Final Report

Foodservice foundational market insights

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Delivery partner:

KPMG

Project code:

MT21011

Project:

Foodservice foundational market insights (MT21011)

Disclaimer:

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Content

Summary

The Australian foodservice industry is currently valued at $65.4bn, and projected revenue CAGR from 2022 to 2027 is 5.1% *($84.1bn). Thus, highlighting opportunity for the horticulture industry to further engage with foodservice channels to increase profitability and growth prospects. The MT21011 Project will provide industry members with foundational market insights on the key foodservice channels identified within the project scope, and high-level strategic direction regarding how ambitions can be actioned across all of horticulture.

MT21011 consisted of the development of four key reports, with specific purposes:

- **Market Profile**
  - Provide key insights (potential needs, considerations, and areas of opportunity) for each of the foodservice channels
  - Identify the greatest growth opportunities for the defined product categories in the foodservice sector
  - Prioritise foodservice channels suitable for targeted engagement for the horticulture industry
- **Segmentation Report**
  - Provide practical and relevant information on each of the foodservice channel's general requirements and attitudes
  - Equip the horticulture industry with foundational and critical knowledge to foster engagement with the identified foodservice channels pursued
  - Provide a report that is embedded with foodservice industry insight
- **Value Chain Maps**
  - Support understanding of the value chain in which horticultural product moves through
  - Outline key nuances between foodservice value chains to consider when targeting specific foodservice channels
  - Highlight value chain decision making points that need to be evaluated in order to better engage with the foodservice sector.
- **Market Intelligence Report**
  - **Category Snapshot Report**
    - Highlight category-specific macro trends, segmentation alignment, value chain nuances that need to be considered by category industries, and commercial decision opportunities
  - **Strategy**
    - Provide guidance on foodservice industry activity and investment that will allow focus industries to capitalise on identified opportunities across foodservice
    - Encourage more successful growth and market penetration in identified commercial and industrial foodservice channels

The project was completed using desktop analysis, stakeholder consultation with the foodservice industry, as well as consultation with the industry Project Reference Group (PRG). This was to validate outcomes and ensure all deliverables were relevant, practical and aligned with current industry capabilities. Industry members were consistently involved throughout the project. The outcomes of this project identify high-level actions and activities that the Australian horticulture industry should focus upon to achieve growth and increased productivity across foodservice.

The focus of this work is to provide foundational insights across ten foodservice channels within two sectors:

- Commercial (Restaurants, Cafés, Catering, Airlines, Tourism, Meal Kits)
- Institutional (Defence, Health, Education, Mining)

The opportunities, challenges, and nuances between each channel had specific reference to seven horticultural categories:

- Avocados
- Melons
- Mushrooms
- Onions
- Papayas
- Sweet Potatoes

- Vegetables

Keywords

Avocados; Melons; Mushrooms;Onions; Papayas; Sweet Potatoes; Vegetables; Value Chain; Market Profile; Foodservice; Supply Chain; Consumer; Segmentation Alignment; Market Intelligence; Commercial; Institutional

Introduction

The foodservice market in Australia consists of both commercial and institutional channels, both of which have experienced growth over the last decade. COVID-19 has deeply impacted foodservice sector; however, it has affected the institutional and commercial segments differently. Strict government-imposed lockdowns have had stronger ramifications for most commercial sub-channels, whereas institutional channels have seen consistent growth given their relatively undisrupted operations.

To drive future foodservice engagement, the insights contained in all reports produced from project MT21011 should be used to inform the understanding of foodservice industry desires and values which fundamentally drive their business operations. For the horticulture industry to maintain and increase foodservice engagement, there needs to be an aligned understanding of channel requirements.

The Strategy contained within the Market Intelligence report intends to work toward the following outcomes:

- Aligning to foodservice trends and developments
- Enhancing marketing and communications
- Building relationships
- Optimising supply chains

To do so, each horticulture industry needs to understand how it applies to them. The Category Snapshot Report addresses these nuances and considerations through addressment of:

- Value chain commercial decision points
- Opportunities for category advocation
- Research and development
- Versatility across categories
- Quality standards
- Product formats

The Strategy provides high-level, indicative insights as to how the Australian horticulture industry can take and harness the intelligence, direction and support it needs to unlock new and diverse foodservice opportunities in over the next few years 2022-2027 and beyond.

Methodology

A phased approach was used to carry out MT21011 to ensure that targeted objectives were met within the required timeframe.

Phase 1: Kick off and industry objectives

In this phase, we conducted a PRG kick off workshop, performed a current state information review and initiated stakeholder outreach to organise the industry workshop in Phase 2. The objectives of this phase were to set project cadence, agree on foodservice channels, confirm stakeholders, and develop data gathering plan to commence desktop research.

In the PRG workshop, we probed representatives on their priorities for the project and other key focus areas and plan analysis accordingly. We worked with the PRG to align on the foodservice channels desired.

Phase 2: Macro insights analysis

The objective of this phase was to conduct a macro insights analysis that was purely informed by desktop research, produce market profiling and conduct stakeholder mapping.

In this phase, we conducted a market sizing exercise for Australian foodservice sector by utilising revenue and growth quantitative data to form estimated market size. Through desktop research, we determined foodservice channel sizes, values and volume fluctuations, general trends, and growth drivers as well as key attributes.

Findings and insights were validated by KPMG food industry SMEs.

Stakeholders across the Australian foodservice value chain were identified, and an outreach plan was drafted.

A key deliverable of this phase was the Market Profile.

Phase 3: Customer and channel preferences

The objective of this phase was to ascertain and validate the findings from desktop research undertaken in Phase 2 through consultations.

Stakeholder consultations were conducted with foodservice operators across the value chain.

Additional research and consultations were conducted when required to fully understand criterions for target channels. Research was done through further desktop analysis using sources such as market research reports like IBIS World, Nielson, Tridge, Mintol and Euromonitor.

A key deliverable of this phase was the Segmentation Report.

PRG workshop 2 was conducted in this phase for the PRG to validate the Market Profile and Segmentation Report insights, as well as provide feedback on project progression.

Phase 4: Value chain maps

The objective of this phase was to produce visualised value chain maps that highlight value chain decision making points that need to be evaluated in order to better engage with the foodservice sector.

The maps showcased key touchpoints of the foodservice value chain and produce industry definitions, roles and responsibilities, opportunities and challenges for the horticulture industry across the foodservice value chain, and value chain nuances between foodservice channels including key stages where commercial decision making occurs.

A key deliverable of this phase was the Value Chain Maps.

Phase 5: Recommendations and reporting

The objective of this phase was to provide high-level, indicative actions and activities for strengthened foodservice engagement across horticulture industries, as well as provide key considerations for each category if further action is desired/pursued.

An overarching strategy and opportunity report, including market intelligence and prioritisation outcomes, covering horticulture foodservice market opportunities, as well as a 2-3 page report snapshot for each of the 7 horticulture categories, with key summary insights specific to that product was produced.

PRG workshop 3 was conducted in this phase to validate the Value Chain, Category Snapshot Report and Strategy insights, as well as provide feedback on project outcomes.

Outputs

The four key deliverables for project MT21011 was a Market Profile, Segmentation Report, Value Chain Map, and Market Intelligence Report. A high-level summary of each section of both reports is included below:

<u>Market Profile</u>

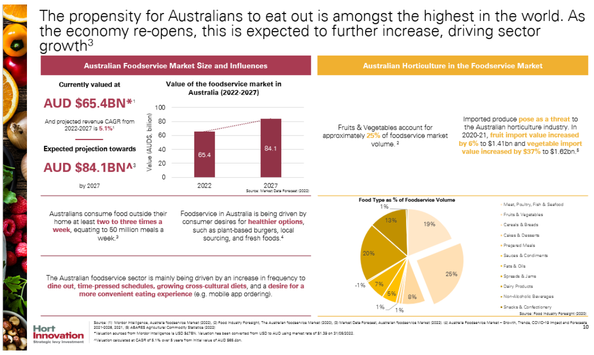
Executive Summary

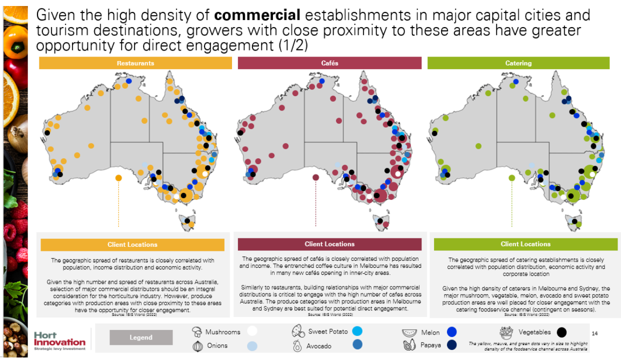
The Market Profile report provides key macro insights (potential needs, considerations and areas of opportunity) of each of the foodservice channels.

Macro Insights of the Australian Foodservice Sector

A macro analysis of the Australian foodservice sector was conducted, providing insights on:

- Australian foodservice market size and influences;
- Australian horticulture in the foodservice market;
- COVID-19 Recovery;
- Foodservice market outlets;
- Supply chain challenges;
- General trends; and
- Foodservice client locations mapped against grower locations.



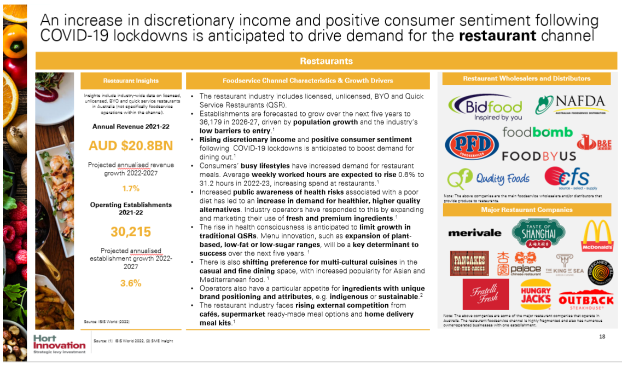


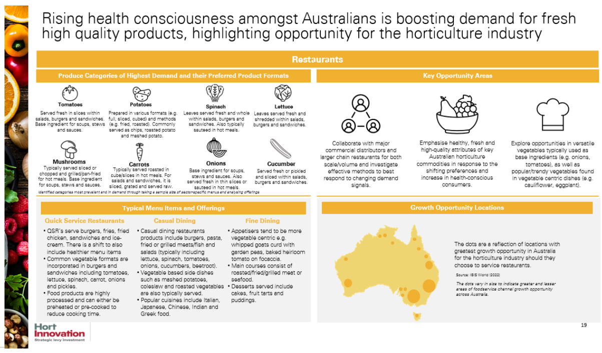
Commercial/Institutional Channel Market Analysis

For each commercial and institutional foodservice channel, a macro market analysis was conducted, providing insights on:

- Key market size statistics;
- Channel characteristics and growth drivers;
- Key stakeholders and clients;
- Produce categories of highest demand in each foodservice channel;
- Typical foodservice menu items and offerings and preferred product formats;

- Potential opportunities for horticulture industries to engage with foodservice channels through activities such as relationship development and education/marketing material ; and
- Foodservice client locations e.g. Café locations across Australia.





Segmentation Report

Executive Summary

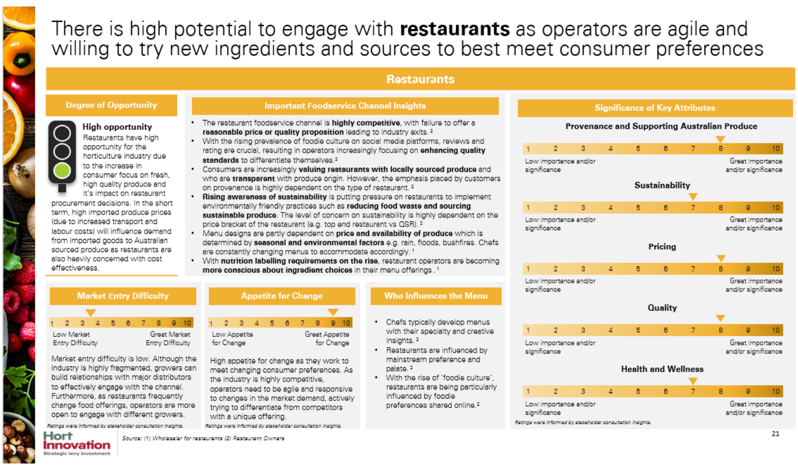
The Segmentation Report highlights information on different preferences of key attributes and categories within each of the foodservice channels (commercial and institutional). As part of this, insights are provided on:

- Foodservice channel growth opportunities and challenges;
- Horticulture industry's opportunities, challenges and risks that need to be considered;
- Market drivers, trends, market entry barriers, attitudes and perceptions, menu influences whilst factoring in procurement decisions; and
- Categories of greatest growth opportunities within each foodservice channel.

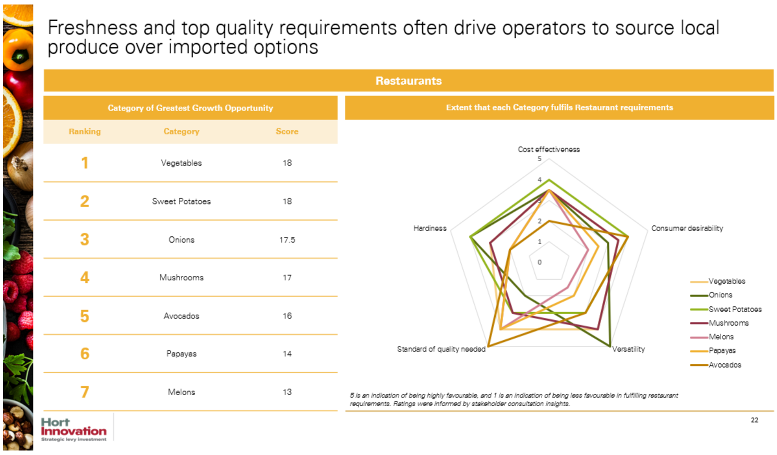
Commercial/Institutional Channel Segmentation

Each of the foodservice channels underwent an assessment that aimed to showcase the fundamental values, attitudes, and perceptions held by the sector. As part of this:

1. Each foodservice channel was assessed on 7 key attributes: market entry difficulty, appetite for change, supporting Australian provenance, sustainability, pricing, quality and health and wellness. Insights were used to rank the foodservice channels in order of greatest relative growth opportunity now and into the future for the horticulture industry as a whole.



2. 5 key factors that are used in the procurement process of produce arose through stakeholder consultations. The factors were gauged as to which categories best aligned to them. Insights were used to showcase how each of the categories suit the requirements of the foodservice channels, relative to one another.



3. Opportunities and challenges for categories and procurement decision influences for each foodservice channel were highlighted.

Value Chain Map

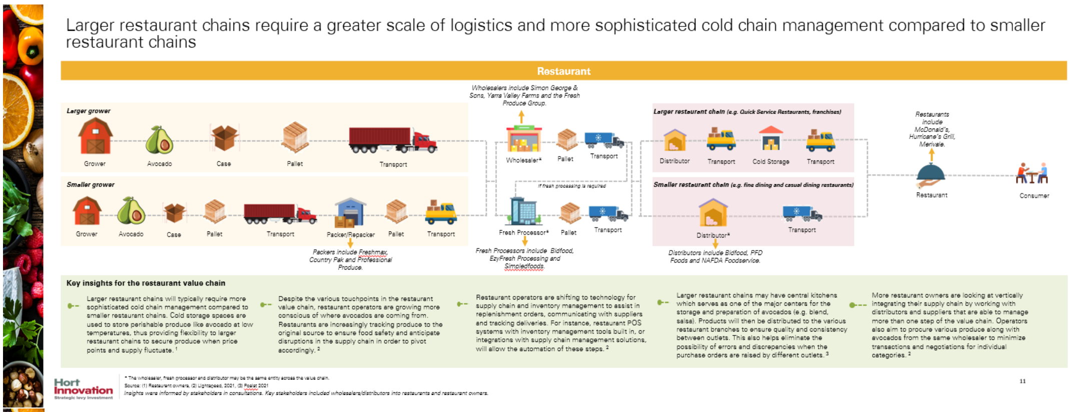
Executive Summary

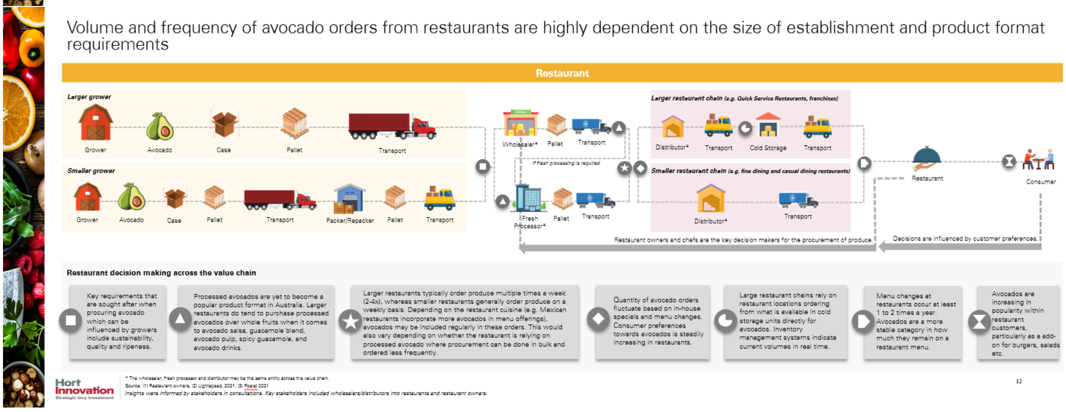
The Value Chain Map outlines the foodservice value chain at a high-level. Horticulture category specific value chains for two selected channels per horticulture category were also analysed. As part of this, insights are provided on:

- Key touchpoints of the foodservice value chain and produce industry definitions, roles and responsibilities;
- Opportunities and challenges for the horticulture industry across the foodservice value chain; and
- Value chain nuances between foodservice channels including key stages where commercial decision making occurs.

Value Chain Maps

Two foodservice channels have been selected by each in-scope horticulture industry to gain further insight into the specific opportunities, challenges, stakeholders and decision-making touchpoints of the value chain. These foodservice channels have been selected based on greatest practical use for each of the horticulture categories in the foodservice sector, leveraging insights from the Market Profile Report and Segmentation report.





Market Intelligence Report

Category Snapshot

For each horticulture category, insights were provided on:

1. Trends in foodservice and alignment of category to these trends

Avocados are fairly limited in their existing use within foodservice, however, meet various criteria that are trending in foodservice

Trends in Foodservice		
Trend	**Description**	**Alignment to Avocados**
Desire for healthy foods[1]	Consumers are becoming increasingly health conscious and interested in foods with additional health benefits, as a way of managing health concerns such as weight and high cholesterol.	✓
Greater demand for locally grown produce[2]	Consumers have an increasing desire to purchase locally grown produce to help strengthen communities and support farmers.	✓
Multicultural flavours are becoming more widely desired[3]	Consumers are desiring more multicultural foods due to a general increasing curiosity of other cuisines. Moreover, due to Australia already being a multicultural society, there is a consistent demand from households of different ethnic backgrounds to purchase foods that are culture familiar.	✓
Increase in fast-casual dining[4]	Fast-casual dining has strong growth prospects over the short, medium and long term. Growth patterns are attributed to the embrace of consumer desires through contactless takeout, drive-thru and at home delivery options.	✓
Continued rise in plant-based foods and ingredients[5]	With more consumers becoming aware of animal welfare concerns, sustainability issues and wanting to be more health conscious, there has been a rise amongst consumers for plant-based foods	✓
Increased focus on ESG (Environmental, Social, and Governance) principles[6]	Consumers are actively seeking foodservice channels that more closely align to sustainability, environmentally-conscious and socially responsible agendas.	✓
Need for produce with longer fresh shelf-life[7]	The airline, Defence and mining foodservice channels particularly require produce with sufficient shelf-life and durability due to the complex distribution and logistical requirements in these channels.	✗
Foodservice channels requiring greater convenience[7]	With cost of labour rising, and labour shortages remaining, more foodservice channels are shifting to value-added produce that minimises the preparation time and efforts.	✗

Hort Innovation Strategic levy investment

Source: (1) Food Navigator, 2020. (2) Food & Drink Business, 2021. (3) Mordor Intelligence, 2022. (4) Allied Market Research, 2021. (5) Food Frontier, 2021. (6) Mondelez International Foodservice, 2022. (7) Stakeholder consultations.

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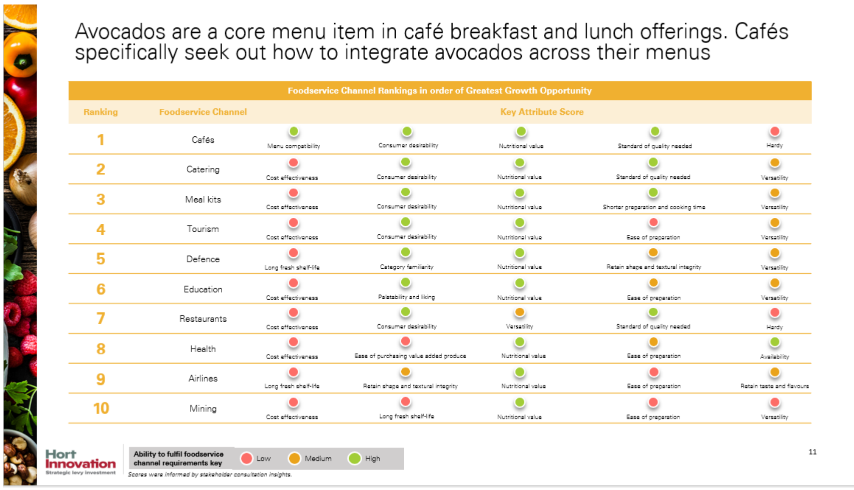
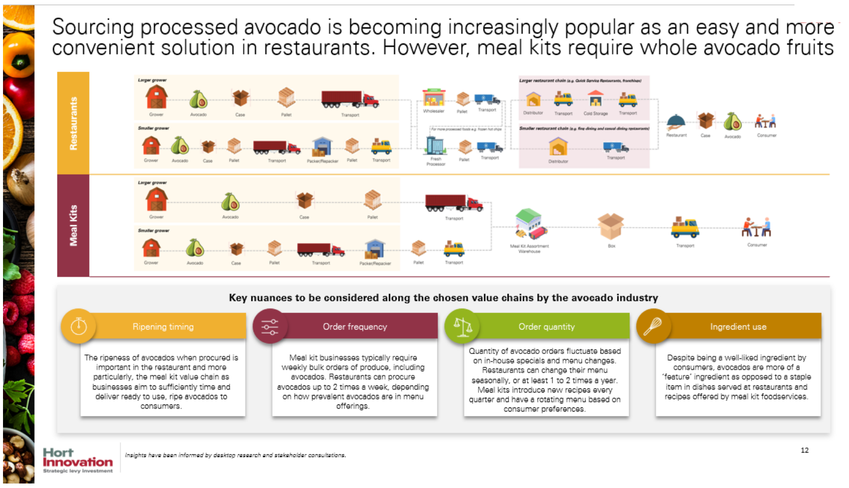
2. Foodservice channel rankings in order of greatest growth opportunity



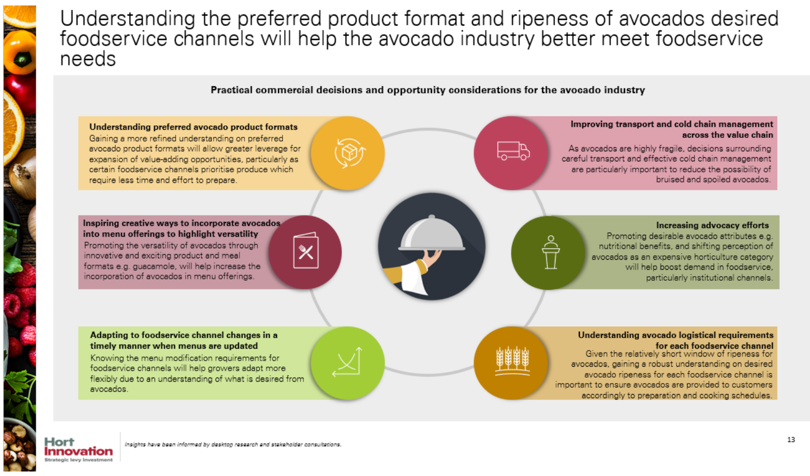
Foodservice Channel Rankings in order of Greatest Growth Opportunity

Ranking	Foodservice Channel	Key Attribute Score				
1	Cafés	Menu compatibility	Consumer desirability	Nutritional value	Standard of quality needed	Hardy
2	Catering	Cost effectiveness	Consumer desirability	Nutritional value	Standard of quality needed	Versatility
3	Meal kits	Cost effectiveness	Consumer desirability	Nutritional value	Shorter preparation and cooking time	Versatility
4	Tourism	Cost effectiveness	Consumer desirability	Nutritional value	Ease of preparation	Versatility
5	Defence	Long fresh shelf-life	Category familiarity	Nutritional value	Retain shape and textural integrity	Versatility
6	Education	Cost effectiveness	Palatability and liking	Nutritional value	Ease of preparation	Versatility
7	Restaurants	Cost effectiveness	Consumer desirability	Versatility	Standard of quality needed	Hardy
8	Health	Cost effectiveness	Ease of purchasing value added produce	Nutritional value	Ease of preparation	Availability
9	Airlines	Long fresh shelf-life	Retain shape and textural integrity	Nutritional value	Ease of preparation	Retain taste and flavours
10	Mining	Cost effectiveness	Long fresh shelf-life	Nutritional value	Ease of preparation	Versatility

3. Key nuances to be considered along the chosen value chains by the horticulture category industry



4. Practical commercial decisions and opportunity considerations for the avocado industry



Market Insights Strategy

Short-, medium- and long-term goals were mapped against 4 strategic pillars. For each strategic pillar, benefits to the horticulture industry, key actions and activities and timeframes were identified.

Alignment to foodservice trends and developments can help the horticulture industry form a unique value proposition for foodservice

Activities to support 'Alignment to foodservice trends and developments' have been identified and mapped across short, medium and long term time frames.

Short term

Objective	Benefit to the horticulture industry	Actions
01 **Alignment to foodservice trends and developments**	• Improve the horticulture industry's ability to effectively use resources and adjust operations where required to respond to foodservice evolvements. • Allow for informed decisions to be made if further penetration across or within foodservice is desired. • Improve ability to plan, predict and forecast short, medium and long term production and value chain related plans that are targeted to expanding outreach in foodservice.	**1.1** Maintain sophisticated understanding of the foodservice market and its value chain through greater monitoring and evaluation efforts. **1.2** Adapt and respond to existing and emerging foodservice channel needs and more general evolutions by understanding and showcasing unique value proposition of horticultural categories. **1.3** Further advance sophisticated understanding of the foodservice market and its value chain.

Short Term <2 years	Medium term 2-4 years	Long Term 4+ years
Alignment to foodservice trends and developments		
Enhance marketing and communications		
Build relationships		
	Optimise supply chains	Optimise supply chains

Hort Innovation Strategic levy investment

Above timelines are highly indicative and have been provided at a high-level. Actions and activities have been informed by desktop research and stakeholder consultations. Further validation by the industry is required as progression is made for individual strategies.

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Trends and developments are a guaranteed constant in foodservice. Aligning horticulture categories to these is a fundamental determinant for success in foodservice

The following table outlines specific steps towards pursuing the 'Alignment to foodservice trends and developments' objective and provides an estimated timeframe for each activity for the industry to work toward.

Action		Indicative activities		Timeframe	Resource investment across horticulture	Impact potential
1.1	Maintain sophisticated understanding of the foodservice market and its value chain through greater monitoring and evaluation efforts.	1.1.1	Remain updated on reports and foodservice market insight documents that are current and updated annually to gain a better understanding of the sector and how it tends to evolve with respect to key commercial areas: price changes, volume requirements, demand factors and market drivers.	6 – 12 months / ongoing	Low	Medium
		1.1.2	Exercise effective communication along the immediate value chain points to understand existing and emerging trends, pressures, and developments at a more micro level across foodservice.	6 – 12 months / ongoing	Low	High
1.2	Adapt and respond to existing and emerging foodservice channel needs and more general evolutions by understanding and showcasing unique value proposition of horticultural categories.	1.2.1	Create a concrete 'list' of distinguishing factors that sets the category apart, but are also characteristics that are advantageous to the developments occurring in foodservice.	6 – 12 months / ongoing	Low	High
		1.2.2	Actively define industry-wide (horticultural category specific) unique selling proposition. Through an understanding of the significance placed on key attributes by foodservice such as provenance, sustainability, pricing, quality and health and wellness, create an industry-wide response that can help mitigate, shift, or strengthen attitudes related to these attributes. Thus, promoting the category's unique value.	1 - 2 years / ongoing	Low	High
1.3	Further advance sophisticated understanding of the foodservice market and its value chain.	1.3.1	Hold half yearly meetings that are actioned, organised and chaired by Hort Innovation with a dedicated foodservice council and/or organisation like foodservice Australia to have foodservice focused discussions aimed at gaining direct insight on arising developments.	1 – 2 years / ongoing	Low	High
		1.3.2	Organise all-of-horticulture-industry town halls that are actioned, organised and chaired by Hort Innovation to discuss key insights, evolutions, changes, trends and drivers being seen across foodservice on a half-yearly basis. These town halls can be conducted after meetings with industry organisations/councils to help provide relevant insight as well as guide fruitful discussion.	1 – 2 years / ongoing	Low	High

Hort Innovation Strategic levy investment

Resource (time and effort) investment required and potential for positive impact to the horticulture industry Low Medium High

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Above timelines are highly indicative and have been provided at a high-level. Actions and activities have been informed by desktop research and stakeholder consultations. Further validation by the industry is required as progression is made for individual strategies.

Outcomes

The key desired outcome for MT21011 was:

- *To help Hort Innovation provide foundational research into the key foodservice channels across both the institutional and commercial streams*

MT21011 has met this core outcome through the following:

- Produced timely and commercially relevant market intelligence reports
- Showcased the current foodservice macro landscape
- Defined who influences menu design and understand what criteria influences their decisions across foodservice channels
- Highlighted the role of provenance and supporting Australian horticulture categories
- Identified what the foodservice sector like and dislike about specific Australian horticulture categories
- Articulated the nuances of each of the channels including requirements (currently met or not met), new or improved product formats, target foodservice 'consumer' segment/s and $ size of opportunity
- Identified targeted opportunities for growers to engage directly and more effectively with foodservice operators

Monitoring and evaluation

MT21011's stated goals have each been met – having reviewed good engagement and feedback from key stakeholders. The outcomes noted in the previous section can be evaluated by tracking against the five key evaluation questions listed in the project's Monitoring and Evaluation plan.

— **To what extent has the project achieved its expected outcomes?**

MT21011 has met the expected outlines listed in the Monitoring and Evaluation plan. Please see the above 'outcomes' section for relevant details as to how the project has met the intended outcomes.

— **How relevant was the project to the needs of the intended beneficiaries?**

Having been engaged at the project Kick Off, the intended beneficiaries actively shaped the project's methodology and outputs by driving the selection of foodservice channels for analysis.

All deliverables were validated with the Project Reference Group at the completion of the project to ensure it aligned with expectations, and requested modifications were actioned accordingly. The proposed structure of the final report was also sense-checked with this group, to ensure the format was relevant for their needs. As such, the reports are clear and concise to ensure accessibility of all industry participants, and that outputs are relevant, practical and helpful to guide the next steps for export growth in the industry.

The project's outputs will equip beneficiaries with knowledge and capacity for industry export development, by identifying commercially relevant insights for growers relating to foodservice relationship development.

— **How well have intended beneficiaries been engaged in the project?**

Stakeholder consultations were effective, informative and gave rise to valuable insights for the project. These included interviews with in-market experts on the nuances of consumer behaviour within foodservice channels, and foodservice operator desires. Hort Innovation received positive feedback from stakeholders for engagement by the Consultant. Timelines were adhered to and stakeholders were engaged within appropriate timeframes to ensure the smooth progression of the project.

— **To what extent were engagement processes appropriate to the target audience/s of the project?**

The consultation methods and timelines were flexible enough to cater to grower needs. These meetings took place virtually and enabled strong input from the Project Reference Group. This was an important factor especially in the selection of the foodservice channels for analysis. Virtual engagement was sufficiently prepared to ensure discussions engaged each participant. The virtual format of delivery was engaging and informative through the use of visual aids, including for example graphs and maps which show how foodservice across Australia has performed in recent years.

— **What efforts did the project make to improve efficiency?**

Several conscious decisions were made to allow the project plan to be executed effectively and to maximise time and resources efficiently.

Firstly, the delivery team was selected in order to improve execution of the project. Team members with specific previous experience in the horticulture sector and/or with trade and export experience were resourced, which enabled prior knowledge to be appropriately leveraged and built upon. The team was informed on key resources in which to scan for country profiling, ways to analyse export data, and best practice for engaging with horticultural stakeholders.

Documents were shared with Hort Innovation and the Project Reference Group with enough time to allow review and feedback, and meetings were scheduled with enough lead and flexibility to prepare and include all participants.

Risks and challenges were identified and addressed in a fast and transparent manner and were mitigated accordingly. Risks identified throughout the project included:

- Delayed feedback from Hort Innovation that there was no internal foodservice stakeholder list that could be provided
- Delayed stakeholder responses to conduct consultations

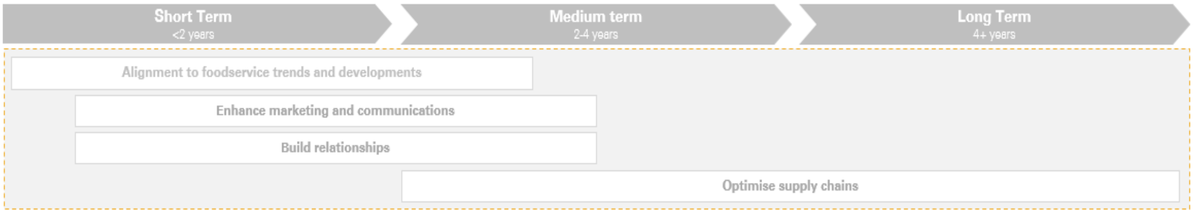
- Delayed feedback from Hort Innovation and Project Reference Group (PRG) regarding project deliverables

Despite challenges from the COVID-19 environment and inability to travel, this allowed further efficiencies for the project. This led to efficiencies relating to eliminated travel costs and other expenses, and the ability to seamlessly engage stakeholders in other countries.

The project approach was also deliberately phased, with key stage-gates or objectives set for each of the major phases. This was designed to ensure that the project was process driven and robust in how it approached the industry's requirements. As a result of clear timelines being laid out in the project plan, this ensured that the project ran more efficiently and was delivered on time, to budget, and effectively. Providing the team with set goals for each phase ensured that MT21011 was completed in a logical manner.

Recommendations

Given that MT21011 comprises Strategy and a Category Snapshot Report containing category-specific considerations a set of recommendations were included.



Strategic pillars for industry upon the completion of MT21011 are as follows:

- **Alignment to foodservice trends and developments**: Strategic alignment to existing and emerging foodservice trends and developments can improve the horticulture industry's ability to position themselves to supply foodservice. Greater awareness and monitoring of foodservice changes can equip the industry with robust knowledge on price changes, volume requirements, market drivers and additional demand factors that can uplift the industry's capability in responding to market movements more effectively and showcasing a category's unique value proposition.
    1. Maintain sophisticated understanding of the foodservice market and its value chain through greater monitoring and evaluation efforts.
    2. Adapt and respond to existing and emerging foodservice channel needs and more general evolutions by understanding and showcasing unique value proposition of horticultural categories.
    3. Further advance sophisticated understanding of the foodservice market and its value chain.

- **Enhance marketing and communications**: Foodservice stakeholders have emphasised a fundamental way in increasing specific horticulture industries' presence and utilisation across foodservice is through better understanding and knowledge of the produce. Thus, allowing greater demand generation from foodservice channel operators and consumers. Advocating and marketing that aligns to the specific trends and attributes that are becoming increasingly prioritised within foodservice channels such as Australian-grown, sustainability, pricing, quality and health and wellness, can further promote horticultural categories within foodservice.
    1. Utilise ESG credentials to showcase how the horticulture industry has responded and is continuing to respond to environmental, social and governance principles and developments to convey social responsibility. This is becoming an increasingly important criteria amongst foodservice channel operators and their consumers.
    2. Create a marketing and communications plan that is validated by foodservice value chain stakeholders, consumers and in-market professionals to increase likelihood of promotion success. Tailor communications to emphasise key attributes that are highly valued and demanded by foodservice channels.
    3. Organise practical educational programs across targeted foodservice channels that aim to inform and increase awareness of various categories more broadly.
- **Build relationships:** Relationship development with active participants across the foodservice value chain and within the foodservice channels themselves are key in leveraging opportunities to grow in prioritised foodservices. Direct contact is required as it is a very competitive market landscape in supplying to foodservice, particularly in commercial channels where a premium exists.
    1. Establish a foodservice industry stakeholder engagement plan.
    2. Foster relationships with key operators throughout the value chain such as wholesalers, distributors, food processors, and foodservice players to encourage bilateral communication and exchange of information regarding the desires and requirements of consumers and foodservice operators.
- **Optimise supply chains:** Finding means to shorten lead times and build critical domestic volumes to key foodservice channels has been highlighted by foodservice and horticulture industry stakeholders. This can help

preserve produce quality and reduce costs across the value chain which is key for highly cost conscious foodservice channels.

1. Invest in research and development to improve produce consistency pre and post farm-gate to satisfy the requirements of foodservice and drive profitability.
2. Reduce lead times through consolidating processes at certain foodservice value chain touchpoints.
3. Leverage the outcomes of research and development in new and innovative product formats and varieties to increase produce shelf-life pre and post-farm gate in order to unlock different value chain options and further preserve produce quality.

Refereed scientific publications

There are no refereed scientific publications published during the reporting period that can be attributed or partly attributed to the project.

References

The references used in MT21011 are detailed in the footnotes of the each of the project deliverables.

Intellectual property, commercialisation and confidentiality

No project IP, project outputs, commercialisation or confidentiality issues to report.

Acknowledgements

We would like to acknowledge the following industry stakeholders, who participated in interviews and workshop sessions during the project:

Name	Organisation/Role
Tiernan Brady	Downer
Adam Forbes	The Produce Wholesaler
Danny Russo	Russolini Group
Paul McArthur	Defence Subject Matter Expert
Curtis Davies	Airline Subject Matter Expert
Rosanna Isanno	Childcare Caterer
Ross Cosentino	Produce Wholesaler
Alison Steele	Café owner
Jack George	Simon George & Sons
Elizabeth Armstrong	Ibis Care
Tamlyn Huynh	Convenience Meal Export
Robert Sabongi	Corporate Caterer
Francis Loughran	Mining foodservice consultant
David Mallon	Mining foodservice consultant
Wayne Solomon	Seagrass Boutique Hospitality Group
Sam Allen	Sofitel foodservice
Paul Ragg	PRG – Papaya Industry Rep
Anthony Joseph	PRG – Melon Industry Rep
Kees Versteeg	PRG – Onions and Vegetables Industries Rep
Hayleigh Dawson	PRG – Avocado Industry Rep
Tim Archibald	PRG – Mushrooms Industry Rep
Damien Botha	PRG – Sweet Potatoes Industry Rep

Appendices

There are no appendices to this document.