



Australian Garlic Industry Strategic Plan

2021-2025



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1 Introduction

Why a Strategic Plan?

Late in 2020 the AGIA Board decided a new Strategic Plan was needed to support the Board's decision-making process and address the challenges presented to the AGIA. A new plan is an important resource and will be a guiding document that outlines the investment AGIA members will be making into the garlic industry over the next 5 years. It is important to note that the new Plan follows the structure of the 2015/219 Strategic Plan and when the current 5 year plan is completed, it will provide a record of over a decade of investment by the AGIA into the Australian garlic industry.

As is the case with all industry sectors, the dynamics and drivers of both internal and external factors change over time. Whilst the Australian garlic industry was suppressed by cheap imports during the late 1990s, the industry has enjoyed a strong resurgence since then as consumer demand has grown for Australian garlic alongside the emerging trends in the sector for local and fresh product. The AGIA has an important role in furthering consumer awareness of Australian garlic and giving growers the support when needed to grow quality garlic for either personal use or for commercial gain.

A core challenge for the AGIA is to deliver clear and well-articulated benefits for members who support the association. Through a process of member consultation, industry engagement and consideration of previous undertakings by the Board, new issues with fresh challenges and emerging opportunities were identified.

Informed by this work, our planning process has identified the strategic initiatives which are within the capacity of the AGIA resources to deliver over the term and which can provide optimum benefit to members and further the evolution of the Australian garlic industry.

What will the New Plan do?

Consistent with the 2015/2019 plan, this Strategic Plan has been developed to guide financial investment and resource development over the next 5 years. As this Plan is owned by AGIA members, there is a clear alignment of strategic initiatives with those needs expressed by members.

The new Plan is also a public document and will be available on the AGIA website. For potential new members and industry stakeholders, the plan demonstrates the commitment of the AGIA to growing and maintaining a strong membership that has multiple benefits for the Australian garlic industry.

How has the Plan been developed?

Unlike the previous Plan which was developed with the assistance of Commonwealth government funds, this Plan has been developed solely with AGIA member resources.

Early in the strategic planning process, the Board decided to follow the horticultural industry template available through HIA (Horticultural Innovation Australia, the industry body responsible for allocating levy and government funding in the horticultural sector). By closely following HIA guidelines, the Board saw an opportunity for future engagements with other government and non-government supporting agencies. These entities often have capacity to provide additional resources to supplement our vision of member and industry development.

Importantly, the Board also undertook an AGIA member survey to gauge what members wanted their AGIA to do. Along with input from the Board and industry engagement, we had a survey return rate of about 20% which was used to guide strategic outcomes and resource allocation. The results of the survey are contained within Appendix A of this Strategic Plan.

The Board then held a facilitated weekend meeting in Bendigo to assess the previous Strategic Plan, relevant updates, reviews and other information thought to be relevant. With the inclusion of revisions and considerations from this meeting, the process is now concluded with the AGIA 2021-2025 Strategic Plan.

How will the Plan be implemented?

The Strategic Plan will be implemented by the AGIA Board and sub-committees over the next 5 years with required allocation of AGIA member financial resources in accordance with the investment schedule included in the Plan.

Where the opportunity arises, the Board will also partner with other industry stakeholders and supporting bodies where the strategic benefit extends beyond the membership of the AGIA and supports the wider garlic industry.

The Plan is a dynamic document. It will be a continuing point of reference in our process, with regular reviews and amendments to maintain its currency and value.

2 Situational Awareness

The international position

During the period of the last AGIA Strategic Plan (2015-2019) world garlic production increased by 12%, while the area of production rose by only 9% (UN data < www.fao.org/faostat/en/#data>), most likely a combination of increased mechanisation and higher yielding garlic over the period. Unfortunately, the UN data doesn't contain Australian data, which is a reflection of the lack of support for the Australian garlic industry by our prime horticultural agency HIA.

Freshlogic (a data research agency of HIA) estimated in 2020 Australia imported 13,564 tons of garlic, 74% of imports came from China, 8% each from Mexico and Spain, 4% from Argentina and 3% from Egypt and a further 3% from other assorted nations.

Domestic production

The AGIA estimated in 2015 Australia had produced 3,000 ton of garlic, while importing approximately 12,000 ton. Applying the UN growth in world production (12%) over 2015-2019, the AGIA currently estimates Australia grew about 3,360 ton of garlic in 2019.

Freshlogic estimates of domestic production differ slightly from the AGIA. Freshlogic suggest Australia experienced a steep increase in production during 2018 and 2019 (33%), however the initial, or starting point for Freshlogic production estimates was lower pre 2018 than the AGIA. Therefore in 2019, Freshlogic estimated Australia produced 2,925 ton of garlic compared to the AGIA estimate of 3,360 ton in 2020.

The AGIA and Freshlogic estimates of total garlic imports in 2020 are closely aligned. Freshlogic data show 58% of imported garlic going into the fresh market and the balance to fresh supply.

Common barriers to increased production

What were perceived to be the common barriers to increased production in 2015 are still relevant to today,

- ❖ Price fluctuations as a result of supply (including imports) over the production cycle
- ❖ Willingness to invest in the cost of capital
- ❖ Unrealistic expectations.

AGIA Membership

The AGIA is a member owned association focused on member benefits that support the development and promotion of the Australian garlic industry. The association has limited capacity, both in terms of finances derived from membership fees, surpluses generated by its annual conference and volunteer resources to undertake capacity building tasks.

However, through the strategic planning process the AGIA will balance available resources and industry challenges is to generate a robust garlic community in Australia with a strong member emphasise.

Our Vision

A strong and resilient garlic growing community

Our Mission

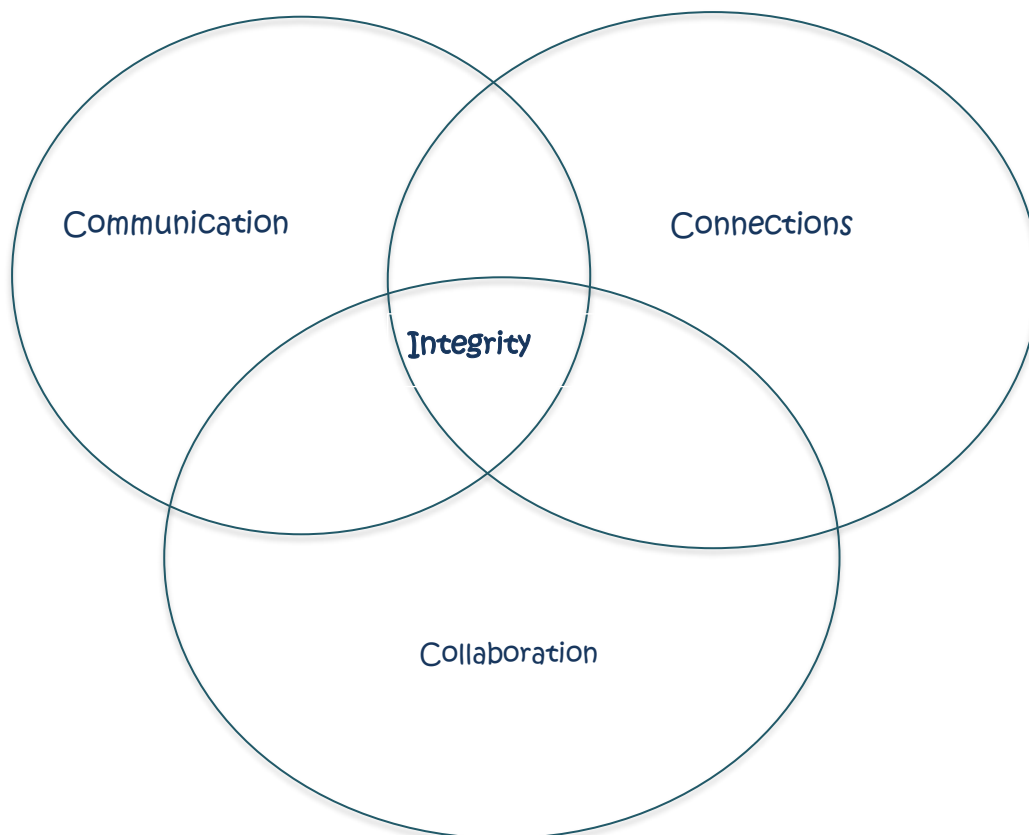
AGIA members working together to grow quality Australian garlic

AGIA Objectives

The AGIA has adopted the four Outcomes specified by Horticultural Innovation Australia as the industry standard for Strategic Planning and Continuous Improvement.

Objective 1	Objective 2	Objective 3	Objective 4
Data and insights	Industry supply, production, preparedness and sustainability gains	Demand creation	Extension and capacity building
Measurement of industry supply (production) and demand (consumer market) fundamentals; inform industry decision making	Improve industry productivity (inputs/outputs) to maintain local and international competitive and viability of supply	Grow consumer demand in domestic and international markets to support farm gate grower return	Extension; communication; capacity building and leadership

AGIA Values



Industry SWOT Analysis

The SWOT analysis is a current snap-shot compiled by the AGIA that reflects the insights of members of the Australian Garlic Industry association.

Strengths

- Australia wide membership base with a diversity of growing conditions and cultivars
- Information material for education,
- Increasing demand for Australian garlic
- Centralised knowledge base

Weakness

- Small amount of available volunteer human resources
- High proportion of inexperienced, small volume growers
- Over production in a narrow supply window
- AGIA board succession planning

Opportunities

- New emerging member communication strategies
- Regional cultivar and growing windows information and promotion of this resource
- Linking growers for mentoring
- Build and Strengthen AFA and AFA stakeholder ties

Threats

- Organisational loss of knowledge and experience
- Biosecurity of imported garlic used as seed stock
- Climate changing farm viability
- Improper use of AGIA brand

The 2021-2025 Strategic Plan has been informed by members, industry and government. For each of the outcomes under the four Objectives, we have developed strategies, outcomes with identified member benefits and KPIs.

In Section 4 of the document we provide a five year timeline which includes target dates for implementation of each strategy.

3 AGIA Strategic Plan

Objective 1: Data and Insights

Scope

Measurement of industry supply (production) and demand (consumer market) fundamentals; inform industry decision-making.

Deliverables

Achieved through developing AGIA knowledge base to enable members to make informed decisions about on farm production, enabling growers to identify their position in the market and market opportunities.

1.1 Amalgamating annual grower output

Quantify AGIA member production to allocate our member resources and validate other potential funding streams.

1.2 Disseminate demand data

Production choices (supply) are organised around knowledge of the demand cycle. Disseminating trade and wholesale markets data as available indicators for decision making by growers.

<u>Objective 1:</u> Data and Insights		
Strategy	1.1 Grower outputs Amalgamate annual grower output by garlic group. Provide an analysis of annual planting and yield by region.	1.2 Demand cycle. Consolidate and disseminate demand data to assist members in making informed decisions.
Outputs	<ul style="list-style-type: none"> <i>An annual report for AGIA resource allocation and industry standing</i> 	<ul style="list-style-type: none"> <i>Member portal trade information</i>
Member Outcomes	<ul style="list-style-type: none"> <i>Additional resources for members to make informed decisions</i> <i>Better AGIA resource focus</i> <i>Accessible data in the members portal</i> 	
KPIs	<ul style="list-style-type: none"> <i>On farm decisions based on AGIA data resources</i> <i>Annual output report</i> 	
Target	<ul style="list-style-type: none"> <i>On farm production reporting taken up by 40% of growers by year 2</i> 	

Objective 2: Industry supply, production, preparedness and sustainability gains

Scope

Improve industry productivity (inputs/outputs) to maintain local and international competitiveness and viability of supply.

Deliverables

Achieved through knowledge availability and grower retention, for a strong member driven association that will increase awareness and supply of Australian garlic to consumers.

2.1 Scheduled review of key grower resources

Establishment of an Editorial Committee/group that will ensure core, member facing documents are relevant and old or obsolete documents are removed and filed for historic reference.

2.2 Construct a new grower Toolkit

The Editorial Committee will develop a 'Toolkit' to assist new growers through the early learning stages. It will support growers and enhance longer term industry engagement and increased outputs.

2.3 APVMA permit expansion

Apply for further APVMA permits for on farm chemical use. Access to permits allows members a wider choice of chemical use to manage issues impacting farm output.

Objective 2: Industry supply, production, preparedness and sustainability gains

	2.1 Documentation Review	2.2 New Grower Toolkit
	Ensuring the availability of relevant resources and documentation for self-learning	Retention of new grower/members through the early stages while acquiring experience through a self-help program
Outputs	<ul style="list-style-type: none"> <i>A schedule of historic and relevant data that depicts the growing cycle.</i> 	<ul style="list-style-type: none"> <i>The AGIA on-line platform arranged so information is relevant and accessible for new growers</i> <i>Members can access an online AGIA Toolkit - an educational resource based on the life cycle of planting.</i>
Member Outcomes	<ul style="list-style-type: none"> <i>Readily accessible online information</i> <i>Informed on farm decisions</i> 	
KPI's	<ul style="list-style-type: none"> <i>Measurable online traffic</i> <i>Movement in data downloads from member portal.</i> 	
Target	<ul style="list-style-type: none"> <i>Improve membership retention (keep % consistent across Objectives)</i> 	

Objective 2: Industry supply, production, preparedness and sustainability gains (contd.)

Strategy	<p>2.3 APVMA permit expansion</p> <p>Apply for additional APVMA chemical use permits for AGIA members</p>
Outputs	<ul style="list-style-type: none"> • <i>AGIA Member surveys to determine the categories of chemicals for which permits are required</i> • <i>Chemical permits issued by the APVMA allowing growers to legally use a wider range of chemicals when “off label” use is not permitted</i>
Member Outcomes	<ul style="list-style-type: none"> • <i>Members have a range of chemical options not otherwise legally available for use without significant expertise or bureaucratic or financial obstacles</i> • <i>Increasing on farm efficiency and yields with targeted chemical applications</i> • <i>Cheaper application process for blanket approvals.</i>
KPI's	<ul style="list-style-type: none"> • <i>Member survey and consultation</i> • <i>Appointment of a specialist subcommittee</i> • <i>Permit Application process</i>
Target	<ul style="list-style-type: none"> • <i>Submit applications for member identified, prioritized and Board approved permits over the period of the Plan. (Herbicide, pesticide and fungicide)</i>

Objective 3: Creating Demand

Scope

Grow consumer demand in domestic and international markets to support farm gate grower return

Deliverables

Achieved by providing support and tools for growers to communicate the benefits of Australian garlic to consumers.

3.1 Increase the accessibility and profile of the Grower/Seller page

Ensuring the Grower/Seller page is accessible to a wide range of consumers

3.2 Develop member only marketing material highlighting the benefit of using Australian garlic

Develop a resource for AGIA members to own and communicate to their customers the benefit of Australian grown garlic.

Objective 3: Creating Demand

Strategy	<p>3.1 Increase the accessibility and profile of the Grower/Seller page.</p> <p>Strengthen the Grower /Seller page as a point of connection between growers and consumers wanting to buy garlic.</p>	<p>3.2 Develop AGIA marketing material highlighting the benefit of using Australian garlic.</p> <p>Review sources of garlic claims to assist growers with a range of consumer ready, AGIA attributed marketing material.</p>
Outputs	<i>AGIA members integrating the Grower/Seller page into their own business marketing strategy</i>	<i>Marketing material reflecting a strong Australian grown garlic message to consumers</i>
Member Outcomes	<ul style="list-style-type: none"> • <i>Increased sales</i> • <i>A strong AGIA and consumer link</i> • <i>Alignment with other Australian grown programs</i> 	
KPI's	<ul style="list-style-type: none"> • <i>Increased number of AGIA members listing on the Grower/Seller page</i> • <i>Members integrating AGIA prepared resources into their own marketing plans</i> 	
Target	<ul style="list-style-type: none"> • <i>Increase the number of growers listed on the Grower/Seller page by 15%.</i> • <i>AGIA marketing material accessed and integrated by 50% of the growers listed on the Grower/Seller page</i> 	

Objective 4: Extension and Capacity Building

Scope

Extension; communication; capacity building and leadership

Deliverables

Achieved through building industry knowledge throughout the AGIA to assist growers to produce quality garlic. To build respect and confidence in the AGIA brand.

4.1 Deliver learning and networking opportunities through an annual conference

The annual AGIA conference attracts attendees from all over Australia to hear industry leader's present information and research on garlic and horticultural related topics, it also provides for networking and showcasing opportunities.

4.2 Code of Practice

Bringing together AGIA member activities across the Australia with a Code of Practice will build consumer confidence in the AGIA brand and strengthen the relevance of the Association for members and encourage consumers to use the Association as a first point of contact.

Objective 4: Extension and capacity building

Key Strategy Areas	4.1 Annual conferences	4.2 Code of Practice
	Continue to deliver extension and networking opportunities through an annual conference	Establish a Code of Practice that is identifiable by membership of the AGIA
Outputs	<ul style="list-style-type: none"> Annual networking and extension activities Accumulated member resources Building member & industry networks Identify future leaders 	<ul style="list-style-type: none"> Ensuring AGIA growers are cognizant of industry expectations Capacity shortfalls are identifiable and resources are available to rectify those shortfalls
Member Outcomes	<ul style="list-style-type: none"> Industry enhancement through engagement. Develop strong industry relationships and 'go to' industry resources Strengthen the AGIA public facing brand and consumer confidence AGIA branding is a value proposition by members Identify 'succession' resources 	
KPI's	<ul style="list-style-type: none"> Annual conference Members acknowledging the COP when joining and renewing membership. 	
Target	<ul style="list-style-type: none"> Increase AGIA membership by a minimum of 10% pa. Implement the Code of Practice 	

4 AGIA Investment and Action Plan

Objective 1 : Strategies		Action	Implementation					Budget
			2021	2022	2023	2024	2025	
	1.1 Grower Outputs	Develop a return template and reporting framework						Internal resources
		First reporting period, 30th June and follow up report						
	1.2 Demand Cycle	Establish the data required & web based dissemination						Internal resources
		Provide trade and wholesale market data						-\$2,000pa

Objective 2 : Strategies		Action	Implementation					Budget
			2021	2022	2023	2024	2025	
	2.1 Documentation review	Review current AGIA online documents						Internal resources
		Remove to Dropbox obsolete files						
		Index files to ensure easy reference by topic						
	2.2 New grower toolkit	Collate files relevant for a new grower from 2.1						Internal resources
		Link online to the membership application process						
	2.3 APVMA Permit extension	Survey members to determine which, additional permits would be beneficial						Internal resources
		Apply for APVMA permits and link online AGIA registered permits						

Objective 3 : Strategies		Action	Implementation					Budget
			2021	2022	2023	2024	2025	
	3.1 Increase the accessibility and profile of the Grower/Seller page.	Communicate to members the existence and benefit of the Grower/Seller page						Internal resources
		Develop visible media links to the Grower/Seller page						
		Ensure the Grower/Seller page is incorporated in 3.2						
	3.2 Develop AGIA marketing material highlighting the benefit of using Australian garlic.	Research the range of marketing & funding options that will increase awareness of Australian garlic						-\$15,000
		Assess the range of options that will deliver best outcomes for AGIA members						
		Implement a marketing program that delivers for AGIA members increased awareness of Australian garlic						

Objective 4 : Strategies		Action	Implementation					Budget
			2021	2022	2023	2024	2025	
	4.1 Annual conferences	Undertake an annual Conference						Internal resources +\$3,000
	4.2 Code of Practice	Develop a grower Code of Practice that reflects the AGIA Values						Internal resources
		Incorporate the COP into membership application and renewal processes						
	Direct online searches to growers subscribing to the COP							

Appendix A

Member Response to the 2021 Survey

What is the greatest value that the AGIA brings to you?

- 1 A sense of involvement in the industry, ability to connect with other growers
- 2 support and ideas
- 3 Conference and contacts
- 4 News, information, contacts.
- 5 A source of information about garlic growing, and a database to allow member to members trading
- 6 Centralised Knowledge base, forums, industry centre-point
- 7 Relevant Knowledge and information all in one place
- 8 Contacts and a knowledge base
- 9 Advice and information
- 10 Advice and information
- 11 access to information
- 12 Learning and networking opportunities
- 13 Market Access, Grower Contacts.

What types of member engagements do you want from the AGIA during 2021/25?

- 1 Educational events eg. conference, National Garlic Day, regional get-togethers
- 2 Forums, Permits, Seminars & queries
- 3 Conference
- 4 Hands on sharing/guidance.
- 5 Web based information is very convenient so continue to improve the website. Group workshops where growers can learn.
- 6 3-4 events focused on parts of garlic production - e.g. Pests /disease, growing nutrient requirements, value added products now & future, machinery & equipment for each scale of production.
- 7 More zoom catch-ups
- 8 as above - Advice and information
- 9 member portal that allows for easy communication between members
- 10 Meetings and webinars
- 11 Growing advice, Market Development.

What outcomes do you want the AGIA to achieve over 2021/25?

- 1 To ensure the continuation of the Australian Food Awards garlic class
- 2 Investigate ways to combat climate anomalies
- 3 Having conference in different areas so we can learn from different people
- 4 Help reduce Australia's reliance on imports.

- 5 Increase awareness about the imbalance between the quantity of locally grown garlic and imported garlic
- 6 Greater communication of the superiority of Australian grown garlic
- 7 Maybe a national co-op with set pricing and a small research levy
- 8 Advice and assistance for crop developments
- 9 develop both the commercial traditional and organic (certified) sides of the industry
- 10 Maintain a platform to facilitate and nurture the Australian garlic industry by the sharing of knowledge and experience
- 11 Australian Garlic Marketing Plan Consumer. Varietal standardisation.

How can the AGIA best support members in the garlic environment?

- 1 Keep us informed of industry developments; events; help us stay connected; help drive consumer demand for a broad variety of garlic varieties.
- 2 Sourcing current information for assistance with issues
- 3 By being a facilitator between members
- 4 Sharing information
- 5 Promote locally grown garlic
- 6 Knowledge sharing. Aust. garlic brand promotion/education
- 7 Can we educate the consumer of the benefits of buying Australian grown garlic over those imported from countries where they use herbicides and insecticides that are banned in our country?
- 8 as above - Maybe a national co-op with set pricing and a small research levy
- 9 as above - Advice and assistance for crop developments
- 10 pretty much continuing to engage across the industry, government and customer areas of the industry
- 11 Education encouragement and advice
- 12 Consumer Communication, Makes access retailers / Consumers

Additional comments

- 1 Thanks for existing.
- 2 Still more need to communicate to greater public the reality of chemicals used in overseas garlic vs Aus grown.
- 3 the Facebook page (Australian commercial garlic growers) provides good communication tools - the website needs to do this better.
- 4 Looking forward to gaining confidence in growing garlic and supplying a high standard of product for the market.