and improvement, and how to further strengthen export competitiveness and performance. This was delivered through the development of a global competitor benchmarking analysis, capability gaps assessment, and strategic recommendations.	Improvement opportunities involve developing a tool that can regularly update key metrics assessed in the global competitor benchmarking analysis, providing industry with real time information that is relevant and up to date.
How relevant was the project to the needs of intended beneficiaries?	The intended beneficiaries required a stronger understanding of key areas that can strengthen Australia’s vegetable export competitiveness, and support mechanisms and strategies to build capabilities. The final report provided commercially relevant information and recommendations, and ensured feedback from industry was incorporated.	The scope of this project was on export competitiveness factors such as logistics costs, supply chain management, and Government support, which were identified as key areas of interest by industry. Analysis on other areas/metrics may be further assessed if of interest to industry.
How well have intended beneficiaries been engaged in the project?	Extensive consultation occurred with the intended beneficiaries, including a range of industry stakeholders. A wide range of industry perspectives were understood and considered for the direction of the project.	No improvement opportunities have been identified with regard to engaging intended beneficiaries. If there are particular beneficiaries who would like to express opinion or perspective, contact details could be provided to the service provider in advance.
To what extent were engagement processes appropriate to the target audience of the project?	Engagement processes were appropriate, following Hort Innovation’s Stakeholder Engagement and Consultation Framework.	No improvement opportunities have been identified with regard to engagement processes.
What efforts did the project make to improve efficiency?	A detailed project plan was established at the beginning of the project, and followed throughout the project. Fortnightly check-ins were conducted with Hort Innovation to ensure any questions, challenges, or concerns were regularly addressed. Workshops scheduled with the PRG members were flexible to ensure broad and consistent participation, and virtual delivery methods allowed PRG members to contribute to the project despite working across different time zones.	If PRG members or other stakeholders consulted would like to provide further information, provide opportunities to do so. Additionally, pre-read materials could be provided in the lead up to PRG sessions to allow for productive discussions.

Recommendations

Pillar 1 – Expanding Market Access – expand and secure market access for Australian vegetables globally by reducing trade barriers, leveraging trade agreements, and negotiating protocols with high-value and emerging market opportunities.

- A. **Support awareness/capacity building on existing trade agreements** – for example, with the recently signed UAE-Australia CEPA. As part of this, support Australian efforts to network in-market.
- B. **Negotiate market access and reduce market protocols** – with a focus on optimising existing market access opportunities to accelerate trade outcomes, such as in the Philippines, where 10 different vegetables have market access but only to foodservice and high-end restaurants.
- C. **Negotiate favourable phytosanitary pathways** – such as reductions in gamma irradiation or methyl bromide fumigation requirements for onion exports to Indonesia. Support the development of technical R&D packages to showcase Australia’s sanitary and phytosanitary credentials.
- D. **Negotiate tariff reductions** – particularly in countries such as Taiwan and the EU, where high tariffs prevent cost competitiveness for Australian vegetables.

Rec.	Actions	2025				2026				2027				2028				2029								
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4					
A	I. Develop and deliver CEPA resources				●	Desired Outcome: Create up-to-date resources with practical knowledge on trade agreements																				
	II. Conduct trade visits to the UAE																						Desired Outcome: Build direct connections between Australian exporters and UAE trade stakeholders			
	III. Develop case studies guides																						Desired Outcome: Provide real-world insights and success stories to industry			
	IV. Monitor and implement feedback																						Desired outcome: Continuously update and improve trade agreement resources			
B	I. Identify market access opportunities				●	Desired Outcome: Establish a short-list of existing market access opportunities																				
	II. Develop a case for market access																						Desired Outcome: Build a strong case to support advocacy efforts			
	III. Collect additional data and analysis																						Desired Outcome: Gather the required evidence to support advocacy efforts			
	IV. Engage with key Government bodies																						Desired Outcome: Gain broader market access			
C	I. Identify key commodities of focus				●	Desired Outcome: Establish a short-list of markets/commodities with stringent regulations																				
	II. Develop technical R&D packages																						Desired Outcome: Gather scientific data to support the case for alternative treatments			
	III. Engage with Indonesian Authorities																						Desired outcome: Gain acceptance for trial shipments with alternative treatments			
	IV. Initiate pilot programs																						Desired outcome: Showcase the safety and compliance of alternative treatments			
D	I. Prioritise markets and commodities				●	Desired Outcome: Establish a short-list of high potential markets and commodities																				
	II. Undertake economic analysis																						Desired Outcome: Gather economic analysis to support advocacy efforts			
	III. Collect additional data and analysis																						Desired Outcome: Gather the required evidence to support advocacy efforts			
	IV. Advocate for tariff reductions																						Desired outcome: Gain tariff reductions in key markets/for key commodities			

Pillar 2 – Improving Logistics Visibility and Efficiency – empower the Australian vegetable industry with greater visibility, control, and efficiency across supply chains by strengthening transparency, streamlining processes, and enabling stakeholders to take greater ownership of key processes.

- A. **Develop a digital logistics data platform** – that provides greater transparency into logistics costs such as freight costs, and potential future cost movements.
- B. **Optimise regulatory processes for growers and exporters** – ensuring it is fit for purpose based on the size, location, commodities etc. of the Australian grower or exporter.
- C. **Enable reputable growers/exporters to take on more responsibility of export certification and audit processes** - similar to the model used for Authorised Officers who are authorised to perform certain regulatory functions such as inspecting shipments.

Rec.	Actions	2025				2026				2027				2028				2029								
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4					
A	I. Identify key logistics data metrics with key stakeholders				●	Desired Outcome: Establish a short-list of relevant and valuable logistics data metrics																				
	II. Establish an industry-managed logistics dataset																						Desired Outcome: Gain acceptance and participation from exporters to input key logistics data			
	III. Design and develop a digital platform for users to access logistics data																						Desired Outcome: Develop a digital platform that displays key logistics data			
	IV. Monitor and implement feedback from industry users																						Desired outcome: Continuously update and improve the digital platform			
B	I. Revise cut-off times for export documentation																						Desired Outcome: Establish cut-off times that accommodate all Australian time zones			
	II. Implement NEXDOC into existing regulatory frameworks																						Desired Outcome: Improve administrative efficiency through seamless integration of NEXDOC			
	III. Advocate for more flexibility in phytosanitary requirements																						Desired Outcome: Give exporters discretion to go beyond the importing country's regulations			
	IV. Monitor and implement feedback from exporters																						Desired outcome: Continuously update and improve efficiencies in the export regulatory framework			
C	I. Develop a case for extending export process responsibilities to exporters																						Desired Outcome: Build a case to support greater export responsibilities for growers/exporters			
	II. Propose a risk-based approach to export process responsibilities																						Desired Outcome: Secure DAFF approval to extend management of export processes to growers/exporters			
	III. Develop a framework in collaboration with DAFF																						Desired Outcome: Establish a clear framework with DAFF that defines roles, guidelines and expectations			
	IV. Develop and initiate a pilot program to test the proposed framework																						Desired Outcome: Showcase improvements in efficiency and compliance, with aim of scaling program			

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- Statista
- The World Bank
- Trelleborg
- U.S. Food and Drug Administration
- United Nations Trade and Development
- USDA Foreign Agricultural Services
- World Bank

Intellectual property

No project IP or commercialisation to report.