

ACROSS INDUSTRY

ANNUAL REPORT 07 | 08

ACROSS INDUSTRY PROGRAM ADDRESSES INDUSTRY AND GOVERNMENT PRIORITIES



Know-how for Horticulture™

The across industry program invests in projects that aim to provide wide benefit across the horticulture sector. Many of the projects funded would be difficult for industries to conduct on an individual basis. However, through this collaborative approach across all horticultural industries, major issues can be effectively addressed.

Recommendations on investment in the across industry program are made by the Industry Management Committee (IMC). The IMC is a subcommittee of HAL and its members consist of the CEOs (or equivalent) of the eight largest HAL member industries (based on HAL marketing and R&D income). At least one should be a B class member (i.e. no statutory levy). Committee membership is reviewed, amended and advised to industry at each HAL AGM based on the previous year's HAL income, effectively immediately following the AGM.

In 2007/08, HAL invested \$1,207,925 in R&D projects which address the across industry priorities and also align closely with the Government's R&D priorities.

Productivity and adding value

In the area of productivity and adding value, a project is continuing to improve the coordination of minor use permits across all horticultural industries. During 2007/08, over 102 permits have been issued across 18 different horticultural industries.

Another project is providing coordinated horticulture input to pesticide reviews, ensuring the industry needs are fully understood and considered in these processes.

Addressing labour issues, the program is supporting a joint initiative with the Australian Farm Institute to obtain an objective assessment of the current and projected future human resource needs of

the farm, farm-service and agribusiness sectors in Australia.

Supply chain and markets

The program provides resources to assist export market access via the HAL Horticulture Market Access Committee (HMAC) process. In consultation with industry, HMAC and the market access coordinator consider, prioritise, strategise, promote and communicate all export market access issues in relation to horticulture.

In the domestic market, the program is continuing to provide coordination of the national fruit and vegetable consumption campaign, based on Go for 2&5®.

Natural resource management

Three key projects have been addressing this area. Firstly, the Horticulture Water Initiative (HWI) which addresses national horticulture industry water issues such as the drought and the Government's National Water Plan. Over the past four years, the project has: maintained awareness of national water issues and their implications for horticulture; supported innovative approaches to efficient and environmentally responsible water use; provided relevant and up to date information on water issues to industry, and provided key information about horticulture and water to a variety of stakeholders.

The second project is the Horticulture Industry Environment Communication Plan which aims to demonstrate the positive environmental performance of the horticulture industry.

The third project is working to develop a toolkit of information sources to better equip industries to respond to peri-urban issues affecting horticulture industries.

Biosecurity

Although biosecurity is generally being addressed by individual industries through their own biosecurity planning, the program assisted with preparation of a submission to the Independent Quarantine and Biosecurity Review. This project enabled the industry to ensure that the quarantine and biosecurity concerns of the Australian horticultural industry are known by the review panel and the Australian Government via the review panel's report.

Climate variability and climate change

This is an area which is receiving increased attention and in 2007/08 two important projects were supported through the across industry program. One project, initiated in 2006, is undertaking a review and assessment of the impacts of climate change on the horticulture industry to position horticulture in an increasingly variable and changing climate and to make informed decisions on future research, development and extension.

The second initiative is in collaboration with all Rural Research and Development Corporations to support the National Climate Change Research Strategy for Primary Industries (CCRSPI), a joint initiative of Federal, state and territory governments, the CSIRO and the Rural RDCs, managed by Land & Water Australia (LWA).

This annual report presents a snapshot of the across industry projects supported during 2007/08.

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TOWARD BETTER MANAGEMENT OF FOOD SAFETY RISKS IN HORTICULTURAL PRODUCE

Food safety is a growing concern in the horticultural sector. Consumers rank food safety closely behind price and quality in their purchase decisions. At the same time, reported outbreaks of food-borne illness are increasing, along with consumer expectations of greater convenience, extended product shelf life and 'everything-everywhere-anytime' shopping.

Two projects in the across industry program are providing a platform for effective management of food safety risks in horticultural produce.

Incident Response Protocol

Project AH07033 is the development of an incident response protocol that can be used across all horticulture tailored to an individual industry sector or business. The protocol will enable the industry to address pathogen, pesticide residue or other contamination events resulting from fresh and processed horticultural produce in export and domestic markets. It will effectively be a template to determine who does what, where, when and how, starting with a process for determining whether you have a crisis or not.

This work builds on the involvement of industry, government, retailers, horticulture's informal food safety network, the horticulture market access committee – contaminant management committee, and others, as well as the national food industry and government initiative known as "Enhancing the safety and security of our food supply".

The protocol's roll-out will include

opportunity for industry involvement in awareness and training activity.

Phase 1, now complete, consolidated and reviewed existing HAL and industry documents and similar industry protocols developed overseas. It included a de-brief of previous incidents' occurrence and impact and the development of a risk assessment to identify the broad categories of risks the industry is exposed to and calculate their likelihood and business impact.

This phase was conducted through a series of one-on-one interviews, literature review and workshops. It concluded with the development of draft incident management plans and templates that:

- Integrate business continuity and disaster recovery plans.
- Identify a stakeholder management and communication strategy.
- Outline an incident response protocol.
- Provide case studies and templates for implementation across the industry.

Phase 2, scheduled for the coming months, involves a training program and desktop exercises to build knowledge of crisis management, testing and evaluating the draft plan and protocols, and developing skills in crisis and incident response.

Key outcomes expected of the project include:

- The development of a robust incident response process for the industry that uses intuitive decision making tools to contain a crisis or uncontained incident.
- Building awareness of roles,

responsibilities and escalation protocols.

- Practicing the responses to a multi-faceted incident in a short timeframe where decisions are made based on a limited range of facts and assumptions.

Contamination Management Issues Survey

The second project AH08011 is a survey to provide data on what supply chain participants and related government agency staff view as their current knowledge, attitudes and aspirations for contaminant management.

The survey results will provide input to the incident response protocol and industry and consumer communications. They will help develop strategies for industry training and development, identify gaps in information and possible R&D opportunities, and help create a partnership approach between government and industry.

The survey will also be used to measure the effectiveness of ongoing industry efforts to improve food safety outcomes.

Both are scheduled for completion by December 2008, after which a broader project to bring more elements of an industry-wide food safety strategy will commence.

Project AH07021 and AH07033

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MANAGING PESTICIDE ACCESS IN HORTICULTURE

A project to manage and facilitate industry's access to appropriate pesticides is now entering its second year.

Over recent months the project has provided strategic agrichemical review process (SARP) information to industry including:

- Brassica, carrot, onion, pea, bean and potato herbicides information to the Tasmanian vegetable industry.
- Western flower thrips control information to vegetable and strawberry industries.
- Silverleaf whitefly control information and new use strategies to Queensland DPI&F.
- Current pesticide uses in multiple horticulture crops to chemical manufacturers.

Many of the SARP reviews are still in review awaiting on feedback from industry and other stakeholders noting that the value of the SARPs conducted is largely as a result of the expert feedback during and from the SARP.

In addition:

- 16 urgent or renewal permit applications (for use in various vegetables, fruits and nuts) plus four consolidated permit renewal applications have been submitted to APVMA.
- 32 permits have been issued recently for

various horticulture crops.

- Four permits were not renewed or cancelled as use was either already registered or not required by industry.

Issues raised by APVMA in regard to permit submissions were addressed to ensure speedy approval of permits. This will include further training to our minor use service providers with the APVMA in November.

All permit information is distributed to all relevant industry participants as soon as the permit is issued. This includes chemical companies, resellers, grower groups, research and advisory services. A complete list of all horticultural permits was prepared and circulated to all relevant industry participants and is also available to anyone on request.

A new list of data generation and desk study projects in vegetable were prepared and contracted. Twenty five data generation projects (147 trials) were contracted out with completion expected by late 2009. Ten desktop projects, which included South Australian pesticide exemptions, were contracted and submitted to APVMA by late June 2008.

Additional data generation and desktop projects are proposed for later in 2008/09

addressing minor use needs in vegetable and other horticulture crops mostly identified through the relevant SARP.

Meetings and planning sessions were conducted on pest management issues, current permits, future permits and possible registrations. These were conducted with government departments, chemical manufacturers, horticultural industries and growers.

Key activities over the next four months of the project will be:

- Preparation of emergency and urgent horticulture permit applications as required.
- Consolidation of current, expiring and new permits across horticulture.
- Preparation of the necessary trial information for the next round of horticulture data generation and desktop project.
- Communication with all stakeholders on permit information.

Project MT07029

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EVALUATING NEW VARIETIES

A project to establish a framework to facilitate a best practice approach to evaluation strategies for varieties derived from Australian breeding projects or imported varieties was conducted during the year.

A workshop held on 5 March 2008 explored opportunities for developing best practice evaluation methodologies and supporting systems across horticulture identifying opportunities to progress to the next phase.

The workshop explored many dimensions of evaluation in horticulture, including agronomic, statistical, experimental design, climate, crop physiology and adaptation, rootstock interaction, the homo clime concept and performance prediction.

Attendees included researchers representative of a broad range of horticulture industries, experts from

relevant disciplines in other crops (e.g. grains, forestry and sugarcane) and commercial operators (growers, marketers, germplasm companies) from a cross-section of Australian horticulture industries.

Opportunities for implementation of systems support approaches to horticulture evaluation were discussed with benefits from this approach identified as: increased efficiency of HAL and individual crop programs, greater knowledge sharing, increased staff focus, increased confidence in results, opportunity for more efficient larger combined research projects to address generic problems, better succession planning and decreased risk of reliance on a single person to control information.

Strategies identified to progress the concept were:

- Education and raising awareness of researchers in the value of biometric and

quantitative genetic approaches.

- HAL funded across industry projects to support a biometrics position and review of available database systems.
- Development of research projects to support capacity building for the continued improvement of horticulture crops from the bottom up (excellence in crop evaluation, contemporary experimental design, statistical techniques and quantitative genetics).
- Development of an information accreditation system to validate data quality including data collected by growers.
- Support a position to offer advice on commercialisation and IP protection.

Project AH06012

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OUTCOME 1 ENHANCE THE EFFICIENCY, TRANSPARENCY, RESPONSIVENESS AND INTEGRITY OF THE SUPPLY CHAIN FOR THE TOTAL INDUSTRY TO PROVIDE CLEAR MARKET SIGNALS

ACCC INQUIRY INTO THE COMPETITIVENESS OF RETAIL PRICES FOR STANDARD GROCERIES

HAL has made submissions to the inquiry by the Australian Competition and Consumer Commission (ACCC) into retail grocery competition.

Australian horticultural producers have long-held concerns regarding allegations of disproportionate margins made by mid-chain players and retailers. Concerns about inadequate financial transparency along the supply chain led to the mandatory Horticulture Code of Conduct.

In January 2008 Government approval was given for the ACCC to conduct an inquiry into the competitiveness of retail prices for standard groceries, under Part VIIA of the Trade Practices Act 1974. After the inquiry a report was submitted in July 2008.

HAL made two submissions to the ACCC Inquiry. The first contained:

- A detailed profile of the Australian horticultural production sector.
- A detailed description of the Australian horticultural value chain.

- A brief commentary on the Produce and Grocery Industry Code of Conduct and the Mandatory Horticulture Code of Conduct.

The second HAL submission contained:

- Cost of production information for a range of horticultural crops.
- A description of the main factors influencing cost of production and growers' ability to pass on cost increases.
- A description of recent grower issues experienced doing business with major supermarket chains and the mid-chain participants.

Following its inquiry the ACCC found that:

- Grocery retailing is workably competitive, but there are factors that currently limit the level of price competition.
- Price competition is strongest on promotions of key value items (products known by the supermarkets to be used by consumers to assess value).

- ALDI has been a vigorous price competitor since its entry into Australia and has the incentive and ability to engage in sustained price competition.
- The majority of grocery price increases in Australia are attributable to factors such as supply and demand changes in international and domestic markets, increased costs of production and weather conditions.
- The ACCC has not identified anything fundamentally wrong with the grocery supply chain.
- Coles, Woolworths and Metcash have significant buyer power in relation to many packaged grocery products because many suppliers effectively have little option other than to deal with these buyers.

Project AH07030

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PESTICIDE REGULATION COORDINATOR KEEPS INDUSTRY ABREAST OF CHANGE

The regulatory environment for pesticides within which Australian horticulture has to function, is both complex and subject to continual change. Government policy changes in such areas as pesticide reviews can impact on industries in different ways.

Through this project growers and industries are better informed and can thereby better manage responses to regulatory activity on pesticides.

The project keeps industries aware of proposed regulatory changes and their potential impacts, and provides opportunities to respond to those changes when needed. The project seeks to provide a coordinated approach to information dissemination to growers and grower organisations, and industry responses to government.

To identify emerging issues the project co-ordinator developed linkages with regulators through direct liaison and via participation in various committees and forums.

The coordinator liaises directly with a range of industry participants including peak industry body representatives, growers and chemical manufacturers as well as participating in industry workshops and conferences. The aim is to ensure horticultural industries are given adequate information on proposed changes, and their potential implications, for consideration. This is to make certain that regulatory changes do not occur without there being adequate consultation.

The main achievements this year have included:

- Responses to the Productivity Commission review of chemical regulation and to the draft report on the control of chemicals of security concern.
- Responses to Australian Pesticides and Veterinary Medicines Authority (APVMA) on behalf of industry on current review chemicals including carbendazim, propiconazole, chlorpyrifos and carbaryl.

- Responses to the APVMA regarding trade implications of new registrations, including chlorantraniliprole and methoxyfenozide.
- Ongoing co-ordination of residue trial programs for dimethoate and fenthion.
- Submissions prepared on behalf of HAL, for dimethoate and buprofezin, to the joint meeting of the FAO Panel of Experts on Pesticide Residues.
- Responses provided to DAFF on behalf of industry in relation to WTO notifications on MRL changes in Taiwan, Korea, Indonesia and Hong Kong.
- Participation on the APVMA industry liaison committee, industry technical committee and Codex committee for pesticide residues.

Project AH04007

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OUTCOME 2 MAXIMISE THE BENEFITS OF HORTICULTURAL PRODUCTS IN THE EYES OF CONSUMERS, INFLUENCERS AND GOVERNMENT

WORKING TOGETHER TO PROMOTE THE HEALTH BENEFITS OF FRUIT AND VEGETABLES

The involvement of HAL with the Go for 2&5® campaign is based on the simple premise that a collaborative approach toward promoting the health benefits of fruits and vegetables, makes good business sense. Working with government and commercial bodies to promote fruits and vegetables allows industry to provide a community health benefit, while selling more product.

Importantly, the investment through the across industry program provides tangible evidence to government that industry is serious about playing its role in not just promoting the health benefits of fruits and vegetables, but in delivering real long-term community health benefits. There is little doubt that this involvement has partly been responsible for attracting and maintaining government investment in the campaign. It should be remembered that this cooperative approach has attracted upwards of \$15 million of government investment in the campaign over the past five years and encouraged strong government and non government partnerships.

From an industry viewpoint the fact that government has invested substantial funds to promote fruit and vegetables is unique, particularly as this approach is not mirrored in regard to other industry commodities.

In addition to this, the national sublicensing approach, managed through HAL, has allowed a range of other non government and commercial bodies to further leverage from these government activities and directly support the campaign message. The involvement of non government bodies

in promoting fruit and vegetables provides industry with additional benefit, putting in place additional activities at no additional cost to industry.

HAL member industries have the same opportunity to access campaign materials as other non government licencees. This access is provided through the central agreement between HAL and WA Health and allows campaign materials to be used by HAL members under an approval process to ensure compliance with campaign conditions.

Through his arrangement HAL members are able to co-brand printed campaign materials developed by state governments and use campaign characters or materials in support of industry promotional efforts. Given the impact of the Go for 2&5® campaign it provides industry members with an ideal opportunity to align with government and other bodies who are committed to this strong health message.

At a retail level sublicense agreements are in place with independent South Australian retailer the Chapley Group, national retailer Metcash IGA and with Foodland South Australia.

A collaborative approach has also been adopted with non government health bodies such as the Dietitians Association of Australia and the New South Wales Cancer Council.

Another sublicensee, the NSW School Canteen Association has worked with the NSW Cancer Council on the delivery of the

school based Crunch&Sip® initiative, with funding support provided through the New South Wales Health Department.

Another example is that of a Brisbane-based company specialising in home delivery of locally grown fresh produce. Farm Fresh Central has taken the innovative approach to integrate the Go for 2&5® message directly into its business, delivering meal solutions right to the customers door. Under this approach, customers not only receive the correct amount of fruit and vegetables to meet their 2&5® health requirements, but they also receive further encouragement with a weekly eating plan, easy to understand certain indicators and healthy eating tips to get more fruit and vegetables into their day.

The continued sublicensing of organisations such as these is in line with the long term objectives of the campaign, tapping into the skills and expertise of organisations that are able to widen the delivery of the campaign health message.

Continued support from government at a state and territory level, combined with support from industry, non government and commercial bodies will help to build strong collaborative partnerships and an even stronger long term campaign.

Project AH07006

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WELLBEING PROJECT SUPPORTS HORTICULTURE'S HEALTH CLAIMS

The 'wellbeing initiative' is assisting horticultural industries to take advantage of the increasing importance being placed on individual and community wellbeing by consumers, policy makers and other stakeholders.

The project is providing an umbrella capability delivering relevant expertise. It is monitoring and influencing the relevant regulatory environment. This is assisting individual industries to defend the reputation of horticultural production

and products from attack, and generally representing the interests of horticulture in relevant forums.

The project has represented the interests of horticulture in relation to the development of the new Food Standards Australia and New Zealand (FSANZ) regulation regarding nutrition, health and related claims.

Work has also commenced on the National Health & Medical Research Council (NHMRC) review of core food groups –

the dietary principles which underpin all governmental healthy eating advice in Australia. Subsequently the national dietary guidelines for Australians, will be reviewed and revised over the next 18 months.

Project AH07007

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COORDINATING PURSUIT OF MARKET ACCESS

Over the past 12 months, through the market access coordinator a number of activities have been undertaken aimed at improving market access outcomes.

This position supports the horticultural market access committee (HMAC) and achievement of the horticultural market access strategic plan objectives.

Activities include working for acceptable outcomes under the Doha Round through the Australian negotiators and by participation in the National Farmer's Federation agriculture group, including being present at negotiations in Geneva in July 2008.

The coordinator was also involved with horticulture's submissions connected with the free trade agreement (FTA) with Chile, and with respect to eight FTAs currently under negotiation or study (China, Japan, Malaysia, ASEAN, GCC, Korea, India and Indonesia). Activities include development of position papers, and reports and

representation at the time of negotiations.

The coordinator supported the development of Australian horticulture's position with China including organisation for, and participation in, the horticulture cooperation forum held in Beijing in September 2007, and extending to the memorandum of cooperation between HAL and the China Entry-Exit Inspection and Quarantine Association at that time.

Ongoing work has involved DAFF, Biosecurity Australia, AQIS and industry for new or restored quarantine market access into priority target markets such as China, Taiwan and other key south and east Asian markets and the USA.

On behalf of HMAC the coordinator has promoted and supported development of the horticultural market access strategic R&D plan which is targeted towards areas such as fruit fly, improved and commercial feasible disinfestation practices, and

alternatives to chemicals or treatments which may drop from use. The coordinator has also supported the development of the government, research community and industry working group for market access R&D to carry market access R&D work forward.

Also on behalf of HMAC the coordinator has promoted and supported the development of the contaminants management group which has expanded its scope from phytosanitary to broader sanitary contaminants and to cover both the domestic and international markets.

The on-going nature of the role reflects the timelines and complexities involved in achieving and maintaining market access.

Project AH07002

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IMPLEMENTING A NEEDS-BASED INDUSTRY DEVELOPMENT PROGRAM

Industry development is defined as the process of informing and empowering those in horticulture to make better business decisions. It encompasses all activities undertaken with the intention of gaining adoption of R&D.

HAL requires all horticultural industries to have conducted an industry development needs assessment by June 2009 for implementation in 2009/10.

To support and ensure appropriate rigour in carrying out needs assessments, HAL has developed a comprehensive nine step process and a set of industry development needs assessment tools and guidelines:

1. Establish a management and oversight group.
2. Set a timetable, definitions and objectives.
3. Define key industry characteristics.
4. Review industry development options.

5. Ask "what industry development are we doing now?"
6. Confirm a new list of industry development needs.
7. Prioritise needs and funding options.
8. Determine delivery options.
9. Implement the plan.

Each step has an associated series of guidelines and tools. For example, guideline 1.1 contains a diagram showing the process, steps, guidelines and tools that have been developed.

There is a strong link between industry strategic planning and assessing industry development needs. Industry strategic planning is designed to answer four basic questions:

1. Where are we now? (i.e. what is our current situation?)
2. Where do we want to be?
3. How will we get there?

4. How will we measure our progress?

Individual industry strategic plans provide a 'blueprint' for all that industry's activity, including R&D and marketing, and endeavours to ensure all activities complement national objectives.

Industry development bridges the gap between R&D and industry adoption, enabling industry strategic plans to be implemented. The industry development needs assessment is a process to determine the best, most efficient way of informing and empowering those in horticulture to make better business decisions.

Project AH06011

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FUTURE FOCUS

Future Focus is a \$2 million project that will produce the first whole-of-industry strategic plan in the history of Australian horticulture. The across industry program is contributing to this project.

It has been driven by a Leadership Group with representatives from across the supply chain including growers, markets, exporters, retailers, research agencies, the Australian Government and HAL.

The first phase of Future Focus, concluded in February. One of the most important outcomes of the first phase of Future Focus was the development of the industry baseline. This provides the industry with data that has never been available before and will become part of a very powerful tool to assist the industry in making strategic investment decisions.

The baseline is a 'business as usual' projection of key economic outcomes such as quantities, prices and profitability. It will paint a picture of likely outcomes if markets continue to follow current trends in key drivers.

The use of the baseline will allow Future Focus to create a point of comparison for potential strategic action plans. The benefits and costs of each option can be compared against the baseline to

consider that outcome against what might reasonably occur if no action were taken.

It is important that the Future Focus baseline covers all sectors of the horticulture industry so that the strategic plan outputs can be evaluated in a consistent way against a common metric.

The Future Focus baseline found that the Australian horticulture industry will grow 28 per cent to \$10 billion by 2020. However, increasing exports provide the greatest opportunity to increase industry income above the baseline level.

The base line model has been used to 'add up' the impacts of domestic demand, trade and production. The baseline outcomes of each area are summarised below:

Domestic demands

- A steady increase in domestic demand – as a result of population and income growth – will continue to underpin demand for horticulture.
- Total demand is expected to increase by an average of 1.1 per cent per year for fresh products and 0.7 per cent for processed.
- Food service demand is expected to grow at approximately 2.5 per cent per year.

Trade

- Current restrictions on the import of fresh products will remain in place with annual growth of 2.7 per cent.
- Imports of processed products is projected to increase by an average of 6.8 per cent per annum out to 2020 – which is less than average import growth over the past 5 years.
- As a result of significant recent plantings, farm level exports are projected to grow at 3.5 per cent per annum, a faster rate than imports.

Production

- By 2020, the gross value of production of fresh horticulture, including amenity, will be \$10 billion or around 28 per cent higher than 2005/06.
- The output of amenity horticulture is directly linked to the availability of water in metropolitan/urban areas. Gross value of production will steadily increase through the period as a result of higher costs in the industry.
- Across all horticulture farm level and processing industries, growth in gross value of production and profitability is projected to be below that for the economy as a whole.

The second phase of Future Focus included workshops focusing on the strategic priorities that were identified in phase one. These included effective supply, improving industry's competitive advantage, effective use of resources, commercial environments, and industry structures. The outcomes of the workshops will inform the development of the phase two report.

Phase three of Future Focus will identify the core outcome areas and steps forward to implementation. This will be reviewed by the Leadership Group in November and will form the basis for industry consultation and discussion before Future Focus is launched in May 2009.

Project HG06130

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PARTICIPATION IN THE CODEX COMMITTEE ON FRESH FRUITS AND VEGETABLES

HAL participated in the May 2008 meeting of the Committee on Fresh Fruits and Vegetables (CCFFV) which progressed a number of international standards.

Codex is the international food standards-setting body recognised under the World Trade Organisation agreements on sanitary and phytosanitary measures (SPS) and technical barriers to trade (TBT) as being the reference point for food standards applied in international trade. Its objectives are protecting the health of consumers and ensuring fair practices in food trade.

The CCFFV week-long meeting progressed standards of interest to

Australia including apples, tomatoes and bitter cassava, and the standard layout for all Codex fruit and vegetable standards. Standards for oranges and table grapes were recently completed. Future work for the CCFFV includes a revision of the standard for avocados and the development of new standards for durian, tree tomato and chilli peppers.

Project AH07017

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OUTCOME 3 POSITION HORTICULTURE TO COMPETE IN A GLOBALISED ENVIRONMENT

COOPERATIVE VENTURE FOR CAPACITY BUILDING (CVCB)

A recently concluded capacity-building project provided growers with the tools to embrace innovation.

The Co-operative Venture for Capacity Building (CVCB) project funded research and development (R&D) which would help provide horticultural enterprises with greater opportunity and skills to obtain the information and education needed to embrace innovation.

The intention was for all horticultural industries to benefit from the most

effective and efficient capacity building strategies and activities.

The principles developed by the CVCB were used to frame the HAL industry development portfolio plan, for example, the five extension models are used to analyse industry development needs.

A wide range of capacity building principles and tools are now available on the CVCB website (<http://www.rirdc.gov.au/capacitybuilding/reports.html>)

Representatives from horticulture industries participated in a project to acquire and implement capacity building tools. The FarmPlus project, which engaged agribusiness to extend R&D, was also an output of the CVCB.

Project AH06015

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OUTCOME 4 ACHIEVE LONG TERM VIABILITY AND SUSTAINABILITY FOR AUSTRALIAN HORTICULTURE

REVIEW TO PROVIDE A TOOLKIT TO NEGOTIATE PERI-URBAN LAND USE

Peri-urban land use and options for the future have been reviewed, and a toolkit is being produced to assist industry stakeholders negotiate planning and legislative issues.

For many years, land use planning and its impacts on horticulture in Australia have been identified by farming organisations being in the top five policy issues facing the sector. This issue is important to many intensive agricultural industries and has been on the government planning radar as a result of the increasing incidence of land use conflict in peri-urban areas as competition for finite land and water resources continues to intensify over time.

Agriculture and horticulture in peri-urban areas of Australia has been estimated to produce approximately 25 per cent of Australia's gross value of agricultural production from only three per cent of the total land base used for agriculture; as such, it is of great significance to the economy at large.

Industry associations, state farming organisations, and a wide range of affected stakeholders have struggled to come to grips with the issues surrounding land use planning and conflict. Agreement on how to address them is rare, often due to the conflicting aims and priorities associated with individual land ownership.

The IMC considered that a fresh review of the literature, which avoids a pre-determined policy outcome, was required. The aim is for the review to present an analysis of peri-urban land use options, which can be applied into the local context in an informed and reasoned manner.

The project is providing Australia's horticulture industry stakeholders with two major outputs:

- A literature review which provides an overview of the peri-urban planning context in Australia and analysis of current international and domestic policy

responses and their potential application to the Australian situation.

- A toolkit for horticulture industry stakeholders which will provide a road map through the planning and legislative maze and which will present some policy options worth considering depending on the local context.

Project AH07031

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SUBMISSION TO QUARANTINE AND BIOSECURITY REVIEW

HAL has funded and facilitated a submission to the independent Quarantine and Biosecurity Review panel.

In February 2008 the Minister for Agriculture, Fisheries and Forestry announced a comprehensive, independent review of Australia's quarantine and biosecurity systems. The review, the first wide-ranging assessment of quarantine and biosecurity in this country for many years, included but was not limited to, the functions of the Australian Quarantine and Inspection Service (AQIS) and Biosecurity Australia (BA). It is being undertaken by an independent panel of experts.

The review is considering issues such as:

- Animal and plant risk assessments.
- Targets for quarantine intervention.
- Import inspections and certification.
- The mechanisms in place to respond to incursions.
- The roles of, and relationships between, the Australian, state and territory governments, and the wider community.

As well, the review's terms of reference require the panel to make recommendations on the appropriateness, effectiveness and efficiency of:

1. Current arrangements to achieve Australia's very low, but not zero, 'appropriate level of protection'.
2. Public communication, consultation and research and review processes.
3. Resourcing levels and systems and their alignment with risk in delivering requisite services.
4. Governance and institutional arrangements to deliver biosecurity, quarantine and export certification services.

The HAL submission was generally supportive of the present process (i.e. a science based quarantine and biosecurity system under the World Trade Organization (WTO) sanitary and phytosanitary framework). It included 16 recommendations for Government consideration.

Industry members were given the

opportunity to meet with members of the independent review panel at the HAL Industry Forum meeting held in Sydney during May 2008. Prior to the meeting, HAL prepared a detailed submission briefing paper for industry members; outlining the reasoning behind each of the HAL submission recommendations. Following a summary of review progress by the panel chair, industry was then given the opportunity to address the panel to outline their quarantine and biosecurity concerns.

On 31 March 2008, Agriculture, Fisheries and Forestry, Minister Burke announced that the review would be extended by two months. The panel was scheduled to deliver its report and recommendations to the Minister by 30 September 2008.

Project AH07032

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CONSIDERING INDUSTRY'S CURRENT AND FUTURE HUMAN RESOURCE NEEDS

A project currently in progress is quantifying and evaluating Australian agriculture's current and future labour force and human resource requirements.

As Australian farms become increasingly reliant on technology and innovation to remain competitive, the need for more highly trained and skilled personnel is likely to become more acute throughout the agriculture supply chain. This is supported by demand for progressively higher skill levels within the farm workforce.

There are also growing requirements for quality assurance, environmental accreditation and trace-back systems in the agriculture industry, which also add to the demand for higher skill levels within the farm workforce.

There is currently no accurate

information available to inform industry of the current labour requirement of the agricultural sector (on-farm and through the value chain), the training requirements of this labour, or the expectation for labour moving forward.

This project is identifying the current (2008) labour force in agriculture and its key associated sectors, establishing an estimate of the training requirement by skillset, and will estimate the future expected labour demanded from agriculture and its key associated sectors.

The project will also examine the trends in education and training in Australia over the past 10–15 years and assess the sector's capacity to deliver future training requirements.

Finally, the project aims to make recommendations relating to regular and

cost effective updates as well as policy measures to assist in responding to the human resource needs of Australian agriculture.

To date the project:

- Has established methodology to reconcile established ABS statistics.
- Is in the process of finding a current (2008) estimate of labour demand in agriculture.
- Has reviewed available training and skills information and statistics.

Work on this project is continuing.

Project AH07026

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AUSTRALIAN HORTICULTURE'S RESPONSE TO CLIMATE CHANGE AND CLIMATE VARIABILITY

The impacts of climate change on Australian horticulture, and the industry's current and potential responses, have been investigated in this HAL across industry project.

Because horticulture in Australia consists of a large number of diverse industries, which are grown in a wide range of production regions, climate change impacts and adaptation to these impacts will be as diverse.

Many horticultural regions have already experienced a rise in both maximum and minimum temperatures compared with the 1961–90 base period. As a result of these changes, growers have already experienced an impact of climate change of up to 1°C rise in temperatures, and in the main, have successfully adapted to these changes.

Rises in temperatures up to 4°C will be a real challenge to horticulture, as climate

indices or thresholds of significance for the large range of horticultural crops are not well known.

To this end, a clear and defined understanding of how climate change will impact cropping systems and businesses in specific regions at temperatures up to 4°C is not readily available.

The simplest adaptation strategies are those currently being employed by growers – the use of more adaptable cultivars and cultural practices which enable growers to maintain current production in current locations. If future climate change impacts exceed growers' adaptation capacity at specific locations, then a southward shift of production is more likely to occur for growers to maintain profitability.

In this project, three regions in Australia (Lockyer Valley, Queensland. Riverina, NSW. Burdekin, Queensland) were selected

for their diversity of location and cropping, and the level of past and future climate change. Workshops were conducted with leading growers, consultants and scientists.

Flexibility has been the key to adaptation in horticulture to date, and is likely to continue to be an important component of adaptation strategies as climates continue to change.

There are potential negative impacts on horticulture with the introduction of an emissions trading scheme (ETS) into agriculture. Compliance with an ETS will be a significant challenge

Project AH06019

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HORTICULTURE WATER INITIATIVE ENTERS PHASE 4

The Horticulture Water Initiative (HWI), now in its fourth phase, was established to ensure access to water for responsible and profitable horticulture as one of five strategic initiatives for the whole horticulture industry.

This year the HWI developed a three year strategic plan (2007–10) focusing on five key objectives – empower industry, partnerships, innovation and adoption, informing policy, and positioning. These objectives were addressed through a number of activities.

One major activity involved the profiling of four horticultural growers and their decision-making processes and management strategies during drought. The case studies were made available on the HWI website for other growers to learn from. The study growers also participated in a forum conducted at the Irrigation Australia conference. The growers described how they managed low water allocation, and upon reflection, what they would do differently. The forum generated discussion about coping mechanisms and highlighted that decisions need to be made early, and once made, stuck to.

The initiative also conducted a crop water requirements forum which aimed to understand the major gaps in knowledge around water requirements for different crops under limited and non-limited water supply. A lack of information and expertise in using less than optimum volumes of water was identified.

Other major activities included:

- Working with the National Water Commission (NWC), Department of Environment Water Heritage and the Arts (DEWHA), Department of Agriculture, Fisheries and Forestry (DAFF) on water issues impacting on horticulture, including water trading, drought information and water purchasing.
- Partnering with Horticulture Australia Council (HAC) on responses related to drought and exceptional circumstances.
- Updating websites to provide relevant information on HWI strategies and activities, drought, drought assistance and exceptional circumstances.
- Electronic news distributed to members of the HWI reference group bi-monthly.

The Horticulture Water Initiative has



Water Steering Committee

determined key activities for the coming year including:

- Further addressing the issue of managing water allocations for apple and pear, citrus, dried fruit, table grape and almond industries.
- Monitoring and responding to national water plan 'Water for the future'.
- Developing a water policy position for the horticulture industries in peri-urban regions.

Project AH07009

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THE NATIONAL CLIMATE CHANGE RESEARCH STRATEGY FOR PRIMARY INDUSTRIES

The National Climate Change Research Strategy for Primary Industries (CCRSPI) has been a joint initiative of the 15 Rural Research and Development Corporations (through the Council of Chairs), the CSIRO, and the Commonwealth and all State and Territory governments (through the Primary Industries Standing Committee Research and Development Sub committee).

The development of the strategy has been a first step towards a nationally coordinated effort that will lead to sustainable and profitable Australian primary industries in the face of climate change.

It was shaped by consultations across the primary industries, through a process using expert reference groups, and direct approaches to government departments, research providers and the public. Reports were also commissioned from CSIRO, on impacts and adaptation, and from the Australian Farm Institute, on emissions trading, to underpin the development of the strategy. Horticulture Australia Limited (HAL) was engaged in this discussion from the outset, and actively contributed to the development of the strategy.

Six key themes for collaborative research, development and extension across industry sectors and governments were identified to underpin and enable change across the primary industries.

Underpinning research

1. **Understanding Future Climates:** Primary producers need better information about future climate and climate variability at seasonal timescales.
2. **Managing Emissions:** A full understanding of primary production life-cycles and processes is essential to reduce and offset emissions.
3. **Preparing Industries – Adaptation:** Primary producers are able to adapt and respond to climate change to maintain productive, profitable and sustainable systems.

Enabling research

4. **Accessing Information:** Primary producers need access to clear, relevant and factual information that is nationally consistent, but regionally and sectorally specific.



5. **Facilitating Change:** Changes are inevitable and must be facilitated through capacity and capability development.
6. **Linking Decision Makers:** It is essential that dialogue exists between researchers, policy makers and primary producers to align research priorities, policy development and industry responses.

Across the primary industries and the various sectors there are a range of different knowledge gaps and research priorities. However, the research strategy has identified that there are significant opportunities for industries to work together to reduce duplication of research and increase coordination of research investment.

There are also opportunities to share knowledge and experiences across industries on climate change issues and build on the work that has already been done in Australia and internationally.

These six areas provide a significant opportunity for collaborative work between the rural RDCs, CSIRO, Bureau of Meteorology, Commonwealth and state government agencies, universities and others to address issues where there are significant common interests, particularly in regard to emissions research and management, linking decision makers and providing stakeholders with access to authoritative hubs for information and guidance.

The CCRSPI development process

has established relationships and built momentum among primary industries, regions and research organisations to work together in addressing climate change. Over the coming years these relationships need to be maintained and developed so that information and lessons from the research strategy can be shared and joint research undertaken to address knowledge gaps.

A significant outcome from the work to date has been the level of discussion on climate change issues that has emerged between the different primary industries and regions.

During development of the strategy there was evidence of a strong desire to equip Australian primary industries to meet the challenges of climate change supported by robust, coordinated research, and clear communication of the best available information. As part of ongoing work in support of CCRSPI, a national effort to providing this information to assist people with their decision-making, whether they are farmers or policy-makers, will be a priority.

The National Climate Change Research Strategy for Primary Industries plus supporting documents can be downloaded from the Land & Water Australia website at www.lwa.gov.au/ccrsp

Project AH07027

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HORTICULTURE FOR TOMORROW PROMOTES ENVIRONMENTAL STEWARDSHIP

The Horticulture for Tomorrow environment portfolio public relations plan is enhancing the reputation of the Australian horticulture industry as a good environmental steward.

The project's objectives are being achieved by communicating to the wider community the way in which horticultural industries are addressing environmental management.

The primary target audience for the campaign is consumers with a secondary target audience being those who will play a vital role in delivering relevant information to, or influencing, the principal target audiences, including media, supermarkets, independent retailers and the central markets.

In 2007/08 the campaign messages were determined and media planning was completed. A new logo was developed under the existing Horticulture for Tomorrow program to capitalise on the profile already achieved by this successful environmental program.

A media release announcing the 27 May Natural Resource Management Summit kicked off the environment portfolio public relations campaign. Key media were approached and offered one-on-one interviews with speakers. *The Land* newspaper and *ABC Radio National* took up this opportunity.

The campaign continues into 2008/09.

Project AH07022

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AREA WIDE MANAGEMENT OF FRUIT FLY VALIDATED IN CENTRAL BURNETT

Area-wide management (AWM) of Queensland fruit fly has been shown to greatly improve control of this serious pest.

The project, carried out in Queensland's major citrus production area in the Central Burnett, was aimed at improving fruit fly control in major commercial crops and at implementing, for the first time, fruit fly control measures in town backyards of Gayndah and Mundubbera.

The control methods employed were regular protein baiting of host trees and the distribution of male annihilation technology (MAT) devices. These strategies were very effective resulting in 95 per cent reduction in peak trap catches across the district and infestation in backyard fruit in town areas being reduced from 61 to 22 per cent. This additional level of fruit fly field control should enhance market access opportunities for all Central Burnett growers.

An ongoing, industry funded AWM program (Phase two) has been initiated. QLD Department of Primary Industries and Fisheries will continue to provide direction through Project CT06046.

Project AH03002

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HORTICULTURE STATISTICS DATABASE

A project has been established to utilise the National Agriculture Monitoring Service (NAMS) to generate geographical information system (GIS) data on horticultural production.

The database will greatly assist scenario modeling and strategic planning by providing crop information and enhancing crop forecasting. Combined with other current data sources such as levy, retail sales, ABS and financial data, this project will provide comprehensive information to assist decision making in horticulture.

The initial part of the project has been to identify the 40 horticultural products that will be the focus for the work. The 40 products are being selected to reflect the HAL members and to maximise the usefulness of the data for industry planning and other purposes. Although the NAMS list of commodity groupings do not precisely reflect the HAL membership, the list has been through a number of iterations to date and is largely agreed. Opportunities exist to expand beyond these commodities at a later date.

The result for each of the 40 products is expected to be production and value data depicted according to ABS regional segmentation in production distribution and density maps.

Project AH07001

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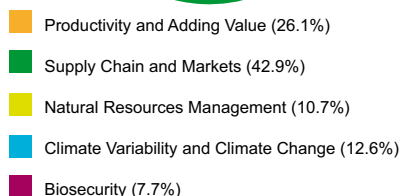
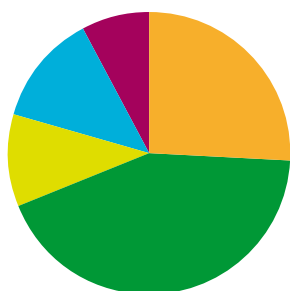
INVESTING IN AUSTRALIAN HORTICULTURE

AUSTRALIAN GOVERNMENT PRIORITIES

As part of the Australian Government's commitment to rural research and development, horticulture industries can access matching Commonwealth funding through HAL for all research and development activities.

The Australian Government's Rural Research and Development Priorities aim to foster innovation and guide R&D effort in the face of continuing economic, environmental and social change. HAL's operations are closely aligned with these priorities.

Percentage by value of Across Industry Projects



This chart shows the percentage of expenditure in HAL's across industry R&D program against the Australian Government priorities for rural research and development.

Productivity and Adding Value

Improve the productivity and profitability of existing industries and support the development of viable new industries.

Supply Chain and Markets

Better understand and respond to domestic and international market and consumer requirements and improve the flow of such information through the whole supply chain, including to consumers.

Natural Resource Management

Support effective management of Australia's natural resources to ensure primary industries are both economically and environmentally sustainable.

Climate Variability and Climate Change

Build resilience to climate variability and adapt to and mitigate the effects of climate change.

Biosecurity

Protect Australia's community, primary industries and environment from biosecurity threats.

Full details of expenditure across all industries is available in HAL's annual report at www.horticulture.com.au

RELATIONSHIPS AND ROLES RELATING TO HAL PROGRAMS

Horticulture Australia Limited (HAL) is a not-for-profit industry owned company. Its role is to manage the expenditure of funds collected by the Australian Government on behalf of horticulture industries.

HAL invests \$85 million annually in projects to benefit horticulture industries.

An Industry Advisory Committee (IAC) is established for each industry with a statutory levy and annual income exceeding \$150,000. The IAC is a subcommittee of the HAL Board. It makes recommendations to HAL on the expenditure of funds.

The industry management committee (IMC) acts as the industry advisory group for the across industry program.

ACROSS INDUSTRY PROGRAM 2007/08

Project No	Project Title	Levy or VC	Start Project	Project Completion	Organisation	Contact name
Outcome 1 Enhance the efficiency, transparency, responsiveness and integrity of the supply chain for the total industry to provide clear market signals						
AH04007	Pesticide regulation coordinator	Levy	05-Jul-04	01-Jul-09	AKC Consulting Pty Ltd	Kevin Bodnaruk 02 9499 3833
AH04009	Coordination of minor use permits for horticulture	Levy	01-Oct-04	30-Sep-07	AgAware Consulting Pty Ltd	Peter Dal Santo 03 5439 5916
AH06004	Horticulture Code of Conduct – Industry Support Package	Levy	15-Jan-07	30-Jun-08	Horticulture Australia Council	Kris Newton 02 6273 9600
AH06007	Industry Involvement in the Development of Primary Production and Processing Standards	Levy	05-Dec-06	29-May-09	Horticulture Australia Limited	Richard Bennett 03 5825 3753
AH06013	Horticulture for the Consumer CRC – Business Plan	Levy	30-May-07	31-May-07	Australian Institute for Commercialisation Ltd	John Kapeleris 1300 364 739
AH07021	Management of food safety risks in horticultural produce	Levy	01-Oct-07	30-May-08	Horticulture Australia Limited	Richard Bennett 03 5825 3753

ACROSS INDUSTRY PROGRAM 2007/08

Project No	Project Title	Levy or VC	Start Project	Project Completion	Organisation	Contact name
AH07030	ACCC Inquiry into the competitiveness of retail prices for standard groceries	Levy	11-Mar-08	04-Apr-08	CDI Pinnacle Management Pty Ltd	Richard Bennett 03 5825 3753
AH07033	Incident Response Protocol – development and training for horticulture	Levy	21-Apr-08	31-Aug-08	Control Risks	Julian Heath 02 9279 0099
MT07029	Managing pesticide access in horticulture	Levy	01-Jul-07	30-Jun-10	AgAware Consulting Pty Ltd	Peter Dal Santo 03 5439 5916
Outcome 2 Maximise the benefits of horticultural products in the eyes of consumers, influencers and government						
AH06010	Promoting the health advantages of fruit and vegetables to increase their consumption – Phase 2	Levy	06-Nov-06	25-Dec-07	Richard de Vos	Richard de Vos 02 9973 4507
AH07006	Promoting the health advantage of fruit and vegetable to increase their consumption	Levy	01-Jul-07	30-Jun-10	Horticulture Australia Limited	Chris Rowley 02 8901 0329
AH07007	Horticulture Wellbeing Initiative	Levy	01-Jul-07	30-Jun-08	Horticulture Australia Limited	Sarah Pennell 02 8295 2330
Outcome 3 Position horticulture to compete in a globalised environment						
AH05034	Market Access Support Program	Levy	01-Aug-05	30-Sep-07	Horticulture Australia Limited	Kim James 08 6389 1407
AH06011	Implementing a Needs-Based Industry Development Program	Levy	06-Nov-06	25-Dec-07	Horticulture Australia Limited	Richard Stephens 02 8295 2300
AH06015	Cooperative venture for capacity building (CVCB) membership fees	Levy	01-Apr-07	01-Aug-07	Rural Industries R&D Corporation	Richard Stephens 02 8295 2300
AH07001	Horticulture Statistics Database	Levy	25-Jun-08	19-Dec-08	Bureau of Rural Sciences	Dirk Platzen 02 6272 4282
AH07002	HAL market access coordination	Levy	01-Jul-07	01-Apr-09	Stephen Winter & Associates Pty Ltd	Stephen Winter 03 9832 0787
AH07003	Market access support program (follows project AH05034)	Levy	30-Jun-08	30-Jun-09	Horticulture Australia Limited	Kim James 08 6389 1407
AH07017	Codex Committee on Fresh Fruit and Vegetables participation	Levy	01-Jul-07	30-May-08	Horticulture Australia Limited	Richard Bennett 03 5825 3753
HG06130	Future Focus	Levy	01-Feb-07	31-Jan-08	Horticulture Australia Limited	David Chenu 02 8295 2300
Outcome 4 Achieve long term viability and sustainability for Australian horticulture						
AH06012	Evaluation strategies for varieties derived from Australian breeding projects or imported varieties	Levy	30-May-07	31-May-08	Diversity Arrays	Andrzej Kilian 02 6281 8514
AH06019	Australian horticulture's response to climate change and climate variability	Levy	01-Jul-06	31-Dec-08	QLD Department of Primary Industries & Fisheries	Peter Deuter 07 5466 2233
AH07009	Horticulture Water Initiative - Phase 4	Levy	01-Jul-07	30-Jun-08	RMCG	Anne-Maree Boland 1300 306 043
AH07022	Horticulture for Tomorrow – environment communication program	Levy	16-Aug-07	30-Jun-08	Horticulture Australia Limited	Alison Turnbull 02 8295 2300
AH07026	Project Definition - Human capability – building strategy benchmarking horticulture's labour and skills needs	Levy	05-May-08	21-Nov-08	Australian Farm Institute Ltd	Mick Keogh 02 9690 1388
AH07027	Horticulture component of the National Climate Change Research Strategy for Primary Industries	Levy	31-May-08	02-Jun-08	Land and Water Australia	Anwen Lovett 02 6263 6032
AH07031	Peri-urban encroachment policy paper	Levy	01-Apr-08	31-Oct-08	GHD	Luke Jewell 02 9241 5655
AH07032	Independent quarantine and biosecurity review	Levy	01-Apr-08	15-Jun-08	Horticulture Australia Limited	Kim James 08 6389 1407
OTHER						
AH03002	Area wide management of fruit fly – Central Burnett	Levy	01-Jul-03	31-Aug-07	QLD Department of Primary Industries & Fisheries	Annice Lloyd 07 3896 9366

ACROSS INDUSTRY PROGRAM 2008/09

Project No.	Title
Outcome 1 Enhance the efficiency, transparency, responsiveness and integrity of the supply chain for the total industry to provide clear market signals	
AH07033	Incidence response protocol - development and training for horticulture
AH08011	A baseline survey of knowledge, attitudes, approaches and aspirations regarding contamination management
MT07029	Managing pesticide access in horticulture
AH04007	Pesticide regulation coordinator
Outcome 2 Maximise the benefits of horticultural products in the eyes of consumers, influencers and government	
AH07006	Promoting the health advantage of fruit and vegetable to increase their consumption
Outcome 3 Position horticulture to compete in a globalised environment	
AH07002	HAL market access coordination
AH07003	Market access support program
Outcome 4 Achieve long term viability and sustainability for Australian horticulture	
AH08002	Horticulture Water Initiative 2008/09
AH08003	Analysis of horticulture's carbon footprint
AH07031	Peri-urban horticulture and land use planning: Literature review and tool kit

FINANCIAL REPORT ACROSS INDUSTRY PROGRAM INVESTMENT SUMMARY YEAR ENDED 30 JUNE 2008

	Marketing 2007/08	R&D 2007/08	Combined 2007/08
Funds available 1 July 2007	N/A	218,251	218,251
INCOME			
Contributions Received	N/A	593,823	593,823
Commonwealth Contributions	N/A	686,222	686,222
Total Income	N/A	1,280,045	1,280,045
PROGRAM INVESTMENT			
Across Industry Program Expenditure	N/A	1,207,925	1,207,925
Service Delivery Programs by HAL	N/A	164,519	164,519
Total Investment	N/A	1,372,444	1,372,444
Annual Surplus/Deficit	N/A	(92,399)	(92,399)
Funds available 30 June 2008	N/A	125,852	125,852



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HAL MEMBERS

A CLASS MEMBERS



Almond Board of Australia



Apple and Pear Australia Ltd



Australian Citrus Growers Inc



Australian Custard Apple Growers' Association



Australian Dried Fruits Association Inc



Australia Lychee Growers Association



Australian Macadamia Society Ltd



Australian Mango Industry Association Ltd



Australian Mushroom Growers' Association Ltd



Australian Nashi Growers' Association Ltd



Onions Australia



Australian Papaya Industry Association Ltd



Australian Passionfruit Industry Association



Australian Rubus Growers Association



Australian Table Grape Association Inc



AUSVEG



Avocados Australia Ltd



Cherry Growers of Australia Inc



Chestnuts Australia Inc



Nursery & Garden Industry Australia



Persimmons Australia Inc.



Potato Processing Association of Australia



Strawberries Australia Inc



Summerfruit Australia Ltd



Turf Producers' Association Ltd

B CLASS MEMBERS



Australian Asparagus Council



Australian Banana Growers Council Inc



Australian Garlic Industry Association Inc



Australian Nut Industry Council Inc



Australian Processing Tomato Research Council Inc

Australian Sugar Plum Industry Association



Australian Walnut Industry Association



Canned Fruits Industry Council of Australia



Growcom



Pistachio Growers Association Inc



Tasmanian Farmers and Graziers Association – Pyrethrum Growers Group

