International Market Access Assessment Panel

Handbook and application templates

2026

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Handbook and application templates

International trade negotiations are complex and resource-intensive affairs and often take many years to complete. The Australian Government is responsible for conducting and concluding trade agreements.

Hort Innovation collaborates in this process by administrating the International Market Access Assessment Panel (IMAAP). This Panel acts on behalf of the horticultural sector to provide transparent, unbiased and consistent market access advice to the Australian Government.

The International Market Access Assessment Panel

The International Market Access Assessment Panel (Panel) comprises a Chair and a Deputy Chair appointed from the Hort Innovation Board of Directors and a number of industry experts who sit external to both Hort Innovation and the Australian Government.

Guided by pre-defined criteria, the Panel evaluates each market access application on its individual merit to determine if the export of the good is technically viable, supported broadly by industry, ready for export to the requested market and likely to result in sustained and profitable long-term international trade. In this manner, the Panel only acts as an advisory mechanism to the Government, informing whether a market access request is likely viable and sustainable.

Market access requests supported by the Panel will be passed to the Australian Government Department of Agriculture, Fisheries and Forestry (the department) for consideration and potential escalation to future international trade negotiations should the opportunity present. It is essential to emphasise that the nature of international relations requires that international trade negotiations consider broader national interests, which are not always apparent or aligned with a market access request approved by the Panel.

International requirements

International exports of Australian horticultural products are subject to the global trade rules and obligations of the World Trade Organisation (WTO). According to these rules, horticultural exports must meet biosecurity requirements, which may also include phytosanitary measures established by the importing country.

Importing country requirements, Australia's domestic pest and disease status, and international phytosanitary standards are constantly changing and evolving. As such, the development, maintenance and improvement of the conditions that allow our products to gain access to the foreign market is a complex and dynamic process. These complexities are compounded by the political and economic agendas of trading partners. So, this process requires an ongoing effort to ensure that Australian horticultural products are accepted abroad and that our reputation as a premium food supplier is maintained.

Requests

Applications for new market access or an improvement to existing market access may be lodged by companies, industry bodies or state and territory government departments. However, all applications will be assessed against the same criteria, including demonstration of national benefit and should indicate national consultation.

Where possible and available applicants should include information from recognised and reliable sources.

Eligibility and evaluation criteria

For consideration, all applications must meet the following criteria:

- The Australian Government is the appropriate body to address the request
- A detailed business plan for the target market is provided (see more details below)
- Should the application pertain to access to a new market, the industry Export Strategy must have classified it as a priority market and the business plan must be aligned with the Export Strategy
- Data to satisfy phytosanitary or other technical requirements for export have been developed and presented (if relevant to the application), and producers and exporters are able to meet them. A clear technical assessment is available to support the preferred pathway to meet the importing country's anticipated requirements
- The application is supported by the national industry, including growers, exporters, industry bodies, states and territories.

Business plan

The business plan should present the following information:

- Pests and diseases of concern to the target market
- Relevant treatment data or measures applicable to meet phytosanitary requirements
- Supply and demand analysis of the commodity in the requested market
- Market price analysis and the expected trading price
- Total expected added value
- Evidence that the industry is ready to export and is able to meet pricing expectations
- Sustainability of the proposed trade across the supply chain.

All applications will be evaluated against the pre-defined criteria described in Appendix C. These criteria will be used to verify the level of stakeholder support and industry inclusion in the proposal, as well as determine the feasibility of the proposal and ensure that the pathways and processes meet technical and logistical requirements.

Commercially confidential information submitted as part of an application will be kept confidential by Hort Innovation, subject to its standard privacy policy. All commercially sensitive information must be clearly marked as such.

Stakeholders should note that information related to market access requests is trade-sensitive and will generally not be made publicly available.

IMAAP Process

Stage I: Pre-submission

Developing market access requests can be a time-consuming endeavour. Applicants are encouraged to contact the Market Coordination and Strategy Team, Biosecurity Plant Division of the Department (mcs@agriculture.gov.au) before undertaking the application process to discuss ambitions and feasibility. Hort Innovation should be contacted for advice on eligibility and the application process.

The applicant is solely responsible for developing new market access or market improvement request submissions (Appendices A and B). Applicants are advised to seek broader industry and/or state government involvement and assistance to provide accurate information supporting the application.

Funding from Hort Innovation may be requested to develop an export strategy for the industry or generate data to support the application. The Hort Innovation International Trade Team can advise on this process.

Stage II: Submission

All applications must be submitted using the relevant standard form found on the Hort Innovation Market Access website:

- Appendix A – New market access application
- Appendix B – Market improvement application

The following documents must be attached along with the completed application form:

- Business plan
- Industry Export Strategy
- Letters of support from relevant industry stakeholders (at least two).

Please refer to the evaluation table in Appendix C to assist in preparing your submission. Failure to provide all relevant information may result in unnecessary delays in the application process.

Stage III: Preliminary screening

Hort Innovation screens applications for eligibility and compliance with evaluation criteria. Applications are scored according to the evaluation table in Appendix C.

Incomplete applications with a score of less than 50% of the maximum assessment or that meet a STOP criterion* will be returned to the applicant for further refinement and discussion.

Applications approved in the preliminary screening will be tabled at the next IMAAP meeting.

Stage IV: Formal panel assessment

The International Market Access Assessment Panel comprises a Chair and Deputy Chair appointed by the Hort Innovation Board of Directors and four independent members assigned through a public expression of interest process. Panel observers may include representatives from Hort Innovation, from the department and other government Departments (state/territory or federal).

The advice of observers may be requested by the Panel if necessary. However, observers do not have the right to vote on the applications. Terms of Reference for the Panel are included in Appendix D.

The Panel usually meets at six-month intervals or on an as-required basis. For enquiries relating to the scheduling of Panel meetings, please contact Hort Innovation.

Panel members and relevant observers will review all market access applications at each meeting against the evaluation criteria outlined in Appendix C. This evaluation will identify whether an application is suitable to be progressed to the department, or identify whether the assessment criteria have not been met and additional information is required. Additional details regarding the function of the Panel are provided in Appendix D.

Upon completion of the IMAAP evaluation process, Hort Innovation will formally notify the department and the candidate of the panel outcome.

Please note that, in the interest of the sensitive commercial nature of international trade negotiations, outcomes of the IMAAP assessment will not be publicly announced and elements of some decisions may be required to remain confidential.

Stage V: Allocation to a pool

Country-specific pool

Applications for new market access or market improvement approved by the Panel will be allocated to a country-specific pool and await further prioritisation by the department. Applications within a country-specific pool are unranked.

Applications in the country-specific pool that have not progressed after three years may be reviewed and updated by the applicant or on request. This ensures that the details remain up-to-date and aligned with the industry's ambitions.

* STOP criteria are listed in Appendix C.

Hort Innovation will contact the applicant to facilitate the review process. Updated applications will be subject to reassessment by the Panel.

Stage VI: Australian Government prioritisation

Ahead of a new negotiation window with a foreign trading partner, the department will assess applications within the specific pool of that market to determine the next negotiation priority.

The department determines which market access requests to pursue using it’s established internal assessment process and defined principles and criteria. All requests within a country pool are considered. In assessing each application, the department considers additional information from across the department, industry, the overseas agriculture counsellor network, trading partners, and other government departments (state/territory and federal).

Further details of the department’s internal plant market access prioritisation process are provided in Appendix F. The department may, at this stage, consult with the Panel and/or the applicant to confirm the continued merit and currency of applications.

Please note that international trade negotiations are not the responsibility of the Panel or Hort Innovation.

Appendix A

New market access application form

This document is Hort Innovation's standard application template for **new market access applications** to be assessed by the International Market Access Assessment Panel. Before completing this form, please refer to the accompanying guide, which can be found on the Hort Innovation website.

Product:

Target market(s):

Name:

Phone number:

Email address:

Organisation:

Position / role:

Date of submission:

Requirements and attachments

All new market access submissions must include:

- ☐ Appendix A - New market access application form (this form). Templates can be found on the Hort Innovation Market Access website.
- ☐ A detailed business plan for the target market. **The content filled in this application form must summarise the information presented in the business plan**.
- ☐ An Export Strategy for the industry aligned with the request. Please note that strategic funds may be applied through Hort Innovation to support the development of an Export Strategy should one not exist.
- ☐ Documentation evidencing solid industry support nationally. Such documentation may include letters from Peak Industry Bodies or State Industry Bodies.
- ☐ Supporting data to satisfy phytosanitary or other technical requirements for export have been developed and presented (if relevant to the application).

Questions

1.	**Economic analysis: assessment of a significant and sustainable economic return from trade once established**
1.1	**Credibility and robustness of the supply/demand analysis and business plan within the industry's Export Strategy**
1.1 a	Briefly summarise the outcomes you seek from submitting this application (100 words or less). *Please ensure the attached business plan aligns with this summary*.
1.2	**Market opportunity assessment**
1.2 a	What is the expected added value for industry from accessing this market? Briefly explain your calculation by providing the expected annual value in millions of AUD and the percentage growth compared to your industry's current exports.
1.2 b	What is the annual volume of domestic production and total imports of the commodity in the target market over the last 10 years (tonnes/year)?
1.2 c	What percentage (%) of total market share is imported from other trading partners? Please provide a breakdown by country.
1.2 d	What proportion (%) of the market can the Australian industry likely expect to secure in the target market/country?
1.3	**Contribution (% of production) to the commodity**
1.3 a	What proportion of production would this opportunity represent for the Australian industry? (%)
1.4	**Accessibility of the market across the industry – the proportion of producers**
1.4 a	What percentage of producers will be able to access this market? (%)
1.4 b	Are there any regional limitations to accessing this market? If yes, please provide details on the nature and type of these limitations. (300 words or less)
1.5	**Alternatives for market expansion by the industry**
1.5 a	Provide details of your industry's exports to other markets, and the efforts that have been taken to develop and expand those markets (please attach additional details if there are more than five markets).

Market/Country	Volume (tonnes/yr)	Value (AUD/yr)	Steps taken to develop the market (bullet points)

2.	Technical analysis: assesses the ability to overcome technical barriers to trade (phytosanitary)
2.1	**Clarity of the request in terms of the commodity and trade, pests and diseases of concern, and preferred measures**
2.1 a	Does your business plan clearly identify the commodity, target market, pests and diseases of concern and relevant treatment data and measures? ☐ Yes ☐ No
2.2	**Ability of the proposed treatment pathway to meet market phytosanitary requirements**
2.2 a	Are suitable data sets available to support the preferred treatment pathway? Please provide specific details (250 words or less).
2.2 b	Do you have information on the likely acceptance of the data sets in the target market. Please provide details (250 words or less).
2.3	**Existence of international standards that would facilitate negotiation**
2.3 a	Is the trade subject to international standards that would facilitate the negotiation or other precedents? If so, please provide details (250 words or less).
2.4	**Market access feasibility assessment**
2.4 a	Does the target market have clear, efficient processes to provide market access? Are barriers such as legislative change and political or cultural barriers evident? Please provide details (250 words or less).
2.5	**Expectation of market willingness to engage**
2.5 a	Do you have any information about the willingness of the proposed market to import the commodity from Australia? For example, high demand for the product, whether domestic industries need to be managed, current political climate, etc. (150 words or less).
2.6	**Industry and supply chain ability to implement the measures and comply with expected protocol**
2.6 a	Will access to the proposed market fit into existing systems and supply chains? ☐ Yes ☐ No Provide details of industry and supply chain ability to implement any measures and meet expected protocol (500 words or less).
2.6 b	Are there any significant compliance requirements in the target market that may impact trade utilisation (such as MRLs, food safety requirements or other non-tariff measures)? If yes, please provide details for how these will be managed or met (250 words or less). ☐ Yes ☐ No
2.7	**Viability of the measures for the market – e.g. quality, shelf life, cost of compliance, etc.**
2.7 a	How will the proposed phytosanitary measures affect the commercial viability of the commodity, including impacts on quality, shelf life, and compliance costs? (250 words or less)

2.8	**Potential for replicating market access in other markets**
2.8 a	Will access to this particular market create a precedent for replication in other markets? ☐ Yes ☐ No If yes, please provide details (250 words or less).
3.	**Market analysis: assesses the feasibility of establishing sustainable trade regarding production, supply chain, and marketing**
3.1	**Evidence of market interest in the Australian product (competitive advantage)**
3.1 a	Is there a high demand in the target market for the product? ☐ Yes ☐ No Provide details of consumption trends, competitors, and necessary marketing activities (250 words or less).
3.2	**Industry capacity to meet demand in terms of available production**
3.2 a	How the industry will meet anticipated demand for the product in terms of capacity and available production (250 words or less).
3.3	**Industry experience with export under similar parameters**
3.3 a	Provide information on industry experience with exports under similar parameters. If limited experience, please discuss how the industry will adapt or establish (250 words or less).
4.	**Industry analysis: assess industry support for the market access request**
4.1	**Priority for the industry, as expressed in its Export Strategy**
4.1 a	What level of priority is attached to this application in the attached industry Export Strategy?
4.2	**The extent of support in the industry**
4.2 a	Does support for prioritising this application exist across the industry? ☐ Yes ☐ No Please reference the industry representative bodies and a broad cross-section of growers (250 words or less).
4.2 b	Does any opposition to this application exist across the industry? ☐ Yes ☐ No If yes, please provide details (250 words or less).
4.3	**Evidence in the business plan for commitment to sustained economic trade**
4.3 a	Outline the commitment to sustained economic trade, including stakeholder support across the supply chain. Where key support is lacking, explain and describe any planned actions.
NA	Please provide any other statements or relevant information in support of your application that has not been addressed here (250 words or less).

Appendix B

Improved market access application form

This document is Hort Innovation's standard application template for **improved market access** to be assessed by the International Market Access Assessment Panel. Before completing this form, please refer to the accompanying guide, which can be found on the Hort Innovation website.

Product:

Target market(s):

Name:

Phone number:

Email address:

Organisation:

Position / role:

Date of submission:

Requirements and attachments

All improved market access submissions must include:

- ☐ Appendix B - Improved market access application form (this form). Templates can be found on the Hort Innovation Market Access website.
- ☐ A detailed business plan for the target market. **The content filled in this application form must summarise the information presented in the business plan**.
- ☐ Documentation evidencing solid industry support nationally. Such documentation may include letters from Peak Industry Bodies or State Industry Bodies.
- ☐ Supporting data to satisfy phytosanitary or other technical requirements for export have been developed and presented (if relevant to the application).

Questions

1.	**Economic analysis: assessment of a significant and sustainable economic return from trade once established**
1.1	**Credibility and robustness of the supply/demand analysis and business plan within the industry's Export Strategy**
1.1 a	Briefly summarise the outcomes you seek from submitting this application (100 words or less). *Please ensure the attached business plan aligns with this summary*.
1.4	**Accessibility of the market across the industry – the proportion of producers**
1.4 a	What percentage of producers will be able to access this market? (%)
1.4 b	Are there any regional limitations to accessing this market? If yes, please provide details on the nature and type of these limitations (300 words or less).
2.	**Technical analysis: assesses the ability to overcome technical barriers to trade (phytosanitary)**
2.2	**Ability of the proposed treatment pathway to meet market phytosanitary requirements**
2.2 a	Are suitable data sets available to support the preferred treatment pathway? Please provide specific details (250 words or less).
2.2 b	Do you have information on the likely acceptance of the data sets in the target market? Please provide details (250 words or less).
2.3	**Existence of international standards that would facilitate negotiation**
2.3 a	Is the trade subject to international standards that would facilitate the negotiation or other precedents? If so, please provide details (250 words or less)
2.4	**Market access feasibility assessment**
2.4 a	Does the target market have clear, efficient processes to provide market access? Are barriers such as legislative change and political or cultural barriers evident? Please provide details (250 words or less).
2.5	**Expectation of market willingness to engage**
2.5 a	Do you have any information about the willingness of the proposed market to import the commodity from Australia? For example, high demand for product, whether domestic industries need to be managed, current political climate, etc. (150 words or less).
2.6	**Industry and supply chain ability to implement the measures and comply with expected protocol**
2.6 a	Will access to the proposed market fit into existing systems and supply chains? ☐ Yes ☐ No Provide details of industry and supply chain ability to implement any measures and meet expected protocol (500 words or less).
2.6 b	Are there any significant compliance requirements in the target market that may impact trade utilisation (such as MRLs, food safety requirements or other non-tariff measures)? If yes, please provide details for how these will be managed or met (250 words or less). ☐ Yes ☐ No

2.7	**Viability of the measures for the market – e.g. quality, shelf life, cost of compliance, etc.**
2.7 a	How will the proposed phytosanitary measures affect the commercial viability of the commodity, including impacts on quality, shelf life, and compliance costs? (250 words or less)
2.8	**Potential for replicating market access in other markets**
2.8 a	Will access to this particular market create a precedent for replication in other markets? ☐ Yes ☐ No If yes, please provide details (250 words or less).
4.	**Industry analysis: assess industry support for the market access request**
4.2	**The extent of support in the industry**
4.2 a	Does support for prioritising this application exist across the industry? ☐ Yes ☐ No Please reference the industry representative bodies and a broad cross-section of growers (250 words or less).
4.2 b	Does any opposition to this application exist across the industry? ☐ Yes ☐ No If yes, please provide details (250 words or less).
NA	Please provide any other statements or relevant information in support of your application that has not been addressed here (250 words or less).

Appendix C

Evaluation table

This document outlines the criteria used to assess applications for eligibility and alignment. Applications scoring below 50% of the maximum available score, or meeting the STOP criterion, will be returned to the applicant for refinement and discussion. Applications that meet preliminary screening requirements will be tabled at the next IMAAP meeting.

CRITERION	POINTS	VERBAL SCALE	STOP POINT *
1. Economic analysis: assessment of a significant and sustainable economic return from trade once established			
1.1 Credibility and robustness of the supply/demand analysis and business plan within the industry's Export Strategy	3	The economic case is backed by solid data and sound analysis	
	2	Data are robust, but the analysis is incomplete or unsound	
	1	The case is superficially sound but requires better evidence	
	0	No confidence in the case	STOP criterion
1.2 Contribution ($) of new trade to the Australian economy – the size of the market and the potential for Australia to secure a share of it relative to current horticultural exports ($3 billion for all crops)	3	New annual exports worth over 5% of total horticultural production ($150M)	
	2	2-5% ($60M-$150M)	
	1	0.3-2% ($9M-$60M)	
	0	less than 0.3% (<$9M)	
1.3 Export contribution (% of production) to the commodity	3	New exports over 10% of production	
	2	6-10% of production	
	1	1-5% of production	
	0	less than 1% of production	
1.4 Accessibility of the market across the industry – the proportion of producers	3	Over 50% of producers could access the market	
	2	31-50% of producers	
	1	10-30% of producers	
	0	Below 10% of producers	

* STOP criterion - The request does not qualify for prioritisation

1.5 Alternatives for market expansion by the industry	3	The industry has no other existing export markets, and this is its only opportunity	
	2	The industry has no other existing export markets, and this is one of several opportunities	
	1	The industry has existing export markets that could be expanded	
	0	The industry could expand substantially in the domestic market	
2. Technical analysis: assesses the ability to overcome technical barriers to trade (phytosanitary)			
2.1 Clarity of the request, in terms of the commodity and trade, pests of concern, and preferred measures	1	The request clearly states all required information	
	0	The request lacks key information or is ambiguous	STOP criterion
2.2 Ability to meet market phytosanitary requirements	3	Full data sets are held that are known to meet the market's requirements	
	2	Full data sets are held, but the market's acceptance of them is uncertain	
	1	Market acceptance of the data is unlikely	
	0	Data are clearly insufficient	STOP criterion
2.3 Existence of international standards that would facilitate negotiation	3	The international framework is well established and is accepted by the market in similar protocols	
	2	There are clear precedents in other markets but not in the target market	
	1	There are only limited precedents internationally or in the market	
	0	There are no precedents for the proposal	

2.4 Market access feasibility assessment	3	The market NPPO* can form and implement an agreement simply	
	2	The acceptance and implementation process is drawn out but clear	
	1	Acceptance and implementation face substantial barriers and uncertainty, but it is possible	
	0	There is minimal likelihood of agreement and/or implementation	STOP criterion
2.5 Expectation of market willingness to engage	3	High engagement is expected, and the political scenario is favourable	
	2	Engagement is uncertain but possible, and the political scenario is favourable	
	1	Engagement and/or political scenario is uncertain	
	0	Market engagement is unlikely, and/or the political scenario is not favourable	
2.6 Industry and supply chain ability to implement the measures and comply with expected protocol	2	The new trade will fit readily into existing systems and supply chains	
	1	Significant work is required to establish protocols and supply chains	
	0	Major work and cost will be required for the industry and the supply chain, which threatens the viability	
	0	Major concerns exist for the viability of implementing the measures or establishing the supply chain	STOP criterion
2.7 Viability of the measures for the market – e.g. quality, shelf life, cost of compliance, etc.	3	Quality is not affected, and the cost is within budget	
	2	Quality requires high care to avoid significant losses	
	1	Even with high care, losses will be regular and substantial against the benefit	
	0	Quality losses and costs of compliance make viable trade unlikely	STOP criterion

* NPPO: National Plant Protection Organisation

2.8 Potential for replicating market access in other markets	1	Achieving access will enhance the chance of access for requests for this and other commodities in this and other markets	
	0	This request will not create a precedent	
3. Market analysis: assesses the feasibility of establishing sustainable trade regarding production, supply chain, and marketing			
3.1 Evidence of market interest in the Australian product (competitive advantage)	3	The market has made clear requests for the commodity, consistent with the industry's Export Strategy	
	2	The market is demonstrably receptive to the commodity, but substantial work is needed	
	1	The market has substantial competition, but a significant market share is achievable	
	0	Significant market share is unlikely to be achievable	STOP criterion
3.2 Industry capacity to meet demand in terms of available production	3	The industry has full capacity to supply the commodity of the required quality and quantity	
	2	The industry has well-founded plans to expand to meet new demand in all years	
	1	The industry could meet new demand in most years	
	0	New demand is unlikely to be met in most years	STOP criterion
3.3 Industry experience with export under similar parameters	3	Significant existing exports with similar parameters	
	2	Significant existing exports with different parameters, but adaptation is achievable	
	1	Limited existing export experience, but strong plans for the establishment	
	0	Limited existing export experience and inadequate evidence of capability	STOP criterion

4. Industry analysis: assesses industry support for the market access request			
4.1 Priority for the industry, as expressed in its Export Strategy	2	The request is the first priority in the Export Strategy	
	1	The request is a high priority but not the first	
	0	The industry has not developed an export strategy	STOP criterion
4.2 The extent of support in the industry	2	The industry has consulted widely and is fully supportive	
	1	The industry has consulted widely and has strong support but some opposition	
	0	The industry is significantly divided on the prioritisation of this request	
	0	The request has limited support and strong opposition across the industry	STOP criterion
4.3 Evidence in the business plan for commitment to a sustainable trade	3	The business plan has a strong commitment from numerous industry stakeholders at all points of the supply chain	
	2	The business plan is solid, but extensive commitment still needs to be secured	
	1	Weakness of commitment in some areas creates concerns about sustainability	
	0	Lack of commitment makes sustainable trade unlikely	STOP criterion
Total	**50**		

The Panel may modify the assessment criteria to meet evolving needs in consultation with the department. Updated documentation will be available on the Hort Innovation website.

Appendix D

Terms of Reference

International Market Access Assessment Panel

1. Introduction

The International Market Access Assessment Panel (IMAAP; the Panel) is an advisory mechanism facilitated by Horticulture Innovation Australia (Hort Innovation) as a service to industry and the Australian Government. The Panel provides the Department of Agriculture, Fisheries and Forestry (the Department; DAFF) with transparent, consistent and merit-based advice on the assessment of market access applications for Australian horticulture. This advice supports the progression of nationally supported and technically robust applications for DAFF's consideration.
As such, IMAAP enables Horticulture Innovation Australia (Hort Innovation) to fulfil its obligations under its constitution to provide advice to the Department about new and improved technical market access considerations.

The Panel assesses applications against predefined criteria set out in the IMAAP Handbook, including broad national industry support, technical feasibility, export readiness and verifiable market potential.

Applications endorsed through IMAAP are unranked and are provided to the Department for consideration. Endorsed applications are recorded in the relevant country-specific pool documentation.

Neither the Panel nor Hort Innovation is responsible for the country-specific pool.

2. Function of the Panel

The Panel will review applications for technical market access and market access improvement against pre-defined assessment criteria. The Panel evaluates each application on its individual merit to determine whether:

1. The data meeting phytosanitary and/or other relevant technical requirements has been developed, is available and meets the Department's expectations (see FAQs on Hort Innovation website about DAFF's expectations for robust data).
2. Broadly Supported and Inclusive: The submission is broadly supported by growers, exporters, industry bodies, states and territories, and recognised as a priority in, for example, the industry's export strategy, and the opportunity is available to most growers/producers and does not unduly exclude areas based on, for example, regional limitations.
3. Market potential is verifiable: Evidence-based analysis used to support justification of the market access request and its anticipated market potential, including factors such as export value, consumer interest, size of market in target country, and cost to domestic market to realise the opportunity.
4. Export Ready: Industry (including growers and exporters) can meet the operational requirements related to preparing goods for export. Any issues concerning the ability to meet

requirements are, or can be, addressed and there is clear industry commitment and capacity to export.

5. Technically competent: Industry can meet the technical requirements of the importing country, such as provision of efficacy data for end point treatments, evidence of pest freedom, phytosanitary measures and maximum residue limits (MRLs).
6. Clearly defined export pathway: A clear technical and operational position is available to support the preferred export pathway and meet proposed import conditions, taking into consideration the varying degrees of detail required for each trading partner.

The Panel's assessment informs decisions on whether an application is suitable for endorsement into a relevant country-specific pool. This concludes the Panel's responsibilities in the market access pipeline.

Endorsed applications are not ranked and proceed to DAFF for prioritisation in accordance with DAFF's principles and criteria.

The Panel may also provide advice to Hort Innovation on cross-commodity and/or country-specific considerations, as well as emerging trade issues relevant to its remit.

3. Scope

3.1 In scope

The Panel's scope includes:

- Assessment of **new market access** and **market improvement** applications for Australian horticultural products;
- Consideration of applications across all market types, including:
  - open or closed markets;
  - new or existing markets; and
  - phytosanitary and non-phytosanitary market access issues;
- Evaluation of applications against predefined criteria, including:
  - broad national industry support and inclusion;
  - technical feasibility and availability of supporting data;
  - industry export readiness; and
  - verifiable and sustainable market potential;
- Endorsement of suitable applications for inclusion in an eligible country-specific pool;
- Provision of constructive feedback to applicants, where appropriate, to improve the quality and robustness of applications;
- Provision of advice to Hort Innovation on cross-commodity or cross-country considerations and emerging trade issues.

3.2 Out of scope

The Panel does **not**:

- Prioritise, rank or select applications for negotiation;

- Negotiate with importing countries or foreign authorities;
- Progress, manage or remove applications once endorsed into a pool;
- Have responsibility for the country-specific pool; nor
- Determine DAFF timeframes, resourcing or negotiation priorities.

4. Role

Specifically, the Panel will assess market access applications to ensure that:

- Market access/improvement impediments are clearly identified;
- Applications meet the requirements set out in the IMAAP Handbook;
- Applications align with the Department's national prioritisation principles and criteria;
- Alignment of applications with the industry's Export Strategy; and
- There is evidence of appropriate Australian Government support pursuing the requested market access.

5. Management of the Panel

The Panel will be an advisory mechanism of Hort Innovation, with individual members appointed by Hort Innovation. The Panel will be facilitated by Hort Innovation's Head of Export (the Facilitator) or a designated member of Hort Innovation's Trade team, and moderated by a Chair or a Deputy Chair appointed by the Hort Innovation Board of Directors.

It will be a function of the Facilitator to ensure the Panel operates within a transparent governance framework.

The Panel will meet at least twice annually, with additional meetings scheduled where deemed necessary by Hort Innovation.

6. Panel membership

The Panel comprises of four skills-based representatives, who will be appointed by Hort Innovation based upon their expertise in the horticulture and export sectors. The Panel will be mediated by a Chair or a Deputy Chair, both members of the Hort Innovation Board of Directors. Consideration will be given to ensuring an appropriate skills mix. Proxies or alternates will not be accepted.

Appointees will need to demonstrate a capacity to work in a collegiate manner for the wider horticultural good. Additional specialist knowledge or expertise may be invited to a Panel meeting, at Hort Innovation's discretion, to address specific issues under consideration.

The skill set to be represented on the Panel will include:

- Sectoral experience
    - Relevant qualifications and experience in the agricultural export sector;
- Technical skills
    - An understanding of technical barriers to trade in export markets;
    - Familiarity with sanitary and phytosanitary (SPS) issues and plant quarantine;

  - Growing, packing and exporting agricultural produce;
  - International trade policy formulation, including tariffs, quotas and trade analysis.

Proxies or alternates are not permitted. Panel members must demonstrate an ability to act in a collegiate manner for the benefit of the broader horticulture industry.

Additional specialist expertise may be invited to attend Panel meetings at Hort Innovation's discretion to address specific matters under consideration.

7.Observers and Advisors

The Panel may also include one non-voting observer/advisor from each of the following organisations:

- Department of Agriculture, Fisheries and Forestry (the Department)
- Department of Foreign Affairs and Trade (DFAT)
- Deputy Chair, when the Panel is moderated by the Chair.

With the agreement of the Facilitator, other observers/advisors may be present to address subject matter under consideration.

8. Decision making and Voting rights

Consensus decisions will be taken by the Panel wherever possible. If consensus cannot be achieved, decisions made by the Panel will be made by majority vote. Each Panel member, excluding observers, will have full equal voting rights. In the event of a tied vote, the Chair will have a casting vote.

A quorum of at least three members, plus the Chair will be required to constitute a formal Panel meeting.

Observers/advisors will have the opportunity to engage in discussion around matters under consideration but will not have voting rights.

9. Confidentiality and agri-political refrain

Panel members will be required to sign a confidentiality agreement given the nature of material likely to be presented to them as part of a market access application. All commercial and trade-in-confidence material contained in market access applications is to be considered as sensitive and must not be distributed or discussed outside of the Panel's deliberations or other formal requirements of the Panel. Panel members must maintain confidentiality regarding material provided and discussions held during the Panel's activities.

Information presented to the Panel may be commercial-in-confidence, government-in-confidence, or otherwise open. The nature of the information presented will be clearly advised by the Facilitator. Any breach of this confidentiality will fall under unacceptable norms of business behaviour.

A standard Hort Innovation commitment to refrain from agri-political comment is required to be signed and returned to Hort Innovation before nominees can join the Panel. This acknowledges the member's consent to refrain from commenting on trade matters from a Panel-member perspective for the duration of their tenure as a panel member. Comment on trade matters from a non-Panel member perspective is not restricted.

Panel members must immediately advise the Chair and the Facilitator if they have a commercial or other conflict of interest in any topic under consideration by the Panel.

10. Term of the Panel's membership

Appointments to the Panel, including Chair and Deputy Chair roles, are made annually. There is no maximum number of terms.
Panel membership will be reviewed at least biennially or as otherwise determined by Hort Innovation.

11. Panel funding

The activities of the Panel are funded by industry through Hort Innovation.

Funding may include travel, accommodation and meal costs relating to Panel members' attendance at meetings.

12. Handling of proposals

The principal activity of the Panel is the assessment of market access applications to determine whether applications are complete, robust and suitable for endorsement.
Panel recommendations, decisions and supporting rationale are recorded and made available to applicants. Hort Innovation is responsible for communicating outcomes to applicants, industry and DAFF.

13. Applications for market access/improvement

Parties submitting applications for establishment of market access/improvement may be individuals or groups consisting of individual producers, exporters or others in the supply chain. If not an industry body, applicants must liaise with and demonstrate support from the appropriate representative body prior to lodging their application, in alignment with the principles detailed in section 2.

14. Communication of outcomes

Upon approval by the Facilitator, minutes and relevant attachments will be distributed to all Panel members. This function will be the responsibility of Hort Innovation.

Hort Innovation is responsible for ensuring that the applicant is advised of the Panel's decision. Hort Innovation will support communication of Panel activities to growers, exporters and other stakeholders.

Communications may include Hort Innovation newsletters, website, and direct circulars to industry distribution lists.

The Facilitator is responsible for communicating the Panel's advice to Hort Innovation, industry or the Department, as appropriate.

Panel members do not communicate Panel outcomes publicly in their capacity as Panel members.

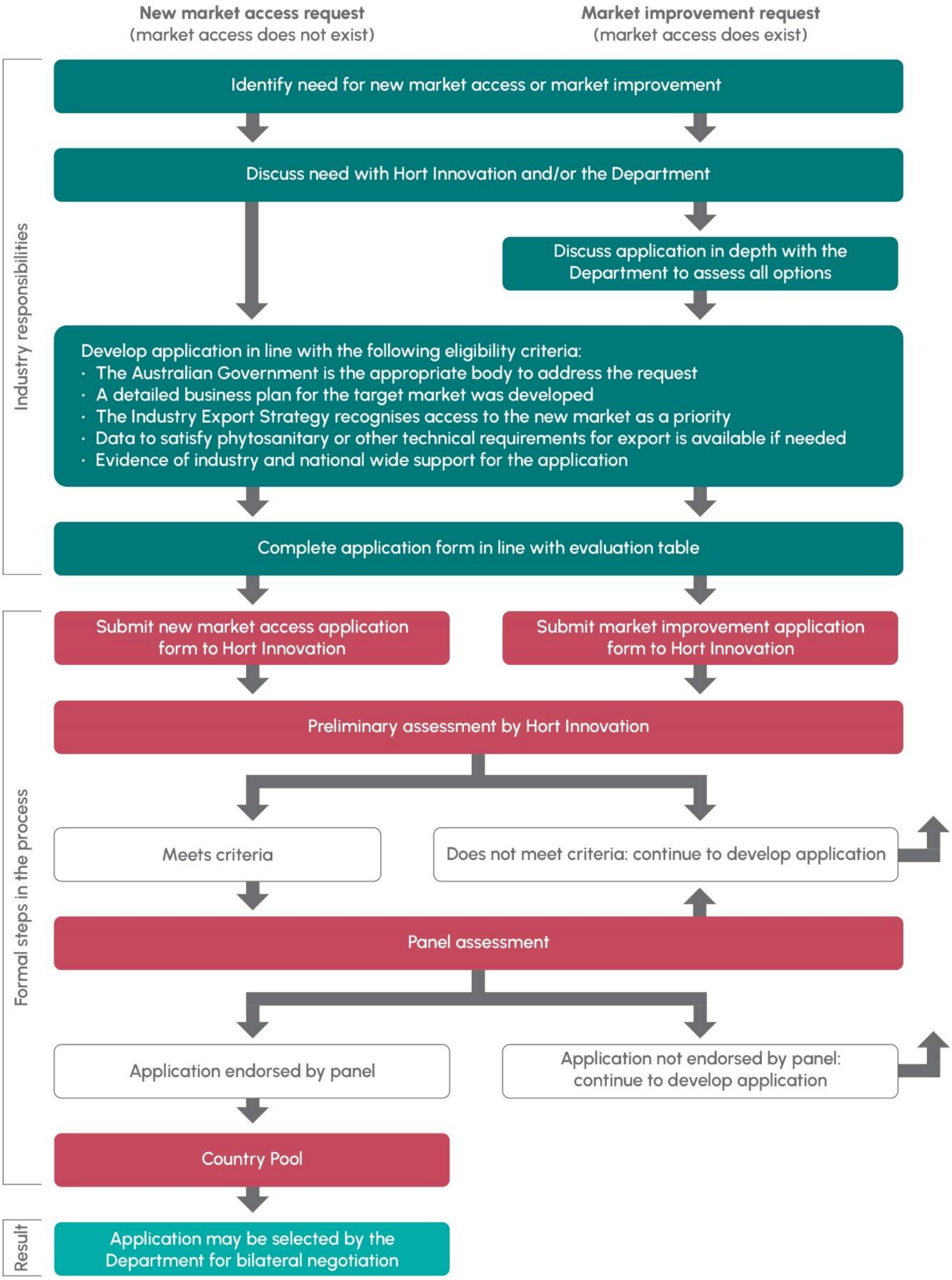
15. Dispute resolution

The Facilitator will adjudicate on any matter(s) requiring resolution, which cannot be resolved within the Panel by the Chair.

	Version	Date	Description	Approved by
1	2026 v 1	30 April 2026	Final version	The Hort Innovation Board

Appendix E

Application process



Appendix F

Australian Government
Department of Agriculture, Fisheries and Forestry

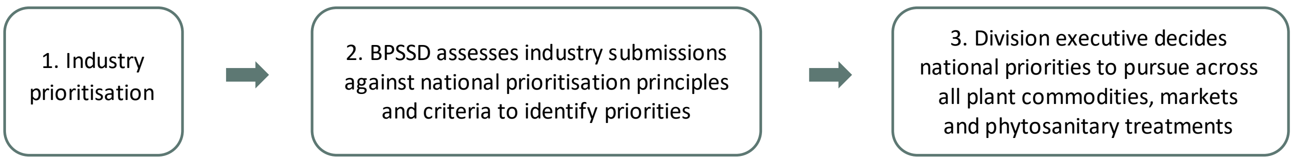
The department's plant market access prioritisation

Plant market access prioritisation – Process and principles

The Department of Agriculture, Fisheries and Forestry (the department) works to obtain new and improved market access, as well as maintain existing access for Australian agricultural exports. The Biosecurity Plant and Science Services Division (BPSSD) achieves this through market access negotiations with trading partners to facilitate greater export opportunities for Australian grain, horticulture, timber and plant material producers.

In accordance with global trade rules, importing countries require Australia to demonstrate how proposed export pathways manage pest and disease risks. BPSSD develops evidence-based technical submissions, which are used during negotiations to show how Australian exports meet the biosecurity requirements of trading partners.

Negotiations with trading partners can be technically complex, resource intensive and take time to achieve trade outcomes. As such, the BPSSD must prioritise which market access requests to pursue, to ensure effort is directed towards activities most likely to advance Australia's agricultural trade objectives. The process and principles used by the BPSSD to identify and determine priority market access activities are outlined below. This process applies to requests for horticulture new market access and improvements to existing market access. It does not apply to market maintenance activities, which BPSSD undertakes as necessary.



Prioritisation process

1. Hort Innovation provide the department with approved industry submissions for respective commodities to particular export markets
    - For horticultural commodities, this process is via the Hort Innovation International Market Access Assessment Panel (IMAAP). Non levy-paying horticultural industries can also use the IMAAP process.

2. The department assesses approved industry submissions against National Prioritisation Principles and Criteria (see Table 1 below) to identify export market priorities.

   - The department considers all approved industry submissions and additional information from across the Department, the agriculture counsellor network, trading partners, and other government Departments (both state/territory and federal).
3. The department recommends preferred export market priorities to executive staff through the internal Market Access Risk Analysis (MARA) Governance Board for consideration and a final decision.

The department must determine which new market access and improvement requests to pursue across all plant commodities, international markets and phytosanitary treatments. To maximise industry gains as a whole, resources and effort are aligned with national and agriculture trade objectives and priorities.

The department reviews agreed export market priorities. Unresolved technical issues can arise from changes in importing country's biosecurity requirements, changes in Australia's pest and disease status, and evolution of international phytosanitary standards. The department may need to re-examine particular market access requests and reprioritise activities accordingly. This is done in consultation with the relevant domestic industry and trading partner.

Table 1: National prioritisation principles and criteria

Principles
1. Take into account Australia's **national interest,** including alignment with broader Australian Government interests and the national trade policy agenda (portfolio priorities and overall bilateral relationship).
2. Meet **the Department's strategic objective** to assist industry to grow to a $100 billion agriculture sector by 2030.
3. Deliver **tangible benefits** that add value to the Australian community.
4. **Challenges** or barriers that could inhibit Australia's market access and trade potential have been identified and action taken to resolve.
5. Take into account **practical considerations** that could impede the successful negotiation of the market access request, including resourcing.

Criteria	Meaning
1. Broadly supported	The submission is broadly supported by growers, exporters, industry bodies, states and territories, and recognised as a priority in, for example, the industry's export strategy.
2. Inclusive	The opportunity is available to the majority of growers/producers and does not unduly exclude areas based on, for example, regional limitations.
3. Market potential is verifiable	Evidence-based analysis used to support justification of the market access request and its anticipated market potential, including factors such as export value, consumer interest, size of market in target country, and cost to domestic market to realise the opportunity.
4. Export ready	Industry (including growers and exporters) are able to meet the operational requirements related to preparing goods for export. Any issues concerning the ability to meet requirements are, or can be, addressed and there is clear industry commitment and capacity to export.

5. Technically competent	Industry are able to meet the technical requirements of the importing country, such as provision of efficacy data for end point treatments, evidence of pest freedom, phytosanitary measures and maximum residue limits (MRLs).
6. Clearly defined Export pathway	A clear technical and operational position is available to support the preferred export pathway and meet proposed import conditions, taking into consideration the varying degrees of detail required for each trading partner.