

NSW blueberry industry

Economic and social benefits report

Prepared for the Australian Blueberry Growers' Association
25 August 2026



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Assumptions and data sources

All assumptions and data sources are documented in relevant sections throughout this report.

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Executive Summary

Industry overview

Blueberries have become firmly established as a regular household fruit purchase, with average annual consumption tripling from 0.33 kg in 2016 to 0.98 kg in 2025. Almost 90% of production is supplied for the fresh domestic market.

Australia's core blueberry production area is centred on the Coffs Coast and broader northern NSW region, with the industry a major contributor to these regional economies and communities.

Before the establishment of the blueberry industry, the region was strongly associated with banana farming. However, the decline in banana production in the early 2000s paved the way for the significant acceleration of commercial blueberry farming, with the region a positive example of a successful agricultural transition.

Economic importance

In 2024/25, the blueberry industry in the Coffs Coast region generated an estimated total gross value of production of **\$590.3 million**, including direct and indirect effects. The industry also contributed an estimated **\$479.6 million** in value added to the regional economy and supported approximately **2,785 FTE** jobs. These figures confirm the industry's importance as one of the region's most significant agricultural activities.

The industry is also labour intensive, resulting in workforce numbers rising substantially during peak harvest periods, supporting large numbers of seasonal workers and providing additional income opportunities for local businesses.

The economic contribution of the industry extends beyond blueberry farms themselves. Blueberry production underpins demand for a broad range of regional suppliers, generating important second-round effects throughout the local economy. The scale of the industry also reinforces the broader economic identity of the Coffs Coast as a productive and nationally significant horticultural region.

Social benefits

The industry also delivers important social benefits. It provides a diverse mix of employment opportunities, from entry-level and seasonal roles through to long-term skilled careers roles. These roles help retain workers and families in regional areas, support local population stability and create pathways for people to build careers without leaving the region.

Many growers and industry-linked businesses contribute to their community through supporting local sporting clubs, schools, community organisations and charitable initiatives. In addition, major growers also contribute significantly to education and workforce development through scholarships, graduate programs and engagement with schools and tertiary institutions.

Industry investment and advancement

A key enabler of the economic and social outcomes has been the adoption of modern farming methods, particularly protected cropping systems such as polytunnels. These systems improve yield, fruit quality and seasonal reliability, while reducing exposure to weather risk, pests and disease. When combined with substrate growing and precision irrigation, they also support more efficient water and nutrient use and contribute to better sustainability outcomes.

Right to farm

As the industry continues to invest in modern intensive horticulture, it is essential that planning frameworks protect the right to farm on appropriately zoned agricultural land. Clear and consistent recognition of blueberry production and associated protected cropping systems as legitimate agricultural activity will be critical to securing continued investment, productivity and community benefit in the Coffs Coast and broader northern NSW region.

Economic Impact Snapshot

Coffs Coast and northern NSW



\$590.3m

Total gross value of production



\$479.6m

Total value added



2,785 FTE

Total employment supported



Peak seasonal workforce
above FTE estimate



Growers



Suppliers



Jobs



Community



1

Introduction



1.1 Project brief

This report has been prepared for the Australian Blueberry Growers Association (“ABGA”) to assist in communicating the economic and social contribution of the NSW blueberry industry to government and to the broader community.

Australian blueberry production is largely concentrated in northern NSW. The focus of the analysis is primarily on the Coffs Coast region, from Nambucca Valley to Clarence Valley, while recognising the contribution of other northern NSW production areas to national supply.

The report provides an assessment of the industry’s economic output, employment, social contribution, grower and supplier profiles, farming practices, sustainability initiatives and planning considerations. It is informed by stakeholder consultation, case studies and analysis of relevant data and publications, including ABS and Hort Innovation sources, to provide a clear account of the industry’s regional significance.



1.2 Regional context

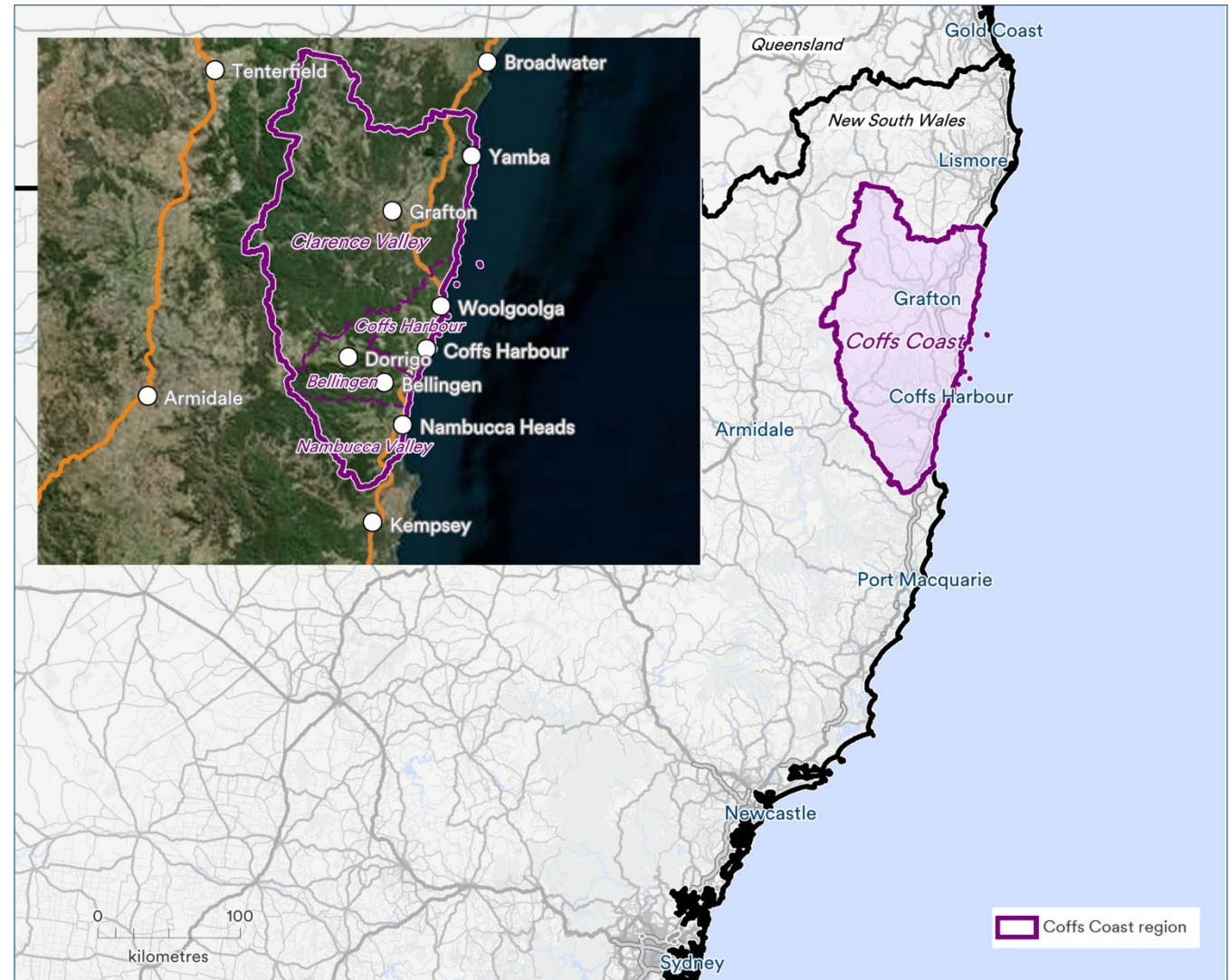
NSW accounts for almost 80% of Australia's blueberry production, with northern NSW forming the core production region.

Production is concentrated in and around Coffs Harbour on the Mid North Coast, referred to in this report as the "Coffs Coast region".

The Coffs Coast region comprises the local government areas of Nambucca Valley, Bellingen, Coffs Harbour and Clarence Valley.

Coffs Harbour, with an estimated urban population of 77,244 in 2025, functions as the principal commercial and service centre for the broader region.

Figure 1—Regional context



Source: Deep End Services; Mapinfo

2

Blueberry industry overview



2.1 Overview

The Australian blueberry industry has evolved into a high-value sector valued at over \$530 million in 2025

Australia's blueberry production is centred around the Coffs Harbour region

Background

From its origins as a small niche industry in the 1980s and 1990s, the Australian blueberry industry has grown into a major horticultural sector.

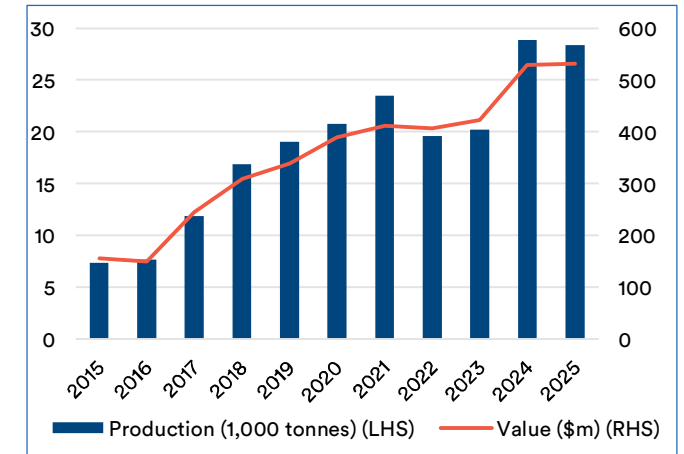
The first commercial blueberry plantings occurred in Victoria in 1974 before expanding to other states, although the industry remained relatively small until the early 2000s. Since the mid-2000s, production has expanded rapidly from an estimated 2,400 tonnes valued at **\$24.0 million** in 2004 to more than 28,000 tonnes worth over **\$530 million** in 2025. Blueberries now account for almost one quarter of Australia's berry production by volume and nearly 40% of value.

As a manually picked fruit, blueberries are both labour intensive and capital intensive to produce. Production systems are almost entirely protected cropping under netting and tunnels but can either be grown in soil or substrate. Substrate production, involving blueberries grown in pots under polytunnels, is becoming increasingly common as it supports higher yields, improved fruit quality and more efficient management practices.

Production regions

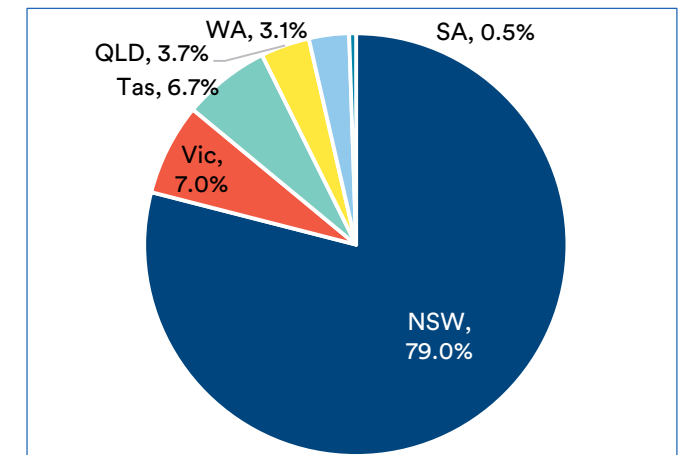
Blueberries are grown in all states although NSW is by far the most significant producer. Typically, the state accounts for around 80% of the nation's output. Within NSW, blueberry production is centred around the Coffs Coast region due to its highly favourable climatic conditions.

Figure 2—Australian blueberry output and value



Source: Hort Innovation 'Australian Horticulture Statistics handbook'

Figure 3—Production by State, 2024/25



Source: Hort Innovation 'Australian Horticulture Statistics handbook'

Almost 90% of production is supplied for the fresh domestic market

47% of households purchased blueberries

Annual per capita consumption rate 0.98 kg

Blueberry consumption

Blueberries are now a mainstream fresh fruit category in Australia, with domestic consumption the primary market for Australian blueberries. Almost 90% of production is supplied for the fresh domestic market and approximately 9% is processed. Export sales are currently a small share of industry output, accounting for 3% of overall production in 2025. The vast majority of fresh blueberries consumed in Australia are grown in Australia with most imported fresh blueberries coming from New Zealand. Conversely more than 80% of frozen blueberries are imported, predominantly from Chile, Peru and China.

Raw blueberries sold in punnets through retail channels such as supermarkets, greengrocers and other produce outlets accounts for most fresh supply end use. The remaining fresh supply (approximately 14%) is sold into foodservice uses (i.e. cafes and restaurants).

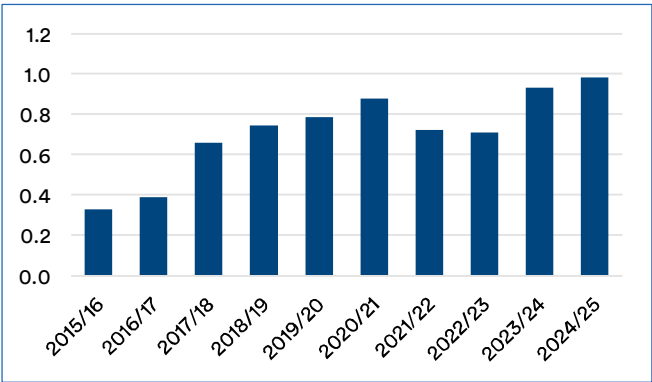
Household penetration

Blueberries have become firmly established as a regular household fruit purchase, with household penetration increasing from approximately 41% in 2016 to 47% in 2025. Per capita consumption has tripled over the same period, rising from 0.33 kg in 2016 to 0.98 kg in 2025.

The increased popularity of blueberries within Australian domestic consumption patterns aligns with an increase in snacking culture and reflects the fact that blueberries are a fresh, tasty and healthy staple. As a nutrient-dense fruit high in antioxidants, blueberries provide dietary fibre, vitamin C and other micronutrients, making the fruit a clear healthy choice option.



Figure 4—Australian blueberry consumption per capita (kg)



Source: Hort Innovation 'Australian Horticulture Statistics handbook'

Blueberry availability

A key implication of the growth in blueberry consumption is an expectation from consumers for blueberries to be available on a consistent basis. Supply is classified as high for the major producing state of NSW for 7 months of the year and low to moderate for a further 2 months. Production areas in other states assists in providing year-round supply.

The continued investment and development by the industry and its leading growers is enabling increased quality, volumes and availability.

Ongoing investment in the industry is essential to support community expectations for fresh year-round supply of locally produced product at reasonable prices.

Health benefits of blueberries

A fresh, convenient and nutrient-dense fruit for everyday diets.



Vitamin C

Supports normal immune function and contributes to skin and tissue health.

Dietary fibre

Supports digestive health and can help contribute to satiety as part of a balanced diet.

Antioxidant compounds

Contains anthocyanins and other naturally occurring compounds associated with antioxidant activity.

Easy everyday use

Simple to eat fresh or include in breakfast bowls, yoghurt, smoothies and home baking.

General nutrition messaging only. Individual health outcomes depend on overall diet and lifestyle.

The export story

Exports currently account for a very low proportion of industry output (3%). However, over the next five years, the Australian blueberry sector is poised to significantly expand its export profile, led by a transformative trade agreement with Vietnam. The newly unlocked Vietnamese market alone is projected to grow from around \$4 million in first-year exports to \$22 million annually within five years. This opportunity is supported by Australia's premium product quality, with berries valued in Asian markets for their size, firmness and sweet flavour profile, as well as Australia's proximity to Asia, which enables fast air-freight delivery and strong shelf-life outcomes.

Beyond Vietnam, industry agreements with Chinese trade networks are helping lay the groundwork for future market entry, subject to biosecurity approval. When access is secured, Australia's premium berry quality and ability to supply during China's winter shortage window will support high-margin returns. This industry funded multi-market expansion, alongside established premium markets in Hong Kong and Singapore, serves as a vital economic engine, supporting regional employment, incentivising advanced infrastructure investment and stronger export earnings for Australian rural economies.



2.2 What's happening in blueberries?

Major producers are Costa Group, Mountain Blue and the Oz Group Co-Op (representing approximately 150 growers across the region)

NSW industry overview

Blueberries are native to North America. Australian blueberries were first commercially grown in Victoria in 1974, with plantings occurring on the northern coast of NSW a decade later.

After the introduction of commercial blueberry farming in the mid 1980s, production in Coffs Harbour and broader northern NSW region accelerated significantly from the late 1990s and early 2000s onwards, which has led to the region becoming the nation's core blueberry production area.

Initially consisting of mostly small family farms, the industry has evolved on the back of increased consumer demand, supermarket supply chains and significant investment in genetics and farming practices. This has resulted in a multi layered local industry structure, from small growers to mid-sized commercial family farms and through to large vertically integrated agribusinesses.

The two largest blueberry producers are:

- **Costa Group** – a single producer with a large-scale blueberry production operation focused in Corindi.
- **Mountain Blue** – family owned and operated company with berry farming operations focused in northern NSW.

Overall, the Costa Group and Mountain Blue account for approximately 26% of NSW's blueberry production and 22% of Australia's total production.

The industry also has a significant farmer-owned cooperative, Oz Group, which represents approximately 150 growers across the mid-north coast of NSW.

Oz Group offers significant benefits to smaller and mid-sized growers, including providing a centralised packing facility in Coffs Harbour, along with distribution and marketing facilities to enable access for smaller growers end use markets.

The Berry Collective ("TBC") is a joint venture between Mountain Blue and Oz Group. It manages retailer relationships, brand marketing, sales and finance functions, and supply chain planning for member packhouses across Australia.

TBC markets blueberries, raspberries, blackberries and strawberries, and draws on Mountain Blue's world-renowned breeding programs for its varieties, setting it apart from other groups. It represents more than 200 growers nationally.

In New South Wales, TBC manages approximately 1,400 hectares of blueberry production in the Coffs Coast Region, for approximately 170 growers, spanning Southern Highbush (Winter/Spring) and Rabbiteye varieties (Summer). It also manages substantial grower operations in Far North Queensland, South East Queensland, the Northern Rivers region of NSW, Victoria and Western Australia. The Collective currently markets over 10 million kilograms of blueberries annually, a figure expected to rise to more than 12.5 million kilograms in the coming years.

Oz Group's grading and packing facility in Coffs Harbour also receives blueberries grown in the region for Driscoll's, the leading marketer of blueberries in Australia.

A driving force behind Driscoll's market positioning is its joint venture with Costa Group. Driscoll's markets all of Costa's blueberries and is by far its largest grower.

Overall, Driscoll's has approximately 100 contract growers in the Coffs Coast region growing Driscoll's blueberry genetic varieties provided by the company. These growers supply approximately 5,000 tonnes of blueberries to Driscoll's.

Banana farming was the dominant agricultural industry in northern NSW before blueberries

The suitable climate, established horticulture land and grower capability are factors that have contributed to the successful regional transition from banana to blueberry production

Transition to blueberries

Before the establishment of blueberries, the agriculture industry in northern NSW was strongly associated with banana farming, particularly within the Coffs Harbour and Woolgoolga sub regions.

Up until the 1980s, northern NSW was Australia's dominant banana-producing region. However, the industry was declining in the Coffs Harbour and northern NSW region by the late 1990s.

Overall, NSW accounted for 23% of national banana production in 1995. Thirty years later, NSW represented just 4% of Australia's output. The decline of banana growing in the core Coffs Coast region has been influenced by several factors such as:

- The expansion of banana production in northern QLD on larger and flatter tropical farms
- Northern NSW banana farms being located on steep hillsides making mechanisation difficult
- Coastal land around Coffs Harbour becoming more attractive for lifestyle uses
- Increased production of bananas driving prices lower and making smaller farms less viable.

These conditions resulted in many former banana-growing families in the region diversifying into blueberries. The area's suitable climate, established horticulture land, grower capability and access to the larger eastern seaboard population base are key factors that have driven the success of the blueberry industry in the northern NSW region.

The evolution into a major blueberry production area reflects a successful regional agricultural transition and one that enables the region to retain its identity as a significant horticulture production region.

Contribution of the Sikh community to the region

The Punjabi Sikh community has spent over a century shaping the agricultural, economic and cultural landscape of the northern NSW region. Originally cane cutters and hawkers, the community established its permanent roots during World War II, when wartime labour shortages allowed Sikh men to settle and work on local banana plantations. Through thrift and generational agricultural expertise, these families transitioned from labourers to landowners, eventually operating 90% of Woolgoolga's banana farms by the 1990s.

When market competition from North Queensland threatened the local banana industry, the community executed a highly successful agricultural pivot. This involved removing their banana crops and investing in blueberries via the farmer-owned Oz Group Cooperative in 2001 which revolutionised Australian horticulture.

Beyond economic success, the community-built Australia's first purpose-built Gurdwara in Woolgoolga in 1968, followed by the Sikh Heritage Museum of Australia. Today, these pioneering multi-generational families are deeply integrated into the fabric of regional life, driving local tourism through events like Curryfest and holding influential civic and political leadership roles.

Blueberry varieties and genetics

Commercial blueberries grown in Australia are mainly grouped into three varieties:

- Southern Highbush
- Rabbiteye
- Northern Highbush.

Areas with a warmer climate grow Southern Highbush and Rabbiteye varieties (low chill) and cooler regions grow Northern Highbush (high chill) varieties.

The low-chill Southern Highbush blueberry variety type is the main genetic base for the blueberry industry in the Coffs Coast region.



Many phases are involved in the production cycle for blueberries, starting from research and development through to distribution to end uses

Production cycle overview

Before reaching their end use stage, commercial blueberries move through many stages of the production cycle with the key stages being:

1. Research and development: The cycle commences with breeding, varietal selection and production-system development
2. Nursery plants / seedlings: Farms generally established from licensed nursery-supplied plants and propagated
3. Site preparation and planting: Involving raised beds / mounds or gro-bags or pots, irrigation, fertigation and netting/tunnels, followed by establishment of young plants
4. Growing and crop management: Irrigation, nutrition, pruning, pest and disease control
5. Harvesting: Multiple pick passes as berries ripen
6. Grading, packing and cooling: Grading and packing into punnets and cooling
7. Transport: Fast refrigerated transport into market channels
8. Distribution: The fresh domestic market is the dominant distribution channel with only a small percentage exported or processed
9. End uses: Predominately consumed as a fresh snack. However, the versatility of blueberries is wide-ranging, with popular secondary uses including adding blueberries as an ingredient in home baking, smoothies and yoghurts. Fresh food service, frozen and processed fruit are common secondary end channel uses.



Australian blueberry production – end-use categories

Distribution channels

Fresh Retail ~23,100 t/yr



Distribution to supermarkets,
greengrocers and other
produce outlets

Fresh Food Service ~3,700 t/yr



Distribution for use in cafes,
restaurants, bakeries and
other catering services

Processing ~2,500 t/yr



Supply to food manufacturers for input
into processed food and beverages and
frozen blueberry products

Exporting ~800 t/yr



Exporting mostly to Asian
destinations – with Hong
Kong and Singapore
accounting for over three-
quarters of demand

Downstream uses

Fresh Snacking



Home Baking



Home Breakfast



Home Smoothies



Retail Smoothies



Retail Meals



Commercial Pastries



Cocktails & Beverages



Individually Quick Frozen (IQF) products



Dairy Products



Jams & Sauces



Dried & Snack



3

Economic importance



3.1 Approach

This section of the report analyses the economic importance of the blueberry industry in the Coffs Coast and northern NSW region.

The modelling has been based on available data sets which include:

- ABS Agricultural Commodities statistics
- Australian Horticulture Statistics handbook
- Detailed modelling undertaken by The Centre for International Economics (CIE) in their report *Contribution of Australian horticulture industry* (2023).

The methodology to estimate the value of blueberries to the Coffs Coast region comprises the following steps:

- Blueberry production volume in NSW is estimated by applying the state's average share of Australian blueberry production between FY22 and FY24 to the latest FY25 national production volume as reported in the Australian Horticulture Statistics Handbook
- The total value of NSW blueberry production in FY25 is estimated by applying the national average blueberry value per tonne to production volumes.
- Production value in the Coffs Coast region is then estimated by applying the region's share of total NSW blueberry production value (95%) according to ABS Agricultural Commodities statistics.
- The contribution of fruit processing is calculated by applying the ratio of processing to total gross value of production and industry value added, as contained in the CIE report with respect to the Coffs Harbour – Grafton region.

- Employment, expressed in full time equivalent (FTE) terms, has been estimated using CIE data with regard to average gross value of production per FTE and average value added per FTE.
- For each of these measures (i.e. gross value of production, gross value added and employment) indirect effects have been calculated by applying relevant industry multipliers as set out in the CIE report.

3.2 Coffs Coast economic context

Coffs Coast economic activity

The Coffs Coast region, encompassing large rural areas as well as urban centres and coastal communities, has a diverse economic and employment base.

Regional economic data has been sourced from Economy.id, based on National Institute of Economic and Industry Research (“NIEIR”) statistics and collated for the four local government areas comprising the Coffs Coast region.

As shown in Table 1, the region’s industry structure is weighted towards construction and population-serving sectors such as health-related services, retail, education and training. However, the table also highlights the importance of primary production for the region, with the value of output over \$470 million in 2024/25. The output of Agriculture alone was \$463 million, equivalent to 98% of the value of the broader Agriculture, Forestry and Fishing output for the region shown in Table 1.

Overall, the Coffs Coast region is a significant NSW regional services and agriculture economy, with the economic identity of the region strongly influenced by agriculture.

Table 1—Coffs Coast economic indicators by industry sector, 2024/25

Industry	Output (\$m)	Employment (FTE)	Value added (\$m)
Construction	1,384.8	8,021	813.8
Health Care and Social Assistance	1,041.5	11,898	1,315.7
Retail Trade	625.0	4,942	666.6
Agriculture, Forestry and Fishing	471.9	4,345	378.9
Education and Training	465.0	5,810	607.9
Accommodation and Food Services	453.1	3,865	427.4
Professional, Scientific and Technical Services	449.0	2,288	344.6
Rental, Hiring and Real Estate Services	440.1	721	249.4
Manufacturing	427.0	2,341	337.0
Public Administration and Safety	421.8	3,966	499.6
Administrative and Support Services	335.1	1,649	322.5
Transport, Postal and Warehousing	297.6	2,038	265.2
Electricity, Gas, Water and Waste Services	280.7	611	164.4
Financial and Insurance Services	254.6	727	227.9
Wholesale Trade	238.3	836	199.8
Other Services	171.1	2,378	177.3
Information Media and Telecommunications	134.8	288	78.2
Arts and Recreation Services	85.9	627	44.7
Mining	38.8	125	15.9
Total industries	8,016.1	57,476	7,136.8

Source: .id (informed decisions)

Note: All \$ values are expressed in 2023/24 base year dollar terms.

3.3 Agriculture and blueberries

Value of blueberry production estimated at over \$430 million for the Coffs Coast region

Value of blueberries

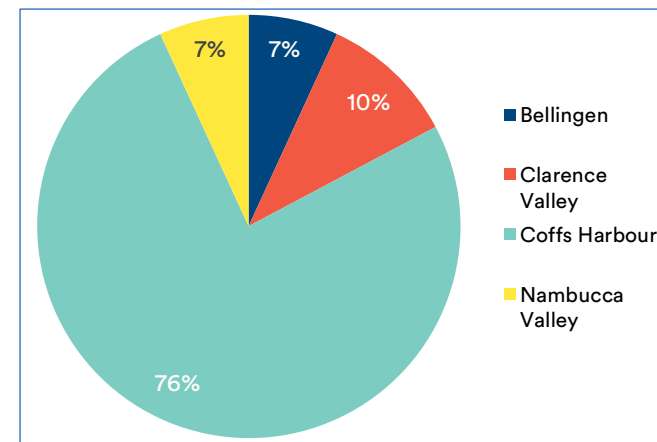
As a major agricultural hub, the Coffs Coast is a nationally significant horticultural production area where intensive horticulture is dominant.

Blueberries are the main intensive horticultural commodity, and the value of blueberry production has been estimated at **\$430.7 million** for the Coffs Coast region in 2024/25.

The broad distribution by municipality for the Coffs Coast region, based on ABS statistics for the category 'Berry Fruit excluding Strawberries' – the relevant category for blueberries (with rubus fruit also included in the category) – is shown in Figure 5.

The economic contribution of the blueberry industry to the Coffs Coast region is set out on the following pages. These contributions are measured in terms of the gross value of production, gross value added and employment, for 2024/25.

Figure 5—Distribution of the value of Berries (excl. strawberries), Coffs Coast region



Source: ABS



3.4 Economic benefits of the blueberry industry

Direct economic benefits of the blueberry industry (growing and processing) for the Coffs Coast region estimated at:

- *Gross value of production \$473.8 million*
- *Gross value added \$387.9 million*

Gross value of production

Direct effects

For the Coffs Coast region in 2024/25, the gross value of production (“GVP”) for the blueberry industry was estimated at:

- **\$430.7 million** for blueberry growing
- **\$43.1 million** for blueberry related processing

As a result, the gross value of production for the blueberry industry in the Coffs Harbour region was estimated at **\$473.8 million**.

Indirect effects

The direct contribution of the gross value of blueberry production and processing also produces indirect benefits due to flow on effects in the wider economy through the generation of additional business and jobs.

These indirect and induced benefits are valued as a multiplier effect. Based on detailed CIE modelling, every dollar of total industry production is estimated to generate an additional 25 cents elsewhere in the economy.

With a GVP of \$473.8 million in 2024/25, the indirect contribution of the blueberry industry in the Coffs Coast region was estimated to be **\$116.5 million**.

Total

The total value of the blueberry industry for the Coffs Coast region was **\$590.3 million** in 2024/25.

Gross value added

Direct effects

The value added of the blueberry industry in the Coffs Coast region was estimated at **\$387.9 million** in 2024/25, consisting of:

- **\$376.6 million** for blueberry growing
- **\$11.3 million** for blueberry related processing.

Indirect effects

It is estimated that for every dollar of blueberry growing and related processing value added, the net impact in other sectors of the economy was an additional 24 cents.

As a result, the \$387.9 million in value added generated an additional **\$91.7 million** elsewhere in the economy through indirect effects.

Total

Overall, the blueberry industry was estimated to make a total contribution of **\$479.6 million** in Gross Regional Product within the Coffs Harbour region in 2024/25.

A total of 2,496 FTE jobs are supported due to the blueberry industry in the region, with most of these jobs retained locally

Employment

Direct

Direct employment in the Coffs Coast region blueberry industry was estimated at **2,496 Full-Time Equivalent ("FTE")** in 2024/25, with most jobs linked to blueberry growing.

Indirect

Beyond these direct jobs, the blueberry industry also supported an estimated **288 FTE** jobs elsewhere in the regional economy through multiplier effects.

Total

Together, this meant the blueberry industry supported an estimated **2,785 FTE** jobs across the Coffs Coast region.

The blueberry industry is labour intensive and relies on a large seasonal workforce – including significant numbers of backpackers on working holiday visas – for picking and packing during harvest and providing significant support to the local tourism industry. As a result, workforce numbers can be significantly higher at peak times than the assessed total employment of 2,785 FTE.

This is evidenced by the large producer Costa Group, where the seasonal workforce reaches approximately **1,000** workers at peak harvest.



Summary of economic benefits

The blueberry industry is a major contributor to the regional economy, generating substantial output, supporting significant employment and seasonal work, and creating wider benefits through multiplier effects.

Table 2 summarises the key economic benefits of the blueberry industry to the Coffs Coast region:

- Total GVP of **\$590.3 million**
- Total value added of **\$479.6 million**
- Total employment of **2,785 FTE**

Table 2—Estimated blueberry contribution to the Coffs Coast regional economy, 2024/25

Measure	Direct	Indirect	Total
GVP (\$m)	473.8	116.5	590.3
GVA (\$m)	387.9	91.7	479.6
Employment (FTE)	2,496	288	2,785

Source: Deep End Services; ABS; Hort Innovation; CIE Economics



4

Industry operations



4.1 Growers

Leading growers

The two largest blueberry producers in NSW (and Australia) are Costa Group and Mountain Blue. These companies are prominent leaders in the industry, with large scale, vertically integrated operations and combined, account for approximately 26% of NSW's blueberry production and 22% of Australia's total production.

- **Costa Group** – a single producer with blueberry production in Corindi at the largest berry farm in Australia. The company also has an extensive genetic breeding program. All production is marketed through Driscoll's, a leading berry marketing company.
- **Mountain Blue** – family owned and operated company with berry farming operations focused in northern NSW. Established in 1978, the company is a large-scale berry producer as well as operating a genetic breeding program and an extensive nursery and marketing service. Along with blueberries produced on its own farms, Mountain Blue production is supplemented by a network of third-party contract growers. The company sells all blueberries produced through its marketing service.

Employment

Costa Group and Mountain Blue are significant employees and invest heavily in the training and development of a skilled local workforce.

- Costa Group – Approximately 120 permanent employees and up to an additional 1,000 casual workers during peak harvest season.
- Mountain Blue – overall workforce of up to 1,130, with approximately 260 FTE staff

Areas of employment range from farm hands / nursery hands, harvest and site managers and supervisors, packing shed operators and machine operators, agronomists, workshop teams / irrigation teams, research and development and finance, administration and human resources.

Grower profile: Costa Group

Costa Group has grown from a small family business over 100 years ago into one of Australia's largest agribusinesses.

As a leading Australian berry grower, Costa has berry farms across four states, with its largest berry production location on the Coffs Coast region at Corindi. The Corindi site has been operational since the early 1980s and Costa has invested significant capital into developing the site into one of the nation's most productive berry farms.

The Corindi farm is a significant contributor to the local Coffs Coast economy. With year-round operations, the site provides a sustained employment base with over 120 permanent employees as well as a large casual workforce. During peak harvest (late October – early November), the Corindi farm alone employs approximately 1,000 additional workers. The seasonal and permanent workforce generates significant economic benefits to the Coffs Coast economy while also providing long-term careers for locals. Costa also aims to empower the next generation through their graduate programs and university scholarship offerings.

The impact of the Corindi farm extends to an international scale, with the site responsible for developing world leading genetics and intellectual property. This has led to Costa Berries successfully exporting blueberries across Asia and Europe as well as developing farms in China and Morocco.



Costa has implemented technologies like FarmRoad to greatly enhance its breeding and selection processes



University students James and Tarun funding their studies through blueberry picking

Other commercial growers

Over 70% of NSW blueberry production is supplied by small to mid-sized growers, with many of these growers' members of the 100% Australian farmer-owned cooperative Oz Group.

These growers typically operate family-owned farms ranging from small scale farms less than 5 hectares and 15 hectares or more for larger-sized commercial operations.

Industry figures suggest there are more than 160 blueberry farmers in the northern NSW region alone and Oz Group represents approximately 150 of the region's growers. The size of the farming operations for Oz Group growers is shown in Table 3, noting some have multiple farms.

Table 3—Key metrics for Oz Group blueberry growers

Land production area (ha)	Farms (no.)	Plants (no.)
Less than 1 ha	24	10,160
–1-2 ha	15	71,012
–2-5 ha	40	438,089
5-10 ha	56	1,278,791
10-15 ha	21	837,106
15-20 ha	9	516,133
20+ ha	9	737,800
Total	174	3,889,091

Source: Oz Group

Grower profile: Saro Family Blueberry and Blackberry Farms

Saro Family Blueberry and Blackberry Farms is a family-owned and operated berry business in Corindi, managed full-time by Paul Saro and supported by longstanding family involvement in the local horticulture sector.

The farm comprises a 20-acre property within the blueberry heartland of Corindi, supplemented by a further 10-acre leased property nearby.

The Saro family has deep ties to the local area and to berry farming, with Paul's father having worked for Costa Group before acquiring the family farm.

Paul moved away from the local area to attend university and built a career in business banking with CBA and NAB before returning to the community and taking over the family farming operations from his father in 2016.

The family has grown blueberries for around 16 years, with annual production of approximately 45,000 to 50,000 trays, equivalent to around 65 to 75 tonnes, using blueberry genetics oriented towards Costa and Driscoll's varieties.

The business is also increasing its use of substrate production as part of its blueberry operations, reflecting an ongoing focus on production efficiency and crop management.

As a member of the Oz Group Cooperative, all production is taken to the Oz Group packing facility in Coffs Harbour before being marketed and distributed by Driscoll's.

Paul manages and operates the farm full-time with assistance from his father, and employs seasonal workers through a labour hire company during key harvest periods.

Beyond farm operations, Paul provides practical support to seasonal workers through frequent BBQs, access to vehicles and helping to facilitate participation in local sporting teams, while also contributing to community initiatives funded and sponsored by Oz Group members.

Local grower Paul is just one example of how family-run blueberry farms underpin the Coffs Coast berry industry through local employment, supply-chain participation and community contribution.

4.2 Suppliers

As a high-value horticultural crop with multiple production stages, the blueberry industry relies on a wide range of suppliers, from specialist agricultural input businesses to packaging manufacturers and logistics providers.

Typical goods supplied to the industry through various businesses include:

- Nurseries and plant materials
- Fertilisers and crop protection products
- Irrigation systems
- Infrastructure such as netting and protective structures
- Tractors and other machinery
- Packaging materials
- Cold chain infrastructure, such as cooling fans and refrigerated cool rooms
- Refrigerated transport and logistics services.

Typical service suppliers include:

- Marketing and distribution partners
- Agronomists and technical advisers
- Labour hire providers

Many of these suppliers are local businesses, with the blueberry industry providing an important source of ongoing demand and support for their operations.

Supplier profile: Advanced Plumbing and Irrigation

Advanced Plumbing and Irrigation is a Coffs Harbour-based business providing equipment and services to both domestic and agricultural clients. Established in 1996, the company sells, installs and services pumps, water tanks, filtration systems and associated piping infrastructure.

The business has a long-standing relationship with the Costa Group, while local blueberry growers more broadly represent a significant share of its customer base. Growth in the blueberry industry has directly supported the company's expansion, with the business increasing from five employees at establishment to 11 full-time staff today. Approximately two-thirds of employees are engaged in installation and servicing roles, with the remainder in administration.

As a well-established local business, Advanced Plumbing and Irrigation actively supports the Coffs Harbour community through sponsorships and contributions to local sporting clubs, agricultural organisations and schools.

According to Director **Bob Duggan**, the blueberry industry has been a major supporter of the business and has played an integral role in its growth and ongoing success.

5

Social benefits



5.1 Employment opportunities

The blueberry industry provides a range of employment opportunities for the regional community

The industry provides opportunities for long-term skilled local jobs

Employment opportunities and retention

As a large contributor to the Coffs Coast regional economy, the blueberry industry plays an important role in supporting local employment, as well as retaining employment, on agriculture land.

The local employment opportunities include:

- A variety of skilled employment in the production and supply chain; and
- Seasonal and lower skilled jobs, which provide opportunities for students, semi-retirees and other locals to supplement their income.

The provision of local jobs, including higher-skilled career opportunities, is integral to attracting and retaining people to the region, which helps to support a stable population base and a healthy and vibrant community.

In particular, the larger businesses in the industry provide career pathways across a range of roles, from farm and nursery operations through to agronomy, research and administration.

An example of the industry's contribution towards successful long-term career development opportunities in the local region is highlighted in the profile of Woolgoolga local Melissa Mullee at right.

Local worker profile

For Woolgoolga local Melissa, working for Costa Group has provided her with a range of life changing opportunities.

After completing her Bachelor of Agriculture, Melissa joined Costa's berry business. Melissa has enjoyed a wide range of roles and upskilling opportunities and travelled to many destinations, which has kept her in the industry in a career spanning 14 years.

Melissa's initial love for agriculture began early through helping on her parents' farm. This was further deepened by meeting her husband while working on a Far North Queensland farm.

After years of domestic and international opportunities, Melissa and her husband have returned to the Coffs Coast, armed with an array of skills, experience and an everlasting inspiration from the commitment and passion of their fellow workers on the farms.

5.2 Community contributions

Blueberry growers are major supporters of their local communities through collaborations, sponsorships and donations.

Local blueberry growers are active contributors to the health and wellbeing of their local communities and provide significant support through collaborations, sponsorship and donations.

Main areas of community support include:

- Community organisations, such as sporting clubs, hobby groups, youth groups, local societies, religious organisations and community support groups
- Schools and educational institutions
- Community events and festivals.

A survey of local blueberry growers identified most growers make a monetary contribution to community organisations and events (refer Figure 6).

Coffs Coast blueberry growers also support a range of local schools, through fundraising programs to farm visits. These visits provide school children with an introduction to blueberry farming operations, often encouraging young people to pursue local careers in horticulture.

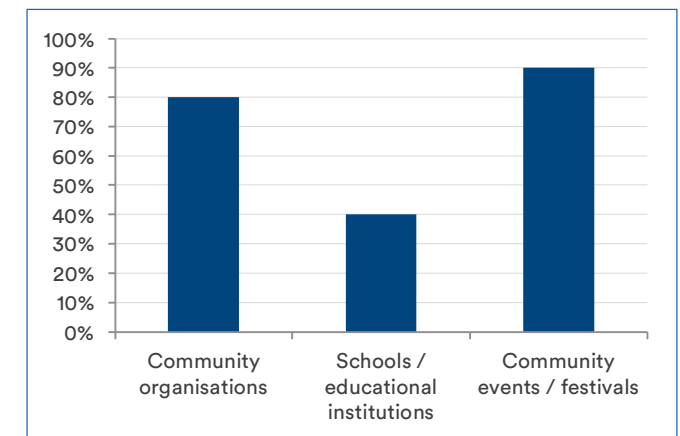
At a tertiary education level, scholarships are offered by the large blueberry growers:

- Costa Group offers a \$5,000 Berry Category Scholarship for a local horticulture student at the University of New England.
- The \$10,000 Mountain Blue Agricultural Innovation Scholarship is given to a high-performing northern NSW student who is studying an Agricultural degree at Southern Cross University

These programs provide financial support to young people who may otherwise struggle to attend university, allowing them to undertake further education to pursue a career in agriculture.

Major blueberry growers continue to provide support beyond university, such as the Costa Group graduate program which offers a pathway to a permanent, skilled local job.

Figure 6— Monetary contributions to local communities



Source: Deep End Services-administered survey of local blueberry growers

The following page provides a more detailed profile of the contribution leading grower Mountain Blue makes to their local community and broader region through sponsorship and engagement.

Mountain Blue – community engagement and support

Mountain Blue has a strong commitment to supporting local communities across the Coffs Coast and northern NSW region. As a significant regional business, the company works closely with many organisations so they can benefit both economically and socially from their ongoing presence.

The company plays an active role in education and skills development, including funding initiatives such as the \$10,000 Mountain Blue Agricultural Innovation Scholarship. These programs assist in developing the next generation of agricultural professionals and strengthening the regional skills base.

Other key initiatives include:

- Volunteering and providing produce at the Lismore Soup Kitchen and Winsome Café:
 - Operates as a food pantry with low-cost groceries
 - Hot takeaway lunches daily
 - Access to social support services
- Sponsorship of the Rous Road Community Centre in Goonellabah, where all local community organisations can meet and undertake their activities:
 - A variety of social and support groups for the local Indigenous community
 - Support for recovery from addiction.

Overall, the contribution made by Mountain Blue to the broader community through sponsorships, partnerships and local engagement is valued at over \$1 million annually.



The Mountain Blue team volunteering their time at a Lismore Soup Kitchen food drive

6

Industry investment and advancement



6.1 Research & development

The major industry operators invest heavily in research and development and are recognised globally as industry leaders in best practice and plant genetics

Australia grows some of the best blueberries in the world. Underpinning the success of the blueberry industry is Australia's leadership in blueberry genetics and varietal development, stemming from the local Coffs Coast region.

In particular, the two leading growers Costa Group and Mountain Blue have been responsible for driving significant research and development and both are recognised as global leaders in blueberry plant genetics.

Costa Group

- Expanding its world-leading blueberry breeding programme with the launch of BluGenix in May 2026
- BluGenix builds on four decades of breeding expertise and over \$20 million of investment through Costa's Variety Improvement Programme
- BluGenix will expand the program's reach into global markets and continue to develop leading blueberry varieties.

Mountain Blue

- Globally renowned for its proprietary blueberry breeding and genetics program, led by world leading expert Ridley Bell
- The key R&D milestone was the development of the 'Eureka' variety in 2008 and, since then, the company has continued to improve on Eureka, producing bigger and better tasting varieties on a quicker basis
- Breeding program operates all year round and employs 4-5 full-time staff.

Through substantial ongoing investment in R&D by the industry's leading growers, the Coffs Coast region and northern NSW continue to be at the forefront of R&D, innovation and growth of this key horticulture industry globally.

A component of this investment has driven innovation in blueberry cultivation and farming practices, as highlighted in the following pages.



6.2 Enhancements to farming practices

Protected cropping systems have become an integral part of modern farming practices

The use of protected cropping methods has led to improved yields, the ability to adapt to climate variability and increased sustainability

Contributing to the rapid expansion of blueberry production over the last couple of decades has been advancement in production systems alongside varietal development.

One of the key developments has been the evolution of protected cropping systems, with these systems now an important production method for modern blueberry growing.

Protected cropping shields crops from extreme weather, pests and diseases, enabling better fruit quality over an extended growing season.

There are several different approaches, with the main protected cropping methods being:

- Polytunnels
- Greenhouses
- Netting.

Polytunnels, sometimes combined with netting, is the most common protected cropping method used for blueberry production. These methods allow production to be viable in a variety of climates and supports extended production timeframes, meeting consumer expectations of premium quality fruit on a year-round basis.

A growing trend is also for blueberries to be grown in substrate systems under polytunnels. Substrate production shifts plants from native soil into pots or beds and reduces soil-born risks while also supporting higher-density planting and quality.



6.3 Sustainability initiatives

The blueberry industry continuously strives for improved sustainability outcomes

The Berry Good Practice Guide supports growers through best practice guidelines in adopting sustainable farming practices

The development of new production methods and protected cropping has supported improved environmental and sustainability outcomes.

A key production sustainability practice is known as substrate production which:

- Reduces water and chemical use as water and nutrients are delivered directly to the plant root zone through controlled drip irrigation
- Allows smaller and more precise doses of water and fertiliser
- Reduces run-off as excess drainage can be captured and reused or treated.

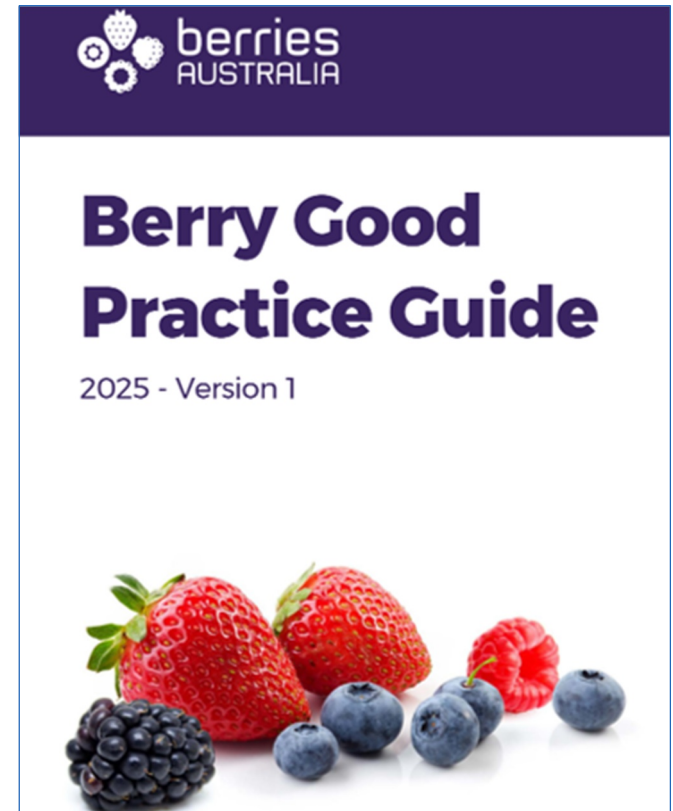
Also supporting the industry through best practice guidelines is the *Berry Good Practice Guide 2025* published by Berries Australia. This document supports Australian berry growers in adopting sustainable, responsible and resilient farming practices by providing a practical guide distilling best practice from industry experts. The guide was funded with support from the NSW Department of Primary Industries and launched by the NSW Minister for the North Coast.

Consumer sustainability practices include sustainable packaging and an example is Mountain Blue's trial of plastic-free, FSC-certified cardboard punnets across a selection of Coles stores. The trial was viewed as a positive step towards reducing plastic waste while maintaining product freshness. The success of the trial may lead to broader adoption of sustainable packaging for the industry.

A number of other key initiatives highlighting the substantial investment and importance the industry places on sustainability is summarised as follows:

- The Australian Blueberry Growers Association (ABGA) collects a voluntary levy which contributes to sustainability focused projects such as the Industry Development and Communications project and pest and disease management.
- In 2018 the ABGA along with the rubus and strawberry peak industry bodies set up Berries Australia as a joint venture to deliver professional industry advocacy and service delivery. Representatives from Oz Group Co-op, Mountain Blue and Costa sit on the Berries Australia Board reflecting the importance of this region to the wider Australian berry industry.
- The core objective of the berry industry's **Industry Development Officers (IDOs)** is to support Australian berry growers in adopting improved on-farm practices. They act as the vital bridge between scientific research and commercial farming. Managed under Berries Australia's national IDO & Communication Project, IDOs provide a nationally coordinated, locally implemented extension program to improve information flow and technological innovation across the sector. The NSW IDO is situated within the NSW DPI but funded by industry

- Berries Australia is an active member of the Coffs Harbour City Council Hearnese Lake Working Group which is looking to collaboratively address water quality concerns related to the Lake.
- Berries Australia works collaboratively with regulators such as the NSW EPA, NRAR and the Fair Work Ombudsman to assist growers in the region to understand their regulatory obligations.
- Historically the industry did not have good data on optimal rates of fertiliser application and was wasting up to 20% of fertiliser through over-application. The NSW government funded Fertiliser Stewardship program has developed clear guidelines based on Australian conditions and has also deployed physical infrastructure, including woodchip bioreactors and constructed wetlands, which successfully filter out 60–90% of nitrate runoff before it enters vulnerable local marine environments. Berries Australia has recently been granted funds from the Australian government to expand the roll out of Bioreactors
- **Integrated Pest Management (IPM)** is the core strategy used by the Australian berry industry to control pests and diseases while reducing reliance on synthetic chemicals. Spearheaded by **Berries Australia** alongside the NSW Department of Primary Industries and Regional Development (DPIRD), the framework shifts growers from regular calendar spraying to a dynamic, ecosystem-based approach. A detailed summary of the strategy is provided on the following page.



INTEGRATED PEST MANAGEMENT (IPM): Farming with Nature

What is IPM and Why Do Growers Use It?

Integrated Pest Management (IPM) is a smart, ecosystem-based strategy for managing farm pests. Rather than relying on a rigid calendar schedule of heavy chemical sprays, growers act like environmental detectives. They combine a variety of biological, physical, and targeted cultural tools to keep pest populations at a manageable level without disrupting the local environment.

Growers are rapidly shifting to IPM for several major reasons:

- **Preventing Pest Resistance:** Over-spraying can cause pests to become immune to chemicals. IPM uses multiple defence methods, ensuring pests never get a chance to adapt.
- **Cost Efficiency:** Chemical sprays and labour are expensive. By monitoring fields and only taking action when absolutely necessary, growers save significant input costs.
- **Consumer and Environmental Demand:** Modern shoppers want food grown with minimal chemicals, and local environmental rules demand cleaner farming practices that protect soil and waterways.
- **Better Tools:** Modern innovations—like protective mesh netting, plastic crop tunnels, and releasing beneficial "good bugs" (like ladybirds) to eat the pests—allow growers to manage farms without chemical intervention.

The Ultimate Benefit: Saving the Bees

The most critical advantage of IPM is how it safeguards pollinators. Because many crops rely entirely on insects to produce fruit, protecting bees is an economic necessity.

By eliminating broad-spectrum, blanket chemical sprays, IPM completely removes the risk of lethal contact or hive contamination. Any necessary, highly selective treatments are restricted to nighttime or early morning when bees are tucked safely away. Furthermore, IPM encourages planting unsprayed wildflower borders, giving honey bees and native wild species a diverse, chemical-free sanctuary to keep their hives strong and healthy year-round.

7

Challenges for the blueberry industry



7.1 Overview

As highlighted throughout this report, the fast-growing blueberry industry is the most valuable horticulture commodity in the Coffs Coast region and plays a significant role in the region's economy. However, as the industry advances and grows in prominence, evolving planning and workforce challenges are faced by growers and industry stakeholders.

Key challenges revolve around:

- Planning provisions and council authority
- Advancement in farming methods
- Visual impacts from modern farming practices
- Environmental concerns
- Workforce.

While acknowledging these challenges, the industry continues to work collaboratively with appropriate government agencies and stakeholders, striving for the implementation and maintenance of sustainable and responsible farming practices being balanced with environmental and social responsibility.



7.2 Planning zones

RU2 – Rural Landscape is the principal agricultural land zone in the region

Intensive agriculture is permitted without development consent

Local agriculture zones

For the area covering the Coffs Coast region, the relevant land use classification for blueberry production is horticulture, with horticulture classified as a type of intensive plant agriculture under the local planning schemes.

The Coffs Harbour LGA is the largest and most relevant LGA in the region for blueberry production. Under the Coffs Harbour Local Environment Plan (“LEP”), the principal agricultural land zone is **RU2 – Rural Landscape**.

The objective of the RU2 zone is to support sustainable primary production and intensive agriculture is permitted without development consent. Under this zone, farm buildings are permitted with consent.

The other land use zone where blueberry production is possible is the R5 Large Lot Residential zone. This is a more restrictive zone for blueberry farming, with horticulture permitted only with development consent.

Comparison with other states

Other states with notable commercial blueberry production, albeit to a much lesser extent compared to NSW, is Victoria and Tasmania. The broad zoning applicable to blueberry production for these jurisdictions are summarised as follows.

Victoria

Under Victoria’s planning provisions and local planning schemes, the Farming Zone is intended to facilitate agricultural land use.

Importantly for berry farming in Victoria, regardless of zone or overlay, a planning permit is not required to construct a crop support or protection structure associated with horticulture. The exemption does not apply to structures with a solid roof or wall.

Tasmania

Under the Tasmanian planning scheme, agriculture and controlled environment agriculture, which is relevant for blueberry production, generally fall within Resource Development.

On both Rural Zone and Agriculture Zone land, Resource Development does not require a permit. However, in the Agriculture Zone, the use must be dependent on soil to grow or conducted in a way that does not damage the existing soil profile.

Conclusion

Victoria’s planning provisions explicitly states no permit is required for common horticultural structures, however the exemption does not apply to solid roof/wall structures such as glasshouses or igloos. For Tasmania, controlled environment agriculture expressly includes temporary or permanent built structures and no permit is required, noting the qualification in the Agriculture Zone.

7.3 Local planning provisions for protected cropping

Nets or polytunnels are the most prevalent form of protected cropping

Polytunnels are not considered 'farm buildings' and therefore no development approval is required for use

The expansion of blueberry production in the Coffs Coast region and advancements in sustainable farming has led to an increase in scale and visibility of blueberry production under protected cropping.

The dominant form of protected cropping for blueberry production is netting however there is increased use of polytunnels. These structures are steel framed, elongated, semi-circular structures that have a polyethylene cover and can range from low open-ended structures to more advanced high tunnels and polyhouses where sides can be open or closed. With no concrete base or fixed walls, polytunnels are structures that can easily be dismantled, reassembled and relocated.

Polytunnels are for the purpose of intensive agriculture

A recent court ruling confirmed polytunnels are not considered farm buildings. The ruling handed down by the Land and Environment Court determined the use of polytunnels to be an integral part of berry growing as a form of 'intensive plant agriculture' and not farm buildings, with the structures 'temporary, dismantlable, and part of intensive horticulture'.

The decision clarifies that polytunnels are characterised as part of 'intensive plant agriculture' and not for the separate purpose of farm building under the Coffs Harbour planning scheme. Therefore, the use of polytunnels as a core part of berry production does not require development approval under the Coffs Harbour LEP, unlike the definition of a 'farm building' where development approval is required.



7.4 Right to farm

Planning laws that clearly support horticulture activity involving the use of polytunnels on appropriately zoned agriculture land is important for the continued investment and success of the blueberry industry in the Coffs Coast region

On RU2 land, the planning framework supports blueberry farming as a lawful form of intensive plant agriculture without requiring development consent.

Modern advances in horticulture and blueberry production methods have seen the evolution of protected cropping, which has led to improved yields, the ability to adapt to climate variability and increased sustainability.

As discussed in the previous section, the polytunnel structures used are temporary and reversible, and ultimately the land base will remain viable for future sustainable agricultural use.

The recent decision by the Land and Environment Court also confirmed polytunnels are used for intensive agriculture, not as farm buildings.

Importantly, farming practices involving the use of polytunnels are a legitimate and key use of agriculture land (i.e. right to farm).

The substantial investment by blueberry growers in their operations and communities have been underpinned by the security of being able to undertake horticulture activities on their appropriately zoned land.

For continued investment and for future proofing blueberry farms and the industry, it is essential that state and local planning laws support farming practices involving the use of polytunnels as a legitimate and key use of agriculture land (i.e. right to farm).

There is significant land use conflict in the Nambucca region largely due to historic poor zoning and no

differentiation between land for agriculture and lifestyle uses. Blueberry production is the most valuable agricultural commodity in the region despite only occupying 0.2% of the region's land area. Nambucca's slightly different climate compared to Coffs Harbour enables local growers to access unique, highly lucrative market windows. The industry will work with the Nambucca Regional Council in the development of its recently announced rural land use strategy.



7.5 Seasonal workforce

The blueberry industry makes a valuable contribution to regional employment, but its reliance on hand picking creates sharp seasonal labour peaks. Some businesses transition rapidly from one or two employees to hundreds of workers for a short period of time. These significant fluctuations lead some growers to rely on labour hire companies. While most operators perform an important role, there is increasing concern about unethical labour hire practices in parts of the sector. Berries Australia has therefore repeatedly called on the NSW government to introduce labour hire licensing, noting the success of Queensland's licensing framework.

Larger growers have the capacity to engage workers directly and are often Approved Employers under the Pacific Australia Labour Mobility Scheme. This scheme is highly regulated with significant protections built in for workers, who often earn up to ten times what they can earn in their home countries. An independent survey of workers conducted by the ANU found strong support for the scheme among participants, with 92% saying they would sign up again and 98% saying they would recommend participation in the scheme to a friend.

A major ongoing constraint is the limited availability of suitable accommodation for seasonal workers. With vacancy rates below one percent, growers face significant difficulty finding housing that meets the strict requirements of the PALM scheme. This challenge is compounded by rigid council regulations restricting the development of on-farm accommodation options. There is an opportunity for regional councils to work with the industry to develop appropriate worker accommodation, particularly given the economic boost these seasonal workers make to smaller regional towns.

7.6 Other challenges

Horticulture has long been a key economic activity in the region and it is important that farmers can adopt modern farming practices

Modern production systems help to deliver more sustainable and environmentally sound farming practices

The blueberry industry is subject to a range of regulatory oversight and food safety standards

It is acknowledged the scale and visibility of modern blueberry farming under polytunnels has contributed to other land-use tensions in the Coffs Coast region.

One of the main concerns revolves around the visual impact and changes to desired 'rural landscape character'.

One obvious measure to mitigate some of these tensions is to not allow residential development on neighbouring property or in the vicinity of rural land where agricultural activity occurs on appropriately zoned land.

Extensive horticulture farming has always been a key economic activity in the region and the transition and expansion of blueberry growing has been in place over the past couple of decades. It is important growers can adopt present-day farming methods necessary for successful and sustainable production.

The positive contributions of the blueberry industry to the local economy are significant, from economic output to providing opportunities for people in regional areas to pursue meaningful careers in agriculture and remain in the community. These benefits outweigh the visual impact concerns of legitimate modern day farming methods held by some people in the broader community.

Other challenges facing the local blueberry industry include concerns around chemical use, spray drift and run off.

However, as this report has highlighted, the blueberry industry is leading the transition to protected cropping. Some of the advantages of this modern production system include:

- Shielding crops from pests and diseases, minimising the need for chemical use
- Smarter and more targeted delivery of water and nutrients (i.e. chemicals)
- Acting as a primary mitigation tool for spray drift by creating a physical barrier and reducing wind speed, with Berries Australia estimating spray drift potential can be reduced by 60%-90%.

Furthermore, the blueberry industry is subject to a range of regulatory oversight and food safety standards, including by the Environmental Protection Authority, Natural Resources Access Regulator and the NSW Food Authority. A review of compliance data undertaken by Berries Australia confirms widespread compliance by the blueberry industry with the various regulatory monitoring bodies.

8

Summary



8.1 Conclusion

The Coffs Coast region is Australia's core blueberry production area, transitioning from a largely banana producing region into a high-value and innovation-led horticultural industry. The emergence of the blueberry industry has delivered substantial benefits to the regional economy, while reinforcing the region's identity as a nationally significant centre of agricultural production.

Economic importance

The economic contribution of the blueberry industry to the Coffs Coast is significant. In 2024/25, the industry generated an estimated total gross value of production of **\$590.3 million**, including direct and indirect effects, and contributed an estimated **\$479.6 million** in value added to the regional economy. The industry also supported an estimated **2,785 FTE** jobs across the region and wider economy, with actual workforce numbers rising well above this level during peak harvest. These outcomes demonstrate that blueberry production is a key driver of regional business activity, employment and investment.

Furthermore, the scale of the blueberry industry underpins demand for local suppliers, contractors, transport operators, packaging businesses and technical service providers, creating flow-on benefits across the regional economy. It also supports a broad mix of employment opportunities.

Social benefits

The blueberry industry offers a diverse mix of employment opportunities, which assist in retaining workers and families in the region. The industry is also a significant contributor to the local community through donations, sponsorships, education and charitable initiatives.

Adoption of modern farming methods and the right to farm

A key reason for the industry's success has been the adoption of modern farming methods, particularly protected cropping systems such as polytunnels. These systems are now integral to present-day blueberry production while also improving sustainability outcomes.

For these benefits to continue, it is essential that planning frameworks protect the right to farm on appropriately zoned agricultural land. This will provide the certainty needed for growers to continue investing in productivity, sustainability and local employment.

A professional industry investing in its future

The blueberry industry, through its voluntary levy, is investing in key strategic areas to safeguard its future. The industry has invested millions of dollars into opening new export markets and recently gained access to the lucrative Vietnamese market. Blueberries are the current market access negotiation priority with China and the industry is investing in the required research and development projects to overcome phytosanitary barriers.

As well as the investments managed by Horticulture Innovation, the ABGA has invested directly in supporting an Australian Research Council funded project lead by Monash University looking at Precision Pollination: Data-driven enhancements to boost crop yield. The ABGA has contributed to the development of the \$2.64 million pollination strategy and is a co-funder of the National Bee Pest Surveillance Program. Through Berries Australia the ABGA has also invested in the Pollination Guide for the Australian Berry Industry developed by the Australian Honey Bee Council.