

Raspberry and blackberry

STRATEGIC INVESTMENT PLAN

2017-2021 AT A GLANCE

POTENTIAL IMPACT OF THIS PLAN



Based on an estimated investment of \$3.7 million over the next five years.

| OUTCOMES | STRATEGIES |
|--|---|
| By 2021, domestic per capita consumption of fresh Australian raspberries will increase by at least 40 per cent, supported by positive consumer perceptions of product value | Establish and monitor consumer perceptions and expectations towards fresh Australian raspberries and blackberries |
| | Promote the health benefits and value associated with eating raspberries and blackberries |
| | Provide timely information on industry production, forecasts and markets |
| By 2021, exports of Australian raspberries exceed five per cent of national production by volume, in selected markets with a capacity and willingness to pay a premium for quality fruit | Manage risks to the Australian industry's reputation as a reliable supplier of superior quality, safe products |
| | Develop a raspberry export strategy during 2017 by working with potential exporting businesses |
| | Develop and extend resource material required by businesses to enter and develop exports with existing markets |
| | Establish technical market access for new markets identified as priorities in the export strategy |

| OUTCOMES | STRATEGIES |
|---|---|
| By 2021, the industry will increase farm productivity (marketable yield per hectare) by an average 10 per cent | Facilitate availability of superior blackberry varieties that match consumer expectations |
| | Protect the high biosecurity status of the raspberry and blackberry industry |
| | Establish the main constraints and influences for increasing raspberry and blackberry industry productivity |
| By 2021, at least 90 per cent of growers and other firms involved in raspberry and blackberry value chains will be directly engaged with and value national industry services | Inform growers on the emerging options, risks and opportunities afforded by protected cropping systems |
| | Develop an informed and cohesive industry through direct two-way communications with raspberry and blackberry businesses across Australia |
| | Provide timely information on industry production, forecasts and markets |

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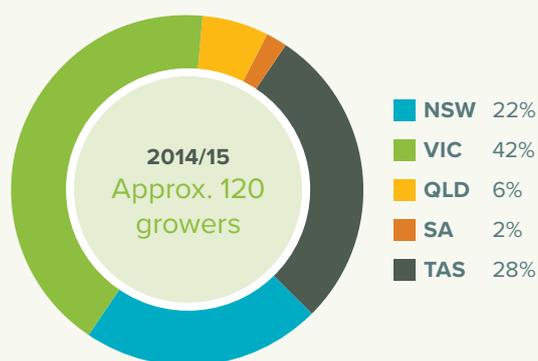
Major opportunities

- Increase in supply provides capacity to meet demand in counter seasonal export markets
- Increasing consumer demand for safe, clean food
- Increase in community association of natural foods with good health
- Major retailers seeking security of supply
- Value chain desire for strategic industry engagement to develop markets
- Consumer demand for consistent quality fruit, including look, colour and taste
- Move towards Integrated pest management and reduced inputs for production
- Availability of technology to improve productivity at all stages of value chain
- Availability of new blackberry varieties in Australia to meet consumer needs.

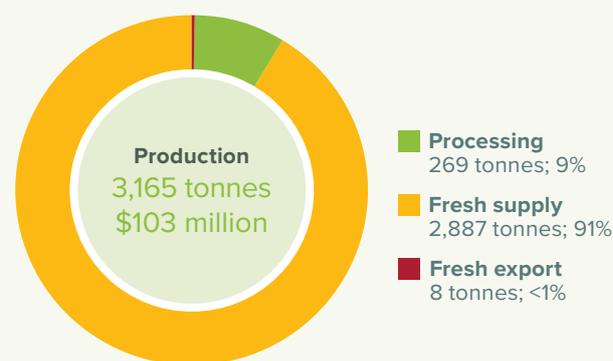
Major challenges

- Sustained rapid increase in domestic production could impact on grower prices
- Biosecurity risks to plant health status, especially spotted wing Drosophila
- Competition from other fruits and snack food products
- Reduced ease of access and higher cost for labour
- Consumer expectation for assurances with product integrity and sustainability
- Climate change and variability in growing conditions
- Domestic-focused industry with limited export experience
- High costs of production relative to overseas competitors, especially for labour
- Variable productivity across Australian growers and relative to overseas growers
- Lack of reliable, current time series data and information on raspberry and blackberry production and market trends
- Declining access to chemicals needed for optimal production
- Dependence on importation of new and proven raspberry and blackberry plant genetics.

Industry size and production distribution



Raspberry and blackberry supply chain and value 2014/15



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