



**Australian Banana Growers'
Council (ABGC)
Strategic Plan for
the Banana
Industry 2021-2026**

AUSTRALIAN BANANA GROWERS’ COUNCIL STRATEGIC PLAN FOR THE BANANA INDUSTRY 2021-2026

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SUMMARY

ABGC operates on a five-year strategic plan which will guide ABGC's activities between 2021 and 2026. This plan targets priority areas to advance the interests of Australia's commercial banana growers through effective leadership, advocacy, and representation to ensure a strong industry future. Priority themes were determined through extensive consultation with levy payers and other key stakeholders. During the consultation process, ABGC considered and sought feedback on the banana industry's strengths, challenges, threats, and opportunities, which allowed the development of four strategic themes:

- Sustainability and resilience through innovation and preparedness.
- Enhanced profitability.
- Develop industry capability
- Enhanced membership.

The strategic plan outlines each theme's chief areas of focus, key performance indicators, activities required to deliver the strategic and the industry situational analysis on which the strategic plan was based. Annual operating plans will outline the actions ABGC will take each year to achieve the outcomes for each priority theme.

ABGC's performance will be measured against Key performance indicators and the plan will be reviewed annually to ensure its relevance to industry needs.

OUR PURPOSE

The Australian Banana Growers' Council (ABGC) is the national industry development organisation for the banana industry. Our purpose is to advance the interests of Australia's commercial banana growers through effective leadership, advocacy, and representation to ensure a strong industry future.

THE CONSULTATION PROCESS

The development of this Strategic Plan involved an extensive consultation process, involving industry stakeholders along the whole supply chain but particularly Australian banana growers. Information used in the development of the Strategic Plan was gathered via workshops, surveys and individual interviews conducted in each region of the national industry and liaison with the National Extension Project regarding their farm visits. Results from this consultation process also informed the development of Hort Innovation's Banana Industry Strategic Investment Plan which guides levy investments in R&D and Marketing. Further detail of the consultation process can be found in Appendix 1.

As the national peak industry body for Australia's commercial banana growers, ABGC acts in the interests of banana growers on issues including biosecurity; pest and disease management; research and development; supply-chain issues and banana marketing and makes representations to policy and decision makers as well as Hort Innovation.

1. STRATEGIC PRIORITY THEMES

Four strategic priority themes were identified in response to industry consultation to develop the industry in the next five years. These are:

i. SUSTAINABILITY AND RESILIENCE THROUGH INNOVATION AND PREPAREDNESS

- Enhanced pest and disease management
 - Secure against TR4
 - Minimise the risk of exotic incursions and enhance preparedness
 - Containment and suppression of Banana Bunchy top disease
 - Enhanced efficiency in managing endemic pests
- An industry that farms to Best Management Practice
 - Biosecurity and pest management
 - Environmentally sustainable farming practices
 - High levels of food safety that protects our consumers
 - Stream-lined Quality Assurance systems to better manage quality and compliance.
- Waste management
 - Reduce the impact of farm plastics on the environment
 - Reduced wastage of fruit.

ii. IMPROVED PROFITABILITY

- Regular benchmarking
- Improving farm business decision making by sourcing and provision of relevant data.
- Advocating more transparent pricing
- Driving demand
- Strong marketing that exploits the convenience, and health benefits of banana.
- Fostering diversification of products and value-adding.
- Exploring and advancing greater automation in the industry.

iii. DEVELOP INDUSTRY CAPABILITY

- Maintaining and cultivating strong leadership
- Providing advocacy and influencing policy
- Promoting the industry as a desirable and ethical employer
- Promoting career paths and the development of our people
- Supporting new entrants to the industry through the provision of information.
- Ensuring all industry-related matters are communicated to growers, stakeholders and the supply chain.
- Keeping growers engaged in industry matters.
- Maintain unity, shared values and vision.
- Fostering relationships with banana growers, stakeholders and supply chain.
- Telling the story of the banana industry to consumers.

iv. ENHANCE MEMBERSHIP

- Cultivating a shared vision for a united banana industry
- Connecting the grower community.

- Providing representation and opportunities to members to influence decisions and the direction of the industry.
- Providing access to ABGC's knowledge and information.

2. KEY PERFORMANCE INDICATORS (KPIs)

The following table provides the mechanism for ABGC to demonstrate results in achieving identified industry outcomes between 2021- 2026

Strategic Theme	Industry Outcome	KPIs	Measure
1. Sustainability and resilience through innovation and preparedness.	Industry is safeguarded against TR4.	TR4 is being effectively managed.	Industry is leading the TR4 program by 2023.
	Australia remains free of exotic pests and diseases.	The industry is well prepared to deal with any exotic incursions should they occur. The risk of entry of exotic pests and diseases has been minimised.	RD&E projects are established support biosecurity preparedness. Policies and strategies are in place to support the management of exotic diseases incursions should they occur. EPPR levies are appropriately maintained to fund any agreed incursion response. The industry and its stakeholders have a mutual understanding of the roles and responsibilities for managing biosecurity threats
	Endemic pests and diseases are effectively managed to enhance profitability and reduce the impact on the environment.	There is greater availability of IPM systems to banana growers. There is greater collaboration on shared responsibility models for the management of endemic pests.	RD&E projects are in place to support the development and adoption of IPM programs and effective pest management. Policies and strategies are in place to support the management of endemic pests and diseases An effective communication program is in place. Collaborative relationships are maintained/ established with governments and other stakeholders.
	Banana industry farms to best management	Farms have adopted best practice standards for food	At least 90% of the north Queensland land under banana production has been

	practice, greater social licence and environmental responsibility.	safety, ethical practices, environment, and biosecurity.	<p>benchmarked against the Banana Industry Environmental BMP Guidelines</p> <p>RD&E projects are in place to support the development, communication and adoption of BMP programs.</p> <p>Policies and strategies are in place to support practical and reasonable implementation of BMP programs for the banana industry</p>
	Industry responds agilely to challenges and opportunities	<p>The Banana industry is well informed about the means to overcome challenges and about new opportunities.</p> <p>Effective relationships are in place with government, industry stakeholders and funders.</p>	<p>RD&E projects are in place to support and encourage responsible, innovative and sustainable farming practices</p> <p>Industry has clear strategies and policies in place to facilitate innovative, sustainable and responsible farming.</p> <p>An effective communication program is in place.</p>
2. Enhance profitability	Banana farming is a profitable industry thereby sustaining regional livelihoods and communities	<p>Growers have access to data that assists business decision making.</p> <p>The banana industry collaborates effectively with other Horticultural industries to resolve issues for the Hort Sector.</p> <p>The banana marketing program effectively maintains and drives demand.</p> <p>The industry makes tangible moves towards greater</p>	<p>Growers and others in the supply chain have been consulted on issues and opportunities</p> <p>Industry has clear policies in place to support more transparent pricing.</p> <p>RD&E projects have been established regularly to generate benchmarking data, support banana marketing, explore greater automation, value add and reduce waste.</p> <p>An effective communication program is in place to adopt new technologies and assist growers improve farm efficiencies.</p>

		<p>automation and waste reduction.</p> <p>Options to value add are available to growers</p>	<p>Joint strategic and tactical responses are deployed in collaboration with the rest of Horticulture.</p> <p>Industry representatives are highly engaged members of the R&D and Marketing SIAPS.</p>
<p>3. Develop industry capability</p>	<p>The banana industry has a committed, skilled workforce who share a united vision.</p>	<p>The industry has access to skilled workforce</p> <p>New people are entering or staying in the banana industry because they see it as an attractive employer and a good career choice</p>	<p>An effective communication program is in place to make sure people are well informed and the banana industry has a positive image.</p> <p>Professional development programs are conducted to enhance the capability of growers.</p> <p>Extension and development programs to support the adoption of new technology and improved farming methods.</p> <p>Scholarships and graduate programs are offered to increase the banana industry as a career choice.</p> <p>The banana industry congress is conducted every second year.</p>

<p>4. Enhance ABGC membership</p>	<p>Members are united, well represented, supported and informed to farm more profitably.</p> <p>Members influence key policies and decisions that shape the future of the industry and horticulture more broadly</p>	<p>Provide value for money, and a high standard of benefits and service to members and affiliates.</p> <p>Effective engagement and interaction with members.</p> <p>Up to date and relevant information delivered to members</p> <p>ABGC membership base is increased</p>	<p>Events run to engage with members and foster the sense of unity in the industry</p> <p>Regular meaningful consultation conducted with members.</p> <p>Regular inclusion of members in advocacy and policy interactions with government and stakeholders.</p> <p>Transport figures and other data provided to assist business decision making.</p> <p>Information is provided via a range of means to members which specifically suits their needs.</p>
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3. ABGC’s ACTIVITIES TO ACHIEVE STRATEGIC THEMES

i. ACHIEVE SUSTAINABILITY AND RESILIENCE THROUGH INNOVATION AND PREPAREDNESS.

- Influence then lead the management of TR4, including active participation in the TR4 Management Board.
- Ensure appropriate implementation and management of the Plant Health Australia levy funds.
- Manage the first Infested Property (1IP) and 2nd Suspect Property (2SP) in accordance with relevant regulations and environmental legislation to minimize the risk of TR4 spread.
- Build relationships with government bodies and Plant Health Australia and influence policies and strategies.
- Provide science-based information to the Commonwealth Government to inform decisions and mitigate the risk of exotic pests and diseases entering Australia.
- Fulfill the Banana industry’s obligations under the Emergency Plant Pest Response Deed (EPPRD)
- Implement and maintain an on-farm surveillance program for banana plant pests
- Work with industry and service providers to ensure research, development and extension investments are targeted to priority areas, coordinated and implemented, and are aligned to Hort Innovation’s Strategic Investment Plan for the banana industry e.g. TR4, diagnostics and biosecurity best management practice.
- Facilitate and encourage Integrated Pest and Disease Management approaches and opportunities for safe new chemicals

- Encourage, facilitate, support and promote the adoption of best management practice farming through industry development and extension projects to deliver positive outcomes for the environment, industry biosecurity, and food safety.
- Communicate industry information to assist government decision-making about the water quality on the Great Barrier Reef including sediment, nutrient and chemicals.
- Promote appropriate responses to government on biosecurity and environmental matters.
- Facilitate grants to incentivize practice change that will achieve environmental outcomes and improve profitability.
- Monitor R&D gaps
- Actively pursue opportunities and funding for potential new projects e.g. addressing on-farm waste.
- Liaise with and coordinate stakeholders involved in recycling to investigate, drive and assist initiatives to improve waste recycling in the banana industry.
- Promote adoption of appropriate R&D, including best practice. and to communicate critical issues, events and other industry development activities.
- Proactively liaise with growers and stakeholders about risks, emerging issues, opportunities and developments.

ii. ENHANCE PROFITABILITY

- Ensure regular levy-funded benchmarking projects are conducted to inform growers on how to improve farm efficiencies.
- Consult with growers and all stakeholders including Hort Innovation, to provide technical industry information to influence policy discussions and create positive outcomes for the banana industry.
- Collaborate with the rest of Australia's horticulture sector to formulate joint political and tactical responses.
- Investigate R&D gaps and the potential to develop new projects e.g. in precision agriculture and automation aimed at reducing the cost of labour and improve farm efficiencies.
- Investigate and promote ways for growers to value-add to improve profitability.
- Influence Hort Innovation's banana marketing and promotions work to sustain the industry.
- Ensure the work and results from the Marketing Program are communicated to growers
- Liaise and advocate with the supply chain and Horticulture sector for transparent pricing.
- Assist with export development opportunities in line with market demand.
- Inform banana growers of new and emerging R&D projects, funding initiatives and other industry-related projects and their outcomes that add value to their businesses, improve their on-farm practices and increase their financial viability.
- Promote the benefits of levy investment to growers and the wider industry.

iii. DEVELOP INDUSTRY CAPABILITY

- Monitor and influence COVID-19 policy to assist growers' business continuity.
- Influence processes to improve access to banana farm workers.
- Continue to promote the banana industry and its supply chain as a socially and environmental responsible producer of fruit and an ethical and attractive employer.
- Incentivise new people to enter a career in bananas through scholarships and involvement in graduate programs.
- Support and promote industry people through professional development activities and effective communication.

- Increase the capability of banana growers through extension and development programs to support the adoption of new technology and improved farming methods.
- Develop an effective range of communication material that is targeted to growers, industry stakeholders and the community.
- Co-ordinate, promote, and disseminate information through range of media channels regarding
 - Emerging or critical industry issues such as new government regulations, COVID-19, labour force, cyclones, and Panama TR4, when they arise.
 - outcomes from projects and R&D and marketing programs
 - the successes and challenges of banana growing.
 - industry initiatives and events.
- Collaborate with other professionals and/or government bodies to identify and expedite the communication of information.
- Organise and deliver the biennial Banana Industry Congress and communicate the benefits of Congress to growers/ industry and other stakeholders.

iv. ENHANCE MEMBERSHIP

- Create opportunities to engage with and connect the member community.
- Consult with and include members in advocacy.
- Give members a seat at the table for decisions made for industry e.g. by all levels of government, regulating bodies and funding organisations including Hort Innovation.
- Provide data and information to assist businesses success.
- Provide member tailored communication.
- Foster unity within the banana industry
- Provide value for money for membership fees.

4. SITUATIONAL ANALYSIS OF THE AUSTRALIAN BANANA INDUSTRY

A situational analysis was undertaken to identify and analyse the banana industry's internal strengths and challenges and the external opportunities and threats that shape current and future operations and assisted in the development of strategic priority themes.

INDUSTRY STRENGTHS

- The Australian Banana industry is a respected, mature, unified, and well-established industry with significant consolidation and that has faced many and diverse challenges in the past.
- The industry is more geographically diverse than it was 10 years ago and enjoys stable, year-round production and harvest which enables it to supply all the domestic demand.
- Australia's bananas are a clean, safe, fun, and healthy product that everyone likes and the industry benefits from strong consumer demand which is met by effective production and a functional supply chain.
- Comprised of passionate growers, the Australian banana industry includes farming enterprises of all sizes that have been able to make a satisfactory living. Some of these are innovative growers and marketers and lead the industry.
- The Australian industry also benefits from organised, consistent and cohesive industry representation, national levies for R&D, marketing and biosecurity, and is engaged in environmental issues and farming to best management practice standards.
- Investment in industry R&D is strong with good transfer of R&D outcomes back to growers.

- The industry is a world leader in the effective containment and biosecurity management of serious banana pests such as Panama Tropical Race 4 and Banana Bunchy Top Virus, as well as successful incursion management and eradication of Banana Freckle and Black Sigatoka, in the past.

CHALLENGES AND THREATS

- The banana industry in Australia is vulnerable because of its reliance on one variety, Cavendish, which is susceptible to Panama TR4 and many other pests and diseases. The future of TR4 containment and management is uncertain and uptake of on-farm biosecurity could be better. TR4 may spread before solutions are found. Access to chemicals is declining and development of new alternatives is low. Serious exotic banana diseases are on our doorstep with any new incursion having a serious impact on the industry.
- Cavendish accounts for 97% of Australia's banana production and therefore the industry provides little diversity to consumers e.g. in variety, size, ripeness, flavour, and packaging. The banana category is lacking in innovation, faces increasing competition from other fruits and risks further loss of retail value.
- Without any point of difference from our global competitors, the development of an export market will be challenging.
- Profit margins are tight which are exacerbated by prolonged periods of oversupply and the high cost of production in a manually intensive production system. Duration and frequency of good prices is diminishing and cannot be relied upon to survive the hard times. There is no single transparent system for assessing quality and occasionally poor-quality fruit is placed in the market.
- The marketing program is seen to be unresponsive to increasingly popular supply chains (e.g. meal kits and online shopping), to promotion ideas (e.g. linking consumers to the sentiments related to keen Australian growers) and is mostly an investment in advertising.
- The lack of industry data makes monitoring of production, inputs, outputs, and market trends and forecasting challenging to individual growers and the whole industry.
- The labour force is insecure as the banana industry relies on international workers. The public perceives the banana industry as a poor employer due to the manually-intensiveness of many tasks, work, health and safety issues. It therefore remains unattractive to many Australians as a workplace.
- Like much of Horticultural sector, plastic wastage and low access to recycling is an issue for the banana industry.
- There is an increasing burden of regulation and bureaucracy e.g. WHS, Sedex, Harps, HACPP, Freshcare, Fair Farms, Reef Regulations.
- With 95% of the Australian Industry located in far north Queensland, the industry is still relatively undiversified geographically.

OPPORTUNITIES

- Variety innovation
The development of new pest and disease resistant varieties particularly to TR4 to help secure the long-term viability of the industry.
Diversification into dessert and cooking bananas to provide innovation and differentiation in product offering (beyond Cavendish). Develop quality consumer eating experiences and provenance of Australian bananas.
- Innovation in production systems

Including automation and technology to improve production and supply chain efficiencies.

Facilitate timely data capture and utilization to enhance decision making.

Investigate and develop the potential for value adding.

- Improved marketing system
Consumer focused and targeted to improve returns.
Exploit all health benefits and safe quality, eating experience of bananas to drive and maintain demand.
A fair and more transparent marketing system.
- Best management Practice Farming and Quality Assurance
Transparent returns and encourage good grower/merchant relationships.
An improved harmonized food safety system.
Streamline compliance to regulatory systems.
Improve the industry's environmental credentials and promote the industry's responsible approach to farming.
Build on the industry's social licence to operate.
- Research and Development
Continue to develop options for growers to farm with TR4.
Enhance pest and disease management, biosecurity preparedness and work towards building IPDM systems.
Make better use of international research results.
Encourage automation and technology development.
Develop new varieties and facilitate their commercialization
Promote a credits scheme where growers are paid by private sector to adopt high and maintain high standards of practice e.g. reef credits, or plastic credits.
- Labour force
Maintain or enhance relationships with Pacific Island nations.
Promote and incentivize career paths in the banana industry and its supply chain to attract quality workers.
Develop training resources for workers to use as industry standards.
- Continuous enhancement of appropriate policies and regulation in collaboration with state and federal governments.