

Final report

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Dried Grapes Export Strategy

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Public summary

Australian dried grape exports face increasing competitive pressure, changing market dynamics and the need to capture greater value from expected production growth. This project developed a practical export strategy to guide industry investment and improve the long-term competitiveness of Australian dried grape exports.

During this reporting period, the project was completed through a comprehensive program of market analysis, stakeholder consultation and strategy development. The project included extensive desktop research across global trade flows, priority markets, competitor countries, consumer and channel trends, market access requirements and Australia's competitive position.

Stakeholder engagement formed a central component of the project, including interviews with growers, processors, exporters, industry representatives and government stakeholders, followed by an industry workshop to test findings, validate priorities, and refine strategic directions.

These activities informed development of the Australian Dried Grapes Export Strategy 2026–2030, which identifies priority export markets, target customer segments, strategic positioning, capability requirements and a phased implementation roadmap. The strategy also outlines shared investment priorities and governance arrangements to support coordinated industry delivery.

The project has successfully delivered an evidence-based, industry-informed export strategy that provides a clear framework for growing export value through premium market positioning, stronger customer relationships and coordinated industry investment.

Achievements

Table 1. Achievements

Achievement criteria	Delivery partner assessment: • Achieved • Partially achieved • Not achieved	Justification
Completion of market analysis	Achieved	Comprehensive analysis completed covering global trade, market attractiveness, competitor benchmarking, consumer and channel trends, pricing, market access requirements and Australia's competitive position.
Completion of stakeholder engagement	Achieved	Extensive stakeholder consultation completed, including interviews across industry and an industry workshop used to validate findings, priorities and strategic initiatives.
Development of Australian Dried Grapes Export Strategy 2026–2030	Achieved	A comprehensive export strategy was developed, reviewed with stakeholders and finalised. The strategy includes market prioritisation, strategic positioning, implementation initiatives, governance arrangements and a five-year roadmap.

Outputs

Table 2. Output summary

Output	Listed in M&E Plan: • Yes • No	Description	Evidence and data
Comprehensive market analysis	Yes	Analysis of international trade, market attractiveness, competitor countries, pricing, consumer trends, channels, and market access requirements.	Completed research across priority markets using international trade data, desktop research and market analysis.
Stakeholder consultation	Yes	Interviews and consultation across growers, processors, exporters, industry organisations and government stakeholders.	Stakeholder interviews completed and findings incorporated into strategy development.
Industry workshop	Yes	Facilitated workshop to validate market priorities, competitive positioning, and strategic initiatives.	Workshop successfully delivered with industry participation and outputs incorporated into the final strategy.
Australian Dried Grapes Export Strategy 2026–2030	Yes	Comprehensive export strategy including market assessment, strategic priorities, implementation roadmap and investment recommendations.	Final strategy completed and submitted to Hort Innovation.
Implementation roadmap	Yes	Five-year roadmap outlining sequencing of initiatives, governance, and investment priorities.	Included within the final export strategy.
Monitoring and evaluation framework	Yes	Measures to support implementation and evaluation of the strategy over time.	Included within the final strategy.

Outcomes

Table 3. Outcome summary

Outcome as listed in M&E Plan	Progress to achieving outcome	Evidence and data	Progress: • On track • Off track
Shared view of priority markets	Industry consensus established through evidence-based analysis and stakeholder consultation.	Priority market framework validated through stakeholder interviews and workshop.	Achieved
Clear export strategy for the industry	Australian Dried Grapes Export Strategy completed.	Final strategy provides market prioritisation, positioning, initiatives, and implementation roadmap.	Achieved
Identified capability needs to support export growth	Capability gaps and enabling investments identified.	Strategy includes capability-building initiatives, shared investment opportunities and governance recommendations.	Achieved
Improved coordination and alignment across industry	Project brought together key industry participants to develop a shared direction for export development.	Consultation process and workshop resulted in broad alignment around priorities and implementation approach.	Achieved

Refereed scientific publications

Not applicable

Intellectual property

No project intellectual property or commercialisation outcomes were generated through this project. All project deliverables have been provided to Hort Innovation in accordance with the project agreement.

Issues and risks

No significant issues or risks affected project delivery.

Minor refinements to the strategy were made following stakeholder review to strengthen competitive landscape, market prioritisation and implementation sequencing.

As identified through stakeholder review of the final strategy, successful implementation will require a disciplined focus on a small number of high-priority markets and initiatives. While the strategy identifies industry priorities, the Australian dried grape industry has limited resources and investment capacity. Achieving meaningful outcomes will therefore depend on prioritising activities with the greatest potential return, maintaining alignment across industry stakeholders, and securing sufficient investment to support implementation over the life of the strategy.

Other information

The project was completed in accordance with the agreed scope and methodology. The final strategy reflects independent market research, international trade analysis and extensive consultation across the Australian dried grape industry. The strategy provides a practical framework to guide future industry investment and export development activities over the 2026–2030 period.

Appendices

Australian Dried Grapes Export Strategy 2026–2030