



Nursery Fund

Annual Report 2019/20



Contents

- About Hort Innovation and the Nursery Fund 1
- About the year 1
- 2019/20 Nursery Fund snapshot 2
- Did you know? 2
- Just some of the things delivered for you during the year 3
- Making investments in 2019/20 4
- Investment planning and performance 5
- R&D project list 2019/20 6
- R&D report 8
- Marketing report 15
- Financial statement 19

About Hort Innovation and the Nursery 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 nursery R&D and marketing levies, together with Australian Government contributions, into key initiatives for growers, through the Hort Innovation Nursery Fund. We’re extremely proud of the work we do to help drive productivity, profitability and demand for nursery growers, and for the horticulture sector at large.

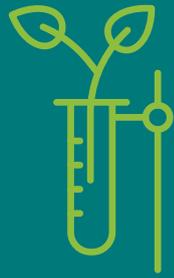
About the year

An intense and unpredictable year, 2019/20 certainly dealt challenges for the world, for Australian horticulture, and for Hort Innovation. There was ongoing drought, a devastating bushfire season, intense floods, the biosecurity threat of fall armyworm and, of course, the global and ongoing COVID-19 pandemic.

We encourage you to download a copy of the overarching Hort Innovation Annual Report 2019/20 at www.horticulture.com.au/annual-report-portal to better understand Hort Innovation’s responses to these events, and how the company was able to change its plans and priorities to best serve the sector.

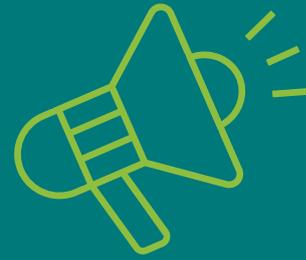
Through it all, though, activity in the Hort Innovation Nursery Fund remained strong. While some activities inevitably changed under COVID-19, it was still a solid year of investment. There was some \$2.34 million invested in R&D for the industry (including into nine new projects), plus \$808,000 in marketing. Read on for an overview of what was delivered.

2019/20 Nursery Fund snapshot



\$2.34M

invested in R&D



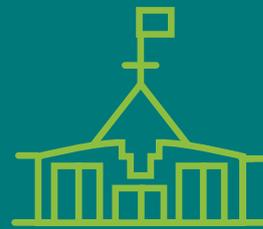
\$808,000

invested in marketing



29

active R&D
investments



\$2.13M

in levies collected
by the government and passed
on to Hort Innovation for investment

Did you know?



\$2.44B

The nursery industry is Australia's largest horticulture industry by value, with a production value of \$2.44 billion in 2018/19



1.34B

Production units (for example, live plants and starter plants) have been increasing significantly, growing from 0.76 billion units in 2016/17 to 1.34 billion in 2018/19



3

The majority of nursery production takes place in three states: Queensland (30 per cent), New South Wales (30 per cent) and Victoria (28 per cent)

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, for use by individual industries and the wider sector. The 2018/19 edition was released in early 2020 and, for the first time, features an interactive dashboard format for desktop users. See www.horticulture.com.au/horticulture-statistics-handbook.



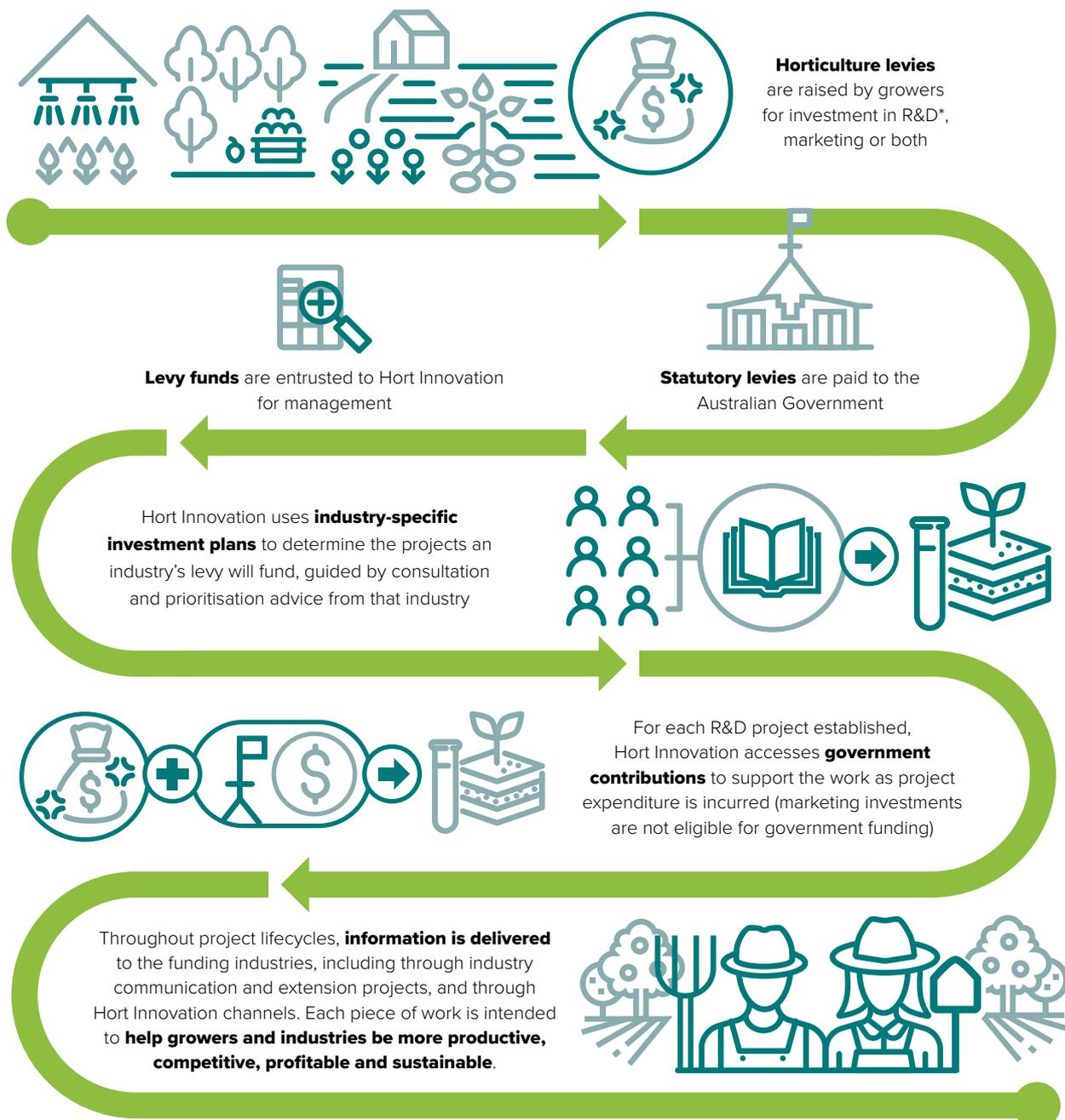
Just some of the things delivered for you during the year:

- ✓ **The industry communications program**, delivering the *Your Levy @ Work* newsletter and website (www.yourlevyatwork.com.au), monthly *Nursery Papers* and plenty more (see p14)
- ✓ **The nursery industry data tool**, which allows growers to benchmark core aspects of their business and can be requested by emailing communications@horticulture.com.au
- ✓ **A host of biosecurity-related programs** to help prepare and protect the nursery industry from possible pest and disease threats (see from p8)
- ✓ **Several key projects investigating and demonstrating the value of green space** and supporting green-space decision makers (from p10)
- ✓ **Information and data to assist through COVID-19**, including the new *Hort Innovation Insights* podcast (www.horticulture.com.au/webinars)*
- ✓ **Preparation support for fall armyworm**, including emergency minor use permits and an educational podcast series, www.bit.ly/armyworm-podcast*
- ✓ **A highly visible domestic marketing campaign**, centered around the Plant Life Balance initiative (www.plantlifebalance.com.au), plus ongoing work through Greener Spaces Better Places (www.greenerespacesbetterplaces.com.au)
- ✓ **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 2019/20 for more*

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

Making investments in 2019/20

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



* Encapsulating extension and international trade

To learn more about funding specific to the Hort Innovation Nursery Fund, visit www.horticulture.com.au/nursery. 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 reserves.

Investment planning and performance

During 2019/20, Hort Innovation continued to track investment expenditure against the Nursery Strategic Investment Plan, while looking towards new developments in 2021. Access an at-a-glance copy of the current investment plan at www.bit.ly/nursery-plan.

A performance analysis is coming

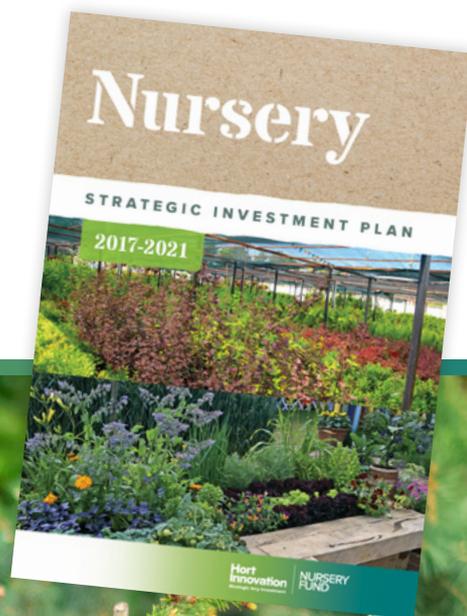
The industry's investment plan outlines key goals and outcomes for levy investment. With the plan due for renewal in 2021, Hort Innovation is undertaking a performance analysis to see how the industry has progressed against the current plan's ambitions. This will also help guide ongoing priorities for investment. Look for information to be published at www.horticulture.com.au/nursery in 2021.

See how your levy investments align to the industry's current plan

You can see how investment expenditure in the Hort Innovation Nursery Fund aligns to the industry's current strategic investment plan with the interactive analysis information available from www.bit.ly/nursery-investment. The analysis shows the allocation of funding against each of the nursery plan's outcomes, and gives an indication of the projects that are aligned to each outcome.

New ways of obtaining advice and setting priorities

In 2020/21, Hort Innovation will be implementing new ways of obtaining advice and setting priorities for industry investments. Renewed industry investment plans, plus new yearly (or as needed) program plans and new ways of consulting more broadly will mean more efficient investment and better outcomes for industry. Watch this space.



R&D project list 2019/20



NEW INVESTMENTS IN 2019/20

NY18010	Ensuring business continuity during biosecurity incursions – social and economic research learnings for the production nursery industry
NY19001	Where will all the trees be?
NY19003	Review of the biosecurity plan for the nursery industry
NY19005	Greenlife Industry Australia National conference and field day*
NY19006	Developing nursery industry career pathways
NY19007	Improving on-farm surveillance strategies for tospoviruses and thrips to enhance the biosecurity of the nursery industry
MT18008	National tomato potato psyllid and zebra chip surveillance
ST19018	Xylella insect vectors
ST19024	Digital remote monitoring to improve horticulture's environmental performance

ONGOING INVESTMENTS IN 2019/20

NY15002	Building the resilience and on-farm biosecurity capacity of the Australian production nursery industry
NY15004	National Nursery Industry Biosecurity Program
NY17008	Nursery industry statistics 2016/17 to 2019/20
NY17009	Improving pest management for the nursery industry
NY18001	Australian nursery industry communications program
NY18008	Nursery industry natural disaster risk mitigation and recovery plan
LP15001	Masterclass in Horticultural Business
LP15006	Attracting new entrants into Australian Horticulture – promoting careers in horticulture
MT16004	RD&E program for control, eradication and preparedness for vegetable leafminer

* This flagged project was both new and completed in 2019/20

[Continued >>](#)

ONGOING INVESTMENTS IN 2019/20 *(continued)*

MT17006 Improving preparedness of the Australian horticultural sector to the threat potentially posed by *Xylella fastidiosa* (a severe biosecurity risk)

MT17006 Xylella coordinator

MT18005 Improving plant industry access to new genetics through faster and more accurate diagnostics using next generation sequencing

MT18011 Ex-post impact assessment[^]

[^] This multi-industry project was a key monitoring and evaluation investment during 2019/20 – we encourage you to find the full details at www.horticulture.com.au/mt18011

INVESTMENTS COMPLETED IN 2019/20

NY18002 Global review of incentive schemes for the retention and successful establishment of trees on private urban land

NY18003 Budget tool to calculate the cost to successfully establish trees in the urban landscape

NY18005 Industry extension and development of Plant Life Balance

NY18007 National extension of a community engagement kit

MT16002 Green industry growing leaders program

MT17005 Improving the biosecurity preparedness of Australian horticulture for the exotic spotted wing drosophila (*Drosophila suzukii*)

ST16008 AgVet collaborative forum



R&D report

Take a closer look at some of the key investments in the Hort Innovation Nursery Fund during 2019/20. You can also visit www.horticulture.com.au/nursery at any time to access information on new, ongoing and completed projects, and to download resources produced by levy investments, such as fact sheets and guides.

Improving on-farm surveillance strategies for tospoviruses and thrips to enhance the biosecurity of the nursery industry (NY19007)

NEW IN 2019/20

Key research providers: The Victorian Department of Jobs, Precincts and Regions and The University of Queensland

This investment was established to help in the detection of tospoviruses and thrips, to enable rapid responses and reduce impacts in nursery production. It is:

- » Improving understanding of the prevalence and changing populations of tospoviruses species and thrips vectors in nursery production regions
- » Assessing the genetic variability and seasonal population dynamics of tospoviruses and thrips in nursery production systems, including the impact and interaction of neighbouring landscapes
- » Developing smart surveillance diagnostic tools
- » Developing, in consultation with industry members, a workable surveillance strategy for detection of exotic tospoviruses
- » Supporting the adoption of best management practices, including how new tools can be incorporated into existing nursery industry management and biosecurity systems such as BioSecure HACCP.

Ensuring business continuity during biosecurity incursions – social and economic research learnings for the production nursery industry (NY18010)

NEW IN 2019/20

Key research provider: Nursery & Garden Industry Queensland (NGIQ)

This investment is developing a practical decision support tool for the nursery industry to help quickly identify and implement actions during a biosecurity incursion event, with the aim of minimising social and/or economic damage and ensuring business continuity.

To this end, the project team is undertaking a review of current literature and surveying industry stakeholders to better understand the social and economic impacts of past biosecurity incursions, and to identify potential mitigating strategies that would support growers and minimise interruption to their nurseries.



Review of the biosecurity plan for the nursery industry (NY19003)

NEW IN 2019/20

Key research provider: Plant Health Australia

Beginning in 2020, this five-year investment is reviewing and updating the Australian nursery industry's current biosecurity plan. The plan is a top-level document that identifies high-priority endemic and exotic pests, diseases and weeds, along with the risk mitigation activities required to reduce their biosecurity threat, plus surveillance and diagnostic activities. It provides a strategic framework for the nursery industry and government to work together to improve preparedness for and response to potential threats.

The current nursery biosecurity plan is available from Plant Health Australia at www.planthealthaustralia.com.au/production-nurseries.

National tomato potato psyllid and zebra chip surveillance (MT18008)

NEW IN 2019/20

Key research provider: The Department of Primary Industries and Regional Development, Western Australia in collaboration with others

Tomato potato psyllid (TPP) is one of the world's most destructive horticultural pests. This is because the psyllid acts as a vector for the bacterium *Candidatus Liberibacter solanacearum* (CLso), which is associated with 'zebra chip' disease as well as 'psyllid yellows' in solanaceous plants.

In 2017, TPP was found to have established in Western Australia, but not to have spread further. This investment supports a critical national surveillance, identification and reporting program for the pest and CLso across Australia on behalf of the horticulture industry. Highly collaborative across states and territories, the program is designed for the early detection of and preparedness for TPP should it cross from Western Australia into other regions.



Digital remote monitoring to improve horticulture's environmental performance (ST19024)

NEW IN 2019/20

Key research provider: Various

In October 2019, Hort Innovation secured a \$2.9 million grant through Landcare's Smart Farming Partnerships program, supported by the Australian Government. Through project ST19024, and together with some levy contributions – including from the nursery industry – the funding is allowing work with partners to raise the horticulture sector's environmental performance.

The project involves collaborators including Hort Innovation, Applied Horticultural Research, Freshcare, Hitachi Consulting, Landcare and industry bodies Greenlife Industry Australia, AUSVEG, the Australian Banana Growers' Council, the Australian Macadamia Society and Growcom.

With a focus on protecting ecosystems in horticulture growing regions, it's establishing four demonstration 'smart farms' in the Great Barrier Reef catchment area. Here, remote technology will be used in the continuous monitoring of environmental indicators such as nutrient leaching, sediment run-off, water and energy use efficiency and more.

The demonstration sites will be used to help growers understand digital environmental monitoring and its use in business decision making and good environmental stewardship.

Developing nursery industry career pathways (NY19006)

NEW IN 2019/20

Key research provider: RMCG and Greenlife Industry Australia

This investment is working to attract new entrants and retain existing staff in all sectors of the Australian nursery industry, through the delivery of training programs and the showcasing of job opportunities. A key output of the project will be a career pathways guide that defines job roles and career trajectories throughout the industry, as part of a wider careers promotion toolkit.

The project team will be implementing the recommendations delivered by an earlier levy-funded project, which produced a clear roadmap for skilled career path development in the nursery industry in the short to medium term, and longer-term strategies to sustain an interest in working in the industry.

Where will all the trees be? (NY19001)

NEW IN 2019/20

Key research provider: RMIT University

This investment will provide the nursery industry and other key audiences such as councils, government and communities with an understanding of the current and possible future trajectories of urban forest cover across Australian cities.

This information will help inform the development of other Hort Innovation Nursery Fund investments, relating to both R&D and the levy-funded marketing initiative Greener Spaces, Better Places. It will also serve to highlight areas where increased consumption of green life products may be needed by governments, businesses, schools and consumers, to improve planning by the industry to cater for any increased demand.

The work follows earlier industry levy investments such as *Where should all the trees go?* (NY16005 and NY1700), which you can read about at www.horticulture.com.au/nursery, as well as work in the Hort Frontiers Green Cities Fund (www.horticulture.com.au/hort-frontiers).

Global review of incentive schemes for the retention and successful establishment of trees on private urban land (NY18002)

NOW COMPLETE

Key research provider: The University of Melbourne

Trees on private urban land are central to the ongoing plans of many global cities to increase urban canopy cover. As a part of this project, researchers gathered international expertise and reviewed case studies on the approaches that cities have used to retain, protect and plant trees on private lands.

The international consultations indicated that urban trees were mostly being lost on private land due to policies that supported urban densification and due to vague boundaries between public and private lands. Being specific about private land was a key recommendation identified to counter this problem.

Reviews of almost 100 case studies from around the world found most cities were governed by local laws and regulations in relation to removing or retaining trees. Refinement of local laws such as implementing further up-front tree removal payments, keeping track of protected trees and financial rebate programs were identified as potential solutions to retain more tree cover in private urban areas.

The researchers found that newer urban developments were most likely to go above minimum local law standards, though their effectiveness in retaining tree cover requires longer term monitoring. Considerations identified for retaining tree cover

in private urban land developments were the provision of tree bonds (where a payment is required prior to a development commencing) and tax rebates for retaining or planting trees in newly developed or re-developed sites.

Importantly, community support was a key factor in retaining and protecting private trees.

Visit www.bit.ly/ny18002 to learn more about the work and its findings.

Budget tool to calculate the cost to successfully establish trees in the urban landscape (NY18003)

NOW COMPLETE

Key research providers: Mosaic Insights, Natural Capital Economics and Alluvium Consulting

This investment delivered a tool to accurately calculate the costs and benefits of urban trees, allowing industries, developers and key stakeholders across all levels of government to effectively plan for the implementation of trees in urban landscapes. Understanding the true lifecycle cost of trees is intended to support better investment decisions, properly costed operational management, greater community confidence and, ultimately, a healthier urban forest.

The Tree Costing Tool is Excel based and comes with a detailed instruction manual, both available from www.bit.ly/tree-costing-tool.

National extension of a community engagement kit (NY18007)

NOW COMPLETE

Key research provider: Republic of Everyone

During May and September 2019, this project delivered a tour of educational events to support urban developers, decision makers, local governments and green space practitioners in understanding and communicating the economic, health, wellbeing and environmental benefits of urban greening.

There was a focus on the accessing and using a community engagement kit designed to help these audiences understand and upon current community attitudes to urban greening. This engagement kit was delivered through earlier Hort Innovation Nursery Fund project *Understanding the attitudes to urban green space for government and business audiences* (NY18006), and is available from the Greener Spaces Better Places website at www.greenspacesbetterplaces.com.au/guides.

Industry extension and development of Plant Life Balance (NY18005)

NOW COMPLETE

Key research provider: Republic of Everyone

Plant Life Balance is the nursery and garden industry's consumer facing program. It's backed by the Simple Science package of research from levy-funded R&D, detailing the air quality and wellbeing benefits of plants, and its centrepiece is the award-winning Plant Life Balance app – the world's first virtual reality greening app, which was launched in late 2017 through the Hort Innovation Nursery Fund's marketing program (www.plantlifebalance.com.au/the-app).

This short project, which took place during 2019, provided support at key industry events, delivered industry briefings and shared communications to help growers and other nursery industry participants be aware of and understand Plant Life Balance, including the assets and tools available for use in their own businesses.

Green industry growing leaders program (MT16002)

NOW COMPLETE

Key research provider: The Right Mind

From 2017 to 2019, this project delivered leadership education to participants from across the Australian nursery and turf supply chain who were motivated to further develop their leadership skills. The Growing Leaders Program was designed to develop leadership capability and capacity to transform the nursery and turf industries through vision, engagement, action, and leadership. It provided participants with positive exposure and networking opportunities with stakeholders from across the supply chain.

Case studies and learnings from industry participants are available at www.bit.ly/mt16002.

Greenlife Industry Australia National conference and field day (NY19005)

NEW IN 2019/20 & NOW COMPLETE

Key research provider: Greenlife Industry Australia

This investment provided funding for the Greenlife Industry Australia National Conference, held in Perth in early March 2020. The event, which had a theme of 'Healthy Plants, Healthy People', was an opportunity for nursery industry participants to come together to connect with and learn from each other and from expert speakers. It was tied into the UN-proclaimed International Year of Plant Health and included the communication of outcomes from levy-funded investments, with topics including the positive impact of greenlife on cooling cities, ensuring food safety and supply, and the nursery industry's contributions to Australia's economy.

Improving the biosecurity preparedness of Australian horticulture for the exotic spotted wing drosophila (*Drosophila suzukii*) (MT17005)

NOW COMPLETE

Key research provider: Plant Health Australia

Running from 2018 to 2020, this multi-industry investment improved awareness of the risks posed by spotted wing drosophila, which attacks a range of soft-skinned fruit, as well as enhanced Australia's capacity to detect and respond to any incursions of the pest.

Most importantly, this project developed a framework for modelling spotted wing drosophila establishment and movement throughout Australian regions, allowing for a comprehensive preparedness plan to be developed for a swift response in the event of an incursion. The plan includes an extensive list of recommendations for industry, including relating to surveillance, control techniques, engagement and awareness, and diagnostics.

The project also worked to build knowledge and capacity around appropriate surveillance and management tools and strategies within the growing industries, government and among other relevant stakeholders. It produced a range of materials for growers, including identification information, a fact sheet on spotted wing drosophila hosts, and a webinar detailing preparedness for the pest.

Full details and links to the project's resources – and final research report – can be found at www.bit.ly/mt17005.



National Nursery Industry Biosecurity Program (NY15004)

Key research provider: Greenlife Industry Australia (formerly NGIA)

The ongoing National Nursery Industry Biosecurity Program helps ensure production nurseries in Australia are aware of and prepared for incursions of exotic plant pests, and that they have effective market access mechanisms in place to maintain business functionality.

A key part of this investment is developing and maintaining industry on-farm biosecurity program BioSecure HACCP, to underpin national market access with electronic certification. BioSecure HACCP assists growers in assessing pest, disease and weed risks and supports the implementation of management strategies within businesses. It is one program under the Nursery Production Farm Management System (Nursery Production FMS), which is a nationally governed and administered system that also includes the EcoHort system and the Nursery Industry Accreditation Scheme Australia, or NIASA, Best Management Practice program.

This investment also carries out broader biosecurity-related activities for the nursery industry, including meeting industry obligations under the Emergency Plant Pest Response Deed (EPPRD), and maintains the industry's minor use permit program as needed.

You can learn more about BioSecure HACCP and how you can become certified on the Nursery Production FMS website, www.nurseryproductionfms.com.au.

Building the resilience and on-farm biosecurity capacity of the Australian production nursery industry (NY15002)

Key research provider: The Queensland Department of Agriculture and Fisheries

Ongoing through 2019/20, this project is enhancing the biosecurity preparedness of the Australian nursery industry by developing new pest and disease contingency plans and producing new and updated information for growers on on-farm biosecurity issues. Key project activities include:

- » Production of content and imagery for the industry's Pest Identification Tool (www.pestid.com.au), to make diagnostic identifications more financially viable for production nurseries
- » Delivery of biosecurity-focused webinars and workshops, with details circulated in industry channels as they become available
- » Development and updating of grower resources including pest management plans, fact sheets and contingency plans



- » Diagnostics, with samples submitted for analysis by pest and disease diagnostic service Grow Help Australia.

There are plenty of grower resources that have been produced by the project to date – you can access them from www.bit.ly/ny15002.

Improving pest management for the nursery industry (NY17009)

Key research provider: Greenlife Industry Australia (formerly NGIA)

This ongoing investment is helping to improve and inform pest management across the nursery industry. It has a focus on key areas of plant protection including chemical access, structured crop monitoring and integrated pest management, and is undertaking trials and producing information resources for growers, including information on the economic costs and benefits associated with approaches to pest management.

RD&E program for control, eradication and preparedness for vegetable leafminer (MT16004)

Key research provider: Cesar, in conjunction with others

Ongoing through 2019/20, this multi-industry project is bolstering preparedness for and protection against the potential spread of vegetable leafminer (*Liriomyza sativae*), as well as American serpentine leafminer (*Liriomyza trifolii*) and serpentine leafminer (*Liriomyza huidobrensis*), through Australian growing regions.

Project activities include developing information and resources for monitoring, managing and eradicating leafminers; identifying and modelling the spread of the pests; reviewing and looking at accessibility of chemical and biological control options; and generally increasing awareness and understanding of the leafminers in the relevant industries and in the community.

Xylella insect vectors (ST19018)

NEW IN 2019/20

Key research provider: Wine Australia

This project is a collaboration between Hort Innovation and Wine Australia to help safeguard Australia against the potentially catastrophic *Xylella fastidiosa*. This exotic bacteria impedes the movement of rising sap in plants and, were it to enter the country, it could threaten more than 350 commercial, ornamental and native plant species.

The project team is identifying and assessing insects in Australia that could potentially carry and transfer the bacteria, should it arrive on our shores. Developing an understanding of these potential insect vectors – including their feeding behaviour, population dynamics and range – will build essential knowledge to help in how xylella could be detected and contained in Australia.

The work is a partnership through the Plant Biosecurity Research Initiative (PBRI), a collaboration between Australia's seven plant-focused Rural RDCs, Plant Health Australia, the Department of Agriculture and other contributors, to coordinate plant biosecurity RD&E funding and efforts. You can learn more at www.pbri.com.au.

Xylella coordinator (MT17006)

Key research provider: Wine Australia

This multi-industry and multi-sector investment supports the role and activities of a national coordinator as part of a three year program to improve Australia's readiness for any potential incursion of *Xylella fastidiosa*. Like the project above, this is another joint initiative between Hort Innovation and Wine Australia, through the PBRI.

Improving preparedness of the Australian horticultural sector to the threat potentially posed by Xylella fastidiosa (a severe biosecurity risk) (MT17006)

Key research provider: The Victorian Department of Jobs, Precincts and Regions

Adding to the PBRI's xylella work, this multi-industry investment will allow Australia to adopt world's best practice methods for detecting and identifying strains of the *Xylella fastidiosa* bacteria, should it come to our shores. As well as developing state-of-the-art diagnostic tools, technologies and protocols to screen plant material entering the country and to support active surveillance programs, it will provide associated training to technical staff in diagnostic laboratories.

The project's work will ultimately allow for quick and effective detection of what is considered to be the number one plant biosecurity threat to Australia and New Zealand, to facilitate a swift and sure response.

Improving plant industry access to new genetics through faster and more accurate diagnostics using next generation sequencing (MT18005)

Key research provider: Queensland University of Technology

This investment is tasked with supporting the adoption of 'next generation sequencing' in the screening of imported horticultural plant material in post-entry quarantine facilities. The technology has the potential to allow plants to move through the quarantine process much more quickly – allowing industry speedier access to new genetic stocks. Learn more at www.bit.ly/mt18005.

Nursery industry natural disaster risk mitigation and recovery plan (NY18008)

Key research provider: Nursery & Garden Industry Queensland (NGIQ)

This ongoing investment is assessing the potential for natural disasters and severe weather events to impact upon the Australian production nursery industry. It is also helping to develop strategies and resources for better preparedness, speedier recovery and stronger resilience.

As part of the work in identifying natural hazards such as bushfires, floods and cyclones, the project is developing a risk map for the industry. It is also producing an official Natural Disaster Recovery Action Plan and, specifically for growers and nursery businesses, it's developing a risk mitigation and management best practice guide, which will be integrated into the industry's Best Management Practice (BMP) program.

Nursery industry statistics 2016/17 to 2019/20 (NY17008)

Key research provider: Greenlife Industry Australia (formerly NGIA)

The Excel-based nursery data tool brings together key industry statistics including volume and value of production, to allow nursery growers and the broader industry to benchmark the core aspects of their businesses. The tool also allows users to make timely and effective decisions in planning and resource prioritisation, as well as track market trends and industry performance over time.

This project continues to support the collection and dissemination of data and is building upon and producing

Continued >>

updated versions of the nursery data tool, providing an ongoing resource for industry and allowing validation of the information over multiple years.

Nursery levy payers can access a copy of the current nursery industry data tool by emailing communications@horticulture.com.au.

Australian nursery industry communications program (NY18001)

Key research provider: Cox Inall Communications, with support from Greenlife Industry Australia

The industry's ongoing communications program ensures Australian nursery and garden growers and other industry stakeholders are kept up to date with the latest news, information and R&D and marketing updates to support decision making within businesses.

This investment produces and maintains a number of regular communication channels, including but not limited to:

- » Monthly *Nursery Papers* looking at current industry projects, with all issues included in issues of the *Hort Journal* and available via www.bit.ly/nursery-papers
- » The monthly *Your Levy @ Work* newsletter, which you can sign up for at www.yourlevyatwork.com.au
- » The industry website, www.greenlifeindustry.com.au
- » Greenlife Industry Australia social media channels including Facebook (www.facebook.com/GreenlifeIndustryAU), Twitter (www.twitter.com/Greenlife_AU), YouTube (www.bit.ly/gia-youtube) and LinkedIn (www.bit.ly/gia-linkedin)
- » Written and video grower case studies, searchable on the news section of the industry's website
- » Podcasts discussing the latest industry findings, news and events
- » Annual industry 'facts at a glance' digests, providing an overview of industry statistics based off other levy-funded work
- » Media releases.

Masterclass in Horticultural Business (LP15001)

HORT FRONTIERS

Key research providers: University of Tasmania in partnership with Lincoln University and Wageningen Research Academy

The Masterclass in Horticultural Business course was developed under the Hort Frontiers Leadership Fund and is aimed at fostering new innovators and leaders for the Australian horticulture industry. Best described as a 'mini MBA', it's a nine-month course where participants develop their business skills and build their own business plans for the future. The course is delivered predominantly online, with several face-to-face sessions and field trips to some of Australia's savviest horticulture outfits.

Nursery levy has been co-invested into the Masterclass investment to support scholarships for industry levy-payers since 2017, with four awarded for the 2019 course and five spots offered for the 2020 Masterclass.

Attracting new entrants into Australian horticulture (LP15006)

HORT FRONTIERS

Key research provider: Rimfire Resources

This project is part of the Hort Frontiers Leadership Fund and is about engaging graduate students with the horticulture industry. It involves a Graduate Engagement Program with a two-phased approach designed to attract the right people, retain them and support their ongoing leadership development.

The first phase involves students undertaking internships within horticulture business, for which funding support is offered for both the student and the business. The second phase involves employment of students following graduation, with Hort Innovation co-investing to support the first-year salary and participation in a five-day leadership program.

This initiative involves co-investment from various levy industries and from additional sources. See www.horticulture.com.au/hort-frontiers for more on Leadership Fund activities.



Marketing report

Hort Innovation is responsible for investing the nursery marketing levy into a range of activities to drive awareness and support the use of Australian nursery products, under the Hort Innovation Nursery Fund. Read on for a snapshot of activities and results from 2019/20.

Plant Life Balance

The Plant Life Balance campaign is designed to get more Australians buying more green life for their homes, both indoors and out. It's the lead consumer program for the nursery industry, and 2019/20 marked its third full year.

Plant Life Balance combines fashion and styling for homes with science that focuses on the two fundamental benefits of including more plants in the home environment: air quality and wellbeing. The campaign uses digital tools and social media to connect with a target audience of women aged between 25 to 35, to help build their confidence and inspire them to get more 'plant life balance' in their lives.

The Plant Life Balance audience is a new wave of plant lovers. Young, female, renters or first homeowners with busy lives and possibly first time or soon to be parents. They are digitally connected, socially savvy and fashion conscious. They are experienced at keeping their plants alive and what's more, they are emotionally attached to their plants, which is excellent for industry.

SOCIAL AND DIGITAL PROMOTION

The primary objective of the Plant Life Balance social media campaign in 2019/20 was to drive engagement and promote traffic to the Plant Life Balance website (www.plantlifebalance.com.au). Strong results were seen across both Facebook (www.facebook.com/plantlifebalance) and Instagram ([@myplantlifebalance](https://www.instagram.com/myplantlifebalance)) channels. During the year, the Plant Life Balance social community surpassed 100,000 followers, becoming one of the largest online plant communities in the country, and a go-to source for advice and inspiration. The Plant Life Balance Facebook and Instagram reached 12.6 million plant-loving consumers, an increase of 53 per cent from the previous year. Engagement averages across both channels remained high, well exceeding industry averages. The Plant Life Balance blog (www.myplantlifebalance.com.au) and the e-newsletter consumers can sign up to through the site continued to drive engagement. The Plant Life Balance media team has also positioned the brand as the go-to for media seeking content and comment.



This meant that during 2019/20, there were consistent in-bound enquiries which then became media stories. Plant Life Balance media campaigns generated 96 pieces of media coverage with more than 3.5 million in reach.

THE PLANT LIFE BALANCE TREND REPORT

The first-ever trend report for the Australian nursery industry was developed and released by Plant Life Balance in December 2019, off the back of research commissioned to understand consumer behaviours when it comes to adding more green-life to their home. The report was launched to a mixture of consumer lifestyle and horticulture media, as well as industry stakeholders. The launch briefing provided media targets with an opportunity to hear from experts about the expected plant-related trends for 2020. The report played a critical role in driving media engagement, content and key trend information back to industry.

THE PLANT LIFE BALANCE EVENT SERIES

In 2019/20 the Plant Life Balance event series was held in various greened businesses that brought together plant lovers to hear from and be inspired by other influential plant lovers, including industry. The events were oversubscribed and proved a success, generating media and ongoing social followers, however the program needed to be curtailed due to COVID-19 restrictions in 2020. The Plant Life Balance event series was due to tour five states in 2020, however as COVID restrictions were brought in, this program was quickly adapted.



Greener Spaces Better Places

WORKING WITH STAKEHOLDERS

The industry previously invested in the 2020 Vision program, established with the goal of increasing green life in major urban areas by 20 per cent by 2020. In October 2019 the program was successfully rebranded to Greener Spaces Better Places, providing a longer-term platform and brand to continue to promote the benefits of nursery products across key audiences. This program initially focused on supporting influencers and decision makers, particularly business to business and local government audiences. It has now moved to engaging consumers and communities, aligning with the increasing green movement across Australia. The program has created and uses a panel of experts called the Living Network who help communicate the benefits and value of green life in the urban environment.

Levy-funded research outcomes have underpinned this marketing approach, with the program remaining a priority focus in leading and supporting activities that drive increased demand

for green life products and services. The Greener Spaces Better Places program has enabled the nursery industry to maintain its position as the go-to industry providing beneficial solutions for how people interact with nature to improve their lives, health and environments.

ENGAGEMENT KITS

Following the success of retailer and industry event kits, these were extended into 2019/20 to help key stakeholders continue to engage with content and promote reach. Both industry and retailers were able to order their kits to be delivered directly to them.

BUSINESS

The focus of the program's business stream for 2019/20 was to support the inclusion of urban green space into new Green Building Council of Australia rating tools for buildings and communities (with earlier work in the nursery's R&D program feeding into this – see www.bit.ly/ny16007). Excitingly, the latest proposed rating tools for 'New Building' and 'Community' have a Nature category. The new rating tools were expected to be released towards the end of 2020.



THE PRESS OFFICE

Running an ‘always on’, proactive and reactive media function for Greener Spaces Better Places ensured the value of more trees and plants was always in the spotlight. It included the daily monitoring, listening, evaluation and reporting of media conversations for intel and opportunities. This resulted in over 120 media articles and/or interviews with an estimated reach of over nine million impressions across urban greening decision-makers. It included prestige pieces through ABC TV and ABC online, *Domain* and *The Conversation*. Management of the Living Network advocate program is also run via the Press Office, which you can learn more about at www.greenspacesbetterplaces.com.au/network.

Impact of COVID-19

In response to the COVID-19 pandemic, the nursery marketing program met with key stakeholders such as Greenlife Industry Australia, the state Nursery and Garden Industry associations, and the Plant Life Balance and Greener Spaces Better Places teams, to ensure a coordinated industry response to the crisis.

The Greener Spaces Better Places and Plant Life Balance programs responded to the pandemic in four key ways: conducting a government ‘pulse check’ report; implementing a dedicated public relations and media campaign; pivoting the planned content for digital and social media; and creating dedicated resources for retailers to boost sales during the pandemic.

GOVERNMENT ‘PULSE CHECK’ RESEARCH

The purpose of this research was to understand the attitudes, concerns and needs of green space professionals at local and state levels of government, in relation to the COVID-19 crisis. In particular, the research sought to understand the state of urban greening programs, the key challenges to maintaining them, and immediate opportunities that existed to support green space professionals in continuing to deliver the health and wellbeing, environmental and economic benefits that vital green spaces provide.

MEDIA AND PUBLIC RELATIONS

Dedicated media campaigns for both the Plant Life Balance and Greener Spaces Better Places programs were implemented to emphasise the importance of living a life in green during COVID-19, whether by greening the home or by safely spending time in public green space (in alignment with official guidelines and directives). This quickly produced media campaign highlighted the importance of green space while social distancing, showing best practice case studies from key local governments. Additionally, a second phase media campaign was conducted in June 2020 based on the pulse check findings. A potential audience of over 600,000 government, business and industry decision makers were reached in titles such as *Government News*, *6PR*, and *Architecture and Design*.

DIGITAL AND SOCIAL MEDIA CONTENT

The Plant Life Balance blog and social media channels (Instagram and Facebook) also swiftly pivoted their content plans to feature targeted and appropriate COVID-19 messaging, around the themes of:

- » *Mental health and wellbeing*, with a focus on gardening as therapy
- » *Grow your own*, encouraging Australians to supplement their store-bought produce with fresh vegetables, fruit and herbs from the local nursery
- » *Things to do*, providing inspiration of plant and gardening activities to relieve boredom
- » *Physical health and happiness*, with tips and tricks to create the healthiest space possible with plants
- » *Getting outdoors*, which reminded the audience that nature had not been cancelled and that it’s essential to switch off, step outside and give your mental health a boost through time in nature.
- » *Home tours*. In a Plant Life Balance first, video interviews were conducted with green-thumb influencers, who filmed themselves as they toured their home and answered questions about how plants were helping them stay positive in lockdown.

Backyard

CREATIVE AUSTRALIAN LIVING

SPECIAL
INDOOR
PLANTS
ISSUE

Throughout the campaign, Plant Life Balance social channels ran ads with the objective of increased website visits, e-newsletter sign ups, and profile reach, targeting plant buying Australians to buy more plants while in isolation. The social channels also leveraged the COVID-19 blog content to drive more visitation to the Plant Life Balance website.

RETAILER SUPPORT

Plant Life Balance developed COVID-and-beyond marketing support resources for nursery and garden centres around the theme, '10 ways to improve sales right now: plant marketing in the time of COVID-19'. These resources included a web page guide, a downloadable PDF and a case study video containing tips, ideas and inspiration to boost nurseries' marketing efforts during COVID-19. Although the guide was specifically designed to help nurseries respond to the COVID-19 situation, these ideas will also be highly relevant once the crisis is over. The response from independent retail nurseries facing challenges from lockdowns, social distancing, changes to foot traffic into store and an increased demand for online solutions was incredibly well received, highlighting ongoing potential for marketing resources and knowledge sharing back to retailers in the future.



Financial statement

Financial operating statement 2019/20

	R&D (\$)	MARKETING (\$)	TOTAL (\$)
	2019/20 July – June	2019/20 July – June	2019/20 July – June
OPENING BALANCE	413,547	87,387	500,935
Levies from growers (net of collection costs)	1,233,679	896,594	2,130,272
Australian Government money	1,374,139	–	1,374,139
Other income*	7,621	(120)	7,501
TOTAL INCOME	2,615,439	896,474	3,511,913
Project funding	2,335,492	807,726	3,143,218
Consultation with and advice from growers	16,076	8,656	24,733
Service delivery – base	107,156	40,137	147,293
Service delivery – shared	154,555	57,633	212,187
Service delivery – fund specific	135,000	115,000	250,000
TOTAL EXPENDITURE	2,748,279	1,029,152	3,777,431
Levy contribution to across-industry activity	–	–	–
CLOSING BALANCE	280,707	(45,291)	235,417
Levy collection costs	35,538	25,890	61,428

* Interest, royalties

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