



**Australian Government**  
**Rural Industries Research and  
Development Corporation**

# Australian Truffle Industry R&D Strategic Plan 2009–2011



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**Rural Industries Research and  
Development Corporation**

# **Australian Truffle Industry R&D Strategic Plan 2009–2011**

July 2009

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*Truffle Industry: R&D Strategic Plan 2009–2011*  
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RIRDC acknowledges the work of Adrian Best in facilitating the strategic planning workshop and in bringing this publication together.

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# Foreword

The Australian truffle industry is focusing on truffieres for cultivation of *Tuber melanosporum* (French Black truffle). The industry is united in its goal to bring the unique truffle flavour experience to all consumers, both domestically and internationally and in doing so create many profitable enterprises in regional areas of Australia.

The Australian truffle industry is assisted by the RIRDC New Plant Products program. The industry has achieved significant growth in Tasmania, Victoria, Western Australia and New South Wales and is looking to achieve further expansion over the next three to five years as truffle plantations mature and production increases.

In 2007, RIRDC commissioned Mr Barry Lee to provide a snapshot of the Australian truffle industry to help inform its future development. The resulting report, *Taking Stock of the Australian truffle industry* (RIRDC publication 08/124) has provided the catalyst for the industry to meet and map out its future development.

This priorities and strategies report builds on the outcomes of a key stakeholder meeting conducted in August 2008, and an industry planning day in September 2008, engaging a wide range of industry stakeholders.

A wide range of topics was addressed at the planning day. Agreed outcomes included support for the development and ratification of an industry peak body, and development of a cohesive set of priorities for action by the industry over the next three years to address production constraints affecting the markets for Australian truffles.

This report has been circulated to all participants from that planning day for comment and will be further refined following consultation with key stakeholders from the broader industry. The report identifies key objectives for investment and areas for future consideration, detailing the strategic research and development needs (agreed upon at the planning day) that the industry seeks to pursue in partnership with RIRDC.

The production of this report was funded by RIRDC core funds, which are provided by the Australian Government.

This R&D Strategic Plan, an addition to RIRDC's diverse range of over 1800 publications, forms part of the New Plant Products Research and Development Program, which aims to facilitate the development of new industries, based on plants or plant products that have commercial potential for Australia.

Most of RIRDC's publications are available for viewing, downloading or purchasing online at [www.rirdc.gov.au](http://www.rirdc.gov.au). Purchases can also be made by phoning 1300 634 313.

**Peter O'Brien**  
Managing Director  
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# Introduction

The Australian truffle industry seeks to be recognised as world class in its production, processing and supply of high quality truffles to a discerning domestic and international market.

The industry is working towards consolidation, aiming to ensure stakeholders are informed on new industry developments and working together to engage whole of industry, R&D researchers and providers of new technology to develop and maintain quality truffle production.

The Truffle Growers Association is providing a platform for consumer information, education and industry communication.

The industry's key objectives were identified and prioritised in a workshop sponsored by the RIRDC. A spreadsheet containing these priorities forms *Attachment A* of this report.

Key stakeholders agree that working together as an industry will:

- provide a profitable and sustainable Australian industry serving this growing market
- build consumer recognition and appreciation of the Australian truffle Industry
- achieve a global reputation for reliable supply of safe and consistently high quality truffles
- solve production and supply chain problems that threaten reliability
- recognise that the contributions of all key stakeholders will provide value through their involvement in the industry.

## Background on the preparation of the strategy

This is the first industry-supported *Research and Development Strategic Plan* for Australia's truffle industry. It was developed through a workshop with truffle industry representatives in Melbourne on 1 September, 2008. The workshop was facilitated by Adrian Best, senior consultant for Stirling Castle Pty Ltd, acting as principal researcher on behalf of the truffle industry. This strategic planning meeting in September 2008, built on information developed through the Association's 2008 AGM and RIRDC publication 08/124 'Taking Stock of the Australian Truffle Industry' produced by Barry Lee.

This current document is produced with a focus on the areas that are of greatest potential value to Australia's truffle industry and where there are capabilities to provide high value to the whole of the industry.

The workshop discussed:

- challenges and priorities facing the industry
- consumer education and market analysis required for whole of industry investment to improve the relevance, uptake and impact of R&D
- the main factors limiting the growth and success of the industry and the opportunities emerging for the industry

- the role that R&D could play in addressing constraints and engaging with opportunities
- priorities for R&D where there is common interest across industry members
- strategies for raising the quality and quantity of R&D to support industry development.

This plan highlights priorities and actions, with agreement by the key stakeholders attending the workshop, to support and work towards achieving outcomes on behalf of industry. The draft report has been distributed to the truffle Industry's key stakeholders, workshop participants and interested parties for comment and input, and their responses have been incorporated into this document.

The Association recognises the important role that RIRDC support plays in promoting and developing the Australian truffle industry. In recognition of the major task of establishing a clear, unified industry that can take Australian truffles to the world, the Association intends to apply for further funding from RIRDC. The Association is supported by the Australian truffle industry and other key stakeholders and is developing strategic plans to progress the objectives of industry members, to build a competitive and sustainable rural industry.

The vision and mission for this R&D Strategic Plan align with the aims and objectives of RIRDC, the Australian Government.

## **Vision**

- The Australian Truffle Growers Association Inc becomes a truly representative association embraced by all stakeholders within the Australian truffle industry.
- It will be a cohesive association that will reach out to prospective members/stakeholders, and will develop and maintain a strong network of industry participants.
- It will be a force for education of members and industry stakeholders, market research, promotion of the industry and education of consumers of Australian truffles.

## **Mission**

To create and sustain an authentic Australian truffle flavour experience for consumers by:

- building consumer education in the recognition and appreciation of the Australian truffle industry
- adopting a whole of industry approach to a profitable and sustainable Australian truffle industry serving this growing market
- achieving a global reputation for reliable supply of consistently high quality and safe truffles
- solving production problems that threaten reliability
- adopting strategies to build resilience into agricultural systems
- improving awareness and communication to inform decision-making by primary producers and rural communities by developing a best practice guide for the production of truffles in Australia
- creating an innovative culture
- protecting Australia from invasive diseases and pests that might threaten the industry.

## Objectives

An indicative allocation of resources is given in brackets:

- Establishing an action group to work with AQIS on Import Legislation for Chinese or other identified truffle varieties (10%)
- Understanding, strengthening and developing market analysis and market drivers (20%)
- Establishing a grading standard truffles (10%)
- Research into diseases with a focus on affects of rot on truffles (30%)
- Consumer education, industry communication and engagement, and advancement of accreditation standards (30%).

## Alignment with Government and RIRDC priorities

The truffle industry priorities and strategies align well with the Federal Government's National Research Priorities and Rural Research Priorities and with RIRDC's corporate objectives.<sup>1</sup>

## Contribution to RIRDC outcome areas

RIRDC has an overarching goal of maximising the return across the triple bottom line of its investments. It has five main outcome areas as set out in the *Primary Industries and Energy Research and Development Act 1989* (the PIERD Act) and as directed in the government research priorities. The truffle industry is in RIRDC's New Rural Industries portfolio, which has the objective: ***to facilitate a more profitable, dynamic and sustainable rural sector.***

## National research priorities

The national research priorities are set out below:

- An environmentally sustainable Australia
- Sustainable natural resource management
- Frontier technologies for building and transforming Australian industries
- Improved competitiveness through a whole of industry approach
- Safeguarding Australia
- Improved trade and market access
- Creating an innovative culture.

The Truffle Industry R&D Strategic Plan makes contributions across all of these priorities. Safeguarding Australia is one of the high priorities for the truffle industry and is discussed below.

It also offers opportunities for creating an innovative culture for improving competitiveness through a whole of industry approach. Perhaps, most importantly for the industry, the focus is on raising the profile of the industry and educating current and potential consumers.

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<sup>1</sup> See RIRDC, Corporate Plan on [www.rircd.gov.au](http://www.rircd.gov.au)

## **Rural research priorities**

Priorities raised in this document align with one or more of the rural research priorities set out below.

### ***Productivity and adding value***

*Improving the productivity and profitability of existing industries and support the development of viable new industries.*

The strategy addresses production constraints to improve productivity of existing growers and to help new growers enter the market.

### ***Supply chain and markets***

*To better understand and respond to international and domestic market and consumer requirements and improve the flow of such information through the whole supply chain, including to consumers.*

Building Value Chains for the truffle industry is a critical step in gaining market access. The process required depends on sound knowledge of the nature of the product, of suitable packaging and the target market, whether international or domestic. Particularly important for the truffle industry is consumer education and building the knowledge of the industry and ability of the consumer to have confidence in the reliability of quality and supply of Australian truffles. Generally the Industry recognises that the Australian Truffle Growers Association can play a significant part in this, particularly in regard to the international market. The product is high value and is an international product worthy of receiving an international price.

### ***Natural resource management***

*Support effective management of Australia's natural resources to ensure primary industries are both economically and environmentally sustainable.*

The truffle industry provides excellent opportunities to encourage the protection and expansion of tree plantations with all of the environmental benefits that this brings.

### ***Biosecurity***

*Protect Australia's community, primary industries and environment from biosecurity threats.*

The industry is rightly focused on maintaining and promoting the use of high quality truffle species within Australia. The risk to the industry from introduced Chinese truffles or other fungus varieties is extremely high. The Truffle Growers Association is proposing to work with AQIS to help contain any damage from importation of truffle varieties that may cause a threat to the Australian industry.

### ***Supporting the rural research and development priorities***

*Improve skills within the industry to undertake research and apply its findings and promote the development of new and existing technologies.*

The industry recognises that considerable R&D is required to support the development of the industry. Identified research needs include research into mycology, pests and diseases, certification and quality assurance in infection of trees. Inconsistencies in these areas have been a challenge to the industry. The R&D strategies presented recognise the

need to involve producers in the R&D process to ensure rapid adoption as well as the efficient use of scarce resources.

## **Industry representation**

The establishment of the truffle industry Growers Association has been instrumental in consolidating industry strategic plans for the future development of the industry and it welcomes members from any part of the industry value chain.

The Association's objectives are:

- To act as a body representative of the truffle industry and in particular provide a channel for:
  - communication and representation at political levels, and for consumers in relation to the future direction of the industry
  - liaison with international industry organisations in relation to the industry
  - any necessary public relations in support of the industry
  - coordination of research, market development and product development projects for the industry, particularly on a national basis
- To provide leadership and direction in relation to the maintenance, improvement and development of the standards of the industry, related to industry processes, produce and products
- To act as a consulting and advisory body among its members
- To foster a closer association between persons engaged in, connected with, serviced by or interested in the industry
- To establish and promote activities of value to members
- To engage in other activities in support of the above objectives.

## **Research and development priorities from the workshop**

The Truffle Industry R&D Strategic Plan focuses on whole-of-industry-based projects being currently supported from RIRDC's New Plant Products program. The priorities set during the September 2008 workshop were:

### ***Highest priority***

- A committee has been agreed to assist AQIS in working with bio-security issues. This committee will review legislation, penalties and provide technical expertise to work with AQIS in examining the legislation to control the import of truffles and inoculants into Australia that are considered to be detrimental to the industry.
- Understanding, strengthening and developing market analysis and market drivers.
- Establishing a grading standard
- Research into diseases with a focus on affects of rot in truffles
- Consumer education, accreditation standards and international industry representation regarding quality and the promotion of Australian truffles.

### ***High priority***

- Improving economic viability of truffle growing & independent technical skills
- Protocol and guide for packaging
- Transportation requirements

### ***Medium priority***

- Dog training
- Calender of events
- New product development

In conducting both the AGM and the Strategic Planning workshop, the Association found that the industry was willing to support R&D, but it has had disappointing penetration and limited impact to date. Greater effort in engaging industry members in the R&D activities was seen as an essential part of ensuring more applicable R&D outputs and promoting adoption.

The Association will seek assistance to investigate and research the high priority items on behalf of the industry.

At the time of writing, there were five high priority projects that were proposed. The industry is still in its formative stages and as such contribution to RIRDC has mainly been through participation. The industry does not have a voluntary or compulsory levy in place at this time but is looking at options to increase the levels of funding available for R&D.

The Association is seeking to provide support (mainly in-kind) to match RIRDC funding. To achieve this, key stakeholders in the industry have taken ownership of potential projects that represent a high priority for them.

## Other areas of importance

There are a number of other areas where R&D may be of benefit to the industry. The areas that are seen as important, but more likely to be addressed elsewhere, are as follows:

- A 'best practice guide' is of major importance to the industry producers, particularly the small holders, to ensure quality throughout the value chain, to enhance industry integrity and potentially form a basis for the development of a national quality brand that will ensure the reputation the industry both domestically and internationally.
- A major issue facing the truffle industry is the availability and sustainability of well trained truffle dogs, (and ready access to this resource during the harvesting season).
- There is also a need for research:
  - to examine the varietal diversity of truffles used in Australia
  - to carry out research into the process of infecting trees
  - on the choice of trees used in truffieres in Australia.

Value adding will be an important component in the development of the truffle industry. While it is not outside the scope of RIRDC to support processing R&D, the requirement for sharing the R&D findings, post-harvest value adding was seen as a lower priority, as resources are limited, and this is the point in the supply chain where producers are best able to differentiate their product and hence have an incentive to invest in R&D on their own account.

# Three Year Industry Priorities and Strategies

## Objectives

An indicative allocation of resources is given in brackets:

- Establishing an action group to work with AQIS on Import Legislation covering truffle (Chinese or other identified varieties) (10%)
- Understanding, strengthening and developing market analysis and market drivers (20%)
- Establishing a grading standard (10%)
- Research into diseases with a focus on affects of rot in truffles (30%)
- Consumer education, industry communication and engagement, and advancement of accreditation standards (30%)

### **Objective 1. Establish an action group to work with AQIS on Import Legislation covering Chinese or other identified truffle varieties**

#### ***Background***

There is strong industry commitment to the attainment of this objective to ensure the biosecurity of existing and future truffiere development in Australia. As well as threats to production there is also the significant risk of fraudulent practice in truffle sale substitution, potentially damaging the reputation of Australian truffle quality.

#### ***Strategies***

The Association has agreed to form a committee to assist AQIS in working with bio-security issues to protect the industry. This committee will provide technical expertise and will work with AQIS regarding the control of the import of truffles and inoculants into Australia.

### **Objective 2. Understanding, strengthening and developing market analysis and market drivers for Australian truffles**

#### ***Background***

The Australian truffle industry faces a number of hurdles in being accepted and understood in the food service and consumer markets in Australia. The industry is developing products that have traditionally been imported (and then, by very few Australians) and there is confusion as to the capacity of the industry, availability, consistency and preparation/use of the product

As a first step, the Association is establishing a Reference Group to review and build the infrastructure for building knowledge and understanding about the industry. The Industry feels that this is a significant area for development to ensure that the Australian truffle industry is successful.

Common descriptors that the industry members can draw on to describe their types of truffle products would assist in developing market awareness and in reducing the confusion that can surround the quality and standard of those truffles produced in Australia and those truffle products that might be imported from overseas.

This will ensure that consumers, in particular the food industry consumers, get consistent and known quality, essential in building the market for Australian grown produce.

There are also a number of education needs to support the emerging industry by providing information on textures, flavours and the use of truffles as a modern cuisine ingredient. There are also R&D needs to support the industry in identifying existing varieties of truffles being grown in Australia.

### **Strategies**

The following strategies would be applied to products, based on the gaps in the knowledge base.

- Develop a standard set of information for truffles that includes:
  - post-harvest handling and storage information and its links to quality
  - uses of truffles and information on their potential in the food service markets
  - availability and general truffle knowledge for consumers and retailers.

This information would be made available to the industry and potential entrants as well as consumers. It could be used as the basis for improving grading standards for truffles to build local industry competitiveness and match or exceed the quality and consistency of overseas producers.

- Develop knowledge by the industry and consumers in truffle use and handling characteristics
- Develop workshops, supported by the industry, for food service and other key industry stakeholders on a regional basis.

### **Targets and indicators**

The measure of achievement will be the extent to which the Australian consumers and foodservice industry understand the truffle industry in Australia and the uptake in the use of truffles by consumers and the food service industry.

Progress will depend on funding and industry enthusiasm and participation. The indicator would be the publication of information on truffle production and preparation in the media. This information would be made available on the Association website.

### **Objective 3. Establishing a grading standard for Australian truffles**

#### ***Background***

The truffle industry is facing a considerable learning curve in regards to informing producers of the best quality attributes for the crop. Growers are engaged in assessing what is and what is not “A grade” quality. There is considerable potential to improve overall industry standards and increase value to all producers through sharing this knowledge. Improving the consistency and quality of supply is important in developing the market.

While it is recognised that it will usually be individuals who take specific products forward through the commercialisation process, the potential for under-prepared farmers/suppliers to damage the market makes it a priority for industry to facilitate the processes involved in quality identification and maintenance.

It is also important that the quality standards match those of the European producers so that international markets can readily identify matching quality from Australian truffle suppliers.

#### ***Strategies***

- Encourage the Industry to agree on types of quality information between growers. The R&D component is to support the development of a methodology and template for establishing a grading system and to communicate that to growers, food service industry and consumers.
- Enable a group, including committed growers, to work together on guidelines for a common grading system.

#### ***Targets and indicators***

A target for this strategy would be compilation of the grading standard for the truffle industry. The indicator would be the publication and industry-wide distribution of the information once produced.

### **Objective 4. Research into diseases with a focus on affects of rot in truffles**

#### ***Background***

Rot in truffle production is one of the most severe problems facing the industry. This can reduce production yields by as much as 20%. Resolving this problem has the potential to add considerably to the size and value of the market for the crop.

#### ***Strategies***

- The industry is committed to working with a research organisation to develop methods of reducing or stopping the effects of rot in truffles.
- A steering committee will be formed to project manage the outcomes on behalf of industry.

### ***Targets and indicators***

A target is that over the next three years a research program involving a research organisation will work with industry to deliver an outcome of reducing the affects of rot on truffle industry production.

## **Objective 5. Consumer education, industry communication and engagement, and advancement of accreditation standards for Australian truffles**

### **5.1 Improving industry involvement**

The industry has made considerable progress in developing an industry profile and presence with the formation of the Truffle Growers Association. It aims to continue the momentum, and apply for support to develop an industry approach to consumer education in support of the Australian truffle industry. Prior to the establishment of the Australian Truffle Growers Association, the industry was fragmented and lacked an effective peak body to speak for it and to attend to matters of common interest and concern such as industry promotion, strategic planning, representation to governments and R&D.

Even now, following more than 2 years since the establishment of the Association, some significant producers still have not fully engaged with the Association. As long as this situation remains, hard facts on the value and composition of the industry will be difficult to obtain, and quality assurance and product descriptions for marketing will remain unresolved, resulting in confusion for consumers/markets, and causing industry development to flounder.

The engagement of these producers is seen as a high priority so that the industry can **move forward in a way that benefits everyone.**

#### ***Strategy:***

- The Association will seek RIRDC's help to bring all key industry participants together to, as a first step, discuss matters of mutual interest.

### **5.2 Continue successful AGM strategy**

Through its AGM and associated annual workshop and information day, the Association creates an opportunity for interested industry participants to come together to discuss scientific and policy issues surrounding the successful production of truffles and the development of the industry. This event has been taken around the major truffle growing areas to benefit both growers and consumers and increase the general awareness of the public to the industry and its product.

#### ***Strategies:***

- To this end the Association will hold it's AGM in various states and growing regions, thereby creating awareness in the area and introducing growers to the diversity of areas planted in Australia.

- The Executive Committee will be appointed on the basis of State representation and will contribute to the management of the AGM, information days and the festivals to achieve maximum impact for the benefit of the industry.

### **5.3 Other promotional events**

From time to time, the Association carries out promotional activities that inform both consumers and prospective industry participants about the industry. These activities can be linked, for example, to activities at harvest time or at other historically “culturally significant” times for truffle-growers.

#### **Strategy:**

- Where opportunities arise, the Association will be involved, and encourage others to be involved, in promotional activities that will raise awareness of the industry. The Association has adopted the Winter Solstice as the signature date for truffle festivals, to be held on a regional basis in the truffle growing areas of Australia. The first of these festivals is to be held in Canberra in June, 2009.

### **5.4 Engaging the food service industry**

One element of industry development, important for domestic market access, as well as broader industry exports, is the relationships between the industry and the food service industry. This is seen as critical for meeting customer requirements and increasing the consumption of truffle products for the industry.

#### **Strategy:**

- A steering committee will be formed to investigate more direct methods of creating an impact in the food industry associations, apprentice chefs and the food industry generally.

### **5.5 Association website**

The Association keeps in touch through its interactive members’ bulletin that is based around the Association’s website.

#### **Strategy:**

- The Association will continue to maintain and develop its website as an unrestricted information and communication hub for members, industry stakeholders and other interested parties.

### **5.6 Advancement of standards/accreditation**

For some time there has been concern that markets are being confused by inconsistent standards and product descriptors used across the industry. Progressing towards uniform standards in the immediate future is important.

#### **Strategy:**

- The Association will seek RIRDC’s assistance to advance an appreciation within the broader industry of the need for uniform standards.
- The association will seek to progress development of those standards.

### ***Targets and indicators***

- Outlying major industry groups will be engaged through meetings with the Association and RIRDC.
- The AGM will continue to move around Australia
- Over the next three years at least two Festivals will be presented across Australia with the prospect of additional Festivals being formed in producing areas.
- A program to carry out R&D on information required by the food industry to increase the awareness and understanding of truffles and their use, developed and on place.
- Popularity/usage of website increased.
- The development of standards is being planned and progressed.

### **Truffle industry strategy budget**

The truffle industry will seek assistance for funding the implementation of this strategic plan. Around \$400,000 of funding would be required to put the proposal into action.

Industry is expected to increase its in-kind contributions until it can provide a method of meeting cash contributions.

The Australian truffle industry and the Association in consultation with RIRDC will review performance in relation to the priorities and strategies annually.

## Appendix 1 – Outcomes of planning meeting

Priority	Objective	Goals – Short term 1- 2 years)	Goals – Long Term (3–5 years)	Approx Costs	Team
1	Import Legislation for truffle (Chinese or other identified varieties)	Committee to work with Bio-security and AQIS, 1. Review legislation, Penalties, Funding for group to assist. 2 Identification of technical expertise AQIS resources Logistics, Import or certification paperwork. 3. Communications plan and strategy 4. Single point of entry located where resources are – Mel/ Syd			Tim Terry, Nick Malajczuk Noel Fitzpatrick
1	Market analysis and research on Price trend fluctuations	International competition Market drivers – gather base data research	1. Strategy development 2. Export plan	\$80,000 \$40,000 \$30,000	Frank Cassells, Noel Fitzpatrick, Adam Wilson
1	Grading	Standard (broader based Document. Grading Guide		>\$10,000	Al Blakers, Damon Boorman, Wayne Haslam
1	Research	in Pests and diseases with a focus on affects of Rot on Truffles using mycology through either Murdoch or Servag		\$30,000 per year over 3 years	Alf, Tim, Peter Cooper,
1	Industry Association responsibility	Consumer Education Standards and Accreditation International Representation for the Australian Industry – Travel? Organisation restructure Resourcing of activities Government Liaison Base fee and membership fee for services		\$50,000	Wayne Haslam, Alf,
2	Improving economic viability of Truffle growing Independent Technical Skills	1. Produce a business skills best practice guide to get growers to the first level. Truffle Growers Guide Commercial Nursery accreditation		\$50,000 and \$ 25,000 delivery (work-shops) \$10,000	Identify a student broader based skill set on Truffles and mycology as projects. Roy Priest Barry Lee Wayne Haslam
2	Protocol and guide for packaging and Transport for fresh truffles			\$10,000	Damon Boorman, Al Blakers, Peter Cooper
3	Dog training	Training dog guide, Dog trials, dog field days and industry education days		\$10,000	Wayne Haslam information on Website
3	Calender of Events	State and regional support for developing a industry Calender		\$10,000	
3	New product development	R& D grants for truffle presentation to extend the Truffle season Shelf life and product development High pressure and other technologies		\$100,000	



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The Australian truffle industry is assisted by the RIRDC New Plant Products Program. The industry has achieved significant growth in Tasmania, Victoria, Western Australia and New South Wales and is looking to achieve further expansion over the next three to five years as truffle plantations mature and production increases.

This R&D Strategic Plan, an addition to RIRDC's diverse range of over 1800 publications, forms part of the New Plant Products Research and Development Program, which aims to facilitate the development of new industries, based on plants or plant products that have commercial potential for Australia.

RIRDC manages and funds priority research and translates results into practical outcomes for industry. Our business is about new products and services and better ways of producing them. Most of the information we produce can be downloaded for free from our website: [www.rirdc.gov.au](http://www.rirdc.gov.au).

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