

What happened in the Table Grape Fund last year?

Annual Report 2021/22



About Hort Innovation and the Table Grape Fund

Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australia's horticulture sector. We work closely with industry to invest the table grape R&D and marketing levies, together with Australian Government contributions, into key initiatives for growers, through the Table Grape Fund. We're proud of the work we do to help drive productivity, profitability, and demand for table grape growers and the horticulture sector.

Read on for an overview of what Hort Innovation delivered in the Table Grape Fund during the year.

We also encourage you to download a copy of the overarching Hort Innovation Annual Report 2021/22 at www.horticulture.com.au/annual-report-portal to see how Hort Innovation worked to benefit the horticulture sector during the year.

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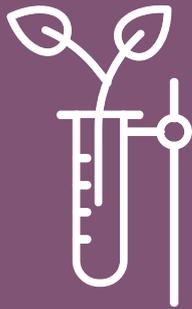
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Table Grape Fund snapshot 2021/22



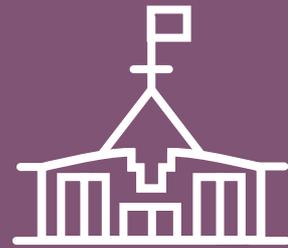
\$2.01M

invested in R&D



\$1.14M

invested in marketing



\$1.5M

in levies collected

by the Government and passed on to Hort Innovation for investment

Industry facts



4.2%

The production value of the Australian table grape industry grew at an average annual rate of 4.2 per cent over the five years to 2020/21



\$461M

While COVID has impacted the volume of exports, the value of table grape exports has more than doubled in value in recent years, growing from \$180 million in 2012/13 to \$461 million in 2020/21



71%

The majority of Australia's table grapes are grown in Victoria (71 per cent), with smaller amounts grown in New South Wales, Queensland, South Australia, Western Australia and the Northern Territory

These facts and more can be found in the Australian Horticulture Statistics Handbook, which is delivered by Hort Innovation each year. The handbook is packed with horticulture statistical information and analysis for some 75 categories. See www.horticulture.com.au/horticulture-statistics-handbook.

Consumer insights



7.4 million

7.4 million Australian households purchased table grapes in 2021/22



9.2

On average, Australians bought table grapes 9.2 times in 2021/22

These insights were made available through the Harvest to Home platform (www.harvesttohome.net.au) delivered as part of an investment providing regular consumer behaviour data and insight reporting.

Just some of the things delivered for you during the year



Access to consumer insights through multi-industry investments

to understand consumer behaviours, attitudes and purchase intentions – see www.horticulture.com.au/table-grape



The industry communications program, delivering *The Vine* magazine, *Pick of the bunch* newsletters, events and the industry website www.australiangrapes.com.au



An industry extension program to support the adoption of industry best practice and new technologies for table grape growers – see hortinn.com/tg19000



Efforts to help table grape growers adopt the new minimum maturity standards through working closely with growers, wholesalers and supermarkets – read more at hortinn.com/tg19004



Maintaining and improving market access for the table grape industry through a trade development program – see hortinn.com/tg20000



The table grape Harvest to Home dashboard providing regular household purchase data and insight reporting at www.harvesttohome.net.au



Domestic and international marketing campaigns – read more on [p11](#)



Investments in the Hort Frontiers strategic partnership initiative to address longer-term and often complex issues and opportunities critical to the future of Australian horticulture – see www.horticulture.com.au/hort-frontiers*

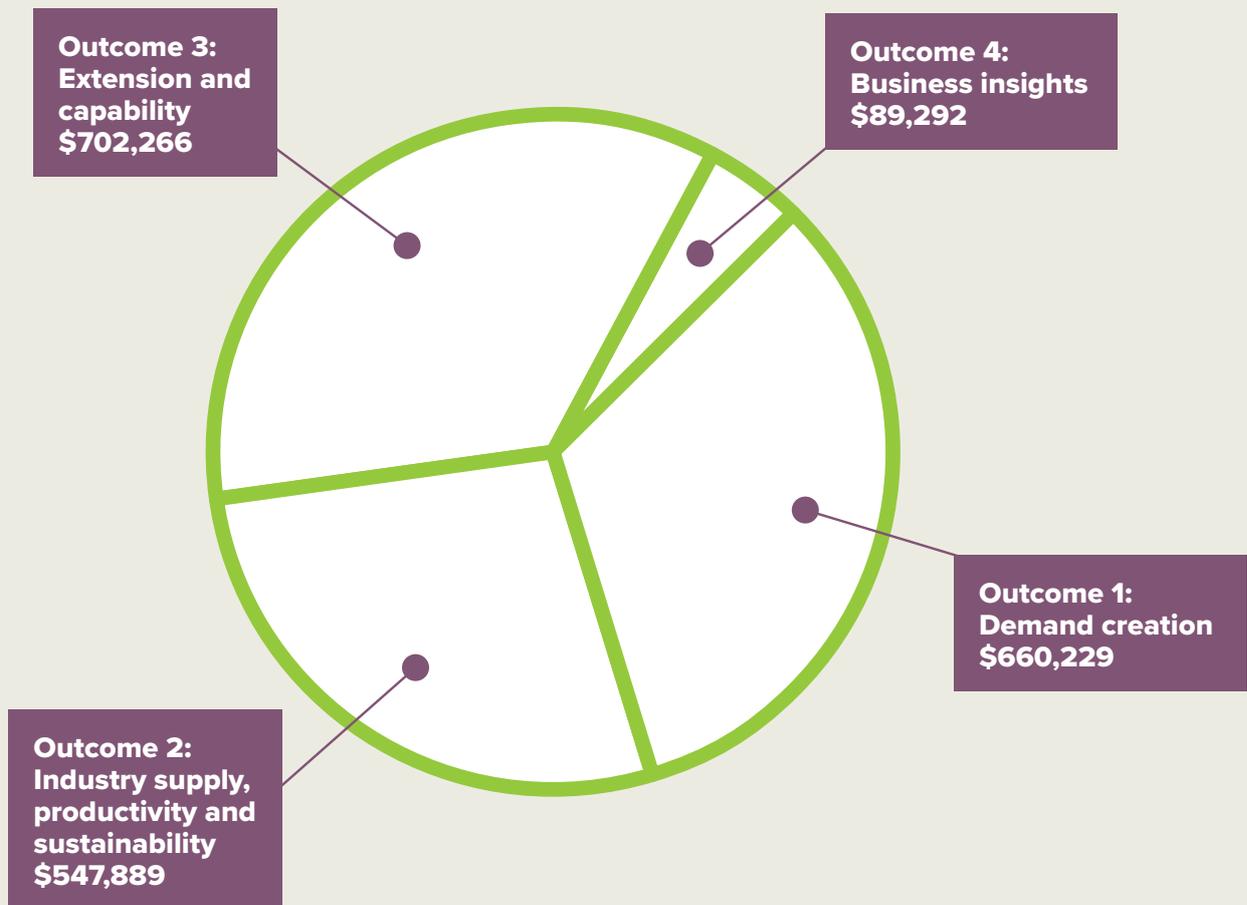


Projects supported by grants secured by Hort Innovation, ranging from cross-sector Rural R&D for Profit initiatives to horticulture-specific work to aid in access to crop protection products – see the Hort Innovation Annual Report 2021/22 for more details*

You can visit www.horticulture.com.au/table-grape at any time to access information on new, ongoing and completed projects, and to download resources produced by your levy investments.

*These initiatives were delivered outside of the Hort Innovation Table Grape Fund and, in most instances, did not involve the industry levy

Here's how your R&D levy was invested over the year



The table grape Strategic Investment Plan (SIP) guides investments specific to the Hort Innovation Table Grape Fund. The SIP features priority outcome areas identified and agreed upon by the industry. Hort Innovation works to invest in R&D and marketing initiatives aligned to these.

The above chart shows how project expenditure in the Table Grape Fund during 2021/22 was aligned to the SIP. We have allocated each project to a SIP outcome based on its primary objective.

Which projects were in each of the SIP outcome areas?

Outcome 1: Demand creation

Demand creation supports the Australian table grape industry to develop existing and future domestic and international markets.

Marketing activities during 2021/22 also contributed towards the demand creation outcome. You can read more about this year's table grape marketing campaign on [p11](#).

Project title and code	2021/22 investment	Status	More information
Developing a national systems approach for meeting biosecurity requirements to access key Asian markets (AM17001)	\$32,000	Completed	hortinn.com/am17001
Essential market access data packages (MT14052)	\$177,480	Ongoing	hortinn.com/mt14052
Australian horticulture international demand creation (ST21007)	\$2,438	Ongoing	hortinn.com/st21007
Table grape consumer acceptance and attitudes (TG19003)	\$24,457	Ongoing	hortinn.com/tg19003
Table grapes market access and trade development (TG20000)	\$423,854	Ongoing	hortinn.com/tg20000



Outcome 2: Industry supply, productivity and sustainability

The Australian table grape industry has increased production efficiency, sustainability and profitability through innovative R&D, robust biosecurity systems and consistent high-quality fruit.

Project title and code	2021/22 investment	Status	More information
SITplus: Port Augusta Qfly SIT factory pilot operation (FF18003)	\$69,464	Ongoing	hortinn.com/ff18003
National Fruit Fly Council Phase 4 (FF20000)	\$16,000	Ongoing	hortinn.com/ff20000
Plant Biosecurity Research Initiative – Phase 2 (HA19007)	\$1,423	Ongoing	
Improving preparedness of the Australian horticultural sector to the threat potentially posed by Xylella fastidiosa (a severe biosecurity risk) (MT17006)	\$17,936	Ongoing	hortinn.com/mt17006
Improving plant industry access to new genetics through faster and more accurate diagnostics using next generation sequencing (MT18005)	\$30,000	Ongoing	hortinn.com/mt18005
Parasitoids for the management of fruit flies in Australia (MT19003)	\$30,000	Completed	hortinn.com/mt19003
Regulatory support and coordination (pesticides) (MT20007)	\$4,944	Ongoing	hortinn.com/mt20007
Strategic Agrichemical Review Process (SARP) – Updates (MT21005)	\$5,250	Ongoing	hortinn.com/mt21005
Table grape industry minor use program (TG16000)	\$350	Ongoing	hortinn.com/tg16000
Review of the biosecurity plan and manual for the viticulture industry (TG18000)	\$1,700	Ongoing	hortinn.com/tg18000
Trapping efficacy in table grape vineyards for area wide management of Queensland fruit fly (TG19001)	\$60,000	Completed	hortinn.com/tg19001
Minimum maturity standards adoption across the table grape supply chain (TG19004)	\$310,821	Ongoing	hortinn.com/tg19004

Outcome 3: Extension and capability

Improved capability and an innovative culture in the Australian table grape industry maximises investments in productivity and demand.

Project title and code	2021/22 investment	Status	More information
Australian table grape industry communications program (TG18004)	\$232,124	Ongoing	hortinn.com/tg18004
Extension of technologies and best management practices to the Australian table grape industry (TG19000)	\$470,142	Ongoing	hortinn.com/tg19000

Outcome 4: Business insights

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

Project title and code	2021/22 investment	Status	More information
Consumer behavioural and retail data for fresh produce (MT17015)	\$12,642	Completed	hortinn.com/mt17015-tablegrape
Horticulture trade data (MT19005)	\$6,026	Ongoing	hortinn.com/mt19005
Consumer demand spaces for horticulture (MT21003)	\$5,539	Ongoing	hortinn.com/mt21003
Consumer behavioural data program (MT21004)	\$9,803	Ongoing	hortinn.com/mt21004
Seasonal horticulture labour accommodation study (MT21007)	\$1,942	Ongoing	
Economic contribution of Australian horticulture (MT21010)	\$5,950	Ongoing	hortinn.com/mt21010
Creative campaign evaluation (MT21012)	\$35,008	Ongoing	
Pilot program: Consumer usage, attitude and brand tracking (MT21201)	\$9,759	Completed	hortinn.com/mt21201
Consumer usage and attitude tracking 2022/23 (MT21202)	\$2,625	Ongoing	hortinn.com/mt21202

Financial operating statement

Table Grape Fund Financial operating statement 2021/22

	R&D (\$)	Marketing (\$)	Total (\$)
	2021/22 July – June	2021/22 July – June	2021/22 July – June
OPENING BALANCE	878,603	3,394,587	4,273,190
Levies from growers	752,013	752,012	1,504,025
Australian Government money	1,165,832	–	1,165,832
Other income*	1,580	115,578	117,157
TOTAL INCOME	1,919,424	867,590	2,787,014
Project funding	2,012,938	1,140,263	3,153,201
Consultation with and advice from growers	1,620	799	2,419
Service delivery	317,106	215,085	532,191
TOTAL EXPENDITURE	2,331,663	1,356,148	3,687,811
CLOSING BALANCE	429,745	2,869,410	3,299,156
Levy collection costs	36,619	36,619	73,237

* Interest, royalties

Levy collection costs – These are the costs associated with the collection of levies from industry charged by Levy Revenue Services (LRS)

Service delivery – Also known as Corporate Cost Recovery (CCR), this is the total cost of managing the investment portfolio charged by Hort Innovation

Making sure that levy investment decisions align with industry priorities

What will be the Table Grape Fund's focus over the next five years?



Hort Innovation developed the table grape Strategic Investment Plan (SIP) in 2021 to reflect current priorities for the table grape industry, involving extensive consultation with table grape growers and industry stakeholders, including the Australian Table Grape Association. The SIP is the roadmap that helps guide Hort Innovation's oversight and management of individual levy industry investment programs.

The table grape SIP lays the foundation for decision-making in levy investments and represents the balanced interests of the table grape industry. The most important function of the SIP is to make sure that levy investment decisions align with industry priorities.

The table grape SIP identifies four outcome areas that will contribute to the productivity and profitability of the sector. They are:

- Industry supply, productivity and sustainability
- Demand creation
- Extension and capability
- Business insights.

What projects will the Fund be investing in next year?

The table grape Annual Investment Plan (AIP) 2022/23 details how Hort Innovation spends levy funds over 12 months. The table grape industry SIP guides investment decisions, and our consultation process prioritises investments based on potential impact and levy fund availability.

Hort Innovation publishes Annual Investment Plans each year over the lifespan of the SIP and advises industry stakeholders via various communication channels.

Hort Innovation will continue to report on fund performance regularly, focusing on outcomes and the impact of investments.



Visit www.horticulture.com.au/table-grape-fund-management to view both documents and better understand how Hort Innovation invests your levy.

Improving grower capability through the delivery of extension services

The table grape industry are investing in an extension program to ensure growers have access to the information they need to grow their businesses

The investment *Extension of technologies and best management practices to the Australian table grape industry (TG19000)* is ensuring that Australian table grape growers are kept informed about current R&D activities, results and resources – supporting the adoption of industry best practice and bolstering table grape production in key growing areas across the country.

Delivered by the Australian Table Grape Association, this investment supports the employment of an industry development manager and industry development officer for the table grape industry. These roles are responsible for delivering industry development and extension services in a nationally coordinated, but regionally delivered manner. Their activities will focus on extending the reach of the table grape R&D program across industry and improving grower capability to adopt best management practices and new on-farm innovations.

Meet Molly Black, Elders Horticultural Agronomist at Robinvale Victoria

Molly Black works as a horticultural agronomist for Elders in Robinvale Victoria where she is involved with the table grape, avocado, citrus, potato, and vegetable industries.



Molly Black, Agronomist, Robinvale, Victoria.

What are table grape growers looking to achieve?

All growers in the Robinvale-Euston region are looking to achieve the best quality table grapes as possible. They all take pride in supplying the best produce. It doesn't matter if they are sending it to the Sydney markets or exporting their product to China – there is a passion to be 'top of the market'.

I really enjoy working with table grape growers to achieve this. I recently visited the Brisbane and Sydney markets, and while looking at the produce, I felt like a kid in a candy store. I was so proud of the effort our growers put into their product and receiving glowing feedback from the marketers.



How has this been supported through the extension program?

The ATGA industry development and extension team – Karen, Jenny and Alison – are a great resource for the table grape industry. Growers and agronomists can contact them to get information on timely industry issues such as restricted spring growth (RSG), which occurred in the Sunraysia region over the past two seasons. The virus and other testing and surveys, along with the information sessions, is helping to address the problem and extend current knowledge to growers.

The ATGA team have other valuable skills and experiences – I have contacted Alison regarding maximum residue limits (MRLs), and Karen and Jenny for biosecurity and general viticulture expertise.

What changes have growers made?

Obviously there's no silver bullet, but the extension program has facilitated honest discussions between table grape growers about how to tackle challenges and opportunities and is contributing to a more collaborative industry in respect to issues such as RSG, as well as extending knowledge about technology best practices.

The recent tech demo days had a great turnout with demonstrations of driverless tractors and recycling sprayers. There was heaps of discussion, with many growers making further enquiries.

It is so valuable to have a dedicated team in the ATGA out in the field and listening to grower challenges and opportunities. Without the project and the team's hard work and dedication to the industry, the RSG focus groups via Teams which bring agronomist and growers together, would never have happened.

“

The recent tech demo days had a great turnout with demonstrations of driverless tractors and recycling sprayers. There was heaps of discussion, with many growers making further enquiries.”

Molly Black,
Agronomist, Robinvale, Victoria

Growing demand for Aussie grapes at home and abroad

Hort Innovation is responsible for investing the table grape marketing levy into a range of activities to drive awareness and consideration. Here's a quick look at some of the activities and achievements in 2021/22.

In 2021/22, the Taste Australia consumer marketing program for Australian Table Grapes ran from early April to the end of June in eight markets, including Japan, South Korea, China, Vietnam, Thailand, Indonesia, Malaysia, and the Philippines.

The campaign was successfully managed across the different markets, with the primary objective to build awareness and preference for the premium commodity while driving sales in stores. However, due to COVID-19 restrictions and supply chain disruptions, the campaign did face several delays in the execution of the different activities, both offline and online.

The program was designed with a full suite of marketing activities, including:

- Season launch event across several markets
- A retail program inclusive of sales-driven activities, such as in-store displays, display competition, gift-with-purchase and samplings
- Online promotions to reach a wider audience and boost sales via e-commerce platforms or retailers' websites.

Here is a snapshot of how the Australian Tables Grapes campaign was launched in different markets:

Japan

The Taste Australia campaign started with a season launch event hosted in an Australian restaurant in Tokyo, with the presence of local trade partners, importers and representatives from Austrade and the Australian Embassy. This event was followed by a retail program across multiple retail stores with an extensive array of activities, such as in-store displays, samplings, recommendation sales and promotional deals.

South Korea

This year's campaign focused on in-store display and sampling activities. Three major retailers (E-Mart, Lotte Mart and HomePlus) participated in the retail program to enhance the brand awareness of Taste Australia's program and boost sales.



Continued

Marketing spotlight



China

Due to the sudden outbreak of the COVID-19 pandemic in Shanghai and Guangzhou from March to early June 2022, the decision was made to cancel both in-person events at the wholesale markets and hold an online event as a safe alternative. The online event allowed industry media and trade partners nationwide to gather in a virtual space. This event was a success, with 70 attendees thanks to the collaboration with the Victorian Government.

Vietnam

To capitalise on the success of previous Taste Australia campaigns in Vietnam, a range of offline and online activities were conducted from April to June 2022 to promote Australian Table Grapes and boost sales. The scope of work was split across an online launch event, a retail program with sales-driven activities, support to importers and a media event in collaboration with Austrade, who co-funded the program in Vietnam.

Thailand

The campaign focused on the retail program and the support of local trade partners. A total of nine retail chains participated in the program through various activities such as in-store displays, samplings, display competition, gift-with-purchase, and online promotions. While it was not part of the initial plan, Australian Table Grapes received further promotion amongst the general public through the participation in the Australian Fine Foods Fair with Austrade and the opening ceremony of a new Big C store in Pattaya.

Indonesia

A media launch event at a major retailer was the initial introduction of the campaign to both trade partners and industry media, with the participation of Austrade representatives. This initiative was followed by a retail program across four of the biggest retail chains, accompanied by the deployment of point-of-sale materials, retail promotions and push-selling activities by trained staff members.

Malaysia

The Taste Australia “Embrace Grapeness” campaign was launched to create awareness about Australian grapes’ wide variety and premium nature while communicating their taste, health benefits and seasonality. A multi-layered approach was undertaken through the organisation of a virtual media event, which highlighted the arrival of the produce to market. This was supported through the delivery of a comprehensive retail program that included in-store displays, display competition, gift-with-purchase, and sampling activities.

The Philippines

An all-inclusive program was conducted in the Philippines through several activities, such as the organisation of a season launch event at the Hilton hotel in Manila, the distribution of point of sale materials across five retail partners, sampling activities and other sales-related promotions. The promotion of Australian Table Grapes was also extended online through retailers’ websites and social media channels.

Try this

Grab a premium, quality snack by the bunch
Now in season



Try this

Naturally juicy and bursting with flavour
Now in season



Try this



A delicious, healthy treat created by nature



Shop now >

Domestic activity

Continuing with the existing campaign 'A Bunch of Joy', this season, messaging communicated the three core product attributes of taste, quality, and convenience. A strong call to action was used to drive awareness of peak season in each region.

The media approach targeted main grocery buyers 35-64 years old, with activities across the full path to purchase that supported the start of peak season in February. Channels used included digital display advertising, national radio advertising, social media advertising and Woolworths retail media (front-of-store screens, in-store radio and online via digital display advertising).

Some highlights from the campaign were:

- A national radio advertisement communicated Australian grapes' quality and taste profile and provided a call-to-action for each region. The advertising ran across Australian Radio Network and Southern Cross Austereo in five capital cities and WA markets. The activity reached over six million Australians.

- Digital display advertising promoted the quality and taste profile of grapes and showcased a series of delicious product and recipe images. The advertising featured across YouTube and NewsCorp-owned platforms. The national campaign delivered 523,381 impressions, and the WA campaign delivered 296,390 impressions.
- Social media posts on Facebook served 15.8 million opportunities to see the content, reached over 2.6 million Australians and achieved over 2.7 million engagements.
- Australian Grapes partnered with Woolworths to advertise on screens across the front of the store, on their in-store radio and online. These placements spoke to shoppers, reminding them to put Grapes in their baskets. The in-store activity drove high impressions (over 17 million), reached over 4.7 million Australians an average of 2.3 times and contributed to \$2.7 million in sales and 455,700 transactions. The online activity delivered 533,900 impressions, reached 91,600 Australians and contributed to \$4.1 million in sales and 701,200 transactions.

In 2021/22 the Hort Innovation Marketing function underwent a significant shift in their approach to investing marketing levies. You can read more about this in the 2021/22 Hort Innovation Company Annual Report at www.horticulture.com.au/annual-report-portal.

Minor use permits

The Hort Innovation Table Grape Fund supports the submission of applications for new and renewed minor use permits for the industry, as well as data generation activities to support chemical permits and registrations, and strategic agrichemical reviews.

Together these efforts provide industry access to safe, relevant and effective chemicals to manage pests, weeds and diseases.

For full details on these activities and links to relevant information, visit hortinn.com/table-grape-minor-use.



Minor use permits

Current permits

Below is a list of minor use permits for the table grape industry, current as of 15 August 2022.

Permit ID	Description	Date issued	Expiry date	Permit holder
PER11748 Version 2	Sodium metabisulfite / Table grapes (packaged) / Phylloxera	17-Sep-09	31-Oct-24	Australian Table Grape Association (ATGA) C/Hort Innovation
PER12439 Version 5	Trichlorfon / Table grapes / Queensland fruit fly and Mediterranean fruit fly	30-Aug-11	31-Mar-26	Hort Innovation
PER12770 Version 2	Glyphosate / Grapevine removal/destruction / Phylloxera	12-Oct-11	31-Dec-26	ATGA C/Hort Innovation
PER13378 Version 4	Fenbutatin-oxide (Torque Miticide) / Table grapes / Rust mite and two-spotted mite	09-Nov-12	31-Jul-25	Hort Innovation
PER14492 Version 3	Bifenazate (Acramite) / Table grapes / Two-spotted mite	12-Nov-13	31-Aug-25	Hort Innovation
PER13859	Dimethoate / Orchard cleanup – fruit fly host crops following harvest / Fruit fly	09-Feb-15	31-Jul-24	Growcom
PER85499	Sulphur dioxide and carbon dioxide / Table grapes (for export to New Zealand) / Red back spiders	28-Nov-17	30-Nov-22	ATGA C/Hort Innovation
PER85594	Methomyl / Table grapes / Redback spider (All States except NSW and WA)	19-Feb-18	28-Feb-23	Vitor Marketing Pty Ltd
PER89241	Spinetoram / Various including grapes / Fall armyworm	06-Mar-20	31-Mar-23	Hort Innovation
PER89259 Version 2	Chlorantraniliprole / Table grapes / Fall armyworm	06-Mar-20	31-Mar-23	Hort Innovation
PER89263	Emamectin (Proclaim Opti Insecticide) / Grapes (except grapes grown for dried fruit production) / Fall armyworm (<i>Spodoptera frugiperda</i>)	10-Mar-20	31-Mar-23	Hort Innovation
PER89278	Indoxacarb (Avatar Insecticide) / Grapes / Fall armyworm (<i>Spodoptera frugiperda</i>)	13-Mar-20	31-Mar-23	Hort Innovation
PER89293	Methomyl / Grapes / Fall armyworm (<i>Spodoptera frugiperda</i>)	10-Apr-20	30-Apr-23	Hort Innovation
PER89870	Spinosad (Entrust Organic) / Various including grapes / Fall armyworm	21-Jul-20	31-Jul-23	Hort Innovation

All efforts have been made to provide the most current, complete and accurate information on these permits, however you should always confirm all details on the APVMA website at portal.apvma.gov.au/permits. Details of the conditions of use associated with these permits can also be found on the APVMA site.

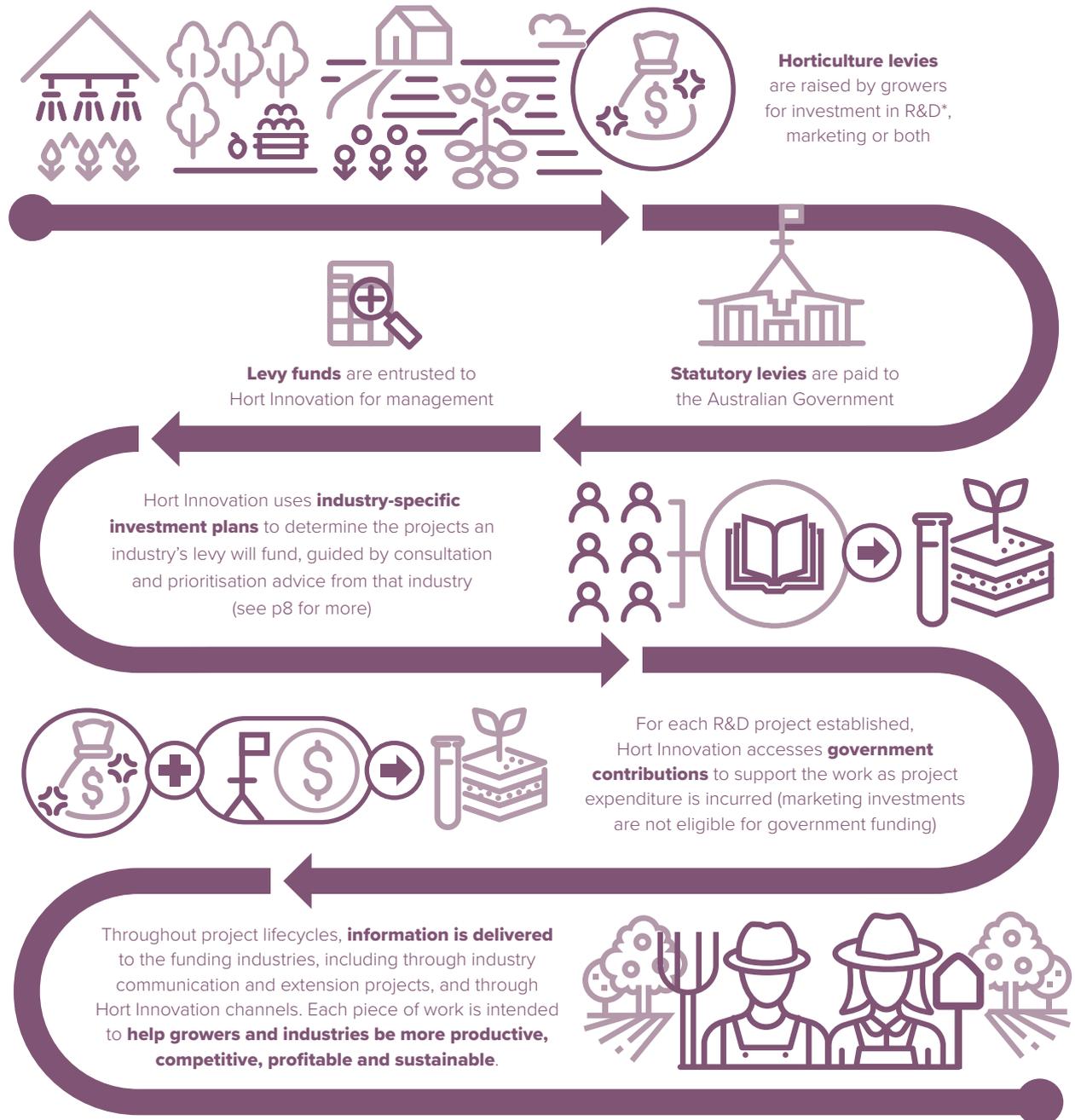
Keep up to date!

Find monthly minor use permit updates in our *Growing Innovation* e-newsletter.

Sign up for free at www.horticulture.com.au/sign-up.

How strategic levy investments are made in the Table Grape Fund

The below diagram shows how Hort Innovation makes strategic levy investments on behalf of horticulture industries. The table grape R&D and marketing levies were invested this way during the year, guided by the table grape Strategic Investment Plan 2022-2026 and advice from the industry’s investment advisory panel.



* Encapsulating extension and international trade

To learn more about funding specific to the Hort Innovation Table Grape Fund, visit www.horticulture.com.au/table-grape. During the year, other sources of funding were also used to support activities for the benefit of Australian horticulture, including grant funding secured by Hort Innovation, co-investment dollars brokered through our Hort Frontiers initiative and centralised strategic levy reserve.

Hort Innovation

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