



Australian Government

Rural Industries Research and
Development Corporation



RURAL INDUSTRIES
Research & Development Corporation

Ginger Industry R&D Priorities and Strategies: 2012 to 2017



AUGUST 2013

RIRDC Publication No. 12/133

VISION

Enhanced prosperity for Australian rural industries and their communities

PURPOSE

To invest in research and development that is adopted and assists rural industries to be productive, profitable and sustainable

GOALS

Promote leadership and innovation
in the rural sector

Increase profit and productivity
in rural industries

Enhance sustainability
across the rural sector

STRATEGIES

Deliver analysis on issues of national importance to the rural sector and broader community

Assess the feasibility, value and potential competitiveness of new plant and animal industry opportunities

Encourage research that fosters science and industry creativity

Manage demand driven RD&E that meets industry needs

Facilitate investments that deliver economic social and environmental benefits for rural industries

Adopt a life-cycle approach to investment in new, developing and established industries

Work collaboratively on cross sector issues that impact across industries

Increase knowledge about rural industry options that offer regional economic development opportunities

Encourage the sustainable use and management of natural resources

Promote leadership, capacity, skills and pathways that create opportunities

OUTCOME

Increased knowledge that fosters sustainable, productive new and existing rural industries and furthers understanding of national rural issues through research and development in government-industry partnership.



Australian Government

**Rural Industries Research and
Development Corporation**

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August 2013

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Foreword

In 2010, the Ginger Industry was successful in raising an R&D levy to help fund much-needed R&D, largely to meet the challenges of critical disease issues threatening the industry's viability.

A subsequent, strongly supported vote, saw the statutory R&D levy introduced in April 2011. Since that time, the Ginger Industry R&D Program has developed as a cohesive set of projects managed through RIRDC.

The first year of the program produced eight projects that are already having a significant positive impact on the industry.

RIRDC is committed to the development of Five Year R&D Priorities and Strategies for each of its Research and Development Programs in keeping with the Corporation's Five Year Corporate Plan, and the National and Rural Research Priorities.

This report outlines the R&D priorities and strategies over the next five years for the Ginger Industry. It builds on the outcomes of a series of stakeholder meetings conducted over the past three years where R&D priorities were sought, honed and prioritised by the industry's stakeholders.

The report identifies key objectives for investment and areas for future consideration, detailing the agreed strategic research and development needs that RIRDC will pursue in partnership with industry. It focuses on priorities and on strategies that will strengthen industry engagement with R&D and best assist the industry to build and develop its future.

This report is an addition to RIRDC's diverse range of over 2000 research publications and it forms part of our Ginger Industry R&D program, which aims to facilitate the development of the ginger industry in Australia.

Most of RIRDC's publications are available for viewing, free downloading or purchasing online at www.rirc.gov.au. Purchases can also be made by phoning 1300 634 313.

Craig Burns
Managing Director
Rural Industries Research and Development Corporation

Snapshot of the Five Year R&D Priorities and Strategies

Vision

A sustainable, growing and prosperous ginger industry supplying product of the highest quality that is strongly sought-after by discerning consumers in Australia and around the world.

Mission

To provide research and development in support of the industry's three strategic priorities, so as to lay the platform on which the Australian Ginger industry will grow and prosper. The industry's three agreed strategic priorities are:

- To assure industry competitiveness
- To build stronger linkages with customers and the market
- To steer the industry's future direction.

Objectives

The research and development objectives in support of this mission are as follows:

- To solve disease and production problems that threaten reliability and quality of the industry's produce.
- To develop and support integrated pest management strategies that protect the industry from pests and diseases.
- To provide solid scientific advice to secure the biosecurity of the industry in Australia.
- To understand the market opportunities and drivers that can propel the industry's economic success in Australia and abroad.
- To build industry relationships and improve communication of R&D opportunities and impacts.

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Introduction

This is the first Five Year R&D Priorities and Strategies document for the Australian Ginger industry. The industry voted to pursue an R&D levy in 2010. In April 2011, the Federal Minister for Agriculture, Fisheries and Forestry approved the introduction of a statutory R&D levy for the industry.

Derivation of R&D strategies and priorities

In 2011, the industry developed a Ginger Industry Strategic Plan. This was derived from a number of meetings of:

- the Industry’s peak body,
- the industry association of growers
- the broader levy-payer’s group and
- RIRDC’s Ginger Industry R&D Advisory Committee.

A number of surveys during these meetings produced an agreed list of R&D strategies and priorities, as well as deriving an order of priority for each of the R&D strategies. The order of priority for this list is reviewed whenever the Association and Levy-payer’s groups meet, the last occasion being in June 2012.

The Australian Ginger Industry R&D Priorities and Strategies align well with the Federal Government’s National Research Priorities, their Rural Research Priorities, and RIRDC’s Corporate Objectives

Alignment with National Research Priorities and Rural Research Priorities

RIRDC is a statutory authority established by the Primary Industries and Energy Research and Development Act 1989 (PIERD Act). The Corporation was established by the Australian Government to work with industry to invest in research and development for a more profitable, sustainable and dynamic rural sector.

The National and Rural Research Priorities of the Australian Government provide an over-arching framework for public investment in rural research and development.

- *An environmentally sustainable Australia*
- *Promoting and maintaining good health*
- *Frontier technologies for building and transforming Australian industries*
- *Safeguarding Australia.*

The R&D priorities of the Ginger industry as laid out in this document are closely aligned with each of these National R&D Priorities:

National and Rural Research Priorities	Aligning Ginger Industry R&D Priorities, Strategies by Objectives (from Table 5.1)
<i>An environmentally sustainable Australia</i>	1.1, 1.2, 1.3, 3.1, 3.2, 3.3
<i>Promoting and maintaining good health</i>	1.4, 2.2, 2.3
<i>Frontier technologies for building and transforming Australian industries</i>	1.1, 1.2, 1.3, 1.4, 2.3, 3.1, 3.2, 3.3
<i>Safeguarding Australia.</i>	1.1, 1.2, 1.3, 3.3

The R&D priorities of the Ginger industry as laid out in this document are likewise closely aligned with each of the Rural R&D Priorities:

Rural R&D Priorities	Aligning Ginger Industry R&D Priorities, Strategies by Objectives (from Table 5.1)
<i>Sustainable natural resource management</i>	1.1, 1.2, 1.3, 2.3, 3.1, 3.3
<i>Improving competitiveness through a whole-of-industry approach that emphasises efficient and effective supply chain management;</i>	1.3, 1.4, 3.3
<i>Maintaining confidence in the integrity of Australia’s food, fish and forestry products</i>	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 3.1, 3.3
<i>Improving trade and market access</i>	1.1, 1.2, 1.3, 1.4, 3.3
<i>Making use of ‘frontier’ technologies</i>	1.2, 1.3, 1.4, 2.3, 3.1, 3.2, 3.3
<i>Protecting Australia from invasive diseases and pests</i>	1.1, 1.2, 1.3, 3.3
<i>Creating a culture of innovation, largely by investing in the sector’s most important asset – its people</i>	3.1, 3.2, 3.3

Alignment with RIRDC R&D objectives

[The Rural Industries R&D Corporation Corporate Plan 2012-17](#) sets a new direction for the Corporation; a direction with the aim of enhancing prosperity for our current and future portfolio industries and the wider rural sector.

The Plan sets the framework in which the Rural Industries R&D Corporation will conduct its RD&E activities for the period 2012-2017.

In developing the Corporate Plan 2012-2017 the Rural Industries R&D Corporation identified three main goals, (outlined below), all of which are strongly supported by this Ginger Industry R&D strategy:

- *Promote leadership and innovation in the rural sector*
- *Increase profit and productivity in rural industries*
- *Enhance sustainability across the rural sector.*

In the derivation of the 2012-17 Ginger Industry R&D Priorities and Strategies, the objectives have been aligned with the RIRDC R&D objectives in the following way:

RIRDC Corporate R&D objectives	Aligning Ginger Industry R&D Priorities and Strategies by Objectives (from Table 5.1)
<i>Promoting leadership and innovation in the rural sector</i>	3.1, 3.2, 3.3, 2.3
<i>Increasing profit and productivity in rural industries</i>	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3
<i>Enhancing sustainability across the rural sector</i>	1.1, 1.2, 1.3, 1.4, 2.3, 3.1, 3.2, 3.3

Industry Strategic Plan

The 2011-2016 Industry Strategic Plan for the Australian Ginger Industry lays out the key issues, goals and priorities for the industry. The plan has provided significant guidance in the development of this document and provides important insights into the current environment in which the industry operates and considers the potential environment in which the industry will operate in the future.

Industry Commitment

The ginger industry in Australia is facing a number of issues. *Pythium* disease, biosecurity threats and potential loss of markets are threatening the future of this industry. Accordingly, the industry members are highly supportive of investment in R&D.

As outlined in the industry's strategic plan, the industry obtained a statutory R&D levy to be managed by RIRDC. The industry's representatives of the RIRDC R&D Advisory Committee are strongly associated with the industry and its development. Several farmers have provided significant in-kind contributions by freely giving tracts of their cropping areas and samples of their produce to researchers to assist in the R&D effort.

Research: Previous and Current

The introduction of the R&D levy in April 2011 saw a number of research projects put in place to address issues identified as being a high priority in the industry's strategic plan. These are outlined below:

PRJ-008167 Ginger Industry Biosecurity Plan (through Plant Health Australia)

PRJ-008343 *Pythium* in Ginger Phase 2 – (QDAFF – PRJ 5612 - Phase one was completed last year). The first two phases of QDAFF's work on the *Pythium* problem have already started to pay dividends in terms of enabling farmers to check the spread of *Pythium* across their ginger plantations.

PRJ-008385 - Ginger Technical Support and Minor Use. This primarily funds technical input into the process for obtaining and maintaining chemical use permits for the protection of the ginger crop.

PRJ-008338 - Ginger Extension and Education Officer. This funds a part-time position that is responsible for ensuring all growers are kept abreast of the latest research findings and recommendations regarding the adoption of research-endorsed recommended changes to farming practices. The position also maintains a communication network between growers, scientists, QDAFF and RIRDC.

PRJ -008410 - Assessment of *Pythium* Diversity. This project will identify the various genotypes of *Pythium* present in the ginger industry to enable a better targeting (and testing) of amelioration methods arising from the R&D program.

PRJ-008416 - Improved Clean Seed Distribution Systems for the Australian Ginger Industry. This project has been completed. It investigated and recommended improved seed (ginger propagule) handling structures and procedures for the industry.

PRJ-008457 – Technical Recommendations for Biosecurity in the Ginger Industry.

This completed project provided entomological, nematological and pathological scientists to advise the industry on technical issues surrounding the protection of their industry from biosecurity threats. It also assisted the industry develop a scientific response to an import risk analysis around the potential import of live, diseased ginger into Australia.

The Research & Development Program

Program goals

The overall goal of this R&D program is to provide research and development in support of the industry's three strategic priorities, so as to provide a platform on which the Australian Ginger industry will grow and prosper.

Agreed strategic priorities

1. To assure industry competitiveness

R&D Objectives:

- To provide solid scientific advice to secure the biosecurity of the industry in Australia.
- To solve disease and production problems that threaten reliability and quality of the industry's produce including the development and support integrated pest management strategies.
- To provide R&D in support of the maintenance of food safety and quality assurance.

2. To build stronger linkages with customers and the market

R&D Objectives:

- To understand the market opportunities and drivers that can drive the industry's economic success in Australia and abroad.
- To provide R&D in support of education and extension activities in support of the industry.
- To supply R&D in support of increasing the level of innovation within the industry – particularly in respect of value adding.

3. To coordinate the industry's future direction

R&D Objectives:

- To build industry relationships and improve coordination, communication and industry representation relating to R&D opportunities and impacts.
- Facilitate the updating and implementation of the industry's strategic R&D Priorities and Strategies.
- Work cooperatively with the industry's growers and stakeholders, as well as with other industries to promote and facilitate industry growth through R&D.

Table 1: Program objectives and strategies

Strategic Priority One	Assure industry competitiveness			
Priority ¹	Objective		R&D Strategy	Key Performance Indicators
1.1 Ranking 2012: 1 2013: 1 2014: 2015: 2016: 2017:	<u>Maintenance of Biosecurity protection:</u>	1.1.1	Provide scientific advice to the industry on biosecurity protection. Execution = 2012-2017	Pro-active biosecurity protection and readiness is improved each year through the R&D Program
1.1.2		Provide a scientifically precise response to biosecurity threats, including import risk analyses. Execution = 2012-2017	Appropriate scientific resources are mobilised in reaction to biosecurity risks as and when they occur.	
1.1.3		Produce an industry biosecurity plan Execution = 2012-2013	Industry Biosecurity Plan is completed by 30 June 2013	
1.2 Ranking 2012: 2 2013: 1 2014: 2015: 2016: 2017:	<u>Solving Disease and production problems</u> a) <u>Field issues</u> Accelerate the rate of research and adoption of best-practice throughout Ginger product supply chains and reliability of supply with a specific focus on <i>Pythium</i> .	1.2.1	Conduct a comprehensive evaluation of existing farm production research for the control of ginger pests and diseases both within current systems and overseas review. Execution = 2013-2014	Comprehensive review of ginger diseases and control strategies completed by 30 June 2014.
1.2.2		Conduct a comprehensive research program to control, and/or minimise the impacts of <i>Pythium</i> on the industry. Execution = 2012-2017	Completion of QDAFF's <i>Pythium</i> R&D research projects (phases 1-4) over the 5 year period, including annual delivery of strategies that can noticeably stop the spread and/or incidence of the disease	

¹ The intention is that the ranking of all of the objectives will be updated each year, with current and previous rankings being updated and visible in Column 1 of this table.

		1.2.3	Facilitate the development and implementation of best-practice demonstration projects, and implement information dissemination and training programs for ginger supply chain management best practice. Execution = 2012-2017	-At least one field day held each year to impart information from R&D findings to growers -Evidence of adoption of R&D outcomes by growers responsible for at least 70% of production.
1.3 Ranking 2012: 5 2013: 3 2014: 2015: 2016: 2017:	<u>Solving Disease and production problems b): Ginger Seed and supply chain issues:</u> Improve ginger supply chain including the supply of clean ginger seed, reducing the incidence of outbreaks of disease in ginger.	1.3.1	Review seed ginger production scheme and research/test alternative models and techniques. Execution = 2012	Seed scheme reviewed by December 2012
		1.3.2	Conduct a stream of research, development and extension focussed on improving handling throughout the entire ginger supply chain to increase production quality and product consistency and thence consumer confidence in the product. Execution = 2012-2015	Evidence of : -Annual delivery to growers of outcomes from this research stream -adoption of findings across growers responsible for at least 70% of production
		1.3.3	Develop and implement a 'test scheme' for Certified Seed Producers Execution = 2014-2015	Scheme in place by June 2015
1.4 Ranking 2012: 7 2013: 6 2014: 2015: 2016: 2017:	<u>Food Safety and Quality Assurance:</u> In conjunction with other committed supply chain participants, develop and implement industry standards, product quality guarantees and assurances that become accepted as 'standard practice' for participation in ginger supply chains.	1.4.1	Review current systems of food safety including overseas requirements and document AGIA Food Safety Record. Execution = 2015-2017	-Review and on-going international updates in place - on-going documentation of AGIA Food safety compliance in place by June 2016
		1.4.2	Actively encourage the adoption of the AGIA Food Safety Record and Processing Intakes requirements via workshops and information.	Evidence of annual delivery of outcomes / training to growers. Documentation of annual improvements to food safety practices in the industry.

Strategic Priority Two	Build stronger linkages with the customer and the market			
Priority	Objective		R&D Strategy	Key Performance Indicators
2.1 Ranking 2012: 3 2013: 4 2014: 2015: 2016: 2017:	Gain a better understanding of markets to identify new <u>market opportunities</u> .	2.1.1	Undertake a review of ginger consumer research findings and analyse data relating to substitute products and the purchasing preferences of particular consumer segments as a basis for preparing check-list of consumer priority factors for each consumer class. Execution = 2013-2017	Pilot study completed by June 2013 If warranted (resources/ priorities permit), a more comprehensive project on consumer priorities completed by June 2017.
2.2 Ranking 2012: 8 2013: 8 2014: 2015: 2016: 2017:	Conduct education and extension work that promotes awareness of ginger and ginger products.	2.2.1	Research and collate accurate health and nutritional information on ginger. Execution = 2015-2017	Initial (cursory) Literature review completed by December 2015. If warranted (resources/ priorities permit), Australian product assessment project in place by June 2016.
		2.2.2	Review outcomes of promotional campaigns and their impact on ginger consumption trends. Execution = 2015-2017	If warranted (resources/ priorities permit), project in place to monitor and report to growers on consumption trends from December 2015.
		2.2.3	Perform market research to identify the potential overseas market access opportunities for Australian fresh ginger. Execution = 2012-2014	Pilot study “Analysis of Market potential for fresh and processed ginger” completed and findings delivered to growers by June 2013.
2.3 Ranking 2012: 6 2013: 7 2014: 2015: 2016:	Stimulate innovation to develop and deliver new products (including <u>value-added products</u>) that match the needs of target consumers.	2.3.1	Undertake a review of past R&D activities associated with ginger and provide a discussion paper outlining innovative ideas for value-adding fresh ginger (product development). Execution = 2013-2014	Project reviewing value-adding options and providing discussion paper completed and findings presented to growers by May 2014.

2017:		2.3.2	Scope and implement at least one R&D project for a new and innovative ginger product. Execution = 2014-2017	Value-adding project underway by December 2015 (following open-call for proposals in 2014)
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Strategic Priority Three	Steer future industry direction			
Priority	Objective		R&D Strategy	
3.1 Ranking 2012: 4 2013: 5 2014: 2015: 2016: 2017:	<u>Improve industry relationships, coordination, communication and industry representation in support of R&D opportunities and impacts.</u>	3.1.1	Establish and maintain networks/structures (including marshalling supporting resources) to enable the delivery of good industry representation in relevant R&D and other policy forums. Execution = 2012-2017	Ongoing funding/support supplied to maintain Ginger extension and communication position for the duration of the 5 year priorities and strategies. Annual feedback from industry in support of continued resourcing of position.
3.2 Ranking: 2012: 9 2013: 9 2014: 2015: 2016: 2017:	<u>Facilitate the updating and implementation of the industry's strategic R&D Priorities and Strategies</u>	3.2.1	Put in place suitable arrangements (including marshalling supporting resources) for delivering industry coordination, extension and education in respect of R&D. Execution = 2012-2017	
		3.2.2	Prioritise the strategies/actions in the industry's R&D Priorities and Strategies and set realistic target dates for the objectives and tasks. Execution = 2012-2017	Annual re-prioritisation of Industry strategies and thence R&D priorities through AGIA and levy-payer meetings.
		3.2.3	Review and update this R&D Priorities and Strategies at least annually. Execution = 2012-2017	

<p>3.3</p> <p>Ranking</p> <p>2012: 10</p> <p>2013: 10</p> <p>2014:</p> <p>2015:</p> <p>2016:</p> <p>2017:</p>	<p><u>Work cooperatively with the industry's growers and stakeholders, as well as with other industries to facilitate industry growth through R&D.</u></p>	<p>3.3.1</p>	<p>Establish effective mechanisms to track opportunities for collaboration with key stakeholder organisations.</p> <p>Execution = 2012-2017</p>	<p>Evidence of communication/meetings/teleconferences with like-industries/researchers on cross sectoral issues of mutual interest.</p>
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Proposed Budget

–	2012/13	2013/14	2014/15	2015/16	2016/17
Revenue ‘000					
Commonwealth contributions	75	80	80	80	80
Industry contributions	75	80	80	80	80

Expenditure

Strategic priority area 1: “Industry Competitiveness”

1.1 Biosecurity; : 1.2 Disease/ production; 1.3 Ginger seed; 1.4 Food Safety &QA

Strategic priority area 2: Market research/extension/Innovation”

2.1 Market Research; 2.2 Education and Extension; 2.3 Innovation & Value-Adding

Strategic priority area 3: Coordination/ communication/industry development

3.1 Coordination; 3.2 Review and execution of Priorities and Strategies; 3.3 Collaborative/ cross sectoral R&D

(Expenditure x \$1,000)

	2012-13	13-14	14-15	15-16	16-17
1: Industry Competitiveness	90	80	70	70	70
2. Market research/extension/innovation	20	40	50	60	40
3. Coordination/ communication/industry development	30	30	30	30	50
Closing Balance	10	10	10	0	0

Industry and RIRDC plan to make these financial contributions to R&D for the Ginger industry over the period 2012-13 to 2016-17. However we recognize that circumstances may prevent these contributions being made or enable larger contributions. If that situation occurs, parties will meet to review the status of the five-year R&D Priorities and Strategies and its projects and establish the circumstances influencing capacity to meet commitments. As a result:

- contributions may be reduced pro rata by both parties in the current or future years
- some projects may not proceed
- new projects may be commissioned.

Industry and RIRDC also recognize that the proportions of funding by objective in the above table reflect the priorities at the time of publication and also the strategic intent. This points to the importance of annual reviews of performance of the program against the plan and provides an opportunity to make any adjustments to the proportions allocated based on the dynamics within the industry at the time of review.

Communication/Adoption / Commercial Opportunities

The communications strategy towards the facilitation of R&D priorities and the adoption of their research outcomes is defined by the following elements:

- A carefully designed and executed communications policy for strategic R&D outcomes that facilitates access by Australian growers while ensuring the mode of communication helps create and maintain a competitive advantage for Australian growers in respect of overseas competitors.
- The utilisation of opportunities to engage relevant stakeholders in the communications strategy including the use of field days and surveys in association with growers’ association and levy-payers’ meetings.
- The incorporation of field days and fact sheets in association with each “hands-on” research finding of note/use to the industry’s growers.
- The direct engagement of industry participants in any ongoing research (wherever possible) through the use of growers’ farms for conducting R&D.
- The production of a regular industry newsletter that includes R&D outcomes/findings (distributed in such a way as to maintain any commercial competitive advantage as outlined above).

Commercialisation/IP

Commercial opportunities relating to R&D activities will be explored as they arise (for example, the derivation of any varietal development arising from any R&D conducted under this program).

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RIRDC is a partnership between government and industry to invest in R&D for more productive and sustainable rural industries. We invest in new and emerging rural industries, a suite of established rural industries and national rural issues.

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RIRDC books can also be purchased by phoning 1300 634 313 for a local call fee.



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