

# fresh matters

SUMMER 2025



# A message from the Managing Director



Our industry continues to face complex and rapidly evolving expectations around sustainability—from consumers, retailers, regulators, and trading partners. What's clear from our latest global and ANZ consumer research is that sustainability is no longer a fringe concern; it sits at the heart of how our members do business.

Consumers are telling us they want less packaging on produce and, when packaging is necessary, the majority want it to be recyclable or compostable. Complicating this, our latest survey shows only about half are willing to pay more for sustainability.

This is why our industry's sustainability journey must be grounded in commercial reality. Businesses cannot afford to invest in sustainability for sustainability's sake alone. Investments must deliver tangible returns—whether that's lower input costs, improved resilience, or enhanced market competitiveness.

We're seeing strong examples across the sector: growers adopting solar power to cut energy costs; producers exploring regenerative agriculture not just for environmental outcomes, but to reduce fuel use, build soil health, and improve long-term productivity; and businesses reducing packaging because it saves money as well as meeting consumer expectations. These are the models that will endure: sustainable solutions that also make business sense.

Our role at IFPA is to support you in finding and scaling these commercially viable solutions. Because when sustainability improves efficiency, reduces risk, and strengthens profitability, it becomes a catalyst for growth—not a cost burden.

**Belinda Wilson | Managing Director**  
International Fresh Produce Association A-NZ



**Cover Image:** Supplied by Premier Fresh Australia. Mark Smith, Farm Manager at Darwin Fruit Farms – a division of Premier Fresh Australia





# Australian Sustainability Summit

## Driving business and environmental outcomes

The IFPA Australian Sustainability Summit brought together our members with leaders from across the fresh produce sector to tackle one of the most pressing questions: How do we balance environmental goals with commercial realities? The clear message was that sustainability initiatives must deliver business outcomes alongside environmental benefits for companies to invest with confidence.

The Summit featured high-profile key-note speakers from Australia and the United States, including:

- Tamara Muruetagoiena, IFPA Vice President – Sustainability
- Sandra Dal Maso, Australian Packaging Covenant Organisation (APCO)
- Penny Reyenga, Department of Climate Change, Energy, Environment and Water

Expert panels explored critical topics: Soil Health and Regenerative Agriculture; and Sustainable Packaging, providing practical insights into how these areas can drive both environmental and economic value.

One of the standout sessions was Mulgowie Farming's case study, which shared live data following the adoption of regenerative farming practices.

Their experience demonstrated that sustainability is not just an environmental imperative—it can enhance produce quality and profitability (see page 7).

Compelling discussion followed a presentation by Roc Partners, a leading investment firm, which highlighted opportunities for fresh produce businesses to access finance for projects with measurable sustainability outcomes. Investment firms like Roc are actively seeking initiatives that strengthen operational resilience but also help large corporations meet their ESG and sustainability reporting obligations – a win-win for the entire supply chain.

**Throughout the summit, one theme was clear: collaboration is key. No single business can solve the industry's challenges alone. By working together—sharing insights, aligning goals, and leveraging collective expertise—we can accelerate progress toward a more sustainable future.**

Looking forward, we are committed to supporting members with tools, resources, and connections that enable them to thrive in this evolving landscape.

*The event was proudly sponsored by Ernst & Young, Muirs, and CHEP Australia.*

**Result Group demonstrated the latest in “natural” branding, with laser etched avocados, individually named for each attendee**



# What consumers tell us

IFPA Global Survey, November 2024 and Pulse Surveys in Australia and New Zealand, October 2025



## PACKAGING AND SUSTAINABILITY

**Most consumers believe packaging on fresh produce is not necessary but when it is, they expect it to be sustainable.**

### The packaging dilemma

1 in 3 consumers in Australia (36%) and New Zealand (39%) say they sometimes feel guilty about buying produce that comes with a lot of packaging.

### Green expectations rising

Around half of consumers in Australia (45%) and New Zealand (51%) say they expect sustainable packaging to be standard, not a special feature.

### Sustainability in the spotlight

Nearly half of consumers in Australia (43%) and 1 in 3 in New Zealand (39%) believe packaging is one of the biggest sustainability issues for fresh produce.

### Safety still comes first

However, nearly half of consumers in Australia and New Zealand (both 44%) say that food safety is more important to them than sustainability when it comes to packaging.

**Most Australian consumers (71%)** say it is important to them that there is no packaging on produce at all.

**If packaging has to be used,** the vast majority of Australian consumers say it is important that it is recyclable (84%) or compostable (77%). However, only around half would be willing to pay more for this.



## DEMAND FOR LOCALLY GROWN FRESH PRODUCE

**Australian consumers have a strong preference for locally-grown produce but few are willing to pay more.**

**77** % of Australian consumers are influenced by the country where fresh produce is grown.



More than half of Australians consumers are influenced by the carbon footprint - e.g. how produce is grown (52%) and how it is transported through supply chains (51%).



Almost half (43%) say they would be most likely to purchase produce labelled locally grown, compared with 37% for organically grown and 12% for field-grown.



## IDENTIFYING SUSTAINABLE PRODUCE

**1 in 4 consumers in Australia (26%) and New Zealand (24%) find sustainability claims on packaging confusing. What would make it easier for consumers to identify sustainable produce?**

Clearer labelling  
on packaging



A standard sustainability  
logo or certification



More information in-store  
like signage or shelf labels

Sustainable  
Choice



## THE TOP 5 INDICATORS OF SUSTAINABLE PRODUCE FOR CONSUMERS



Grown locally within  
their country



Recyclable  
packaging



Compostable  
packaging



Supports local  
communities/farmers



Grown with no or  
low pesticide use



## TERMS ON LABELLING

**Australian consumers respond most positively to terms like 'organically grown' and 'sustainably grown'. Emerging and technical terms are less appealing and understood.**

	Likely to purchase	Perceived as a quality product	Perceived as somewhat safe	Able to define
Organically grown	74%	85%	95%	84%
Greenhouse grown	80%	82%	95%	80%
Locally grown	87%	88%	97%	91%
Field grown	NA	86%	97%	NA
Regenerative agriculture	65%	74%	85%	46%
Vertically farmed	68%	79%	92%	52%



# Sustainability

FOCUS - NZ

**Gordon McPhail**

General Manager Farming  
LeaderBrand Produce



## Why did LeaderBrand Produce decide to invest in regenerative agriculture trials?

For us, healthy soil is the foundation of everything we grow. Years of intensive cropping have taken a toll on soil health, and climate change is adding even more pressure. We wanted to understand whether regenerative practices could restore soil function and improve crop performance in a real-world, commercial setting. Our goal was to find practical, science-backed solutions that work for growers like us.

## Tell us about your partnership with Woolworths New Zealand, and the Bioeconomy Science Institute Plant & Food Research Group.

Launched in 2022, the trials focus on using compost and cover crops to revitalise soil in intensive vegetable farming.

While it's still early days, the signs so far are encouraging. We've seen improved spinach and mesclun yields at one site and also evidence for improved organic nitrogen supply, which could reduce the need for synthetic fertilisers over time. A key focus is to increase soil organic matter levels. We're doing this by importing carbon in compost and also growing it onsite with cover crops.

## Where is the trial taking place?

Two sites were chosen at LeaderBrand's intensive vegetable production operation location on the Turanganui-a-Kiwa flats, near Gisborne.

At each site, two treatments or 'management zones' were implemented: a regenerative management zone subject to compost application and cover cropping; and a standard management zone where compost was withheld and fallow periods maintained.

## Seeing improvements in just three years is incredible.

Regenerative agriculture isn't just good for the land—it's good for the future of food in New Zealand. Despite the relatively short timeframe of three years, there are marked improvement in soil health, and we have seen increased yields in 4 out of 6 cash crops. A vetched cover crop returned increase Sweetcorn yields despite a 34% reduction in N fertiliser inputs. There is no doubt these practices have the potential to positively impact our soil resilience and performance. However, vegetable crop rotations can be very unique. My advice would be to take an incremental approach, testing how to best incorporate one or a few new regenerative practices into a working farm system.

## What challenges have you faced?

There have been a few. Compost consistency is a big one—nutrient levels, weed seeds, and food safety risks all need careful management. Timing cover crop establishment is also critical; plant too late and growth suffers. And while compost improved soil conditioning, it wasn't a quick-release nutrient

source, so synthetic fertilisers still played a role.

These trials reinforced that regenerative practices aren't one-size-fits-all—they need to be tailored to soil type and crop rotation.

## What does this mean for the future of vegetable farming?

We know we're looking at a future that is likely to place increasing pressure on where and how we source our fresh food.

With a growing consumer market, and one which is increasingly conscious of farming and growing practices and their impact on our environment, regenerative agriculture offers exciting opportunities to grow production while supporting a healthy ecosystem.

Far from being in opposition to intensive commercial growing systems, the data show regenerative practices can be successfully integrated for greater yields and healthier soils in an IVP setting, potentially boosting commercial outcomes, and increasing the stability of our food supply chain. We're also looking at alternatives like biochar for long-term carbon storage. Longer trials—five years or more—are essential to understand lasting impacts. Ultimately, this is about building a resilient food system for Aotearoa—one that supports growers, communities, and the environment.

## What advice would you give to other growers considering regenerative practices?

Start small. Test one or two practices—like cover crops or reduced tillage—and measure the results. Use tools like nitrate quick tests to manage nutrients efficiently. And remember, the goal isn't perfection overnight; it's progress toward healthier soils and stronger crops.



## Andrew Johanson

Sustainability and Agronomy Manager  
Mulgowie Farming Company



### What motivated you to explore regenerative agriculture?

Studying agronomy, I always had an interest in the learnings of Dr Arden Andersen and his work in sustainable agriculture and the connections between soil and plant balance.

In 1990s, not long after starting with Mulgowie, we introduced Integrated Pest Management systems, aiding in the creation of Australia's first commercial beneficial insects, such as the Trichogramma wasp. This significantly reduced the need for insecticides.

When I got an opportunity to join a tour learning from Steve Groff, operated by Bayer, it really cemented my thinking that regenerative agriculture was a smart investment and would provide market advantages. Many of the principles are now being demanded by industry and across the supply chain.

### Tell us about the key difference.

Conventional horticulture requires a lot of soil disturbance. We rip the soil, break down the soil structure and rotary hoe. This damages soil life and water infiltration and adds significant costs including fuel and tractor hours.

Regenerative farming minimises soil disturbance. Less tillage means more microbiology and worms. The worms till the soil for us. We're reducing water usage, reducing irrigation loss and reducing run off into our rivers and increasing soil carbon. For each 1% of carbon in your soil, it can hold an extra 150,000

litres more water per hectare. Between harvests we use a manure compost and a landform cover crop to rebuild soil health, then if dry enough, we rotate grazing stock through the paddocks to clear the cover crop and with minimal soil disturbance and return nutrients to the soil through their manure.

### Is water savings the only benefit?

We have achieved significant cost savings by improving soil health and reducing inputs. For example, minimal tillage has reduced tractor hours, labour, and fuel consumption by up to 43% over three years. Synthetic fertiliser use dropped by about 40%, and nitrogen uptake improved through better nutrient strategies. These changes lowered costs while enhancing crop quality and yield—proving that sustainability and profitability can go hand in hand.

### Tell us about your trials

Using Buckwheat as the cover crop we trialled a Zero Till planting method to grow Sweetcorn. We discovered corn planted directly into the Buckwheat produced an 11% higher yield compared to standard corn planted adjacent to it.

### Then you planted Green Beans into the Mulched Sweetcorn Stubble and discovered nutrition benefits.

This is when it got exciting. Not only did we see reduced costs in the growing process and increased

yields, we also discovered our beans were more nutritious – we were growing food as medicine.

Our Mulgowie Green Beans had significantly lower levels of nitrate nitrogen leading to improved shelf life, quality and flavour, delighting our customers.

In summary: Mulgowie's Motto is **Healthy Soil, Healthy Plants, Healthy People.**

### Do you have any advice for others ready to adopt regenerative agriculture techniques?

The cultural shift came from demonstrating tangible benefits—better yields, lower costs, and healthier soils—which built confidence and buy-in across the team.

Partner with experts and embrace continuous learning; regenerative agriculture is a journey, not a destination.



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