

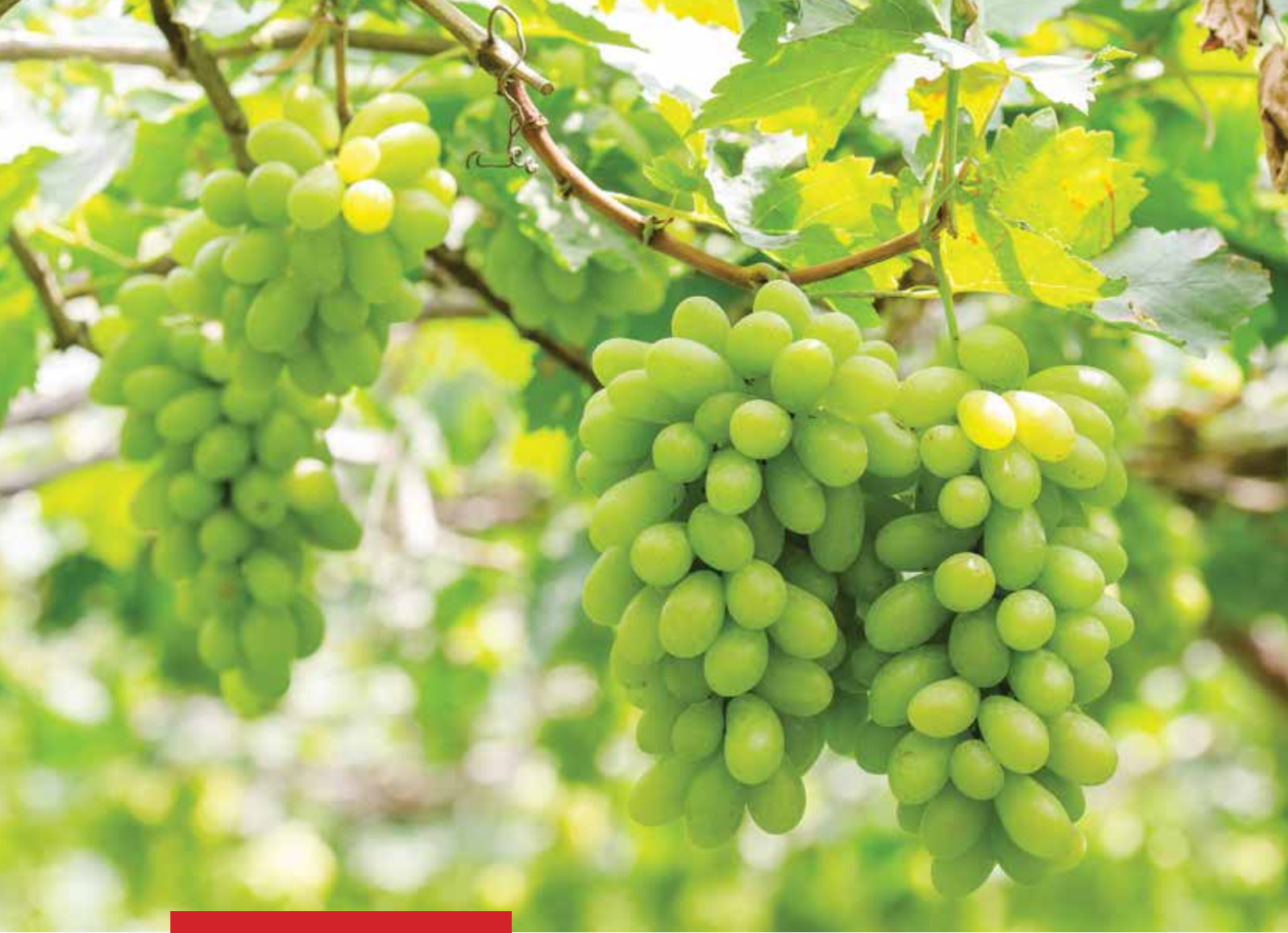
Vine MAGAZINE

Rethinking pest management

INSIGHTS & OPPORTUNITIES

DFA WELCOMES
new CEO

VOLUME 21 ISSUE 4 DECEMBER 2025 | RSG: WHAT WE'VE LEARNED
INDUSTRY INSIGHTS | FUTURE OF MECHANISED PRUNING



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 Picture: David Sickerdick

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For further publication details, see page 38

A note from the team

As we near the end of the calendar year and head toward the holiday season, crops are taking shape and growers are planning for the remainder of their growing season.

In table grapes, there's optimism around this year's table grape crop, though challenges such as Restricted Spring Growth, pest pressure and rising input costs are still front of mind.

In the dried grape industry, Dried Fruits Australia has welcomed new CEO Justin Lane, who introduces himself in this edition and talks through his vision for the future of the industry.

We wish all a safe and happy holiday season.

FACTORS DRIVING PRODUCTIVITY

Hort Innovation has released its *Factors driving horticulture productivity* report.

The project (HA24004) report delves into the factors driving productivity within the sector.

Productivity is a major driver of economic performance, resilience, and sustainability of activities within the horticulture industry.

The project provides the horticulture industry with a comprehensive framework for understanding

how productivity is defined, measured, and influenced, allowing for more strategic analysis and decision-making.

Read the report here:



**Hort
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WANT TO MAKE SURE YOU'RE SEEING WHAT WE'RE SAYING?

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That's it – Facebook will now show ATGA posts higher in your news feed so you're less likely to miss important updates.

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4. Instagram will now send you a notification when we post.

INDUSTRY CONTINUES TO TAKE AIM AT QFLY

Dried Fruits Australia has developed and released a film to highlight Queensland fruit fly management in dried grape vineyards.

The film includes tips for monitoring, baiting and for ongoing vineyard practices to reduce Qfly numbers.



Watch it here:



A NOTE ON THE 2025 TOP CROP AWARDS

Unfortunately, due to a lack of entries, this year's Dried Fruits Australia Top Crop Awards will not proceed.

The awards are a way to highlight the Australian industries best producing businesses, in terms of both yield and quality.

The awards are also the basis for learning from fellow growers about what works when it comes to productive dried grape production.

Keep an eye out as DFA reviews the awards for next year, including a simpler process for submitting entries.





DFA ANNUAL REPORT OUT NOW

Dried Fruits Australia's 2024/25 Annual Report is out now.

The report, available to read online, showcases the activities and achievements of the peak industry body throughout the past financial year.

The report was presented at the DFA's AGM held late November.

Read the report here:



BUILDING KNOWLEDGE AND ENGAGEMENT

A new levy-funded table grape industry communications program is now in motion, with ATGA to drive stronger information delivery and grower engagement over the next five years.

We'll soon be calling for growers and other industry stakeholders keen to be part of a reference/engagement group to help us understand what you want – and how you want to hear from us.

Have an idea? Contact ATGA communications manager Terryn Milner by emailing tmilner@atga.net.au



HAVE YOUR SAY

It's time for dried grape growers and industry members to have their say on Dried Fruits Australia's industry communications.

If they haven't done so already, industry members are urged to complete the survey at <https://www.surveymonkey.com/r/X2BCR8T> to help shape the future of dried grape industry communications.

The communications project is funded by Hort Innovation using dried grape levies and funds from the Australian Government.

Complete the survey here:



DID YOU KNOW?

When you see a Hort Innovation funding block in the *Vine*, industry newsletter or other communications outputs, that means your grower levies are at work! Look for funding blocks to identify industry levy-funded investments, or visit horticulture.com.au to find out more.

Hort Innovation TABLE GRAPE FUND

Hort Innovation DRIED GRAPE FUND

Hort Innovation DRIED TREE FRUIT FUND

LOOK OUT FOR THESE LOGOS



RSG: REPORT, SAMPLE, GATHER!

Well, RSG might not stand for that, but that's exactly what we've done. Catch up on the ATGA's investigations on pages 16–17.



HAVE A STORY YOU'D LIKE TO SHARE?

Want to nominate a grower profile? Let us know!

Contact Terryn at ATGA for table grape news e: tmilner@atga.net.au

Contact Megan at DFA for dried grape news e: communications@driedfruitsaustralia.org.au





Rethinking pest management

US INSIGHTS & AUSTRALIAN OPPORTUNITIES

In a Mildura vineyard, two proactive producers stand among the vines alongside visiting US pest management expert and entomologist David Haviland. Both producers are keen contributors to Australia's table grape industry – curious and forward-thinking in their approach to evolving industry challenges.

As Australian producers face reduced chemical availability through regulatory change and rising input costs, Rocky Mammone and Jordan Adams are determined to arm themselves against one of their biggest “bug” bears – refining pest management programs through practice change to strengthen their long-term business sustainability.

As David, Rocky and Jordan walk the vineyard rows, they crouch down to inspect the trunks and peel back the bark, where pests like long-tailed mealybugs like to hide. They find a few – alongside a lacewing, one of their natural enemies. It's an eye-opening moment that reminds them the vineyard is alive and dynamic. There is some uneasiness that comes with seeing the pests, but it is quickly followed by acceptance, determination and optimism – to plan, act and to measure success. Early detection, after all, is where effective management begins.

David has spent two decades developing and disseminating integrated pest management (IPM)

programs to Californian horticulture producers in the San Joaquin Valley – growers who have faced the same challenges now emerging in Australia. His insights offer a glimpse of what's ahead, but also highlight the possibilities that change can unlock, if growers are ready to embrace it.

The conversation soon moves well beyond a single pest. It becomes a broader discussion about rethinking pest management itself – building sustainable businesses and resilient products in an evolving world.

Australian technical service providers have long encouraged IPM and IPDM adoption as regulatory shifts and sustainability goals drive a rethink of on-farm practices. Likewise, as part of the Australian Table Grape Association's Optimising Spray Application workshops and video series, Alison MacGregor and David Manktelow have highlighted the importance of understanding the Four Ts – target, timing, treatment and technique.

It's these same principles that David Haviland reinforces.

“The future is about integrating – monitoring, understanding the biology of the pests, understanding the treatment you're using and targeting the weaker stages when you know they're susceptible,” he said.

“As you use products that are more sustainable, that surgically target specific pests, you open other opportunities related to biological control – natural enemies. It's that combination of using nature to combat nature, with intervention only when needed.”







He offers a simple analogy.

"I assume you have cockroaches in Australia," he laughed. "But from a homeowner perspective, you don't control cockroaches by spraying pesticides around your house. You put screens on the windows, thresholds under the doors, you keep the pet food contained, wash your dishes and take out the garbage – all of those things combined are really the management program.

"So, if you do have to use a pesticide, it's a last resort, and only when necessary, using the safest types of products.

"That's exactly what farmers are doing – trying to understand the pest, prevent it from spreading, grow the crop in a way that pests can't thrive, use the good bugs to control the bad ones, and as a last resort, use a pesticide that won't eliminate the beneficials.

"It's the same thing," he added, "but on a much grander scale. You need to think of it as a military-type endeavour – outmanoeuvring and out-strategising your opponent with surgical strikes."

Growers' reflections

For Jordan, the experience reinforced his views of pest control as a strategic, season-long process rather than a reactionary task.

"The biggest takeaway for me has been learning we need to treat mealybug

– and other pests – like a program," he said. "We need to target the right stages, we need to treat mealybug – for instance – like powdery mildew. We need to time the application of treatments appropriately.

"The mentality needs to change – we need to be one step ahead of mealybug and other pests."

Rocky agreed that while losing chemistry options could be seen as losing tools, it also created space for innovation.

"David really opened our eyes to thinking about this issue in a different way. Scout early and often, apply the right treatments at the right moment and promote the good bugs to do some of the heavy lifting. We're already seeing the difference.

"As growers, we want to grow fruit as sustainably as we can, and hopefully keep our businesses as profitable as possible."

Change as opportunity

The transition away from certain agrichemicals originally brought frustration for Californian producers.

"The average attitude has been frustration at losing tools – and that's part of the process of change. Fear of the future is normal," David said.

"What I'm really excited to see from Australian growers is when

the day comes that they say, 'Wow, look at all the opportunities that have opened up to us now because we've become more sustainable.'

"Some of those will be marketing, some biological control. When change happens, it gives you the chance to revisit the situation.

"Ultimately, farming is a business – and the business model is changing, driven by both farmers and consumers."

He added that communicating these efforts is just as important as implementing them.

"Any time you can share the story of what you're doing to promote biological control and non-chemical alternatives, you're not just improving sustainability – you're also improving your ability to market your crop."

Learning in the field

The vineyard visit reinforced how monitoring and observation underpin every good management program. It's not just about finding pests – it's about understanding them.

The discussion showed that effective pest management is about more than protecting a crop. It's about redefining what it means to run a sustainable, resilient business – one that adapts to change, earns consumer trust, and strengthens markets for the long term. ❖



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Justin to lead DFA at exciting time of growth

Dried Fruits Australia (DFA) has welcomed its new chief executive officer Justin Lane.

Justin brings with him decades of experience in horticulture and industry extension, and steps into the role following Thomas Cheung's departure after three years with the organisation.

Justin said he looked forward to getting involved, connecting with growers and the broader industry, and helping to progress the industry.

"It's good to see the industry starting to bounce back and it's exciting to step into the role at this time. There are a lot

of opportunities for growth," he said.

"That is one of the things I'm most excited about stepping into this role."

DFA chair Mark King welcomed Justin to the role and said his experience in the horticulture sector would be an asset to the dried grape industry.

"Justin's parents Mick and Susie were citrus and dried fruit growers at Coomealla," Mark said.

"I remember meeting Mick in the 1980s. He was drying gordos on the rack and was known for the large crops he grew."

Justin is proud of his historic ties to the dried grape industry,

with both his grandfather and father growing dried fruit.

"I helped out Dad for a long time on the block – after school, on the weekends and school holidays," he remembers.

Mark said Justin was well-known in Australia's dried grape growing region across northwest Victoria, southwest New South Wales and into South Australia.

"He has great communication skills and has been in the agricultural sector for some years," Mark said.

"He is well connected with other peak industry bodies and has also been involved in marketing overseas.



"I am sure he will be a great asset for DFA and we are fortunate to have him as our new CEO."

Justin grew up in Coomealla and, after graduating from Coomealla High School, picked up a technical assistant role with NSW DPI at the Dareton Research Station.

It was during this time he completed his Agricultural Science degree with Charles Sturt University, with a focus on horticulture and irrigation.

He later worked as an extension officer with the former Sunraysia Water Authority before moving to a farm management role.

Most recently, Justin worked as an extension officer with Mildura Fruit Company for about 11 years, and had a shorter stint as regional business manager with Muirs.

Justin said these roles helped him form strong connections with growers and industry personnel across the growing district, as well as an understanding of some of the important issues affecting growers.

"I already know a few growers in the area, as well as our producer members on our board, but I'm looking forward to getting to know more growers and industry staff and to do the best job I can to assist

continued progress, development and growth of the industry," he said.

Growers took the opportunity to meet Justin at a field walk event in Merbein late October.

Stephen and Malcolm Bennett opened their property to industry to take a closer look at how mechanised pruning impacts the cordon.

The Bennetts have been using a lidar-guided mechanised pruner for several seasons.

The event was funded by Hort Innovation through dried grape research and development levies and funds from the Australian Government. ❖





MRL app's new phase

A major achievement this year has been the release of the upgraded MRL app for table grapes and, importantly, its full integration into the ATGA Exports Online system.

While an existing MRL app has supported growers for several seasons, this new app and its connection is the real step forward.

By bringing the MRL tool directly into the export workflow, the system strengthens compliance, improves market readiness, and gives growers and exporters clear, accessible residue guidance at the exact moment they need it.

Our main goal when developing the new app was to create a seamless experience.

When registered growers log into the ATGA's Exports Online portal or app, they'll now see a dedicated button directing them straight to the MRL search function.

Producers can check market-specific residue limits while preparing documentation, updating crop monitoring records, or completing pre-season compliance

requirements. It reduces confusion and double-handling, as well as places all essential information in a single, consistent platform.

Crucially, the upgraded MRL app continues to serve the wider industry – not just registered grower-exporters. Any grower, agronomist, supply-chain partner, or stakeholder can access it simply by downloading the Exports Online app and completing a quick registration. This broader access helps build a shared understanding of residue requirements across the whole sector.

The new app delivers fast, market-specific MRL searches for all major table grape export destinations. You can compare a shortlist of chemicals and/or markets. Information contained in the app is automatically updated every night with data feeds directly from FoodChainID, ensuring it is always current. This reduces risk and helps us as an industry and Australia as a leading horticultural exporter maintain its reputation as a trusted, compliant supplier.

This integration marks another important milestone in modernising digital tools for the table grape sector. By connecting systems rather than creating new ones, we're strengthening export preparedness, improving

everyday usability, and laying a foundation for the next phase of digital integration across the industry.

The original ATGA MRLs Search app will be decommissioned as of December 2025, so we encourage everyone to download the new app as your production season advances.

Looking forward, we hope everyone has a safe and happy festive season and a productive season ahead. ❖

Hort Innovation TABLE GRAPE FUND



Jeff Scott | CEO



Spring push on pests

Pest and disease management remains front of mind for the ATGA team.

This spring, we helped the Fruit Fly Murray Valley (FFMV) Regional Advisory Group secure Victorian Government funding to support area-wide management of Queensland fruit fly (Qfly). The project will allow FFMV to employ an industry development officer through to 1 December 2026 – great news for producers across the Murray Valley.

We worked with Hort Innovation to support renewal of the APVMA permit for trichlorfon as an option for fruit fly control.

To keep up the effort on the ground, we also coordinated another round of MAT cup distribution at cost price, helping growers across greater Sunraysia stay on top of Qfly numbers in vineyards.

When the chance came up to host Californian entomologist David Haviland, we jumped on it. We organised three well-attended sessions for growers and agronomists in Sunraysia, where David shared practical insights from more than 20 years of experience about mealybug control and integrated pest management (IPM) strategies that can be adapted for Australian vineyards. The interactive discussions – both in the shed and in the vines – sparked valuable local conversations about what's working and what's not.

Restricted Spring Growth (RSG) syndrome is still a concern for table grape producers across the Murray Valley this season. We facilitated a think tank of agronomists, breeders, researchers, analytical laboratories and grower representatives. While there's no silver bullet yet, a few promising

lines of enquiry have emerged. If you've been trialling anything related to RSG, we'd love to hear from you.

In August, we travelled to South Australia to catch up with producers keen to show us their vineyards, new plantings and local innovations. Then, in October, we headed further west – this time to Western Australia – to host an industry forum. The session covered the 2024–25 season outlook, export updates, the new MRL app and more. Guest speaker Greg James from Rural West Counselling Service shared valuable insights on long-term financial planning and succession – topics that hit home for many in the room.

We also appreciated being able to visit some vineyards and meet with industry consultants and WA's Department of Primary Industries and Regional Development staff.

Behind the scenes, we've been in plenty of conversations with service providers and researchers on everything from sea freight logistics and emerging pest control technologies to data platforms and protected cropping systems.

We've also been representing industry on a number of topics across a range of workshops, advocating for growers' needs, giving industry-specific input and obtaining information relevant to industry.

All in all, it's been a busy and productive few months – with plenty of collaboration, problem-solving and planning to help keep the industry moving forward. ❖

Alison, Jenny & Karen
ATGA industry development team

Hort Innovation **TABLE GRAPE FUND**





Positive signs for season ahead

A note from our chair

I would like to welcome Justin Lane to Dried Fruits Australia.

I am sure Justin will bring his own views on how to make our industry grow.

From growing up on a dried fruit and citrus property at Coomealla, and then working in the citrus industry, and with Muirs, he already knows many growers and is keen to meet many more.

Once again last year's old Sultana crop wasn't what I had hoped for, and we have taken the opportunity to cut off four acres.

Growers need to look at yields and if they are not getting around three tonnes to the acre (more than 7t/ha) you are wasting money.

The new varieties – Sugra39, Sunglo and Sunmuscat – look good.

We are continuing to plant varieties that show not only higher yields but are more consistent in the cropping.

DFA has been approved to release Murray Muscat, complementing the release of Murray Bold, which had about 25,000 vines planted this year.

If you are thinking of replanting in 2026, there are many new high-yielding varieties out there.

Speak to your nurseryman or call into DFA and have a talk with Michael or Justin.

Time will tell if we can match or exceed last year's 18,500 tonnes.

News from our CEO

It is great to be stepping into this role with Dried Fruits Australia and I look forward to the challenge, and representing our growers, processors/marketers and industry as a whole.

It is good to be coming off a strong year with the 2025 crop the highest crop since 2017, with a harvest of 18,556 tonnes.

With good weather through the drying season, the quality of the fruit was also very good.

A summary of the total harvest intake by variety can be found in insights (pages 22-23).

There are exciting times ahead for our industry, with some new varieties being planted and growers being innovative with efficiencies in on-farm trellis systems and pruning techniques to help with labour savings.

We have our 1ha Dried Grape Production Systems project going ahead at the SuniTAFE SMART Farm at Cardross, which will evaluate a number of the newer varieties and different trellis systems for these varieties.

Being 1ha, and with the limited project funding, there will be a limit as to the number of varieties and trellis types that will be able to be practically assessed within the project.

I'm looking forward to this project and working together with our industry development officer Michael Treeby and the Project Reference Group to see this come together.

Qfly will be an issue in the vineyards as the fruit begins to go into veraison and the berries start to soften.

Communications manager, Meg Frankel-Vaughan, and Michael have put together a YouTube video (which has been circulated) to help explain how to manage Qfly in your vineyards with baiting, trapping and monitoring.

We also have access for DFA grower members to the GrapeWatch disease alert system, so reach out to Robyn at our DFA office if you would like to be set up with these alerts to your mobile phone or email.

All the best for the rest of the growing season.

Hopefully the weather is kind to us with low disease pressure and we can again see some good yields and quality.

If you are not already a DFA grower member, I encourage you to reach out to our office to join or to talk to me about how we as a peak industry body can help advocate for you and the future of the industry. ❖



Mark King | Chair



Justin Lane | CEO



Nutrient timing key for development

Some appreciation of the likely crop load will be starting to form.

The total number of bunches per vine was set about this time last year, though cleaning up the cordons and topping bearers just below the bottom fruiting wire will have reduced that number a bit.

It'll be a question of making sure as many flowers as possible have set fruit and making sure they all remain to develop.

There'll have been some losses on Sunmuscat due to shatter, and further berry losses can result from Queensland fruit fly damage.

Floral buds for next season's crop will already have formed.

At this stage, they're just a few cells that have decided to be bunches later on rather than leaves or other shoot bits and pieces.

Environmental factors (e.g., light and temperature) play a role in that decision making process, but the newer varieties seem less sensitive to shading compared to the old Sultana.

The vine's physiological status is also important, and here we can take that to mean its nutrient status – especially, nitrogen and phosphorus – and how well watered it is.

The important point here though is that excessive amounts of fertiliser and overwatering are counter-productive because shoot growth is over stimulated; long internodes means that some fruitful nodes will likely be trimmed off next season's bearers next winter.

How do we judge whether we're getting it right?

Assessing vigour is one way. A useful index is the average internode length

of the first 10 internodes or so along healthy shoots that'll be bearers next season; ideally, an average internode length of about 100mm, or another way to think of it is that each internode should be about the same width as your flattened hand, more or less.

A more objective way is to sample petioles from leaves opposite basal bunches at 50 per cent cap fall, have them analysed in a NATA-accredited laboratory, and compare the data back from the lab to the industry's interpretive standards.

It is a good way of assessing whether vine yields are limited by vine nutrient status, but also whether there could be some costs saving without compromising vine performance.

Try to remember here that the total annual fertiliser supply is only part of the story; when it is supplied is as important.

Water supply

Allocations for entitlement holders in northwest Victoria, southwest NSW and across in SA are currently 100 per cent.

Irrigators in the Goulburn Lower on the other hand are contending with just over 50 per cent and low reliability and general security entitlement holders are looking at zero or very low allocations.

Let's not forget too that some large permanent plantings don't have high reliability water covering their whole annual water needs and need to buy temporary water.

The likelihood of there being a spill declaration is currently low, meaning that there is only very low chance of water in an entitlement holder's spillable water account being lost.

The price for temporary water out of Victoria's Zone 7 and NSW's Zone 11 is hovering around \$310/ML.

Cleaning up cordons

A field walk in late October provided an opportunity for producers to hear first-hand about different mechanical approaches to cleaning up the non-fruiting side of cordons.

The chief concern expressed was the production of good replacement canes.

Cost savings and infection of freshly exposed cordon tissue taken back to fresh wood were also raised.

The latter is not with precedent in the region, but very rare.

The cost saving with each system were discussed and the further development of one – the LIDAR-guided pruning head – by La Trobe University mentioned.

Another aspect mentioned was the operational complexity of each system and that highlighted the on-going development of the LIDAR-guided pruning unit by the university partner. ❖

Michael Treeby
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Hort Innovation **DRIED GRAPE FUND**





Restricted Spring Growth

WHAT WE'VE LEARNED (2021-25)

Restricted Spring Growth (RSG) is one of the most challenging and widely discussed issues Sunraysia table grape producers have faced over the past four seasons.

First reported to ATGA in early October 2021, the syndrome has since prompted significant investigation across industry, and among research partners and international experts.

How it began

In the first week of October 2021, growers alerted ATGA to unusually slow and uneven shoot development across multiple varieties and properties. As that period is normally marked by rapid shoot expansion, the symptoms quickly raised alarm. Within days it became clear that the issue was widespread, and many producers faced the prospect of considerable yield loss for the 2022 harvest.

Some growers made the difficult decision to remove entire plantings soon after symptoms appeared, concerned the condition might spread and that the cost of carrying non-productive vines through a full season would be too high. At that point, the cause of RSG was unknown, and there was little local or global precedent to draw on.

ATGA response and diagnostics

Throughout the 2021-22 season, ATGA redirected significant resources to understanding RSG. The team:

- visited vineyards and listened to growers' theories
- surveyed growers about cultural and production practices
- instigated an urgent amendment to the levy-funded national extension

project to receive 12 months of additional Hort Innovation funding to support vine health, in particular, investigating possible causes of RSG

- collected vine tissue (foliage, shoots, trunks, roots) and soil samples
- submitted material for testing across laboratories in Victoria, South Australia, NSW and internationally
- hosted multiple online and in-person sessions with producers, agronomists and researchers to discuss RSG, diagnostics, and emerging research
- collated and reviewed literature to gather global insights
- established a community of practice (a network) to link viticulture experts across industries and met regularly with viticulture experts and consultants to discuss potential causes

Testing covered a wide range of possibilities – viruses, fungi, bacteria, phytoplasmas, mites and nematodes. A total of 378 diagnostic reports were issued back to the individual growers who submitted samples. De-identified results were shared at grower, agronomist and consultant sessions. That feedback helped shape ongoing investigation priorities.

Physiology and carbohydrate trials

In 2022-23, ATGA explored whether differences in vine carbohydrate reserves might be linked to the appearance of RSG. In the first year, root and leaf samples were collected at three growth stages from one trial site. The samples were analysed overseas for total carbohydrates (starch and sugars). Across all categories, symptomatic and non-symptomatic vines showed no statistically significant differences.

The first trial site was abandoned due to vine removal and a second trial site, established one year later,

was eventually discontinued as too many cordons were accidentally removed during pruning.

Micronutrient and hormone-related effects were also investigated by measuring chlorophyll levels before and after foliar treatments. These trials did not produce conclusive results.

A new fungus in Australian grapes?

In 2024, the fungus *Quambalaria cyanescens* was detected in vines from one Sunraysia property exhibiting RSG symptoms – the first record of this fungus in Australian grapevines. ATGA then submitted eight further RSG-affected samples for specialist testing, but none returned positive results for *Quambalaria*. Its role, if any, in RSG remains unclear.

What we've learned from overseas

RSG-like symptoms are not unique to Australia. Comparable disorders have been documented in:

- **Chile:** Restricted Spring Growth Syndrome
- **USA:** Delayed Spring Growth (DSG)
- **South Africa:** Growth Arrestment Phenomenon (GAP)
- **Iran:** RSG-type symptoms associated with *Quambalaria* fungi.

Across these regions, symptoms share strong similarities with those seen in Sunraysia: delayed and stunted shoots, poor inflorescence development and reduced early growth vigour.

However, one notable difference is that darkened pith often observed in Australian vines is not commonly reported elsewhere. The dark pith is likely a secondary effect rather than a primary cause.

Key overseas insights:

- **USA (UC Davis):** Cold events and bud dehydration appear central to DSG. Links have also been found between DSG and overcropping, late harvest and excessive late-season growth.

- **Chile:** Water deficit in autumn and late entry into dormancy increased the likelihood of RSG symptoms in spring. Researchers also observed differences in xylem and cambium development, and consistently lower arginine levels in affected vines – pointing to a physiological, rather than pathogenic, cause.

- **Iran, USA and Mexico:** *Quambalaria* has been isolated from vines showing esca-like symptoms, but always alongside multiple other organisms, making its role uncertain.

- a. cold damage and bud dehydration
 - b. water stress or delayed vine lignification heading into dormancy
 - c. crop load and late-season canopy management
 - d. vascular or carbohydrate imbalances.
3. is the set of symptoms we see when a pathogen interacts with stress-inducing physiological factors

Any potential pathological cause must be confirmed by conducting a test where unaffected vines are intentionally

infected to see whether this leads to expression of RSG symptoms.

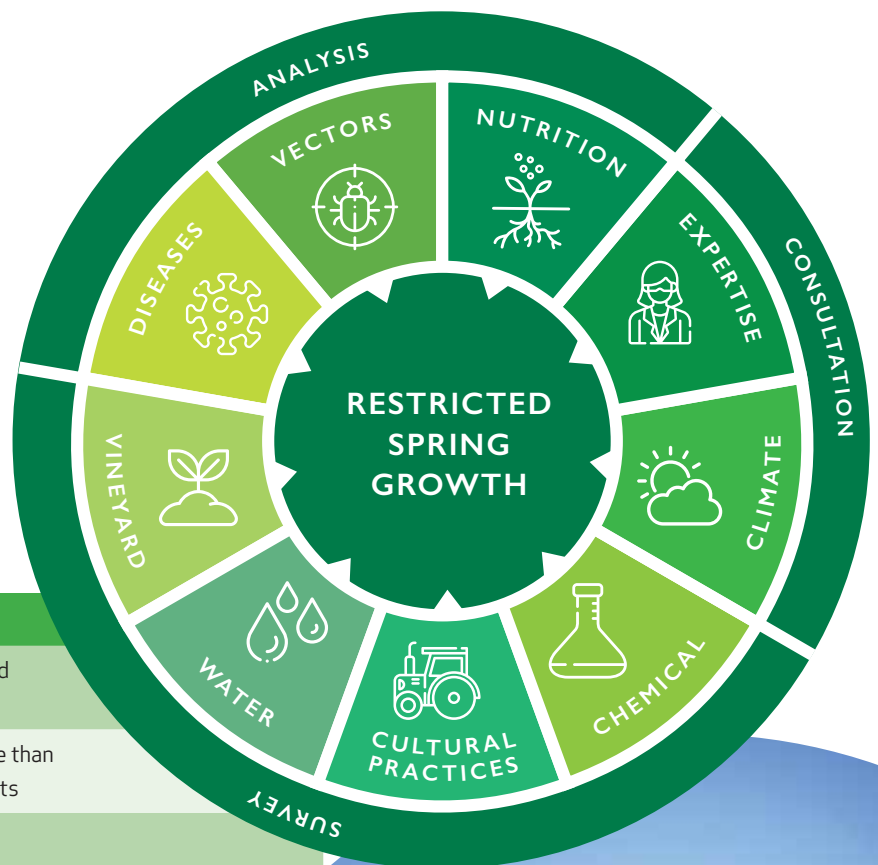
While uncertainty remains, each year has brought new insights and a clearer picture of the likely drivers. ATGA will continue working with industry as well as national and international researchers to refine understanding and identify management approaches that may reduce risk. ❖



Where this leaves us

After four seasons of investigation, the possibilities remain that RSG:

1. has a single pathological cause (not yet identified)
2. is a complex physiological disorder, with contributing factors such as:



INVESTIGATION AT A GLANCE	
Field inspections	51 producers provided 362 samples
Consultation	18 sessions with more than 20 research specialists
Surveying	38 vineyard patches
Sampling	218 leaf & shoot, 36 root & soil, 8 trunks, 100 budsticks for phytoplasma, fungi, yeast &/or bacteria, trunk disease, root pathogens, soilborne pathogens, micronutrient and carbohydrate readings, possible vectors (nematodes, mites) analysis
Readings	900 Chlorophyll readings
Reporting	Test results disseminated to all 51 producers who provided samples
Sharing information	10 sessions attended by 131 agronomic consultants 7 sessions attended by 171 producers
Trials	Sites established to study carbohydrate and micronutrient uptake
Comms	13 articles in the <i>Vine</i> have featured or provided updates on RSG. Four editions of <i>Pick of the Bunch</i> included information about RSG





Future of mechanised pruning

Researchers involved in developing a prototype mechanised pruner for dried grape vineyards hope to continue the project to make it accessible industry-wide.

The Dried Fruits Australia's industry mechanised pruner project – run in collaboration with La Trobe University and Mallee Regional Innovation Centre – finished with a final prototype in August 2022.

Now, La Trobe University Professor Robert Ross has shared insight into the project and how it could be developed further.

"The system is currently a prototype system which works, but could be significantly improved, made more user-friendly, more robust and with improvements around vine detection and cutting speed," he said.

"The end goal is something growers can use and retrofit onto their tractors."

Dr Robert Ross was among presenters at Dried Fruits Australia's Grower Forum in late November, where he outlined the project, and offered a glimpse at potential next steps.

The project has also attracted the attention of growers in Italy, who want to use the Australian system alongside a prototype they have developed for mechanised pruning.

"This is very early stage. We haven't yet met, but they are looking to use a modified version for semi-automatic pruning of table grapes and so it shows potential beyond the dried fruit industry," Dr Ross said.

The pruner was on display at a recent DFA-hosted field walk at Stephen and Malcolm Bennett's Merbein property, where growers had a chance to see the impact of the lidar-guided system on the cordon.

A point of discussion was the system's ease of use, or the ability of other growers to be able to implement a similar system in their vineyards.

The team is waiting on results of two grant applications to continue the project, with the aim of refining it for wider use.

An analysis of potential cost savings was undertaken when the final prototype was developed, and showed the mechanical pruner could save up to two-thirds of the time associated with manual winter pruning, while reducing costs by up to \$1000 per hectare. ❖

Above: Prototype mechanical pruner.

Opposite page - Left: Grower David Lyons, Dr Robert Ross and former DFA industry development officer Stuart Putland working on the project in 2021.

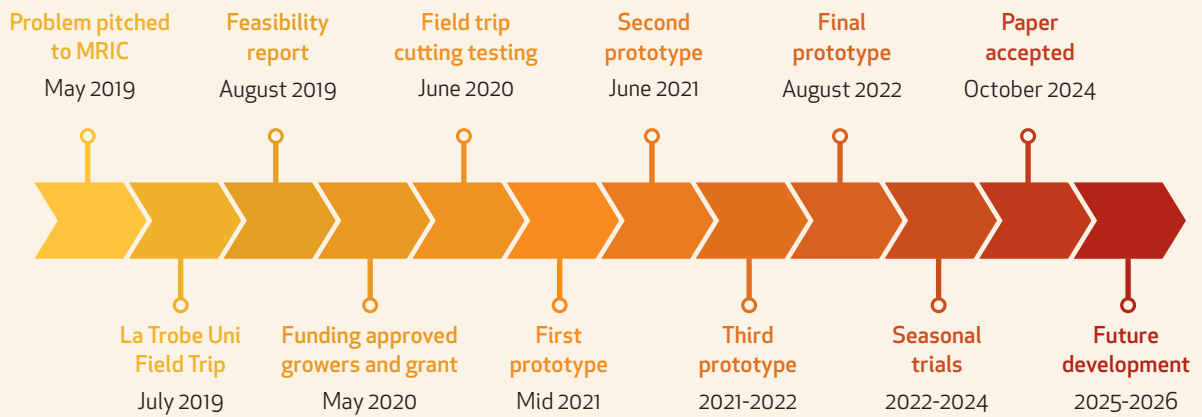
Centre: La Trobe University's Professor Robert Ross working on the pruner prototype in 2021.

Right: La Trobe University's PhD student Matt Felicetti talks to the crowd at a DFA field walk highlighting mechanised pruning with a prototype mechanical pruner.

Hort Innovation **DRIED GRAPE FUND**



TIMELINE OF PRUNER PROJECT



Vines available for delivery - Spring 2025	
Red Globe / Ramsey	2 year old
Selma Pete / Ramsey	2 year old
Sunmuscat / 1103 Paulsen	1 year old
Pinot Noir MV6 / 1103 Paulsen	1 year old

Now taking orders for spring banded vines for delivery Spring '25 and dormant vines for delivery Spring '26

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Bee sting

THE VARROA MITE INCURSION IS A BIOSECURITY WARNING

Australian dried tree crops are reliant on pollination for good fruit set. The Varroa mite incursion threatens this process and has further wide-reaching implications. This article highlights the importance of biosecurity responses and measures to attract native pollinators.

When the varroa mite was first detected in Australia in 2022, many outside the beekeeping and horticultural industries viewed it as a nuisance – a distant problem for a few farmers.

This was dangerously naive.

In breaching our perimeter, the varroa mite has created a strategic vulnerability.

The mite, which attacks bees, reminds us that Australia's island geography no longer shields us from biosecurity threats.

Biosecurity is a foundation of our food security.

As Australian Strategic Policy Institute (ASPI) analysts have consistently argued, food security is an indispensable part of national security.

Penetration of our defences by a threat like the varroa mite can destabilise markets and the very resilience and prosperity of rural and regional Australia.

A nation unable to reliably feed itself faces diminished strategic power and internal fissures that can be exploited in an era of heightened competition.

A recent Rabobank report, *How varroa mites might impact Australian pollinators*, chillingly analyses this strategic exposure.

It details how pollination demand has tripled since 1990, while commercially

managed beehives have stagnated.

The number of available pollinators is dangerously close to the minimum required to sustain key food production industries.

This is where the varroa mite incursion, which we're no longer trying to eradicate, becomes a national security consideration.

Rabobank's analysis highlights that countries such as New Zealand and Canada experienced an approximate 8 per cent decline in hive numbers within four to five years of varroa mite outbreaks.

Modelling indicates pollination in Australia could fall substantially below demand within three to five years.

The Australian Honeybee Industry Council has already warned of a national bee shortage for the vital almond pollination season.

The incursion has far-reaching consequences. Increased beekeeping costs, driven by the varroa mite, raise pollination fees, squeezing producer margins and undermining regional economies.

Declining pollination leads to domestic food shortages, price volatility and potentially social unrest.

Such biosecurity failures are a tax on national bandwidth and increase pressure on agricultural industries that already provide substantial cash investments, often via unmatched biosecurity levies.

The varroa mite exposes a strategic blind spot where defence and security policy has not adequately integrated agricultural biosecurity.

We cannot rely solely on our geography. Biosecurity must be treated as a multi-layered, whole-of-nation framework, continuously updated, exercised and funded as

earnestly as military capabilities.

As the National Defence Strategy makes clear, national defence is a coordinated, whole-of-nation approach, harnessing all aspects of our national power, including economic resilience and secure supply chains.

In a world where adversaries probe weak seams, resilient food systems deter as effectively as ships, planes and satellites.

We must move beyond viewing biosecurity as solely an agriculture problem for farm gates, border checkpoints, or the chiefs of biosecurity alone.

The path forward requires a fundamental mindset shift, elevating biosecurity to a core national defence function.

This could start with establishing national command and accountability, perhaps through a standing National Biosecurity Coordination Council in the Department of Prime Minister and Cabinet and chaired at deputy-secretary level.

It could drive the National Biosecurity Strategy's implementation, whereas past review recommendations remain largely unfulfilled.

We must also build an improved sovereign detection and rapid-response capability with high-throughput genomic sequencing at ports and hubs, deploying on-farm diagnostics and standing up surge teams with sufficient authority.

Speed is paramount, so approvals, indemnities, and compensation triggers must be templated in peacetime.

Furthermore, we must diversify pollination sources and harden supply chains. Treating pollination as critical infrastructure means supporting managed hives, incentivising backup providers and accelerating research into complementary pollinators.

Major horticulture producers should maintain robust pollination contingency plans.

A critical opportunity lies in biologicals and biotechnology. We need to embrace next-generation tools, such as biological controls and genetic sequencing for rapid threat identification, and genetic engineering for innate resistance.

While state and territory scientists are talented, their work often faces inconsistent funding.

Research and development corporations with substantial, publicly matched budgets could strategically invest in biosecurity to avoid fragmented outcomes.

Such investments will enhance protection and develop sovereign industrial capability for long-term resilience.

The long-term cost of inaction would far outweigh the upfront investment. This is a strategic calculation. We need to build these capabilities at home rather than relying solely on international partners.

We should also align incentives and compliance, making it easier to do the right thing and enforcing consistency.

Public money should buy down risk,



not subsidise its persistence. Finally, we should conduct regular national biosecurity wargames with realistic features, such as labour shortages, cross-border movement, supply chain disruption and misinformation.

Current crisis exercises, such as Ex Convergence, are useful, but industry and states should not have to push for inclusion. We should publish exercise debriefs. We should do for pests and pathogens what we do for fires and floods.

The varroa mite has breached our perimeter and its full impact is yet to be realised.

This could be a moment of truth for our national resilience. We cannot afford complacency. A national biosecurity strategy, modelled with the same rigour as national defence planning, is an imperative.

Australia's food security and our national defence depends on it. ❖

This piece was written by Andrew Henderson, the principal of Agsecure and a senior fellow at ASPI, and was first published in The Strategist, and has been reprinted with ASPI's permission.

Image credit: Rebecca Niver/Unsplash.

Pollination and pollinator-friendly plantings

National Pollination Industry coordinator Rebecca Sloan has created a series of factsheets to help inform pollination-dependent industries on best practice.

Pollination and pollinator friendly plantings explains how pollination by managed honeybees can be supplemented by wild pollinators and how integrated management of honeybees and a diversity of alternative pollinators may enhance crop performance.

The factsheet states growers can attract wild pollinators through

landscape management and preserving native flora, through pesticide management or by planting alternative forage in unused or unproductive areas of the paddock or orchard.

Planting a cover crop is an option for growers to attract wild pollinators into the targeted crops and provide alternative forage sources for all pollinators.

It explains what a companion planting is, and some of the additional benefits besides pollination. It also reminds growers to consider the outcomes they are trying to achieve as it will dictate the species used and when they plant.

Companion planting can be planted between the rows of tree crops and

can be broken down into five major groups – legumes, annuals, brassicas, perennials and grasses. These can be used singularly or in a combination.

The most critical factor to success is timing.

Planting too early or too late will mean missing the targeted flowering window.

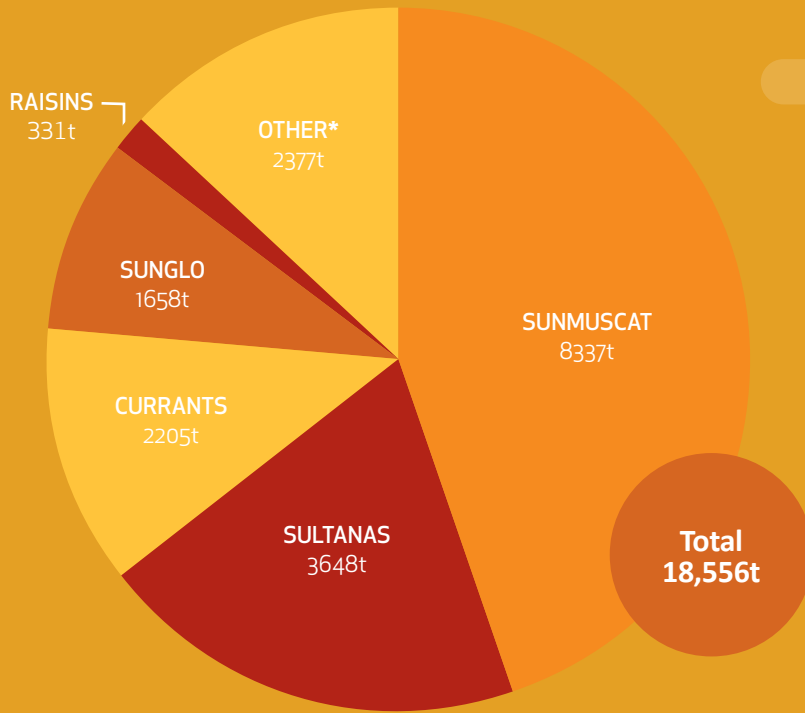
There are also other factors to consider such as rainfall and competition to the target crop.

This is a précis version of the fact sheet. The full version and resources are available at <https://www.varroa.org.au/>



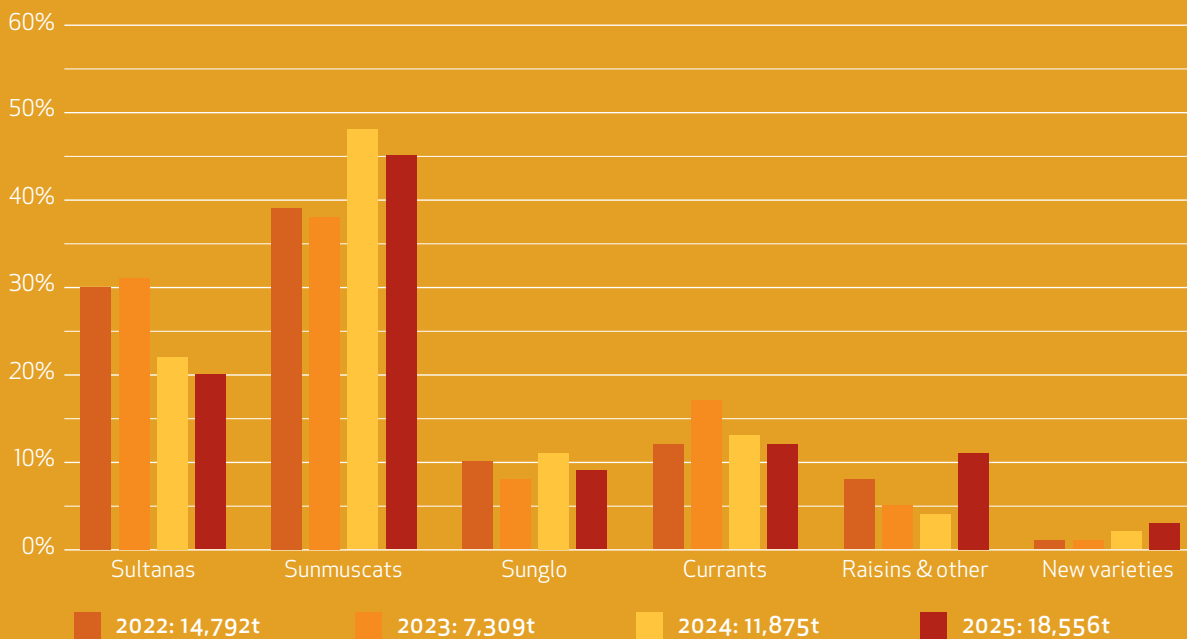
Dried grape crop report by variety

2025 AUSTRALIAN YIELD BY VARIETY



AUSTRALIAN VINE FRUIT CROP INTAKE

% of crop intake by variety 2022 to 2025





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Domestic table grape consumer insights

Grapes recorded strong dollar sales and volume growth this year of +18.6% and +21.4% respectively, outperforming results at a fresh fruit market level across both metrics.

Volume gains are likely driven by a lower average price per kilogram this year (-2.3%), while fresh fruit prices overall increased by +6.1%.

Purchase behaviour



10kg
per buying household

\$6 spend per occasion
\$63.50 average spend
Almost 11 eating occasions

75%

household penetration

3 year high with 75% of households purchasing at least once

Volume growth observed across all household types

non-family adult households remain lighter

Retail channels

Non-major supermarkets grew fastest, but all retail channels registered growth. Online sales grew faster than brick-and-mortar stores.

All retail channels registered growth in grape dollar and volume sales, with non-major supermarkets growing the fastest.

Online sales grew faster relative to bricks and mortar stores, driven by new households to this channel.

There is room to develop this further, however, given only 4 in 10 online fruit buyers will purchase grapes.

At a glance

Value: +18.6%

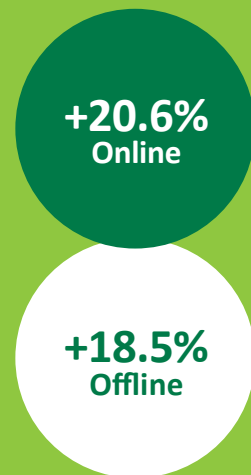
Volume: +21.4%

Price per kg: -2.3%

GRAPES PER KG % CHANGE



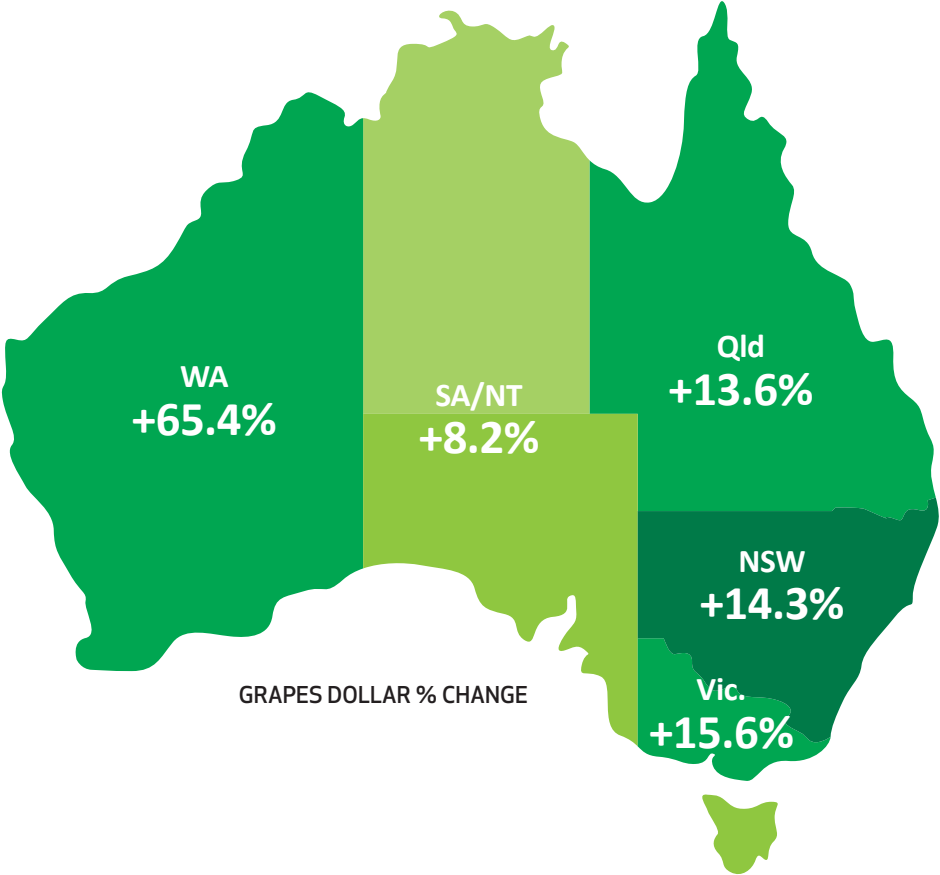
DOLLAR % CHANGE



Volume & growth

All states recorded dollar sales and volume growth this year however performance in WA was the strongest.

TOTAL AUSTRALIA +18.6%



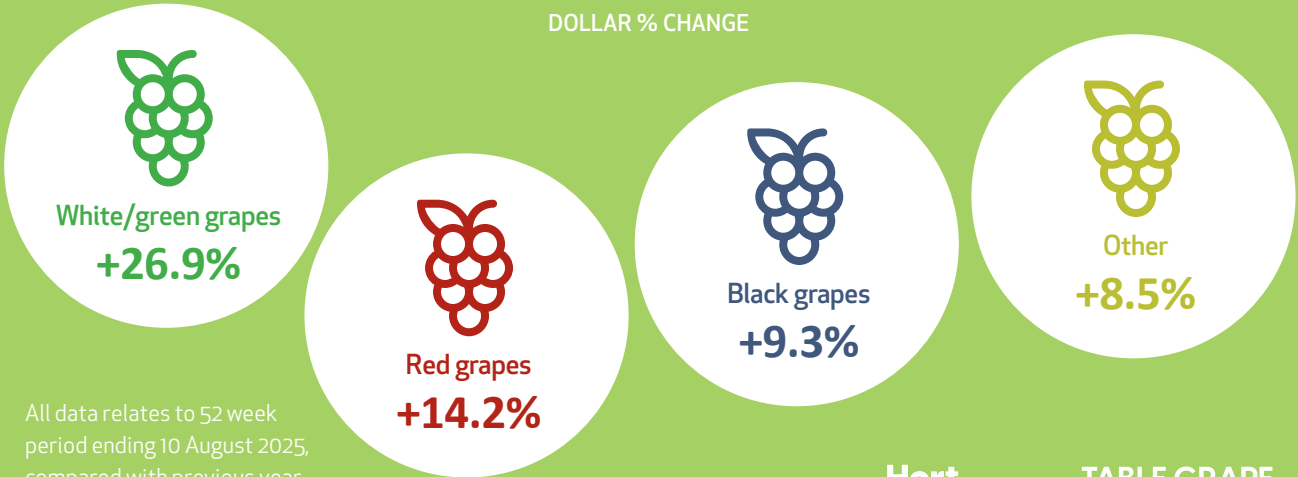
Selection criteria

White/green grapes led the gains, with growth further boosted by more frequent purchases.

Prepacked grapes surpassed loose pack, by penetration, for the first time in 3 years.



DOLLAR % CHANGE



All data relates to 52 week period ending 10 August 2025, compared with previous year. Data source: NielsenIQ Homescan



The Mallee's changing landscape

A report released this year has highlighted the table and dried grape industries' changing landscapes.

Mallee Catchment Management Authority (MCMA)'s 2024 *Mallee Horticulture Crop Report* was published in June this year.

The report, authored by Sue Argus, is a continuation of a series of triennial crop reports first produced in 1997 with the aim of accurately measuring irrigation status and development in the Mallee catchment.

The Mallee catchment has irrigated horticulture along the Murray River from Woorinen South to the South Australian border and in the Murrayville Groundwater Management Area (GMA).

Overall findings:

The irrigated area across the Mallee catchment in 2024 was 185 hectares less than in 2021. This is the first of the triennial crop reports since 1997 that recorded a decrease in irrigated area since the previous report.

From 2021 to 2024 was also the first triennial period with a net decrease

(-45 hectares) in almond plantings.

There were few new almond plantings in this period and a small percentage of trees died in wet conditions associated with the 2022 Murray River flood event.

Crop types 2024

The top ten crop types in the Mallee catchment in 2024 were:

1. almonds, 26,365ha (30%);
2. table grapes, 11,115ha (13%);
3. wine grapes, 7400ha (8%);
4. citrus, 5330ha (6%);
5. winter field crops, 4,795ha (5%);
6. olives, 3755ha (4%);
7. potatoes, 2730ha (3%);
8. fruit trees other than olives (mainly avocados and stone fruit), 2055ha (2%);
9. dried grapes, 1965ha (2%); and
10. vegetables other than carrots and potatoes, 1855ha (2%).

Crop type changes from 1997 to 2024

The dominant crop type across the Mallee catchment was wine grapes from 1997 to 2006, then

almonds from 2009 to 2024.

The main new plantings between 1997 and 2024 were almonds, table grapes and olives.

Almond plantings increased by 24,620 hectares, from 1745 hectares in 1997 to 26,365 hectares in 2024. Table grapes and olives increased by 6965 hectares and 3600 hectares respectively.

The largest removal of plantings from 1997 to 2024 was dried grapes and wine grapes, with a net decrease of 4365 hectares and 2575 hectares respectively.

Crop type changes from 1997 to 2024

Wine grapes were the dominant crop from 1997 to 2006, then almonds from 2009 to 2024.

The main changes in crop types from 1997 to 2024 were:

- almond trees increased by 24,620ha, a 1411% increase from 1745 to 26,365ha;
- table grape plantings increased by 6965ha, a 168% increase from 4150 to 11,115ha;
- dried grape plantings decreased by 4365ha, a 69% decrease from 6330 to 1965ha;



- olive trees increased by 3600ha, a 2323% increase from 155 to 3755ha; and

- wine grape plantings decreased by 2575ha, a 26% decrease from 9975 to 7400ha.

New permanent plantings (planted or top-worked in the previous three years)

In 2024, 6055ha (10%) of permanent crops in the Mallee catchment had been planted or top-worked within the previous three years. These new crops were mainly table grapes and citrus:

1. table grapes (2240ha);
2. citrus (1060ha);
3. pistachios and walnuts (a total of 690ha);
4. almonds (610ha);
5. dried grapes (395ha);
6. fruit trees (365ha, including avocados, stone fruit and mangos);
7. olives (335ha);
8. wine grapes (310ha); and
9. nurseries and tree plantations (a total of 50ha). ❖

Table grape plantings continue to grow in Victoria's Mallee

Table grape plantings in Victoria's Mallee region have increased by almost 7000ha over the past 27 years. These figures exclude production across the river in Coomealla/Wentworth, Paringi and Euston in NSW.

Between 2021 and 2024, 2200ha of new or top-worked plantings were added. This includes replanting or top-working to different varieties, so it reflects development activity rather than changes in total area or crop type. The figures are likely conservative, as top-worked vines can be difficult to distinguish from aerial imagery collected every three years.

ATGA CEO Jeff Scott said growers in the Mallee had been proactive in production planning, removing unproductive vines and patches in favour of new or more stable or productive varieties, helping to maintain productivity and vineyard resilience.

Strengthening dried grape productivity

Dried grapes in the Mallee catchment currently account for 2% of the irrigable area, but the region produces the majority of dried grapes in Australia.

Nearby New South Wales and South Australia produce the remainder of the nation's dried grapes.

From 1997 to 2024, dried grape plantings decreased by 4365ha, a 69% decrease from 6330 to 1965ha.

Dried Fruits Australia chair Mark King attributed the drop in plantings to the boom in both wine and table grape industries.

However, he said the decrease in plantings did not represent the current strength of the industry.

"Thirty years ago, things looked very different. The industry has improved production in many ways, including trellis systems, new varieties and general vineyard management," Mark said.

"Where we once would have been producing 5 tonnes to the hectare, growers are now capable of producing well over 10 tonnes. We can be far more productive with the plantings that are there."

Mark said the dried grape industry experienced a somewhat rapid drop in plantings, but that seemed to have plateaued in recent years, and he was pleased to see there were nearly 400ha of new or top-worked dried grape plantings in the Mallee catchment over the previous three years.

Read the full report here





Shaping your future

YOUR LEVIES, YOUR R&D ROADMAP

In the last edition of the *Vine*, you met the many faces at Hort Innovation who manage projects funded by your levies. But have you wondered how levies are collected and then invested by Hort Innovation?

This edition, I'm here to talk about how the levy system works.

At Hort Innovation it's our job to work with industry to invest your levy and Australian Government contributions into initiatives to help growers be as productive and profitable as possible.

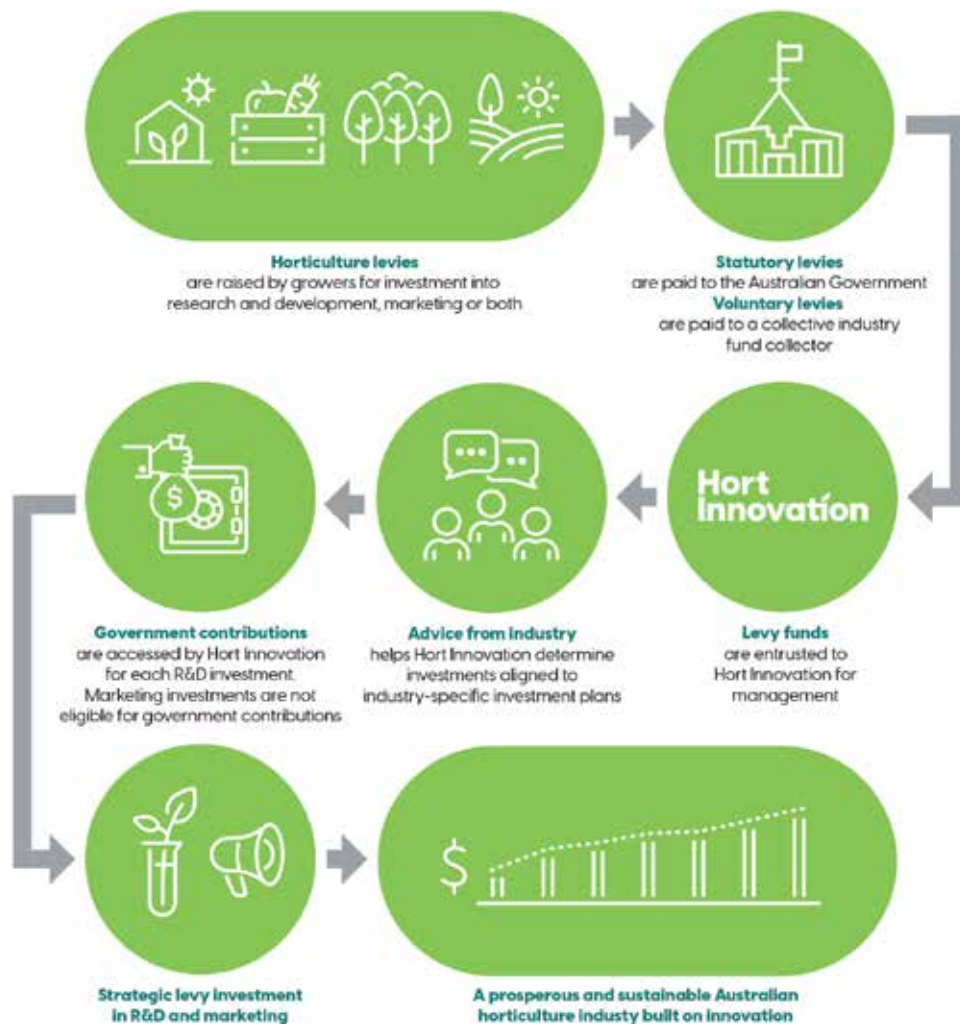
The main tactical purpose of Strategic Investment Plans (SIP) – otherwise known as the R&D (and marketing) investment roadmap – is to optimise profitability and sustainability of the Australian horticultural industry through programs that:

- build capability to innovate on farm
- develop export markets and maintain international competitiveness through quality
- improve production efficiency and accelerate the application of best management practices (BMPs)
- increase the production area whilst managing plant health and longevity, efficiency and productivity

- supplies consistent, high-quality fruit for consumers
- use robust industry biosecurity systems.

Hort Innovation has the responsibility to work with each horticulture industry (37 in total) to make strategic investments in R&D and marketing programs specific to your needs and priorities, like those listed above. All levy investments involve consultation with and advice from industry, delivered through industry-specific Strategic Investment Advisory Panels (SIAPs).

The benefits of the investments that are made go directly back to the industry from which the levy was collected. The



most important function of the SIP is to make sure that levy investment decisions align with industry priorities.

The diagram below describes the model.

The current SIP will mature in June 2026, and together we are working with industry to refresh and to reflect the current needs of your R&D and marketing goals for your industry. It's also an opportunity to identify what's missing and have a say to shape how your levies are invested and help develop a new roadmap with new outcomes, strategies and key performance indicators for your industry for the next 5-year period. ❖



Nicole Byrnes, Industry Service Manager | Hort Innovation

Hort
Innovation

Your call to action

I'm inviting growers and industry stakeholders to complete a brief poll, which reviews the current investment roadmap and identify new areas of focus. Scan the code on a phone or tablet to access the form and have a say on how your levies are invested!

DRIED GRAPE SIP POLL



DRIED TREE FRUIT SIP POLL



TABLE GRAPE SIP POLL



PRUNE SIP POLL



It takes no more than 5 minutes of your time. Simply check the boxes you best agree with of the current topics that you would like projects to continue in (multiple boxes can be selected for each question) and add your ideas if something is missing. The poll will remain open for the remainder of the year.

I'm looking forward to working together and appreciate your input in guiding your roadmap – after all these are your levies and your R&D roadmap. I look forward to launching your new plans in July 2026 with you all.



ATGA welcomes new board members for 2025/26

The Australian Table Grape Association (ATGA) held its 2025 Annual General Meeting on 18 November, where delegates appointed regional grower association representatives and reviewed objectives for 2025/26.

The ATGA board welcomed new Victorian delegates Robert Albanese and Mark Zappia, while farewelling Adrian Cordoma and Don Albanese. Regional grower associations nominate members to the ATGA board, ensuring local challenges are integrated into a national approach. Each state has one vote on matters requiring a decision.

Welcoming Mark Zappia & Robert Albanese

Mark Zappia has been farming since leaving school, running the family farm in Robinvale with his brother after their father retired.

"The passion for farming has always been there," he said. "You're only one minute away from disaster, but the lifestyle is good at the same time."

With roughly 25 years of experience, Mark is focused on the industry's future.

"We hope family farming continues. We want to see this industry here well into the future," he said.

Did you know?

ATGA does not have individual members. Its members are the regional grower associations. To be nominated as a delegate to the ATGA board, growers must be members of their regional association.

Despite rising expenses, modernisation pressures, water challenges, labour management, and pest control, Mark and his family remain committed to a sustainable, resilient industry for future generations.

Robert Albanese's story is very similar. Like Mark, Robert breathed farming as a child, growing up on his family's table grape and avocado property.

After high school, Robert chose to work on the farm – and he's been there ever since.

Robert's 25-year career has seen him take on not only production but also

advisory roles external to the farm – he currently sits on the Lower Murray Water Strategic Advisory Committee, and the Robinvale and District Table Grape Association board.

Robert said he was excited to see "fresh faces" on the ATGA board.

"We can handle all the protocols thrown at us, and worker shortages," he said. "The biggest challenge in the future will be water. I'm looking forward to working with the other board members, and addressing problems and hopefully coming up with solutions." ❖

Regional grower associations

Growers can join their local association to have a say in local and regional industry issues. Most associations meet 2–5 times annually.

Sunraysia Table Grape Growers Association
President: Dominic Sergi
Contact: 0418 534 658

Robinvale & District Table Grape Growers
Acting president: Joe Garreffa
Contact: 0407 310 491

Grape Growers of Western Australia Association
Chair: Robert Sorgiovanni
Contact: 0407 085 818

South Australia
Representative: Bill Avery
Contact: 0477 808 377

Want to get involved? Contact your local association to become a member and contribute to shaping the industry.

2025/26 ATGA board members

CHAIR

Jeremy Boyd, Victoria.

DEPUTY CHAIR

Rocky Mammone, Victoria

Joe Garreffa, New South Wales

Anthony Cirillo, New South Wales

Dominic Sergi, Victoria

Robert Nugan, Victoria

Robert Albanese, Victoria

Mark Zappia, Victoria

Bill Avery, South Australia

Kyle Lovreta, Western Australia



Work underway to reduce compliance burden

Compliance has become one of the biggest pressure points for producers running a modern horticulture business.

Many producers now work across multiple programs and markets, often juggling several certification bodies just to move fruit through the supply chain. The duplication, paperwork, and cost add up – fast.

Table grape industry impact

In a recent ATGA survey of more than 90 grower respondents, compliance and regulatory burden ranked third out of seven, in terms of greatest concern to their business, behind profitability and labour.

More than 75 per cent of respondents highlighted that the time required to complete certification tasks was their biggest challenge, followed by the cost (67 per cent), duplication (48 per cent) and overwhelm/load (43 per cent).

Recent work, led by multiple organisations, is pushing to change that.

Growers frequently raise the topic of compliance load and the ATGA has attended meetings, advocated for reduced complexity across compliance programs and conducted other work in parallel to that of multiple organisations.

So, what's happening in the compliance space?

RegTech project

A recent two-year initiative, delivered by Freshcare in partnership with Hort Innovation, which concluded in July 2025, has mapped certification programs across Australia and identified

opportunities to reduce duplication, streamline certification processes and standardise language across programs.

The project, *Developing a RegTech Framework and its applications across horticultural value chains*, explored how Regulatory Technology (RegTech) could reduce duplication in compliance requirements for horticultural growers. The project set out to better understand growers' compliance challenges and identify practical solutions that could streamline obligations across standards and regulations.

Funded by the Department of Agriculture, Fisheries and Forestry through its National Traceability Grants Program, the project gave insight into where duplication exists, where it doesn't exist and why it's hard to define. It provided growers with a stronger voice in shaping how compliance is managed through the development of a community of practice, and laid the groundwork for a more efficient, streamlined compliance system.

The project also proposed the development of a proof-of-concept "data cube", which would allow data based on a standardised language to be collected and used multiple times across different programs.

Freshcare's 2025 Standards Review

Freshcare's own 2025 Standards Review echoed these findings, with feedback from growers, auditors, technical experts and industry groups all pointing to the same issue: compliance has become overly complex, and the system needs clearer, more efficient pathways for businesses to follow.

AUSVEG's vegetable industry sentiment survey

AUSVEG's recent *Vegetable Industry Sentiment Report* reinforced this, showing most growers feel overwhelmed or burnt out by the rising compliance burden.

According to the report:

"Growers now face around 50 complex compliance requirements for vegetable production and on-farm packing, with over half of total compliance costs tied up in admin rather than actual regulatory or service expenses. The burden of compliance is heavier for smaller growers with on average 5.6% Earnings Before Interest, Taxes, Depreciation, and Amortisation (EBITDA) compared to larger growers at 3.2%." ❖

Read more about the RegTech project



Read the Vegetable Industry Sentiment Report





Driving market readiness across Asia

The Australian Table Grape Association (ATGA) has officially kicked off the 2025–26 international marketing program with the launch of its pre-season trade seminar and briefing series.

Phase 1 began with Vietnam and Indonesia – two priority markets that continue to offer strong growth potential for Australian table grapes. These early-season briefings engage importers, retailers and distributors ahead of harvest to strengthen commercial readiness and reinforce Australia's commitment to delivering consistent, premium-quality fruit.

Vietnam: Strong industry participation

The first leg of Phase 1 was held in Ho Chi Minh City at the New World Saigon Hotel, drawing over 40 attendees from major importers, leading retailers, and representatives from Australian state and federal government agencies. The session included an update on the 2025–26 season outlook, insights from ATGA CEO Jeff Scott, and a review of marketing activities from the previous season.

A targeted retail tour followed, with visits to Central Retail/Tops, Klever Fruit, Annam Gourmet, and MM Mega Market. These retailers continue to position Australian grapes as a premium offering, with strong shelf presence and clear consumer preference for high-quality red and green seedless varieties. Retailers emphasised opportunities to enhance visibility with refined point of sale and well-timed promotional activity.

Indonesia: High engagement

The second Phase 1 briefing took place in Jakarta at the Fairmont Jakarta, again attracting more than 40 attendees, including importers, modern-trade retailers, and representatives from Australian state and federal government offices. The strong turnout underscored Indonesia's growing importance as a market for Australian table grapes.

ATGA's Jakarta retail tour covered AEON, Grand Lucky, and Food Mart, providing insights into merchandising strategy, competitor placement, and premium imported fruit dynamics. Indonesian retail partners reaffirmed the value of dependable supply and strong brand consistency, noting that Australian grapes continue to perform well when supported by strategic in-store marketing activities.

Phase 2: Korea and Japan

With Phase 1 completed, ATGA has progressed to Phase 2 of the 2025–26 program, delivering pre-season briefings and retail tours in Seoul and Tokyo from 30 November to 5 December. Korea and Japan are mature, high-value markets with strong loyalty to Australian grapes, making early engagement especially important. These sessions focus on the season outlook, quality expectations, and the continued rollout of ATGA's refreshed five-year marketing strategy and the Australian Grapes brand.

Upcoming Thailand briefing

ATGA will expand the program early next year with a pre-season briefing and retail tour in Bangkok from 21–23 January 2026, concluding with a major trade event at the Sofitel Bangkok on 23 January. Thailand's rapidly developing premium retail sector makes it a key focus market for 2025–26. ❖

Jesse White

ATGA International marketing manager

Hort Innovation TABLE GRAPE FUND



Register your interest

The ATGA will host further promotional activities, both inbound and outbound, as part of the program. If you'd like to know more, reach out to Jesse or Terry today.

e: jwhite@atga.net.au

e: tmilner@atga.net.au



Anuga wraps 2025 dried grape marketing

The 2025 dried grape marketing calendar has wrapped up, finishing with the Anuga Food Fair in Cologne, Germany.

Dried Fruits Australia chair Mark King joined processor representatives at the event, which brought together 10 trade shows in one location.

Anuga allows exhibitors and trade visitors to experience the diversity of the food and beverage industry with products from around the world.

"This was a busy time with many potential buyers interested in Australia's dried grapes," Mark said.

"I understand that about 2600 tonnes were sold into the European market this year – the highest for many years.

"The quality was great and the taste of the Sunmuscats was impressive to those that tasted the samples.

"Australian dried fruit has a great name around the world and is known for its clean and green image."

Mark said the biggest issue he was confronted with at Anuga was Australia's lack of supply, especially coming off the back of a low 2023 crop intake due to impacts relating to weather and disease pressures.

"But trends are changing, with new plantings coming online, along with higher yields and new varieties that are less affected by disease and rain events," Mark said.

However, Mark explained it would be difficult to achieve great scale in the European market because China sells into this market at a very low price.

"At present, Dried Fruits Australia, along with the processors, are looking at other options. Korea has been in discussions, as has China's snack market," he said.

"The take home message is that the quality of the product from Türkiye and China has greatly improved and to look at the fruit it looks really good.

"Some of the processors have a number of colour sorters that give a very even sample. The taste is a different matter, but if it's going into the bakery market it doesn't appear to matter as much."

The Anuga trip followed an earlier marketing activity at SIAL Shanghai, China, in May and was part of the Dried Grape Strategic Export Marketing Three Year Plan (DG24501) funded by Hort Innovation using dried grape levies. ❖



Above: Dried Fruits Australia chair Mark King at the Anuga Food Fair in Cologne, Germany, in October.

Below: Samples of darker fruit coming out of China.



Hort Innovation **DRIED GRAPE FUND**



Responding to evolving markets

AUSTRALIAN PREMIUM DRIED FRUITS

Market update

Feedback from our agents in Germany at the Anuga Food Show was clear and consistent: the most significant barrier to selling our full export allocation this season has been the sharp rise in sultana prices.

The current pricing structure has reduced our competitiveness in key markets, particularly as buyers continue to show strong price sensitivity.

While Türkiye remains a major supplier to Europe, its dominant position is being challenged by both established origins such as South Africa, China, and Iran, as well as emerging suppliers including Uzbekistan, Afghanistan, and India.

As a result, buyers are diversifying sourcing strategies, and there is little value in benchmarking solely against traditional competitors like Türkiye and the USA when much of the market has already shifted to these lower-cost origins.

Fortunately, the domestic market was able to absorb the export volumes not placed internationally this season, supported by our relative competitiveness against imported products.

However, this is unlikely to be a reliable safety net in future seasons.

In addition, we appear to have reached saturation in the current bakery segment, which accounts for more than 90 per cent of our export sales.

Any future growth will require proactive diversification into new markets and product segments to mitigate stagnation, particularly as overall supply is expected to increase in the coming periods.

Equally important will be our continued focus on maintaining and improving product quality.

Feedback from buyers and agents indicates that quality expectations across key markets have risen significantly, and product specifications that were previously acceptable will no longer meet customer standards.

Consistency, appearance, and cleanliness are increasingly scrutinised, particularly as competition intensifies.

Sustained emphasis on quality assurance and product differentiation will be critical in preserving our reputation, securing repeat business, and supporting premium positioning in a more competitive and demanding global marketplace.

Operations update

Since our last update we've held a dehydration strategy meeting, which was open to all growers.

This was well attended with many great ideas put forth.

Following this meeting we've continued to meet with interested parties regarding the industry's future dehydration capacity.

Our initial discussions have been productive and at this point we hope to have at least two businesses willing to support the industry with added capacity.

The first season or two will be baby steps as we learn how best to streamline these services.

We recognise that dehydration costs are ever increasing and that this places a real burden on many growers.

Therefore, as a secondary phase to this strategy we must now encourage as many growers as possible to dehydrate their own fruit as this will be the cheapest option in the long term.

For those parties who are interested in an informal discussion to better

understand the costs of dehydration and setting up your own process, please contact Meg.

Integrated pest management (IPM) strategies should be in place for Queensland fruit fly.

This should include monitoring traps and targeted insecticides.

We would encourage growers to start planning and organising harvest equipment. ❖

Enquiries:
Grower communications officer
Meg Rogers | (03) 5025 6210
megan@apdf.com.au



Above: Anuga market: The APDF team at the Anuga Food Show.

Below: APDF dehydration: APDF hosted a dehydration strategy meeting to discuss the industry's future dehydration capacity.





Season starts with confidence

SUNBEAM FOODS & ANGAS PARK

Budburst and vine development are tracking up to 10 days behind the early 2025 crop.

Rainfall has been minimal, resulting in very low disease pressure, and overall growth is strong.

Bunch numbers appear healthy across most varieties, although Sultanas are showing some inconsistency in certain areas.

The newer, early-maturing varieties have again set a promising crop, reinforcing confidence in their performance.

The 2025 export marketing program delivered some of the highest-quality fruit to European buyers in many years, with significantly increased shipment volumes.

This reflects renewed confidence in both our productive capacity and quality delivered. However, competition is intensifying: Chinese fruit (priced lower) and South African fruit (with rising volumes) have this year surpassed Turkey's long-standing dominance as the benchmark for pricing.

Both countries are steadily improving quality and will remain influential in global markets.

To stay ahead, we must continue to enhance our product and maintain market leadership.

With the export program now complete, Sunbeam enters the 2026 harvest with a small carry-over of fruit to meet retail and industrial customer requirements – consistent with our usual practice.

Prunes

The flowering period has been successful and delivered an above average crop load that required some thinning to manage fruit numbers.

The crop is shaping up well and although it is slightly behind 2025 in development timing, it is showing good progress.

Prune grading 2026

After over 50 years of grading Angas Park growers' prunes, Yenda Producers Co-operative (YPC) has relinquished the grading agreement as of this year.

We recognise that this arrangement has been beneficial to Angas Park, growers and to YPC, but now the opportunity has arisen for Angas Park to extend management of the procurement to the transport, storage to grading of the prune crops as well.

This change will see an improved service around bin deliveries and fruit collection from grower properties, more timely grading and communications.

Our target is to make this transition as smooth as possible, with positive effects on growers and drying contractors.

Angas Park 2025 Prune Growers Quality Awards

The 11th Annual Prune Grower Quality Awards were a true showcase of excellence!

This year's competition was fiercely contested, with grading results setting an incredibly high standard.

These awards celebrate the best in graded sizes, grading and processing efficiency, recognising growers who delivered outstanding quality.

The 2025 winners are:

- D & G Zalunardo
- P & L Cremasco (Paeco Pty Ltd)
- J & A Cremasco

Each of these growers has now earned multiple wins, which is a testament to their dedication and skill. Congratulations on raising the bar yet again!

Dried tree fruits

The fruit trees experienced a prolonged flowering season that has set a good crop on the new varieties and a reasonable crop on older trees.

The winter chill factor accumulation was slow to start with very mild early winter conditions, the chill units increased later in the period but were less than ideal.

The weather conditions since have been good and the fruit is sizing ready for what we hope is a hassle-free harvest.

Our Angas Park – Pike River Orchard hosted the Australian Dried Tree Fruits Field Walk as part of the AGM and Grower Forum in early November.

It was a pleasure to show growers and industry stakeholders the development of the orchard and progression from the older varieties to the new improved varieties.

The industry is relatively small, but the strength is in the collaboration between the growers and the joint goal for industry success.

The overall production is increasing, which gives a fantastic opportunity to have a greater Australian offering to consumers. ❖

Enquiries:

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David Swain | 0407 834 044

Field Officer - Dried Vine Fruit
Gary Simpson | 0429 960 234

Dried Tree Fruits Operations
Manager – Loxton
Luke Fitzsimmons | 0431 894 515





Profile: The Sultana Sisters

KATERINA IVERSON-BLEKIC AND IVANA BLEKIC

The *Vine* last spoke with Katerina and Ivana in 2020, just a couple of years into launching their brand, The Sultana Sisters.

Here we catch up with the third-generation dried grape producers to find out how things have changed for them in the past five years, how they're giving back to their communities, and their plans for the future.

What has changed for you and your family operation since the *Vine* spoke to you last (pre-Covid)?

Since the *Vine* last spoke to us, life has changed in all the best possible ways. We've both entered new chapters personally and professionally, and while our 9 to 5s look different these days, our connection to the vineyard remains strong.

Katerina got married, moved cities twice

for her husband's work, and continued building her career in economic development and project management.

She also spent 2023 travelling across Australia and overseas in her role on the Lions Clubs International Board as a Leo-Lion Board Liaison and completed her MBA in Innovation and Leadership.

Ivana has remained in Mildura and commutes for work as a lawyer, balancing her career while staying closely connected to the vineyard and our family, in addition to her volunteer role as Deputy Legal Officer with Lions Australia.

Even with distance and the demands of adult life, our involvement has become more intentional.

We appreciate our family history more deeply, and we've stepped into more responsibility as the next generation contributing to a multi-generational vineyard, still proudly supported by our brother, parents and grandparents.

What does the vineyard and business operation look like for you at the moment?

Right now, the vineyard remains a family-run operation.

Our parents continue to manage the day-to-day work, and our grandparents are still involved as well, something we are incredibly proud of.

Their knowledge, experience, and connection to the land form the backbone of everything.

We contribute to the background wherever we can around work and distance, returning for harvest, etc. While we may not be as hands-on as we were growing up, our commitment hasn't changed.

Eventually, Katerina and her husband plan to move back, further strengthening the long-term future of the operation.



We understand you have donated some of your product to Foodbank SA. How did that come to be, and why did you choose to do that?

Our donation to Foodbank SA came from a very natural place.

Both of us volunteer in different ways outside the vineyard, and food security is something we feel personally connected to. One year, we had some spare fruit available and being passionate about supporting our community, we reached out to Foodbank SA.

They welcomed it with open arms, and it's become something we're proud to continue over the past few years.

Being able to give back through the very product our family has grown for generations feels incredibly meaningful.

This year, we were especially grateful for the support of Australian Premium Dried Fruits, who generously assisted with cleaning the fruit to make the donation possible.

Their help ensured the fruit could be used to support those in need, and we want to extend a special thank you for their contribution and willingness to support our initiative.

Foodbank SA plays a vital role in supporting community members experiencing hardship, and it's

a privilege to assist their work. Their ongoing impact inspires us, and we're honoured to contribute to such an important cause.

What plans do you have for the future in the industry – both with The Sultana Sisters and more broadly?

We're in the early stages of creating children's books centred around agriculture, dried fruit, and understanding where food comes from.

You rarely see dried grapes industry in children's books or women represented in agriculture and we want to change that.

Our inspiration comes from our upbringing and our desire to share the story of the vineyard, the industry, the women, and the generations who are part of it. Our goal is to create something fun, educational, and empowering for young readers.

More broadly, we hope to continue advocating for the dried grape industry and showcasing the role of the next generation. Whether through storytelling, advocacy, community work, or helping keep our family vineyard sustainable, we're committed to contributing in ways that align with our evolving lives.

What do you like about the dried grape industry?

We love the sense of community. We were born and raised in the dried grape industry, and it is built on generational knowledge, hard work, resilience, and pride.

There is something truly special about being part of a crop that is sun-grown, traditional, and deeply connected to the identity of Sunraysia, or Tropical North Victoria.

Every season teaches you something new. And every grower, no matter the size of their vineyard, has a story worth telling.

What do you see for the future of the industry? Challenges and opportunities?

There are certainly challenges, labour shortages, climate pressures, rising operational costs, and financial strain across many family vineyards. But there are also strong opportunities.

Consumer interest in Australian-grown produce continues to rise, along with a desire for transparency around food origin. There is growing demand for natural, additive-free snacks, which positions dried grapes beautifully.

There is also a significant opportunity in storytelling, connecting consumers to the people behind their food. That emotional connection will play a powerful role in the future of the industry. ❖



Notice board

Right: Mallee Horticulture Technical Network, which includes ATGA and DFA, hosted an integrated pest management event with pest management specialist David Haviland, who was visiting from California.

This event, open to growers and technical service providers, was held by Dried Fruits Australia, the Australian Table Grape Association, Murray Valley Winegrowers Incorporated and Agriculture Victoria, and supported by Hort Innovation using the table and dried grape levies.



Below: Table grape growers in the Mildura and Robinvale / Euston regions attended two successful sessions with David Haviland on managing mealybug. During the sessions, David provided insights from his 20-years' developing integrated pest management programs for Californian growers.



Jeremey Boyd (Chair) Victoria

Rocky Mammone (Deputy Chair) Victoria

Dominic Sergi Victoria

Robert Nugan Victoria

Joe Garreffa New South Wales

Anthony Cirillo New South Wales

Bill Avery South Australia

Kyle Lovreta Western Australia

Mark Zappia Victoria

Robert Albanese Victoria

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Dried Fruits Australia hosted a field walk at Stephen and Malcolm Bennett's Merbein property, where growers got a glimpse of how the cordon copes with mechanical pruning using a lidar-guided system.

Top to bottom:

1. Ivan Shaw was among the crowd.
2. Grower John Hunt discusses the use of the mechanical pruning system.
3. Stephen Bennett opened his Merbein property to showcase mechanical pruning.
4. DFA industry development officer Michael Treeby.
5. The crowd at the DFA field walk.

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Mark King (Chair) Producer, Pomona

Warren Lloyd (Deputy Chair) Producer, Irymple

Stephen Bennett Producer, Merbein

Ashley Chabrel Producer, Barmera

Matt Williams Producer, Red Cliffs

Rowena Smart Producer, Red Cliffs

David Swain Sunbeam Foods

Craig Greenwood Australian Premium Dried Fruits

Michael Scalzo Australian Premium Dried Fruits

Nathan Walker Producer, Duxton

Nathan Jilbert Specialist, Cardross

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