Delivery partner resource

Horticulture Impact Assessment Program

TG20000 Impact Assessment

Hort Innovation

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TG20000 Table Grape market access and trade development

Executive Summary

The Australian table grape industry is a significant horticultural export sector, generating more than $700 million in annual production value and supporting approximately 400 corporate and family-run businesses across mainland Australia.[1] Maintaining and expanding access to international markets is critical to the industry's profitability, competitiveness, and long-term sustainability. Project TG20000 Table Grape Market Access and Trade Development was funded by Hort Innovation using table grape research and development levies and contributions from the Australian Government and delivered by the Australian Table Grape Association (ATGA) between 2021 and 2024.

The project aimed to strengthen and expand export opportunities for Australian table grapes through market access support, trade development activities, exporter capability building, industry engagement, and coordination with government agencies and international trading partners. Activities included export workshops, market intelligence dissemination, trade missions, compliance support, audit coordination, export registration management, and ongoing engagement with importing country regulators and Australian Government agencies.

This impact assessment examined the economic, environmental, and social impacts generated by the investment. The assessment identified a clear and measurable economic benefit arising from the expansion of varietal access to the Japanese market. Prior to late 2024, Australia could export only three table grape varieties to Japan. Following sustained industry engagement and market access activities, full varietal access was granted, enabling exports of more than 130 table grape varieties. This regulatory change was associated with a substantial increase in export volumes to Japan, rising from approximately 3,800 tonnes under the restricted access regime to around 9,500 tonnes following expanded access.[2]

Using a cost–benefit analysis framework, the incremental producer surplus generated from these additional exports was quantified over a 10-year benefit period. The analysis estimated a net present value (NPV) of $6.61 million, a benefit-cost ratio (BCR) of 4.88, an internal rate of return (IRR) of 43.1%, and a modified internal rate of return (MIRR) of 22.6% at a 5 per cent discount rate. Sensitivity testing demonstrated that the investment remained strongly positive under a range of alternative assumptions.

In addition to the quantified export benefit, the project generated several important unquantified benefits. These included:

— reduced exporter compliance and transaction costs through centralised coordination of export registration, audits, and inspections

— reduced risk of rejected consignments and associated food waste through improved compliance with importing country requirements and Maximum Residue Limits (MRLs)

— strengthened industry capability and resilience through training, market intelligence, and export readiness activities, and

— enhanced collaboration between growers, exporters, industry bodies, government agencies, and

[1] Hort Innovation, 2024, *Table Grape market access and trade development*.

[2] Australian Horticulture Statistics Handbook 2024-25; ATGA Export Statistics

international trading partners.

While these benefits were not monetised due to data limitations and attribution challenges, stakeholders consistently identified them as important contributors to industry performance and export competitiveness.

Overall, the assessment finds that TG20000 delivered substantial value to the Australian table grape industry by securing expanded market access to Japan, supporting export growth, strengthening industry capability, and maintaining Australia's reputation as a reliable supplier of premium table grapes across existing markets. The results highlight the importance of sustained investment in market access and trade development activities, particularly where outcomes depend on long-term government-to-government negotiations, industry-wide coordination, and collective action that individual firms would be unlikely to undertake independently.

Context, objective, and details of investment

The Australian table grape industry is comprised of around 400 corporate and family-run businesses, operating on 25,000 acres across mainland Australia.[3] In 2019, the annual production was approximately 230,000 tonnes, which was valued at over $700 million.[4] The industry has faced significant challenges, including the COVID-19 pandemic, seasonal labour shortages, environmental pressures, regulatory changes, rising production costs, limited availability of chemicals, vineyard health decline and unseasonal weather events. Despite this, the export value remained stable at $557 million from 2019 to 2023.[5] Most export come from Victoria, however the industry is evolving with producers in central Queensland and Western Australia starting to export as well.

TG20000 was funded by Hort Innovation, using the table grape research and development levy and contributions from the Australian Government. This project was undertaken to address critical needs within the industry. This included expanding market access, supporting the growth of export volumes, enhancing industry competitiveness and ensuring sustainability of the industry. Throughout the project, there has been immense support from the table grape industry, reflecting a strong expectation for the Australian Table Grape Association (ATGA) to continue its key role in market access, development, and promotional activities.

The project had the following objectives:

- boost export revenues to increase the value and volume of table grape exports, contributing to the economic stability and growth of the industry
- diversify markets to reduce dependency on traditional markets by identifying and penetrating new and emerging markets, thereby mitigating risks associated with market volatility
- enhance quality and standards to establish and maintain high-quality standards to meet international market requirements and consumer expectations
- support growers and exports by providing valuable support and resources to growers and exporters, enabling them to navigate the complexities of international trade
- strengthen industry collaboration by fostering collaboration between industry stakeholders, government agencies, and international trade bodies to streamline processes and address regulatory challenges
- promote innovation by encouraging the adoption of innovative practices and technologies to improve

[3] Hort Innovation, 2024, *Table Grape market access and trade development*.

[4] Ibid.

[5] Ibid

productivity, sustainability, and overall industry performance.

This project, through its strategic initiatives and objectives, has been instrumental in advancing the Australian table grape industry's global presence and ensuring its long-term viability and success.

Alignment with Strategic Investment Plan

Project TG20000 closely aligned with, and significantly contributed towards, the Table Grape Strategic Investment Plan (SIP) 2022-2026. The project aimed to maintain and refine the industry export strategy to support demand creation (Outcome 1). Further, the project strengthened productivity and sustainability through promoting innovative practices and technologies (Outcome 2). By using these innovative practices, the project supported Outcome 3 by building an innovative culture to support industry supply and demand. The project also provided market intelligence, export data and trade-related insights to growers (Outcome 4).

Overall, the project aligns with the outcomes of the Table Grapes SIP by the industry's export capabilities through strengthening export market access and trade development. It directly supports the SIP's goals to grow demand, build industry capability, and provide market insights that enhance the industry's competitiveness.

Table 1 Project details of TG20000

Project code	TG20000
Title	Table Grape market access and trade development
Research organisation(s)	Australian Table Grape Association
Project leader	Jeff Scott
Funding period	2021-2024
Objective	To strengthen and expand export opportunities for the Australian table grapes industry by providing market access support, trade development activities, and export capability building.

Source: Hort Innovation

Related investments

The project was linked with 7 other investments, these are:

- AM15002 – Serviced supply chains: Monitoring and modelling to improve the quality of Australian fresh product into Asian markets: this project improved supply chain practices to increase the consistency of fresh produce quality arriving into Asian markets. It identified critical handling risks and helped exporters adopt real-time monitoring so that fresh produce quality and shelf-life on arrival improved.
- AM19002 – Building capacity in irradiation – pathways for export: this project improved the acceptance and adoption of phytosanitary irradiation as a treatment method for fresh produce. The project increased knowledge and identified future research areas that will increase the use and acceptance of phytosanitary irradiation domestically and internationally.
- MT14052 – Essential market access data packages: this project was a multi-industry strategic levy investment that compiled data needed to support long-term international market access aspirations for multiple horticultural sectors.
- TG19000 – Extension of technologies and best management practices to the Australian table grape industry: this project ensured Australian table grape growers were informed about current research and

development activities, results, and resources. This supports the industry to adopt best practices and respond to challenges such as vine health, climate, and sustainability.

— TG19503 – Table grape export seminars industry engagement: this project involved trade seminars to educate imports, distributors and retailers on the Australian table grape industry. The seminars were crucial in providing an update on the upcoming harvest season in regards to volume, varieties and quality of fruit to expect from Australia. These seminars were influential in growing Australia's table grape exports.

— TG23000 – Table grapes market access and trade development project: this project is designed to secure and enhance market access for Australia's table grape industry. This involves export readiness, compliance, biosecurity and training for growers, aiming to mitigate risks while expanding export opportunities.

— TG17000 – Table grape export readiness and market access: this project continued industry work into market access and development. It provided industry advice in relation to exports and shared information including seasonal updates and data on shipping and market conditions.

Governance

The governance structure of TG20000 was designed to ensure strategic alignment, scientific integrity, and effective industry engagement. Hort Innovation provided oversight to ensure the project met its objectives and aligned with industry priorities. The project was funded by Hort Innovation, using the table grape research and development levy and contributions from the Australian Government.

The Australian Table Grape Association (ATGA) was the delivery partner, with Jeff Scott as the project lead. Using an organisation with deep export, market-access and compliance experience means the work is grounded in evidence-based knowledge. This project builds on the previous successful outcomes from projects serviced by ATGA, which were also led by Jeff Scott. A project reference group was established, consisting of Jeff Scott (the CEO), ATGA Chair, Hort Innovation, another grower and 2 exporters nominated by the Australian Horticulture Trade, previously Australian Horticultural Exporters' and Importers' Association (AHEIA). The project reference group provided input and feedback to continuously improve the project activities, monitor risks and work towards the objectives of the project.

Several governance documents and processes were established, including a monitoring evaluation plan, workplan, risk management plan and risk register, and a stakeholder engagement and communication plan. These resources provided the frameworks to deliver the project successfully and guide activities.

Additionally, the final report is publicly available via Hort Innovation, giving full visibility into methods, data, results and recommendations.

The governance structure is assessed as robust, with strong industry insights and transparent reporting.

Impact pathway

Table 2 Impact pathway of TG20000

Pathway	Description
Inputs and activities	**Project setup and governance** • Funded by Hort Innovation using industry levies • Project Reference Group (PRG) established to oversee the project's strategic direction and ensure alignment with industry goals • Annual work plans were developed to outline specific activities, timelines and responsibilities • Regular reporting, data collection and analysis

Pathway	Description
	• Risk management plan was developed to identify potential risks, assess their impact and implement mitigation strategies **Trade development and market access** • Efforts were made to maintain existing markets through regular engagement with imports, compliance with regulatory requirements and participation in trade shows **Extension of existing knowledge and industry engagement** • Stakeholder engagement and communication plan which included regular updates, newsletters and meetings to keep stakeholders informed and involved • 3 export workshop forums to educate growers and exporters • Extensive engagement across the horticulture export industry • Market intelligence reports, and articles were published three times a year over 3 years to disseminate valuable information to industry stakeholders. Newsletters were published fortnightly and 2 articles were published in the ATGA national magazine, The Vine.
Outputs	**Project planning, governance and reporting** • Exporter directory developed and maintained to provide a comprehensive list of certified exporters • Annual market access and trade development work plan • Six monthly reviews of the annual work plan **Extension, communication, and industry engagement** • Held 3 export workshop/forums in the major growing regions • Engagement and representation across the horticulture export industry with growers, Peak Industry Bodies and stakeholders • Presentations once per year at various forums and workshops • Engaged the Department of Agriculture, Fisheries and Forestry (DAFF) to provide up to date information on market access and development at regional forums • Contributed to 12 editions of the quarterly magazine The Vine through the table grape communications project • Input into fortnightly editions of the industry newsletter, *Pick of the Bunch* • ATGA social media used to notify the producer community and to extend the reach of TG20000 outputs • 10 videos produced in collaboration with TG18004 and TG22001 • Availability of information via the website • 1 outbound and 12 inbound trade missions to promote Australian table grapes and build relationships with international buyers • Strong relationships created with government officials, Agriculture Counsellors, and Australian embassy personnel • Trade show attendance under Taste Australia/Grown in Good Nature presence **Data and knowledge products** • Provided information to growers and exporters on overseas countries requirements for exports • Improved the dissemination of information on chemical use and Maximum Residue Limits (MRLs) compliance for exports to various countries to an average of 717 growers • Sourced and disseminated market intelligence reports from various countries • Online export registration and enhanced mapping development to streamline export registration • Fact sheets distributed at export forums and workshops Australia wide • Coordination of pre-shipment inspections and facility audits by international inspectors

Pathway	Description
Outcomes	**Higher exporter compliance with importing country requirements** • Improved grower and exporter understanding of phytosanitary and protocol requirements • Increased adherence to chemical and MRL standards reduces risk of non-compliance events • Improved audit preparedness supports continues market access **Improved export quality consistency** • More consistent application of export protocols across growers and packhouses • Reduced variability in documentation, inspection outcomes, and shipment preparation • Stronger confidence among importing country regulators and buyers **Lower compliance and transaction costs per exporter** • Streamlined export registration reduces administrative burden leading to a faster turnaround of export approvals and documentation • Improved coordination between industry and regulators reduces duplication and delays **Better exporter decision making using market intelligence** • Exporters use updated intelligence to inform variety selection and shipment timing • Improved alignment of exported varieties with market demand preferences aiding in reduced commercial risk through improved market awareness **Faster and more coordinated responses to market disruptions** • Established communication channels enable rapid dissemination of regulatory updates • Coordinated industry responses to compliance issues or inspection requirements • Strengthened collaboration between industry and government agencies **Expanded and diversified market access** • In late 2024, full varietal access to Japan was granted, enabling growers to supply the market with more than 130 table grape varieties[6] • Structural expansion of export opportunities from the 2025 season onwards enabling greater capacity to match Australian varietal supply with Japanese consumer demand
Impacts	• Expanded varietal access to Japan supports increased export volumes and higher export revenues. Additionally, greater varietal diversity reduced revenue constraints previously imposed by protocol limits • Reduced dependency on narrow product offerings strengthens market penetration and retention bolstering global competitiveness of Australian table grapes in premium markets • Industry wide coordination delivers trade outcomes that individual firms could not achieve alone • Improved compliance systems reduce likelihood of rejected consignments, contributing to lower food waste and resource loss • Sustained industry confidence through strengthened export systems and government engagement. Additionally, improved coordination across growers, exporters, and peak bodies enhances collective capability • Enhanced international relationships and strengthened reputation of Australian horticulture in key markets • Greater regional employment stability supported by stronger and more reliable export demand

Source: ACIL Allen

[6] ABC News. 2026. *Japan's demand for Australian table grapes drives export growth.* https://www.abc.net.au/news/2026-01-23/australian-table-grapes-export-to-japan-demand-rises/106237572

Cost and benefits

Costs

Cost of the investment

The project was funded by Hort Innovation. Hort Innovation contributed $1.3 million in cash and $0.2 million in overhead costs (ex-GST amounts). Table 3 below shows the total nominal cash contributions across the duration of the investment.

Table 3 Nominal costs of the investment by contributing partners of TG20000

Contribution	2020-21	2021-22	2022-23	2023-24	Total
Hort Innovation – Cash	$274,618	$423,854	$138,239	$472,923	**$1,309,634**
Hort Innovation – Overheads	$43,708	$67,112	$23,608	$81,147	**$215,576**
Total	**$318,326**	**$490,966**	**$161,847**	**$554,070**	**$1,525,210**

Source: Hort Innovation

The total nominal investment of $1.5 million is adjusted for inflation to represent the real value of the investment. Adjustment for inflation is meant to present historical costs in today's dollars by making periods comparable by converting nominal values to real values by way of adjusting for changes in purchasing power due to inflation.

Costs of the investment, in nominal terms and real terms, are provided in Table 4 below.

Table 4 Real costs of the investment TG20000

Organisation	Hort Innovation	Partner organisation	Total
Nominal costs	$1,525,210	$0	$1,525,210
Real costs ($2026 financial year)	$1,704,471	$0	$1,704,471

Source: ACIL Allen, modelled using ABS's implicit GDP deflator

Benefits

Table 5 below summarises the potential benefits of the investment and categorises them into 3 categories: economic, environmental and social impact. It provides a description of the benefits and how the investment could achieve them. The table also shows the assessment method that was used for each benefit.

Table 5 Summary of potential impacts of TG20000

Type of impact	Assessment	Description
Economic impact	Quantified	**Incremental export value from expanded varietal access to Japan –** Previously, Australia could export only 3 varieties of table grapes to Japan – Crimson Seedless, Red Globe, and Thompson Seedless. In late 2024, full varietal access to Japan was granted, enabling the export of over 130

Type of impact	Assessment	Description
		varieties.[7] This regulatory change followed sustained industry engagement and market access activities initiated under the project and represents one of its key achievements. This change resulted in a measurable increase in export volumes to Japan, with exports increasing from approximately 200 containers under the restricted trade regime to around 560 containers under expanded access conditions.[8] This benefit is estimated as the incremental net economic gain generated from additional exports enabled by expanded market access, rather than total export revenue. This incremental benefit is calculated as: *Additional exports attributable to expanded varietal access x average export value per container x gross margin associated with export x share attributable to TG20000* Put simply, this estimates the additional producer surplus generated by the increase in export volumes made possible through expanded varietal access, adjusted for the proportion attributable to TG20000. While not quantified, the project delivered benefits beyond the incremental export uplift associated with expanded varietal access to Japan. Through ongoing compliance support, market access maintenance, audit coordination, and industry engagement, the project also helped safeguard existing export trade across established markets. These maintenance and risk-reduction benefits have not been quantified in this assessment due to the absence of a credible counterfactual from which potential trade losses or disruptions could be reliably estimated.
	Unquantified	**Reduced exporter compliance and transaction costs** - The project supported ongoing maintenance of a centralised export registration, mapping, audit coordination and inspection system covering all exporting growers and pack houses (over 2,400 individual registrations annually). By providing a single coordination point between industry, DAFF and international inspectors, the project reduced duplication of effort, administrative burden, and time costs for exporters. Although the benefit is acknowledged by industry stakeholders, it is not possible to quantify since the system was developed prior to the commencement of TG20000. The project's role was primarily maintenance, coordination support, and incremental improvement, rather than creation of a new intervention. This makes it difficult to isolate a clear "with versus without project" counterfactual attributable solely to TG20000.
Environmental impact	Unquantified	**Reduced rejected consignments, food waste, and improved chemical stewardship –** The project contributed to improved exporter awareness and compliance with importing country requirements, including MRLs, alongside strengthened dissemination of chemical use and export

[7] ATGA. 2024. *Media release: Japanese consumers to get pick of the bunch of Aussie grapes.* https://australiangrapes.com.au/media-release-japanese-consumers-to-get-pick-of-the-bunch-of-aussie-grapes/

[8] Input from Jeff Scott. Australian Table Grapes Association.

Type of impact	Assessment	Description
		compliance information. These activities are expected to reduce the likelihood of rejected consignments and lower associated food waste. In the absence of any direct measurement of rejected consignments attributable to TG20000, it is not possible to quantify this benefit. Rejection events are often influenced by multiple overlapping factors, including grower practices, weather conditions, importer inspections, and broader regulatory settings, making it difficult to isolate the incremental effect of TG20000.
Social impact	Unquantified	**Improved industry resilience and export capability –** The project strengthened the export capability of growers and exporters through mandatory export forums, training on market access and compliance requirements, and regular dissemination of market intelligence. This improved preparedness and coordination during periods of disruption, supporting industry confidence and continuity. While these benefits contribute to industry welfare, they are difficult to quantify in monetary terms due to absence of observable counterfactual measures of "resilient" and the inability to isolate the incremental impact of training and coordination activities from broader industry adaptation, market conditions, and external shocks.
	Unquantified	**Enhanced industry coordination and knowledge continuity** – Ongoing representation on government and industry committees, coordination of trade missions, and dissemination of export information supported collaboration across the table grape industry and with government agencies. These activities generated public-good benefits by maintaining institutional knowledge and reducing reliance on individual firms, but are not readily quantifiable due to their long term nature and the lack of measurable indicators linking coordination activities directly to changes in commercial outcomes or avoided cost.

Source: ACIL Allen

Data and assumptions

The required data, assumptions and calculations used to estimate the impacts of the investment are presented in Table 6 below. The data were sourced from project data, external sources through literature review, industry data provided by Hort Innovation and other publicly available databases. Assumptions were informed by stakeholder consultations and are designed to be conservative considering the uncertainties underlying the magnitude of the impacts.

Table 6 Data, assumptions and calculations used for TG20000

Data/Assumption	Value, sources and rationale
Data	
Export volume to Japan in 2023-24 (under restricted market access)	3,819 tonnes Source: Australian Horticulture Statistics Handbook 2024-25 Freshlogic - Hort Stats FY25 V1.0 - Fruit (200226).pdf

Data/Assumption	Value, sources and rationale
Export volume to Japan in 2024-25 (under restricted market access)	9,495 tonnes Source: ATGA Export Statistics Export statistics - Australian Table Grape Association
Real farm gate price ($/kg)	$4.11/kg Source: ATGA Export Statistics Export statistics - Australian Table Grape Association
Gross margin associated with exports as a share of gross income	20% Source: Horticulture impact assessment program 2020-21 to 2022-23 (MT21015) mt21015-impact-assessment_tg17000.pdf
Assumption	
Attribution	Attribution to the project:32%, based on the nominal costs of the investment as a proportion to total nominal costs of related investments. While the cost share doesn't necessarily reflect the precise contribution of each project to the observed outcomes, it provides a transparent and proportionate basis for allocating benefits where multiple coordinated investments have contributed to expanded market access. Other contributing factors may include parallel non-Hort initiatives, broader industry engagement and background government to government negotiations. However, in the absence of a defensible alternative metric, proportional cost share is considered the most reasonable method for addressing attribution.
Counterfactual	In the absence of TG20000, it is unlikely that expanded varietal access to Japan would have been achieved within the same timeframe, given the need for sustained government negotiation, coordinated industry representation, and system-wide compliance assurance. These activities exhibit strong public-good characteristics and are unlikely to be undertaken by individual firms due to free-rider and coordination constraints. While ATGA receives strong industry support, this support is contingent on levy-funded coordination through Hort Innovation. The most plausible counterfactual is continued restriction to three varieties and lower export volumes.
Cost of adoption by growers and industries	Nil – cost of exports is considered within gross margin shares.
Duration of benefit	Expanded varietal access to Japan represents a structural and permanent regulatory change rather than a short-term market development effect. As such, incremental export benefits are assumed to persist over a 10-year horizon, reflecting the long production cycle of table grape vineyards and the durability of bilateral trade protocols. Sensitivity analysis tests shorter (7-year) and longer (15-year) benefit durations to account for commercial and market uncertainty.
Confidence	A confidence rating has been applied to the estimated benefit to reflect uncertainty around the duration of expanded market access benefits, future export volumes, and the extent to which current uptake is sustained over time. A 75% confidence level has been assumed in the central case, reflecting high confidence in the occurrence of the initial export uplift following varietal access expansion, but moderate uncertainty regarding the persistence of elevated volumes across the full modelling period due to potential changes in market conditions, production decisions, and international competition.
Calculation	
Incremental economic impact	*Additional export volume attributable to expanded varietal access x real farm gate price x gross margin associated with export x share attributable to TG20000*

Source: ACIL Allen

Net impact

A summary of the net impact of the investment is presented in Table 7 at 5% discount rate. The results show that, taking all quantified costs and benefits into account, the investment produced a positive net result. The investment has an NPV of $6.61 million and a BCR of 4.88 at 10 years after investment. The 10-year horizon reflects the long production cycle of table grape vineyards and the durability of bilateral trade protocols.

When taking only costs and benefits attributable to Hort Innovation into account, the investment generated an NPV of $6.61 million and a BCR of 4.88 at 10 years after investment completion. The benefits attributed to Hort Innovation were 100% since the project was funded solely by Hort Innovation.

Table 7 Net impact results of TG20000

	Years after investment completion		
	0	**5**	**10**
Whole investment			
PV of Costs ($m)	$1.70	$1.70	$1.70
Benefits ($m)	$0.00	$4.46	$10.03
PV of Benefits ($m)	$0.00	$4.15	$8.31
NPV ($m)	-$1.70	$2.44	$6.61
BCR	0.00	2.43	4.88
IRR	Negative	25.9%	43.1%
MIRR	Negative	19.8%	22.6%
Attributable to Hort Innovation			
PV of Costs ($m)	$1.70	$1.70	$1.70
Benefits ($m)	$0.00	$4.46	$10.03
PV of Benefits ($m)	$0.00	$4.15	$8.31
NPV ($m)	-$1.70	$2.44	$6.61
BCR	0.00	2.43	4.88
IRR	Negative	25.9%	43.1%
MIRR	Negative	19.8%	22.6%

Source: ACIL Allen

Sensitivity analysis

Sensitivity analysis was conducted to test the robustness of susceptibility of the analysis to key assumptions and parameters. Given the uncertainty of a number of assumptions used in this CBA, sensitivity testing is important to determine the appropriateness of underlying assumptions. The results of the sensitivity analysis are presented in Table 8 below.

Table 8 Sensitivity analysis results of TG20000 at 10-year horizon

	NPV (in $M)	BCR	IRR	MIRR
Under standard assumptions (Central case scenario and 5% discount rate)	$6.61	4.88	43.1%	22.6%
3% discount rate	$7.23	5.24	43.1%	22.6%
7% discount rate	$6.06	4.56	43.1%	22.6%
Higher gross margin as a share of gross income (25%)	$8.69	6.10	51.9%	25.6%
Higher attribution share (+10%)	$9.26	6.44	54.2%	26.4%
Lower attribution share (-10%)	$4.04	3.37	30.5%	17.6%

Source: ACIL Allen

Key findings

The following key findings have been identified for this assessment:

- **Expanded varietal access to Japan** generated a measurable increase in export volumes from approximately 3,800 tonnes under restricted access conditions to around 9,500 tonnes following full varietal approval. The quantified benefit reflects the incremental producer surplus associated with these additional exports. While early trade data supports the uplift, there remains uncertainty regarding the duration of elevated export volumes over the modelling period due to market dynamics, competition, and seasonal variability.
- **System-wide compliance coordination and export registration** were maintained through a centralised industry mechanism covering more than 2,400 annual registrations. This reduced duplication, administrative burden, and coordination costs relative to a counterfactual where exporters individually managed regulatory requirements. These efficiency gains represent real resource savings. However, quantification is constrained by the absence of baseline time-cost data and the difficulty of isolating incremental savings attributable solely to the project.
- **Reduced likelihood of rejected consignments and improved residue management** were supported through coordinated compliance, audit oversight, and strengthened alignment with importing country MRLs. While these activities reduce the probability of food waste and environmental costs associated with unsaleable exports, rejection events are infrequent and influenced by multiple external factors, making robust attribution and quantification inappropriate.
- **Strengthened industry coordination and market development capacity** were achieved through sustained engagement in priority markets and collaboration between industry, government and international stakeholders. These public-good outcomes underpin long-term export resilience and competitiveness. However, given their indirect and system-wide nature, they have not been monetised in the CBA.
- **Lessons learnt and opportunities for future investment –** The assessment highlights the importance of sustained, long-term investment in market access and trade development activities, particularly where outcomes depend on multi-year government-to-government negotiations and industry-wide coordination. A key limitation for impact assessment was the lack of systematic data on exporter compliance costs, rejected consignments, and the value of trade maintained through risk mitigation activities. Future investments could strengthen impact measurement by collecting baseline and longitudinal data on compliance costs, export disruptions, and market access outcomes, enabling a more comprehensive valuation of both growth and market maintenance benefits.

Consultations

The following stakeholders were consulted as part of this assessment:

— Mimi Doan, Hort Innovation

— Jeff Scott, Australian Table Grape Association

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