

FEBRUARY 2022

Raspberry and blackberry

Strategic Investment Plan 2017-2021

PERFORMANCE REPORT



Raspberry and blackberry SIP performance report

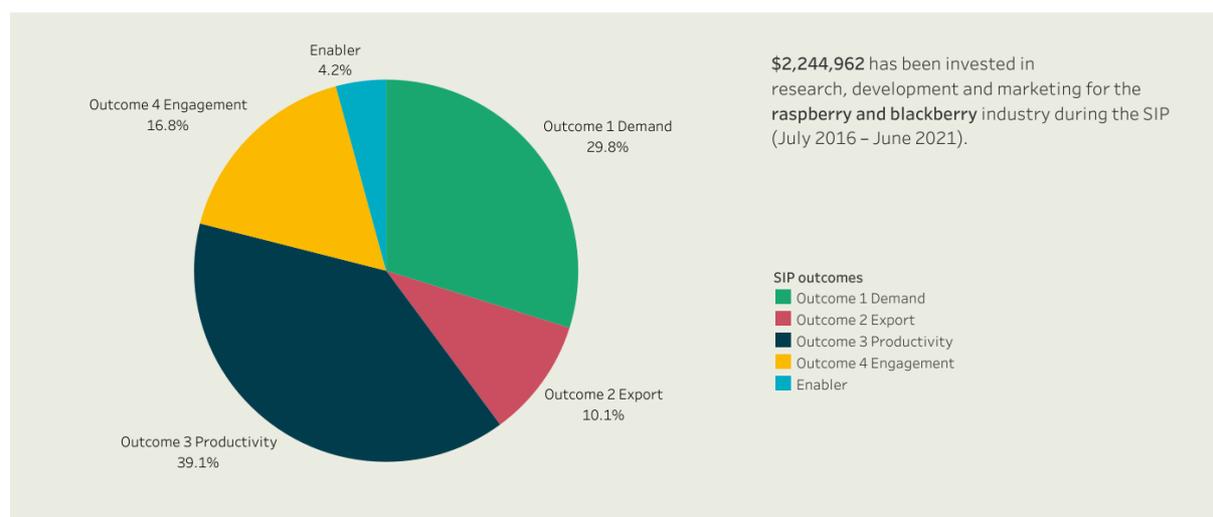
This performance report reviews the performance of levy investments delivered against the raspberry and blackberry Strategic Investment Plan (SIP), which was active for the 5-year period from 2016/17 to 2020/21. The SIP was developed to strategically guide research and development (R&D) and marketing levy investment in accordance with core industry priorities. The SIP featured four outcome areas, 13 strategies and 14 key performance indicators (KPIs), summarised in Table 1. A total of \$2.2 million was invested into the Raspberry and Blackberry Fund over the 5-year period of the SIP. The total investment expenditure allocated against each outcome is provided in Figure 1.

Table 1: Raspberry and blackberry SIP outcomes

Outcome	Description	Expenditure allocation*
1. Demand	By 2021, domestic per capita consumption of fresh Australian raspberries will increase by at least 4%, supported by positive consumer perceptions of product value	29.8%
2. Export	By 2021, exports of Australian raspberries will exceed 5% of national production by volume, in selected markets with a capacity and willingness to pay a premium for quality fruit	10.1%
3. Productivity	By 2021, the industry will increase farm productivity (marketable yield per hectare) by an average 10%	39.1%
4. Engagement	By 2021, at least 90% of growers and other firms involved in raspberry and blackberry value chains will be directly engaged with and value national industry services	16.8%

*Total investment \$2.2 million as of June 2021. Balance of expenditure comprises of enabler investments, which includes expenditure to support the delivery of the SIP including advisory meeting and publication costs.

Figure 1: Raspberry and blackberry SIP investment expenditure analysis



SIP performance analysis

This performance report reviews the investment achievements delivered within each outcome area that have generated impact for growers. The overall status of each strategic area, informed through an assessment of KPI performance, is also provided. The evaluation status and criteria were:

Strategic area status	Criteria
Achieved	KPIs for this strategic area were met
In progress	Investment delivery remains ongoing
Not achieved	Investment was not prioritised in this strategic area

The results have been informed from evidence compiled through reviewing investment documentation and engagement with project managers. Outcomes generated through the investments are documented and brief case studies of flagship performance and impact for each outcome area are also provided.

Outcome 1: Demand – By 2021, domestic per capita consumption of fresh Australian raspberries will increase by at least 40%, supported by positive consumer perceptions of product value

The strategic intent was to sustain prices and margins as production continued to expand.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support raspberry and blackberry demand are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Establish and monitor consumer perceptions and expectations towards fresh Australian raspberries and blackberries	Achieved
Promote the health benefits and value associated with eating raspberries and blackberries	Achieved
Provide timely information on industry production, forecasts and markets	Not achieved
Manage risks to the Australian industry's reputation as a reliable supplier of superior quality, safe products	Not achieved

KPI callouts:

- The *Australian Horticulture Statistics Handbook* (HA18002) reported that the average domestic supply per person of fresh Australian raspberries and blackberries over the 5-year term of the SIP was 159% higher than levels prior to development of the SIP, well above the target of 40%.
- For blackberries, household penetration increased from 24.4% (2019) to 30.9% (2021), while average annual purchase volume per household increased from 0.4 kg to 0.7 kg. For raspberries, household penetration decreased from a peak of 43.7% (2019) to 32.7% (2021), while average annual purchase volume per person increased from 1.0 kg to 1.1 kg (Nielsen IQ Homescan data).
- The ongoing *Harvest to Home* data facilitated through project *Consumer behavioural and retail data for fresh produce* (MT17015), allowed growers to access latest consumer behavioural data which demonstrated trends in the way consumers were engaging with raspberries and blackberries.
- The project *Raspberry and blackberry consumer insights research* (RB18000) identified four opportunities to expand consumer market growth: building value; product differentiation; leveraging occasions beyond snacking; and driving freshness and quality.
- The *Australian raspberry and blackberry PR and social media program* (RB18501 and RB18502) educated and reminded shoppers and consumers of the benefits of fresh raspberries and blackberries. The Fresh Australian Berries Facebook page achieved 1.1 million opportunities for people to see the content, and an average engagement rate of 11%. The freshaussieberries Instagram page achieved 589,000 opportunities for people to see berry content and delivered over 60,000 engagements (likes and comments).

Outcome 2: Export – By 2021, exports of Australian raspberries will exceed 5% of national production by volume in selected markets with a capacity and willingness to pay a premium for quality fruit

The strategic intent of this outcome was to diversify into selected export markets for fresh raspberries as a means of reducing the industry’s dependency on the domestic market, especially during seasonal production peaks.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support raspberry exports are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Develop a raspberry export strategy during 2017 by working directly with current/potential exporting businesses	Achieved
Develop and extend resource material required by businesses to enter and develop exports with existing markets	In progress
Establish technical market access for new markets identified as priorities in the export strategy	In progress

KPI callouts:

- The *Australian Horticulture Statistics Handbook* (HA18002) reported that while the average export volume over the 5-year period of the SIP was 85% higher than levels prior to development of the SIP, increasing from 5 tonnes to 9 tonnes, the export share of production remained below 1%, and below the target of 5% production volume. This was primarily due to the strong domestic consumption that absorbed the increased production.
- Funded by the raspberry, blackberry and strawberry industries, the *Berry Export Strategy* (MT17001) provided a thorough assessment of multiple industries for export. The strategy identified, and prioritised opportunities for the industries in international markets over a 10-year horizon. Identified export market opportunities included Singapore, Hong Kong, Malaysia, Thailand, New Zealand, Macau, UAE, Indonesia and the UK in the short-medium term; and China, Vietnam, Taiwan, Japan, the USA, and Canada in the medium- to long-term.

Outcome 3: Productivity – By 2021, the industry will increase farm productivity (marketable yield per hectare) by an average 10%

The strategic intent of this outcome was to identify, document and promote production practices that had been proven to optimise returns and reduce risk to growers.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support raspberry and blackberry productivity are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Facilitate availability of superior blackberry varieties that match consumer expectations	Achieved
Protect the high biosecurity status of the raspberry and blackberry industry	Achieved
Establish the main constraints and influences for increasing raspberry and blackberry industry productivity	Achieved
Inform growers on the emerging options, risks and opportunities afforded by protected cropping systems	Not achieved

KPI callouts:

- The multi-industry investments *Improving the biosecurity preparedness of Australian horticulture for the exotic spotted wing drosophila* (MT17005) and *Developing IPM-compatible controls for spotted winged drosophila* (MT18010) decreased the biosecurity threat posed by the spotted wing drosophila by reducing both the likelihood of incursion and the production impact in the event of an incursion.
- The *Australian Horticulture Statistics Handbook* (HA18002) reported that production of raspberries and blackberries grew from 4,974 tonnes in 2015/16 to 11,123 tonnes in 2020/21. This growth represents a compound annual growth rate (CAGR) of 17.5% over the 5-year period of the SIP. Over the same period production value grew from \$128 million to \$233 million, reflecting a CAGR of 13%.

Case study: Integrated pest management of redberry mite, *Acalitus essigi*, on blackberries (RB17000)

From 2017 to 2020, this project identified and assessed the impact of integrated pest management (IPM) strategies on the sustainable control of redberry mite in commercial blackberry production systems in Australia. Monitoring protocols were also developed to enable a more predictive approach to managing redberry mite.

The project team interviewed growers to examine on-farm management systems, conducted a national fruit survey to assess redberry mite distribution and prevalence, and implemented IPM field trials at commercial production sites in the Yarra Valley and in Tasmania. The trials consisted of both predatory mite releases and a spray reduction trial, with redberry mite and predatory mite populations monitored on both blackberry fruit and within winter buds.

The results indicated that crop losses are more common in later season cultivars. Cultural control strategies including wild blackberry removal, cultivar selection and crop hygiene were highlighted as IPM strategies to limit redberry mite populations.

The spray reduction trial confirmed that the spray program currently used by many Australian producers successfully reduces redberry mite populations but also has severe impacts on predatory mite populations. It was found that the adoption of a 'softer' chemical management program reduces redberry mite populations without impacting on predator populations or fruit quality.

All project outcomes were extended to industry using online resources and updates that achieved a 51% open rate, three workshops in Tasmania and Victoria that were attended by 34 stakeholders, as well as updates in the industry magazine and traditional news media.

Outcome 4: Engagement – By 2021, at least 90% of growers and other firms involved in raspberry and blackberry value chains will be directly engaged with and value national industry services

The strategic intent of this outcome was to build the capability for collection, analysis and the dissemination of information to inform business decisions and meet consumer demand.

Summary of strategic area and achievement status:

The strategies in the SIP that were identified to support raspberry and blackberry industry engagement are listed below. An achievement status is provided based upon internal evaluation of project performances:

Strategic area	Status
Develop an informed and cohesive industry through direct two-way communications with raspberry and blackberry businesses across Australia	Achieved
Provide timely information on industry production, forecasts and markets	Not achieved

KPI callouts:

- The project *Engaging leaders in the Australian horticulture industry* (LP16001) supported the development and engagement of a community of industry leaders – the Horticulture Alumni – brought together by a common desire to lift the bar for Australia’s horticulture sector. Across two years, the investment facilitated opportunities for the alumni to come together to network, collaborate and learn, with a particular focus on leadership development.
- The project *Facilitating the development of the Australian berry industries* (MT18020) supported Australian berry growers to adopt improved practices on-farm and keep up to date with the latest industry news, information, resources and technologies. The project delivered a nationally coordinated but locally implemented program that employed a dedicated raspberry and blackberry Industry Development Officer (IDO) in Tasmania in coordination with IDOs across all major berry growing regions who provided specialist skills and knowledge to berry growers.