

Apple and pear

Strategic Investment Plan

2022-2026



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EXECUTIVE SUMMARY

The overarching strategic intent of this Strategic Investment Plan (SIP) is to improve international competitiveness, profitability and sustainability of the Australian apple and pear industry through export market access, consistent high-quality products, advancements in orchard systems and effective biosecurity systems.

The apple and pear SIP 2022-2026 provides a roadmap to guide Hort Innovation's investment of apple and pear industry levies and Australian Government contributions, ensuring investment decisions are aligned with industry priorities.

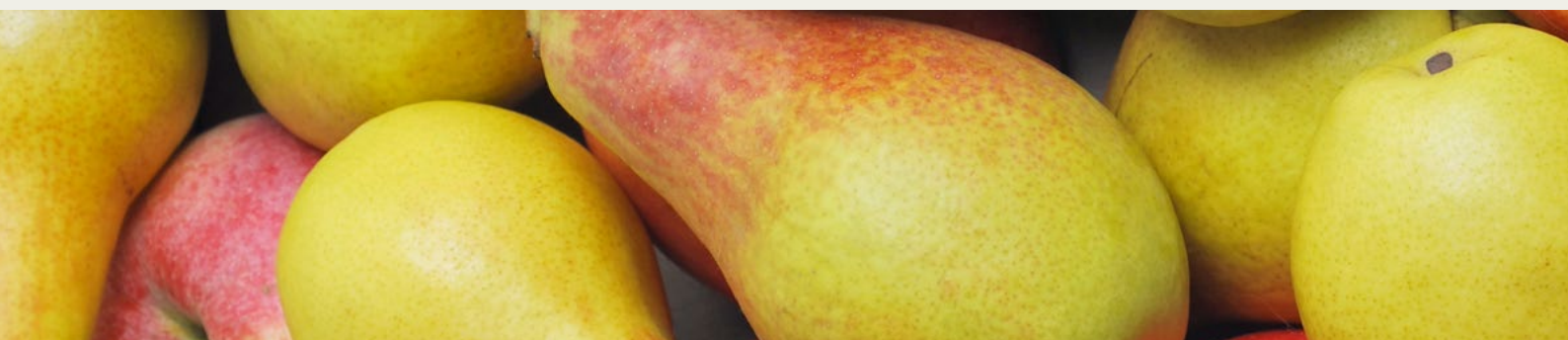
The Australian apple and pear industry situation in 2019/20 is described on **page 4** with further information provided in **Appendix 1**. Apples are grown across all states and territories except for the Northern Territory. Victoria produces the most apples at 46% of production volume. Apple production volume has declined over the past three years from a peak of 319,686 tonnes in 2016/17 to 301,792 tonnes in 2019/20, largely due to drought conditions across eastern Australia. Pear production has declined significantly since the mid-2000s reflecting the shift away from lower value, large processing volumes to higher value fresh varieties and rising exports. The pear industry is now mature and characterised by consistent production volumes and gradually increasing production value.

The strategic intent of the apple and pear SIP provides a summary of how the apple and pear industry will drive change over the life of the SIP. This will ultimately come about by improving the industry's advancements in orchard and biosecurity systems, and achieving consistent product quality, profitability and sustainability through market development initiatives.

The financial estimates give an indicative overview of the funding availability for the period of FY2022-FY2026. Currently the apple and pear research and development (R&D) fund is invested until FY2022 with funds becoming available in FY2023 for further R&D investments. Careful prioritisation of future investments will be required to meet the needs of the industry.

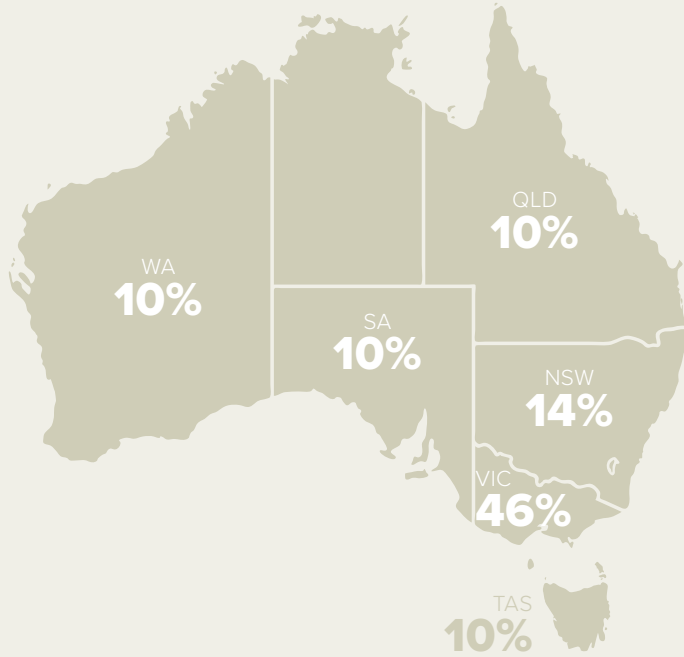
The four outcome areas of this SIP cover significant themes under which programs and investments will be focused. These are listed in priority order for the apple and pear industry. Demand is the focus because of the need to maintain access to domestic and international markets. This includes technical market access, market retention and diversification with a focus on high-quality product. The next focus is productivity and supply, with priorities being orchard system optimisation for automation, mechanisation and labour efficiencies.

The key performance indicators (KPIs) detail how the impact of each strategy will be measured, for example, enhanced sustainable orchard system design and management to increase orchard profitability through efficiency and quality by identifying orchard systems that will be compatible with automation and technology solutions.

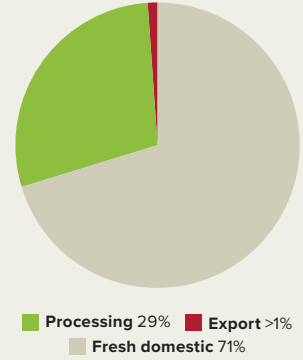


APPLE

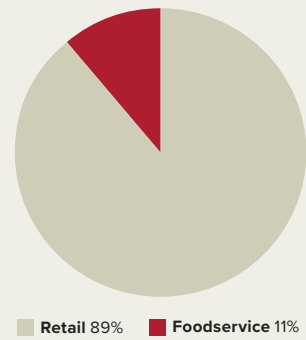
APPLE PRODUCTION REGIONS:



EXPORT/FRESH DOMESTIC/PROCESSING:



RETAIL VS FOODSERVICE:



PRODUCTION WINDOW:



Feb-May

NUMBER OF GROWERS:



Over **500** growers

FARMGATE VALUE OF PRODUCT:



\$652 million

in 2019/20

PRODUCTION VOLUMES:



301,792 tonnes

in 2019/20

PRODUCTION AREA:



10,000 hectares

PER CAPITA CONSUMPTION:

8.3 kg

in 2019/20



VARIETIES:



Pink lady

41%

Gala

23%

Granny Smith

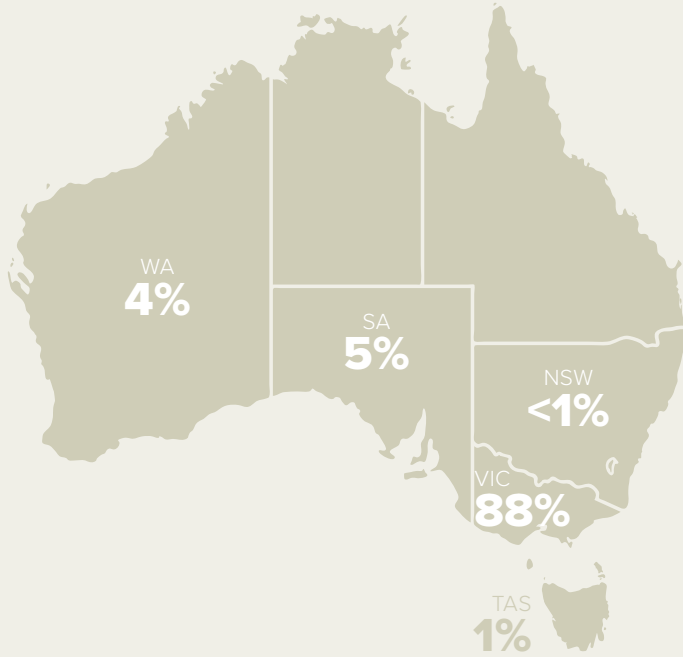
18%

Red delicious, Fuji and others

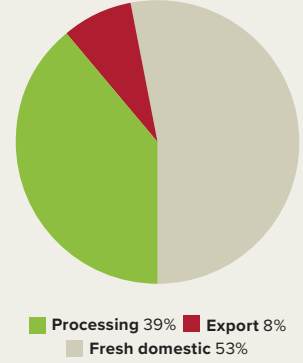
18%

PEAR

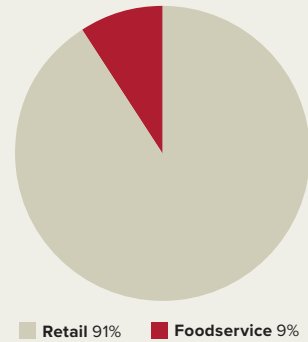
PEAR PRODUCTION REGIONS:



EXPORT/FRESH DOMESTIC/PROCESSING:



RETAIL VS FOODSERVICE:



PRODUCTION WINDOW:



Jan-Mar

NUMBER OF GROWERS:



255

PER CAPITA CONSUMPTION:

2.4 kg

in 2019/20



PRODUCTION VOLUMES:



118,545 tonnes

in 2019/20

FARMGATE VALUE OF PRODUCT:



\$128 million

in 2019/20

VARIETIES:



Packham

63%

Williams

20%

Buerre Bosc

10%

Other
7%

THE APPLE AND PEAR STRATEGIC INVESTMENT PLAN

The apple and pear SIP is the roadmap that will guide Hort Innovation's oversight and management of the apple and pear industry's investment programs. It lays the foundation for decision-making in investments and represents the balanced interest of the whole industry. The important function of the SIP is to ensure that the investment decisions align with apple and pear industry priorities.

Hort Innovation has led the process for preparing the refresh of the apple and pear SIP, listening and engaging with levy payers and key stakeholders including Industry Representative Bodies (IRBs) and expertise available through advisory mechanisms and delivery partners. The refresh process involved consultation with and input from a wide range of levy payers, objective analysis of performance and learning from the previous SIP, and environmental scanning to identify emergent trends and issues that could impact on industry profitability and sustainability.

The whole-of-company approach taken by Hort Innovation to produce this SIP has harnessed existing external and internal knowledge, learning, partnerships and relationships. The output is a tailored plan with which the apple and pear industry can be confident of its strategic intent, including visibility on how investment impacts will be identified. Specific investments to address the SIP strategies and align with industry strategic priorities will be outlined in detail via the apple and pear Annual Investment Plan (AIP). The AIP will be published each year over the lifespan of the SIP and detail the investments that will be prioritised based on potential industry impact, as well as the availability of levy funds. Hort Innovation will advise industry stakeholders when the AIP has been published via established communication channels each year. The AIP will be developed with input from the apple and pear Strategic Investment Panel (SIAP), the apple and pear Strategic Marketing Panel (SMP), IRBs and other key stakeholders.

Hort Innovation has valued the support, advice, time, and commitment of all stakeholders that contributed to producing this SIP, especially apple and pear growers.

Producers in the apple and pear industry pay levies to the Department of Agriculture, Water and the Environment, which is responsible for the collection, administration and disbursement of levies and charges on behalf of Australian agricultural industries.

Agricultural levies and charges are imposed on primary producers by government at the request of industry to collectively fund R&D, marketing, biosecurity and residue testing programs.

Levy is payable on apples and pears that are produced in Australia and either sold by the producer or used by the producer in the production of other goods.

The R&D levy rate on apples and pears is set at the below rates:

- 0.72 cents per kilogram for domestic and export apples
- 65 cents per tonne for juicing apples
- \$1.30 per tonne for processing apples
- 0.775 cents per kilogram for domestic and export pears
- 60 cents per tonne for juicing pears
- \$1.20 per tonne for processing pears.



The apple and pear SMP was established to drive demand for Australian apples and pears, in both domestic and international markets, through effective and efficient marketing. The role of the SMP is to guide the development and implementation of a mid to long-term marketing strategy and annual plan that delivers growth in domestic apple and pear consumption, and growth in fresh apple and pear exports.

The marketing levy for apples and pears is set at the below rates:

- 1.03 cents per kilogram for domestic and export apples
- \$2.00 per tonne for juicing apples
- \$4.00 per tonne for processing apples
- 1.249 cents per kilogram for domestic and export pears
- \$2.25 per tonne for juicing pears
- \$4.50 per tonne for processing pears.

Separately, Plant Health Australia (PHA) manages a levy set at (0.02c per kilogram).

The apple and pear industry levy and charge rate also comprises an Emergency Plant Pest Response (EPPR) set at 0.05 cents per kilogram for apples (domestic and export).

Hort Innovation has developed this SIP for the apple and pear industry to strategically invest the collected apple and pear levy funds into the priority areas identified and agreed by the apple and pear industry.

This plan represents the Australian apple and pear industry's collective view of its R&D and marketing needs over the next five years (2022-2026). The plan has leveraged the learning and achievements from the past plan and been developed in consultation with Australian apple and pear levy payers, combined with analysis of the previous SIP and synthesis of various strategic documents. **Appendix 3** acknowledges the people who were consulted in the preparation and validation of this SIP. Statistics and data within this publication are sourced from the Australian Horticulture Statistic Handbook 2019/20 and other documents unless stated otherwise and are listed in **Appendix 4**. A list of acronyms used within the document is available in **Appendix 5**.

“The important function of the SIP is to ensure that the investment decisions align with apple and pear industry priorities.”



Financial estimates

The annual revenue from levy income and Australian Government contributions for eligible R&D set the overall budget parameters for the apple and pear SIP. Importantly, a portion of these funds is already committed, as the industry has current multi-year projects for R&D and marketing activities. In addition, the levy income from year to year will vary due to changes in seasonal and market conditions.

The indicative financial estimates used for the purposes of developing this SIP are presented in **Table 1** below. These figures are regularly reviewed to reflect the latest information and statistics for the industry and any changes in investment priority. Further details will be available in the AIP each year.

TABLE 1. Indicative financial estimates for the apple and pear SIP over the life of the SIP

	2022 \$	2023 \$	2024 \$	2025 \$	2026 \$
APPLE AND PEAR R&D					
Balance end FY2021	339,643				
Estimated levy funds (growers)	2,055,000	2,055,000	2,055,000	2,055,000	2,055,000
Australian Government contribution	2,100,929	1,810,569	2,167,712	1,872,242	2,032,520
Current investments	3,017,800	1,917,800	1,632,800	724,000	500,000
New investments	600,000	1,200,000	2,100,000	2,500,000	3,000,000
Total project investments	3,617,800	3,117,800	3,732,800	3,224,000	3,500,000
CCR	584,058	503,338	602,624	520,483	565,041
Projected end balance	244,000	436,000	276,000	407,000	382,000
APPLE MARKETING					
Balance end FY2021	1,397,283				
Estimated levy funds (growers)	2,250,000	2,250,000	2,250,000	2,250,000	2,250,000
Current investments	2,100,000	–	–	–	–
New investments	–	1,500,000	1,400,000	1,400,000	1,400,000
Total project investments	2,100,000	1,500,000	1,400,000	1,400,000	1,400,000
CCR	391,103	279,359	260,735	260,735	260,735
Projected end balance	430,800	354,000	372,000	384,000	389,500



	2022 \$	2023 \$	2024 \$	2025 \$	2026 \$
PEAR MARKETING					
Balance end FY2021	1,264,123				
Estimated levy funds (growers)	720,000	805,000	805,000	805,000	805,000
Current investments	1,300,000	–	–	–	–
New investments	–	450,000	400,000	400,000	400,000
Total project investments	1,300,000	450,000	400,000	400,000	400,000
CCR	236,501	81,866	72,769	72,769	72,769
Projected end balance	72,800	20,000	23,000	27,000	32,000

Disclaimer: All figures are indicative only and may change depending on actual income and expenditure.

Balance end FY2021 – The closing balance of the fund as at 30 June 2021

Estimated levy funds – Net levy income/revenue that is generated and collected by levy revenue services (LRS)

Australian Government contribution – Amount of contribution from the Australian Government on R&D levy-funded expenditure

Current investments – Current estimated value of contracted projects

New investments – The estimated dollar value that is available for potential new investments for industry subject to industry advice

CCR – Corporate cost recovery: the cost to implement and manage R&D and marketing investment programs for each industry

Projected end balance – Forecast of the anticipated final position of the fund





APPLE AND PEAR INDUSTRY OUTCOMES

The overarching strategic intent of this SIP is to improve international competitiveness, profitability and sustainability of the Australian apple and pear industry through export market access, consistent high-quality products, advancements in orchard systems and effective biosecurity systems.

Industry outcomes

Outcome statements as identified and prioritised by the apple and pear industry have been prepared under four key outcome areas: demand creation; industry supply, productivity and sustainability; extension and capability; and business insights.

OUTCOME 1: Demand creation

Contribute to demand generation to drive growth across domestic and international markets.

Demand creation will support industry to expand into existing and future domestic and international markets and is supported by increased consumer knowledge, attitudes and purchase intent to drive growth.

The strategic intent of this outcome is to maintain and strengthen consumer demand, as the foundation for sustainable expansion of production and consumption in both domestic and international markets. It means the industry is investing to:

- Broaden consumer awareness so that apple and pear products are more top of mind and purchased more frequently
- Build strong brands in 'Aussie Apples' and 'Australian Pears' by improving awareness, consideration, attitudes and knowledge
- Maintain access to international markets, including technical market access, market retention and diversification
- Identify and prioritise export and domestic market niches where there is demand and growth potential for competitive supply of quality Australian apples and pears
- Develop strong relationships across the supply chain with a shared goal to grow the category
- Support product positioning with consistent quality, evidence of beneficial product health attributes and responsible industry production practices.

In addition to the above, there is an opportunity for the apple and pear industry to examine the main drivers of community trust in and acceptance of Australian rural industries, as well as the evolving carbon market, including carbon farming, sequestration and related opportunities. The approach to such programs can be the catalyst for product and industry differentiation, drive investment, create industry growth and generate value to consumers. This would align to the Australian-grown Horticulture Sustainability Framework (see **page 22** of this SIP), which aims to strengthen the horticulture industry's sustainability practices to meet the changing expectations and needs of growers, consumers, community, investors and governments.

OUTCOME 2: Industry supply, productivity and sustainability

Improve industry productivity (inputs/outputs) to maintain local and international competitiveness and viability of supply.

Supply and productivity will be supported through improvements to production efficiencies, which will drive profitability outcomes while ensuring long-term sustainability outcomes.

The strategic intent of this outcome is to accelerate the application of production practices that optimise returns and reduce risk to growers. Achieving the outcome will involve:

- Developing sustainable growing systems that optimise water and labour-use efficiency
- Protecting the production base through robust biosecurity systems, that will include surveillance, preparedness, diagnostic capability and capacity, robust traceability systems, and nursery accreditation
- Maintaining international competitiveness through quality and postharvest management
- Enhancing crop pollination and resilience through improved pollination security
- Proactively monitoring potential crop protection regulatory threats and having access to a broader suite of effective, socially acceptable, and environmentally sound crop protection solutions.

OUTCOME 3: Extension and capability

Building capability and innovative culture.

Building capability and an innovative culture will support industry cohesion and increase the use of relevant investment outputs across supply, demand, and insight initiatives to drive impacts.

The strategic intent of the outcome is to manage knowledge, relationships, systems, and processes required to communicate effectively with internal and external stakeholders. Achieving the outcome will involve:

- Proactive strategic and evidence-based decision-making in businesses and for industry on investment, priorities, and risk management
- A change in knowledge, attitude, skills, aspiration (KASA) and practice for grower/industry profitability and sustainability through the use of best practice and innovating
- Partnering with industry stakeholders to leverage existing extension and knowledge-sharing programs and delivery channels (FO) – minimising duplication and maximising return on levy funding
- Growers, supply chain stakeholders, media and governments being well informed on R&D investments, outcomes, and achievements as a vital part of regional communities and networks
- Improving networks and cross-industry collaboration to increase the use of R&D outputs to build a stronger, more resilient industry.

OUTCOME 4: Business insights

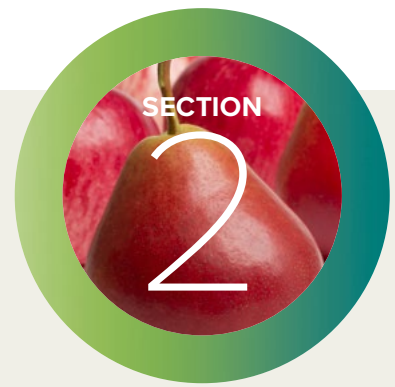
Measure industry supply (production) and demand (consumer behaviour) data and insights to inform decision-making.

Business insights will support the industry to remain aware of market and industry trends to drive informed decision-making.

The strategic intent of this outcome is to deliver data and insights, which is foundational to achieving success in the other three outcome areas of: demand creation; industry supply, productivity and sustainability; and extension and capability.

Achieving the outcome will involve reliable baseline data and analysis to provide insights and understand current and emerging trends. Key investments will support the provision of consumer knowledge and tracking, trade data, independent reviews, production statistics and forecasting to enable better decision-making process at industry level and individual businesses.

These investments underpin and are complementary to delivery of the other outcome areas.



APPLE AND PEAR INDUSTRY STRATEGIES

Strategies to address industry investment priorities

The tables below describe the strategies and identified impacts for each of the key outcome areas. The highest priority investments lay the foundation for the SIP and its implementation will require a balanced approach to ensure the industry has a high likelihood of success over the short (0-3 years), medium (3-5 years) and long term (5-10 years).

The ability to deliver on these strategies (and subsequent investments) will be determined by the ability of the statutory levy to provide the resources to do so. Further resources and efficiencies may potentially become available through alternative funding sources by way of Hort Frontiers strategic partnership initiative, external grants and/or cross-industry initiatives.

OUTCOME 1: Demand creation

Demand creation supports the Australian apple and pear industry to develop existing and future domestic and international markets.

STRATEGIES	POTENTIAL BENEFIT OR IMPACT
1. Build domestic consumer demand for fresh, quality Australian apples and pears through knowledge, attitudes and purchase intent	<ul style="list-style-type: none"> Increased consumer demand for Australian apples and pears
2. Drive quality and customer experience from farm to home (including in-store strategy)	<ul style="list-style-type: none"> Increased consumer demand for Australian apples and pears
3. Build international consumer awareness and preference of fresh, quality Australian apples and pears through improving knowledge, attitudes and purchase intent	<ul style="list-style-type: none"> Increased consumer preference for Australian apples and pears Growth in existing priority markets
4. Develop a targeted export market development plan to strengthen trade relationships in key export markets	<ul style="list-style-type: none"> Increased exports into priority markets
5. Monitor and record an apple and pear pests and diseases profile for the purpose of supporting market access and to continue to seek new market access and improvements to existing markets as outlined in the export strategy	<ul style="list-style-type: none"> Increased exports into priority markets



OUTCOME 2: Industry supply, productivity and sustainability

The Australian apple and pear industry has increased profitability, efficiency and sustainability through innovative R&D and sustainable best management practices (BMPs).

STRATEGIES	POTENTIAL BENEFIT OR IMPACT
1. Develop management strategies to optimise productivity and profitability in apple and pear orchards, including soil and plant health, inputs such as water and labour, and crop protection and environmental factors	<ul style="list-style-type: none"> Resilient orchard production ecosystems (e.g., fruit, plant, soil, pest and disease, climate, environment) Sustainable crop protection
2. Enhance industry biosecurity preparedness and resilience to ensure business continuity, and market access and trade, both domestically and internationally	<ul style="list-style-type: none"> Improved preparedness for and recovery from biosecurity threats to ensure business continuity and market access Enhanced fruit fly management leading to better productivity and market access outcomes
3. Enhance sustainable orchard system design and management to optimise orchard profitability through improvements in input efficiencies and quality improvements	<ul style="list-style-type: none"> Internationally competitive and profitable orchards through efficient resource use (e.g., labour and water), crop protection, nutrition, yield and quality, and adaptation to climatic and environmental changes Optimisation of orchard systems for automation, mechanisation and efficiencies of orchard inputs
4. Support pollination security through robust honey bee health, and pest and disease mitigation	<ul style="list-style-type: none"> Maintained access to honey bees for pollination
5. Prioritise the major crop protection gaps through a Strategic Agrichemical Review Process (SARP)*	<ul style="list-style-type: none"> Available registered or permitted pesticides are evaluated for overall suitability against major disease, insect pests and weed threats. The SARP aims to identify potential future solutions where tools are unavailable or unsuitable
6. Provide regulatory support and co-ordination for crop protection regulatory activities with the potential to impact plant protection product access, both in Australia and internationally*	<ul style="list-style-type: none"> Regulatory Risk Assessments have informed proactive strategic priority setting to avoid pest management gaps in the event that access or use is negatively impacted
7. Generate residue, efficacy and crop safety data to support applications to the Australian Pesticides and Veterinary Medicines Authority (APVMA) to gain, maintain or broaden access to priority uses for label registrations and/or minor use permits for crop protection needs*	<ul style="list-style-type: none"> Crop protection solutions meet industry priority needs as identified in the industry SARP or biosecurity plan
8. Support access to and understanding of international Maximum Residue Limits (MRLs) for export compliance	<ul style="list-style-type: none"> Reduced risk of noncompliance leading to market closure



OUTCOME 3: Extension and capability

Improved capability and an innovative culture in the apple and pear industry maximises investments in productivity and demand.

STRATEGIES	POTENTIAL BENEFIT OR IMPACT
1. Deliver industry-specific communication, capacity, and capability to create positive changes in the areas of sustainable production, value-adding opportunities along the supply chain, labour efficiency, crop protection, biosecurity, soil, plant health and export capability	<ul style="list-style-type: none"> Increased awareness, knowledge, skills and practice of grower/industry profitability and sustainability which supports best practice and innovations (e.g., sustainable production, labour efficiency, pest and disease management, biosecurity, soil health, supply chain function, processing, contemporary value chains and export capability) Growers, supply chain, media and governments well informed on industry initiatives and achievements as a vital part of communities and networks
2. Provide opportunity for engagement within industry, across industry members and with relevant stakeholders throughout the supply chain to innovate by utilising trusted relationships	<ul style="list-style-type: none"> Improved networks and cross-industry collaboration that increases efficiencies and the use of R&D outputs to build a stronger more resilient and profitable industry
3. Strengthen industry leadership through initiatives and training	<ul style="list-style-type: none"> Proactive strategic and evidence-based decision-making for industry on investment, priorities and risk management

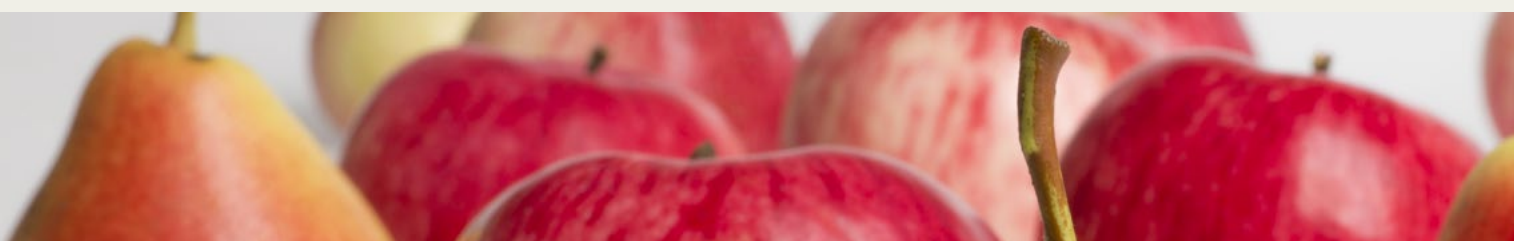
OUTCOME 4: Business insights

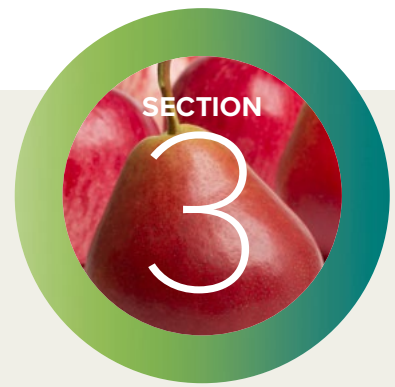
The Australian apple and pear industry is more profitable through informed decision-making using consumer knowledge and tracking, trade data, production statistics and independent reviews.

STRATEGIES	POTENTIAL BENEFIT OR IMPACT
1. Use trade data to guide ongoing export development opportunities*	<ul style="list-style-type: none"> Increased knowledge and scientific/research capacity
2. Use Industry production benchmarking activity to measure and track industry productivity and profitability	<ul style="list-style-type: none"> Increased industry and grower capacity to make informed business decisions Opportunities for costs reduction
3. Increase industry alignment with quality and brand-positioning opportunities driven by consumer insights*	<ul style="list-style-type: none"> Provision of business insights to deliver against demand, trade, supply and extension outcomes

* Foundational investments provide data and information that underpin the delivery of other SIP outcome areas and will be aligned to this strategy. Foundational investment areas include:

- Consumer behavioural data
- Consumer usage and attitudes, and brand health tracking data
- Impact assessments
- Trade data
- Crop protectant data.





APPLE AND PEAR SIP MONITORING AND EVALUATION

The apple and pear SIP Monitoring and Evaluation (M&E) Framework development has been informed by Hort Innovation’s Organisational Evaluation Framework.

Progress against the SIP will be reported in Hort Innovation publications and through industry communication channels. The SIP outcomes and strategies are used to inform KPIs that in turn drive the investments and individual projects to deliver on the SIP. Projects responsible for delivering the strategy aligned with each KPI will collect the data.

An M&E and reporting framework is shown below. The framework shows what will be measured to demonstrate progress against the SIP and how metrics will be tracked. Reporting on KPIs will be processed through various formal channels to inform industry and government investors of progress, performance, and impact. Data sources to support M&E will be identified and collected as part of the requirements for each levy investment.

Hort Innovation will facilitate the regular review of the SIP to ensure it remains relevant to industry.

Apple and pear SIP Monitoring and Evaluation Framework

The apple and pear SIP M&E Framework is shown below. It includes key performance KPIs and data collection methods both at a macro/industry (trend) level and at more specific SIP strategic level/s.

OUTCOME	STRATEGIES	KPIs
Demand creation		
Outcome 1: Demand creation supports the Australian apple and pear industry to develop existing and future domestic and international markets.	1. Build domestic consumer demand for fresh, quality Australian apples and pears through knowledge, attitudes and purchase intent	<ul style="list-style-type: none"> Positive influence on consumer preference Use of nutritional information to support consumer demand
	2. Drive quality and customer experience from farm to home (including in-store strategy)	<ul style="list-style-type: none"> Increased customer experience Increase in demand
	3. Build international consumer awareness and preference of fresh, quality Australian apples and pears through improving knowledge, attitudes and purchase intent	<ul style="list-style-type: none"> Increasing awareness of Australian apples and pears Positive influence on consumer preference
	4. Develop a targeted export market development plan to strengthen trade relationships in key export markets	<ul style="list-style-type: none"> Delivery of an export strategy in collaboration with industry Support for development of networks online and/or in market Increased awareness and understanding of trade in priority markets
	5. Monitor and record an apple and pear pests and diseases profile for the purpose of supporting market access and to continue to seek new market access and improvements to existing markets as outlined in the export strategy	<ul style="list-style-type: none"> Access to international markets

OUTCOME	STRATEGIES	KPIs
Industry supply, productivity and sustainability		
<p>Outcome 2: The Australian apple and pear industry has increased profitability, efficiency and sustainability through innovative R&D and sustainable BMPs.</p>	<p>1. Develop management strategies to optimise productivity and profitability in apple and pear orchards, including soil and plant health, inputs such as water and labour, and crop protection and environmental factors</p>	<ul style="list-style-type: none"> • Growers satisfied with the available resources
	<p>2. Enhance industry biosecurity preparedness and resilience to ensure business continuity, and market access and trade, both domestically and internationally</p>	<ul style="list-style-type: none"> • Maintenance/tracking of the implementation of an industry biosecurity plan • Improved monitoring, surveillance, on-farm biosecurity measures and control of exotic and endemic fruit flies (e.g., case studies)
	<p>3. Enhance sustainable orchard system design and management to optimise orchard profitability through improvements in input efficiencies and quality improvements</p>	<ul style="list-style-type: none"> • Sustainable orchard system design is compatible with automation and technology solutions • Development of sustainable orchard system design and management to improve efficiency and quality
	<p>4. Support pollination security through robust honey bee health, and pest and disease mitigation</p>	<ul style="list-style-type: none"> • Evidence of sustainable honey bee health through surveillance data
	<p>5. Prioritise the major crop protection gaps through a Strategic Agrichemical Review Process (SARP)*</p>	<ul style="list-style-type: none"> • Co-ordinated industry priority setting with a clear outlook of gaps and risks in existing pest control options • Industry priority needs published and shared with stakeholders, including registrants
	<p>6. Provide regulatory support and co-ordination for crop protection regulatory activities with the potential to impact plant protection product access, both in Australia and internationally*</p>	<ul style="list-style-type: none"> • Regulatory Risk Assessments maintained
	<p>7. Generate residue, efficacy and crop safety data to support applications to the Australian Pesticides and Veterinary Medicines Authority (APVMA) to gain, maintain or broaden access to priority uses for label registrations and/or minor use permits for crop protection needs*</p>	<ul style="list-style-type: none"> • Data to support applications to the APVMA and the establishment of MRLs • Exporters have the necessary information to comply with international MRLs
	<p>8. Support access to and understanding of international MRLs for export compliance</p>	<ul style="list-style-type: none"> • Improved grower access to export market MRLs



OUTCOME	STRATEGIES	KPIs
Extension and capability		
<p>Outcome 3: Improved capability and an innovative culture in the apple and pear industry maximises investments in productivity and demand.</p>	<p>1. Deliver industry-specific communication, capacity, and capability to create positive changes in the areas of sustainable production, value-adding opportunities along the supply chain, labour efficiency, crop protection, biosecurity, soil, plant health and export capability</p>	<ul style="list-style-type: none"> Establishment of a baseline and then increased share of industry (ha) with positive change in KASA concerning targeted high priority areas (e.g., crop protection) Establishment of a baseline and then increased share of industry (ha) that are implementing targeted high priority areas (e.g., export capability)
	<p>2. Provide opportunity for engagement within industry, across industry members and with relevant stakeholders throughout the supply chain to innovate by utilising trusted relationships</p>	<ul style="list-style-type: none"> Improved networks and cross-industry collaboration that increases efficiencies and the use of R&D outputs to build business and industry innovation
	<p>3. Strengthen industry leadership through initiatives and training</p>	<ul style="list-style-type: none"> Increased participation in industry leadership initiatives
Business insights		
<p>Outcome 4: The Australian apple and pear industry is more profitable through informed decision-making using consumer knowledge and tracking, trade data, production statistics, and independent reviews.</p>	<p>1. Use trade data to guide ongoing export development opportunities*</p>	<ul style="list-style-type: none"> Trade data maintained and data outputs supplied to meet stakeholder needs
	<p>2. Use Industry production benchmarking activity to measure and track industry productivity and profitability</p>	<ul style="list-style-type: none"> Availability of data to support extension activities and individual grower decision-making Evidence of data used to support industry-level decision-making and grower practice change
	<p>3. Increase industry alignment with quality and brand-positioning opportunities driven by consumer insights*</p>	<ul style="list-style-type: none"> Delivery of a consumer insights strategy Evidence that consumer insights inform market engagement (e.g., case studies) New consumer knowledge available for growers

* Foundational investments provide data and information that underpin the delivery of other SIP outcome areas and will be aligned to this strategy. Foundational investment areas include:

- Consumer behavioural data
- Consumer usage and attitudes, and brand health tracking data
- Impact assessments
- Trade data
- Crop protectant data.



Reporting framework

Hort Innovation will use dynamic reporting aligned to the Organisational Evaluation Framework to report regularly on progress and performance. Reporting will be processed through formal channels to inform industry and government investors.

A review of investment performance against the respective industry outcome and/or strategy-level KPIs for the apple and pear SIP will be completed annually as the primary reporting mechanism. The SIP performance report will provide:

- Evidence of progress towards achieving the industry-specific outcomes and strategies through an assessment of the KPIs identified in the SIP
- Evidence of progress towards cross-industry investment strategies and outcomes. It will involve Hort Innovation's whole-of-horticulture reporting obligations and corporate plan and involve annual reports and Hort Innovation's Annual Operating Plan.

SIP performance reports will also inform the Australian Government of progress towards achieving government priorities. In particular, reporting will support Hort Innovation to meet the Performance Principles and requirements contained in the [Deed of Agreement 2020-2030](#).



“The apple and pear SIP is the roadmap that will guide Hort Innovation’s oversight and management of the apple and pear industry’s investment programs.”



SECTION

4

COLLABORATION AND CROSS-INDUSTRY INVESTMENT

Based on advice from industry throughout the engagement process, Hort Innovation understands that Australian horticulture industries have common issues, and in turn have identified prospective areas for collaboration and cross-industry or regional investment.

These opportunities have been included as strategies across multiple industry SIPs where relevant and required. By delivering targeted multi-industry collaboration in research, development and extension (RD&E), marketing and international trade, Hort Innovation aims to support more effective and efficient outcomes for growers and the wider horticulture sector. This includes driving investment through the Hort Frontiers strategic partnership initiative. Importantly, while this approach acknowledges there is value in solving issues across industries and regions, it does not reduce the importance of industry-specific initiatives.

Cross-industry/regional R&D opportunities identified for the apple and pear industry include:

- Orchard management in a changing climate
- Biosecurity and fruit fly management
- Automation/mechanisation and orchard design
- Energy efficiency and renewable energy opportunities.

Cross-industry areas of collaboration for demand-driving outcomes provide the opportunity to advance the prosperity of the sector through gaining efficiencies in the delivery of the program and contributing to stronger overall outcomes. By collaborating as one sector to win the hearts and minds of the consumers, in addition to individual demand-driving programs, there is the potential to enhance the total category value proposition, contributing to driving returns for Australian growers.

Areas of consideration for collaboration for demand-driving outcomes across the lifespan of the 2022-2026 SIP include advice given by the SMP include:

- All-of-horticulture consumer marketing campaigns designed to drive awareness, consideration, and purchase behaviour change
- Communications to bring horticulture to top of mind (saliency) and reposition the benefits they provide to Australian and international consumers
- Retail partnerships to advance total category and shopper demand-driving programs
- A global brand platform to reinforce the unique selling proposition of Australian-grown horticultural produce and drive preference with international consumers.

Strategic science and research focus

The apple and pear SIP takes into consideration the research priorities of various industry stakeholders, including Apple and Pear Australia Ltd (APAL), the Apple and pear SMP, PomeWest and Australian Fresh Produce Alliance (AFPA), and acknowledges the representation of these organisations. In developing the strategies presented within the apple and pear SIP, the strategic research areas that were considered are listed in **Table 2**.



TABLE 2. Apple and pear research priorities

APAL Industry Strategy 2018-2023	AFFA strategic priority areas	Pomewest strategic priorities	Apple and pear SMP marketing strategies
<p>Market growth – targeting domestic and export opportunities increasing value to growers</p> <p>Supply chain management: Build intelligence across supply chain</p> <p>Industry sustainability – strive for world-class productivity, biosecurity and on farm practices</p> <p>Capability and capacity – Building industry and workforce skills to future proof Industry</p>	<p>Sustainability (climate change, water, packaging and shelf life)</p> <p>Trade (market access, industry capability development, technical exchange with export markets)</p> <p>Biosecurity (managing pest and disease, integrated pest management (IPM), chemistry)</p> <p>Food safety (systems and technology)</p> <p>Pollination (bees and flies, alternate pollinators, pollination in production systems)</p>	<p>Productivity and profitability</p> <p>Market development</p> <p>Supply chain improvement</p> <p>Industry leadership</p>	<p>Market growth: Domestic demand creation and volume/value growth*</p> <p>Supply chain management: Drive quality and customer experience from farm to in-home (including in-store strategy)</p> <p>Industry sustainability: Project Double Down</p> <p>Capability and capacity building: Strategic market development</p>

Collaboration across the agriculture research community is also essential, including with organisations such as universities, private enterprise and state government agencies. Hort Innovation is a member of the National Horticulture Research Network (NHRN) together with other senior horticultural R&D representatives from state and Australian Government agricultural agencies. The NHRN is responsible for the development and implementation of the broader Horticulture RD&E Strategy under the National Primary Industries RD&E Framework.

During the engagement process, key delivery partners were contacted including lead agencies within the NHRN Framework as well as specific delivery partners for each industry. The agencies involved with the apple and pear industry investment program were engaged during the development of this SIP to ensure consideration and strategic alignment of priorities for the industry. In addition, priorities and opportunities identified within the strategic plans of national and state agencies and research organisations have been considered in the development of Hort Innovations SIPs where applicable.

TABLE 3. Government and key agency priorities

Rural RD&E for Profit priorities	Australian Government Science and Research priorities
Advanced technology	Food
Biosecurity	Soil and water
Soil, water and managing natural resources	Advanced manufacturing
Adoption of R&D	Environmental change
	Health

This SIP has been developed alongside the government and key agency priorities listed in **Table 3**, with consideration of issues faced by the apple and pear industry. These strategic areas further emphasise the opportunity and importance of cross-industry and regional collaboration. All the priority areas are of importance to Australian horticulture, and these will play a role in driving the efficiency and effectiveness of investment across the sector.

Annual investment planning

Specific investments to address the SIP strategies and align with industry strategic priorities will be outlined in detail each year via the apple and pear AIP. Investment decisions are guided by the SIP and prioritised based on potential industry impact, as well as the availability of levy funds each year. The AIP will be developed with input from the apple and pear R&D SIAP and SMP, which is made up of growers and other industry representatives as well as IRBs and other key stakeholders. Wherever possible, investments will be aligned to form multi-industry projects to increase the efficiency of funding availability. Details of the SIAP and SMP can be found on the Hort Innovation website [here](#), and the AIP will be published on the same page each year.

Investment opportunities through Hort Frontiers

Innovation is key to the future success of Australian horticulture. The next evolution of the long-range, higher risk and transformational R&D that has the potential to make a significant impact will be possible through Hort Innovation's Hort Frontiers program strategic partnership initiative.

Hort Frontiers is a strategic partnership initiative that facilitates collaborative, cross-industry investments focused on the longer term and more complex themes identified as critical for Australian horticulture by 2030. The partnership framework is currently being established and will include a number of key investment themes for potential investment to guide the initiative and drive transformational R&D across horticulture. Key investment themes will include:

- Environmental sustainability (water, soil and climate)
- Pollination

- Green cities
- Biosecurity
- Health, nutrition and food safety
- Advanced production systems
- International markets
- Leadership
- Novel food and alternate uses (waste reduction).

The development of these areas for investment will benefit all of horticulture, with support from partners with aligned priorities to co-invest in deliverables identified that require alternative funds available outside the levy. Hort Frontiers is being developed to align with the Australian-grown Horticulture Sustainability Framework to invest in specific impact areas to drive innovation and sustainability initiatives.

The apple and pear industry views a number of these investment areas as opportunities for success into the future, including:

- Climate variability
- Pollination
- Transformational biosecurity
- Intensive production systems
- Farm automation
- Human health and nutrition
- International market
- Leadership.

Partnering with Hort Frontiers on these areas would provide the apple and pear industry with opportunities for access to world-class research, specialised project management teams and large-scale R&D.



Australian-grown Horticulture Sustainability Framework

Hort Innovation has developed the Australian-grown Horticulture Sustainability Framework report, aiming to strengthen the horticulture industry's sustainability to meet the changing expectations and needs of growers, consumers, the community, investors and governments. The report applies across the whole of Australian horticulture, including fruits, vegetables, nuts and nursery stock. Through widespread consultation with industry and external groups, proposed sustainability goals and indicators were identified and are detailed within the framework. The framework is aligned to the UN Sustainable Development Goals.

Four key pillars were identified in the framework (*Figure 1*).

FIGURE 1. Four key pillars of the Australian-grown Horticulture Sustainability Framework



The framework should be cross-referenced when undertaking prioritisation of investments. At the time of publication, Hort Innovation is working with industry groups regarding the overall responsibility for the framework, setting and reporting progress against the framework targets and performance measures.

View the Australian-grown Horticulture Sustainability Framework on the Hort Innovation website [here](#).

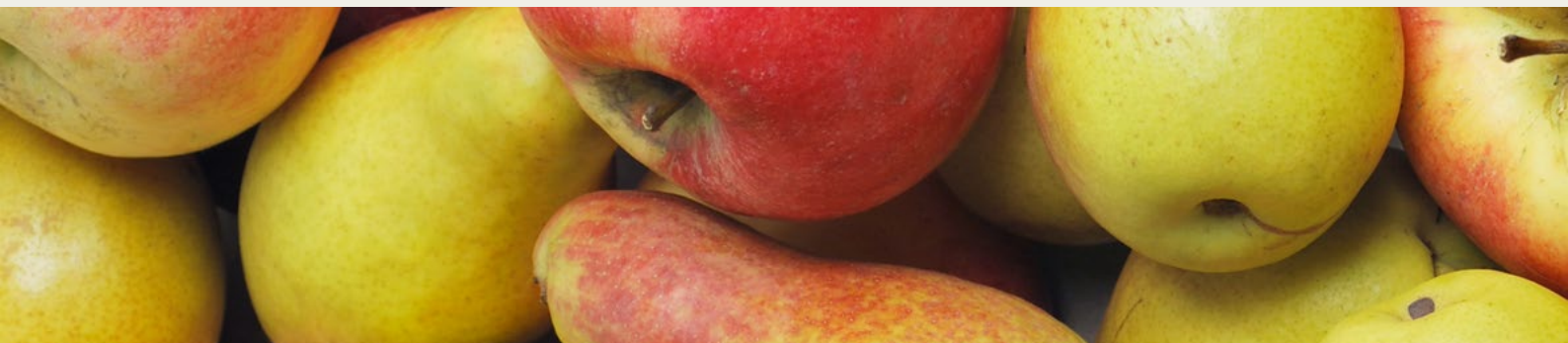


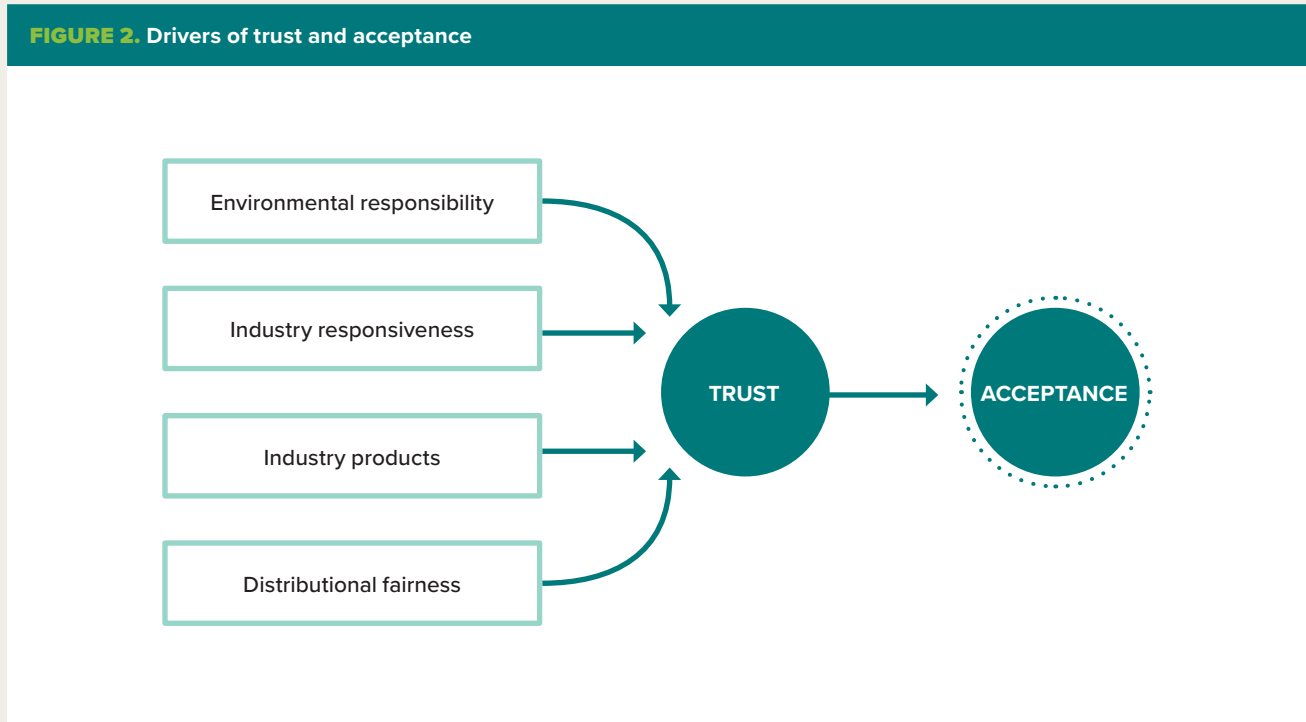
Table 5 provides an example of an apple and pear SIP strategy showing how the industry is already aligning to the framework.

TABLE 5. An apple and pear SIP strategy example showing how the industry is already aligning to the Australian-grown Horticulture Sustainability Framework

STRATEGY	IMPACT	SUSTAINABILITY GOAL
Enhance sustainable orchard system design and management to optimise orchard profitability through improvements in input efficiencies and quality improvements	<ul style="list-style-type: none"> Internationally competitive and profitable orchards through efficient resource use (e.g., labour and water), crop protection, nutrition, yield and quality, and adaptation to climatic and environmental changes Optimisation of orchard systems for automation, mechanisation and efficiencies of orchard inputs 	Planet & Resources

In addition to the above, there is an opportunity for the apple and pear industry to examine the main drivers of community trust in and acceptance of Australian rural industries, as well as the evolving the carbon market, including carbon farming, sequestration and related opportunities. The approach is such programs can be the catalyst for product and industry differentiation, drive investment, create industry growth and generate value to consumers. This would align to the Australian-grown Horticulture Sustainability Framework (see page 22 of this SIP), which aims to strengthen the horticulture industry’s sustainability practices to meet the changing expectations and needs of growers, consumers, community, investors and governments.

As part of a sustainability focus relating to People & Enterprise, the apple and pear industry will seek to examine the main drivers of community trust in and acceptance of Australian rural industries, as well as the evolving the carbon market, including carbon farming, sequestration and related opportunities. The approach is such programs can be the catalyst for product and industry differentiation, drive investment, create industry growth and generate value to consumers. Figure 2 maps the main drivers of trust and acceptance, which underpins this area of work.



Source: Voconiq (2021) Community Trust in Australia’s Rural Industries: Year 2 national survey

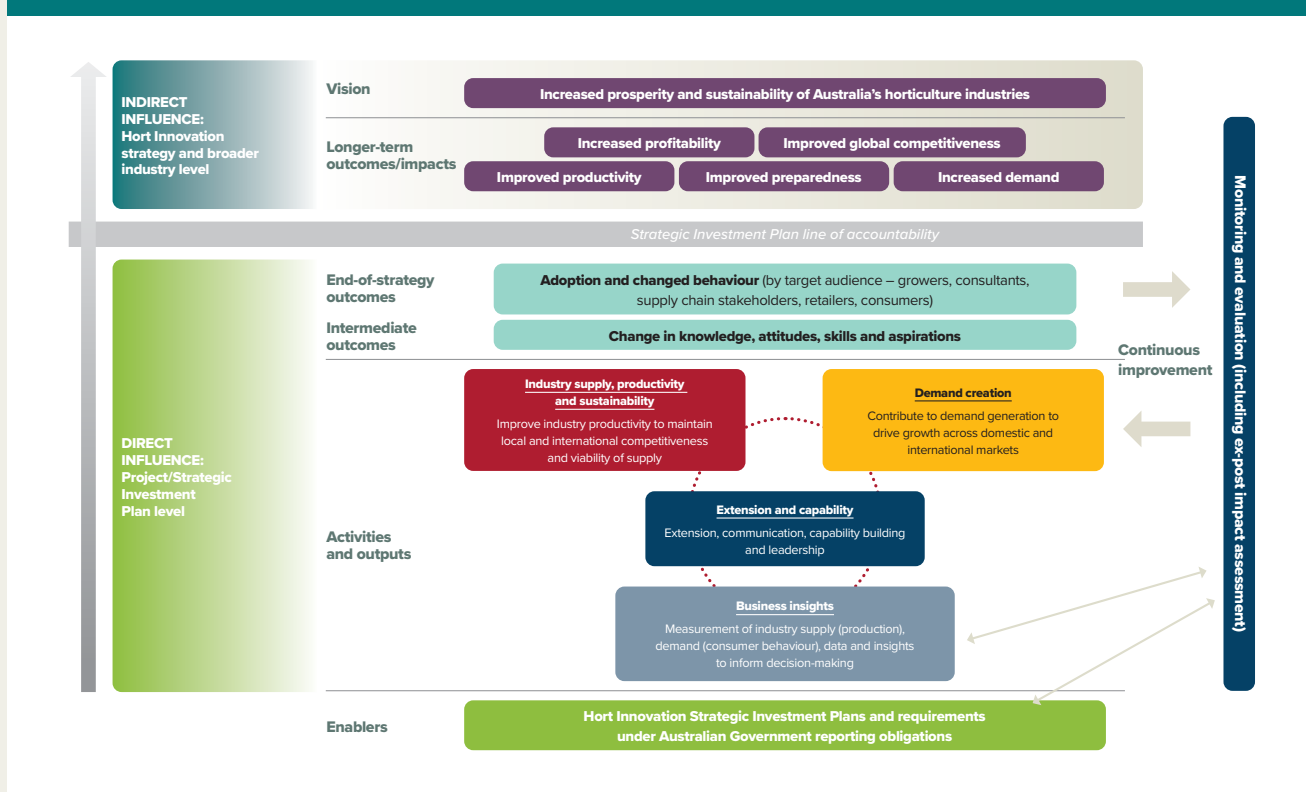
HORT INNOVATION



Strategic Investment Plan logic

The Strategic Investment Plan logic (**Figure 3**) identifies how investment activities and outputs (delivered through each SIP outcome area) will support changes in industry KASA, which drive adoption and behaviour change. Beyond the SIP, investment will contribute to driving longer-term impacts for the sector like increased preparedness, demand, productivity, global competitiveness and profitability. Realising these impacts will support Hort Innovation’s vision of increased prosperity and sustainability of Australia’s horticulture industries.

FIGURE 3. Strategic Investment Plan logic



Aligning to Hort Innovation investment priorities

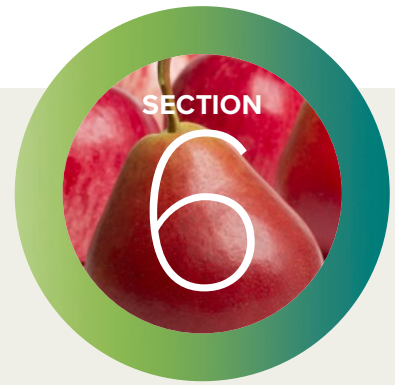
Hort Innovation is committed to sustainable growth in horticulture, with the overarching aim of increasing the sector’s value to \$20 billion by 2030. We will do this through implementing the SIP and investments against the three core pillars, committed to:

1. Drive knowledge and innovation into horticulture industries
2. Deliver the highest value R&D, marketing and international trade investments across industries now and into the future
3. Enable activities that drive all strategic imperatives.

Hort Innovation is governed by a Deed of Agreement with the Australian Government, which allows for the transfer

and investment of levies and Australian Government contributions. As a Research and Development Corporation (RDC), Hort Innovation is able to leverage industry levy investments in RD&E with Government funds up to a value of 0.5% of the industry’s gross value of production. All investments made by Hort Innovation are thoroughly considered to ensure they contribute to the guiding performance principles:

- Productivity
- Profitability
- Preparedness for future opportunities and challenges
- Competitiveness
- Demand: demonstrates how productivity, preparedness and demand lead to profitability and competitiveness and sustainability.



APPENDICES

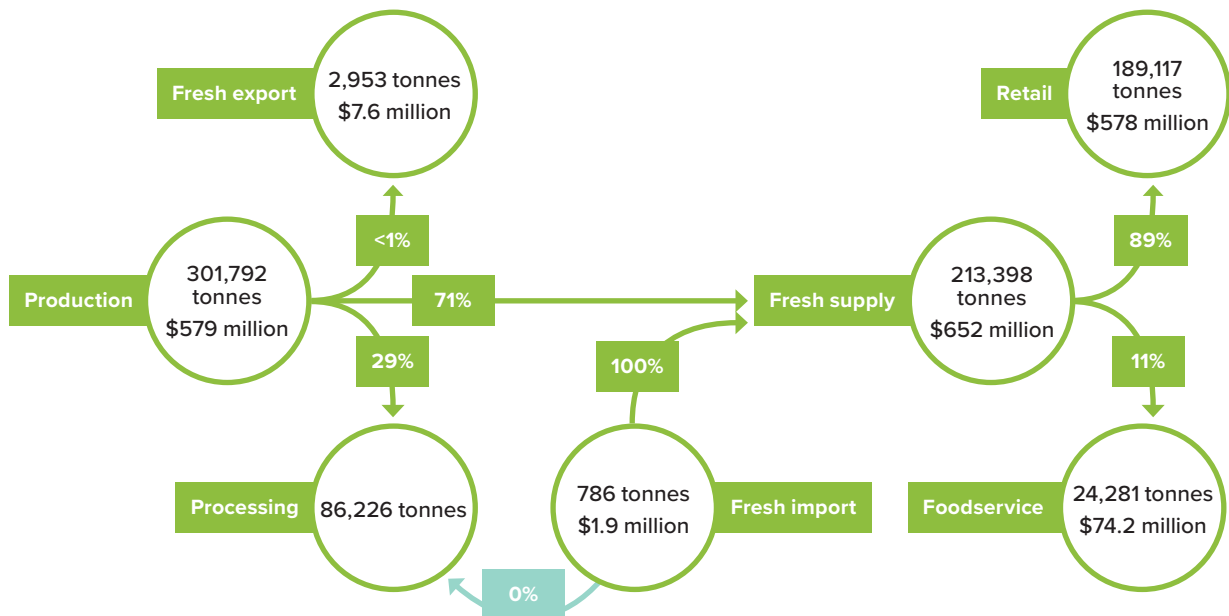
APPENDIX 1: Industry context

Apples

Industry supply chain

Apples are grown across all states and territories except for the Northern Territory. Victoria produces the most apples at 46% of production volume. The rest of production is split relatively evenly among the remaining states, with New South Wales making up 14%, followed by Queensland, Tasmania, Western Australia and South Australia all at 10%. This structure has remained the same for the past five years, with the only change of note being a reduction in production share from New South Wales from 16% to 14%.

FIGURE 4. Apple supply chain, 2019/20



Source: Australian Horticulture Statistics Handbook (2019/20)

Apples are grown mainly for the domestic fresh market, but there is a significant processing market making up 29% of total production, compared to 19% for all fruit. There is minimal trade in apples, with only 1% of production exported and an even smaller amount imported. Foodservice accounts for 11% of fresh supply, which is just below the share for all fruit of 12% (Figure 4).

Domestic consumers and drivers of demand

71% of apple production is sent to the domestic market, of which approximately 90% is sold through retail outlets. The high industry reliance on the supermarket channel reinforces the importance of supermarket category management.

Total per capita consumption of apples has declined steadily, but fresh consumption has declined at a much slower rate, suggesting the decline is in processed apples.

Some reasons for the declining consumption of apples are:

- Strong competition in the snacking and convenience channel, especially healthy snacks
- Increasing year-round availability of other fruits such as berries and declining prices of these substitutes
- No defined distinctive health attribute.

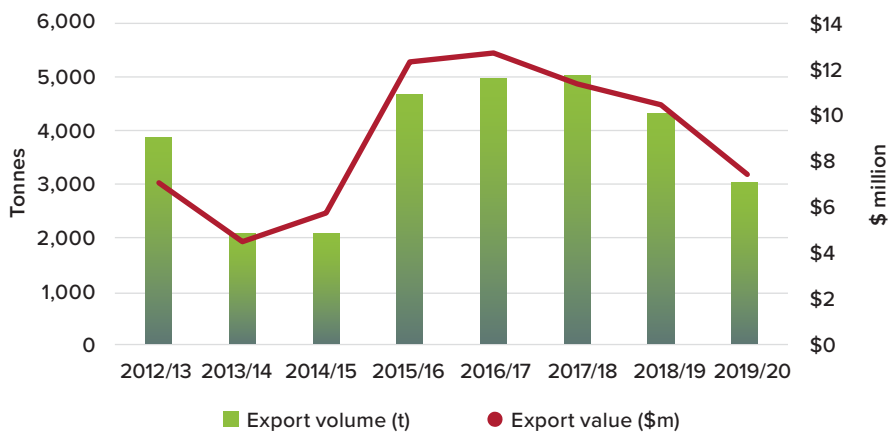
Imports have had minimal impact on the domestic market, as consumers have a strong preference for Australian-grown apples. Imports declined to 786 tonnes in 2019/20, which is less than 0.4% of fresh supply.

Export markets

Investment in exports is a strategy to maintain domestic market buoyancy. It is the only way to keep domestic market prices healthy as production grows.

In 2002, apple exports accounted for 10% of total production, but now accounts for less than 1% of production. Whilst apple and pear exports certainly reached their historically lowest point in the past 20 years, it is important to note in the five years preceding COVID-19 (2015-2019), Australia exported 43% more apples than five years earlier (2010-2014).

FIGURE 5. Apple exports, 2012/13 to 2019/20

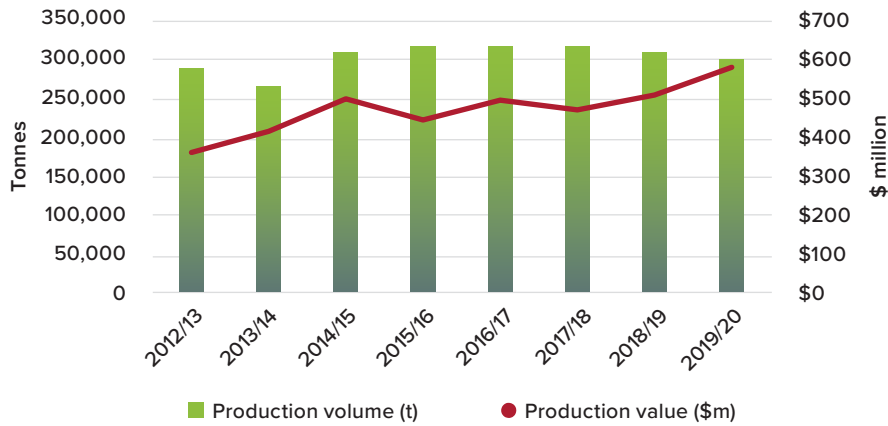


Source: Australian Horticulture Statistics Handbook (2019/20)



Industry production

FIGURE 6. Apple production, 2012/13 to 2019/20



Source: Australian Horticulture Statistics Handbook (2019/20)

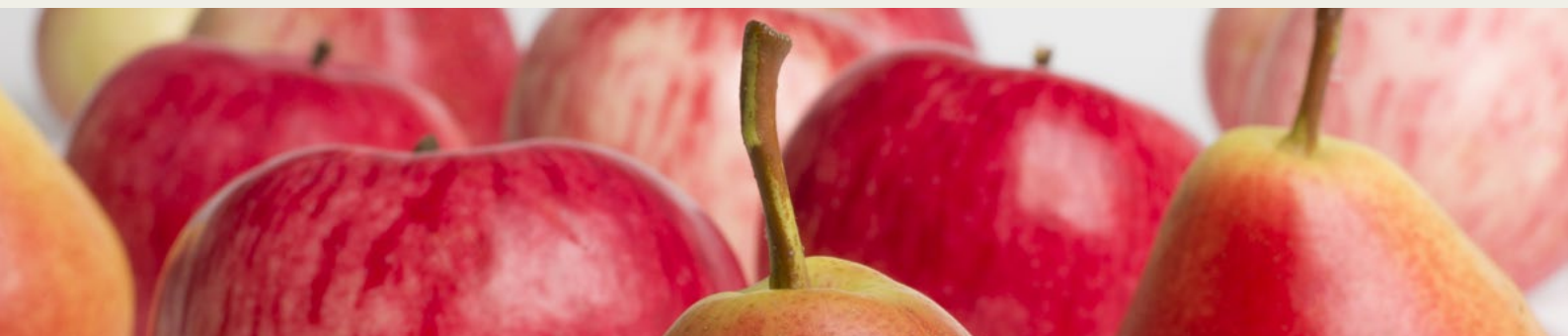
Apple production is relatively flat compared to other Australian temperate fruit industries at around 300,000 tonnes. Production volume has declined over the past three years from a peak of 319,686 tonnes in 2016/17 to 301,792 tonnes in 2019/20, largely due to drought conditions across eastern Australia (Figure 6).

Year-to-year fluctuations in production value are due to market pricing, seasonal conditions and pack-out variability. Over the past two years, there is an indication that lower supply has driven up the price for apples, allowing the industry to reach its peak of \$579 million in 2019/20, up from \$465 million in 2017/18.

The industry is progressing according to the following trends:

- Planting of club varieties
- New plantings being intensive and high density
- Increasing use of netting
- Investment in automation or preparing for automation
- Growers investing in soil health and integrated pest and disease management.

Apple prices are highly sensitive to supply, which means that orchard income can reduce in high production years. Specialty and club varieties achieve a significant premium over commodity lines which highlights to industry the opportunity for greater production. Although there is a large amount of seasonal variability, on a long-term basis, income has kept up with cost reduction largely due to yield increases.

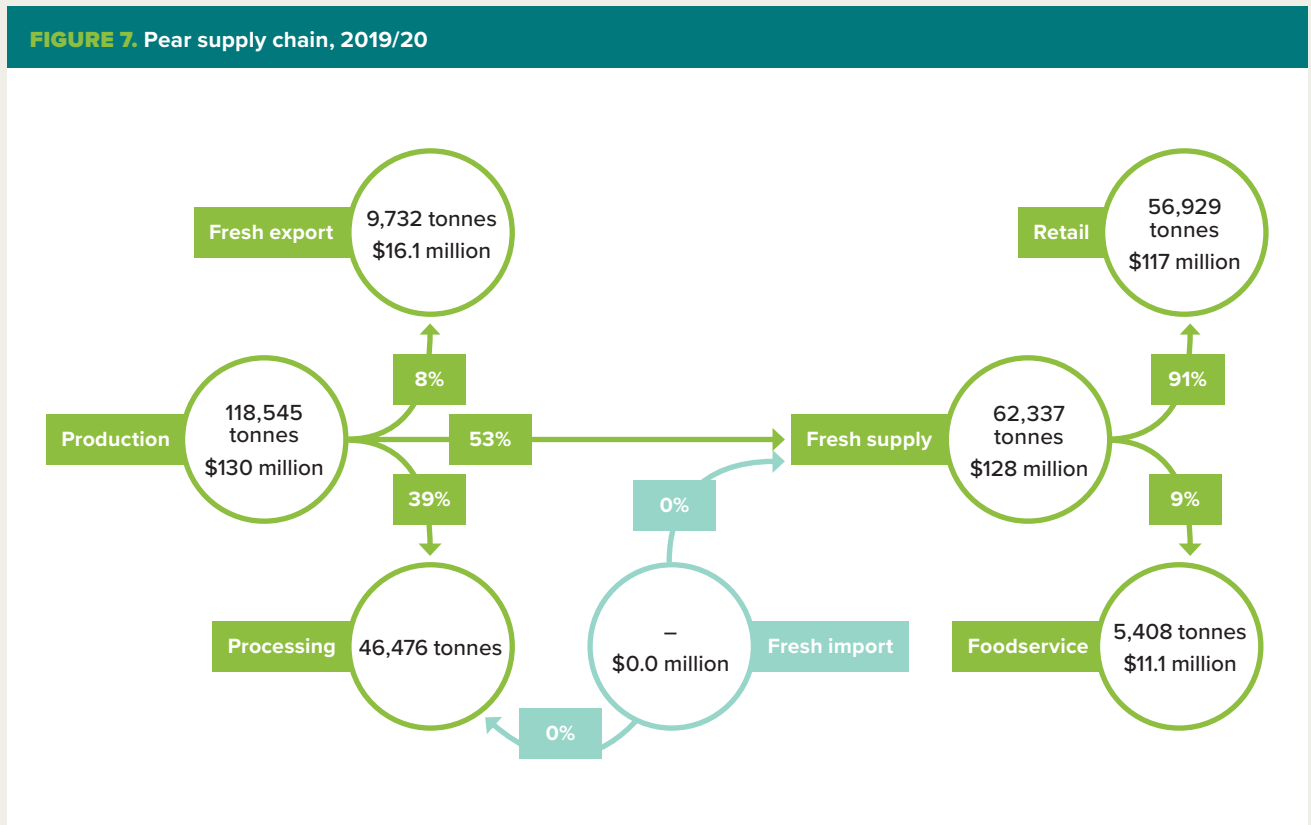


Pears

Industry supply chain

Pear production has declined significantly since the mid-2000s reflecting the shift away from lower value, large processing volumes to higher value fresh varieties and rising exports.

In the last five years, however, the industry has reached more of a mature state with little change in structure. 39% of production was sent to processing in 2019/20, the same proportion as in 2014/15. The proportion exported has also remained stable, with 8% of volume exported in 2019/20 compared to 7% in 2014/15 (*Figure 7*).



Source: Australian Horticulture Statistics Handbook (2019/20)

Pears have one of the most diversified supply chains of all horticultural products, with only 53% of their production grown for the domestic fresh market. The balance is filled by processing, at 39% of production, and exports at 8%. Pears send the highest proportion of their production to processing than any fruit other category. Foodservice is a relatively small market, making up 9% of fresh supply, less than the average for all fruit categories of 12%. Pear exports have been consistently growing over the past decade – whilst there are fluctuations, the trend line is very clear.



Export markets

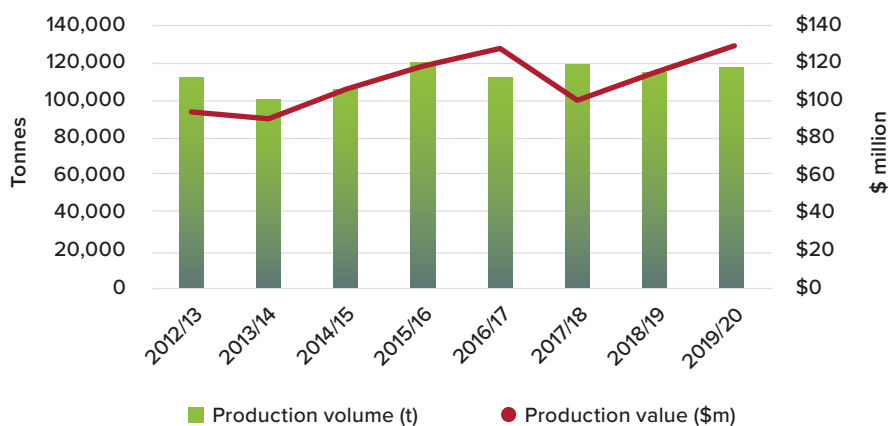
FIGURE 8. Pear exports, 2012/13 to 2019/20

Source: Australian Horticulture Statistics Handbook (2019/20)

Pear exports have largely followed the trends of total production. For example, in each year since 2012/13, a positive or negative change in production volume was also mirrored in export volume. This indicates that the domestic market is maintained at a point of relative stability while production surplus to domestic requirements is sent to the export market (*Figure 8*).

The largest pear export destination in 2019/20 was New Zealand at 33% of production volume. The pear industry has taken the opportunity to rebuild the Indonesian market after supply failure from South Africa, with Indonesia now the second largest export destination at 17%. Singapore (16%), Canada (9%) and New Caledonia (6%) are the other major export destinations.

Industry production

FIGURE 9. Pear production, 2012/13 to 2019/20

Source: Australian Horticulture Statistics Handbook (2019/20)

As noted previously, the pear industry is now mature, characterised by consistent production volumes and gradually increasing production value. Peak production was achieved in 2015/16 at 120,194 tonnes, with production in 2019/20 just below this at 118,545. Production value, however, peaked in 2019/20 at \$130 million, higher than that achieved in 2015/16 at \$116 million, indicating that prices have increased over this time (*Figure 9*).

APPENDIX 2: Apple and pear industry situation analysis

At the time of refreshing the SIP in 2021, the global coronavirus (COVID-19) pandemic continues to affect horticulture industries to varying degrees. Although the outcome and ultimate impact of the pandemic are unknown, areas of investment across horticulture that may be influenced over the period of this SIP include export and trade relationships, domestic and international demand, logistics and supply chain, labour supply – all having potential impacts on grower profitability.

Environmental, economic and social sustainability are vitally important to Australian horticultural growers and industries. Customers, consumers, and investors also seek information about the sustainability and ethics of how their food is produced. Sustainability is particularly crucial as topics such as climate variability, health and ethics continue to shape the social, environmental, and political landscape for agricultural industries. The impact of these issues may have influence on a whole range of investment areas for horticulture from production practices and land management, demand and reputation of products, quality expectations and cultural/community engagement.

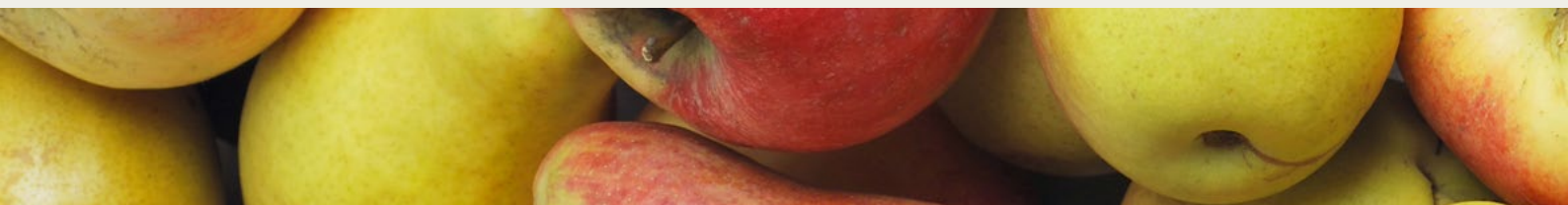


Strengths, weaknesses, opportunities and threats

Table 6 has been used to analyse the apple and pear industry's strengths, weaknesses, opportunities, and threats (SWOT). The SWOT tool assists the industry to build on what works, observe what is lacking, minimise risks, and take the greatest possible advantage of chances for success.

TABLE 6. Apple and pear SWOT analysis

The apple and pear industry	
Strengths	<ul style="list-style-type: none"> • The top quartile of growers is achieving world's best practice productivity levels • The large geographic spread of production areas and the associated microclimates enable • Australian growers to produce great variety of a wide range of products, over a long seasonal window • Access to a range of varieties that can be customized to particular export markets • Tasmania's PFA status • Strong consumer support for Australian apples and pears in the domestic market as evidenced in previous campaigns (e.g., 'Hailstorm heroes' and 'Aussie Apples' campaigns)
Weaknesses	<ul style="list-style-type: none"> • Higher input costs relative to competitors • Lower and more variable yield than competitors • Inconsistency in delivering good eating experiences • How poorly apples demonstrate their overall versatility and how the category does not sufficiently differentiate the offering between varieties • Lack of market access into potential markets • Under-representation in non-supermarket channels • Lack of reliable data on tree plantings and crop forecasts to inform investment decision-making
Opportunities	<ul style="list-style-type: none"> • To take advantage of the world's best scientific knowledge in agronomy, packaging and pests and disease management • Promoting the specific health benefits of apples and pears to take advantage of the growing trend towards healthier foods • The growing demand for quality fruit in nearby Asian and Middle Eastern markets • The industry financial resources available to invest in market development
Threats	<ul style="list-style-type: none"> • An oversupply depressing prices to uneconomic levels • Confusing for consumers, too many similar varieties • Threat of biosecurity incursion • Social licence (domestic and international) • Decreased consumption due to concern about sugar/fructose • Food safety incident and threat of litigation



APPENDIX 3: People consulted

The following people are acknowledged for their contribution to the apple and pear SIP development process.

NAME	INDUSTRY ROLE	REGION
Rosalie Daniel	Apple and pear R&D SIAP; Apple and Pear Australia Limited	Victoria
John Evans	Apple and pear R&D SIAP; Grower	Tasmania
Terry Martella	Apple and pear R&D SIAP; Grower	Western Australia
Kevin Sanders	Apple and pear R&D SIAP; Grower	Victoria
David Williams	Apple and pear R&D SIAP; Researcher	Victoria
Peter Hall	Apple and pear R&D SIAP; Grower	Victoria
Garry Langford	Apple and pear R&D SIAP; Consultant	Tasmania
Robert Green	Apple and pear R&D SIAP; Grower	South Australia
Glyndon Flavell	Grower	South Australia
Elisa King	Grower representative (Kanzi)	Victoria/South Australia
Jeremy Griffith	Apple and Pear Australia Limited	Victoria
Lindy Nieuwenhuizen	Apple and Pear Australia Limited	Victoria
Justin Smith	Apple and Pear Australia Limited	Victoria
Michael Stafford	Grower	South Australia
Bruce Rosengarten	Apple and pear SMP	New South Wales
Scott Price	Grower	Tasmania
Phil Turnbull	CEO, Apple and Pear Australia Limited; Apple and pear SMP	Victoria
Andrew Hooke	COO, Apple and Pear Australia Limited; Apple and pear SMP	Victoria
Cameron Carter	Grower; Exporter; Apple and pear SMP	New South Wales
Mitchell McNab	Grower; Apple and pear SMP	Victoria
Nardia Stacy	Pomewest; Apple and pear SMP	Western Australia
Cathy Zepieri	Apple and pear SMP	New South Wales
Nicole Giblett	Grower	Western Australia
Michael Tarbath	Fruit Growers Tasmania	Tasmania



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APPENDIX 5: List of acronyms

AFPA	Australian Fresh Produce Alliance
AIP	Annual Investment Plan
APAL	Apple and Pear Australia Limited
APVMA	Australian Pesticides and Veterinary Medicines Authority
BMP	best management practice
CSIRO	Commonwealth Scientific and Industrial Research Organisation
EPPR	Emergency Plant Pest Response
FY	financial year
IRB	Industry Representative Body
KASA	knowledge, attitudes, skills and aspirations
KPI	key performance indicator
M&E	monitoring and evaluation
MRL	Maximum Residue Limit
NHRN	National Horticulture Research Network
PFA	Pest Free Area
PHA	Plant Health Australia
R&D	research and development
RDC	Research and Development Corporation
RD&E	research, development and extension
RRA	Regulatory Risk Assessment
SARP	Strategic Agrichemical Review Process
SIAP	Strategic Investment Advisory Panel
SIP	Strategic Investment Plan
SMP	Strategic Marketing Panel
SWOT	strengths, weaknesses, opportunities and threats

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