

# Shaping the future of horticulture investment

**Strategic Horticulture Investment Framework (SHIFt) consultation insights report**



September 2025

**Hort  
Innovation**

# Contents

<b>Message from the CEO</b>	<b>1</b>
<b>Australia's horticulture sector</b>	<b>2</b>
<b>Introduction</b>	<b>3</b>
<b>Consultation</b>	<b>4</b>
<b>Summary of consultation findings</b>	<b>6</b>
<b>Next steps</b>	<b>9</b>
<b>Other feedback</b>	<b>10</b>
<b>About Hort Innovation</b>	<b>10</b>

## Acknowledgements

Hort Innovation acknowledges the traditional custodians of the lands on which we work and their enduring connection to Country. Inspired by their care for land and culture, we commit to fostering an industry that respects and values First Nations knowledge, traditions and contributions.

The SHIFt project team extends its gratitude to everyone across the country who gave their time to meet with our team members and discuss their invaluable insights and recommendations on a new investment framework. The discussions we had were incredibly beneficial and provided us with a wealth of information to consider.

## Message from the CEO

Australian horticulture is at a turning point. With the current Strategic Investment Plans wrapping up in mid 2026, we have a chance to take stock, listen carefully, and shape a better way forward – one that's practical, inclusive and built with growers at the centre.

The **Strategic Horticulture Investment Framework (SHIFt)** program is a first for Hort Innovation.

It's the most extensive national consultation we've ever run to co-design a new investment planning framework with industry. And it's been driven by what matters most to you. This isn't just a refresh – it's a step change. One that will be clearer, more flexible, and built to reflect the real-world needs of growers and industry.

Over the past nine months, more than 400 stakeholders – from growers and researchers to industry bodies and delivery partners – have shared their experiences, challenges and aspirations. You've told us what's working, what's not and how we can lift the value of every research and development (R&D) and marketing investment.

Your feedback has been clear: the future framework must be strategic, transparent and adaptable. It must reflect the diversity of our sector and be simple enough to use, yet robust enough to guide meaningful decisions.

This report captures the consultation insights gathered in Phase 1 of SHIFt. It's both a record of what we heard and a foundation for what comes next. From here, we'll continue to work with you to shape a model that's not only fit for purpose – but fit for the future.

Thank you to everyone who contributed their time, ideas and perspectives. Together, we're building a smarter, stronger and more connected horticulture industry.



Brett Fifield  
Chief Executive Officer, Hort Innovation

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## Australia's horticulture sector

**\$17B**

The total production value of the Australian horticulture sector in 2023/24.

**\$7.52B**

The growth in horticulture production value since 2012/13.

**19%**

The percentage of Australia's total agricultural production that is in horticulture.

**7 v 6**

The number of countries that Australia exported to in 2023/24, with the top five being China, Hong Kong, Japan, Vietnam and Indonesia.

**18%**

The percentage that production value increased for horticulture over the past five years.

**\$2.75B**

The total value of Australia's fresh horticulture exports in 2023/24.

**3rd largest**

Horticulture is the third largest agricultural sector in Australia.

## Introduction

The Strategic Horticulture Investment Framework (SHIFt) program is a Hort Innovation initiative aimed at transforming investment planning within the horticulture industry, ensuring that investments are strategically aligned with industry needs and priorities to foster innovation and growth across the sector.

Phase 1 of SHIFt focused on extensive consultation on the investment planning framework with more than 400 industry participants, including members of Strategic Investment Advisory Panels (SIAPs), chief executives, chairs and board members of Peak Industry Bodies (PIBs), independent growers, industry representatives, regional bodies, researchers and delivery partners.

The consultation process involved written submissions, semi-structured interviews and workshops, primarily seeking feedback on the [SHIFt Discussion Guide](#), while also addressing other emerging industry issues.

This paper presents the insights gathered from Phase 1 of SHIFt, highlighting the key themes and feedback gathered from our industry consultation. These insights have shaped a robust planning model designed to align with the strategic goals of the horticulture sector, with implementation set to begin in Q1 2026.



# Consultation

## You asked, we answered

Our consultation sought to understand what industry wants from an improved investment planning approach. This is what we heard:

- 1. Streamlined planning and standardised themes**
- 2. Stronger representation and input**
- 3. A flexible five-year planning model**
- 4. Solutions to grower problems**
- 5. Practical investment plans**
- 6. Strengthened governance, collaboration and accountability**



Consultation insights were also gathered from various industry events and formal written submissions:

### Key industry events

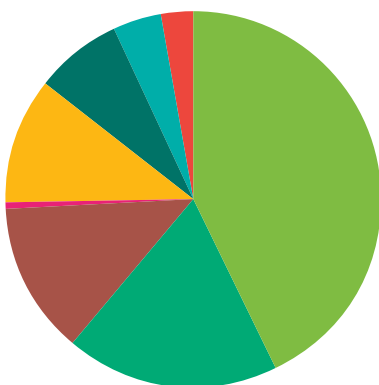
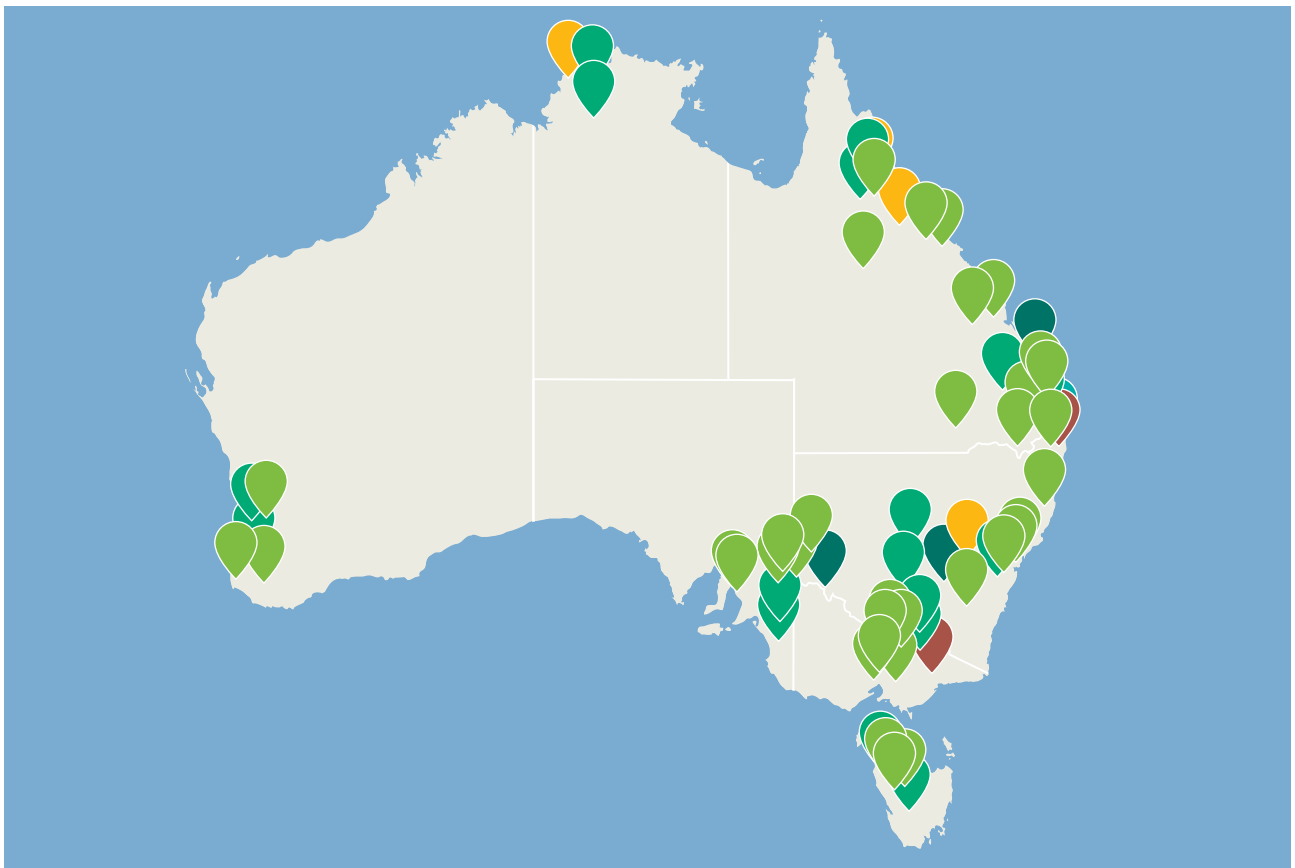
- BerryQuest, Hobart
- Citrus Congress, Griffith
- Greenlife Conference, Brisbane
- Northern Australia Future Foods, Darwin
- Hort Innovation Peak Industry Body forum, Brisbane

### Written submissions

- WA Department of Primary Industries and Regional Development (DPIRD)
- AUSVEG
- Potato Processors Association of Australia
- Citrus SA
- Potatoes Australia
- Macquarie University Smart Green Cities Research Centre, Which Plant Where
- Mr Ross Skinner

## Consultation continued

### Consultation reach



#### Primary roles

- Growers including grower panel members (190)
- Peak Industry Body CEOs or Chairs (40)
- Delivery partners (34)
- Industry service providers (23)
- Industry Development Officers (13)
- Other industry associations (8)
- Australian Fresh Produce Alliance (2)

# Summary of consultation findings

## The structure

### Prioritise strategic initiatives

Streamline and simplify current plans by identifying areas on which to focus finite levy funds to deliver the best outcomes for growers.

### Focus on key issues

Clearly show how funds are allocated and what's included in the strategy, with a strong focus on delivering value and results for growers.

### Recognise industry differences

Address the differences between small, medium and large industries. The plans need to consider specific industry objectives, as well as common industry needs.

### Enhance succession and representation

Introduce next generation thinking into the planning and ensure diverse, regionally representative advice for larger industries.

### Enable cross-industry review

Ensure that individual Industry SIPs have the same themes to allow for cross-industry review.

"It makes sense to cluster SIPs, e.g., tropical crops, to combine effort and maximise our levy investment, however, we still want to be able to see our industry specific priorities."

"There is a need for strong industry strategic planning if industry development is to be effectively progressed."

### Summary of consultation findings continued

#### The timeframe

##### Five-year planning horizon

Strong support for five-year planning, to better manage influences such as the trade and economic environment and the progression of technology use.

##### Planning flexibility for quick response

Support for annual check-ins and mid-term reviews, plus the ability to pivot plans as needed.

##### Blue-sky thinking

Encouraged forward-thinking with clear outcomes and goals.

##### Contingency plans

Allocate provision funds for emergency and short-term projects.

#### User needs

##### Straightforward investment plans

Create practical and clear investment plans with simple language and shorter formats.

##### Grower impact upfront

Focus on the problems and opportunities that matter most, such as profitability and growth, while being flexible around industry changes. Report against plans to demonstrate results.

##### Defined priorities

Improve and simplify priorities and align R&D support with industry strategic plans.

##### Effective engagement channels

Use successful industry events and meetings (such as the pineapple study groups) to identify and prioritise issues and communicate back to industry.

“Levy investment should be mainly focused on short-term investments, with some long-term projects e.g. tree architecture, whilst industry should be developing the long-term industry strategy out to 15 years, with steps on how to get there.”

“Need to encourage blue-sky thinking with clear outcomes and aspirations.”

“We want to see what other industries priorities are, learn from and validate, not repeat the research. Where it makes sense, collaborate.”

# Summary of consultation findings continued

## Governance

### Project management and accountability

Strengthen the connection between research outputs and industry outcomes, through structured forums and stakeholder engagement.

### Flexibility and transparency

Give growers more flexibility and transparency in levy spending and alignment of strategic priorities at both a state and national level, while addressing concerns about the marketing levies' ability to directly influence profitability.

### Stakeholder involvement

Ensure all stakeholders, from growers to IRBs and researchers, are involved in decision-making for more impactful investment outcomes.

### Strategic planning workshop

Hold facilitated strategic planning sessions to gather industry input and insights.

### Grower representation and challenges

Encourage more grower and regional representation on panels, boards and in strategic discussions to balance with consultant and PIB insights – acknowledging the challenges in recruiting committee members and maintaining regional structures.

### Balancing projects and reviews

Consider project trigger points that allow time for review before proceeding.

### Decision-making criteria

Clarify proposal evaluation process including flexibility for out-of-scope ideas and provide examples and clearer guidance on criteria.

### Transparency and communication

Call for more transparency in governance models and better communication with growers and ensure broad consultation to avoid plans and priorities being influenced by prominent voices.

### Cross-industry collaboration

Encourage cross-industry collaboration and develop investment plans in partnership between Hort Innovation and PIBs.

### Government contributions

Emphasise the role of governance in securing ongoing government matching funds.

### Regional partnerships

Address the lack of budget transparency in RFPs and strengthen SIAP/PIB/Hort Innovation's role in developing investment agendas and emphasise

"SIAPs should have greater visibility of active projects, with annual check-ins on how they are progressing – industry expects us to be across these and have the confidence that they will deliver an outcome as intended."

## Next steps

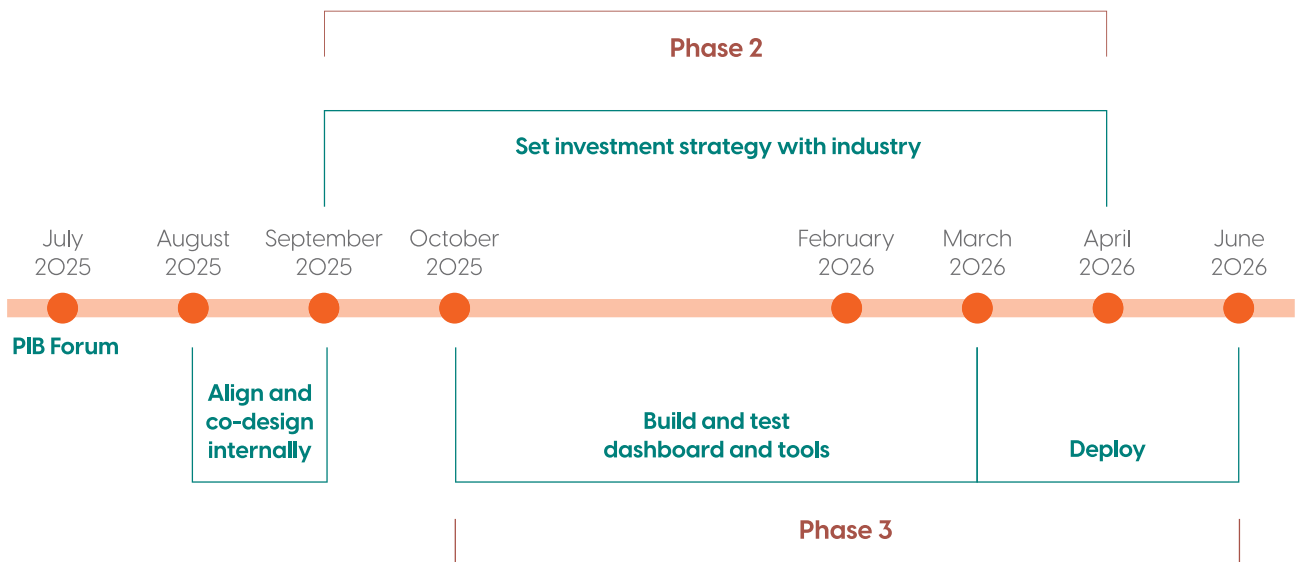
Understanding what our stakeholders want from strategic planning was an important first step, and we'll use the insights from this report to guide improvements to the strategic investment planning process.

Phase 2 of our industry consultation will build on this initial work, focusing on setting investment goals and investment priorities with PIBs and grower panels. There will also be broader grower consultation on challenges and opportunities, led by Hort Innovation industry service managers with support from industry bodies.

We will utilise the inputs from these communication channels to shape the goals and investment priorities, and growers will be invited to provide feedback and validate prior to formalising these priorities.

Hort Innovation will also develop internal systems and improve processes in preparation for the roll-out of the new investment plans.

### Build, test and launch new investment dashboard



## Other feedback

While the consultation process was designed to surface feedback on the SHIFt initiative, we also captured valuable feedback on communications, tender processes, project management, international partnerships, voluntary contribution models and broader industry issues including biosecurity threats and regulatory changes.

Although these insights were outside the scope of the SHIFt consultation, we have documented the feedback and will share it with the relevant Hort Innovation business units as part of our continuous improvement feedback loop.

## About Hort Innovation

At Hort Innovation, everything we do is built on our vision to [create a prosperous and sustainable Australian horticulture industry built on innovation](#).

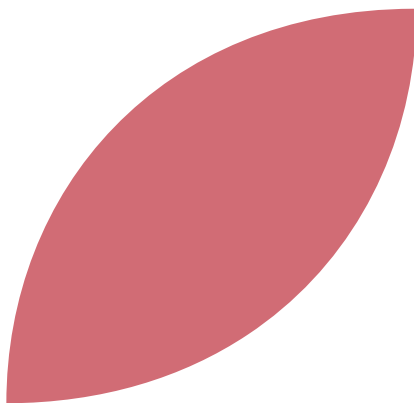
Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australia's horticulture industry.

Our role is to advance Australia's \$17 billion horticulture industry by investing in research and development, marketing and trade to build a prosperous and sustainable future for growers.

We partner with Australian and international co-investors including government, leading science, technology and consumer strategy experts to anticipate future challenges and opportunities.

Our role is to capture value from the investments we make to benefit all levy payers.

For more information, see the [Hort Innovation Strategy 2024-2026](#).



# Hort Innovation

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