



# Interim Report

27 January 2022



## From the Advisory Committee

We might be halfway through the development of Future Fields, but the hard work is just beginning.

Over the next six months, the focus shifts to our final four fields. The collective actions of these fields must balance ambition with realistic achievable outcomes if the full value of this strategic plan is to be realised.

On behalf of the Advisory Committee, I look forward to working with Growcom, the Leaders and all stakeholders to progress this strategic plan and take Queensland horticulture forward for the next 10 years.

Angus Ferrier  
Chair, Future Fields  
Advisory Committee



## From Growcom

We'd like to start with a big thanks to all of those who've made the start to our Future Fields journey so successful.

We've been overwhelmed by your enthusiasm and support. Future Fields is clearly being recognised as a unique opportunity for the sector to chart its own path to success.

We're looking forward to working closely with our Future Fields Leaders, the Advisory Committee and other passionate stakeholders as the strategic plan takes shape.

We hope this Interim Report provides clarity of our process, and confidence we're all moving in the right direction.

Belinda Frentz  
Chair, Growcom



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## About Future Fields

**For those new to Future Fields, the following is a quick overview of our work. For others, this may be a useful refresh.**

Future Fields is a strategic plan for the Queensland fresh produce sector and supply chain, setting an ambitious vision and goals for where we want to be in ten years. It will also detail an initial two year program of work detailing actions to be taken and responsibilities across just a few key fields.

Future Fields will tell the story of the Queensland horticulture industry and fresh produce supply chain, in the words of its participants. It will capture our diversity, our strengths and values.

Future Fields will position Queensland horticulture to attract increasing domestic and international investment and to expand the value created and captured by the industry and along the supply chain.

## About this Interim Report

In broad terms, the process for developing the Future Fields strategic plan is being undertaken in two sequential phases.

The first phase was launched with the Future Fields Summit at the Brisbane Markets on 20 October 2021 and has involved a wide-ranging engagement and consultation process, designed to elicit the challenges of greatest concern and opportunities of greatest potential that the Queensland fresh produce sector expects to encounter over the next 10 years.

This first phase is now concluded with a process of shifting through all the excellent ideas and input received, identifying a number of distinct 'fields' that had emerged through consultation, and ultimately prioritizing just four of these fields to pursue through the first two years of action.

**This Interim Report seeks to provide all interested parties with a summary of our engagement activities, and an overview of the principles and methodology the Project Team has applied in identifying and prioritizing our Future Fields.**

The next phase of Future Fields has already begun, and involves developing detailed action plans for each of our final four fields. The Future Fields strategic plan will be finalised by the end of June 2022.

# Principles guiding Future Fields

Strategic plans get mixed reviews. Too many attract investment of time and money through development only to then shortly thereafter sit languishing, collecting dust on shelves.

There are a few common pitfalls in the development of strategic plans that can be anticipated and avoided with the consistent application of a few key principles. The development of Future Fields is being guided by three key overarching and interrelated principles.

## Sharing ownership

Our aim with Future Fields is to build an approach that explicitly includes all key players and stakeholders to ensure broad ownership. This is essential to reflect the broad interests and remit of stakeholders along the supply chain, and ensure that the strategy does not only reflect the interests of the authoring organisation.

Horticultural production in Queensland doesn't exist in a bubble. It is just one part of a supply chain. Growcom as the coordinator of Future Fields recognises that to impact the future of farming, we need to involve all parts of the fresh produce supply chain. We all share the same challenges and opportunities.

Moreover, many of our most significant challenges and opportunities will require collaborative action between parties at multiple parts of the supply chain. Some of our more enduring challenges persist because there has been no shared space or platform from which to approach them.

## Sharpening focus

While the scope of Future Fields is wide, taking in the fresh produce supply chain, the areas or 'fields' where actions will be taken will be kept in sharp focus. Time, attention and resources will be directed toward those distinct challenges and opportunities where we can have most impact and greatest benefit for the sector by working collaboratively together.

We are deliberately focusing our time, attention and resources on four key challenges and opportunities, so we have the best chance of achieving meaningful change.

## Leading action

Future Fields is about the horticulture industry and supply chain partners coming together and taking their futures into their own hands. This principle is underpinned by the understanding that people who take responsibility in a situation have the best chance of taking actions that will make a difference.

Future Fields is supported by the Queensland Government, but the actions arising from Future Fields will not necessarily rely on further government funding. There is scope, however, for collaboration and joint projects around agreed shared priorities into the future.

Sharing ownership on a focused list of priorities for collaboration, with actions identified by those with the ability to implement them, will ensure there is commitment to implement the strategy.

## Out of scope

It is important to acknowledge that while applying these principles is essential to the success of Future Fields as a strategic plan, it also means that some important challenges or opportunities cannot be prioritized, and some actions cannot be pursued because we don't have the necessary authority.

It's worth noting in particular, applying the principle of taking responsibility means Future Fields will not involve actions that include and depend on changes being made to state or federal government policy, regulation or law. These things are outside the immediate control of industry parties, and often require lengthy approval processes.

For example, out of scope actions include changes to state or federal environmental legislation, water and energy pricing, individual migration or employment programs, food safety regulation, and administrative arrangements for levies and for Research and Development Corporations. Working better or smarter within existing regulation is however well within scope.

Helpfully, there are existing avenues and forums for this important advocacy and policy work, through industry bodies and direct engagement with government. We do not intend for Future Fields to draw away from the attention this work deserves.

Through the engagement process we have however found plenty of challenges and opportunities that industry and government both recognise as exceptionally important, which we can start working on immediately together.

# Summary of engagement activities

To be successful Future Fields must be owned by all stakeholders with a role to play in bringing its vision to life, including growers, their suppliers, their buyers, government agencies, and those in research, banking, insurance, logistics, marketing and processing.

So, our engagement process has been designed to be open and inclusive, with multiple opportunities for interested parties to influence the direction of the strategy and identify those key fields of focus.

## Summit

On Wednesday 20 October over 120 stakeholders across the fresh produce supply chain, from government, research and other institutions, came together virtually and at the Brisbane Markets for the Future Fields Summit.

The Summit served the purpose of raising early awareness of the strategy consultation and development process, secure a commitment and engender broad ownership, and to build a spirit of openness and optimism.

The Summit included a workshop, facilitated by consultants Sustainable Innovation Company, where early insights were captured on those opportunities and challenges that are of the highest priority to those in the supply chain.

## Survey

A short four-question survey has been available online since mid-October 2021 to ensure we've captured as many views as possible in narrowing our attention down to just four distinct fields.

The questions ask respondents to identify the most significant strategic challenges, opportunities and disruptions they think we'll encounter in the next ten years. We have also asked respondents to share their own vision for the industry and supply chain, and identify how we should measure our success.

We have received over 90 responses to the end of January 2022. The survey will remain open until Future Fields is launched in June. A summary of responses as at 20 January is in Appendix A.

## Regional workshops

Workshops have now been held in most of the major horticulture production regions in Queensland, both virtually and in person, so that every grower and supply chain stakeholder will have had an opportunity to influence the direction of Future Fields.

Through November and December we have been grateful to receive strong interest and engagement at workshops in Bundaberg, Mundubbera, Bowen, South Johnstone, Mareeba and Stanthorpe. Attendance at each workshop has ranged between 10 and over 30 stakeholders.

The workshops were designed by consultants Sustainable Innovation Company, and were hosted and supported by each relevant regional grower association.

While growers have been well represented, all other parts of the supply and value chain have also been involved, including local government, banking, research institutions, transport, and state government agencies.

Like the workshop conducted at the Summit, these regional events have sought to elicit an understanding not just of key challenges and opportunities, but also their root causes, drivers and exactly how solving or addressing them would benefit the fresh produce supply chain.

Further workshops due to be held in the Lockyer Valley and on the Sunshine Coast in early 2022 will shift focus to exploring those solutions most likely to make an impact in each of the final four fields of focus.

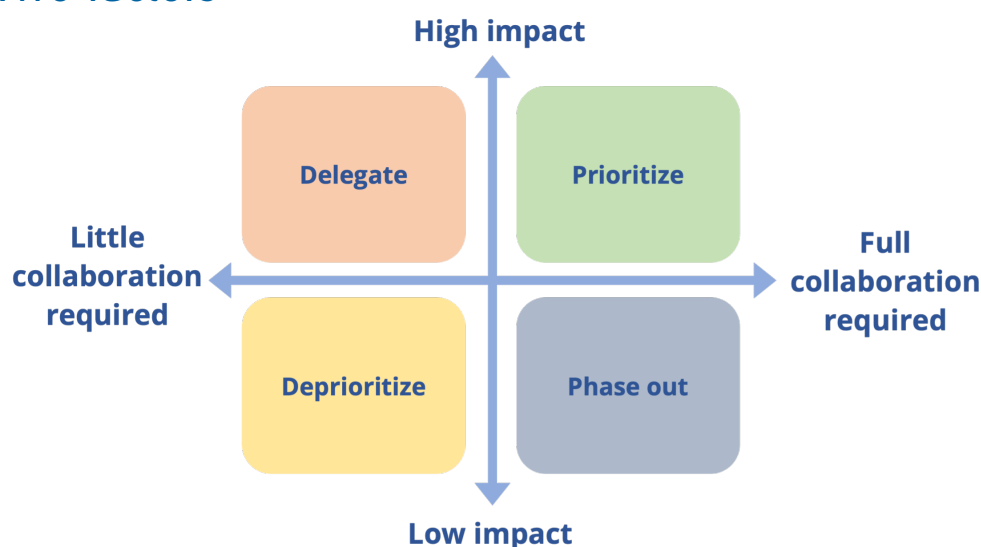


# Methodology for prioritizing fields

A rigorous, evidence-based methodology, driven by grassroots input, was developed and applied to the task of arriving at just a few key fields where the time, attention and resources of the fresh produce sector and supply chain would be focussed through the first two years of action under Future Fields.

This methodology involved a four-step process of capturing, synthesising, prioritising and selecting. An overarching logic was adopted at each of the last three steps of the process, where challenges and opportunities were converted into 'fields' and assessed in terms of two factors; the amount of benefit or 'impact' potentially derived by industry, and the level of 'collaboration' required to bring this impact about.

## Two factors



## Collaboration

The logic of assessing options in terms of the level of collaboration required to achieve an outcome stems from the guiding principle of Future Fields of shared ownership. A challenge or opportunity that is wholly within the power of one business, one organisation, or even one part of the supply chain to address is their concern and not the focus of a strategic plan following fresh food from farm to checkout.

Adopting this logic is informed by the insight that many of the big opportunities and intractable challenges we face as an industry remain big and intractable because they are both complex and require collaboration. If it were easy, someone would have fixed it already.

Future Fields then is concerned with creating a space for collaboration that would not

ordinarily exist, to address challenges and opportunities that would otherwise remain in the 'too hard' basket.

## Impact

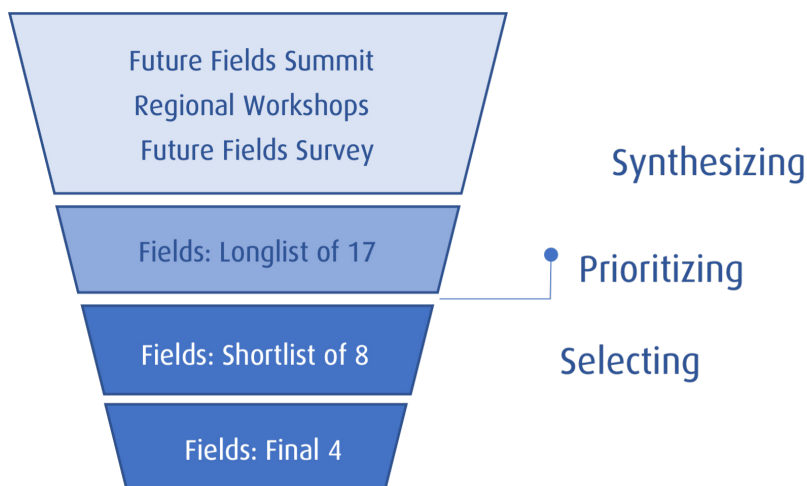
The logic of assessing options in terms of the benefit or impact they may potentially deliver is based on the guiding principle of sharpening focus. Focusing limited attention, time and resources on where you get the best return make sense, so long as that impact is reasonably achievable.

Impact is defined here as impact to the sector more broadly; challenges or opportunities that relate to individual organisations or sectors can be addressed by those sectors through other mechanisms.



## Four steps

A four-step process was followed to turn large amounts of valuable input and insight into just a few fields to focus on. The below diagram provides an overview.



### Capturing

Firstly, industry feedback was gathered, and ideas observed and captured from a diverse range of stakeholders from across the fresh produce supply chain and industry, principally through the Future Fields Summit, regional workshops and an industry wide online qualitative survey.

### Synthesising

Through November and December these raw inputs were brought together, and common concepts and ideas were identified and grouped together.

Those groups of concepts and ideas that came through as most dominant, by weight of raw inputs behind them, were further synthesised into a long list of 17 fields (see below), each with an aspirational narrative to provide context and scope for each field. For the purposes of the strategy, a 'field' should be thought of as a bounded area of strategic interest.

### Prioritising

The long list of 17 fields was then prioritized in early December into a short list of 8, primarily on the basis of feedback from the 12 industry expert members of the Future Fields Advisory Committee, but also based on the weight of input received through the engagement process.

The Committee met as a group to review and discuss the longlist. Each member participated independently in a semi-quantitative survey designed to record their assessment of each field against the two factors of impact and collaboration.

For a graphical summary of this feedback from the Advisory Committee see Appendix B. For more information and background on the Future Fields Advisory Committee see Appendix C.

### Selecting

Finally, at their inaugural meeting in mid-December the 12 Future Field Leaders reviewed and discussed the shortlist of 8 fields, before voting on their top three (3) preferences, both in terms of their assessment of each field against the two factors of impact and required collaboration, and in terms of their own interest in working on each field.

The four fields with the most votes from the Future Fields Leaders corresponded very closely with those fields identified by the Advisory Committee through their survey as presenting greatest impact and requiring most collaboration.

For more information and background on the Future Fields Leaders see Appendix D.

## Fields: Longlist, shortlist and final four

Each field on the longlist was given a working title and defined with an aspirational narrative to provide context. Those fields making the shortlist and final four are identified with a bullet point in the respective column.

Field	Short List	Final
<b>Zero Waste:</b> Designing new circular models for fresh produce production which involves sharing, reusing, and recycling, aimed at making the best use of resources, tackling waste (organic and non-organic) & pollution.		
<b>Bio Strong:</b> Preparing, preventing and managing pests, diseases and biosecurity risks using data intelligence and collaboration.	.	.
<b>Net Zero:</b> Actively contributing to net zero carbon by restoring biodiversity, improving soil health, transitioning to renewables and reducing emissions.		
<b>Climate Control:</b> Developing production systems that allow greater control of growing conditions, in a world of greater variation in weather and climate.	.	
<b>Market Led:</b> Delivering what markets demand, based on data analysis of consumer preferences, trends and production information.	.	
<b>Innovate 2 Access:</b> Accessing new markets through innovation including on farm, processing, new products & services, packaging & extending shelf life.	.	.
<b>Expanding Exports:</b> Access new and expand existing export markets by gaining a deep consumer understanding and taking a collective approach to supply and marketing.		
<b>Sustainable Chains:</b> Creating new supply chains to augment the existing chain that are shorter, decentralized, resilient, efficient and environmentally friendly.		
<b>Data Driven Decisions:</b> Connecting public and private data to provide new insights that empower businesses to make better, faster decisions.	.	
<b>Coordinated Compliance:</b> Making it easier for growers to comply with government regulations and meet market driven requirements through digitization and eliminating duplication.	.	.
<b>Horticulture Heroes:</b> Telling the positive horticulture story and being respected for doing the right thing by workers, communities and the environment.		
<b>Valuing Diversity:</b> Building diversity across fresh produce supply chains by fostering greater cooperation & collective bargaining by smaller businesses.		
<b>Working Smarter:</b> Building skills to adopt and apply the new technologies that will reduce reliance on low skilled jobs & labour intensive roles.	.	.
<b>Trust Through Traceability:</b> Leveraging existing and new traceability tools to tell consumers more about the provenance of their food and the sustainable practices used in its production.		
<b>Together We Thrive:</b> Supporting multiple leaders who will drive collaboration to make the fresh produce sector more prosperous & sustainable.		
<b>Local 4 Good:</b> Networks of fresh produce suppliers collectively inspiring communities to consume more hyper local produce.		
<b>Water Wise:</b> Improving water security through greater on-farm efficiency, and utilizing existing water assets better with additional infrastructure.	.	

## Final four fields and next steps

With confirmation of the four fields that the fresh produce sector will focus on over the next two years, the Future Fields strategic planning process moves onto its second and final phase.

Future Fields Leaders in small teams of three, with support from Growcom, the Department of Agriculture and Fisheries, and the Advisory Committee, will now develop a 'program of work' or action plan for each field. Throughout this task they will be engaged in a process of deep and targeted engagement with key stakeholders and leading experts in each field.

Remaining regional workshops in the Lockyer Valley and Sunshine Coast will be used to validate the challenges within each field, and to begin to exploring and testing likely solutions.

Each program of work will include a statement of what future success will look like for the field overall, identification of actions to deliver that described future state, owners of actions and timeframes for completion, and measures of success for each action.

These four programs of work will sit beneath an overarching strategic plan to be coordinated by Growcom, again using input and ideas captured through the engagement process, which will include a vision for the future of the fresh produce sector and supply chain, our shared values, and metrics to measure success of the strategy.

It is important to note that some fields not in the final four will still likely feature in, and be pursued through Future Fields as fundamental and underpinning the future success of the industry. These include, but are not limited to:

- Developing our leadership capacity,
- Promoting greater coordination and collaboration,
- Connecting public and private data to enable better decisions,
- Telling a more positive story about our sector, its prospects, and contribution to the economy and society.

## New markets through innovation

With a working title of 'Innovate 2 Access', this field concerns accessing and developing new markets for Queensland produce, through innovation on farm, in processing or along the supply chain. The result of innovation could include new products or services, new packaging, or alternate modes of transport.

## Simplifying market compliance

With a working title of 'Coordinated Compliance', this field concerns addressing broad industry frustration with the burden of both market and government driven compliance by applying latest digital solutions, and where possible, bringing scheme and regulation owners together to remove duplication.

## Building biosecurity capacity

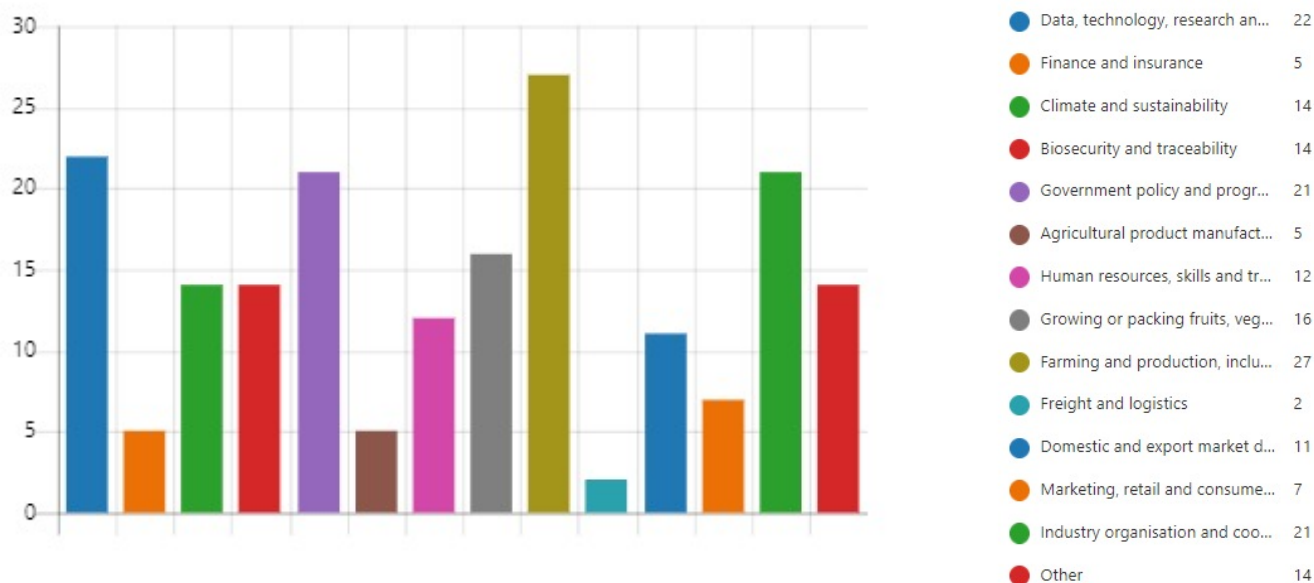
With a working title of 'Bio Strong', this field concerns improving our ongoing management of endemic pests and diseases through better use of new and existing data and intelligence, and through fostering greater collaboration and coordination between stakeholders responsible for biosecurity, including through leveraging data.

## Skills for reducing labour demand

With a working title of 'Working Smarter', this field concerns skilling up the Queensland fresh produce sector so that we are more able to identify and adopt labour-saving technologies that will help phase out repetitive and labour-intensive roles.

# Appendix A: Future Fields Survey

To 20 January a total of 93 responses to the survey have been recorded from a diverse cross section of the sector.



A wide range of challenges and opportunities were registered, with labour, sustainability, technology and data, biosecurity, markets and competition, and collaboration all commonly raised.



## Labour (All Challenges)

- Issues associated with sufficient labour, and sufficient skilled or appropriate labour (machinery operators, pick packers)
- Workplace H&S, compliance
- Labour retention, and issues associated with long term sourcing, pricing and reliability
- Need for long term labour solutions: attracting individuals to the industry, creating a narrative around horticulture and really investing in our people

## Sustainability challenges

- Dealing with issues such as water insecurity, climate constraints, adverse weather events, declining soil health
- Greenhouse emissions, carbon farming, working towards net zero targets and circularity: adoption of tech plays a role
- Balancing economic and produce viability, to continue generating safe, sustainable food for QLD
- Water security as a key issue

## Need for tech & data

- Tech to advance efforts in sustainability
- Data readiness to streamline/ automate processes, value add
- Providing transparency across supply chains (blockchain tech) for better decision making

## Biosecurity issues

- Mitigating biosecurity risks, limiting emergence of exotic pests and diseases, managing existing ones effectively
- Access to chemicals and information

## Barriers to collaboration

- No supporting framework, clear demarcation of how levies support innovation in our industry
- Lack of industry cohesion and collaborative spirit to find long term solutions to common issues

## Cost-return conundrum

- Lack of market power, and licence - supermarkets dictate prices
- Cost issues related to labour, market price, fertilisers and products



Survey respondents identified a number of current core beliefs or assumptions about the fresh produce sector and supply chain that they think will be most challenged or undermined over the next ten years.

#### Markets

- Our reliance on poor quality imports - most Australians unaware of market saturation
- Export market to China will change
- That air or sea freight will return to pre-Covid conditions by 2023
- Growing domestic consumption as a key channel - we need growth from exports
- Use of physical markets only. Digital will start to play a big role.

#### Individuals

- Idea that industry is blue collar only, or that horticulture involves low skills or low tech work
- Lack of work-life balance will change, not conducive to family or social life
- That producers can continue operating on low margins, low support - growers are fatigued
- That competition is key - we can achieve more collectively
- That corporate farms are inherently bad/don't support the broader industry

#### Sustainability

- Focus right now is too short term and cost driven, rather than longer term and collaborative
- The reputation that Australian produce is fresh, clean and green, and as efficient as our competitors
- That all fresh produce is harvested and grown in Australia
- Sustainability. In terms of soil health, water security, pest and disease control, waste.

#### Other

- Regions enjoying demand for their produce based on seasonality of other regions.
- Borders opening up will drive energy costs and inflation.
- Labour hire as a workforce management solution
- Replacing labour with special purpose automation

In terms of nominating a single metric to measure success of Future Fields, and of the fresh produce sector over the next ten years, profitability clearly came through as the most preferred.



#### Profitability

##### Customer/Market Focused

- Availability to consumers
- Consumer satisfaction
- The amount of Australian produce on the market
- Increased consumption
- Increase in export of QLD fresh produce
- Market diversification

#### Grower/People Focused

- Reputation of QLD growers and growing expertise
- Retention of small to medium agribusinesses
- Wellbeing of horticulture farming families
- Number of growers
- Increase in Australian workers
- Primary Producer viability and levels of satisfaction

#### Tech/Industry Evolution

- A comprehensive risk managed supply chain, with product traceability & responsiveness
- Increased value add and increased exports
- Adoption of practices and technology and associated ROI from that
- A harmonised distribution and logistics system
- Consistent supply

#### Sustainability

- Sustainability (economic, social, cultural, environmental)
- Clean and green. Food provenance.
- Reduced wastage

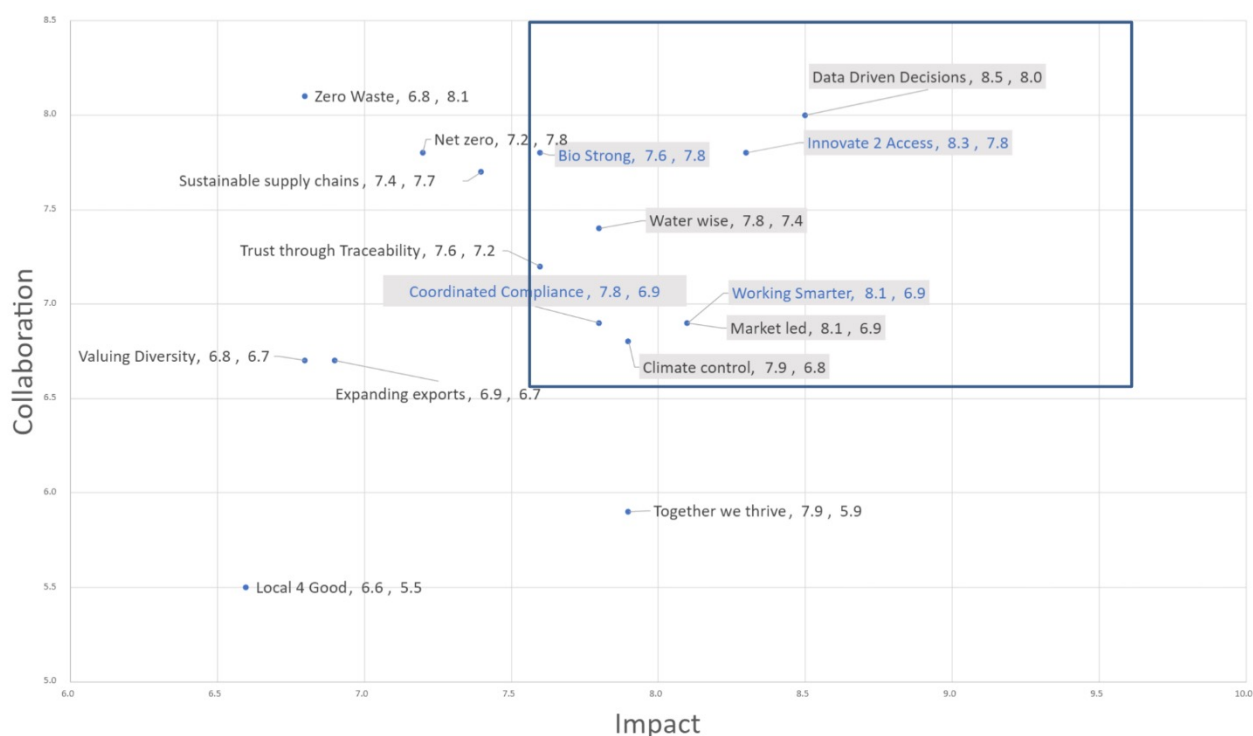
## Appendix B: Feedback from Advisory Committee

A key input into the prioritizing step was feedback from the Advisory Committee on the longlist of 17 fields identified through the engagement process.

Each committee member participated independently in a semi-quantitative survey designed to record their assessment of each field against the two factors of impact and collaboration, giving them a score out of 10 in both factors.

The below graph plots this feedback from the committee. The final four fields are highlighted in blue. All of them are in the top right quadrant (see box) of what is already a zoomed in view of the total matrix. The committee scored all longlisted fields above 5 out of 10 for each factor.

Note, the project team also considered other input in arriving at the shortlist, including what we've heard in person at regional workshops.



## Appendix C: About the Advisory Committee

The Future Fields Advisory Committee comprises a dozen leaders with senior executive management and governance experience and expertise at different points along the fresh produce supply chain. Collectively, members of the committee will champion the strategy and actively involve their networks with the strategy development process.

### Members

Below is a list of Advisory Committee members and their roles of responsibility across the fresh produce sector. The Committee is chaired by Mr Angus Ferrier, stone fruit and vegetable grower from the Granite Belt, and committee member of the Granite Belt Growers Association.

<b>Name</b>	<b>Position</b>	<b>Organisation</b>
<b>Liz Alexander</b>	Director	Queensland Rural and Industry Development Authority
	Commercialisation Facilitator	i4 Connect
<b>Fabian Carniel</b>	Owner	Mulgowie Farming Company
<b>John Corbett</b>	Chair	Queensland Rural and Industry Development Authority
	Director	Philip Yates Family Holdings Limited
<b>Sarah Corcoran</b>	Chief Executive Officer	Plant Health Australia
	Advisory Board Member	Centre of Excellence for Biosecurity Risk Analysis (CEBRA)
	Observer	National Biosecurity Committee
	Member	Plant Biosecurity Research Initiative
	Member	CSIRO Health & Biosecurity Advisory Group
<b>Angus Ferrier</b>	Committee member	Granite Belt Growers Association
	Manager	Rosemary Hill Orchard
<b>Belinda Frentz</b>	Chair	Growcom
	Deputy Chair	AUSVEG
	Owner and manager	Coastal Hydroponics
<b>Bob Gee</b>	Director-General	Queensland Department of Agriculture and Fisheries
<b>Emma Greenhatch</b>	Chief Executive Officer	Food and Agribusiness Network (FAN)
<b>Tony Kelly</b>	Chair	Brisbane Markets Limited
	Director	Hort Innovation
<b>Ben Martin</b>	Chair	Australian Mango Industry Association
	Vice President	Bowen Gumlu Growers Association
	Owner and manager	Marto's Mangoes
<b>Neena Mitter</b>	Director	QAAFI Centre for Horticultural Science
	Director	ARC Research Hub for Sustainable Crop Protection
<b>Debbie Smith</b>	President	Master Grocers Australia



## Appendix D: About the Future Fields Leaders

The Future Fields Leaders group comprises a dozen current and emerging leaders drawn from across the fresh produce supply chain. They include those managing or governing businesses or industry bodies, or those with the potential or aspiration to do so.

They have been selected through a competitive open expression of interest process, having demonstrated their appreciation for the key strategic challenges and opportunities to be grappled with by industry, and their willingness to work collaboratively for the common good.

Leaders' responsibilities will be similar to that of the Advisory Committee but with a focus on identifying, scoping, negotiating and confirming tangible collective actions to be included within the initial two year Future Fields program of work.

### Members

Below is a list of Leaders and their roles of responsibility across the fresh produce sector.

Name	Position	Organisation
<b>Femi Akinsanmi</b>	Principal Research Fellow, Centre for Horticultural Science	Queensland Alliance for Agriculture and Food Innovation (QAAFI) University of Queensland
<b>Eddie Alvarenga</b>	Marketing and Program Executive	Brismark
<b>Kristy Banks</b>	State Manager, Harvest Trail Information Service	MADEC Australia
<b>Richard Clayton</b>	Managing Director	Mackays Banana Marketing
<b>Johnathon Davey</b>	Executive Officer	Melons Australia
<b>Paul Fagg</b>	Marketing and HR Manager	JE Tipper
	Marketing Manager	Tropical Fruit Direct
	Committee Member	FNQ Growers
<b>Phil Horton</b>	Principal	Horton Finance
	Business Finance Specialist	A Class Business Finance
<b>Joshua Maunder</b>	Owner and Managing Director	Aus-Ex Fruit Exotic Tropical Association
<b>Kerry McCarthy</b>	Owner	Gracekate Farms
	Owner	Harvest Hands Labour
<b>Jennifer McKee</b>	Founder	Grower Support
<b>Kees Versteeg</b>	Sales, Marketing, Export and Business Development Manager	Qualipac Pty LtdW
<b>Jessica Volker</b>	Owner	Lower Don Organics
	Treasurer	Bowen Gumlu Growers Association

# Acknowledgements



The development of Future Fields has been made possible through support and funding from the Queensland Government.



The success of Future Fields Regional Workshops has been assured by the help and assistance of regional horticulture industry bodies, who are also members with Growcom of the Queensland Horticulture Council.



Future Fields' Regional Workshops are proudly supported and sponsored by Sunsuper.



The design of the engagement process and delivery of training in leadership and strategic planning is being led by experts at the Sustainable Innovation Company.



Growcom is especially proud to be developing Future Fields on behalf of the Queensland fresh produce sector and supply chain.

