

Final Report

Table Grape market access and trade development

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Project code:

TG20000

Project:

Table Grape market access and trade development (TG20000)

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Funding statement:

This project has been funded by Hort Innovation, using the table grape research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

Publishing details:

Published and distributed by: Hort Innovation

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www.horticulture.com.au

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Contents

Public summary	4
Keywords	5
Introduction	6
Methodology	7
Results and discussion	8
Outputs	9
Outcomes	13
Monitoring and evaluation	15
Recommendations	23
Refereed scientific publications	24
References	24
Intellectual property	24
Acknowledgements	24
Appendices	25

Public summary

The Australian table grape industry comprises around 400 corporate and family-run entities cultivating table grapes on 25,000 acres across the mainland states and the Northern Territory. In 2019, the annual production was approximately 230,000 tonnes, valued at over \$700 million, which increased to \$918 million by 2023. Despite facing significant challenges, including the COVID-19 pandemic, seasonal labor shortages, environmental pressures, regulatory changes, rising production costs, limited availability of chemicals, vineyard health decline, and unseasonal weather events, the export value remained stable at \$557 million from 2019 to 2023. While most exports traditionally come from Victoria, the industry is evolving with producers in central Queensland and Western Australia starting to export as well.

During the life of these projects, there has been unwavering support from the table grape industry, reflecting a strong expectation for the Australian Table Grape Association (ATGA) to continue its pivotal role in market access, development, and promotional activities. This support underscores the industry's recognition of the significant value that ATGA's initiatives bring in terms of opening new markets, enhancing trade relationships, and driving the global competitiveness of Australian table grapes. The sustained backing from industry stakeholders highlights their commitment to collaborating with ATGA to overcome trade barriers, improve market penetration, and increase the visibility and appeal of Australian table grapes in international markets. Moving forward, the ATGA is poised to leverage this support to further its mission of advancing the industry's growth and securing its position as a leading player in the global table grape market.

Between July 2021 and May 2024, TG20000 delivered the following outputs in line with those primary objectives:

- Provided essential input into the maintenance of an industry Export Strategy focusing on market access, improvement, and development priorities.
- Contributed to market development programs in alignment with priorities identified in the table grape Export Strategy and the Strategic Investment Plans.
- Assisted in the development of training materials for a broad, multi-industry export training program that aligns with the Table Grape Export Strategy.
- Contributed to the creation and enhancement of Export Quality Standards to ensure the highest quality of exported table grapes.
- Facilitated logistics and providing assistance to growers for export registrations and supporting the DAFF's registration and audit of export facilities.
- Prepared and submitted business cases to the Trade Assessment Panel for new market access and market improvement, based on priorities identified in the Table Grape Export Strategy.
- Served as a point of expert industry advice for growers, exporters, and other stakeholders, including Hort Innovation, DAFF, and state agencies.
- Coordinated international inspectors to ensure compliance with export standards and protocols.
- Organised and managed logistics for inbound and outbound trade missions to promote Australian table grapes globally.
- Supported emergency industry consultation and response plan to address market disruptions or closures effectively
- Worked collaboratively with other horticulture sectors to share best practices and enhance overall industry performance.
- Ensured the continuity of knowledge within the industry to sustain growth and innovation.
- Contributed to articles for the national table grape magazine, The Vine, to disseminate valuable information and updates to industry stakeholders.
- Provided market intelligence on all facets of exports, including weekly updates on export statistics and detailed market reports from Chinese wet markets.

These strategic objectives demonstrate ATGA's commitment to supporting the table grape industry's expansion and resilience, ensuring Australian table grapes remain competitive and in demand in international markets.

Recommendations for future table grape market access and trade development programs include:

- Continuously review and improve Export Quality Standards to maintain and increase the competitiveness of Australian table grapes in international markets.
- Implement regular training sessions for growers and exporters on adhering to these standards.
- Increase the frequency and scope of market intelligence reports to cover more regions and provide detailed insights on market trends, consumer preferences, and competitor activities.

- Foster stronger partnerships with government agencies, industry associations, and international trade bodies to streamline market access processes and address regulatory challenges.
- Encourage collaboration with other horticulture sectors to share best practices and resources
- Identify and target emerging markets with high growth potential to reduce dependency on traditional markets.
- Develop tailored marketing strategies for each target market, considering local preferences and cultural nuances.
- Expand the multi-industry export training program to cover more topics and reach a broader audience
- Invest in infrastructure and technology to optimize the supply chain, reduce costs, and minimize post-harvest losses.
- Facilitate better coordination of logistics for export registrations, inspections, and audits to ensure timely and efficient export processes
- Intensify promotional campaigns in key markets to raise awareness and demand for Australian table grapes
- Leverage digital marketing and social media to reach a wider audience and engage with consumers directly
- Conduct regular meetings and training to ensure preparedness among industry stakeholders.
- Establish mechanisms to document and share knowledge and best practices within the industry.

These recommendations aim to build on the successes of previous programs, addressing current challenges while positioning the Australian table grape industry for sustainable growth and increased global market presence.

Keywords

Australian Table Grape Association; ATGA, Market Intelligence; Export Registration; HEICC; International Inspectors; Biosecurity; Market Access; Market Improvements

Introduction

The Australian table grape industry, comprising approximately 400 corporate and family-run entities, spans 25,000 acres across mainland states and the Northern Territory. With an annual production of around 230,000 tonnes valued at over \$700 million in 2019, rising to \$918 million in 2023, the industry plays a significant role in the national economy. Despite facing substantial challenges such as the COVID-19 pandemic, seasonal labor shortages, environmental pressures, regulatory changes, rising production costs, reduced chemical availability, vineyard health decline, and unseasonal weather events, the industry has demonstrated remarkable resilience. The export value remained stable at \$557 million from 2019 to 2023, with Victoria being the predominant exporter, while emerging producers in central Queensland and Western Australia have also begun contributing to exports.

The Table Grape Market Access and Trade Development Project was undertaken to address critical needs within the industry. The primary rationale for the project included:

- Market access expansion to enhance and secure market access for Australian table grapes, particularly in high-demand international markets.
- Trade development to support the growth of export volumes and values by improving market penetration and developing new market opportunities.
- Industry competitiveness to ensure the Australian table grape industry remains competitive on a global scale by adopting best practices, improving quality standards, and leveraging innovative technologies.
- Sustainability and resilience to build the industry's resilience against challenges such as environmental pressures, regulatory changes, and market disruptions.

The significance of this project for the Australian table grape industry cannot be overstated. By focusing on market access and trade development, the project aimed to:

- 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 exporters 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 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.

Methodology

The strategies employed in the table grape market access and trade development project were tailored to meet the diverse needs of the various activities undertaken. The TG20000 project team followed the initial project plan as a framework but adapted their approach based on the specific requirements of the audience. This included considering the unique issues, needs, and attitudes of producers and other stakeholders, ensuring a responsive and effective strategy for market access and trade development. The methodologies applied included:

- **Workplan Development and Project Management** – A Project Reference Group was established to oversee the project's strategic direction and ensure alignment with industry goals. The PRG comprised key stakeholders, including industry representatives, government officials, and export experts; detailed annual work plans were developed to outline specific activities, timelines, and responsibilities. These plans were regularly reviewed and updated based on project progress and emerging needs; a comprehensive monitoring and evaluation framework was implemented to track project outcomes, measure success, and identify areas for improvement. This included regular reporting, data collection, and analysis; a proactive risk management plan was developed to identify potential risks, assess their impact, and implement mitigation strategies. This plan was regularly reviewed and updated to address new challenges and ensure project resilience.
- **Export Readiness and Capacity Building** – several methodologies were engaged here including:
 - **Stakeholder Engagement and Communication Plan.** A robust engagement plan was created to foster collaboration with growers, industry bodies, and relevant stakeholders. This included regular updates, newsletters, and meetings to keep stakeholders informed and involved.
 - **Export Workshop Forums.** A series of export workshop forums were conducted to educate growers and exporters on market access requirements, quality standards, and best practices. These forums provided practical training and resources to enhance export readiness.
 - **Engagement Across the Horticulture Export industry.** Extensive engagement was carried out across the horticulture export industry, involving growers, Industry Reference Bodies (IRBs), and other stakeholders. This ensured a coordinated approach to market access and trade development.
 - **Online Export Registration and Enhanced Mapping Development.** An online registration and mapping system was developed to streamline the export registration process and provide a centralised platform for managing export activities.
 - **Communication and Publications.** Market intelligence reports, newsletters, and articles were regularly published to disseminate valuable information to industry stakeholders. These publications covered export statistics, market trends, and industry updates.
- **Trade Development and Market Access, methodologies applied were:**
 - **Market Improvements.** Initiatives were undertaken to improve market conditions, including addressing trade barriers, enhancing market infrastructure, and improving supply chain logistics.
 - **Market Maintenance.** Ongoing efforts were made to maintain existing markets through regular engagement with importers, compliance with regulatory requirements, and participation in trade shows and promotional activities.
 - **Coordinating Overseas Countries Pre-shipment Inspections and facility Audits.** Coordination of pre-shipment inspections and facility audits by international inspectors was facilitated to ensure compliance with import standards and protocols.
 - **Exporter Directory.** An exporter directory was developed and maintained to provide a comprehensive list of certified exporters, enhancing transparency and facilitating market connections.
- **Collaborative partnerships with Relevant Stakeholders.** Partnerships were established and strengthened with key stakeholders, including government agencies, industry associations, and international trade bodies. These collaborations were crucial for addressing regulatory challenges, sharing best practices, and promoting Australian table grapes in global markets
- **Outbound and Inbound Trade missions. / In-Market Relationships.** Trade missions were organised to promote Australian table grapes, build relationships with international buyers, and explore new market opportunities. These missions included both outbound trips to target markets and inbound visits by international buyers to Australian production sites. In-market relationships were designed to build ongoing relationships with key market players were cultivated to strengthen Australia's presence in international markets. This included regular communication, joint promotional activities, and participation in international trade events.

By employing these methodologies, the Table Grape Market Access and Trade Development project successfully enhanced the industry's export capabilities, expanded market access, and ensured the long-term sustainability and growth of the Australian table grape industry.

Results and discussion

ATGA successfully delivered achievement criteria and outputs as part of the Table Grape Market Access and Trade Development to the Australian Table Grape Industry project, TG20000.

As part of the project, TG20000

- Visited table grape growing regions throughout Australia
- Held export workshop and forums in the major growing regions
- Engaged DAFF to provide up-to-date information on market access and development at regional forums
- Engaged with the horticulture family of growers, exporters, IRB's and relevant stakeholders on all matters related to exports
- Attended industry development, training, and information sessions
- Provided information to growers and exporters on overseas countries requirements for exports
- Liaised with Australian Embassy's and Agricultural Counsellors
- Improved the dissemination of information on chemical use and MRL compliance for exports to various countries
- Attended strategic federal and state government meetings on market access and trade development
- Sourced and disseminated market intelligence reports from various countries
- Contributed to market access and trade development articles in the Vine magazine through the table grape communications project
- Had input into fortnightly editions of the industry newsletter, *Pick of the Bunch*
- Successful export registrations undertaken of all growers and pack houses
- Coordinated and participated in Inbound and outbound trade missions
- Attended and participated in international market trade shows
- Progressed market access and market improvement requests with the federal government
- Logistically coordinated pre-shipment clearance inspections required by countries that send and international inspector
- Coordinated and participated in successful international audits of table grape farms of the picking, packing, and marketing of table grapes
- Produced an updated export directory each year

As a result of these activities, Australian table grape producers successfully exported their grapes to over 40 countries across the world. This is despite the ongoing challenges presented by several countries and the unfortunate climatic conditions which had an adverse effect on table grape quality. Despite the challenges faced, table grapes sustained a remarkable volume of exports in the post COVID period to still remain Australia's highest export commodity by value

Table 2 Major exporters of table grapes 2017/18 - 2022/23

	2017/18	2018/19	2019/20	2020/21	2022/23	1 yr chg	5 yr trend	2022/23 share
Southern Hemisphere	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
Australia	145,995	152,180	120,725	108,204	132,316	22.3%	-2.4%	3%
Peru	384,937	398,663	465,777	538,355	596,967	10.9%	11.6%	13%
Chile	653,991	605,951	524,278	607,478	498,711	-17.9%	-6.6%	11%
South Africa	320,169	334,114	385,463	399,533	332,189	-16.9%	0.9%	7%
Brazil	46,058	47,199	60,007	66,733	57,783	-13.4%	5.8%	1%
Northern Hemisphere								
Italy	460,750	432,226	473,835	460,706	447,662	-2.8%	-0.7%	10%
China	280,669	367,703	425,640	347,040	397,317	14.5%	9.1%	9%
United States	414,114	369,907	360,034	303,166	290,202	-4.3%	-8.5%	6%
India	249,002	184,951	267,940	275,766	280,600	1.8%	3.0%	6%
Turkey	174,920	205,709	214,557	263,570	227,171	-13.8%	6.8%	5%
Spain	174,481	163,354	199,999	197,894	180,506	-8.8%	0.9%	4%
Mexico	156,401	198,628	161,609	164,851	173,126	5.0%	2.6%	4%
Other	781,505	759,654	726,465	946,578	921,093	-2.7%	4.2%	20%
Global Exports	4,242,991	4,220,240	4,386,329	4,679,873	4,535,642	-3.1%	1.7%	100%

Source: ITC Trademap, IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 1: Major exporters of table grapes 2017/18 - 2022/23

Long Term Trend Analysis

Table grape exports had increased over 300 per cent to peak above 150,000 tonnes in 2020. While the unit value has also increased, it has been influenced by the AUD USD exchange rate. The exchange rate dipped below .60c US in March 2020. The rate has been around .67c through much of the 2023 season allowing exports to be more competitive.

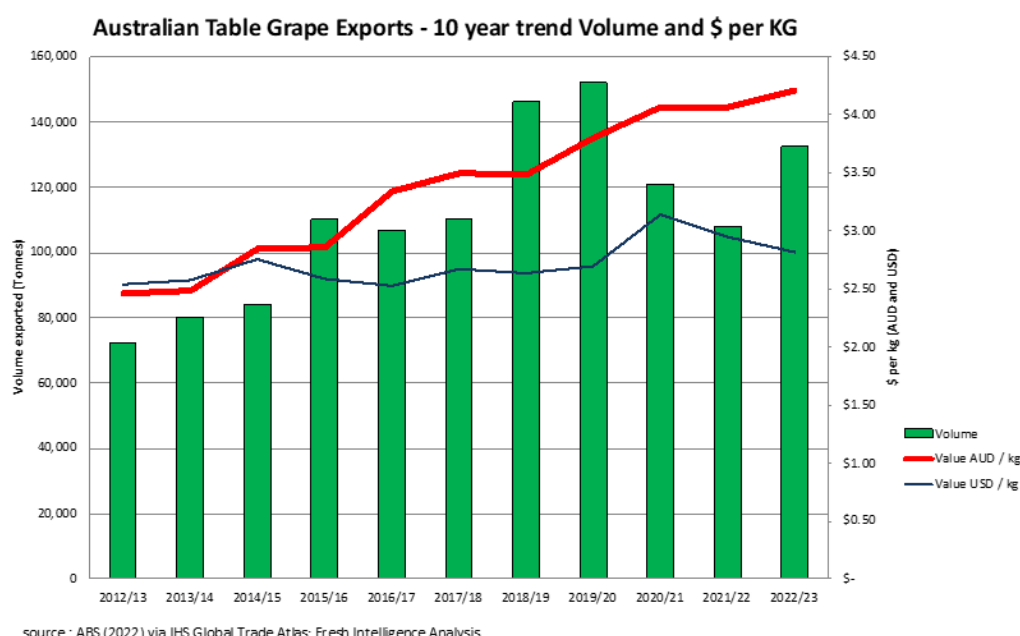


Figure 2: Australian table grape exports – 10 year trend volume and \$ per KG

Outputs

Table 1. Output summary

Output	Description	Detail
Annual market access and trade development work plan:	Annual review of the work plan delivered in milestones and to the PRG	Six-monthly reviews of: Annual work plan - including Stakeholder engagement plan Risk management plan and Program logic
Export Forums and interaction with growers and pest monitors in the major growing regions of Australia. These include Mildura and Robinvale in Victoria, Emerald, Mundubbera and St George in Queensland and Swan Valley and Carnarvon in Western Australia	The audience were levy paying farmers who intended to export their product and crop monitors associated with the farmers.	Direct communication is a highly valued source of information for levy payers. The export forums are mandatory for all growers intending to export. Presentation topics included enhancements to the export registration system, reinforcement of grower requirements under the Accredited Properties Legislation, updates on chemical use and maximum residue limits of each importing country, grower expectations on audit compliance from DAFF. See Appendix 1 – Export Forums

Engagement and representation across the horticulture export industry with growers, Peak industry bodies and stakeholders. Presentations at various forums and workshops	Meetings with other exporting industries such as Citrus, Summerfruit, Avocados, Apple and Pear, Mangoes, Berries	Over the 3 years of the project there was direct contact on a continual basis with citrus discussing export related challenges and common issues, presentations at Summerfruit, Avocados and Berries demonstrating how those industries could encourage growers to increase exports and to learn from the approach taken by the ATGA to achieve the success they have had. Presentations at State government forums See Appendix 2 – Engagement with other industries
On-line export registration and mapping development. On average there is over 2400 individual registrations	Intended audience was all growers and pack houses	On an annual basis all growers and pack houses are required to register with the ATGA for export. Individual blocks on farms are required to be mapped, size calculated, country destinations listed, table grape variety named, individual blocks numbered, location of pest traps and a meeting point for DAFF auditors. These registrations are then vetted by the ATGA for accuracy before submitting to DAFF for accreditation. If DAFF requires any amendments, the applications are sent back to the ATGA for correction. Prior to accreditation, DAFF undertake audits of growers, the scheduling of the audits are coordinated by the ATGA and the export system. See Appendix 3 – Extract of the export registration system
Sourcing of export market intelligence and dissemination to an average 717 of growers, exporters pack house managers, pest monitors, agronomists, and relevant stakeholders	Audience are all growers, exporters, pack houses, supply chain logistics, pest monitors and agronomists	Market intelligence is sourced from several organisations. The main intelligence disseminated are market reports from Asian country wet markets delivering on landed fruit, exporter, brand, price received and movement capacity. This also includes intelligence from our competitor countries such as Peru, Chile, South Africa, and India. This is disseminated on a weekly basis during the export season. Other intelligence includes monthly export statistics and an industry snapshot of export information. See Appendix 4 – Extracts of Market Intelligence distributions
Social media, E-news and direct email:	e-news <i>Pick of the Bunch</i> Facebook, Instagram, LinkedIn, and Twitter Emails from the CEO	Contributions to each fortnightly <i>Pick of the Bunch</i> e-news. ATGA social media used to notify the producer community; (e.g. to send timely disease alerts), and to extend the reach of TG20000 outputs. Sensitive content is distributed via email from the CEO. See Appendix 5 – Pick of the Bunch examples

Fact sheets; in collaboration with TG18004 & TG22001 ATGA Communications, available online:	Distributed at export forums and workshops Australia wide and available online www.australiangrapes.com.au	Topics: Labour, Covid, Food safety, Maturity, Pest and disease, Spray drift. See Appendix 6 - Factsheets
Videos; in collaboration with TG19000 Extension of Technologies and best management Practices to the Australian table Grape Industry	Ten videos produced in collaboration with TG18004 & TG22001, available online: www.australiangrapes.com.au www.facebook.com/AustralianTableGrapeAssociation https://www.instagram.com/austablegrapes/ https://ca.linkedin.com/company/australian-table-grape-association https://www.youtube.com/@austablegrapes	Video topics: Labour, Crop monitoring, Pest and disease, Sprayer maintenance, Spray application See Appendix 7 – Videos and views
Articles for The Vine magazine	12 editions of the quarterly industry magazine <i>The Vine</i> 800-900 print copies are sent. The digital edition reaches an average of 850 reads per edition.	Topics that relate to market access and trade development: Labour, Mental health, Food safety, Quality assurance, Marketing, Maturity, MRLs, Biosecurity, Vineyard hygiene, Sustainability, Responsible farm waste disposal, Pest & disease, Soft chemistry, Optimising spray application, See Appendix 8 – Export Articles in the Vine.
Website maintenance	Availability of information via the website was paramount to the success of the project deliverables. www.australiangrapes.com.au	See Exporter Section
Representation: forums and advisory panels	The project represented the interests of levy-paying producers and the ATGA. Most of the committees were externally organised	Representation and attendance on various committees: Biosecurity –Consultative Committee on Emergency Plants (CCEPP), Plant Industry Forum Committee, DAFF Xylella working group, local Greater Sunraysia Pest Free Area working group, National Phylloxera Management Action Plan Committee, Oriental Fruit Fly exercise planning group COVID-19 stakeholder committee led by Agriculture Victoria Fruit Fly Murray Valley committee Horticulture Industry Network (Agriculture Victoria) Ad Hoc State and national horticulture industries
Participation and coordination of Outbound (1) and Inbound trade missions (12)	Audience was for all growers and exporters, Outbound was under an EOI process	Inbound trade mission from Thailand, China, Korea, Japan and a delegation from Southeast Asian counties of Thailand, Philippines, Malaysia, Indonesia and

		Vietnam received by the ATGA, industry presentations, farm and pack house visits and grower and exporter networking sessions. Outbound trade mission to Vietnam. Growers and exporters attended from an EOI process. Visited retail outlets, distribution centers, cool storage facilities and conducted networking sessions with importers
Coordination of overseas countries pre-shipment inspections	Audience was for all growers and exporters who had consignments for New Zealand in all years	All export consignments were randomly inspected by New Zealand exporters See Appendix 9 – New Zealand Inspectors
International audits by biosecurity personnel.	Random growers selected by DAFF	International auditors visit once per year from Korea and Japan auditing table grape grower and pack house procedures and DAFF biosecurity arrangements
Exporter directory production	Audience is all importers and distributors from around the world www.australiangrapes.com.au Export section	Listing of all exporters of grapes in Australia by name with links to their individual websites. There was a redevelopment of the Exporter Director August to December 2023. This included: - Development of an accessible and interactive Exporter Directory - Searchable by variety, location, exporter and alphabetised. - Icon key for each exporter which identifies whether they export green, red and/or black grapes. - Links to exporters websites and contact information. - Displays available varieties and links to varietal pages on ATGA website (also in redevelopment) - Application process streamlines efforts. - Development of a promotional postcard allows customers to scan QR code, see industry information at a glance (inc. availability calendar, varieties, growing regions and <i>Exporter Directory</i>) and click to relevant sections - Exporter Directory Application - Australian Table Grape Association (australiangrapes.com.au) - Exporter Directory Archive - Australian Table Grape Association (australiangrapes.com.au) See Appendix 10 - Extract of the Exporter Directory
Created strong relationships with government officials,	Audience is personnel within DAFF and DFAT with communication and	Maintained and fostered strong relationships with all relevant

Agriculture Counsellors, and Australian embassy personnel	dissemination of information gained to the levy payers and exporters	stakeholders from government ministers and officials, especially Agriculture Counsellors and other personnel in an effective way of receiving and communicating knowledge and awareness of export matters.
Provided technical input at forums and events at federal and state government levels	Audience is federal and state government agriculture, biosecurity, and trade personnel.	Participated at federal government meetings such as HEICC, NTB, biosecurity round tables, traceability forums, Plant Health Australia, state government meetings ranging from viticulture biosecurity meetings, MRL forums, global trade, export forums, Hort Innovation iTAP and IMAP meetings
Taste Australia/Grown in Good Nature trade show attendance	Asian importers, retailers and distributors	Participated and attended trade shows in Hong Kong and Thailand – Asia Fruit Logistica; Japan – Foodex; Vietnam – Vietnam Food and Trade; Singapore – Hotel Food Asia See Appendix 11 – Trade Shows
Project reference group meetings:	Project reference group	Online meetings to review project progress and seek input to the work plan.

Outcomes

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
An informed and capable industry, aware of export opportunities and requirements	Strategic Investment Plan 2022-2026: Objective 4, Strategies 1-3 This outcome aligns with the fund's objective to enhance the knowledge and capabilities of industry participants, ensuring they are well-equipped to capitalize on export opportunities and comply with export requirements.	The project focused on increasing the knowledge and capabilities of the industry by providing comprehensive training programs and disseminating regular market intelligence reports. These initiatives ensured that industry participants were well-informed about export opportunities, market conditions, and compliance requirements.	Dissemination of weekly market intelligence reports; Attendance at training workshop forums; list of trade and market access emails sent; informative links in the fortnightly newsletter
Evidence of maintained and increased export knowledge, attitudes, skills, and aspirations (KASA) within the Australian table grape industry leading to practice change	Strategic Investment Plan 2022-2026: Outcome 1, Strategy 1-3 This outcome aligns with the projects objective to build the capacity and capability of the Australian table grape industry,	The project focused on enhancing the export knowledge, attitudes, skills, and aspirations (KASA) of the Australian table grape industry through a variety of educational and capacity-building initiatives.	Documentation of workshop forums sessions conducted, including attendance and participant feedback, emails distributed to industry stakeholders advising of best practice and export compliance through the

	ensuring that stakeholders are well-equipped with the knowledge, skills, and attitudes necessary to successfully navigate and thrive in export markets.	Comprehensive training programs were conducted to provide practical knowledge and skills, while regular dissemination of market intelligence and best practices helped to keep stakeholders informed and motivated. Continuous learning initiatives were implemented to foster a culture of ongoing improvement and adaptation to new challenges and opportunities.	Accredited Properties Legislation, presentations by invitation from DAFF on best practice and DAFF auditors on export compliance requirements, presentation from APVMA on chemical compliance, revision of pest monitoring and record keeping. Most of this is undertaken annually
Improvements in export supply chain and market access	Strategic Investment Plan 2022-2026: Outcome 2, Strategy 5 This outcome aligns with the fund's goal to enhance the efficiency and effectiveness of the export supply chain and to improve market access for Australian table grapes.	The project aimed to improve the export supply chain by enhancing quality standards and optimising logistics. By focusing on these areas, the project ensured that Australian table grapes met international standards and that the supply chain operated efficiently and cost-effectively.	The DAFF certification records data showing the number of growers meeting new export quality standards. Feedback from exporters about improvements in the supply chain and market access.
Effective management of export related risks	Strategic Investment Plan 2022-2026: Objective 3, Strategies 1-3 This outcome supports the projects' objective to mitigate risks associated with exporting, ensuring the stability and resilience of the industry.	The project addressed export-related risks by developing a comprehensive emergency response plan and providing risk management advice. These initiatives helped the industry prepare for and respond to potential disruptions, ensuring continuity and stability.	Provision of a risk management plan; attendance at risk mitigation teams meetings with DAFF and Agricultural Counsellors, feedback from growers and exporters about the effectiveness of the risk management strategies employed, emails to growers and exporters communicating timely information
Close collaboration with linked industry projects	Strategic Investment Plan 2022-2026: Objective 3, Strategies 2 This outcome aligns with the projects goal to foster collaboration across the industry, leveraging synergies and shared resources to achieve common objectives.	The project emphasised close collaboration with linked industry projects, establishing partnerships and coordinating efforts to maximize impact. Regular communication and coordination ensured that all stakeholders were aligned and working towards common goals.	Meetings with other industries, either formal or in-formal, requests. The from other industries for a presentation on trade and market access, support with collaborative industries export registration and MRL compliance

Maintenance of export markets and development of new export market opportunities	Strategic Investment Plan 2022-2026: Objective 1 Strategies 1-4 This outcome supports the fund's objective to sustain existing export markets and develop new opportunities, ensuring the continued growth and diversification of exports.	This project focused on maintaining existing export markets and developing new opportunities by organising trade missions and promotional activities. Strong in-market relationships were cultivated to ensure ongoing demand and support for Australian table grapes.	Inbound and outbound trade missions took place, export volumes remained high although slight decrease due to climatic and labour challenges, re-built strong relationships and reconnected networking post Covid era.
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Monitoring and evaluation

Table 3. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
To what extent has the project improved knowledge and awareness of existing and emerging markets	The Table Grape Market Access and Trade Development Project significantly improved knowledge and awareness of existing and emerging markets through a variety of targeted activities and initiatives. Key aspects of project performance that address this evaluation question include: - Comprehensive market intelligence reports – the project provided regular, detailed market intelligence reports covering both existing and emerging markets. These reports included data on market trends, consumer preferences, competitor activities, and economic conditions, offering valuable insights to growers and exporters. - Weekly export statistics and market reports – Weekly updates on export statistics and market conditions, including detailed reports from Chinese wet markets, helped stakeholders stay informed about current market dynamics and make data-driven decisions, - Export workshop forums – A series of export workshop forums were conducted, educating growers and exporters about market access	Opportunities for Improvement: - Enhanced data analytics - Utilise advanced data analytics tools to provide more detailed and predictive market insights. - Broader market coverage – Expand the scope of market intelligence reports to cover more emerging markets and niche segments. - Regular feedback mechanisms – Implement regular surveys and feedback mechanisms to continuously improve the relevance and usefulness of market intelligence reports. Future Development: - Interactive market dashboard – Develop interactive online dashboards where stakeholders can access real-time market data and customise their queries. - Enhanced training programs – create advanced training modules focused on emerging markets and incorporate case studies of successful market entries.

	requirements, quality standards, and best practices for penetrating new markets. These forums significantly enhanced participants' understanding of both established and potential markets. • Stakeholder engagement and communication plan – The robust engagement plan included regular newsletters, updates, and meetings, ensuring continuous information flow and keeping stakeholders abreast of market developments. This facilitated better preparedness and responsiveness to market opportunities and challenges. • Trade missions and in-market activities – Outbound and inbound trade missions provided firsthand exposure to international markets. These missions enabled growers and exporters to understand market conditions, establish connections with buyers, and gain insights into consumer behavior and preferences. • Collaborative partnerships – The project fostered strong partnerships with government agencies, industry associations, and international trade bodies. These collaborations facilitated information exchange and provided access to a broader range of market intelligence and resources. • Online export registration and mapping system – The development of an online registration and mapping system enhanced the efficiency of the export process and provided a centralized platform for managing export activities. This system also served as a valuable tool for tracking market engagement and performance. • Publications and articles – Regular contributions to industry publications, such as The Vine, disseminated critical information about market conditions, export opportunities, and industry trends, thereby increasing	
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	overall awareness and knowledge among stakeholders. By implementing these strategies, the project significantly enhanced the industry's knowledge and awareness of both existing and emerging markets, equipping stakeholders with the information needed to make informed decisions and strategically expand their market presence.	
To what extent has the project met the needs of industry levy payers	The project successfully addressed the needs of industry levy payers through a range of targeted initiatives and outcomes. Key aspects of project performance that demonstrate how the needs of industry levy payers were met include: • Market access and improvements – The project achieved significant progress in progressing the opening of new markets and expanding existing ones, directly benefiting levy payers by increasing export opportunities and revenue streams. The development and maintenance of export quality standards ensured that Australian table grapes met the stringent requirements of international markets, facilitating smoother market entry and expansion. • Enhanced export readiness – Through comprehensive training programs and export workshop forums, the project equipped growers and exporters with the necessary skills and knowledge to navigate the complexities of international trade. These initiatives included training on export regulations, market entry strategies, and compliance with quality standards, directly addressing the needs of levy payers aiming to improve their export capabilities. • Timely and relevant market intelligence – The provision of regular market intelligence reports and weekly updates on export statistics and market conditions helped levy payers stay informed about market	Opportunities For Improvement: 1. Target support services – Offer more tailored support services to address specific challenges faced by individual levy payers. 2. Regular needs assessment – Conduct needs assessments to stay updated on the evolving needs and priorities of levy payers. 3. Increased accessibility – Ensure needs assessments to stay updated on the evolving needs and priorities of levy payers. Future Development: 1. Customised advisory service – Develop customised advisory services that provide one-on-one support for levy payers, focusing on their unique circumstances. 2. Enhanced communication channels – Strengthen communication channels to ensure timely and efficient dissemination of information and support. 3. Leverage technology – Use technology to create virtual support hubs where levy payers can access resources, ask questions, and receive immediate assistance.

	trends and opportunities. This timely and relevant information enabled them to make data-driven decisions and adapt their strategies to changing market dynamics. • Support for export registration and compliance – The project facilitated the logistics and aided with growers' export registrations, as well as supporting DAFF's audit of export facilities. This support was crucial in ensuring that levy payers could meet export requirements efficiently and cost-effectively. • Promotion and trade activity – By organising and participating in outbound and inbound trade missions, the project promoted Australian table grapes to international buyers and importers. These activities enhanced the visibility and reputation of Australian table grapes, driving demand and creating new business opportunities for levy payers. • Risk management and resilience – The development of an emergency industry consultation and response plan addressed potential market disruptions and closures, providing levy payers with a framework for managing risks and ensuring business continuity. This proactive approach was vital in maintaining the stability and resilience of the industry. • Collaborative efforts and stakeholder engagements – The project fostered collaboration with key stakeholders, including government agencies, industry associations, and international trade bodies. These partnerships facilitated the sharing of best practices, resources, and market intelligence, directly benefiting levy payers by enhancing their access to valuable information and support. • Communication and information sharing – Regular communications, including	
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	newsletters, articles, and updates in industry publications such as The Vine, ensured that levy payers were kept informed about project activities, market developments, and industry trends. This transparency and open communication helped build trust and engagement among levy payers. Overall, the project effectively met the needs of industry levy payers by providing them with the tools, knowledge, and support necessary to succeed in the competitive global market.	
Have regular project updates been communicated through industry communication channels	The Table Grape Market Access and Trade Development Project ensured that regular project updates were effectively communicated through a variety of industry communication channels. Key aspects of project performance that address this evaluation question include: • Industry publications and newsletters – The project team regularly contributed articles and updates to industry publications, such as The Vine, which is widely read by stakeholders within the table grape industry. These articles covered project milestones, market intelligence, export statistics, and other relevant information. • Fortnightly newsletters – Fortnightly newsletters were distributed to industry stakeholders, including growers, exporters, and industry bodies. These newsletters provided concise updates on project progress, upcoming events, training opportunities, and important industry news. • Email communications – Targeted emails were used to disseminate critical information to specific groups of stakeholders. These emails included updates on regulatory changes, export requirements, and invitations to participate in training sessions and trade missions.	Opportunities For Improvement: 1. More frequent updates – increase the frequency of updates to ensure stakeholders are continually informed of the latest developments. 2. Stakeholder feedback – Regularly solicit feedback from stakeholders on the effectiveness of communication efforts and make adjustments as needed. Future development: 1. Interactive communication platforms – Develop interactive platforms where stakeholders can access updates, participate in discussions, and provide feedback. 2. Enhanced transparency – Create a transparent communication strategy that includes progress tracking and clear reporting on milestones and outcomes.

	• Website updates – The project maintained a dedicated section on the ATGA website, where stakeholders could access the latest news, reports, and resources related to the project. This online repository ensured that all relevant information was easily accessible and up to date. • Social media engagement – The project leveraged social media platforms, including LinkedIn and Twitter, to share real-time updates and engage with a broader audience. These platforms were used to promote events, share market insights, and highlight project achievements. • Stakeholder meetings and webinars – Several stakeholder meetings and webinars were organised to provide live updates on the project's progress and discuss key issues affecting the industry. These interactive sessions allowed for direct communication between the project team and industry stakeholders. • Workshops and forums – Export workshop forums and training sessions included segments dedicated to providing updates on the project. These events not only offered valuable training but also kept participants informed about the latest developments and project activities. • Collaborative communication with industry partners – The project team worked closely with industry partners, such as Hort Innovation and the Department of Agriculture, to ensure consistent and coordinated communication efforts. This collaboration helped amplify the reach and impact of project updates. By utilising these diverse communication channels, the project ensured that regular updates were effectively communicated to all relevant stakeholders within the table grape industry. This	
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	comprehensive communication strategy facilitated transparency, engagement, and informed decision-making among industry participants.	
Did the project engage with industry levy payers through their preferred learning style	The Table Grape Market Access and Trade Development Project effectively engaged with industry levy payers by employing a variety of learning styles and formats to meet diverse preferences and ensure comprehensive knowledge transfer. Key aspects of project performance that address this evaluation question include: • Workshops and hands-on training – Practical hands-on training sessions and export workshop forums were organised to provide levy payers with direct, experiential learning opportunities. These sessions covered essential topics such as export regulations, market entry strategies, and quality standards, allowing participants to apply what they learned in real-world scenarios. • Webinars and on-line training – To accommodate levy payers who prefer flexible, remote learning options, the project offered webinars and online training modules. These sessions provided the same high-quality content as in-person workshops but allowed participants to engage from the convenience of their own locations. • Printed and digital publications – The project produced a range of printed and digital materials, including market intelligence reports, newsletters, and articles in industry publications like The Vine. These resources catered to levy payers who prefer reading and self-paced learning, providing them with detailed information to reference as needed. • Interactive stakeholder meetings – Several stakeholder meetings and interactive forums were held to facilitate discussion and feedback. These meetings provided an opportunity for levy payers to engage directly with	Opportunity For Improvement: 1. Learning styles assessment – Conduct assessments to better understand the preferred learning styles of levy payers and tailor training accordingly. 2. Diverse training formats – Offer a wider variety of training formats, including interactive simulations and hands-on workshops. 3. Feedback driven improvements – Use feedback from training sessions to continuously improve and adapt learning methods. Future Development: 1. Personalised learning paths – Develop personalised learning paths that guide levy payers through training based on their individual needs and preferences. 2. Virtuality reality training – Explore the use of virtual reality (VR) for immersive, hands-on training experiences that can replicate real-world scenarios.

	project leaders, ask questions, and share their experiences and insights. • Customised support and consultation – One-on-one consultations and personalised support were offered to levy payers needing specific guidance on export processes, compliance issues, or market strategies. This tailored approach ensured that individual learning needs and preferences were addressed. • Customised learning and peer networking – The project facilitated opportunities for collaborative learning and peer networking, enabling levy payers to share experiences and best practices with each other. This community-based approach helped reinforce learning and fostered a supportive industry environment. • Multimedia resources – The use of multimedia resources, such as instructional videos and visual aids, catered to visual and auditory learners. These materials complemented other learning formats and provided an engaging way to present complex information. By incorporating these varied learning styles and formats, the project successfully engaged with industry levy payers, ensuring that all participants could access and benefit from the training and resources provided in a manner that suited their individual preferences and learning styles.	
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Recommendations

Recommendations for future table grape industry extension and development programs include:

1. Research various countries individual requirements for market access.
2. Ensure that all required RD&E has been undertaken for market access into countries before applications submitted to Hort Innovation
3. Continue to update and monitor the MRL App for content and accuracy with timely dissemination of changes to industry.
4. Continue to reinforce to growers the importance of chemical use and MRL's
5. Reinforce and educate growers of the need and requirements for exporting to specific countries protocols and work plans to avoid complacency.
6. Liaise with DAFF more frequently on the progress and updated information on market access and improvement discussions and communicate this to growers in a timely manner.
7. There is a greater thirst for market intelligence by growers and exporters. This needs to be sourced and communicated more frequently.
8. Maintaining the ATGA database of levy payers and exporters to ensure all receive correct information on a weekly basis in the lead up to and during the export season.

Refereed scientific publications

N/A

Journal article

N/A

Whole book

N/A

Chapter in a book or paper in conference proceedings

N/A

References

N/A

Intellectual property

No project IP or commercialisation to report.

Appendices

Appendix 1 Export Forms and Grower Workshops











Appendix 2 Engagement with other Industries – An example a meeting Agenda where ATGA was a guest

speaker

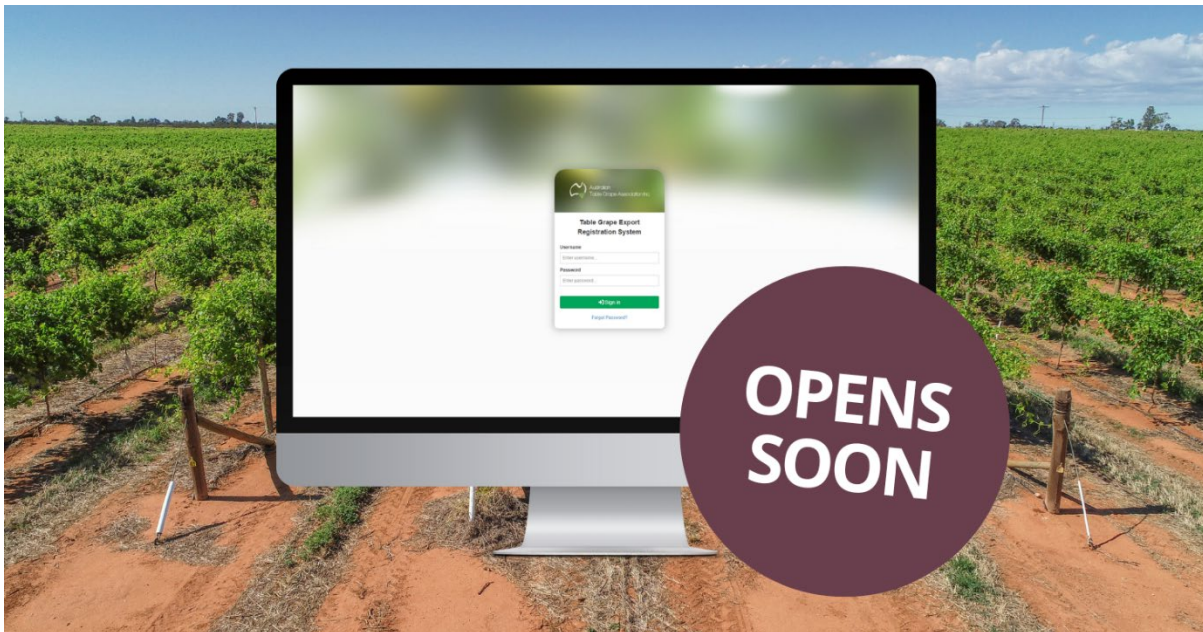
MRL risk management and extended export harvest interval modelling

10am, 5 May 2023 at the Mantra, Tullamarine

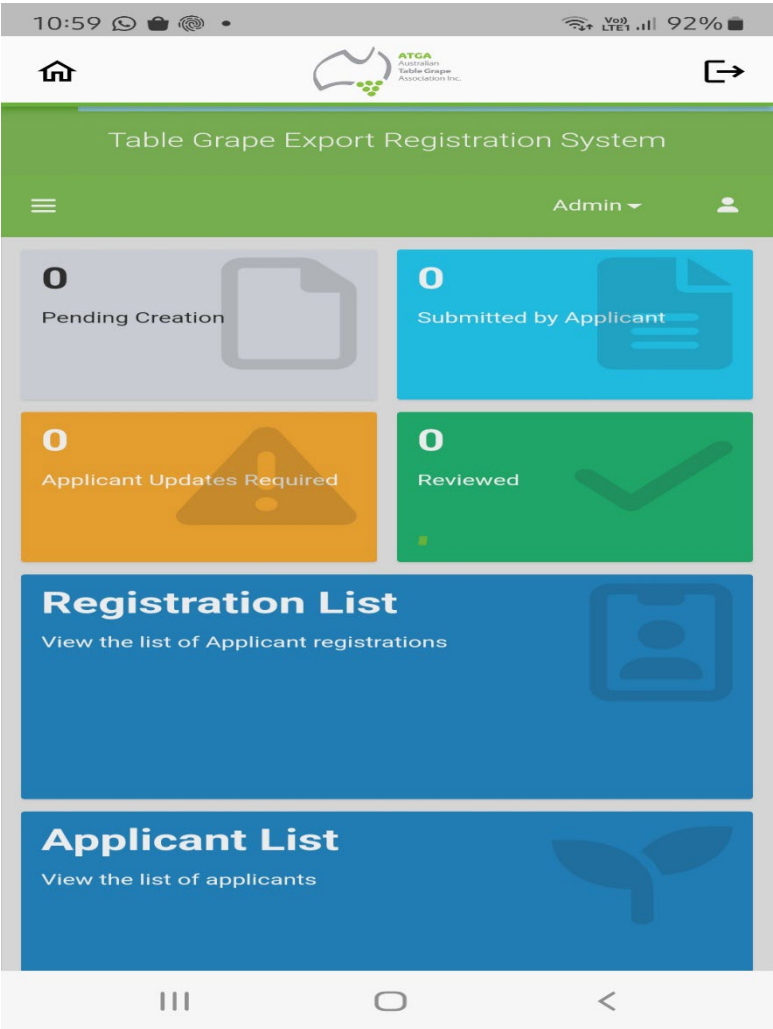
2 Trade Park Dr, Tullamarine VIC 3043

Time	Topic	Speaker	Additional detail
	Facilitators	Jenny Treeby & Alison MacGregor, ATGA	
9.30	Morning tea & registration		
10.00	Welcome and housekeeping	Alison MacGregor, ATGA	
10.10	Introduction and context	Sebastian Quinn, Agriculture Victoria Jeff Scott, ATGA Trevor Ranford, SAL Jane Lovell, CGA	Driving factors, project evolution MRLs as NTBs Engagement Sustainability
10.35	Managing MRLs & risks	Alison MacGregor, ATGA Guy Rischmueller, SAL Charlotte Brunt, CGA	Legal advice Risk management - grower and industry level Case studies of violation & impact at grower & industry level
11.00	Regulatory context – WHPs and eXtended WHPs (XWHPs)	James Deller, APVMA	Regulatory context for the discussion Case studies Labelling
11.30	Discussion on managing chemical use risk for export	Panel discussion: James Deller APVMA Jeff Scott, ATGA Trevor Ranford, SAL	Legal implications Modelling work Access to data
12.00	Lunch		
12.45	MRL app demonstrations	Jeff Scott ATGA, Charlotte Brunt, CGA	
1.15	Modelling results - impact on options for export	Charlotte Brunt, CGA Guy Rischmueller, ATGA & Alison MacGregor, ATGA	Modelling results High level information, results & data sources
1.35	Chemical toxicity to beneficials: lethal and (more challenging) sub-lethal and cumulative effects	Ary Hoffman, University of Melbourne	Lethal and sublethal effects Bioassays
2.00	Effect of washing on residues	Guy Rischmueller, SAL & Jane Lovell, CGA	Do chemicals decline through normal washing processes?
2.20	Resources	Jenny Treeby, ATGA	HIN website
2.30	Close of main meeting	Jane Lovell, CGA	

Appendix 3 Extract of the Export Registration System



Social media tiles for 2023/24 export registration and export information sessions



Appendix 4 Extract of Market Intelligence Distribution

Jiangnan Market Report

Date:	2024/4/8		Monday			Weather: Rainy								
ITEM	COLOR	ORIGIN	BRAND	VARIETY	PACKAGE	N. W.	SIZE	Selling Price (RMB)	SIZE	Selling Price (RMB)	Movement			Mark
											😊	😐	😞	
Grape	Green	Aus	888	Sweet globe	Carton	9.5kg		290-280			X			New 1/C
Grape	Green	Aus	Sky blue	Sweet globe	Carton	9.5kg		400-390			X			New 1/C
Grape	Green	Aus	Yummy	Sweet globe	Carton	9.5kg		260-250				X		New 1/C
Grape	Green	Aus	RJN	Sweet globe	Carton	9.5kg		260-250			X			New 1/C
Grape	Green	Aus	Treviso	Sweet globe	Carton Bag	9.5kg		150-140			X			New 1/C
Grape	Green	Aus	Olive grove	Sweet globe	Carton	4.5kg		270-260			X			New 1/C
Grape	Red	Aus	Luna Fresh	Crimson	Carton	4.5kg		150-140			X			New 1/C
Grape	Red	Aus	Foxes	Crimson	Carton	4.5kg		150-140			X			New 1/C
Grape	Red	Aus	Majestic	Crimson	Carton	9.5kg		260-250				X		New 1/C
Grape	Red	Aus	VJB	Crimson	Carton	9.5kg		210-200			X			New 1/C
Grape	Red	Aus	TG319-03	Crimson	Carton	9.5kg		140-130			X			New 1/C
Grape	Red	Aus	Divinely	Crimson	Carton	9.5kg		220-210			X			New 1/C
Grape	Red	Aus	Milner	Crimson	Carton	9.5kg		190-185			X			New 1/C
Grape	Red	Aus	Aquila Produce	Crimson	Carton	9.5kg							X	New 1/C
Grape	Red	Aus	Agriexpress	Crimson	Carton	9.5kg							X	New 1/C
Grape	Red	Aus	A69	Long Crimson	Carton	9.5kg							X	New 1/C
Grape	Green	SA	Ancon	Sweet globe	Carton	4.5kg							X	New 1/C
Grape	Green	Chile	Sunway-Bauza	Sweet globe	Wooden	7.3kg	JJ	310-305	J	260-255	X			New 2/C
Grape	Green	Chile	Zeyco	Sweet globe	Wooden	7.3kg	XL						X	New 1/C
Grape	Red	Chile	Rio blanco	Candy Heart	Carton	4.5kg							X	New 1/C
Grape	Red	Chile	Johnson	Crimson	Wooden	7.3kg	XL	100-90			X			New 2/C
Grape	Red	Chile	Carsal	Crimson	Wooden	4kg	XLC	80-75			X			New 1/C
Grape	Red	Chile	Carsal	Long Crimson	Wooden	7.3kg	L	130-125			X			New 1/C
Grape	Black	Chile	Exser	Sable	Wooden	8.2kg		75-70			X			New 1/C
Grape	Black	Chile	Santa Elena	Sable	Wooden	8.2kg	XL	130-125			X			New 1/C
Grape	Black	Chile	Unifruiti	Sable	Wooden	8.2kg	AA	170-160			X			New 1/C
Grape	Black	Chile	Subsole	Sable	Carton	6 in 1	R	90-85	N	85-80	X			New 2/C
Grape	Black	Chile	Rio blanco	Sweet sapphire	Plastic	8.2kg	J	125-120	XL	105-100	X			New 1/C
Grape	Green	India	Freshthrop	Sonaka	Styro	8kg		160-150				X		New 1/C
Grape	Green	India	Red tiger	Sonaka	Styro	4kg		55-50				X		New 1/C
Grape	Green	India	Sahyadri farms	Sonaka	Styro	4kg		60-55				X		New 1/C
Grape	Green	India	Saboro	Sonaka	Styro	4.5kg		65-60				X		New 1/C

SEASON	WEEK	DATE	REGION	ITEM	TRANSPORT (AIR/OCEAN)	ORIGIN	EXPORTER	BRAND	VARIETY	TYPE OF VARIETY	VOLUME (P ALLET)	SOLD VOLUME (P ALLET)	WEIGHT	PACKAG E	SELLER	OWNER	QUALITY	NEW	L	XL	J	JJ	EP
2023-2024	17	21/04/2024	GZ	GRAPE	OCEAN	CHILE	BAUZA	SUNWAY	AUTUMN ROYAL	FLAVOR GRAPES	20	20	7.3	WOOD	露姐	露姐	AVERAGE	NEW					
2023-2024	17	21/04/2024	GZ	GRAPE	OCEAN	CHILE	EXSER	EXSER	AUTUMN CRISP	GREEN SEEDLESS	20	0	7.3	WOOD	万鑫	万鑫	AVERAGE	NEW					
2023-2024	17	21/04/2024	GZ	GRAPE	OCEAN	CHILE	CARSAL	CARSAL	SWEET GLOBE	GREEN SEEDLESS	20	20	7.3	WOOD	阿旺	阿旺	AVERAGE	NEW	140	150	160		
2023-2024	17	22/04/2024	SH	GRAPE	OCEAN	AUSTRILIA	AGRIEXPRESS	AGRIEXPRESS	CRIMSON	RED SEEDLESS	20	0	9.5	CARTON	果臣	果臣	AVERAGE	NEW				280	
2023-2024	17	22/04/2024	SH	GRAPE	OCEAN	AUSTRILIA	AUSTRALIA	AUSTRALIA	CRIMSON	RED SEEDLESS	20	5	9.2	CARTON	沃衣	沃衣	AVERAGE	NEW					
2023-2024	17	22/04/2024	SH	GRAPE	OCEAN	AUSTRILIA	MARCIANO	MARCIANO	CRIMSON	RED SEEDLESS	20	10	9.5	CARTON	翼博	翼博	AVERAGE	NEW				260	
2023-2024	17	22/04/2024	SH	GRAPE	OCEAN	AUSTRILIA	AUSTRALIA	AUSTRALIA	CRIMSON	RED SEEDLESS	20	20	9.5	CARTON	惠果	惠果	AVERAGE	NEW				300	
2023-2024	17	22/04/2024	SH	GRAPE	OCEAN	CHILE	WHM	WHM	RED GLOBE	RED SEED	20	3	8.2	PLASTIC	均礼	均礼	AVERAGE	NEW	220	240	260		
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	JOHNSON	JOHNSON	RED GLOBE	RED SEEDLESS	20	20	7.3	WOOD	佛山明	佛山明	AVERAGE	NEW		185	195	205	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	JOHNSON	JOHNSON	RED GLOBE	RED SEEDLESS	20	20	7.3	WOOD	华盛	华盛	AVERAGE	NEW		185	195	205	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	CHILFRESH	SWEET GRAPES	RED GLOBE	RED SEEDLESS	20	20	8.2	WOOD	露姐	露姐	AVERAGE	NEW		240	250	260	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	CHILFRESH	CORRAL GRAPES	RED GLOBE	RED SEEDLESS	20	10	8.2	WOOD	阿旺	阿旺	AVERAGE	NEW		190	200	210	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	CHILFRESH	RED SENSATION	RED GLOBE	RED SEEDLESS	20	10	8.2	WOOD	阿旺	阿旺	AVERAGE	NEW		210	230	250	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	EXSER	EXSER	RED GLOBE	RED SEEDLESS	20	20	8.2	WOOD	周华	周华	AVERAGE	NEW		180	200	220	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	AGRICOLA INTERANDINA	GREEN QUEEN	RED GLOBE	RED SEEDLESS	20	20	8.2	WOOD	果鲜达	果鲜达	AVERAGE	NEW		200	220	240	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	CHILFRESH	EL MOLINO	SABLE	FLAVOR GRAPES	20	20	8.2	WOOD	阿昌	阿昌	AVERAGE	NEW	80	90	100		
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	SANTA ELENA	SANTA ELENA	SABLE	FLAVOR GRAPES	20	10	8.2	WOOD	山东	山东	AVERAGE	NEW		160	170	180	
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	BAUZA	SUNWAY	AUTUMN ROYAL	FLAVOR GRAPES	20	20	7.3	WOOD	露姐	露姐	AVERAGE	NEW			215	225	235
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	RIOBLANCO	RIOBLANCO	AUTUMN ROYAL	FLAVOR GRAPES	20	20	8.2	WOOD	万鑫	万鑫	AVERAGE	NEW	150	170	190		
2023-2024	17	22/04/2024	GZ	GRAPE	OCEAN	CHILE	RIOBLANCO	RIOBLANCO	SWEET SAPPHIRE	BLACK SEEDLESS	20	20	8.2	WOOD	佛山辉	佛山辉	AVERAGE	NEW			130	140	150
2023-2024	17	23/04/2024	SH	GRAPE	OCEAN	CHILE	RUCARAY	RUCARAY	JACK'S SALUTE	RED SEEDLESS	21	5	7.3	WOODEN	顺禾	顺禾	AVERAGE	NEW			220		
2023-2024	17	23/04/2024	SH	GRAPE	OCEAN	CHILE	SANTA ELENA	SANTA ELENA	SABLE	BLACK SEEDLESS	22	0	8.2	WOODEN	泽伦	泽伦	AVERAGE	NEW		160			
2023-2024	17	23/04/2024	SH	GRAPE	OCEAN	CHILE	FRUITTICO	FRUITTICO	RED GLOBE	RED SEED	23	15	8.2	PLASTIC	三水	三水	AVERAGE	NEW		220			
2023-2024	17	23/04/2024	SH	GRAPE	OCEAN	CHILE	FRUITTICO	FRUITTICO	RED GLOBE	RED SEED	24	9	8.2	PLASTIC	均礼	均礼	AVERAGE	NEW	200	220	240		
2023-2024	17	23/04/2024	SH	GRAPE	OCEAN	CHILE	EL MOLINO	EL MOLINO	SABLE	BLACK SEEDLESS	25	10	7.3	WOODEN	鑫荣德	鑫荣德	AVERAGE	NEW	100				
2023-2024	17	23/04/2024	SH	GRAPE	OCEAN	AUSTRILIA	A69	A69	CRIMSON	RED SEEDLESS	26	0	9.5	CARTON	广恒	广恒	AVERAGE	NEW			290		

Export Snapshot releases & analytics														
When?		Recipients		Opens					Clicks	Campaign		Negative		
Date	Time sent	Total recipients	Successful deliveries	Total opens	Unique opens	Open rate	Average open rate	Most opens	Accessible clicks	Campaign URL	Campaign clicks (external)	Bounced	Unsubscribed	Reason
6/03/2024	11.39am	436	99.50%	1591	278	63.80%	50.90%	857	4	bit.ly/3X1vs5l	81	2	2	1 - Old email address, 1 - unspecific
13/03/2024	5.44pm	437	99.30%	652	278	63.60%	51.30%	23	5	bit.ly/4blPplr	21	3	-	
20/03/2024	2.26pm	436	99.50%	608	257	58.90%	51.50%	68	4	bit.ly/3WPRd7l	11	2	-	
27/03/2024	1.15pm	436	99.50%	751	288	66.10%	51.50%	55	9	bit.ly/3WlaeZl	13	2	-	
4/04/2024	7.15pm	437	100%	706	286	65.40%	51.60%	95	4	bit.ly/4bjM3p1	18	0	-	
10/04/2024	11am	436	99.80%	736	279	64.00%	51.70%	125	10	bit.ly/4blR9B6	17	1	-	
18/04/2024	8.07pm	438	99.80%	600	281	64.20%	51.80%	21	29	bit.ly/4bk6uCo	18	1	-	
24/04/2024	2.41pm	437	100%	567	276	63.20%	52.00%	17	15	bit.ly/44FGIWN	13	0	-	
3/05/2024	2pm	437	99.80%	584	277	63.40%	52.00%	15	16	bit.ly/4am7Dbg	9	1	-	
7/05/2024	4.15pm	443	99.80%	542	265	59.80%	52.00%	14	5	bit.ly/4apVAK1	8	1	-	
15/05/2024	1.30pm	444	99.80%	393	243	54.70%	52.00%	16	5	bit.ly/44ISHmg	7	1	-	
22/5/24										bit.ly/3Kg3FWT				

Examples of Export Snapshot releases

EXPORT SNAPSHOT


ISSUE ONE

 26 FEB – 3 MARCH
RELEASED:
6 MARCH 2024

The 2024 export season began early, with several export shipments sent to New Zealand before Christmas. Warm, dry conditions brought production forward in many growing regions.

Australian table grape exports for the first two months totalled 41,349 tonnes, 161 per cent above the same week season to date last year.

China, Indonesia and South Korea are the top three destinations followed by The Philippines and Vietnam. South Korea has already exceeded last year's total season volume.

EXPORTS BY TONNAGE

Table grape exports departing Australia for overseas markets.

 11,070
tonnes

THIS WEEK

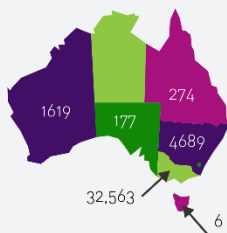
 9401
tonnes

PREVIOUS WEEK

 41,349
tonnes

THIS YEAR TO DATE

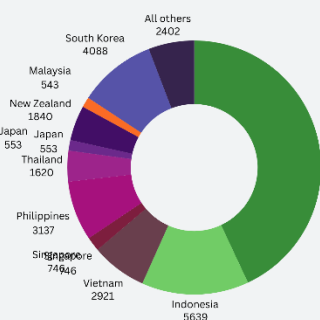
TONNAGE EXPORTED BY PRODUCTION & ESTABLISHMENT STATE (WEEKS 1-9)



TRANSPORT BREAKDOWN (WK 9)



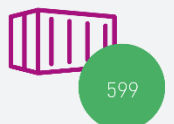
TOP 10 EXPORT DESTINATIONS WEEK 9, BY TONNES



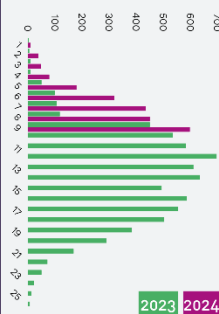
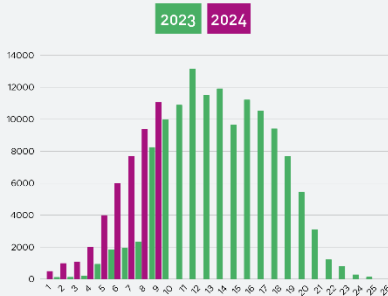
EXTRAPOLATED VALUE TO DATE


 A\$174
million

CONTAINER COUNT WK9



TONNAGE EXPORTED BY WEEK (COMPARED WITH LAST YEAR)



EXPORT SNAPSHOT


ISSUE TWELVE

 13-19 MAY
RELEASED:
22 MAY 2024

Australian table grape exports have now exceeded 100,000 tonnes, totalling 106,066 for the current season year to date.

This week, 1464 tonnes of Australian table grapes were exported, with the highest volumes sent to Indonesia (640) and Japan (241).

The top 3 export destinations are China, Indonesia and South Korea, very closely followed by The Philippines. Vietnam rounds out the top 5 markets.

By extrapolating ABS data for latest three months (to March 2024), and using a unit value of A\$4.51 per kg, the year-to-date value would be \$476.1 million.

EXPORTS BY TONNAGE

Table grape exports departing Australia for overseas markets.

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tonnes

THIS WEEK

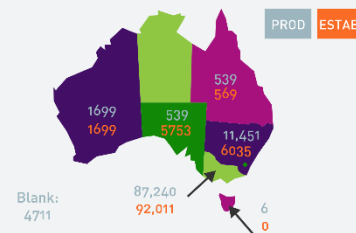
 1640
tonnes

PREVIOUS WEEK

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tonnes

THIS YEAR TO DATE

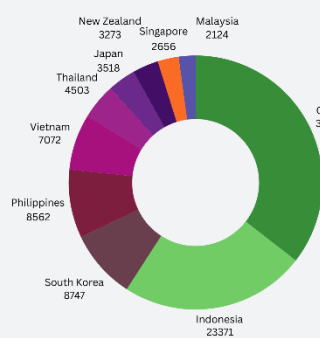
TONNAGE EXPORTED BY PRODUCTION & ESTABLISHMENT STATE (WEEKS 1-20)



TRANSPORT BREAKDOWN (WK 20)



TOP 10 EXPORT DESTINATIONS WEEKS 1-20 BY TONNES



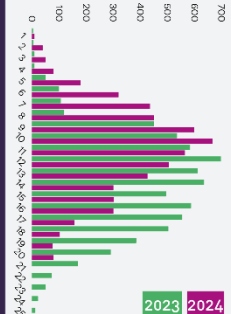
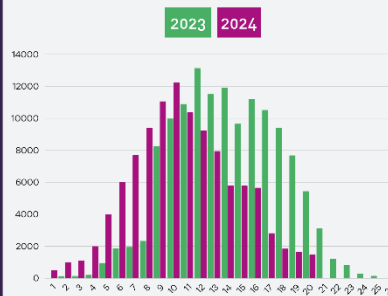
EXTRAPOLATED VALUE TO DATE


 A\$476.1
million

CONTAINER COUNT WK20

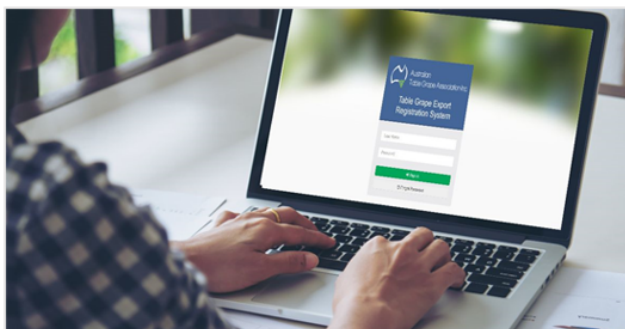


TONNAGE EXPORTED BY WEEK (COMPARED WITH LAST YEAR)



Appendix 5 Pick of the Bunch Examples

Pick of the Bunch articles



Export registration set to open

Applications will soon open for the accreditation of farms and packhouses to export table grapes to protocol markets for the 2021–22 season.

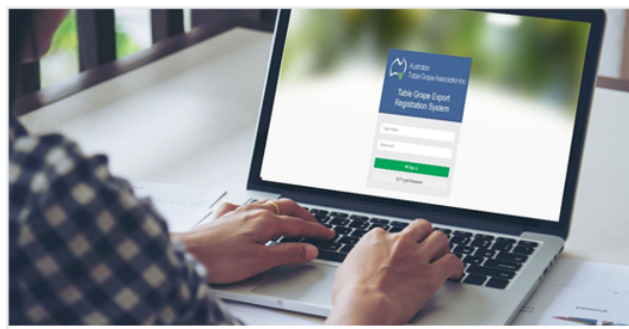
Export registration will open in early August and remain open for a period of three weeks.

The ATGA will host several workshops to support grower-exporters and exporters with the registration process over the coming weeks.

Queensland growers will hopefully have the opportunity next week to look at the registration process, while workshops will be held in Robinvale on 2 August and Mildura on 3 August. Further details will be provided by the ATGA and the Department of Agriculture, Water and the Environment (DAWE) in an Industry Advice Notice (IAN).

Farm managers wishing to apply for the first time must [contact CEO Jeff Scott](#) first to set up a profile.

Applicants will also need to ensure they have completed the 2021 Total College pest monitoring course by the deadline.



Export registration opens

Growers and exporters can now register for export ahead of the 2021/22 season.

CEO Jeff Scott opened the registration process on Tuesday, and growers can expect a formal Industry Advice Notice (IAN) soon.

Growers and exporters with existing TG numbers would have received a notification from the system to commence registration, but all growers wishing to register for the first time should contact Jeff to set up a TG number and profile.

More information and housekeeping matters are available [here](#).

To begin your registration, visit the [export registration site](#).

Growers must have their crop monitor (at least one, but may be more) complete the [2021 Total College crop monitoring course](#).

Planned export registration sessions have been cancelled due to Covid-19 restrictions, however Jeff is available to provide assistance to applicants on 0417 122 086 or [email](#).

Updates on government initiatives like IFAM, during Covid, and the Export Market Development Grants.



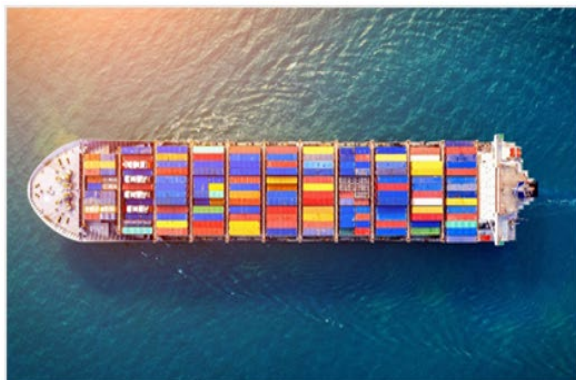
Export

IFAM extended

The International Freight Assistance Mechanism (IFAM) is a temporary, targeted, emergency support measure put in place by the Australian Government to keep global air links open in response to the ongoing effects of the COVID-19 pandemic.

On 27 August 2021, the Australian Government [announced a further \\$260.9 million in funding to extend IFAM to mid-2022](#), giving Australian businesses reliant on airfreight extra time to adapt to the new international trade environment.

Read more [here](#).



Export registration July-September 2021

Export registration deadline looms

Table grape growers and exporters have just two weeks left to register their farms and packhouses to export to protocol markets.

The Department of Agriculture, Water and the Environment (DAWE) issued an [Industry Advice Notice \(IAN\)](#) on 30 July to notify growers and exporters that export registration applications will close at 5pm on Friday 27 August.

A summary of key points for farms and packhouses in the IAN, previously identified by ATGA, is as follows, for anyone who has missed out on communications:

- Applications are now open for the accreditation of farms and packhouses to export table grapes to China, New Zealand, Taiwan, Thailand, Japan, Korea and Vietnam for the 2021–22 season.
- Table grape farm and packhouse managers wanting to export to protocol markets can complete their application forms online through the [table grape export registration system](#). Applications must be completed by 5pm AEST, Friday 27 August 2021. Late submissions will not be accepted.
- All information in the application (e.g. ABN numbers, contact details, accredited property maps and addresses) must be complete and correct or the application may not be accepted.
- Farms and packhouses will be subject to audits by the Department of Agriculture, Water and the Environment.
- Crop monitor training and assessment for table grapes is now available through the [Tocal College online eLearning hub](#).

Develop your export capacity

An Australian Government scheme which helps small- and medium-sized business develop export markets is changing.

As of 1 July 2021, the Export Market Development Grants (EMDG) reimbursement scheme will become a grant program, providing increased funding certainty for exporters, with the following improvements:

- A streamlined application process
- Apply once for a grant of 2 or 3 years
- Know how much funding you will receive before you spend

During the 2021–22 financial year (the transition year), both the EMDG reimbursement scheme and grant program will run concurrently.

The [current reimbursement scheme](#) applies for expenses incurred in FY2020–21 applications open from 1 July to 30 November 2021.

The new [eligibility-based grants program](#) commences 1 July 2021 with applications from 16 August and closing on 30 November 2021.

For more information on eligibility and how to apply [here](#).



Managing the risks

Target spiders in the vineyard with suitable chemistry. Avoid disrupting vineyard IPM program. Producers must always observe withholding periods and maximum residue limits.



Around your property

Equipment, machinery and/or discarded materials are typical hiding places for spiders. To prevent contamination of your grapes:

- Ensure equipment in the vineyard and packing shed is free of spiders and egg sacs
- Clear spaces where spiders breed, such as piles of discarded posts, irrigation lines, chemical drums, and old packaging materials.



In the vineyard

Ensure all vineyard workers are aware of the possibility of spiders and how to manage their risk:

- Wear gloves
- Look for webs
- Remove leaf litter around bunches to reduce spider habitats.
- Inspect fruit carefully, especially the centre of bunches where spiders may hide
- Check bunch bags and packing boxes carefully.



Impact on industry

Detections of redback spiders by customers either in retail settings or at home have a negative impact on the entire industry. Detections in grapes are uncommon, however spiders can pose a risk of harm to consumers and also be negatively reported on social media and news services.

Most bites occur when humans intentionally or unintentionally invade the space of the spider.



ATGA
Australian
Table Grape
Association



Appendix 6 Factsheets

Managing the risk of Redback spiders in table grapes

Redback spiders (*Latrodectus hasselti*) are found across Australia, in all table grape-growing regions.

While they are not aggressive, and avoid humans, redback spiders can pose a threat to both consumers of table grapes and producers, harvest workers, packers and transporters.

This factsheet aims to provide information on managing the risk of injury to consumers and workers and help prevent contamination of table grapes in the vineyard, at harvest, and during packing and transportation.



ATGA
Australian
Table Grape
Association Inc.

February 2023



Identification
A bite from a female redback spider has the potential to kill a human. Females have an abdomen of up to 10 mm featuring a distinct red or orange stripe on top, and an hourglass-shaped marking on the underside. Juvenile female redback spiders have several camouflage-like white markings on their abdomen. The male redback spider is not venomous to humans and is rarely seen except during mating season. Males are much smaller than females. The abdomen of males is about 4 mm long, and light brown with much paler markings than females.



Habitats
Only the female redback spins webs. Webs usually hang in dry, dark, protected areas, such as crevices, plants, logs, tree hollows and sheds. Habitats can also be in vineyards and packing sheds. The web is a messy, unstructured tangle that narrows at the back into a denser funnel-like area where the spider rests and stores its egg sacs. Male spiders do not build nests but are free roaming.



Bites
Redback spider populations increase in the warmer months, which is when people are likely to come into contact with them.

A redback spider's bite isn't always immediately apparent. Pain generally sets in about 5-60 minutes after the bite. Within an hour, the entire limb will be painful, and sweating will commence. Abdominal or chest pain may develop, and pain may also radiate to other parts of the body. Because of the slow-acting nature of the redback spider's venom, there is usually plenty of time to seek medical treatment.

Do not apply a constrictive bandage; the pressure will merely increase the pain. The only recommended action is to administer ice packs to the bite site to help reduce the pain and seek medical help as soon as possible.

Despite a high number of reported bites, in almost all instances, insufficient venom was injected into the victim to be fatal.

More factsheets available here:

<https://australiangrapes.com.au/news-resources/tools-templates/>

Appendix 7 Videos and Views



Other videos available here: [Videos & webinars - Australian Table Grape Association \(australiangrapes.com.au\)](https://australiangrapes.com.au)

Appendix 8 Export Articles in the Vine

Vine magazine articles (click to read)

ATGA CHAIR & CEO NEWS

Time for diversification

A note from our chair
I'm sure a lot of growers will be pleased to see the back of this harvest.

Whether pest and disease, labour, weather and markets all had their part to play. Some of you experienced the impact of just one of these issues, while others faced the full force of multiple. Markets and labour will definitely influence future seasons still, but I know the ATGA is continuing to work on strategies to improve the uncertainty.

As far as markets go, the ATGA board and management met with our Minister for Agriculture, Drought and Emergency Management David Littleproud, and Minister for Trade, Tourism and Investment Dan Tehan to act on the industry's behalf in our market diversification plan, including negotiating protocols to improve access to the United States, and accelerating our varietal access to Japan.

As for labour, a few of our board members were invited to be involved in the ATGA's new virtual reality-style worker training videos, funded by a Victorian Government grant, which we hope will help attract, train and retain workers for future table grape harvests.

We hope you have all enjoyed a rest by now, or that you're about to take one. It's important to take care of our selves as well as our property.

News from our CEO
The 2021 harvest season has, by reports, been the most difficult in many years – some say the worst ever.

What started out as a promising year at budburst turned into a stressful year for most growers. The expected yield that we saw show very early on in the growth phase didn't materialise, and yields were down on most farms in Sunraysia. Many put that down to weather events and conditions that didn't bode well for substantial growth in the vines.

Then, we had concerns about the supply of labour, with many growers forced to pay increased payments for labour in comparison to previous years. Throughout the Sunraysia harvest season, the ATGA had two-three meetings per week with various government instrumentalities in regard to labour, trying to re-start the Pacific Islander program, but this was thwarted early in the process by the health authorities due to COVID-19. Eventually, when the program was able to recommence, it was too late for our harvest season. The Victorian Government offered very good incentives to attract seasonal labour but there was very little uptake.

The ATGA has received a grant from the Victorian Government to initiate some activities to try and develop some tools that can be used in the future to attract seasonal workers for future years. You can read about that on page 12.

The export season has also been difficult at times. Indonesia has had some issues, but in comparison to previous years, grapes have been exported without too many changes. There have been issues with shipping logistics, congestion at ports of arrival, due to the COVID-19 impact in most Asian countries, and sales have been slow and at a lower price than previous years. The biggest concern has been the slow inspection rates at Chinese ports of arrival, particularly in the southern Chinese ports.

The ATGA has been trying to negotiate some solutions with the Australian embassy in Beijing but it has been difficult without any tangible evidence being put forward.

The industry needs to look at diversifying our export markets and, to that end, we have been working with the Federal Government on improving our protocols to countries such as the US, Japan and Canada. We have been successful in improving our export protocols. To India and the ATGA will now also look into negotiating export to Europe and Great Britain, now that Brexit is close to being finalised and discussion of FTAs with these regions ongoing. ☺

Jeremy Boyd | Chair

Jeff Scott | CEO

10 VINE MAGAZINE

ATGA CHAIR & CEO NEWS

Prepare for the new year

A note from our chair
Well, doesn't it feel like Groundhog Day?

While pruning is well under way, or almost complete for some, it feels like this season will be familiar in that it features many unknowns.

I think I've talked about uncertainty in almost every column over the past year, and this upcoming season is no different!

Big issues that we've faced and will continue to encounter include labour and markets. We talked a lot last time about the efforts of the ATGA board and team, working with local, state and federal governments on initiatives to increase availability of labour and diversify markets.

The new industry video tools for seasonal workers will give a great insight into the industry for newcomers – thanks to fellow board members Nick Maruca and Joe Garreffa for their contribution!

The announcement of the agriculture visa across the 10 ASEAN nations has been a positive step. I'm thankful for the work Anne Webster has done on this to date. If it gets off the ground, we hope it will provide some relief to growers, with labour supply continuing to shorten and growers expected to face great difficulty this season.

We hope everyone is looking after themselves, and prioritising their mental wellbeing in these tough times. Stay safe!

News from our CEO
The export season has now finished, with a number of growers having a disappointing end to the season.

It has been a challenging year, for both domestic and export markets. Let's hope that the current year is not repeated!

We have reached that time of the year where industry members need to undertake their compulsory export registration for the coming season.

Normally we'd host face-to-face events to talk through the registration process, but with multiple states in lockdown, I thought I'd highlight some important pieces of information.

Please complete your application early! If there are questions about your application they may take time to resolve. The Department of Agriculture, Water and the Environment has given short timeframes this year to supply the applied registration info to them, so it's important to complete your application early.

There are a number of things to be mindful of this year:

- make sure your application number equates to the AIN that you supply
- ensure you enter a physical address, not a PO Box
- remember to tick yes to "orchard" box (failure to do this will not allow you to enter property or block maps)
- remember to place a fruit fly trap in each registered block
- When naming your blocks, you only need to enter a numeric number, e.g. 01, 02, 03 (DAWE will not accept anything else)
- if you have your own pack house then tick no to third party only tick "third party" if you use someone else's pack house, you'll need to know their TG number and enter that in the pack house section
- you need to list your crop monitors (can be more than one), but remember all crop monitors must have completed the Total Catch crop monitoring course
- remember to sign your application when complete and submit bottom. Payments must be made when your application is complete, and PayPal is the preferred method of payment.

If you are exporting to China next year, it's important to mirror your 2019 registration block numbers to the best of your ability. At this stage, China only has 2019 registrations on the GACC website, so they will only be checking block labels against these. If this changes you will be notified immediately. Any new block registrations not included in your 2019 registration will not be allowed to enter China. The anomaly to this is that Australia has an annual registration process so if you are exporting to any other country Australia will check your 2021 registrations. ☺

Jeremy Boyd | Chair

Jeff Scott | CEO

VINE MAGAZINE 11

Article 1: May 2021: CEO report detailing China

ATGA Australian Table Grape Association Inc.

Forging ahead

REFLECTION & PREPARATION

Table grape growers nation-wide nurturing their vines for the upcoming harvest season might be inclined to reflect on the year that was. The ATGA shares some insights into last season's exports and highlights some of the strategies growers can implement to mitigate the ghosts of the past.

Export insights
The 2020/21 season started out looking quite positive, with exports on par or slightly above those of the past two seasons.

From March, however, import delays at ports in China made it abundantly clear that exports would not continue with the same vigour of the previous year.

The season ended abruptly in May, with export season volume down 20.7 per cent to 120,747 tonnes, compared with the previous season's 152,000 tonnes.

Value also dropped 26 per cent, down from \$623 million to \$460.83, and price per kilogram dipped 6.8 per cent to \$3.82 per kilogram.

Despite export results reflecting a challenging season all around, over the past five years, the export trend was 3 per cent higher per year measured from the 12 months to June.

What were the challenges?
Shipping container delays, shortages, and increasing costs have significantly affected farmers across various commodities.

The National Farmers' Federation (NFF) made claims in a recent ABC article ("Exporters, farmers fear market loss as Covid-19 drives sea freight costs sky high ABC News, 7 October) that average freight costs for Australian exporters had jumped six times in the past 18 months.

"There are enough containers in the world, it's just they're all in the wrong places at the moment... It can take six to eight weeks to get a container to where it needs to be," NFF trade manager Ash Salazar said at the time.

Business Insider Australia also reported issues at port, with the Australian Competition & Consumer Commission (ACCC) indicating it would be looking into the operations of local port operators.

Despite shipping costs increasing and significant delays at import countries, the biggest upset to production growers' report was the labour shortage.

Hort Innovation's Seasonal Horticulture labour demand and workforce study, completed by Ernst & Young (EY) last year, reported that the casual labour supply would be at a 69 per cent gap if international borders did not open by December 2021. This "hollowside" forecast will have evaporated.

Preparing for the season ahead
The ATGA has been working on several fronts to help support growers as they enter the next peak period.

Trade
ATGA CEO Jeff Scott has been liaising with the Federal Government to improve protocol conditions to the United States (US) and Japan. The upcoming bilateral meeting with the US has the removal of fumigation and pre-shipment cold treatment on the agenda.

"Hopefully the US accept just in-transit cold treatment, which will enable exports to the US to commence," Jeff said. "The government negotiators have advised that they will certainly be working very hard for the US to agree to the changed conditions. If this happens it will be another great market that growers can consider diversifying their exports to and hopefully alleviate some of the pressures experienced from other countries."

Several trade meetings have taken place or are scheduled for the next month or two ahead of the export season, and we look at the ASEAN market review and other marketing support on page 32.

While export has largely been Sunraysia-based in the past, exports from Queensland increased sevenfold last year, and there have been a number of Queensland growers set to capitalise on the early season harvest windows by registering for export this year.

Labour
The ATGA team has put a heavy focus on labour initiatives and preparing growers for their increased workforce requirements at harvest.

The extension team has dedicated a significant portion of their past six months to unpacking the process of becoming an approved employer, one that has by several accounts left growers stamped.

Recently, the Seasonal Worker Programme (SWP) and Pacific Labour

Article 2: August 2021, CEO/Chair report

COVER STORY

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24

ATGA CHAIR & CEO

Weathering the storm

News from our chair
As a grower, exporter, and labour hire provider, this harvest season has been a perfect storm of events. Thankfully, we are almost through the season, but it hasn't been without its tests.

There were some growers who were lucky to escape the full brunt of the mild weather, but even those up north with earlier seasons experienced challenges. I can't remember a year that my Cronson Seedless coloured as late as it did this year. I put that down to the milder season, and the humidity we experienced throughout January and February.

The lack of supply of labour means people are screaming for backpackers everywhere – in cotton, blueberries, there is so much choice. Those jobs would normally have to be fought for. If you applied for a job in cotton you'd have to compete with 3000 backpackers.

Now, there simply aren't enough to go around, and competition from other industries has had an effect. I have paid my workers a good hourly rate, but they're still ready to go elsewhere because the season's nearly at an end – even though we'll need workers for pruning.

However, looking forward, I hope chemical and fertiliser supply will get back into a pattern, and everything in short supply will ease up before we move into next season.

News from our CEO
Unusual weather conditions, Covid, and seasonal labour have led to an unexpected and very challenging season.

Talking to growers and exporters, everyone has been faced with different circumstances that have significantly impacted the current harvest season.

Covid has been a catalyst for many of these challenges. It's no secret that the increasing cost of containers, treated pallets and freight shipping logistics have proved difficult for all exporters and growers.

The seasonal harvest labour force is still a major worry for most growers, with estimates the industry has been short of labour by 50 per cent of its normal requirement.

Of the workers available, many are picking and choosing which property to go to and what they will harvest.

The ATGA has invested a great deal of capital resources in attempting to attract seasonal workers, providing resources for seasonal workers and hosting regular meetings with harvest labour providers, stakeholders, and the Victorian Government.

One of the priorities the ATGA has been pushing with state and federal bodies is the regulation of labour hire contractors (BHCs). Until governments get together to have uniform regulations for how LHCs operate, then issues with labour supply will continue to surface and be problematic for growers. Let's hope the governments act on this soon.

The Federal Government recently made a positive economic case, with news that one country had finally signed on to the new Australian Agriculture Visa (Ag Visa). However, that has been of no benefit to the industry this year and there is still a great deal of uncertainty around the successful implementation of the Ag Visa going forward. It is definitely something our industry cannot rely on going forward until there are more tangible economic benefits.

The climatic conditions this year have also not helped, with very cool weather during spring and very little sunlight. Maturity sampling and retailer data, collected as part of the ATGA maturity project, along with a consensus of opinion, show this season's late maturation, slow colouring and berry softness is likely related to these climatic conditions.

Late maturing of grapes in all regions meant consumer acceptability of grapes declined to worrying levels, where 50 per cent of consumers were not reporting within 12 weeks of a poor eating experience. Let's hope this has been one-off occurrence and the industry regains its status in the coming years. You can read more the maturity project updates on pages 14-15.

ATGA Australian Table Grape Association Inc.

Jeremy Boyd | Chair

Jeff Scott | CEO

18 VINE MAGAZINE

Article 8: May 2022: CEO report: season update

INSIGHTS

Table grape trade insights

Interim trade insights for the 2021/22 season.

TOP 10 COUNTRIES BY TONNAGE EXPORTED
(% DENOTES EXPORT PERFORMANCE OVER SAME PERIOD LAST YEAR)
(M% DENOTES PREVIOUS YEAR MARKET SHARE)

DESTINATION COUNTRY	PCP	YTD	C%	M%
CHINA	48,571	22,814	-53%	47.25%
INDONESIA	13,455	13,497	0%	14.93%
JAPAN	6,080	5,170	-15%	8.51%
PHILIPPINES	6,002	4,275	-29%	7.20%
VIETNAM	5,290	8,154	54%	6.18%
THAILAND	4,888	4,320	-12%	5.60%
KOREA	4,504	4,019	-11%	4.00%
NEW ZEALAND	2,060	2,697	31%	2.77%
SINGAPORE	1,538	1,550	1%	1.87%
MALAYSIA	1,500	1,444	-9%	1.70%
TOTAL	93,979	67,940	-28%	100%

TABLE GRAPE EXPORT DATA AS AT APRIL 2022

TONNAGE EXPORTED LAST YEAR
121,352 t

THIS YEAR SO FAR...
72,000 t

CURRENT YEAR BY STATE:

- WA 894t (6% 79%)
- SA 11,141t
- NSW 53,261t
- VIC 64,929t
- QLD 558t

THIS TIME LAST YEAR VS THIS YEAR (tonnes)

- Jan - 7% / 4%
- Feb - 24% / 13%
- March - 49% / 38%
- April - 34% / 19% (so far)

by state

18 VINE MAGAZINE

Article 9: May 2022: Table grape trade insights

ATGA CEO

Hope for a budding future

News from our CEO
It feels like growers were just pruning, but buds will emerge soon and a new season will be upon us.

Last season was difficult and challenging for everyone, by most accounts. The challenges faced by all can be attributed to several factors, but none more so than the lingering effects of the pandemic.

Internationally, China had lockdowns in Shanghai and Beijing – during the most important period of the harvest – and all other countries had restricted movements, which we could argue led to lack of consumer confidence and spending. Importers were, simply, not at the confident level they were pre-Covid.

Climatic conditions did not help, with overcast and humid times during critical growth periods, compounded by two bouts of La Niña. This was a major contributing factor to the quality of fruit produced this year and the belatedness of harvest, compared to previous years. There is some uncertainty with recent La Niña predictions for the next season. However, with a 50-50 chance, we hope weather patterns are in our favour, and the industry can look forward to next season's harvest with some amount of confidence.

Markets
The ATGA has increased its communication with the Australian Government about improving access into the United States and Japan.

At a recent bilateral meeting between Australia, the Japan Importers Association, and the Japanese government, it was pleasing to hear that Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) expects to conclude its work on matters by October. It should then commence work on Australia's next priority for access, which is set to be additional varietal access for table grapes and citrus.

Japanese importers suggest they would like the next priority to safety be table grapes, which is good news for the industry. While it is difficult to put timelines on the conclusion of these activities, assuming no unforeseen circumstances, I hope these negotiations will conclude between Australia and Japan by December 2022.

The ATGA has engaged the US embassy in Australia to hasten a response from the United States Department of Agriculture (USDA) for improved access to the US. Let's hope Australia gets a response from them soon.

Fruit fly
A number of workshops have been held in recent months concerning fruit fly activity. Recent outbreaks in the Riverland have become more frequent and there is a fear that it may move to the Free Area status. This will have an impact on the way fruit is exported from the Riverland. There is also the concern of the odd Mediterranean fruit fly (Medfly) outbreaks in Adelaide.

All western states in Australia are deemed Medfly free, and it is important that the state governments continue their surveillance programs on Medfly.

Several protocols rely on the East/West conditions for fruit fly. The West is free of Qfly and the East free of Medfly. This status needs to be maintained. So, it is a timely reminder that all growers should be vigilant for Qfly in their vineyards. The extension team is on hand if you need support or advice on bait spraying and trapping for Qfly on your property. In autumn, recent numbers of Qfly were detected in traps in Sanjaya, due to abnormally humid conditions. While Qfly numbers fell over the cold winter, they're expected to increase during spring with the warmer weather. You can read more about fruit fly on pages 31-33.

ATGA Australian Table Grape Association Inc.

Jeff Scott | CEO

12 VINE MAGAZINE

Article 10: August 2022: CEO report: Market update

TABLE GRAPE NEWS

Promise against misfortune

Exports held strong across the 2021/22 season, despite several challenges faced both on the home front and internationally.

Australian Table Grape Association CEO Jeff Scott said it was pleasing to see export results like this despite the challenges on all fronts.

China's 30 per cent to 26,801 tonnes for a market share of 24.2 per cent.

Exports to Vietnam increased 95 per cent, from 7018 tonnes to 13,699 tonnes (and a 120 per cent increase on value, from \$34.54m to \$72m).

Other highlights from the preliminary Australian Bureau of Statistics (ABS) results released to the ATGA in late July include:

- a 69 per cent increase in export tonnage to Singapore and Bangladesh
- 45 per cent increase in exports to Taiwan
- 35 per cent increase in exports to Malaysia
- 25 per cent increase in volume to both Thailand and New Zealand

Positively, price per kilogram stayed strong, increasing from \$3.82 for the 2020/21 season to \$4.06 for 2021/22.

WHO'S BUYING MY FRUIT?

China 24.5%

- Indonesia 18.3%
- Vietnam 12.4%
- Japan 8.8%
- Philippines 7.7%
- Thailand 7.1%
- Sth Korea 3.7%
- Home 3.6%
- NZ 3.4%
- Singapore 3.4%
- Malaysia 2.8%
- Taiwan 1.8%
- UAE 1.4%
- Bangladesh 0.6%
- Qatar 0.3%
- Fiji 0.2%
- New Caledonia 0.2%

18 VINE MAGAZINE

Article 11: August 2022: Full season trade insights

NEWS

Shocks, price surges and supply issues

Disruptions and elevated costs are set to continue for the global shipping sector.

Shipping on face challenges are expected to continue for at least another year, despite a flicker of light at the end of the container.

According to Rabobank's Global Ocean Freight Outlook report, while global container freight prices are set to continue to gradually decline over the coming 12 months – from the outrageous highs reached last year – they are not expected to return to pre-pandemic lows.

The shipping industry has been impacted by wider influences, including weaker global economy and consumer confidence, higher operational costs, geopolitical uncertainties and imbalanced trade flows.

These 'shock' (WSC) the World Shipping Council (WSC) identifies, have been unprecedented – but there is a glimmer of hope for exporters.

The WSC predicts that this situation will normalise once consumer demand stabilises and new containers enter the market – a 4 per cent increase in vessel capacity is expected for 2023.

While the end might be in sight, it's been a hard slog for exporters, says the Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE). "Southern Hemisphere producers estimate an increase of costs by 3.8 billion USD through the increase of container prices by around 150 per cent for 2022," SHAFFE said in a July declaration.

"While the sector demonstrated its resilience during the past two years of the COVID pandemic, the current global supply chain challenges have been leading to cascading negative effects for all parts of the industry.

"The sector has experienced increased costs in multiple areas including: 150-400% in container prices; 20% in truck transportation up to 80% in airfreight, up to 100% in up to 100% in fertilizer

costs and up to 100% in wood pallets prices."

While the record-breaking rates for shipping have begun to soften, the Rabobank report stated, and "spot rates having retreated from irrational high levels in Q4 2021 – they remain three to five times above pre-2020 levels.

Long-term contract rates have also risen significantly and remain elevated, it said.

The WSC has underlined that it isn't a quick fix – as even with greater capacity the 'traffic jams' will still exist. ☹



20 VINE MAGAZINE

ATGA CHAIR & CEO

Welcoming change

A note from our Chair: I recently attended an eye-opening tour of India with the ATGA, visiting several cities, markets and cold store facilities.

The experience was so worthwhile and I gained great insight into the export scope and opportunities for Australian producers.

The gap between supermarket types is unlike in Australia. While there are a lot more 'wet markets', traditional supermarkets are getting more traction, with high-end retailers developing.

Australian table grape producers, because of high production costs, need to aim for those high-end markets.

We would need to test the market with small volumes and build on that. It would be a slow burn, certainly not a quick fix for market diversification, but there is hope.

As for my product line year, the call all has made the views look good. They're growing vigorously – I hope they slow down a bit before flowering. I have some growers in the north and across Queensland have been impacted by downy mildew – I hope the rain eases from now and we see some positive conditions.

News from our CEO

Another season, another La Niña. Last season many believed the wet and humid weather impacted grape quality and maturity and we hope this year isn't a repeat.

Queensland has had some rainfall to date, but not the amount predicted.

Although it's early in the season, there have been some warm sunny days to promote growth. The same cannot be said for Queensland growers, unfortunately, with rain coming at the wrong time and causing some concerns for growers in the north. The good news is the rain came after flowering. In Western Australia, positively, all seems to be on track at this stage.

Hort Innovation is undertaking a review and refresh of its strategy, reviewing and reassessing their relationships with all peak industry bodies.

The ATGA has the opportunity to work with Hort Innovation to assist with levy investment decision-making. The Strategic Investment Advisory Panel is under review, which would allow the ATGA greater say. Hort Innovation has also changed the process for deciding marketing levy spend.

The table grape international marketing program set for tender, and the ATGA is responding to the invitation. If the ATGA is successful we believe we could target promotional activities and receive greater value for levy paper spend.

After raising concerns about the repetition of export and quality audits, our voice has finally been heard.

Recently the Federal Government announced they will not audit duplicate elements from certification bodies (e.g. GLOBAL.G.A.P., Freshcare, HANPS) if growers have evidence of pack house certification.

Freshcare and HANPS have also said they will streamline their processes to minimise duplication. While this could be better, these changes will hopefully reduce inconvenience to growers. For these organisations to meet and recognise that there is duplication in their certifications, and streamline their processes, is a welcomed change.

We're looking forward to the Korean inspection's arrival in late November/early December. The inspector will conduct annual verification audits on Sanjaya properties and also visit Munduberra farms for the first time, so early season growers in the north can export to Korea in November/December.

The ATGA extension team has been very busy lately with workshops, trials, grower visits and vine sample collection. Recently African conducted some successful workshops on in-vine application, which provided useful insight into spray coverage and calibration.

The ATGA has also released some video content for growers and will continue to produce more on topics of relevance. I encourage everyone to attend future workshops and engage with our communications content. ☹



18 VINE MAGAZINE

Article 12: August 2022: Shipping insights

Article 13: November 2022: CEO report

ATGA NEWS

Trade optimism despite delayed season

News from our CEO: This harvest season has been another challenging year for everyone.

Climatic conditions have impacted several growing regions again this year. Queensland has been hit with a lot of rain at the wrong time, and this led to some losses with gaining maturity in the fruit.

Like last year, grapes were slow to reach the optimum maturity standard and at the same time had low acid levels. So, while the fruit may have had low brix, it was still edible, but the taste was bland.

Hot weather in Queensland has certainly helped the growth stages of the fruit, but by all accounts, harvest is around three weeks later than what growers say is a normal year.

Domestic prices for this time of the year have been strong, which has affected the volume of exports in January. Exports are expected to pick up from February onwards.

China is now out of lockdown, and this will support continued volumes being sent there and hopefully consumer confidence returns to what we have expected prior to Covid.

Other export countries are expected to want the same volumes as last year, with growth countries being Vietnam, Thailand and the Philippines.

The ATGA has started promoting to Japanese importers that additional varieties are just around the corner, with the expectation the 2024 harvest season will see full varietal access into Japan.

The USA is still a work in progress to improve bilateral trading with the Department of Agriculture. Fisheries and Forestry in sourcing the information requirements to be sent back to the USA for assessment.

Currently we have New Zealand inspectors in Queensland conducting pre-shipment inspections after the SO2/CO2 fumigation. They arrived on 23 January and stay for three weeks before going home and then replaced by another for three weeks at a time.

In December, the Korean inspector conducted the annual audit with all sites, choosing Munduberra farms, as they had not previously been to Queensland. The impact for export two days assessing all facilities and farm practices and procedures. Pleasantly, the Korean inspector was impressed with everything observed as assessed, which allows everyone to export to Korea for this export season.

Japan has left and I will conduct annual audit assessments in late March, with international auditors visiting Queensland and auditing selected farms, as well as DAFF procedures regarding Japan.

Growers need to be aware of the potential fruit fly numbers in the vineyards this season. The weather has been conducive to increased numbers of fruit fly. The advice from Fruit Fly Maturity Survey is that the volume of flies being trapped so far is exceeding other years. Be diligent in maintaining your sprays and trap surveillance and take action if fruit fly is detected near or on your farm. Read more on page 33.

In other biosecurity news, Hort Innovation recently announced an \$8.7M investment to trial tree inoculations that protect Australia's horticulture industries against the deadly Xylella and Huanglongbing (HLB) diseases.

Table grapes will be one of the horticultural products in the research project, due to the risk to industry of Xylella and its associated exotic vectors.

The project will be delivered through Hort Innovation and led by the US-based agricultural biotechnology company Silver Biologics alongside the University of Queensland.

The trial will employ a method developed by Silver Biologics to inoculate trees, vines and bushes against diseases. The researchers will combine this technology with elements of BioKey to improve how trees are inoculated. Xylella is of great importance to table grapes, as it has the ability to scarify and weaken leaves, eventually causing the tree to die.

Instead of hearing from the ATGA chair on this page, we spoke to Jeremy Boyd and other grower representatives about season challenges, remaining positive, and connection. As an industry, it's important to reach out if you or someone you know is having a tough time. Read more on p. 22. ☹



14 VINE MAGAZINE

ATGA NEWS

High price for catching prices

From the chair: I'm more than halfway through harvest, but by the time this edition prints, I hope the season has almost wrapped.

Markets, as Jeff will discuss, would have benefited from an earlier season finish, and there have been some market issues regarding immature fruit.

Since earlier in the year, production was a lot better than we expected, and for that I'm grateful.

One thing I did learn was that reaching out has allowed me to deal with challenges in different ways, and that has been a good lesson learnt.

At the end of the day this season has been eye-opening, and that's not just for me but for many growers. There are market issues that we will need to address in time, as Jeff mentions, and the maturity situation will not end well if we're all working against each other.

I know it was a challenging season and I've felt the brunt of that too, but we need to work together to ensure that we all get the best returns for the hard work we put in daily.

News from the CEO: Sunraysia's export season 3-4 week delay created many challenges.

A lot of fruit has landed in markets at

the same time – from Australia, but also competitors like Peru and Chile. Australia's reputation of being a supplier of mature, fresh and safe fruit has been the promotional difference between Australia and southern hemisphere competitors for years now, and why importers have previously paid a higher price for our fruit. In the past a glance at the Guangzhou market report would show that Australian fruit was receiving a higher price and moving quickly – unfortunately this isn't the case this year.

Separately but related, several concerned growers have approached the ATGA because they're hearing that a lot of Australian fruit arriving in overseas countries is not to the expected maturity standard.

They ask: "How can a grower/my neighbor be picking fruit when I'm still two weeks away from reaching the optimum maturity standard? I'm waiting to pick my fruit until I know it's at its best, but I'm frustrated that a grower who picks early in harvesting the Australian reputation built up over the past many years?"

The ATGA embarked on its table grape maturity program six years ago, working with retail chains and suppliers to the supermarket to address issues like this domestically. We implemented a minimum maturity standard (MMG) in 2016, and achieved more than 80 per cent consumer acceptability in 2020, followed by a clear result in 2021.

Major retailers accept the MMG and will reject consignments that don't meet specifications. They might not be legislated as the standards in Western Australia, but they are adhered to.

Many monitoring takes place on a weekly basis, from the retail chains' distributor contracts to random shelf sampling in super markets – and these results are conveyed to all parties.

This process doesn't exist for export. This concern about sending immature fruit to market must be addressed. We need a strategy on how to capture maturity levels of export fruit and report results back to growers and exporters.

For example, the ATGA has investigated sampling all arrivals of fruit into China for maturity and presentation – given it's the largest market, receiving 45 per cent of exported fruit – and these results would be published in additional columns in the China market reports and distributed to everyone. These results could then be analysed, looking at maturity and presentation compared with price received and movement. If poor quality low maturity fruit is recorded with a low and slow movement, it paints a picture.

Sadly, though, immature fruit landing in the market is harming Australia's reputation and influencing the outcome of growers who have wanted to get optimal maturity before exporting. Short-term gains will lead to long-term pain for everyone. ☹



12 VINE MAGAZINE

Article 14: February 2023: CEO report: Optimistic start to season

Article 15: May 2023: CEO report looks at the high price of entering the market with

NEWS

Export season's silver linings

The Australian table grape season concluded on a positive note despite an ominous early season.

Australian domestic and export sales for 2023 made a marked recovery on the previous two years, despite climatic events that affected producers in several growing regions and impacted optimal seasonal timing.

Table grape export volumes increased by 20,000 tonnes to more than 190,000 tonnes – worth more than \$570 million – lower than the industry's pre-Covid peak, but an improvement on the past two seasons and the third highest result in the past 10 years.

Australian Table Grape Association CEO Jeff Scott said producers had endured several tests this season, but overall finished positively.

"In November and December, weather events brought rain, hail and flooding to Sunraysia and Queensland," Mr Scott said.

"This year required strategic pest and disease management. Growers were tested – even some of the most seasoned growers experienced challenges that they had never seen. Positively though, exports recovered from a couple of low years despite the initial challenges, and the year ended more positively than expected."

Unfortunately, the 3-4-week harvest delay – brought on by slow maturation and colouring – created some market resistance.

"While the early season fruit was absorbed by the domestic market, many of the mid- and late-season varieties reached maturity at the same time and were harvested at once," Jeff said.

This overabundance of fruit led to a glut in some markets, however, others recovered well after a low year.

China exports lifted to around 40 per cent market share – from 26 per cent last year – Indonesia received more than 16 per cent of export product, and Vietnam held strong at 10 per cent.

Producers and exporters are hopeful for a more stable production year, with climatic conditions expected to return to normal.

ABARES predicted in its June 2023 Agricultural Outlook that horticultural production and exports will rise, given higher production volumes and increased demand.

According to ABARES, drier climatic conditions similar to 2019-20 are expected to be alleviated by soil moisture stores from the wet 2022-23 season.

Jeff said there were also market improvements and protocol changes to key markets anticipated over the next few seasons.

"We're working with the federal and overseas governments to allow irradiation for Thailand and the Philippines," Jeff said.

"This would expand air freight capacity to these two countries and allow for smaller volumes of heavier varieties in-market."

"We're also still hopeful for full varietal access in Japan, and changes to the protocol in the United States, which would open up a lot of avenues for exports, but it's unlikely these negotiations will be finalised before the 2023-24 season."



8 VINE MAGAZINE

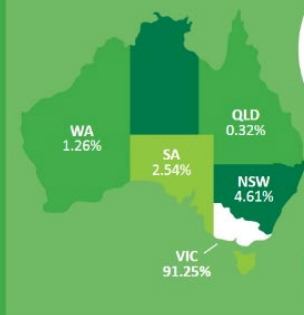
NEWS

Export season's silver linings

TOP 10 COUNTRIES BY TONNAGE

Country	2023	2022	Percentage change	Market share
China	51,330	28,540	80%	41.3%
Indonesia	22,891	20,116	14%	18.4%
Vietnam	13,262.5	13,326.8	0%	10.7%
Philippines	8,598.5	8,553.3	1%	6.9%
Thailand	7,279.6	7,933.4	-8%	5.9%
Japan	6,270.5	8,916.4	-30%	5.0%
New Zealand	4,006.9	3,845.4	5%	3.2%
Malaysia	3,909.9	2,728.7	43%	3.1%
Singapore	3,371.8	3,323.4	1%	2.7%
Korea	3,288.7	4,306.1	-24%	2.6%

EXPORT MARKET SHARE BY STATE



Container count peaked the week of 20 March (week 12) with 698 containers (13,000 tonnes) on sea (compared with last year's peak of 507 the week of 28 March (week 13)).

96% by sea

4% by air

10 VINE MAGAZINE

Article 16: August 2023: Lead story: Export

TRADE AND MARKETING

Trade show anticipation

INDUSTRY PREPARES FOR AFL

Around 600 exhibitors from 40 different countries will converge on Hong Kong in September for Asia's leading fresh produce trade show.

Asia Fruit Logistica (AFL) will return to Hong Kong's Jockey Club after being held in Bangkok in 2022, where the first-ever AFL was held 16 years ago.

The Australian Table Grape Association (ATGA) will feature as part of the Hort Innovation Grow in Good Nature stand.

ATGA CEO Jeff Scott said table grapes would have a dedicated section of the stand and exporters could access a private interview room.

The premier fresh fruit and vegetable event had been a compulsory addition to exporters' calendars before Covid hit, with the 2020 event held virtually, 2021 event cancelled and 2022 impacted by China's continued travel restrictions.

Australia's leading managing director Joe Tallo said he was looking forward to the event.

"We think it will be a substantial turnout, the vibe is positive as Covid is now well behind us," Joe said.

"Hong Kong is a great location for Asians and Westerners to come together. We find exhibiting at the show is beneficial as we meet face to face with our existing customers and meet new customers, suppliers worldwide."

"We share information and it gives us a great opportunity to showcase our offering. Australia's leading fresh fruit and vegetable event had been a compulsory addition to exporters' calendars before Covid hit, with the 2020 event held virtually, 2021 event cancelled and 2022 impacted by China's continued travel restrictions."

According to AFL, Australia, USA, New Zealand and Egypt will have a prominent presence on the show floor, while 24 national or regional pavilions will adorn the exhibition space.

Visitors to the show will be able to explore a wide range of agtech, from automation and sorting technology through to packing and processing, IT solutions and POS equipment, as well as smart agriculture.

Joe said there was a buzz beginning to generate for the season, with growing conditions expected to improve.

"We believe it will be a dry hot growing season which normally indicates sweet fruit, which the market likes, and is what Australia predominantly is known for – good tasting fruit," Joe said.

"Together with our grower base we are relatively excited for the coming season. They have good volumes of all the modern varieties."



16 VINE MAGAZINE

Article 17: August 2023: Trade show

ATGA NEWS

Industry victories

From the chair

A growing season is never complete without some challenges, and this year, one thing I'd like to recognise is the lighter crop growers are reporting.

Across the board I'm hearing from growers that crop loads are down on last year.

The vines themselves are looking fantastic, but this year's bud fertility has been affected by last year's cold and cloudy days.

While this does affect us, and it can be disappointing to think about what that means comes harvest, I think it's important to try to remain positive. The lighter crops will likely mean improved outcomes, potentially, on last year.

Hopfully with a lighter crop, we should have no issues getting full colour and nice, sweet produce. And less crop could mean less work in the vines.

It is a balance.

With labour looking the best it has in five years, in my case at least, and water availability currently positive – with good allocations and temporary prices going down – I am hopeful we'll all have a good season!

News from the CEO

The Australian Table Grape Association (ATGA) has recently had some collective wins for industry.

In October, ATGA secured the tender for the 2023/24 international promotional campaign, a monumental achievement for industry – a victory not just for the ATGA, but for every grower and exporter. This program will allow us the autonomy to lead and execute promotional activities in key and emerging Asian markets. Read more on pages 14-15.

Building on this momentum, we were also awarded a separate tender to guarantee our strategic participation at trade shows during the year. Trade show representation offers immense potential for networking, learning, and showcasing our excellence.

These two programs will involve transparency and inclusiveness and support a two-way flow of information between the ATGA and growers and exporters, and we extend an invitation for advice, suggestions, and feedback to ensure they meet industry needs.

On another export-related front, ATGA is contemplating the establishment of a ground-breaking exporter registration process for those dealing in Australian table grapes. This initiative has been a topic of discussion with the Department of Agriculture, Fisheries and Forestry (DAFF) for several years, pending technological upgrades and legislative changes. We have now received encouraging signals from DAFF that these pre-requisites are nearing completion, paving the way for us to proceed.

In collaboration with DAFF, we envision the exporter registration as a seamless extension of our existing grower registration system. Exporter registration would not only create a framework for industry exports, but empower both growers who export and exporters with a plethora of resources, benefits, and support.

In our discussions with DAFF, we have placed a strong emphasis on the need for advanced market intelligence and data-driven decision-making. A critical component of this case push for the recording of export lot numbers and expected time of arrivals for shipments, adding to existing data collection on fruit volume and destination.

This important industry advancement would be a game-changer, equipping both growers and exporters with the strategic insights needed to navigate the market, optimise operations, and maximise success.

A comprehensive package detailing the particulars of becoming a registered exporter with the ATGA is being developed as we speak.





Jeremy Boyd | Chair

Jeff Scott | CEO

10 VINE MAGAZINE

Article 18: November 2023: CEO report on

INSIGHTS

Table grape investment snapshot 2022/23

Want to know how table grape levy funds were invested in 2022/23?
This snapshot, recreated from Hort Innovation's 2022/23 Annual Report, shows some of the highlights from the table grape levy investments across the 2022/23 financial year.

\$1,861,402
Invested in R&D

\$1,165,545
Invested in marketing

\$1,743,903
In levies collected by the government and passed on to Hort Innovation for investment

HERE ARE SOME OF THE INVESTMENT HIGHLIGHTS DELIVERED DURING THE YEAR:

- A renewed industry communications program, delivering the Vine, Peel of the Ranch, social media updates, events, videos and content for the industry website tablegrape.com.au
- An industry extension program to support the adoption of industry best practice and new technologies for table grape growers.
- Efforts to help table grape growers adopt the minimum maturity standards through working closely with growers, wholesalers and supermarkets.
- Maintaining and improving market access for the table grape industry through a trade development program.
- Updates to the table grape Harvest to Go dashboard, providing regular household purchase data and insight reporting.
- Delivery of the Strategic Agrichemical Review Process (SARP) which provides an updated view of current priorities and gaps regarding pest, disease and weed control.
- Access to consumer insights through multi-industry investments.

28 VINE MAGAZINE

Article 19: November 2023 Investment

TABLE GRAPE NEWS

Global glance

As Australia's table grape export season continues, it's interesting to look at how Australia is shaping up against its southern hemisphere competitors.

South Africa
A recent crop estimate from the South African Table Grape Industry (SATI) projected a total of 25.8 million cartons of export production (roughly 345,000 tonnes), an increase of 16 per cent on last year. The South African table grape industry is at its peak picking and export weeks. About 2000 containers need to be exported weekly for the next few weeks, before volumes start tapering down. While South Africa's largest export markets remain the EU (35 per cent) and the United Kingdom (20 per cent), other export markets are gaining ground. The Middle East (7 per cent), Canada (5 per cent) and Southeast Asia (5 per cent) all displayed an increase in exports between the 20/21 and 2022/23 seasons. SATI also reported that growth in China had declined and "may even be contracting". There has been less product shipped from Peru this season, as well. It reported Chile's SATI said, there is less volume in the market and prices are lower than last year.

Peru
Peru exported its dominance of global table grape exports last season, exporting 293,000 tonnes. The current season, which runs from October to April, began early due to weather conditions and early ripening. While reports early in the season identified the current season would have the same trajectory of last year's, members of the Peruvian Association of Table Grape Producers said that lower productivity due to weather phenomena should be expected. Optimistic reports, the general manager of Exportadora Safco Perú said, derived from the earlier season, but that particularly in the northern region of Peru would be more affected. Peru packed 87 per cent of its original estimate on white, 88 per cent red and 50 per cent black seedless up until Week 03, 2024. It is expected that a 10-15 per cent lower than anticipated volume of 18.4 million cartons will be realized. The total planting area for table grapes in Peru is estimated at 35,000 hectares, with Ica and Piura being major producing regions. While the United States is positioned as the leading market, representing 40.7% of the total and an increase of 27.3 per cent, other markets such as the Netherlands, United Kingdom, Mexico and Canada fill out the top five. Notably, Peru gained access to Japan in 2023.

Chile
The 2023/24 table grape season in Chile has been unfolding against the "backdrop of optimism and challenges, emphasizing the industry's adaptability in the face of evolving dynamics", according to Chile's Uvovino Magazine. While export volumes are expected to exceed 63 million boxes (33 per cent more than the 2022/23 season), with newer varieties set to represent more than 60 per cent. The project comprises 24.8 million boxes of red seedless, 22.5 million boxes of white seedless, 18.1 million boxes of Red Globe, and 40 million boxes of black seedless grapes. The Chilean table grape industry is facing similar challenges to Australia, regarding varietal replacement, water scarcity and financial constraints. There is also intensified competition from Peru in export markets. Uvovino vice president said in Fresh Fruit Portal that it was urgent these challenges were addressed, and emphasised the importance of continued dialogue about water availability, climate change impacts and varietal replacement initiatives. The season runs from December to May.

Source:
<https://www.freshfruitportal.com/news/2024/03/06/2024-24-table-grape-season/>
<https://www.freshfruitportal.com/news/2024/03/06/table-grapes-peru-volume-drop-the-season/>
<https://www.freshfruitportal.com/news/2024/03/06/chile-table-grape-off-2024-crop-estimate/>
<https://www.freshfruitportal.com/news/2024/03/06/chile-table-grape-off-2024-crop-estimate/>
<https://www.freshfruitportal.com/news/2024/03/06/chile-table-grape-off-2024-crop-estimate/>

18 VINE MAGAZINE

Article 21: February 2024: Global glance at international markets

ATGA CEO

Jumping the gun on maturity

News from the CEO
Harvest is in full swing across Sunraysia and the Swan Valley, and every year, at the commencement of harvest, I get the same types of calls.

These calls are from growers, concerned that others are allegedly harvesting too early – prior to the grapes reaching their optimum maturity.

The Australian Table Grape Association (ATGA) has had national minimum maturity standards in place since 2019 for growers to adhere to. While the maturity project has not continued this year, these standards still apply. The national minimum maturity standards were adopted after testing thousands of grapes, and we know that to achieve the best eating quality we must have 90 per cent of representative grapes in a sample reach 16 Drie. By maintaining this minimum maturity, it enables the consumer to get the best eating experience on first purchase. We have extensive evidence from the past five years of the maturity project to demonstrate that a poor eating experience at first purchase means the consumer does not return to that fruit category for a minimum of six weeks.

So why send fruit to the market when you know it is below the minimum standard of acceptability? By supplying immature fruit to the market you are damaging not only your own reputation but the industry's as well.

Peru, Chile and South Africa are all improving their growing practices to the point they are now capable of producing the same quality fruit as Australia.

If we continue to "jump the gun" and supply poor quality fruit our reputation will sink even further where the retailers that we expect to receive will no longer be an offer. In our 20 years of the Vine celebration, we highlight a story about maturity and how industry is finally coming around to the idea that they shouldn't send over grapes to market. That was from 2006 – 10 years ago! – and we still have issues now. We must do better.

Trade progress on horizon
On a more positive note, there have been some good media reports out of Japan that MAFF is considering the market improvement request for additional varieties, and that a decision is on the horizon. While there has been no official word from MAFF, only independent reports, MAFF has posed some questions to the Australian Department of Agriculture, Fisheries and Forestry (DAFF) and ATGA, which I have answered. MAFF and DAFF are due to meet for a bilateral meeting in March, so I hope to have further news then.

Hort Innovation is back on in early March and ATGA will be flying the flag for Australian table grapes. We'll also attend an international networking session with the Victorian Government's trade facilitation agency, Global Victoria, in Tokyo. This will be a prime opportunity to discuss varietal access. Based on the expectation that we will have a green light for the 2024/25 export season, I will be looking to organise a special outbound trade mission to Japan. The mission would include visits to major retailers and importers and one-on-one networking opportunities. Pending a good response come March, we will open expressions of interest for growers and exporters in April/May to travel around July or August.

Hort Innovation TABLE GRAPE FUND

ATGA
Australian Table Grape Association Inc.

Jeff Scott | CEO

14 VINE MAGAZINE

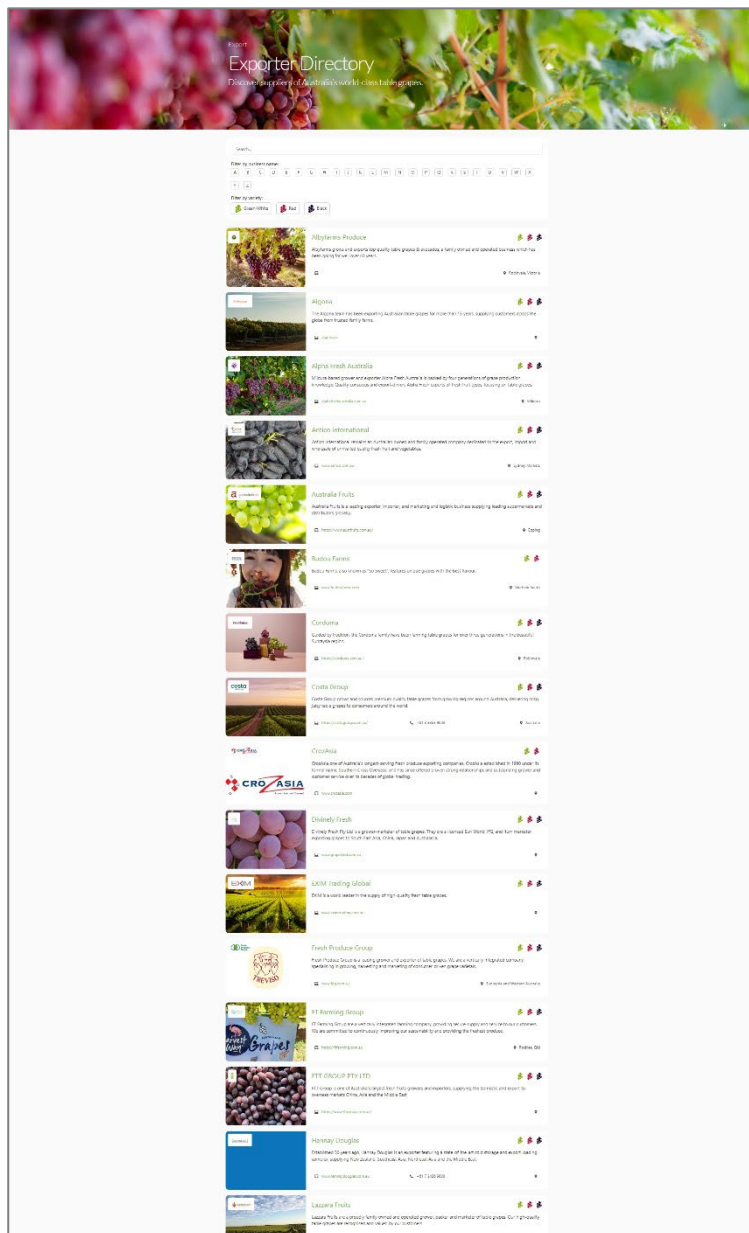
Article 20: February 2024: CEO report on the effects of immature fruit in market

Appendix 9 New Zealand Inspectors





Appendix 10 Extract of the Exporter Directory

Screenshot of current interactive *Exporter Directory*



Top: Australian Grapes postcard, QR code on reverse side.

Bottom: QR code links to landing page with buttons relevant to international customers (varieties, *Exporter Directory*, availability, growing regions).

Appendix 11 Trade Shows
Asia Fruit Logistica



China International Import Exhibition



Appendix 12 Inbound Trade Missions

