

## **Final Report**

# **Minimum maturity standards adoption across the table grape supply chain**

**Project leader:**

Jeff Scott

**Delivery partner:**

Australian Table Grape Association

**Project code:**

TG19004

**Project:**

*Minimum maturity standards adoption across the table grape supply chain (TG19004)*

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Level 7  
141 Walker Street  
North Sydney NSW 2060

Telephone: (02) 8295 2300

[www.horticulture.com.au](http://www.horticulture.com.au)

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## Public summary

Through the previous projects *TG17002: Table Grape Supply Chain* project and working with *TG18504: Table Grape Quality Retailer Engagement*, Minimum Maturity Standards (MMS) were established based on consumer acceptability of measurable quality factors. Whilst the roll-out of the MMS commenced in the 2019/20 season through extension to growers and the value chain, more time and support was needed to ensure full adoption, with the aim of improving table grape quality and consistency, leading to an increase in consumer acceptability, and as a result, an increase in consumption and demand. This has been the objective of *Project TG19004: Minimum Maturity Standards Adoption Across the Table Grape Supply Chain*, which has focused on the implementation and adoption of the MMS by the whole table grape supply chain.

Over the last 3 years, Project TG19004 has helped to consistently increase consumer acceptability leading to an increase in consumer demand and consumption of Australian Table Grapes. In addition, during the last 2 seasons, growing conditions have been affected by adverse weather events leading to a reduction in Brix and more variable fruit maturity. This could have led to a significant reduction in consumer acceptance, however, through the core project activities, including in-field testing prior to harvest, in-store maturity monitoring and working closely with the whole supply chain, including growers, suppliers and retailers, whilst consumer acceptance has dropped slightly, the overall performance is strikingly better than if the project activities had not been in place. This demonstrates the benefit of implementing multi-year projects that effectively create a 'grower-push' and a retailer 'pull', thereby enabling the whole supply chain to adopt the MMS and understand the benefits of an aligned industry approach.

This project has also been showcased to other industries, including apples & pears, stonefruit, melons, citrus, mangoes, sweetpotato etc. as an example of an industry taking a leadership position regarding the importance of fruit quality and consistency in order to build consumer acceptance over the longer-term.

Throughout the projects, a Project Reference Group (PRG) consisting of major retailers and grower representatives has been used to guide and steer the specific activities and ensure they continue to meet the needs of industry. Specific objectives for this project were to:

- Drive accountability across all key stakeholders (growers, wholesalers, major supermarkets) to ensure that the new MMS are fully implemented and adopted, resulting in greater consumer acceptability;
- Undertake quality testing (in retailer stores) and to measure impact of change with the launch and adoption of the new MMS across the value chain;
- Continue to drive best-practice across the supply chain from growers to retail through education and engagement mechanisms and drive a positive culture focused on high quality standards for Australian table grapes;
- Build capacity and understanding for quality improvement across the supply chain, with regular feedback provided; and
- Monitor the adoption of the MMS and demonstrate improvements in grape quality and consumer acceptability over time; in addition monitor the consumer behavioural data collected through MT17015 – Consumer behavioural data for fresh produce ([www.harvesttohome.net.au](http://www.harvesttohome.net.au)).

Three key parties service providers that have collaborated to deliver this project include The Australian Table Grape Association (ATGA) (Jeff Scott, CEO), Kitchener Partners (Tristan Kitchener) and Quality Associates (Dr Andreas Klieber).

## Keywords

Consumer satisfaction, Brix, maturity, alignment, retailers.

## Introduction

The quality of table grapes in the Australian market has been an area of focus for the Australian table grape industry. The consumer acceptability of Table Grapes in retail has averaged 79% in the past 3 years of the project, which is a 10% increase from the previous benchmarking period from project *TG17002: Table Grape Supply Chain* project and *TG18504: Table Grape Quality Retailer Engagement*.

Whilst the roll-out of the MMS commenced in the 2019/20 season through extension to growers and the value chain, more time and support was needed to ensure full adoption across the broader industry, with the aim of improving table grape quality and consistency, leading to an increase in consumer acceptability, and as a result, an increase in consumption and demand.

This project has focused on the implementation and adoption of the MMS by the whole table grape supply chain and directly addresses the following Outcome and Strategy of the Table Grape Strategic Investment Plan (SIP) 2017-2021:

- **Outcome 1 Strategy 2:** Identify and develop new and existing domestic market opportunities; and
- **Outcome 2 Strategy 1:** Establish practices to enhance product quality throughout the value chain.

### *Consumer Context*

The previous project was guided by an industry Stakeholder Working Group consisting of the major grocery retailers and main producers, which recommended a retail minimum consumer acceptability target of 80% in June 2019.

The consumer acceptability of Table Grapes at retail averaged 79% over the 2020/21 to 2022/23 seasons. In the 2020/21 season, the target was exceeded for the first time with 88% of grapes exceeding MMS requirements.

Despite two difficult seasons for Brix in 2021/22 and 2022/23 due to challenging climatic growing conditions, grapes exceeded MMS requirements at 71% and 78% respectively. Implementation of the Minimum Maturity Standards (MMS) by the grape industry and retailers resulted in a better performance compared to the previous benchmarking periods which had an average of 69% of grapes exceeding the MMS requirements.

The Nielsen Homescan program showed consistently high consumer acceptability above 80% for the project duration, except in December 2022 when white and red grapes had an acceptability of 70%. The latter was linked to poor seasonal conditions resulting in lowered Brix.

### *Industry Context*

There are around 900 table grape growers operating across Australia's mainland states and the Northern Territory. The industry produces approximately 240,000 tonnes annually on 25,000 hectares, with a gross production value of over \$750 million.

One of the major challenges faced by the industry has been the rapid increase of volume and therefore the need to ensure widespread adoption of the MMS by growers and support by the major supply chains. This proposal has focused upon increasing the take-up of the MMS with growers and major grocery retailers to work with and support the supply chain in adopting these minimum standards. The aim of improving table grape quality and consistency, has been to increase consumer acceptability, and as a result, increase consumption and demand.

The MMS have been published and communicated to all table grape growers. Procedures on how to undertake maturity monitoring have been published and communicated to all table grape growers and is on the ATGA website. Through this project, reinforcement of the MMS, along with monitoring procedures, and continued

education and training by the Industry Development Manager and Industry Development Officer has been undertaken in the extension activities and consultation workshops/seminars. The MMS and testing protocols are included at the end of this submission.

## Methodology

The key components of the methodology were:

### ***Project Planning, Management and Governance***

A project plan was developed detailing the key activities, milestones and outputs over the duration of the three-year project. In addition, a Project Reference Group (PRG) was developed to provide input and feedback to continuously improve the project activities, with the aim to de-risk activities and ensure the objectives of the project were met in full. The Hort Innovation Project Manager was also part of the PRG.

### ***Stakeholder Alignment***

Key to this project was ensuring that all stakeholders fully adopted the new MMS. This required a behavioural change in stakeholders yet to adopt the MMS with change management support. This was achieved through a combination of education and extension for MMS adoption to ensure all stakeholders understood the intent of the project and how it would provide benefit to their business or sector, but also that they understand the concept that improving customer satisfaction will benefit all stakeholders in that ‘a rising tide lifts all boats’.

Stressing the importance of ‘consumer satisfaction’ to drive repeat purchase through increasing acceptability, in line with the agreed MMS, was fundamental to achieve a sustained behaviour change. Retail monitoring data was also used to provide evidence of stakeholder adoption of the MMS and overall industry performance to build consumer acceptability.

In summary, the following activities were conducted over the 3-year project, to ensure the whole grape industry adopted and supported the MMS and the required behaviour changes were achieved:

#### *On-Farm Maturity Monitoring*

On-farm maturity monitoring was conducted by variety and by region, with confidential feedback provided to growers and retailers to inform decision-making and encourage fruit not to be harvest before it is mature. Aggregated data was also provided to industry.

Grower and retailer culture change is most important for this project, and there were two key areas of focus, namely:

- White grape growers in Emerald, which have historically been harvested too early and even the better growers have found it difficult to objectively assess when is the correct time to harvest. Therefore, there was huge benefit in conducting this testing for timing the start of the white grape season in Emerald; and
- Maturity information was provided to growers and retailers to advise them when early fruit is achieving the MMS. This reduced the retail buyer behaviour of wanting to be the first to sell domestic grapes, and provided a clear value-add benefit for the retailers and further justification for supporting the Project Team across the project more broadly.

More specifically the on-farm maturity monitoring was conducted for key varieties and regions to provide retailers with notice of when fruit is mature – i.e. to encourage growers not to pick too early and retailers not to request fruit too early, and thereby keep immature fruit out of the market altogether. Time series data for monitoring was:

- 4 weeks before typical season start
- Weekly monitoring for first 2 weeks and then 3 times per week.

- Regions:
  - Emerald, x3 varieties, for 2 growers
  - Mildura, x3 varieties, for 2 growers
  - Robinvale, , x3 varieties, for 2 growers
- Therefore, total samples required = 180.
- Analysis for 3 graphs per region for each variety, and emailed to all stakeholders after each sampling (i.e. weekly for first 2 weeks and then 3 times/week).

#### *In-Store Maturity Monitoring*

Retail monitoring was conducted in Melbourne stores for ALDI, Coles, Costco and Woolworths for the key public varieties, including Crimson Seedless, Flame Seedless, Menindee Seedless, Midnight Beauty, Red Globe, and Thompson Seedless. In addition, Quality Control (QC) inspection data for the retailers' Distribution Centres (DC) was also aggregated to provide a more informed picture of maturity.

In line with the extensive supermarket sampling conducted from 2017-2020, the project team conducted:

- Sampling as soon as domestically grown grapes were available in supermarkets (October);
- Mystery shoppers to stores to purchase a bunch bag of white, red and black grapes as available;
- At the laboratory analyse a sample of 20 berries for Brix and liking;
- Publish results on-line with new results updated within 24 hours of collection; and
- Weekly updates sent to each supermarket quality specialist/technologist and discussions held with supermarket grape buyers and category managers.

Given the importance of imported grapes to maintaining consumer engagement with the grape category, minimal sampling was also extended through the winter months to include imported grapes.

#### *Retailer DC Sampling Protocol*

All retailers conduct QC inspections at each of their DCs for delivery of grapes from their suppliers. To ensure retailers were consistently and accurately inspecting product, *TG17002: Table Grape Supply Chain*, also developed a 'Retail Sampling Protocol', which was updated as necessary and used to assist retailers with their internal QC inspections. The retailer QC inspection data from ALDI, Coles and Woolworths were shared with the project team. This helped to increase the sample size and accuracy of insights regarding adoption of the MMS.

#### *Monitoring Consumer Acceptability*

It is important to validate that the agreed MMS continue to meet the expectations of consumers regarding acceptability and continue to use the data to gain a better understanding of the influence of seasonal variation on consumer acceptance at retail.

Throughout the project, close contact was maintained with Nielsen regarding *Project TG-19003: Table Grapes Consumer Acceptance & Attitudes* (Homescan Quality Performance Tracker Dec 20 – May 23) to help gauge how well the MMS were being met, as independently judged by consumers. Nielsen *Harvest to Home* data was also used as a reference point.

In conjunction with Nielsen, seasonal updates were provided to all stakeholders in the form of online presentations with recording issued for those that could not attend. This close alignment with related and complementary projects for a huge value-add for stakeholders and well supported.

#### *Monitoring Supplier Performance*

Maturity monitoring was conducted for individual suppliers, with data compiled from the retailers DC inspections. Data was de-identified, with 1 graph per supplier (x5 suppliers), compiled weekly and issued to suppliers weekly (essentially this was the same information that was being provided for each of the retailers).

#### *Implementing MMS Through 'Grower Push' and 'Retailer Pull'*

The focus of project TG19004 was the adoption of the MMS to increase consumer acceptability at retail, with whole-of-industry approach. A push-pull strategy was used, involving a grower 'push' and a retailer 'pull', thereby enabling the whole supply chain to adopt MMS and understand the benefits of an aligned industry approach.

Growers were encouraged ('pushed') to adopt the MMS, largely be driven by the ATGA, which as the industry association and a member of the project team, was well placed to take on this role. The ATGA, and Jeff Scott particularly, has close relationships with table grape growers and therefore the trust and support of growers to implement and adhere to the MMS.

The five major grocery retailers collectively account for 86% of the domestic table grape volume by sales value. This means they were an effective and efficient means to drive behaviour change and provide the required 'pull' for the industry through the key domestic producers. The retailers are an important group of stakeholders given the influence they have over producers, so it was vital to 'help them to help us' by ensuring they are making good quality decisions based on sounds facts and information.

#### *Grower Roadshows*

The main communication to growers was through the Grower Roadshows, as well as industry communication through newsletters, the industry magazine and Hort Innovation.

Grower Roadshows were held once a year around September to October to align with Export Registrations. Locations included were Mildura, Robinvale, St George, Emerald, and Perth. Teleconferencing was used for regions where there are only a small number of growers, such as Carnarvon, WA.

#### *Industry Communication to aid Engagement and Adoption*

All communication was managed by the Project Leader with input provided by each project member as required. This helped to ensure technical accuracy and relevance to the target audience, as well as consistency in tone, messaging and content. Clear linkages were maintained to other Hort Innovation projects and extension initiatives, including *Project TG19000: Building Best Management Practice Capacity for the Australian Table Grape Industry*. The project team utilised Nielsen's *Harvest to Home* data (MT17015) as appropriate and within permitted terms of use to develop reports that were tailored to meet the needs of individual stakeholders from growers through to retailers.

All communication and industry engagement were aimed at driving best-practice across the supply chain from growers through to retailers, focusing upon education and support to drive a positive culture focused on meeting MMS for Australian table grapes. It also drove accountability across all key stakeholders (growers, wholesalers and major supermarkets) to ensure that the MMS were fully implemented and adopted and aligned all stakeholders on increasing the consumption and demand of Australian Table Grapes through improving consumer acceptability.

Due to COVID-19 restrictions, webinars were sometimes held as an alternative to in-person roadshows, with additional communication via the established communication channels (Newsletters, emails and direct conversation, particularly with the major producers). No roadshow will be held during Year 1.

## **Results and discussion**

The key components of the results were:

### ***Project Planning, Management and Governance***

In line with the project plan, which detailed the key activities, milestones and outputs over the duration of the three-year project, a Project Reference Group (PRG) provided input and feedback to continuously improve the project activities, with the aim to de-risk activities and ensure the objectives of the project were met in full.

Milestone Reports were provided as per the project contract with input and guidance provided by the Hort Innovation Project Manager.

PRG meetings were held at the end of each season and the start of the following season. Minutes were issued after each meeting.

### ***Stakeholder Alignment***

Meetings were held with all Retailers and Suppliers every season. These included a review of the past season and explanation of the upcoming season. This ensured that all stakeholders continued to adopt and support the MMS and understood the intent of the project and how it provided benefit to their business or sector, and also that they understand the concept that improving customer satisfaction will benefit all stakeholders in that 'a rising tide lifts all boats'.

Each of the project's key activities will be discussed in turn, in line with the project methodology:

#### ***On-Farm Maturity Monitoring***

On-farm maturity monitoring was conducted for key varieties and regions to provide retailers with notice of when fruit is mature. This encouraged growers not to pick too early and retailers not to request fruit too early, and thereby keep immature fruit out of the market altogether.

The objective was to reduce the incidence of immature fruit being harvested, which would then be rejected at the DCs of any of the major retailers and subsequently ending up in the Central Markets. Ultimately, this fruit would be heavily discounted and reach consumers leading to a dissatisfactory experience that erodes the reputation of Australian table grapes.

Encouraging the industry to take a collective responsibility to self-police compliance to the MMS and understand the impact to all stakeholders if immature fruit reached consumers, worked well. Increasingly, retailers and producers reached out to the Project Team to facilitate collective industry discussions when specific varieties or regions struggled to meet the MMS, particularly during the last two seasons when climatic conditions were challenging. At times, this resulted in a collective decision to adjust the MMS, balancing technical and commercial considerations and the need to meet consumers' expectations.

This approach maintained adherence to the MMS by the broader table grape supply chain and ultimately led to a better performance of the industry.

#### ***In-Store, Retailer DC and Supplier Maturity Monitoring***

In-store maturity monitoring was a key activity to provide specific feedback to individual retailers and suppliers regarding their adherence to the MMS. QC inspection data from the retailers' DCs was also aggregated to provide a more informed picture of maturity. These combined data sets enabled direct comparison of retailer and producer performance on a weekly basis (using de-identified data) with actions taken to address non-compliance.

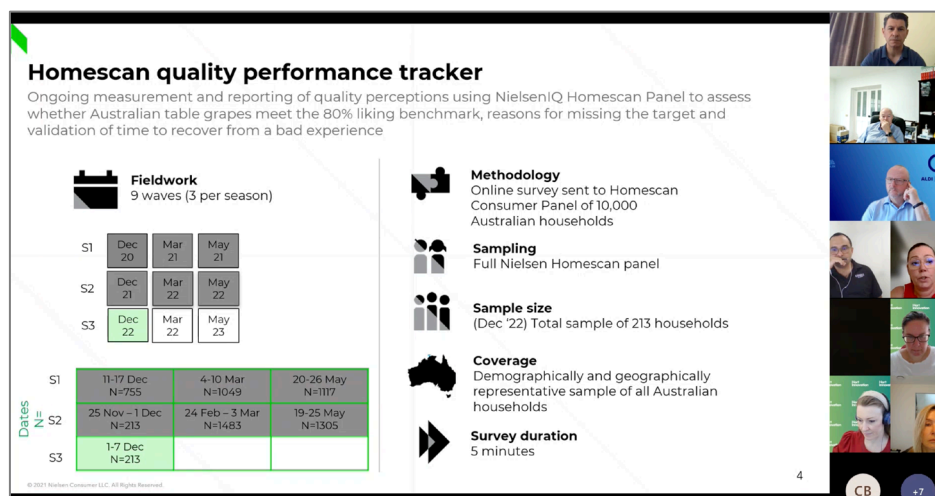
Furthermore, given the importance of imported grapes to maintaining consumer engagement with the grape category, sampling was also extended through the winter months to include imported grapes.

#### ***Monitoring Consumer Acceptability***

In conjunction with Nielsen, seasonal updates were provided to all stakeholders in the form of online presentations with recording issued for those that could not attend. This close alignment with related and complementary projects for a huge value-add for stakeholders and well supported.



Below is an example of the Nielsen seasonal updates provided to all stakeholders in the form of online presentations with recording issued for those that could not attend.



These updates were well attended by stakeholders and again encouraged a collegiate approach across the entire group to maintain adherence to the MMS. In addition, stakeholders were able to suggest questions and key information needs that were then included in the next round of consumer tracking, providing further value to stakeholders.

### Grower Roadshows

Grower Roadshows were held once a year around September to October to align with Export Registrations. In each roadshow, the results of the prior season performance was explained and then plans outlined for the upcoming season, followed by a Q&A. The aim was to aid understanding and encourage adoption and support for adhering to the maturity standards.

Retailers and producers from the stakeholder group attended the roadshows and this helped to demonstrate the aligned industry approach for supporting the adoption of the MMS, and therefore the needs for *all* growers to also work to the standards.

### Industry Communication to aid Engagement and Adoption

All communication and industry engagement, including Newsletters (The Vine magazine) and online articles (Freshplaza), were aimed at driving best-practice across the supply chain from growers through to retailers, focusing upon education and support to drive a positive culture focused on meeting MMS for Australian table grapes. This helped to drive accountability across all key stakeholders to ensure that the MMS were fully implemented and adopted and aligned all stakeholders to increase the consumption and demand of Australian Table Grapes through improving consumer acceptability.

## Outputs

The maturity monitoring data was used to help growers, retailers and the broader supply chain understand the benefits that could be provided by adopting the MMS, and aid understanding and buy-in. The key objective was to drive a sustained behaviour change across the entire industry. Key outputs are detailed below.

| Output | Description | Detail |
|--------|-------------|--------|
|--------|-------------|--------|

|  |  |   |
|--|--|---|
| Widespread adoption by the whole table grape supply chain of the MMS   | The MMS have been continually communicated to the broader supply chain, with testing and monitoring data updated weekly.   | All data was displayed on the online ClickData portal (with secure password access). See appendix for example.                |
| Adoption of MMS protocols for all key maturing monitoring activities, including pre-harvest, on-farm, in-store and in retailer                 | Meetings were held with all retailers and suppliers on the Stakeholder Working Group.  | Minutes and follow-up actions were circulated to all attendees (and a Hort Innovation representative attended some meetings). |
| Maturity results published weekly on the online portal for key grape varieties/types and individual benchmarking data provide to key retailers | This has included accessing the retailers' DC inspection data and in-store maturity monitoring.  | See appendix for example.   |
| On-Farm Testing for assessing season start   | Monitoring was conducted in Emerald, Mildura and Robinvale for a 4-week period prior to the indicative (historical) season start date and results circulated to growers, suppliers and retailers to mitigate the temptation to start the season before fruit is mature with acceptable eating quality. | See appendix for example.   |
| In-Store Monitoring  | In-store maturity monitoring was conducted weekly.   | All data was displayed on the online ClickData portal (with secure password access).  |
| Supplier Monitoring  | The supplier ID has been added to the DC inspection data (from 22 Jan 2022) to enable supplier specific data to be collated (it was not possible to arrange in-store testing due to Covid restrictions and Christmas 'lock-outs' by retailers during the busy trading period).                         | All data was displayed on the online ClickData portal (with secure password access).  |
| Industry communication   | Articles in the industry newsletter, The Vine  | See appendix.   |

## Outcomes

Below is a summary of the project's outcomes.

| Outcome   | Alignment to fund outcome, strategy and KPI                                       | Description  | Evidence   |
|---|---|--|--|
| The MMS requirements were consistently by growers and retailers, as | This outcome was closely aligned with the table grape industry development goals: | The project provided quality related data to the industry and retailers that | The adoption of the MMS was monitored through the weekly in-store monitoring |

|  |  |   |   |
|--|--|---|---|
| <p>well as the broader value chain, resulting in improved table grape quality and consistency. leading to an increase in consumer acceptability and satisfaction, and as a result, an increase in consumption and demand of Australian table grapes.</p> | <ul style="list-style-type: none"> <li>• Increased demand for Australian table grapes by strengthening and developing domestic and export market opportunities that will improve industry viability and sustainability;</li> <li>• Demand-building strategies and increased prices for Australian table grapes supported by improvements in product quality.</li> </ul>  | <p>helped ensure consistent implementation of the MMS requirement. Where individual businesses were not meeting them, this was fed back on a weekly basis. For industry-wide issues, variations were implemented that allowed availability of stock while still focussing on the consumer experience.</p>   | <p>and DC inspection data. Data gathered and presented through the data portal and weekly reports demonstrated widespread compliance with MMS requirements. Where deviations were observed, the industry and retailers adjusted their practices to be more compliant or to have industry-wide variations in place to manage seasonal issues. The Nielsen Homescan data backed this up through the consumer acceptability scores being high in the main.</p> |
| <p>An increase in:</p> <ul style="list-style-type: none"> <li>• Purchase frequency</li> <li>• Average weight of purchase (AWOP)</li> <li>• Returns/profitability</li> <li>• Stock-turn frequency (reduced waste)</li> </ul>                              | <p>This outcome was closely aligned with the table grape industry development goals:</p> <ul style="list-style-type: none"> <li>• Increased demand for Australian table grapes by strengthening and developing domestic and export market opportunities that will improve industry viability and sustainability;</li> <li>• Demand-building strategies and increased prices for Australian table grapes supported by improvements in product quality.</li> </ul> | <p>These metrics are harder to measure since there are many other variables that exert an influence, however, this project is closely aligned with Project TG19003 (Nielsen) where regular monitoring (x3/yr plus x1/yr 'deep dive') that measures these factors, as well as consumer acceptability more broadly (split by white, red and black grape types).</p>           | <p>Evidence is through the reports produced by TG19003, Seasonal Deep Dives and Homescan updates.</p>   |
| <p>Strengthened relationships and improved consultation with key stakeholders along the table grape supply chain, particularly the major retailers and key domestic producers</p>  | <p>This outcome supports the industry goals of increased consumer demand as grape quality was increasingly managed by the industry from vineyard to store.</p>   | <p>This progressed well, with regular contact with key stakeholders, leveraging the respective skillsets of the Project Team; growers/suppliers approach Jeff Scott (ATGA), retailers/suppliers approach Tristan Kitchener, and Quality Associates (Andreas Klieber) is used as a technical resource to understand anomalies and technical aspects by all stakeholders.</p> | <p>Retailers and suppliers are increasingly approaching the Project Team with questions to better understand seasonal factors, such as likely season start dates in relation to fruit maturity. In addition, stakeholders are raising other broader industry issues and seeking guidance and input, such as the change to a standard industry bag and reducing the spillage of grapes leading to people injuries in-store.</p>                              |

## Monitoring and evaluation

The Key Evaluation Questions (KEQs) are discussed below.

| Key Evaluation Question   | Project performance  | Continuous improvement opportunities   |
|---|--|--|
| Effectiveness: To what extent has the project increased the adoption of the MMS?  | The project continued the previous work of embedding the MMS requirements within the table grape industry. This was achieved through grower and retailer meetings and reporting back to the industry its ongoing performance against the MMS requirements. Of note here is growers and retailers stopped unilaterally developing variations to the MMS, but rather a whole of industry approach was adopted. | The progress to date was won through diligent communication and reinforcement of goals. It is therefore crucial to maintain momentum after the completion of this project. |
| Relevance: To what extent has the project met the needs of industry levy payers?  | The project met the need of the industry to improve consumer acceptability and quality levels.   | None identified.   |
| Appropriateness: How well have intended beneficiaries (growers and suppliers) been engaged in the project?<br><br>Have regular project updates been provided through linkage with the industry communication project?<br><br>To what extent were engagement processes appropriate to the target audience(s) of the project? | Regular road shows to meet with growers were well supported and received. In particular, participation by retailers in meetings was beneficial.<br><br>Regular updates were also provided through industry publications.<br><br>The engagement activities were specifically tailored to the growers or retailers in 1: meetings or grower roadshows to regional areas.                                       | None identified.   |
| Efficiency: What efforts did the project make to improve efficiency?  | The project was set up to efficiently distribute the relevant information and set expectations. This included a data portal and weekly emailed reports.  | None identified.   |

## Recommendations

The key recommendations and next steps resulting from the project are detailed below.

It is critical to ensure growers, suppliers and retailers maintain alignment to the MMS to prevent the progress made over the last 6 years from being undone. Since the focus of project TG19004 was upon the adoption of the MMS to increase consumer acceptability at retail, a whole-of-industry approach is critical. The has been

achieved using a push-pull strategy; this involves a grower 'push' and a retailer 'pull', thereby enabling the whole supply chain to adopt the MMS and understand the benefits of an aligned industry approach.

Growers have been encouraged ('pushed') to adopt the MMS, driven by the ATGA. The four major grocery retailers collectively account for 81% of the domestic table grape volume by sales value, and this means they are an effective and efficient means to drive behaviour change and provide the required 'pull' for the industry through the key domestic producers. The retailers are an important group of stakeholders given the influence they have over producers, so it is vital to 'help them to help us' by ensuring they are making good quality decisions based on sound facts and information. The Project Team can help facilitate and steer decision making for the benefit of industry.

During August and September 2023, individual meetings were held with all retailers and suppliers, and all stakeholders confirmed their support for the continuation of the project. It was agreed that a seamless transition from TG19004 is necessary to maintain adoption of the MMS and continue to build on the success that has been achieved to date regarding consumer acceptance.

The activities listed below are proposed across the 4 major retailers (ALDI, Coles, Costco and Woolworths) with the five main domestic suppliers (Romeos Best, Marciano, Giofrelle, Grape Exchange and Fruit Master):

1. *On-Farm Maturity Monitoring*: Monitoring of 2 farms in Emerald, Mildura and Robinvale from 4 weeks before the typical season start (weekly monitoring for the first 2 weeks and then 3 times per week) for white, red and black grapes. Data will be compiled, graphed and issued to the supply chain.
2. *Retailer DC Monitoring*: Collate QC inspection data from in-bound quality inspections from all retailers. A weekly performance summary will be provided to each retailer, detailing individual retailer performance in meeting the MMS.
3. *In-Store Sampling*: Collect and analyse retail samples against the MMS in all retailers for 52 weeks for white, red and black grapes (loose and pre-pack). Sampling frequency will increase during season changeovers and/or when quality issues are prevalent and reduce when there is consistent good quality. Sampling will also include imported fruit.
4. *Supplier Monitoring*: Testing results (retailer DC inspections and store sampling) for individual suppliers will be collated and issued to suppliers weekly.
5. *Grower Roadshows*: To aid understanding and ensure alignment to the MMS, Grower Roadshows will be held annually in Mildura, Robinvale, QLD and WA.
6. *Retailer Meetings*: A pre and post season meeting will be held each year with each retailer, including the Commercial and Technical personnel to maintain alignment and support.
7. *Specification Adjustments*: As needed, when an adjustment to the MMS is required (due to seasonal or climatic factors) the Project Team will facilitate meetings between retailers and suppliers to help balance commercial and technical considerations and ensure consumer acceptance is maintained.

NB: All data would be de-identified, with stakeholders only being informed which is their own data.

## Intellectual property

No project IP or commercialisation to report.

## Appendices

Below is a list of key tables that have been issued to industry stakeholders and will be discussed at the supplier and retailer end-of-season review meetings, as referred to in the Milestone report.

Figure 1: Year-on-Year comparison against MMS

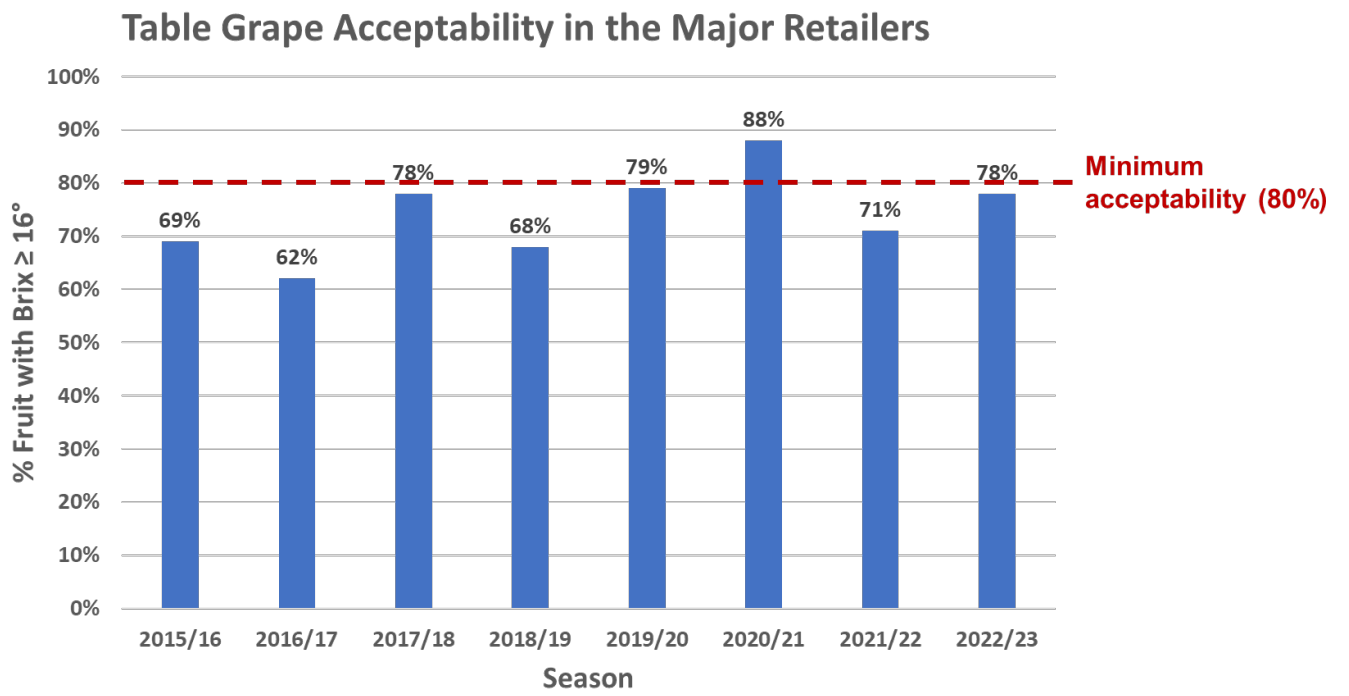


Figure 2: Weekly Grape Maturity Update for white, red and black grapes (all retailers aggregated, total 2022/23 Season)

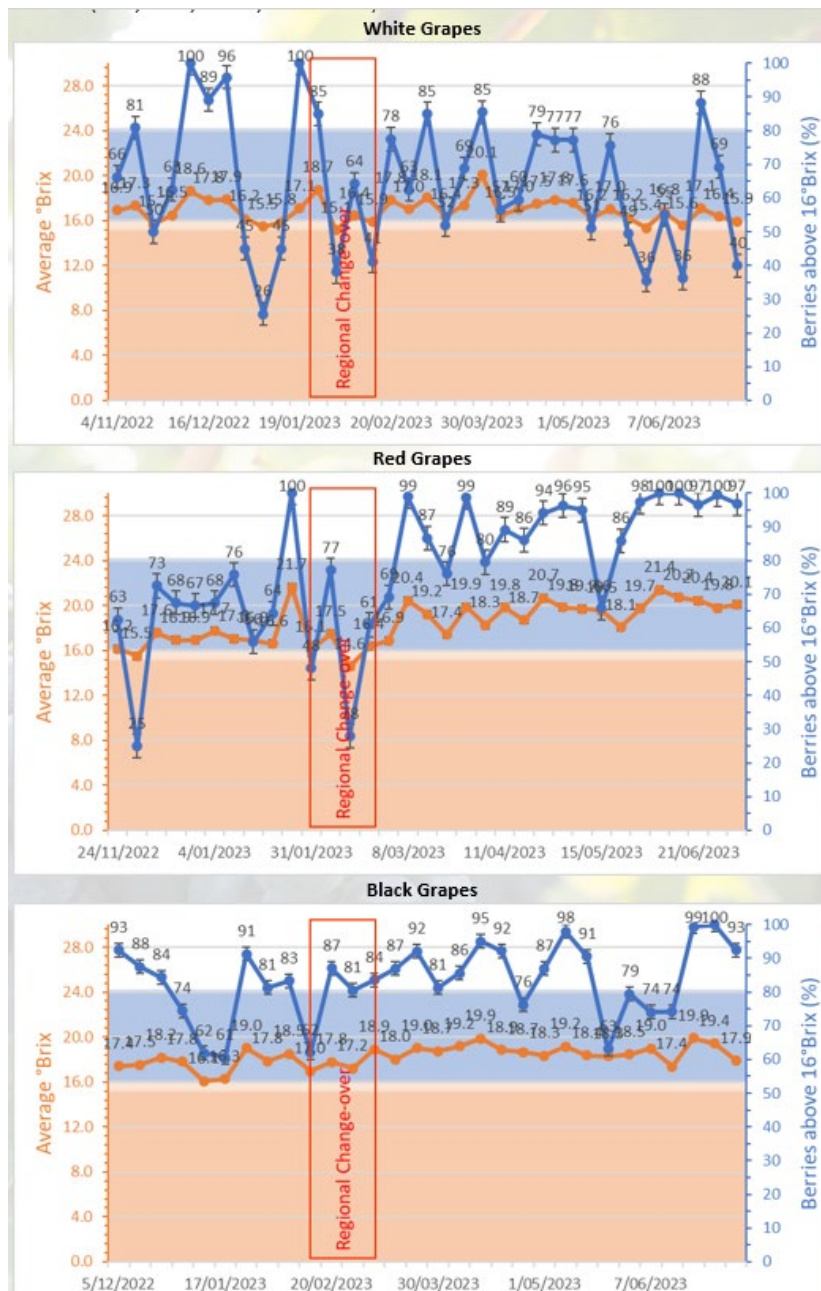


Figure 3: Weekly Grape Maturity Retailer Comparison (ALDI, Coles, Costco and Woolworths), retailer aggregated data for total 2022/23 season

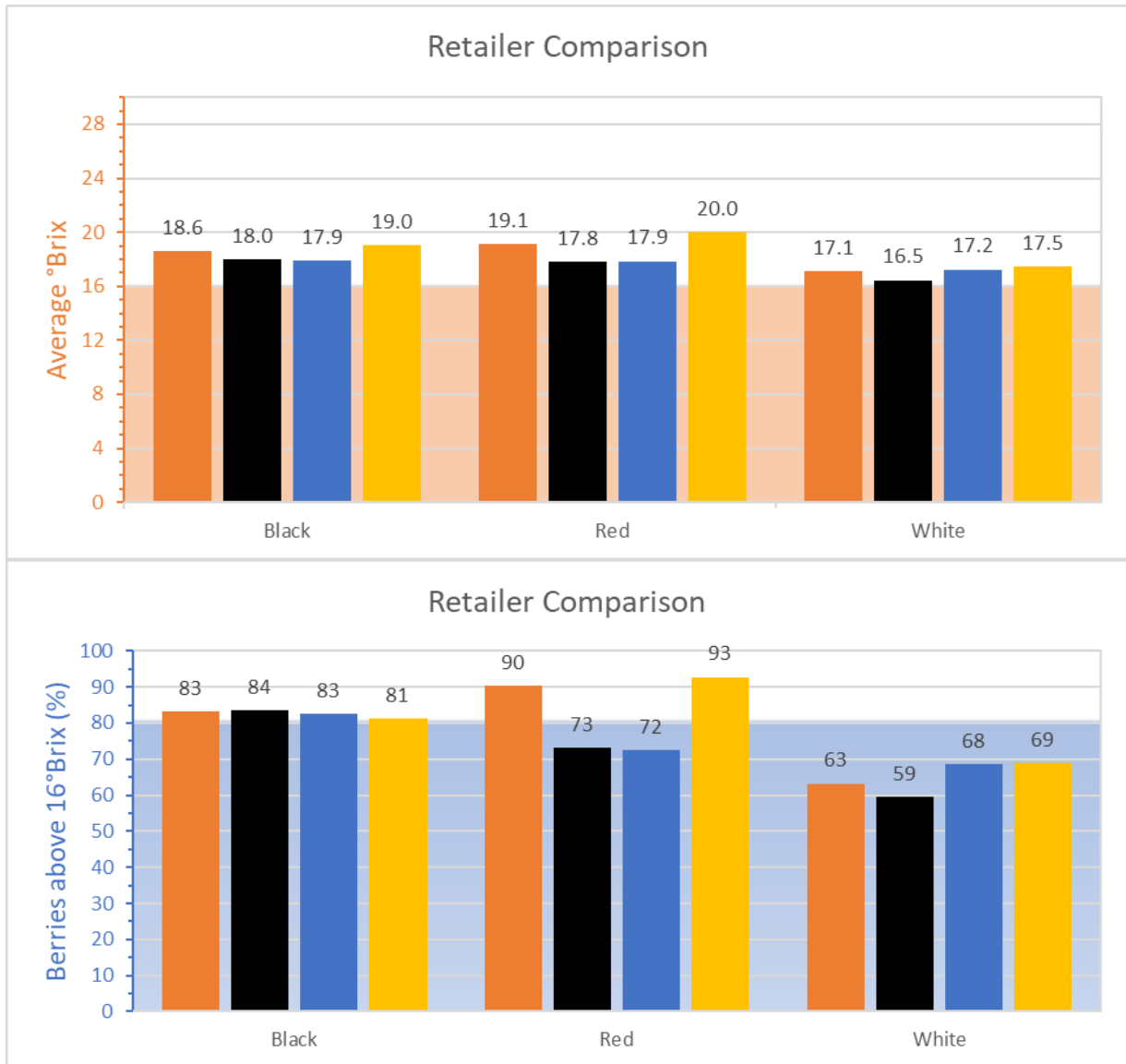




Figure 4: Weekly Grape Maturity Report for Pre-Harvest for Mildura and Robinvale (as per MS-104), Example Report

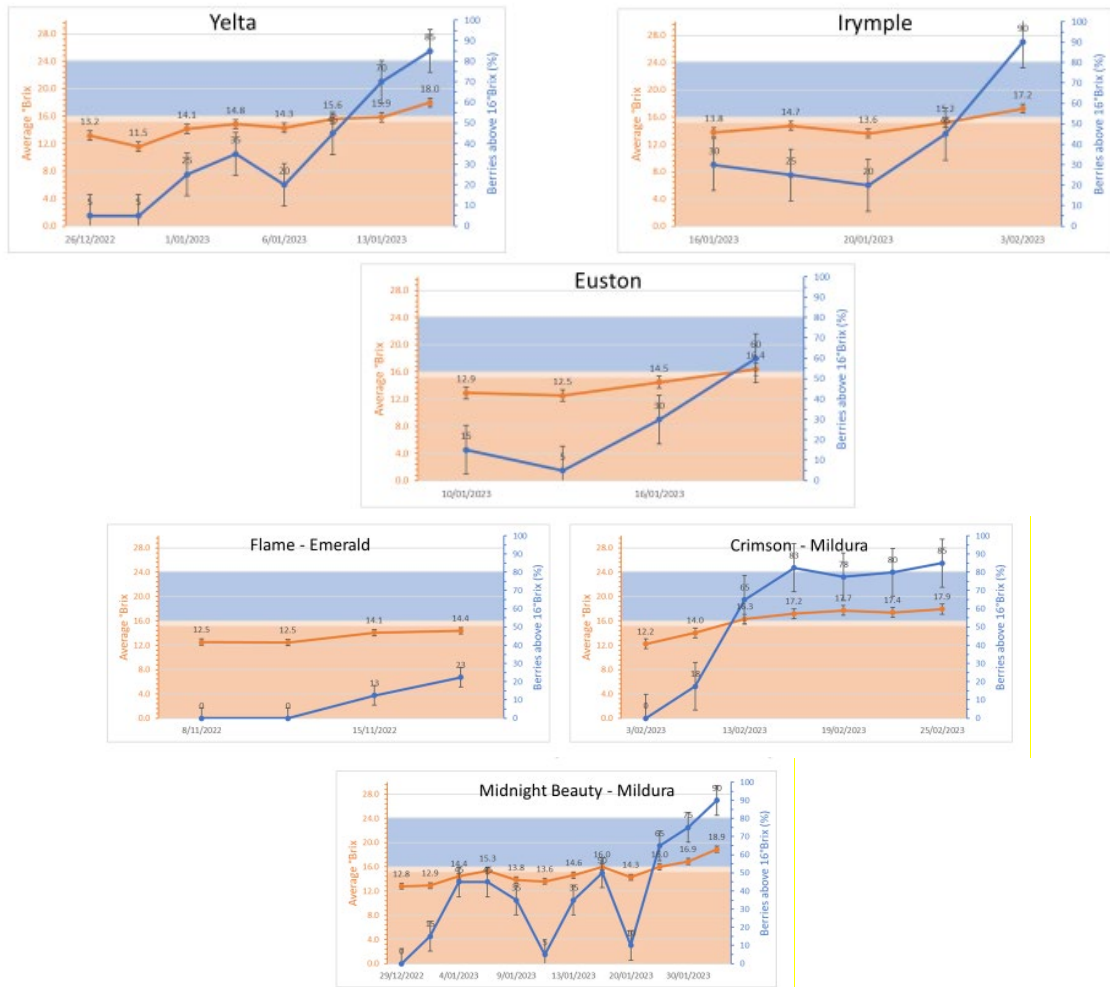


Figure 5: Seasonal Grape Maturity Supplier Comparison, aggregated data for total 2022/23 season (NB: grower details have been deidentified for confidentiality)

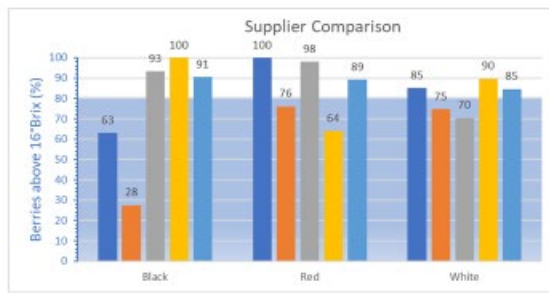
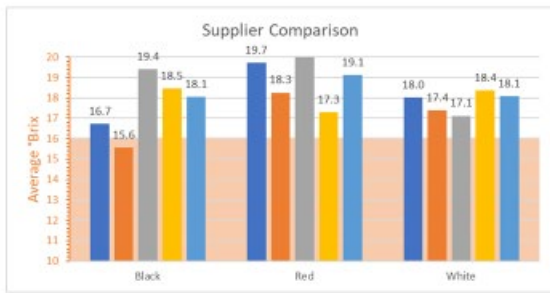
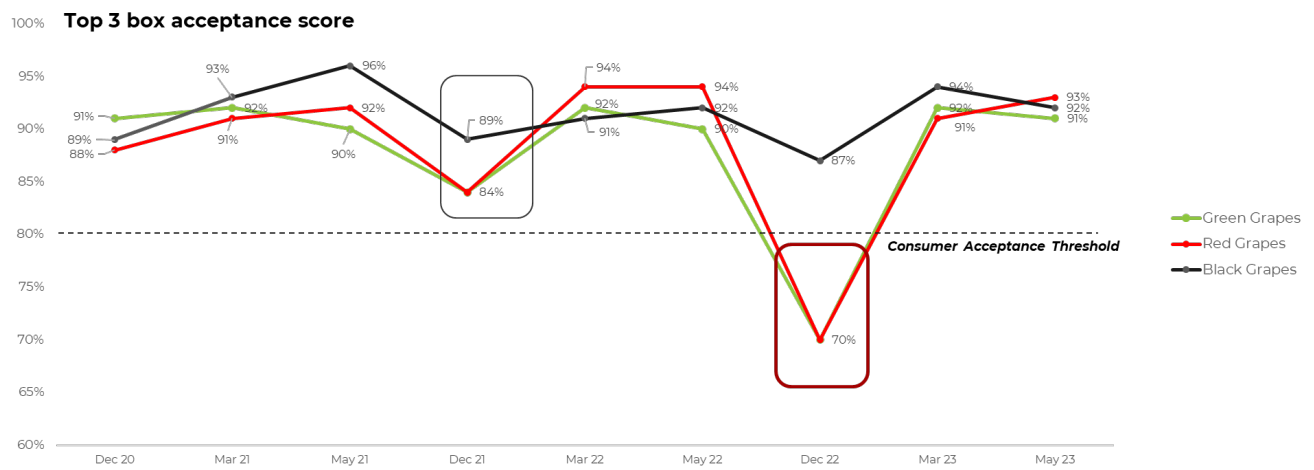


Figure 6: Nielsen Homescan Data for December 2020 to May 2023



Consumer acceptance met the 80% threshold except for white (green) and red grapes in December.