

## **Final Report**

# **Summerfruit market access and trade development project**

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**Delivery partner:**

Summerfruit Australia

**Project code:**

SF19000

**Project:**

Summerfruit market access and trade development project (SF19000)

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## Public summary

The Australian Stonefruit Industry undertook SF19000 - Summerfruit Market Access & Trade Development - to *'further focus the Australian Stonefruit industry into a range of current and new countries including but are not limited to; China, Singapore, Malaysia, Hong Kong, Indonesia, Thailand, Canada, UAE, India, Philippines, NZ, Vietnam, USA'*.

Project SF19000 had been designed and was implemented to:

- a) Maintain and further develop the Chinese market that was focussed a robust supply chain to ensure importers and retailers received consistent fruit every year.
- b) Maintain and expand the markets in Thailand, Taiwan, Indonesia, India, Saudi Arabia, UAE, Canada and the Philippines by focussing on the development of the export capability of the Australia industry.
- c) Work towards achieving Market Access to Vietnam, USA, Japan, South Korea and New Zealand.

Leading into Project SF19000 the Australian Stonefruit industry had achieved records in volume and value as per the following: -

- 2018/19 season the industry exported 23,013 tonnes of nectarines, peaches, plums and apricots worth \$88.95 million, achieving a unit value of A\$3.87. **This was a new record result for volume, value and unit value.**
- 2019/20 were 21,269 tonnes worth A\$89.10m. While the result was 7.7 per cent lower than 2018/19 the unit values were 9 per cent higher and this has meant the overall value increased by 0.2 per cent.

Project SF19000 covered the seasons from 2020/21 to 2023/24. During that period the industry faced a number of major issues including the on-set of the worldwide COVID-19 pandemic and devastating weather condition in the 2022/23 season. As a result of these 'events' exports declined in volume and total value, but the unit price continued to reach high levels. 2023/24 saw exports rebound and while not back to the record of 2018/19 in volume the value of sales reached a record level and the unit price was stable in comparison with 2022/23.

The past four export seasons are detailed below with the following values and results: -

Year	Tonnes	Value	Unit price
2020/21	20,981	\$92.05 million	\$4.39
2021/22	17,488	\$79.33 million	\$4.54
2022/23	14,601	\$67.15 million	<b>\$4.60</b>
2023/24	20,774	<b>\$95.28 million</b>	\$4.59

While the volume levels declined across the 2021/22 and 2022/23 seasons there was still robustness within the export supply chain to maintain exports and in some instances grow the markets. The fact that in 2023/24 exports rebounded strongly (43% up) highlights the robust and resilient nature of the Australian Stonefruit Industry.

In addition to achieving these records Summerfruit Australia Ltd, through the engagement with and assistance of the Department of Agriculture, Fisheries and Forestry (DAFF) achieve market access for Australian peaches and nectarines to Vietnam in February 2022. Further to that, negotiations for plums to Vietnam progressed during the latter period of the project and the industry is hopefully of achieving access in the second half of 2024.

This highlights the successful achievements, during difficult times, of the above detailed purposes and associated activities of Project SF19000.

## Keywords

Summerfruit, Stonefruit, Peaches, Plums, Nectarines, Apricots, Trade; Market Access; Vietnam; China; Export; MRLs.

## Introduction

Market Access and Market Development/Maintenance are the two highest priorities for the Australian Stonefruit Industry as highlighted within the Summerfruit Australia Ltd '2020 Road Map'.

**Summerfruit Australia Ltd has a goal to take exports of Australian Stonefruit to 40,000 tonnes by 2030. This includes increasing the export tonnes to China, India and Indonesia and adding additional tonnages to potentially new markets of Vietnam, South Korea and Japan.**

SF19000, as a three-year project/program, aimed to achieve an increment growth of exports of 1700 tonnes per annum (taking the exports from 23,000 tonnes to 28,100 tonnes) and achieving access to at least two new export destinations.

While, in broad terms the objective of SF19000 was to *'further focus the Australian Stonefruit industry into a range of current and new countries including but are not limited to; China, Singapore, Malaysia, Hong Kong, Indonesia, Thailand, Canada, UAE, India, Philippines, NZ, Vietnam, USA'* Summerfruit Australia Ltd proposed the following more definitive priorities: -

- a) Maintenance and further development of the Chinese market.
- b) Maintenance and major expansion of the markets in Thailand, Taiwan, Indonesia, India, Saudi Arabia, UAE, Canada and the Philippines.
- c) Achieve Market Access to Vietnam, USA, Japan, South Korea and New Zealand.

Through the hard work of Summerfruit Australia Ltd over the past 15 years and the ability to manage a consistent and complimentary set of Market Access projects the Australian Stonefruit Industry has made some exceptional gains.

Since achieving access to China for Stonefruit in 2016/17 season exports have grown most dramatically.

In the 2018/19 season the Australian Stonefruit industry exported 23,013 tonnes of nectarines, peaches, plums and apricots worth \$88.95 million, achieving a unit value of A\$3.87. This was a new record result for volume, value and unit value.

On the back of this strong 2018/19 export market came a number of new and important activities between the Australian Stonefruit Industry and counterparts in China. This laid the foundation for the industry to continue to manage exports to China throughout the COVID pandemic, difficult air and sea freight logistics and a difficult political climate.

Exports of Stonefruit, for 2019/20 were 21,269 tonnes worth A\$89.10m. While the result was 7.7 per cent lower than 2018/19 the unit values were 9 per cent higher and this has meant the overall value increased by 0.2 per cent.

Project SF19000 sought to utilise the unique relationship that the Australian Stonefruit industry had with China and other trading partners to maintain the momentum of the past two years by undertaking the maintenance of the market in China; expansion of markets in other priority markets, achieving new market access to priority countries, opening opportunities for new entrants into exporting and expanding the product range including organic fruit and production using new and emerging technologies.

Most importantly through the regular meetings with the Department of Agriculture, Fisheries and Forestry they indicated that they would work with and support Summerfruit Australia Ltd in implementing the Industry's Export Strategy, developed as a result of successful China protocols, of in market industry engagement with retailers, growers, importers and others in support of market access negotiations to generate support and "pull through" within the country where market access is being sought. This was essential to the success of SF19000.

Summerfruit Australia Ltd has used the past experiences to maintain and expand on the robust pathway for the Australian Stonefruit industry to export a range of fruit products to China and other overseas countries.

The model used to open up the Chinese market has been utilised to build on current markets as well as being used to effectively 'open the doors' to a number of new markets.

As well the project continued to offer leadership for the Australian Stonefruit industry's export initiatives in all prioritised markets as defined.

Finally, the project worked closely with a raft of allied industry projects to be operated by a professional service unit that engaged with government, national and state agencies, Hort Innovation and growers on matters directly relevant to export on an across-industry basis.

The broad goals of the project are to

- a) Growth in exports to Priority Markets through the maintenance and further development of robust and effective supply chains, exports of Australian Stonefruit through to 2030.
- b) Growth of exports to other markets: Continuation of the 10% per annum growth in the exports of Australian Stonefruit through expansion of market penetration by current and new entrants and the broadening of the product base with new and advanced varieties and organic fruit.
- c) Expansion of export Markets through rigorous and sustained activities establish sound scientifically and commercially viable protocols for new markets including Vietnam, South Korea, Japan, USA and New Zealand.
- d) Growth in new exports Markets through the development of robust and effective supply chains, exports of Australian Stonefruit through to 2030.

Other details of the project activities included the following areas: -

- Development of specific country 'Action Plans'
- Export Readiness and Capacity Building
- Trade Development and Market Access
- Taste Australia International Trade Program / in-market Relationships
- Market Intelligence / Customer Market Insights
- Collaborative Partnerships
- Risk Management
- Communication

## Methodology

The project saw Summerfruit Australia Limited (SAL) lead an operationally-focused market development project aimed at engaging with supply chain members (growers, exporters, importers, retailers) on matters directly relevant to the successful export of Australian Stonefruit to the priority markets.

While, in broad terms the objective of SF19000 is to *'further focus the Australian Stonefruit industry into a range of current and new countries including but are not limited to; China, Singapore, Malaysia, Hong Kong, Indonesia, Thailand, Canada, UAE, India, Philippines, NZ, Vietnam, USA'* Summerfruit Australia Ltd is proposing the following more definitive priorities: -

- a) Maintenance and further development of the Chinese market.
- b) Maintenance and major expansion of the markets in Thailand, Taiwan, Indonesia, India, Saudi Arabia, UAE, Canada and the Philippines.
- c) Achieve Market Access to Vietnam, USA, Japan, South Korea and New Zealand.

Summerfruit Australia Ltd, while detailing the proposed activities of the Work Plan, was conscious that the current market volatility made some components very difficult, and as a result the overall project retained a high level of flexibility to deal with a rapidly changing environment. The COVID-19 pandemic created difficulties in overseas travel in 2020, 2021 and into 2022.

Summerfruit Australia Ltd, dealt with the travel situation, by establishing and maintaining resources in some of the priority countries to be our 'arms and legs'. Market Intelligence programs were established in India (for one year), China, Indonesia and Vietnam.

Further to this Summerfruit Australia Ltd was aware of the volatility of relationships between Australia and some of our trading partners and that this could lead to either restrictions in trade or closure of the market altogether. As a result, Summerfruit Australia Ltd worked closely with growers and exporters to ensure that all trade and protocol requirements were being managed to minimise and/or eliminate any issues that might create trade barriers for the Australian Stonefruit Industry.

The full methodology of SF19000 was detailed below within the agreed contract. But the overarching components were: -

- a) Specific activities as they relate to each of the priority countries.
- b) Relevant project requirements were the fundamental working components that assisted in achieving the components of a).

In relation to a) the following were the major components: -

- a) Maintenance and further development of the Chinese market.
- b) Maintenance and major expansion of the markets in Thailand, Taiwan, Indonesia, India, Saudi Arabia, UAE, Canada and the Philippines.
- c) Market Access to Vietnam, USA, Japan, South Korea and New Zealand.

Most importantly through the regular meetings with the Department of Agriculture, Fisheries and Forestry they indicated that they would work with and support Summerfruit Australia Ltd in: -

- Implementing the Industry's Export Strategy, developed as a result of successful China protocols.
- Market industry engagement with retailers, growers, importers and others in support of market access negotiations.
- Generating support and "pull through" within the countries where market access is being sought.

### **OPERATIONAL COMPONENTS OF THE PROJECT PLAN:**

The following are the major operational components utilised as the project methodology: -

1. Export Readiness and Capacity Building
  - Maintain & update industry export tools as necessary



- Facilitating industry awareness of export opportunities and requirements through associated activities allowing continuity of export knowledge within the industry.
- Provide a point of expert industry advice.
- Deliver information on current export pathway options in conjunction with pre-season workshops.
- Deliver pre-season export readiness workshops, pre-season protocol packhouse/grower registration and auditing facilitation if required in line with identified priorities in an industry export plan.
- Organisation of pre-clearance inspectors as required by industry expectations.
- Supply chain efficiency activities i.e.: cold chain management, quality testing etc.
- Collation and distribution of current information via an on-line export manual platform (export best practice) including but not limited to:
  - Standard operating procedures
  - Country specific requirements
  - Pest & disease monitoring
  - Picking & packing process
  - Quality Standards (including maturity guidelines) and food safety
  - Export MRL information
- Establish Export Reference Group in conjunction with HIA
- Export Ready - Professional and Technical support.

2. Trade Development and Market Access.

- Market Intelligence / Customer Market Insights

3. Market Intelligence - Professional and Technical support.

- a) Fresh intelligence:
- b) ALTIOS Australia
- c) MORIFRESH:

4. Taste Australia International Trade Program.

5. Collaborative Partnerships.

6. Risk Management

- Manage trade-related emergency responses.
- Deliver a risk register & management plan.
- 

7. Communication.

8. Workplan Development / Project management.

## Results and discussion

The Final Reports details the following overall results achieved across the like of the project: -

### TRADE DEVELOPMENT MANAGER:

While there were initial delays in appointing the Summerfruit Trade Development Manager Olivia Tait was engaged from 19<sup>th</sup> July 2021 to 30<sup>th</sup> May 2022. At that time Ms Tait decided to take a position with another horticultural industry.

Charlotte Brunt was engaged as the Trade Development Manager from 10<sup>th</sup> October 2022 to 30<sup>th</sup> May 2024. Ms Brunt is well established in the position and will continue in the role subject to a new project being implemented and Summerfruit Australia Ltd is selected as the service provider.

Where there were gaps in the engagement of the Trade Development Manager Trevor Ranford, as Project Leader fulfilled the role to ensure the project maintained the momentum and achieved the required outputs.

### EXPORT VOLUMES:

Project SF19000 covered the seasons from 2020/21 to 2023/24. During that period the industry faced a number of major issues including the on-set of the worldwide COVID-19 pandemic and devastating weather condition in the 2022/23 season. As a result of these 'events' exports declined in volume and total value, but the unit price continued to reach high levels. 2023/24 saw exports rebound and while not back to the record of 2018/19 in volume the value of sales reached a record level and the unit price was stable in comparison with 2022/23.

The past four export seasons are detailed below with the following values and results: -

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While the volume levels declined across the 2021/22 and 2022/23 seasons there was still robustness within the export supply chain to maintain exports and in some instances grow the markets. The fact that in 2023/24 exports rebounded strongly (43% up) highlights the robust and resilient nature of the Australian Stonefruit Industry.

#### Summerfruit exports by market (2023/24)

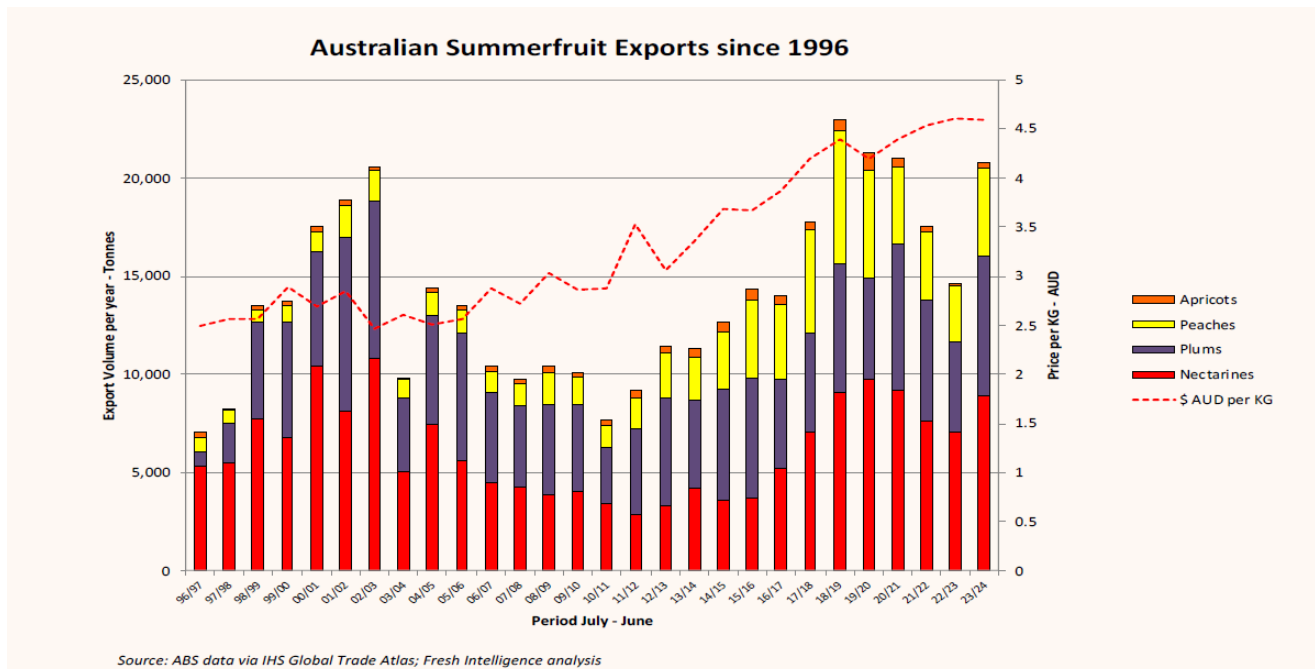
- China was the leading destination with 59 per cent share recording 12,284 tonnes, 40 per cent higher than last season and worth \$56.10m.
- Singapore followed 33 per cent higher to 2,401 tonnes.
- Hong Kong was 6 per cent higher to 1,248 tonnes.
- Canada increased 74 per cent to 609 tonnes.
- The UAE recovered 132 per cent to 942 tonnes.
- New access to Vietnam secured in 2022 lifted 13 per cent to 137 tonnes.

#### Other features of the 2023/24 season were: -

- Nectarines accounted for 43 per cent of summerfruit exports by volume, peaches were 22 per cent, plums 34 per cent and apricots were just 1 per cent by volume.
- Victoria was the largest export state sending out 17,099 tonnes accounting for 82.3 per cent share of exports and increased 49 per cent. New South Wales held a 14.7 per cent share and also increased by 49 per cent to 3,048 tonnes. These two states combined accounted for 97 per cent of the exported volume.
- Summerfruit exports have decreased by an average of 0.8 per cent per year over 5 years though recovered 42 per cent year-on-year in 2023/24. Thus the 2023/24 saw a return to a more "normal" season
- Summerfruit imports by Asian markets from all sources increased 8 per cent in 2023 and has increased an average 11 per cent per year over 10 years. China is the major import market followed by Vietnam.
- Chile is Australia's main competitor in Asia. Australia accounted for 10 per cent share of Southern Hemisphere supplier's summerfruit trade into Asia.

**LONG TERM EXPORT TREND:**

The 2023/24 result saw a return to a more “normal” season consistent with the 2019 – 2021 period.



**OPENING OF EXPORTS TO VIETNAM:**

Summerfruit Australia Ltd, through the engagement with and assistance of the Department of Agriculture, Fisheries and Forestry (DAFF) achieve market access for Australian peaches and nectarines to Vietnam in February 2022.

Components to the process included: -

- Negotiations to achieve an agreed protocol.
- Finalisation of an agreed ‘systems approach’ for two insect pests
- Virtual inspection of orchards, packhouses and the Irradiation facility, using an online platform between Australia and Vietnam (due to the inability to travel resulting from COVID) were undertaken during the period 17<sup>th</sup> – 21<sup>st</sup> January 2022.
- Dose mapping of the irradiation treatment of peaches and nectarines and the supplying of that data to the authorities in Vietnam.
- Signoff of the protocol by the two governments – Australia and Vietnam.
- Five (5) trial shipments totaling 52 tonnes were undertaken in March/April 2022
- Two full seasons of trade – 2022/23 and 2023/24.
- Verification visit by three (3) Inspectors from Vietnam and the inspection of orchards, packing facilities and the irradiation facility. The Project Team members along with DAFF representatives hosted the visiting delegation in late February/early March 2024.
- During the verification visit in February/March 2024 discussions relating to the plum protocol occurred and the Inspectors had the opportunity to see the full process of dose mapping for plums at the Steritech Irradiation facility and the view inspection and approval by an Authorised Officer (AO) at a freight forwarding company.

The following are the details of peach and nectarine exports to Vietnam: -

Export Year	2021/22	2022/23	2023/24
Volumes (tonnes)	52	121	137

Further to that, negotiations for plums to Vietnam progressed during the latter period of the project and the industry is hopefully of achieving access in the second half of 2024.

## EXPORTS TO OTHER COUNTRIES:

The following tables details the exports to the major countries for the 2022/23 and 2023/24 seasons.

SUMMERFRUIT Exports by Market										
Country	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)				Average price per KG	
	July to Jun-23	July to Jun-24	Change to LY	Share %	July to Jun-23	July to Jun-24	Change to LY	Share %	July to Jun-23	July to Jun-24
China	8,804	12,284	40%	59.1%	39.18	56.10	43%	58.9%	4.45	4.57
Singapore	1,807	2,401	33%	11.6%	7.21	9.27	29%	9.7%	3.99	3.86
Hong Kong	1,149	1,248	9%	6.0%	5.45	6.06	11%	6.4%	4.74	4.85
Malaysia	546	1,053	93%	5.1%	3.31	5.05	52%	5.3%	6.07	4.79
Canada	349	609	74%	2.9%	2.90	4.38	51%	4.6%	8.31	7.19
United Arab Emirates	405	942	132%	4.5%	1.53	3.86	152%	4.0%	3.77	4.10
Indonesia	315	521	65%	2.5%	1.68	1.59	-5%	1.7%	5.31	3.04
Vietnam	121	137	13%	0.7%	0.83	1.52	84%	1.6%	6.85	11.10
Saudi Arabia	106	365	243%	1.8%	0.30	1.35	351%	1.4%	2.82	3.71
Kuwait	171	204	19%	1.0%	0.95	1.14	20%	1.2%	5.55	5.61
Qatar	216	240	11%	1.2%	1.13	0.98	-13%	1.0%	5.21	4.07
Taiwan	135	204	52%	1.0%	0.54	0.86	58%	0.9%	4.02	4.18
Philippines	85	106	26%	0.5%	0.73	0.65	-11%	0.7%		6.14
New Caledonia	113	124	9%	0.6%	0.37	0.55	47%	0.6%	3.29	4.42
Thailand	49	26	-47%	0.1%	0.16	0.48	208%	0.5%		18.66
all other	222	311	40%	1.5%	0.87	1.45	67%	1.5%	3.92	4.66
<b>TOTAL Summerfruit</b>	<b>14,593</b>	<b>20,774</b>	<b>42.4%</b>	<b>100%</b>	<b>67.13</b>	<b>95.28</b>	<b>41.9%</b>	<b>100%</b>	<b>\$4.60</b>	<b>\$4.59</b>

source : ABS via IHS Global Trade Atlas; Fresh Intelligence analysis

## REGISTRATION FOR PROTOCOL COUNTRIES:

The registration process for protocol countries has been successfully undertaken each year through the period of May to September.

The process commenced with industry training and education through a grower meeting roadshow. One of these meetings was recorded and the videos made available for growers, exporters and crop monitors to view and utilise.

The actual registration process occurred between mid-June and mid-July utilising a registration portal established and managed by the Australian Table Grape Association (ATGA) for and on behalf of Summerfruit Australia Ltd (SAL).

Once the lists of registered growers and packhouse were finalised and checked they were supplied to the Department of Agriculture, Fisheries and Forestry who then passed the relevant components to the authorities in the protocol countries including China and Vietnam.

Due to the strained political issues between China and Australia there were a number of years when the updated lists were not recognized by China. This meant that some new growers and orchards could not export to China in certain years.

This issue was finally resolved in 2023.

Over the past 4 years, the number of growers applying to become export accredited properties\* has contracted by 10 businesses. This is likely due to the impact of COVID-19 and geopolitical problems with China in which new entrants could not gain access to China. Fortunately, a new list was published in 2023. The number of export accredited packhouses has also declined since 2020 but is recovering.

The number of export accredited properties stayed the same at 89 businesses, however, the number of hectares grew by 6% from 2563 to 2723 Ha. The number of packhouses also increased from 55 to 58, an increase of 5% (table 1).

	2020	2021	2022	2023	Change LY
Growers	99	96	89	89	0%
Packhouses	61	59	55	58	5%
Hectares	2908	2702	2563	2723	6%

Table 1: summary export registration stats (based on applied SF number)

#### **BUSINESS TO BUSINESS EVENTS:**

Members of the Project Team assisted with and/or participated in the following activities across the like of the project: -

- Virtual participation in Gulf Foods and Saudi Event with the assistance of Austrade
- Trade Mission to Vietnam of 16 Summerfruit growers, packers and/or exporters in September 2022.
- Attendance at Food and Hotel Vietnam 2022 held in Ho Chi Minh City during early December 2022. An Australian Summerfruit stand was set up and the Trade Development Manager attended and coordinated the stand and activities.
- Attendance at Asia Fruit Logistic held in Hong Kong during September 2023. An Australian Summerfruit stand was set up and the Trade Development Manager attended and coordinated the stand and activities with assistance from staff from the Vietnam AusHub.
- Prepared and participated in a B2B event in Shanghai, China on the 20<sup>th</sup> of December 2023. The Trade Development Manager (Charlotte Brunt) attended and represented SAL at the meetings.
- Project Leader visited Vietnam and held meetings with supply chain businesses, retailers, e-commerce organisations and DFAT/DAFF/Austrade representatives during the period 17<sup>th</sup> to 22<sup>nd</sup> December 2023.
- Trade Development Manager and the Project leader, along with two industry representatives visited India and participated in meetings with supplier chain companies, retailers and other relevant stakeholders including representatives from DAFF/DFAT/Austrade. In addition, the Australian Stonefruit industry was part of the Australian Pavilion at AAHAR Exhibition and Trade Fair held from the 7<sup>th</sup> to 10<sup>th</sup> March 2024.

#### **EXPORT MARKET ACCESS – BUSINESS CASE:**

The Business Case documents for market access to Japan and South Korea were updated in February 2023 and submitted to both Hort Innovation and DAFF.

The industry continues to work with DAFF to get these prioritized within the DAFF Market Access Program.

#### **COMMUNICATIONS:**

The activities of the project were presented to growers, packers, exporters, crop monitors and other stakeholders through a range of methods including: -

- Fortnightly e-newsletter titled 'Export Matters'.
- Monthly e-newsletter titled 'The Drupe'.
- Three regional Information sessions leading into the annual registration process (one event was recorded and the videos made available by direct links or via the website).
- Market Insights Webinar – China, Indonesia, India (October 2021).
- Vietnam Insights Webinar (19<sup>th</sup> October 2023).
- Power point presentations from industry events/R&D showcases in May 2021, July 2022 and May 2023.

#### **MARKET INTELLIGENCE:**

An integral part of the project was to gather market intelligence in both broad terms as well as focusing on specific countries. Throughout the life of the project there has been the preparation and presentation on specific markets including: -

- India.
- Indonesia.

- Vietnam.
- Thailand.

During the 2023/24 period weekly reports have been received from DAFF for each of the products – apricots, peaches, plums and nectarines – along with an overview of the Stonefruit category.

These reports have been utilised by Fresh Intelligence Consulting to prepare weekly, monthly and end of season reports.

In addition, weekly, monthly and end of season reports have been received in relation to counties including: -

- India (ALTIOS Australia)
- Vietnam (Asian Agribusiness Consulting)
- Indonesia (Morefresh)
- China – Shanghai and Jiangnan Markets (Sino Access Pty Ltd)

Fresh Intelligence also prepared monthly reports on the trade out of Chile.

These along with other market intelligence has been distributed to growers, packing houses, exporters and crop monitors via e-mail blasts.

Additional market intelligence has, at times, been gathered through the network of Agricultural Counsellors, Austrade representatives, Global Victoria, SHAFTE and Hort Innovation.

#### **STAKEHOLDER MATERIAL:**

As part of the project there has been a requirement to produce new material and/or regularly update past material to be used for stakeholder engagement, training and education.

The following materials that have been produced included: -

- Registration Training manual
- Protocol and work plan documents.
- Crop Monitoring Training
- Stonefruit IPM Manual.
- MRL listings for relevant countries.
- Stonefruit Export Manual.
- Summerfruit Recipe Booklet.
- Storage and Quality Guidelines.
- Export Trade Postcard.
- Summerfruit Retailer Guide.
- Summerfruit Industry Introductory e-brochure
- Sea and Air Freight Reports (during COVID).

In summary while the COVID Pandemic created issues and restricted trade and the rainfall during harvest in 2022 and 2023/24 caused crop damage the Australian Summerfruit Industry was able to maintain exports and particularly in 2023/24 see a return to over 20,000 tonnes of stonefruit exported.

The opening of the market to Vietnam in 2022 for peaches and nectarines was a major achievement and industry is anticipating the protocol for plums to Vietnam to be signed off in the second half of 2024.

SF19000 has resulted in the establishment of a Trade and Market Access position – Trade Development Manager – and with support from other Summerfruit Australia Ltd ‘staff’ the Project Team has been able to collect data and information, prepare relevant materials and generally support the export development over the past three and a half years.

The Australian Summerfruit industry is poised to make new export growth of the foundation set by the outputs and outcomes of SF19000.

## Outputs

Table A. Output summary

Output	Description	Detail
Engagement of a Trade Development Manager.	Engagement of a Trade Development Manager to undertake the relevant components of the project.	<p>Olivia Tait was engaged as the Trade Development Manager from 19<sup>th</sup> July 2021 to 30<sup>th</sup> May 2022.</p> <p>Charlotte Brunt was engaged as the Trade Development Manager from 10<sup>th</sup> October 2022 to 30<sup>th</sup> May 2024.</p> <p>Where there were gaps in the engagement of the Trade Development Manager Trevor Ranford, as Project Leader fulfilled the role to ensure the project maintained the momentum and achieved the required outputs.</p>
Refinement and/or development of individual country 'Action Plan'.	Refinement and/or development of individual country 'Action Plan' utilising the activities detailed above to drive the particular activities of the Project and the Project Team.	<p>The individual country requirements were regularly visited and amended depending on the circumstances. The COVID pandemic curtailed some of the physical activities, so the Project Team was reliant on utilising relevant partners in different countries.</p> <p>Austrade assist in a number of areas including: -</p> <ul style="list-style-type: none"> <li>• Development of the Australian Summerfruit shine video and documents.</li> <li>• Virtual attendance at Gulfoods, Dubai and the Saudi Expo in February 2022.</li> <li>• Participation in a Vietnam Regional Roadshow event in Vietnam in September 2023.</li> <li>• Attendance at and participation in the Australian Pavilion at the AAHAR Exhibition in March 2024.</li> </ul> <p>The Project Team utilised:</p> <ul style="list-style-type: none"> <li>• ALTIOS Australia in preparing a detailed report on India and then supplying Market Intelligence Reports during 2021/22.</li> <li>• Morefresh in preparing a detailed report on the Indonesian market and then preparing weekly/monthly market intelligence reports across the like of the project.</li> <li>• Sino Access Pty Ltd to prepare weekly and end of season reports on the markets in China during the 2022/23 and 2023/24 seasons.</li> <li>• Asian Agribusiness Consulting in preparing detailed reports on the market in Vietnam and then prepare weekly and end of season reports on the markets in Vietnam during the 2022/23 and 2023/24 seasons.</li> <li>• Asian Agribusiness Consulting in preparing detailed reports on the market in Thailand.</li> </ul> <p>The Project Team worked with Global Victoria and held two events utilising Vic House in Shanghai, China including: -</p> <ul style="list-style-type: none"> <li>• Launch of a new Plum program called Topa™ aimed at increasing the exports of the main plum variety – Majestic Pearl.</li> </ul>

		<ul style="list-style-type: none"> <li>• A Business-to Business event in December 2023.</li> </ul> <p>In Vietnam, Summerfruit Australia Ltd, received support from the Australian Chamber of Commerce in Vietnam (AusCham) with the engagement of a full-time person as the Summerfruit Industry Representative. Major activities were undertaken across the period 2023/24 including: -</p> <ul style="list-style-type: none"> <li>• Attendance at Food and Hotel Vietnam in HCMC in December 2022.</li> <li>• Support visits in December 2023 to be a part of the season launches in HCMC and Hanoi.</li> </ul> <p>A summary report on the work undertaken by the Summerfruit Industry Representative is attached to this Milestone Report as <b>Appendix A</b>.</p> <p>All reports from these service providers were supplied to the relevant stakeholders at appropriate times during the project. In addition, the major country reports and samples of the weekly reports were attached to the relevant Milestone Reports.</p>
Grower meetings and/or training sessions for the export registration process.	The Project Team facilitated grower meetings and/or training sessions for the export registration process, each year across the major growing regions.	<p>An annual roadshow was undertaken leading into the 2021/22, 2022/23 and 2023/24 export registration periods.</p> <p>The 2024/25 roadshow was undertaken across the period 27<sup>th</sup> to 29<sup>th</sup> May 2024 with meetings in Swan Hill, Cobram and Shepparton. A total of 70 growers, exporters and crop monitors attended across the three meetings.</p> <p>The following presentations were given at those meetings: -</p> <ul style="list-style-type: none"> <li>• Season in review.</li> <li>• Export market updates and registration requirements.</li> <li>• Registration process and changes,</li> <li>• MRL app &amp; testing.</li> <li>• Website updates.</li> <li>• Crop monitoring app</li> </ul> <p>The meeting at Shepparton was recorded and the videos will be made available for ALL growers, exporters and crop monitors to review.</p> <p>The 2024/25 registration process will open on the 17<sup>th</sup> of June 2024.</p>
Weekly and Monthly export reports.	Prepare and distribute weekly and monthly export reports from November to May each season and a Final report in July each year.	<p>Wayne Prowse from Fresh Intelligence prepared and submitted weekly, monthly and end of year reports across the four seasons covered by this project.</p> <p>These reports were e-mailed to the growers, exporters and allied support businesses on a regular basis.</p> <p>‘Export updates – April 2024’ is an example of the monthly reports and is attached to this Final Report as <b>Appendix B</b>.</p>



		<p>'Australian Summerfruit Exports - Weekly to 28 April 2024' is an example of the weekly reports and is attached to this Final Report as <b>Appendix C</b>.</p> <p>A copy of the '2023/24 Export Trade Statistics Report is attached to this Final Report as <b>Appendix D</b>.</p>
Stakeholder surveys.	The Project undertook stakeholder surveys	<p>The Stakeholder surveys were undertaken during the life of the project and the results were presented as part of the relevant Milestone Reports.</p> <p>The most recent surveys are detailed in the Monitoring and Evaluation section of this Final Report.</p> <p>Having analysed the data Summerfruit Australia Ltd has presented appropriate summaries to the industry stakeholders, grower levy payers, packers, State Agencies and the Department of Agriculture, Fisheries and Forestry.</p>
Updates industry MRLs.	The Project Team has regularly revised and provided updates to industry on MRL's and changes for each market pre-season and/or during the season if circumstances change.	<p>The Summerfruit MRL spreadsheet has been made available to all growers/exporters/crop monitors on a regular basis through direct e-mails.</p> <p>In addition, the spreadsheets have been uploaded to the Summerfruit Australia Ltd website – <a href="http://www.summerfruit.com.au">www.summerfruit.com.au</a></p> <p>Through a complimentary project funded by Agriculture Victoria the Project Team has been able to develop and make available the Summerfruit MRL and WHP App.</p> <p>The most recent MRL and WHP spreadsheet is attached to this Final Report as <b>Appendix E</b>.</p>
Grower and exporter registration process for the protocol.	The Project Team has undertaken the grower and exporter registration process for the protocol markets of China, Taiwan and Thailand and submit to the Department of Agriculture, Fisheries and Forestry (DAFF) within the timeframes of the Industry Advice Notice.	<p>As detailed above the Project Team have undertaken annual roadshows to inform growers, exporters and crop monitors about the formal registration process.</p> <p>For each year the registration process commenced in mid-June and closed in mid-July. The Trade Development Manager has then reviewed the applications, modified where required and then submitted to DAFF.</p> <p>On finalization, the relevant lists have been supplied to the authorities in each of the protocol countries.</p> <p>Details of the registration statistics from 2020 to 2023 are attached to this Final Report as <b>Appendix F</b>.</p> <p>The Industry Advice Notice (IAN) for the 2024/25 season was released on Monday 17<sup>th</sup> June 2024.</p> <p><a href="#">2024-35: Horticulture Exports – Application for the export of Summerfruit to protocol markets</a></p>
Training materials for growers, packers and exporters.	The Project Team maintained, reviewed and where necessary prepared relevant documents and/or	<p>All of the training materials have been regularly updated and made available to the stakeholders either through e-mail blasts of placement on the Summerfruit Australia website <a href="http://www.summerfruit.com.au">www.summerfruit.com.au</a></p> <p>Copies of the training materials have been tabled with</p>

	<p>training materials for growers, packers and exporters before each season.</p> <ul style="list-style-type: none"> <li>○</li> </ul>	<p>relevant the Milestone Reports and covered the following documents: -</p> <ul style="list-style-type: none"> <li>○ Registration Training manual</li> <li>○ Protocol and work plan documents.</li> <li>○ Crop Monitoring Training</li> <li>○ Stonefruit IPM Manual.</li> <li>○ MRL listings for relevant countries.</li> <li>○ Stonefruit Export Manual.</li> </ul>
Business cases documents for new and improved market access.	The Project Team reviewed and resubmitted the Business Case documents for Japan and Korea and submitted to Hort Innovation and DAFF.	<p>The revised Business Case studies for market access to Japan and South Korea were prepared and submitted in February 2023.</p> <p>Copies of the two reports are attached to this Final Report as <b>Appendices G and H.</b></p>
Market research, engagement, intelligence collection and activity reports to industry.	The Project Team has engaged representative companies in China, Vietnam, Indonesia and India (priority Markets) to conduct market research and engagement and collect and prepare a mix of weekly, monthly and end of season reports. These reports are forwarded to the Trade Development Manager who then distributes them through an e-mail blast to in excess of 300 growers, exporters and/or crop monitors on the industry list.	<p>Copies of the different reports as received from the relevant companies have been supplied as part of each Milestone Reports.</p> <p>The following are samples of the Final Reports from the 2023/24 season: -</p> <ul style="list-style-type: none"> <li>• '2023/24 Export Trade Statistics Report is attached to this Final Report as <b>Appendix D.</b></li> <li>• 'Stonefruit Report – Beijing and Guangzhou, 21 December 2023' attached to this Final Report as <b>Appendix I.</b></li> <li>• 'Vietnam Market Intelligence Report Peaches and Nectarines 2023/24 Season' attached to this Final Report as <b>Appendix J.</b></li> <li>• 'Indonesian imports of Apricots, Peaches, Plums and Nectarines for the period November 2023 to February 2024' attached to this Final Report as <b>Appendix K.</b></li> <li>• 'SUMMERFRUIT PROGRAM IN VIETNAM - FINAL REPORT' attached to this Final report as <b>Appendix L.</b></li> </ul>
Post-season and Pre-season reports.	The Trade Development Manger prepared and delivered both post- and pre-season reports.	<p>Initially the annual 'Export Trade Statistics Report' is prepared at the conclusion of each season. This is then followed by the 'Summerfruit Global Market Trade Analysis Report'. Both reports are distributed to all growers and exporters.</p> <p><b><i>The 2023/24 Summerfruit Global Market Trade Analysis report will not be available until later in 2024 and will be tabled as part of Project SF23003.</i></b></p> <p>Other pre-season reports were prepared and presented as part of the annual registration roadshows.</p>
Monitoring of issues.	The Trade Development Manager has throughout	<p>Some of the issues that have been dealt with include: -</p> <ul style="list-style-type: none"> <li>• Illegal use of Australian grower block numbers and</li> </ul>

	<p>the life of the project monitored issues during the respective season and incorporated the results and learnings from conducted surveys into the relevant reports and supplied to agencies like DAFF.</p>	<p>registration numbers.</p> <ul style="list-style-type: none"> <li>• MRL breach in Apricots to the EU.</li> <li>• MRL breaches of fruit exported to Taiwan.</li> <li>• Naming of varieties of plums into China.</li> <li>• Fruit quality issues in Vietnam.</li> </ul> <p>Each of these issues have either been raised by DAFF or SAL has raised them with DAFF. In each case appropriate information has been prepared and circulated to DAFF and/or industry in general and/or the relevant grower or exporter if that information is known.</p>
Contact point for export issue.	<p>The Trade Development Manager has been the contact point for export issues, prioritisation of the issues and preparation of the appropriate reports.</p>	<p>Some of the issues that have been dealt with include: -</p> <ul style="list-style-type: none"> <li>• Illegal use of Australian grower block numbers and registration numbers.</li> <li>• MRL breach in Apricots to the EU.</li> <li>• MRL breaches of fruit exported to Taiwan.</li> <li>• Naming of varieties of plums into China.</li> <li>• Fruit quality issues in Vietnam.</li> </ul> <p>Each of these issues have either been raised by DAFF or SAL has raised them with DAFF. In each case appropriate information has been prepared and circulated to DAFF and/or industry in general and/or the relevant grower or exporter if that information is known.</p>
Audits and pre-clearance programmes,	<p>The Project Team continued to maintain a role, as much as is allowable, with the coordination of audits and pre-clearance programmes by overseas authorities.</p>	<p>The Trade Development Manager continued to be the point of contact for growers, exporters, crop monitors and other stakeholders and has assisted individual companies with managing the registration process for protocol companies.</p> <p>In addition, the Trade Development Manager has been the conduit between individual companies and relevant sections within DAFF to assist with audit matters and pre-clearance issues.</p>
Supply chain efficiencies.	<p>The Project Team has engaged with the researchers and transfer the information and technology to the growers and exporters in relation to Supply chain efficiencies.</p>	<p>Thought the life of the project the Project Team has worked with a number of research and development organisations including: -</p> <ul style="list-style-type: none"> <li>• Agriculture Victoria,</li> <li>• Queensland DAF</li> <li>• RMIT</li> <li>• CRC for Food Agility</li> </ul> <p>In the following projects: -</p> <ul style="list-style-type: none"> <li>• Deploying real-time sensors to meet Summerfruit export requirements.</li> <li>• Smarter and more responsive supply chains: Orchard to market summerfruit traceability and sea freight management.</li> <li>• Serviced Supply Chains II. Ongoing)</li> </ul> <p>Reports from these projects have been presented to the industry stakeholders through webinars and/or face-to-face meetings in May 2021, July 2022 and May 2023.</p>

Data sets.	<p>The Project Team continued to have input into the maintenance and development of appropriate data sets that are necessary to meet the relevant international market’s phytosanitary data requirements are available; participate in any related phytosanitary project technical working groups.</p>	<p>The failure of past research in establishing methyl bromide treatments of plums has recently come to the fore. This resulted in the treatment being removed for some domestic movement of plums.</p> <p>The situation may lead to some potential changes in some trading protocols with particular reference to China and India. Summerfruit Australia Ltd is willing to look at additional research in developing relevant data sets for this method of the treatment.</p> <p>The Project Team members have been communicating with the FASTA Project with the aim of receiving documentation on the data gaps. A Summerfruit Roundtable is being planned for June/July. The developments will be reported as part of the new Project – SF23003.</p> <p>With the opening of trade to Vietnam new treatments and data sets for irradiation were required. The Project Team members worked with industry members, Steritech and DAFF in developing the relevant treatments and data sets. The work undertaken was accepted by Vietnam through five trial shipments in March/Apil 2022.</p> <p>During a visit by Inspectors from Vietnam (February/March 2024) the treatment of and the finalization of data sets for Plums was undertaken by Steritech. It is believed that these will be incorporated into the Plum protocol that is currently being negotiated.</p>
‘Systems Approach’	<p>Through a PASE project Summerfruit Australia Ltd was able to prepare information on a ‘Systems Approach’ for use on a number of insects.</p> <p>This information was supplied to DAFF and the details of the ‘Systems Approach’ methodology was included in the Peach and Nectarine protocol for Vietnam.</p>	<p>A copy of the Peach and Nectarine protocol for the export to Vietnam is attached to this Final Report as <b>Appendix M</b>.</p> <p>Details of the ‘Systems Approach’ methodology is detailed in section 2 b) on pages 1 and 2 of the protocol.</p>
Export customer attitudes and perceptions.	<p>The Project Team monitored and communicated export customer attitudes and perceptions within the priority countries.</p>	<p>The Market Intelligence reports from India, Indonesia, China and Vietnam regularly detailed information from sectors within the Supply chain networks.</p> <p>The reports received were regularly distributed to the stakeholders for them to read and take on the points raised.</p> <p>Examples of the reports include: -</p> <ul style="list-style-type: none"> <li>• ‘Stonefruit Report – Beijing and Guangzhou, 21 December 2023’ attached to this Final Report as <b>Appendix N</b>.</li> <li>• ‘Vietnam Market Intelligence Report Peaches and Nectarines2023/24 Season’ attached to this Final</li> </ul>

		Report as <b>Appendix O</b> .
Project Reference Group	The Project established and maintained a Project Reference Group	The Project Reference Group met on a regular basis to review the milestone reports including the Work Plan(s) and gave direction when required to modify the activities of the Project.
Australian Stonefruit Industry Export Strategic Plan.	An Australian Stonefruit Industry Export Strategic was in existence at the time of the commencement of Project SF19000 but was due to conclude in 2023.	Project SF22000 commenced in early 2023 and the Final Report titled 'Australian Summerfruit Industry Export Strategy Final Report' was submitted in November 2023.  Members of the Project Team participated in the SF22000 through: <ul style="list-style-type: none"> <li>• Direct consultation with KPMG (service provider).</li> <li>• Supply of relevant documents and past reports.</li> <li>• Supply of industry contacts to participate in industry workshops.</li> <li>• Membership of the Project Reference Group.</li> <li>• Review of the DRAFT and FINAL reports.</li> </ul>
Annual Export Market Development Strategy.	As a subset of the Export Strategic Plan the Project Team with the assistance of Fresh Intelligence Consulting prepared, implemented and reviewed the Annual Export Market Development Strategies.	At the end of each export season a Summerfruit Global Market Trade Analysis was prepared and distributed to all stakeholders.  As the 2023/24 report is still to be submitted the 'SUMMERFRUIT GLOBAL MARKET TRADE ANALYSIS 2022/23' has been attached to the Final Report as <b>Appendix P</b> .  These reports have been complimented by relevant country analyses undertaken for India, Indonesia, Thailand and Vietnam as well as the Australian Summerfruit Industry Export Strategy detailed in the output above.
Emergency industry consultation and response plan.	The Project Team has utilised the relevant components of the project Risk Register, Communications and Engagement plan and the Monitoring and Evaluation Plan to deal with any emergency that may have led to market disruption or closure.	Some of the emergency issues that have been dealt with include: - <ul style="list-style-type: none"> <li>• COVID pandemic.</li> <li>• Restriction in interstate and international travel.</li> <li>• Availability of Sea and Air Freight.</li> <li>• Illegal use of Australian grower block numbers and registration numbers.</li> <li>• MRL breach in Apricots to the EU.</li> <li>• MRL breaches of fruit exported to Taiwan.</li> <li>• Naming of varieties of plums into China.</li> <li>• Fruit quality issues in Vietnam.</li> </ul> Each of these issues have either been raised by DAFF or relevant national and state agencies or SAL has raised them with DAFF/Agencies. In each case appropriate information has been prepared and circulated to DAFF and/or industry in general and/or the relevant grower or exporter if that information is known.
Interactions with Department of Agriculture, Fisheries and Forestry including liaison in relation to	The Project Team has maintained a strong working relationship with the Department of Agriculture, Fisheries and Forestry including liaison	The Project Team have maintained the strong working relationship with DAFF and the communications are often and regular and are well document as part of past Milestone Reports the following are recent activities between the Project Team and DAFF: - <ul style="list-style-type: none"> <li>• National Fruit Fly Management Protocol Meeting – 4<sup>th</sup></li> </ul>

<p>Market Access opportunities.</p>	<p>with the market access section to ensure the market access applications for Japan and South Korea become high priorities for the Department to negotiate.</p> <p>Relevant meetings have been reported on at the appropriate times within the appropriate Milestone Reports.</p>	<p>April 2024</p> <ul style="list-style-type: none"> <li>• Ongoing discussions on market access through the Summerfruit Market Access Working Group and Meeting with Mirianne Jovanoski to discuss agenda items – 15<sup>th</sup> May 2024.</li> <li>• Attendance at ‘Industry discussion with DAFF Agriculture Counsellor Network’ meeting – 14<sup>th</sup> May 2024.</li> <li>• Summerfruit Australia meeting with Beijing Counsellors – 15<sup>th</sup> May 2024.</li> <li>• Meeting with Peter Ikin and other members of the DAFF Hort Export Team to discuss the upcoming industry roadshow and other associated topics – 15<sup>th</sup> May 2024.</li> <li>• Involvement of Peter Ikin and other DAFF representatives as part of the 2024/25 export registration roadshow – 27<sup>th</sup> to 29<sup>th</sup> May 2024.</li> <li>• Communications in relation to the Summerfruit training program for crop monitors.</li> </ul>
<p>Summaries of all project workshops and training.</p>	<p>The Project Team has been active in preparing summaries of all project workshops and training including number of attendees, topic of discussion and feedback from participants.</p>	<p>All activities undertaken during the life of this project have been recorded through the maintenance of the power point presentations and/or recording of the presentations.</p> <p>These presentations have been supplied to the stakeholders through relevant links and/or placed on the website.</p> <p>Of recent times the website has been going through major changes and the placement of substantial materials in relevant areas/topics has commenced to ensure it is easy for stakeholder to navigate.</p>
<p>Horticulture Export Industry Consultative Committee and the Industry Trade Advisory Panel.</p>	<p>A member of the Project Team (Trevor Ranford – then Olivia Tait and now Charlotte Brunt) represented Summerfruit on the Horticulture Export Industry Consultative Committee and the Industry Trade Advisory Panel.</p>	<p>Project Team members have been engaged, through the life of this project, with the Horticulture Export Industry Consultative Committee and have been active in a range of topics.</p> <p>The development of DAFF weekly horticulture commodity exports calendar year reports – Plant Exports Analytics – was an initiative that came from this Committee and has been extremely important in the production of the weekly export reports by Fresh Intelligence Consulting.</p> <p>A copy of the Weekly Export Reports is attached as <b>Appendix B</b>.</p>
<p>Program Logic Plan</p>	<p>A program Logic Plan was prepared and submitted to Hort Innovation.</p>	<p>A copy of the Program Logic Plan was submitted as an Appendix to Milestone Report 102.</p>
<p>Monitoring and Evaluation Plan.</p>	<p>A Monitoring and Evaluation Plan was prepared and submitted to Hort Innovation.</p>	<p>A copy of the Monitoring and Evaluation Plan was submitted as an Appendix to Milestone Report 102.</p>
<p>Risk Register.</p>	<p>A project Risk Register, and how they will be</p>	<p>A copy of the Risk Register was submitted as an Appendix to Milestone Report 102.</p>

	managed was prepared and submitted to Hort Innovation.	
Communications and Engagement Plan.	A stakeholder Communications and Engagement Plan was prepared and submitted to Hort Innovation.	A copy of the Communications and Engagement Plan was submitted as an Appendix to Milestone Report 102.
Project Work Plan, Annual Work Plans and Milestone KPI spreadsheets.	A Project Work Plan was prepared and submitted as part of Milestone 102. Annual Work Plans and Milestone KPI spreadsheets were prepared and submitted with each relevant Milestone Report	A copy of the Milestone KPI spreadsheet (submitted as part of Milestone 106) is attached to this Final Report as <b>Appendix Q</b> .
Milestone Reports.	Milestone Reports 102 to 108 were prepared and submitted to Hort Innovation on the due dates,	The initial proposal was for six (6) Milestone Reports (102 to 107) but a variation was submitted and Milestone 108 was added.  All Milestone Reports were approved and accepted by Hort Innovation.
Final Project Report	A Final Project Report was prepared and submitted to Hort Innovation in June 2024	The Final Report was prepared by Trevor Ranford (Project Leader) and Charlotte Brunt (Trade Development Manager) utilising the Hort Innovation Final Report template and was submitted in June 2024.
Status reports including a summary for distribution to industry.	The Project Team has prepared Status reports in a range of forms that have been distributed to industry using a range of methods.	The following are some of the Status Reports prepared and distributed: - <ul style="list-style-type: none"> <li>• Weekly, fortnightly and/or monthly market intelligence reports.</li> <li>• Country analyses reports including reports on exports from Chile.</li> <li>• Fortnightly 'Export Matters' e-newsletters.</li> </ul> <p>The distribution of these reports has been undertaken using e-mail lists through a MailChimp format.</p> <p>Two major lists are maintained by the Project Team and include:</p> <ul style="list-style-type: none"> <li>• growers, packers, exporters and crop monitors (280 on the list)</li> <li>• broader list that includes government representatives, researchers and overseas contacts (530 on the list).</li> </ul>
Liaise with the Hort Innovation Trade Unit and other relevant staff,	Regular liaison with the Hort Innovation Trade Unit and other relevant	The Project Team of Trevor Ranford and Olivia Tait/Charlotte Brunt held regular meetings with Mimi Doan.

	<p>staff was undertaken during the life of the project.</p>	<p>These meetings were often on a weekly basis particularly between Charlotte Brunt and Mimi Doan.</p> <p>At intervals there were meetings with both Mimi Doan and Mila Bristow to discuss any relevant issues.</p>
<p>Cooperative working relationship with Hort Innovation.</p>	<p>A cooperative working relationship with Hort Innovation was developed through the reset/refocus program.</p>	<p>Through the reset/refocus program between Hort Innovation and Peak Industry Bodies, Summerfruit Australia Ltd was able to review and renew the working relationship resulting in a new Memorandum of Understanding.</p> <p>Throughout the life of Project SF19000 there was a cooperative working relationship between the Project Team and the relevant/appropriate Hort Innovation staff.</p>
<p>Involvement in the Taste Australia International Trade program.</p>	<p>While the COVID-19 pandemic stopped international travel there were limited opportunities to be involved with the Taste Australia International Trade program. Notwithstanding that, the Project Team were involved in a number of events.</p>	<p>The Trade Development Manger Summerfruit Australia Ltd participated in the 2023 Asia Fruit Logistica Trade Exhibition in Hong Kong. 'Australian Summerfruit' was part of the Hort Innovation stand.</p> <p>The Summerfruit Australia Ltd Chair, Dean Morpeth, participate in the 'Taste the Wonders of Australia' events in Indonesia held in May 2024.</p>
<p>Market development package operated by Hort Innovation</p>	<p>Where possible and appropriate the Project Team have had input into a comprehensive market development package operated by Hort Innovation</p>	<p>Through the Project Team Summerfruit Australia Ltd has participated in a range of activities organised and operated by Hort Innovation to build Market Development both for the Australian Stonefruit Industry as well as the broader Australian Horticulture Industry.</p> <p>Activities have included Asia Fruit Logistic, Taste the Wonders of Australia, regular international market webinars and associated events.</p>
<p>Summerfruit Industry representative in Vietnam.</p>	<p>While not part of the original project the opportunity arose whereby Summerfruit Australia Ltd was selected as one of three industries to be part of the AusHub established within the Australian Chamber of Commerce – Vietnam and funded via DFAT.</p>	<p>The establishment of a presence in the AusHub in Ho Chi Minh City through the financial support of the Australian Chamber of Commerce – Vietnam allowed for the employment of Ms Thu Nguyen as the Summerfruit Industry Representative.</p> <p>The wages were paid by AusHub but through this Project the relevant support costs were covered. This process ensured that all the relevant data, information and contacts were retained by the Project.</p> <p>The program was established to promote the export development of Australian summerfruit. AusHub aimed to foster fresh bilateral trade and investment opportunities, aligning with the Australia-Vietnam Enhanced Economic Engagement Strategy (EEES).</p> <p>From April 1, 2023, to April 30, 2024, the Program focused on outreach, engagement, and market research activities to establish a local supply chain, improve cold chain</p>



		<p>management, and expand market opportunities for Australian summer fruit.</p> <p>A report titled 'SUMMERFRUIT PROGRAM IN VIETNAM - FINAL REPORT' presents an overview of the program and is attached to this Final report as <b>Appendix L</b>.</p> <p>This program has been integral in establishing a strong foundation for the growth in exports to Vietnam.</p>
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## Outcomes

Table B. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Industry informed and trained:	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Extension and capability.</p> <p>STRATEGY 1: Deliver communication and extension capability to create positive change in the priority areas for the summerfruit industry that is supportive of maximizing sustainable profitability, driving export opportunities, biosecurity and product integrity.</p> <p>NB: This Outcome/Strategy is then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>IMPACT:</p> <p>A change/progression in awareness, knowledge and attitudes for grower profitability and sustainability which support the adoption of best practice and innovations (e.g., orchard management, fruit quality, export capability)</p> <p>RESULTS:</p> <p>The Australian Stonefruit industry (growers, packers, exporter/marketers) were aware of and able to efficiently and effectively utilise the protocols to further grow exports of Stonefruit to mainland China, Taiwan, Thailand and Vietnam and other export markets of significance.</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Engagement of a Trade Development Manger to be a point of contact for stakeholders.</li> <li>• Grower meetings and/or training sessions for the export registration through annual roadshows in 2021/22, 2022/23 and 2023/24.</li> <li>• Weekly, fortnightly and/or monthly export reports. Examples are attached to this Final Report as <b>Appendices B, C and D.</b></li> <li>• Training materials for stakeholders including: - <ul style="list-style-type: none"> <li>○ Crop Monitoring Training</li> <li>○ Stonefruit IPM Manual</li> <li>○ Stonefruit Export Manual.</li> </ul> </li> <li>• Market Intelligence research, engagement, intelligence collection and activity reports to industry. Examples are attached to this Final Report as <b>Appendices D, I, J, K and L.</b></li> </ul>
Lead industry	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Demand creation.</p> <p>STRATEGY 1: Develop and</p>	<p>IMPACT:</p> <p>Diversified Export markets and increased market</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Engagement of a Trade Development Manger to be a point of contact for</li> </ul>

	<p>implement a national industry export strategy which takes into account regionally specific opportunities for new and improved market access.</p> <p>NB: This Outcome/Strategy is then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>access for Australian Summerfruit.</p> <p>RESULTS: The successful supply chains created through the project demonstrated the need for the delivery of consistent quality, relationships and clear communications within the supply chains to allow growers/packers/exporters, not involved directly in the project, to build similar robust and effective supply chains with importers/retailers within all export countries.</p>	<p>stakeholders.</p> <ul style="list-style-type: none"> <li>• Develop and/or refine industry country 'Action Plans'.</li> <li>• Undertake grower, packing house and exporter registration for protocol countries.</li> <li>• Prepare and submit Business Case documents for new markets and for market maintenance.</li> <li>• Monitor and act on emergency issues.</li> <li>• Work with researchers to develop supply chain efficiencies.</li> <li>• Drive the maintenance and/or development of appropriate data sets for international markets.</li> <li>• Develop a practical 'Systems Approach' for specific export markets.</li> <li>• Develop and implement a new Australian Stonefruit Industry Export Strategic Plan.</li> <li>• Maintain a strong working relationship with the Department of Agriculture, Fisheries and Forestry, Department of Foreign Affairs and Trade, Austrade and State Agencies.</li> <li>• Liaise and work with Hort Innovation in areas of market development and international trade.</li> </ul>
<p><b>Growth in exports to Priority Markets:</b></p>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Demand creation.</p> <p>STRATEGY 2: Maintain and</p>	<p>IMPACT: Increased trade and export volumes and value.</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Undertake Business to Business events in specific countries</li> </ul>

	<p>improve trade through business-to-business engagement activities and in-market representation in mature and emerging trade markets.</p> <p>NB: This Outcome/Strategy is then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>RESULTS: Through the maintenance and further development of robust and effective supply chains, exports of Australian Stonefruit, while declined in 2021/22 and 2022/23, was able to rebound in 2023/24 and is considered still on track to achieve growth through to 2030.</p>	<p>including China, Vietnam and India.</p> <ul style="list-style-type: none"> <li>• Prepare and distribute MRL and WHP data on the markets to minimise MRL breaches.</li> <li>• Prepare and provide training materials for stakeholders both in Australia and the relevant markets.</li> <li>• Undertake market research, engagement, intelligence collection with the priority markets and disseminate to the stakeholders. Examples of these are attached to this Final Report as <b>Appendices D, I, J and L</b>.</li> <li>• Trade Mission of 16 growers to Vietnam in September 2022.</li> <li>• Establishment of a fulltime Summerfruit Industry Representative as part of the AusHub in Vietnam.</li> </ul> <p>As a result, in 2023/24 the following was achieved: -</p> <ul style="list-style-type: none"> <li>• China was the leading destination with 59 per cent share recording 12,284 tonnes, 40 per cent higher than last season and worth \$56.10m.</li> <li>• New access to</li> </ul>
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			Vietnam secured in 2022 lifted 13 per cent to 137 tonnes.
<b>Growth of exports to other markets:</b>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Demand creation.</p> <p>STRATEGY 2: Maintain and improve trade through business-to-business engagement activities and in-market representation in mature and emerging trade markets.</p> <p>NB: This Outcome/Strategy is then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>IMPACT: Increased trade and export volumes.</p> <p>RESULTS: Through the maintenance and further development of robust and effective supply chains, exports of Australian Stonefruit, while declined in 2021/22 and 2022/23, was able to rebound in 2023/24 and is considered still on track to achieve growth through to 2030.</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Undertake Business to Business events in specific countries including UAE and Saudi Arabia.</li> <li>• Prepare and distribute MRL and WHP data on the markets to minimise MRL breaches.</li> <li>• Prepare and provide training materials for stakeholders both in Australia and the relevant markets.</li> <li>• Undertake market research, engagement, intelligence collection with the priority markets and disseminate to the stakeholders. An Example of the report is attached to this Final Report as <b>Appendix K</b></li> <li>• Prepare a market report on Thailand.</li> </ul> <p>As a result: -</p> <ul style="list-style-type: none"> <li>• The number of export accredited properties stayed the same at 89 businesses, however, the number of hectares grew by 6% from 2563 to 2723 hectares. The number of packhouses also increased from 55 to 58, an increase of 5%.</li> <li>• Singapore was 33 per cent higher to 2,401 tonnes.</li> <li>• Hong Kong was 6 per cent higher to 1,248 tonnes.</li> <li>• Canada increased 74 per cent to 609</li> </ul>

			<p>tonnes.</p> <ul style="list-style-type: none"> <li>The UAE recovered 132 per cent to 942 tonnes.</li> </ul>
<p><b>Expansion and Growth in new Export Markets:</b></p>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 3: Business insights.</p> <p>STRATEGY 2: Use trade data to guide ongoing export development opportunities</p> <p>NB: This Outcome/Strategy is then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>IMPACT: Increased knowledge and scientific/research capacity.</p> <p>RESULTS: Through rigorous and sustained activities, the project was able to establish sound scientifically and commercially viable protocols for the new market of Vietnam (Peaches and Nectarines) during 2022.</p> <p>NB: These is an expectation that a protocol for Plums to Vietnam will be approved in the second half of 2024.</p> <p>RESULTS: Through the development of robust and effective supply chains, exports of Australian Stonefruit are on track to increase through to 2030.</p>	<p>The only new export market that opened up during the like of this project was Peaches and Necatines to Vietnam. Through the Project the Team was heavily involved in working with DAFF and the Vietnamese authorities in having the protocol finalised and implemented. Some of the activities included: -</p> <ul style="list-style-type: none"> <li>Finalisation of an agreed ‘Systems Approach’.</li> <li>Assisting with a ‘Virtual Inspection’ of orchards, packing facilities, freight forwarders and the Irradiation facility that was conducted in early January 2022.</li> <li>Hosting a verification visit by Vietnamese Inspectors in late February/early March 2024.</li> </ul> <p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>Development of a document detailing the structure of the market and supply chain in Vietnam.</li> <li>Presenting Webinars on Vietnam.</li> <li>Obtaining weekly and monthly market intelligence and export reports from Vietnam and disseminating them to stakeholders.</li> <li>Interaction with DAFF,</li> </ul>

			<p>Austrade and the Agricultural Counsellors.</p> <ul style="list-style-type: none"> <li>• Business to Business events and other trade events in Vietnam in December 2022, September 2023 and December 2023.</li> <li>• Trade Mission of 16 growers to Vietnam in September 2022.</li> <li>• Establishment of a fulltime Summerfruit Industry Representative as part of the AusHub in Vietnam.</li> </ul> <p>The results of this work were the following: -</p> <ul style="list-style-type: none"> <li>• Agreement of the Peach and Nectarine protocol in February 2022.</li> <li>• Five (5) trial shipments delivered in March/April 2022.</li> <li>• Two full seasons of trade – 2022/23 - 121 tonnes and 2023/24 – 137 tonnes.</li> </ul>
<p><b>Positioning Australian Stonefruit:</b></p>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Demand Creation.</p> <p>STRATEGY 3: Increase domestic consumer demand and build international consumer awareness for Australian summerfruit through improving knowledge, attitudes and purchase intent.</p> <p>NB: This Outcome/Strategy is then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>IMPACT: Increased consumer demand for Australian summerfruit.</p> <p>RESULTS: Through well designed and presented programs, including but not confined to the Hort Innovation International Trade program, achieve the consistent positioning Australian Stonefruit as the premium counter seasonal quality fruit compared to other international suppliers.</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Undertaking Project SF19000 and achieving the results detailed within this Final Report.</li> <li>• Undertake grower meetings and/or training sessions to improve export opportunities.</li> <li>• Undertaking Business to Business events and other trade events in the Middle East, China, Hong Kong, Vietnam and India.</li> <li>• Establishment of a fulltime Summerfruit Industry</li> </ul>

			<p>Representative as part of the AusHub in Vietnam.</p> <ul style="list-style-type: none"> <li>• Interaction with the Department of Agriculture, Fisheries and Forestry including liaison in relation to Market Access opportunities.</li> <li>• Preparation and delivery of the Australian Stonefruit Industry Export Strategy.</li> <li>• Liaison with the Hort Innovation Trade Unit, the Taste Australia Trade program and other relevant staff.</li> </ul>
<b>Grower return:</b>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Demand creation.</p> <p>STRATEGY 2: Maintain and improve trade through business-to-business engagement activities and in-market representation in mature and emerging trade markets.</p> <p>OUTCOME 2: Industry supply, productivity and sustainability.</p> <p>STRATEGY 1: Improve industry preparedness and resilience to biosecurity threats and support a national approach to fruit fly management, including improving access to existing and new markets.</p> <p>NB: These Outcomes/Strategies are then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>IMPACT:</p> <p>Increased trade and export volumes and value.</p> <p>IMPACT: Reduced impacts of endemic fruit flies, improving productivity, reducing costs and supporting market access.</p> <p>RESULTS:</p> <p>Through the correct positioning Australian Stonefruit Export have continued to grow in volume translating into increased grower returns.</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Development and maintenance of “Action Plans’ for specific countries.</li> <li>• Weekly, fortnightly and/or monthly export reports covering volumes and prices.</li> <li>• Market research, engagement, intelligence collection and activity reports to industry. Examples are attached to this Final Report as <b>Appendices D, I, J, K and L.</b></li> <li>• Monitoring and reacting to export and market issues.</li> <li>• Audits and pre-clearance program.</li> <li>• Establishing and maintaining data sets that ensure the most practical and efficient protocols.</li> <li>• Development of a ‘Systems Approach’ to ensure a seamless methodology within the Vietnam protocol.</li> </ul>



			<ul style="list-style-type: none"> <li>• Collect and disseminate export customer attitudes and perceptions to assist growers better understand the individual markets. Examples of the reports are attached to this Final Report as <b>Appendices N and O.</b></li> <li>• Prepare and disseminate annual Export reports detailing unit value prices across numerous countries. An example of that is attached to this Final Report as <b>Appendix D.</b></li> </ul>
<p><b>Linkages:</b></p>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 1: Demand creation.</p> <p>STRATEGY 2: Maintain and improve trade through business-to-business engagement activities and in-market representation in mature and emerging trade markets.</p> <p>OUTCOME 4: Extension and capability.</p> <p>STRATEGY 3: Provide the opportunity for engagement within the summerfruit industry with other industries and stakeholders to innovate through trusted relationships.</p> <p>NB: These Outcomes/Strategies are then complimented by the</p>	<p>IMPACT: Increased trade and export volume and value.</p> <p>IMPACT: Improved networks and cross-industry collaboration increase efficiencies and use of R&amp;D outputs and build a stronger, more resilient industry.</p> <p>RESULTS: Through ongoing communications and engagement the Australian Stonefruit industry has continued to further expand and/or develop strong linkages with international trading</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Grower meetings and/or training sessions.</li> <li>• Maintaining the engagement of a Summerfruit Trade Development Manger to be the contact point for export/market issues.</li> <li>• Interaction with the Department of Agriculture, Fisheries and Forestry including liaison in relation to Market Access opportunities.</li> <li>• Participation on the Horticulture Export Industry Consultative Committee and the Industry Trade Advisory Panel.</li> <li>• Liaison with the Hort Innovation Trade Unit, the Taste Australia Trade program and other relevant staff.</li> <li>• Cooperative working relationship with Hort</li> </ul>

	area within the Summerfruit SIP Monitoring and Evaluation Framework.	partners, relevant State and Federal Agencies and the Australian Government.	<p>Innovation.</p> <ul style="list-style-type: none"> <li>• Business to Business events and other trade events in the Middle East, China, Hong Kong, Vietnam and India.</li> <li>• Establishment of a fulltime Summerfruit Industry Representative as part of the AusHub in Vietnam.</li> </ul>
<b>Risks:</b>	<p>SUMMERFRUIT INDUSTRY STRATEGIES:</p> <p>OUTCOME 2: Industry supply, productivity and sustainability.</p> <p>STRATEGY 3: Support and co-ordinate crop protection regulatory activities with the potential to impact plant protection product access, both in Australia and internationally.</p> <p>OUTCOME 3: Business insights</p> <p>STRATEGY 1: Use industry production benchmarking activity to measure and track individual and industry productivity and profitability.</p> <p>NB: These Outcomes/Strategies are then complimented by the area within the Summerfruit SIP Monitoring and Evaluation Framework.</p>	<p>IMPACT:</p> <p>Regulatory Risk Assessments have informed proactive strategic priority setting to avoid pest management gaps in the event access or use is negatively impacted</p> <p>IMPACT:</p> <ul style="list-style-type: none"> <li>• Improved data on cost of production across enterprises of different scale</li> <li>• Opportunities identified for cost reduction</li> </ul> <p>RESULTS:</p> <p>Utilising current and new programs the Australian Stonefruit Industry effectively managed all export risks and emergencies in a timely manner.</p>	<p>The following Outputs supported this Outcome: -</p> <ul style="list-style-type: none"> <li>• Maintenance of a Project Reference Group to review the project and maintain its relevance.</li> <li>• Establishment of a Risk Register and reporting on any risks as part of each Milestone Report.</li> <li>• Undertake emergency industry consultation and response activities to particular emergencies including: - <ul style="list-style-type: none"> <li>○ Restrictions in air and sea freight during COVID.</li> <li>○ MRL breaches.</li> <li>○ Fruit Quality.</li> </ul> </li> <li>• Preparation and deliver of export market intelligence and reports to assist stakeholders to better understand the markets and adjust their activities. Examples are attached to this Final Report as <b>Appendices D, I, J, K and L.</b></li> </ul>

## Monitoring and evaluation

Table C. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
< Refer to the M&E Plan >	< Identify aspects of project performance that address the Key Evaluation Questions >	< List opportunities for improvement and future development >
Develop a project Monitoring and Evaluation Plan and implement that across the life of the project.	<p>The Project Team prepared and submitted a Monitoring and Evaluation Plan as part of Milestone 102.</p> <p>The Plan was accepted by Hort Innovation.</p> <p>The Plan was utilised throughout the life of the project to undertake specific surveys and assessments, particularly after major events. Where appropriate the results were submitted as part of the appropriate Milestone Report(s) and the most recent assessments undertaken are detailed below.</p>	<p>Summerfruit Australia Ltd has been conscious that communications to stakeholders – grower, packing facilities, exporters, crop monitors, agronomists and others within the supply chain can always be improved. With that in mind a Communications and Engagement Project was developed and has been commissioned.</p> <p>The engagement of both an Industry Development Manager and a Communications Manager will be valuable in further improving and expanding both the Monitoring/Evaluation and Communications/Engagement for both the new Trade and Market Access Project.</p>
Monitoring and evaluation reporting will be undertaken through the project’s milestones and where appropriate provide a “pre-season” report and a “post-season” report of project activities.	<p>The Monitoring and Evaluation Plan was utilised throughout the life of the project to undertake specific surveys and assessments, particularly after major events.</p> <p>Where appropriate the results were submitted as part of the appropriate Milestone Report(s) and the most recent assessments undertaken are detailed as follows: -</p> <ul style="list-style-type: none"> <li>• 2024 SAL Export Project Satisfaction Survey A copy of the Survey report is attached to this Final Report as <b>Appendix R.</b></li> <li>• Summary of viewing of Export Matters (Vol 38, 19-Mar-24) A copy of the Export Matters report is attached to this Final Report as <b>Appendix S.</b></li> <li>• SAL website performance 1</li> </ul>	<p>The results were used to modify aspects such as data collection and reporting, the six-monthly work plan(s) and appropriate program activities.</p> <p>Some relevant comments from the 20924 SAL Export Satisfaction Survey are as follows: -</p> <ul style="list-style-type: none"> <li>• All scores in 2024 were 3.7 or above, indicating that all activities were rated as being satisfactory (4 +/- 2.5) or higher. The highest scores related to <ul style="list-style-type: none"> <li>(i) <i>“Communication and support from Trevor and Charlotte”</i> and <i>“in-market reports from China”</i> (4.4),</li> <li>(ii) <i>“MRL app”</i> and <i>“export stats from Australia”</i> (4.3).</li> <li>(iii) <i>“Support from SALs’ representative in</i></li> </ul> </li> </ul>

	<p>June 2023 to 1 June 2024. A copy of the SAL website performance report is attached to this Final Report as <b>Appendix T.</b></p> <ul style="list-style-type: none"> <li>• Summary Report on the viewing of The Drupe - Summerfruit news. A copy of a Summary Report on the viewing of The Drupe e-newsletter is attached to this Final Report as <b>Appendix U.</b></li> </ul>	<p><i>Vietnam (Thu Nguyen)</i>, “<i>export registration help desk</i>” and the “<i>Vietnam in-market report</i>” also scored highly at 4.2”.</p> <ul style="list-style-type: none"> <li>• I feel that SAL should look at making at least 1 trip per year to other states in the form of a roadshow to keep Stonefruit growers engaged with SAL.</li> <li>• Table grapes use a weekly pie graph format to communicate export sales and regions, I find this method quick and easy absorb.</li> <li>• The session last night (roadshow) was very repetitive compared to other years. There are not really any growers/packhouses new to summerfruit export requirements, so going through all of this is a bit of a waste. Maybe make the session smaller and just focus on new information.</li> </ul> <p>These and the many other positive and negative reports will be utilised in developing the Work Plan for future Projects and Programs.</p>
<p>Monitoring and evaluation will also be through regular reports of the Stonefruit Trade Development Manager.</p>	<p>This objective was to give all stakeholders a timely and accurate picture of how the project is proceeding and will allow industry leaders to direct the activities of the project to a particular area if such action is required. Stakeholders will be able to feed their concern back to the Project Management Committee for action.</p> <p>Where appropriate the M&amp;E results were submitted to the Project Team and the PRG so that adjustments could be made.</p> <p>The most recent assessments undertaken are detailed as follows: -</p> <ul style="list-style-type: none"> <li>• 2024 SAL Export Project Satisfaction Survey A copy of the Survey report is attached to this Final Report as <b>Appendix R.</b></li> <li>• Summary of viewing of Export</li> </ul>	<p>Regular meeting of both the Project Team and the Project Reference Group reviewed the relevant documents and appropriate adjustments were made to the project to ensure it met all stakeholders expectations.</p>

	<p>Matters (Vol 38, 19-Mar-24) A copy of the Export Matters report is attached to this Final Report as <b>Appendix S.</b></p> <ul style="list-style-type: none"> <li>• SAL website performance 1 June 2023 to 1 June 2024. A copy of the SAL website performance report is attached to this Final Report as <b>Appendix T.</b></li> <li>• Summary Report on the viewing of The Drupe - Summerfruit news. A copy of a Summary Report on the viewing of The Drupe e-newsletter is attached to this Final Report as <b>Appendix U.</b></li> </ul>	
<p>The annual “Season Review” reports will summarise the relevant market information.</p>	<p>This will be the basis of the Project Management Committee planning the following year’s operations (at their winter meeting each year). The points above are also relevant to this Key Evaluation Question.</p> <p>The main ‘Season Review’ documents are the annual Export Trade Report and the Summerfruit Global Market Trade Analysis Report.</p> <p>A copy of the ‘2023/24 Export Trade Statistics Report is attached to this Final Report as <b>Appendix D.</b></p>	<p>Adjustments to the export market activities were made at the appropriate times during the project.</p>

## Recommendations

The following are some recommendations from Summerfruit Australia Ltd as the service provider: -

1. That the development and expansion of exports of Australian Summerfruit continue through the implementation of a further Market Access and Trade Development Project.
2. That Industry continues to promote and provide export opportunities as essential and profitable components of production and market expansion and an incentive to improve supply chain efficiencies.
3. Continue to encourage Australian exporters to trade directly with all markets and work within the parameters of the relevant export protocol.
4. Continue to improve knowledge and cooperation among growers/exporters to improve and expand the export culture and trust within the industry and associated supply chains and groups.
5. The Summerfruit Industry representative in Vietnam be engaged for at least a further year.

## **Refereed scientific publications.**

There were no refereed scientific publications prepared as part of Project SF19000.

## References

There are no specific References to be added to this Report.



## Intellectual property

The project generated Intellectual Property in the form of the confidential market data collected for each supply chain in the relevant reports. However, this data rapidly aged and became largely irrelevant by the end of the season. A caveat may be applied by individual participants and will be notified to Hort Innovation and SIAP.

The "Season Review" report placed the more general information generated from the in-season reports in the public domain thus destroying any likely commercialisable IP.

## Acknowledgements

The overall development of the Australian Summerfruit export program has been as a result of the efforts and inputs of the SF19000 Project Leader(s), the project team, the Australian growers and exporters. This has been complimented and supplemented by the working relationships with the Department of Agriculture, Fisheries and Forestry (DAFF), Hort Innovation and our trading partners in each of the 45 countries.

While this is an outcome for the whole industry, this project, SF19000, its many predecessors, SAL, the Project Manager (SAL CEO, Trevor Ranford) and the Trade Development Mangers Charlotte Brunt and previously Olivia Tait played a significant role in achieving the outcomes.