



Gascoyne Food Council Inc

Review of perceptions of Gascoyne produce and strength of the regional brand

In 2009 the Gascoyne Food Council was formed with funding from Royalties for Regions and support from the Carnarvon Growers Association. The aim of the GFC is to identify Carnarvon produce and its systematic promotion as preferable to produce from elsewhere, by boosting consumer recognition of and willingness to pay a premium for Carnarvon produce because of its superior quality.

In September 2009 a study was completed to determine the baseline of knowledge and understanding of the Gascoyne region from the value chain. This study is repeated in 2012 to determine if the substantial efforts of the GFC have been rewarded.

The report highlights some very well defined improvements as well as continued opportunities.

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Direct feedback:

"I think the quality of Carnarvon's produce is improving and the efforts of the Gascoyne Food Council through their Long Table Lunches and other activities are brilliant, so their brand awareness is definitely improving," (John Shannon – Vegies WA).

"I would put the Carnarvon brand up there with Margaret River and you have to keep hammering it home to the chefs, because you have such a great food bowl up there," (Peter Manifis, Incontro).

"I think [the Carnarvon brand] is at the starting point, but there needs to be a lot more work around it and that will come from someone bringing it all together from supplier to the retailer end and promoting it as a brand. It is not where it needs to be yet. The relationship is there, but we need to work out the next steps now. Bananas are the biggest model of success of the whole lot, and prove that it can be done, but the question is how to do it in the other areas? Do we copy that model of consolidated groups? I think we should conduct some trials of this model and if it works, we have our answer," (Mathew Trichet, Coles Fresh Produce State Manager WA).

"If we know what and when the produce is coming out of Carnarvon and we could talk directly to growers, it would change what we do overnight for us and many other restaurants, too. Carnarvon needs driving a lot more," (Scott O'Sullivan, Red Cabbage Food and Wine).

Key messages

- Awareness of the Gascoyne / Carnarvon region's produce has increased in the past three years.
- The Gascoyne Food Council activities and media have created brand awareness for the region's produce.
- There is an increasing trend of consumers wanting to know where their food is produced, and the story behind it. WA consumers want to be able to buy 'local' WA produce.
- All sectors of the supply chain have appreciated the opportunity to participate in GFC promotions and activities, and want to remain engaged and informed.
- Perceptions of quality have largely improved, and efforts to improve supply chain management have been recognised and appreciated by the participants.
- Sweeter Banana Co-operative remains the success story of growers working through their supply chain to improve quality and awareness with consumers.
- Growers and producers of Carnarvon have overcome the significant flood damage in late 2010 with resilience and a high degree of professionalism.
- There is a great deal more opportunity to extend awareness of the Gascoyne brand directly to WA consumers.
- The effort to promote the Gascoyne region's produce needs to be resourced, funded and sustained to build on the good work to date.
- The Gascoyne Food Council's initiatives like its Long Table Lunch, interactive grower/buyer/chef tours, and launch/promotional efforts at the markets are seen as very positive and worthwhile initiatives, and other regions would like to emulate what Carnarvon is doing successfully.

Background

Agknowledge first reported on the market feasibility of establishing a regional brand for the Carnarvon and Gascoyne region in 2009 as part of a broader analysis of supply chain opportunities for the area's produce. Regional branding is designed to enhance market share by creating greater consumer awareness of a region's point of difference.

In 2009 information was obtained from 16 supply chain participants via telephone interviews. The majority of participants felt positive about establishing a regional brand for the Carnarvon area, especially as there was evidence of strong consumer demand to know more about the origin of fresh produce.

The 2009 report identified a number of barriers to brand establishment, the most important of which was the difficulties maintaining consistent volume and quality of supply from the region given the fragmented nature of the Carnarvon grower industry.

The 2009 report also identified a number of opportunities for branding of Carnarvon produce, including candidate products, opportunities for value adding and in particular the ability to exploit Carnarvon produce's superior freshness and flavour, as well as the possibility of leveraging off the Buy West, Eat Best campaign.

With the implementation of The Gascoyne Food Plan 2010-2015, much work has been carried out by the Gascoyne Food Council since the 2009 report. To measure the progress made and opportunities still to be exploited, a further investigation of 16 supply chain participants was commissioned in November 2012.

Each interviewee was asked during primarily telephone interviews about their involvement with the Gascoyne Food Council, their awareness of Carnarvon produce and branding, involvement in supply chain linkages and what they considered to be the barriers and opportunities for regional branding of Carnarvon produce. Their responses are discussed in this report and are compared with the 2009 findings as a measure of progress.

Of the sixteen participants, twelve had previously been interviewed in 2009, with one new representative from Market City, one from an industry group and two new restaurateurs being added. The full list of participants is summarised below.

Wholesalers

- Paul Neale, Mercer Mooney
- Ben Tanner, Fresh Exchange
- Chris Langley, Quality Produce International
- Rick Conti, Key Produce

Market City

- Norm Carroll, Carroll Services
- Basil Gotsis, PMA Marketing Operations Committee

Industry

- Noelene Swain, Fresh Finesse
- John Shannon, Vegies WA

Retailers

- Mathew Trichet, State Manager Coles Fresh Produce
- Mark DeGraff, IGA Fresh State Fresh Produce Buyer
- Michael Pember, Boatshed owner
- Michelle Clapper, Herdsman Fresh
- Tom, Fresh Provisions

Restaurateurs

- Peter Manifis, Incontro
- Kate Lamont, Lamont's Restaurants
- Scott O'Sullivan, Red Cabbage Food and Wine

Report on discussions across the supply chain

Analysis by sector:

This section discusses the major findings of the five groups of supply chain participants outlined above and compares these findings to the 2009 outcomes. A summary of the participants' responses to the barriers and opportunities for regional branding for the Gascoyne can be found in Table 1. Detailed accounts of the interviews are attached as Appendix A.

Wholesalers

Of the four wholesalers interviewed, two had direct and positive engagement with the GFC through attendance at launches or partnership in marketing strategies. The other two were aware of the GFC, but had only indirect involvement. Three of the four wholesalers felt they had become substantially more aware of Carnarvon produce in the past three years, with one of these stating that "Carnarvon has done a really good job of raising their profile over the last three years," (Chris Langley). These same three wholesalers also felt they had established far better linkages through the supply chain over this time period and that Carnarvon had reasonable brand recognition, but that much more could be done to improve this branding.

It is interesting that the fourth wholesaler interviewed felt that despite attending the GFC Canningvale launch and a greater awareness of the GFC, his awareness of and linkages with Carnarvon produce were the same as they had been for the last 20 years. In 2009, this wholesaler expressed his desire to see Carnarvon producers engaging more pro-actively in the marketing of their product by visiting Canningvale. He was consequently very positive this year in his comments about the GFC's producer visits and launch at Canningvale, however this wholesaler also felt Carnarvon was still a generic brand and believes there are continuing quality and supply problems facing the region.

Wholesalers commonly felt Carnarvon's ability to unite producers to provide consistency in quality and supply were the primary barriers to regional branding, which was consistent with the findings of the 2009 report.

Wholesalers were all positive in their perceptions of the opportunities available to the industry, including premium positioning and value-adding. These opportunities are detailed on the table below.

The Sweeter Banana Co-operative was still seen by all as an excellent example of a well differentiated product by all.

Wholesalers generally felt there was continued strong consumer demand to know about the origin of fresh produce, although one felt that value was more important now than in 2009, due to the economic downturn.

Market City Representatives

The two interviewed representatives of Market City were experienced individuals whose extensive feedback provided an interesting contrast. Only one had previously been interviewed in 2009.

One representative had had little involvement with the GFC other than receiving their e-mail update and picking up a flier at the markets. He would welcome greater involvement and felt he could contribute to the GFC's market knowledge. The other representative, by contrast, has attended many GFC functions, and whilst positive about these events, felt there should be a greater effort aimed at consumers (such as chefs) rather than industry players.

Both representatives felt their extensive knowledge of the industry meant there was no change in their awareness of Carnarvon produce in the past three years. They were already fully aware of what was produced and when and by whom and this had not changed since 2009.

One representative felt that greater use of technology had recently created better supply chain linkages, as seen by the use of digital photography and e-mail to immediately communicate supply and quality information.

Both felt that Carnarvon now had brand recognition, as evidenced by "they have certainly created an identity for themselves, which is a good thing," (Norm Carroll, 2012). This was a positive change since this representative's 2009 interview, where he repeatedly claimed that there was a need for greater branding that was unmet. "The grower group will need...to get the brand name out there and recognised," (Norm Carroll, 2009). However, one representative felt that the use of the term "Gascoyne" was problematic because there

was poor public awareness of the locality of that term. The other representative noted that brand recognition “depends on the dollars and cents – if you have lots of funding you can do what you want to promote your area,” (Norm Carroll, 2012).

In 2009 the major barrier to brand development was seen by Market City representatives as being producers’ ability to supply sufficient quantity of high quality produce. In particular there was the need for “all growers to have the same quality standards,” (Norm Carroll, 2009). As with other responses in 2009, this representative felt that the fragmentation of Carnarvon’s grower group worked against its ability to supply good quality produce, and that “it will be very challenging to get the various groups working cohesively,” (Norm Carroll, 2009). This year, there is some evidence that these issues are being overcome. “Properties are amalgamating and that is a benefit because the industry becomes more professional and more cost efficient per acre,” (Basil Gotsis, 2012). Volume of supply was seen as a limitation, as well as lack of public recognition of the location of the name “Gascoyne”.

The opportunities for Carnarvon’s produce put forward by market representatives in 2009 related primarily to individual lines (of red grapefruit and sweet corn) and the need in general for greater branding. This year, market representatives suggested a far broader range of lines would be appropriate for branding, one highlighting the need to leverage off existing festivals or events both within Australia and Internationally. They also provided many specific suggestions to improve branding, including the use of social media and concentrating on the story behind Carnarvon’s produce. These comments are outlined on the table below.

Both representatives felt origin of product has increasing importance in the minds of consumers and that the Sweeter Banana Co-operative continued to be an excellent example of a well differentiated product.

Retailers

Five retailers were interviewed in 2012 and all had some awareness of the GFC, two received regular contact and one would welcome more regular updates via electronic media.

Two of the five interviewed retailers felt their awareness of Carnarvon produce had increased over the past 3 years, and in two cases this was linked to the efforts of the GFC to improve supply chain linkages through grower visits.

In 2009 there was strong demand for Carnarvon to develop regional branding from most of the retailers. This year, retailers felt Carnarvon produce had reasonable brand recognition, with that brand standing for “local” produce. There was some evidence of increasing brand awareness, as shown by the comment “we also recognise that papaya is from [Carnarvon], but not so much on the veg side. Mangoes and stone fruits and grapes are starting to come through on the branding,” (Michael Pember, 2012). However, there is still a lot more work to be done as shown in the comment “I think it is at the starting point, but there needs to be a lot more work around it and that will come from someone bringing it all together from supplier to the retailer end and promoting it as a brand. It is not where it needs to be yet,” (Mathew Trichet, 2012).

Retailers were not as forthcoming with barriers to regional branding, other than one stating that grower’s use of technology is a limiting factor, as well as two repeating the call from 2009 to improve consistency of quality and supply. In 2009, quality and supply issues featured more heavily than this year.

Opportunities are outlined in Table 1 and these centred on a strong need for greater marketing and profile raising amongst consumers. Papaya, mangoes, bananas and strawberries were seen as appropriate products to brand. All felt food origin was increasingly important and that the Sweeter Banana Co-operative continues to be a well differentiated brand.

Industry

Two representatives of Industry groups were interviewed this year, and one of these had also been interviewed in 2009. Industry members were very positive about their high level of engagement with the Gascoyne Food Council and held very complimentary views of the work done by this group. They felt the work of the GFC had directly resulted in a greater level of awareness, that there was evidence of increasing supply chain linkages and brand recognition and that previously described barriers to brand development such as poor quality of supply were being overcome.

For example, in 2009, one representative held grave concerns over the quality of Carnarvon produce and stated “Carnarvon growers have a somewhat tarnished reputation and for them to develop a brand, I think they will need to start right at ground level,” (Noelene Swain, 2009). This same interviewee this year stated “It was fabulous to see how the industries have developed and grown,” (Noelene Swain, 2012). Further, the other industry representative stated “I think the quality of Carnarvon’s produce is improving, and the efforts of

the GFC through their Long Table Lunches and other activities are brilliant, so Carnarvon’s brand awareness is definitely improving,” (John Shannon, 2012).

The major barriers to regional branding were now felt to be securing ongoing funding for the GFC, as well as a repetition of the 2009 call for the need to overcome the fragmentation of the Carnarvon grower group. The opportunities for Carnarvon’s produce are outlined in Table 1.

Both representatives felt consumer awareness of the origin of fresh produce continued to be of importance to consumers, and both were highly complementary of the Sweeter Banana Co-operative’s brand and market development as evidenced by the following statements:

- “Those guys are geniuses,” (John Shannon, 2012).
- “They are doing a superb job. They are staying true in their direction of where they are heading. They are approaching it systematically and professionally and doing an excellent job,” (Noelene Swain, 2012).

Restaurateurs

Three restaurateurs were interviewed in 2012 and only one of these had been previously interviewed. One of the respondents had significant involvement with the GFC and this was seen as extremely positive. Another had no knowledge of the group other than what he had read in the West Australian newspaper, and had little knowledge of Carnarvon’s produce. He expressed surprise when informed that the winter vegetables he sources through Market City would most likely be from Carnarvon.

The restaurateur who had been previously interviewed continued to hold similar views to those expressed in 2009. There had been no further engagement of this individual by GFC, they still did not perceive Carnarvon as having a regional brand, and they continued to express a reticence as to the value of branding of Carnarvon produce.

Overall, the restaurateurs represent a huge opportunity for Carnarvon produce, as evidenced by comments such as “if we know what and when the produce is coming out of Carnarvon and could talk directly to growers, it [our purchasing patterns and branding] would change overnight for us and many other restaurants, too,” (Scott O’Sullivan, 2012). This is a more positive outlook than in 2009 when, in the small sample taken, the hesitancy as to the value of branding was perhaps over represented. It would now seem that those restaurateurs who are aware of the region’s produce are thirsty for more, seeing the local branding as a point of difference for their own business. Those that are not aware want to be on-board, as soon as possible. A lack of extension and the ability to supply direct seems to be the only barriers to a massive opportunity, with owners of Perth’s top restaurants willing to go the extra mile to secure fresh, local produce. “If I knew I could get something direct, I would drive to where I have to pick it up,” (Peter Manifis, 2012).

Two out of three restaurateurs felt there was strong consumer demand for knowledge of produce origin.

Table 1: Opportunities and barriers to regional branding for the Gascoyne

Opportunities for establishing a brand	Barriers to establishing a brand
<p>Wholesalers:</p> <ul style="list-style-type: none"> • Premium positioning and segmentation by value adding or using pre-packing opportunities. • They need to work more closely to establish a joint vision and follow it more closely. • Anything grown in fresh produce. Any [market] where there are imported products, it is important for customers to know the product is local. For example, citrus is good. Anything where freshness is important. If fresh product is grown in Carnarvon, it is already three days fresher than if it is from Bundaberg. • Bright future – they have a real benefit in the discount on freight so if the focus remains on quality they have a huge advantage. • With the exception of Sweeter Banana they could do a lot more to improve the brand awareness in the public. 	<p>Wholesalers:</p> <ul style="list-style-type: none"> • Consistent quality and availability are the major barriers. • Fragmentation of the grower group. • The two main problems facing Australian producers are that costs of production are increasing and yields are dropping. Growers in Australia need to look at new varieties and increase yields. • They can only pack the best quality of what they have, so if they don’t have much, they won’t pack to as high a standard. They need to pack to a standard, not as a product of yield.

<p>Market City</p> <ul style="list-style-type: none"> • They need to brand their location more and use more stories. Consumers want to know about the relationship between the land, grower and consumer. Carnarvon needs to make more mileage out of the fact that Carnarvon produce tastes better because it has to struggle to grow with less water. It has a higher sugar content in the bananas, for example, because of this. • Carnarvon is in a unique position because it supplies winter vegetables when the rest of Australia's market is not strong (i.e. other producers cannot supply due to seasonal conditions). • Carnarvon growers are extremely water wise, which is politically acceptable, so they should make more use of that on their PR. Carnarvon producers' water use per tonne of produce is better than anywhere in the rest of Australia, so that should be a marketing point. • They also should have a think tank to look at what other products could be promoted. What is sexy and could garner media attention? I would look internationally for examples and markets, as Australia is seen as a clean producer and see how it relates to our produce. <p>Retailers</p> <ul style="list-style-type: none"> • The producers need to supply more merchandising to the retailers. • I would welcome feed-back and more communication from other local brands anytime. That is what we are all about – promoting local produce. Ryan Pack would be the person to talk to regarding this. • They don't brand their veg at all it seems and consumers would not be negative to that. • People like to buy local and if the GFC can convince consumers that Carnarvon is local, then it would be an advantage. • They need to do more marketing. For example, we deal with Calypso mangoes from up north. Their promotional material and drive is fantastic. We need to do more of that for Carnarvon. The mango growers give a small amount to drive the promotion and this is used to create stickers, posters and recipe cards. The Calypso campaign definitely works – the consumers definitely buy more mangoes because of it and it is really successful. Carnarvon needs to do more of this sort of thing. • There are opportunities there through the whole chain, from grower base (to become more consistent) to someone such as GFC bringing it all together to deliver to the retailer a brand they might be interested in. Obviously Coles would be interested in being a part of that. <p>Industry</p> <ul style="list-style-type: none"> • It is seasonal opportunity to create a strength of presence in the winter months. Consumers are not truly aware of where their fruit and vegetables are coming from in the winter months. • Brands work particularly well with quality control, so use quality control as a way of leveraging the Carnarvon brand. I think there is more chance that mangoes and bananas will go better in Perth consumer's mind, because in their mind, tropical fruits come from up North places such as Carnarvon, so they would lend themselves to that. The main vegetable produced from Carnarvon is tomatoes, but we have Australia's largest 	<p>Market City</p> <ul style="list-style-type: none"> • The volume of any one product produced. • Public brand awareness. • They need a brand name that has greater awareness in the public in regards to locality. As it is, the Gascoyne needs a catch cry linked to it such as "from the sunshine north". <p>Retailers</p> <ul style="list-style-type: none"> • Technology needs to be upgraded. • Consistency of supply and especially of quality can be a problem across the board. • Consistency of supply and quality. There are a lot of different growers and you need to bring them together to build a brand for a product that the customer will trust. • You can build a brand, but if it is not consistently good quality, the brand will be watered down and it will not have traction with the customer. <p>Industry</p> <ul style="list-style-type: none"> • The age old challenge of unity versus fragmentation of individuals within the sector. • No barriers other than what funds they have to roll it out. What they are doing is sensational. Highly successful.
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<p>tomato grower here in Perth. So while it is a main line from Carnarvon, it is not identified with tropical production and may not fit so well with consumer's perceptions.</p> <ul style="list-style-type: none"> I think there is a huge opportunity to increase consumer's awareness of the region and to make sure people buy locally. The best way of doing this would be through the retailers using in-store promotions and demonstrations. They need to exaggerate the origin of their produce. <p>Restaurateurs</p> <ul style="list-style-type: none"> If we can be updated on what is available when, most top end restaurants would prefer to source regional produce. The top 50 restaurants in Perth would want to do that. It gives us a point of difference and the branding gives us an advantage – close regional product gives us something to talk about to our customers. If I knew something was available from Carnarvon I would love to source it. More could be done to increase the awareness of Perth chefs about using seconds. If I knew I could get something direct, I would drive to where I have to pick it up. I would put the Carnarvon brand up there with Margaret River and you have to keep hammering it home to the chefs because you have such a great food bowl up there. I would say the produce is better than Margaret River's. 	<p>Restaurateurs</p> <ul style="list-style-type: none"> The lack of extension. Supply – we have to buy it through someone, but knowing where to go to get Carnarvon produce is the problem. Cluttered marketplace already and different markets have different levels of understanding [of the product].
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Overall Analysis:

Thirteen of the sixteen interviewed supply chain participants were aware of the Gascoyne Food Council through either direct or indirect contact. This demonstrates strong evidence that the GFC has a profile amongst, and is engaging with, supply chain participants. However, there is an obvious need to continue the efforts in this area, as several respondents requested greater communication from the GFC. The groups least aware of the GFC included the wholesalers and restaurateurs, although in some of the former cases it was acknowledged that managers above the respondents may have been invited to attend functions and therefore be more exposed to the GFC.

Participants' awareness of the GFC was not assessed in 2009, but there is anecdotal evidence that they have become more aware of the GFC in the past three years, primarily due to events such as the Long Table Lunch and the use of newsletter updates.

- "We think the long table lunch was really effective and Vegies WA is looking to emulate that on a state-wide basis. The most effective aspect was using chefs with a well-known name to highlight local produce and engage the media," (John Shannon, Vegies WA).

Nine of the sixteen participants had become more involved with or aware of Carnarvon produce in the past three years. This was directly stated to be due to the actions of the GFC in two cases. Five respondents stated they felt they had the same level of awareness of Carnarvon's horticultural produce as previously, and in most cases this is because they were already fully aware of all the area had to offer.

- "I have been aware of Carnarvon's produce for the last 20 years," (Rick Conti, 2012).
- "It is our job to know what is happening in the industry, so I don't think there has been any change in our awareness. We are fully aware," (John Shannon, Vegies WA).

Similarly, there was evidence of an increase in improved supply chain linkages, with nine out of the sixteen participants stating they had developed closer ties with producers. This was directly attributed to the actions of the GFC in two cases. Of the four respondents who felt these linkages had not been made, three were restaurateurs and two of these specifically expressed the wish for greater access to suppliers.

- "The grower visit made us more aware of who was doing what and opened up channels of communication. It let the growers know we are approachable and interested in growing the industry, rather than the opposite view that is commonly expressed in the media," (Mathew Trichet, 2012)

- “If I knew I could get something direct, I would drive to where I have to pick it up,” (Peter Manifis, 2012)
- “If we can be updated on what is available when, most top end restaurants would prefer to source regional produce. The top 50 restaurants in Perth would want to do that,” (Scott O’Sullivan, 2012).

Thirteen out of sixteen respondents recognised Carnarvon as having a regional brand, and many of these thought this brand stood for “local produce”. Of the three respondents who did not recognise Carnarvon as having a regional brand, two were restaurateurs. This is a significant improvement in three years, given that in the last report, supply chain participants were only speculating on the existence of such a brand. The success of events such as the Long Table Lunch in highlighting Carnarvon branding was underlined by the finding that industry groups and the restaurateur who had been exposed to these events had a high level of awareness and hugely positive perceptions of both Carnarvon’s produce and the GFC. Those participants who have not, generally had lower levels of awareness. The exception to this was those people who have been in the industry all of their careers.

- “The efforts of the GFC through their Long Table Lunches etc. are brilliant, so Carnarvon’s brand awareness is definitely improving,” (John Shannon, Vegies WA).

While progress has evidently been made, there is still much work to be done to cement Carnarvon’s brand, as evidenced by Mathew Trichet’s comments at the beginning of this report. Two respondents linked future development to the GFC’s ability to secure sufficient funding.

- “It depends on the dollars and cents – if you have lots of funding you can do what you want to promote your area. They have certainly created an identity for themselves, which is a good thing,” (Norm Carroll).
- “[There are no barriers], other than what funds they have to roll it out. What they are doing is sensational. Highly successful,” (John Shannon, 2012).

As outlined in Table 1 almost all participants were positive about the opportunities for regional branding of Carnarvon’s produce. Most suggestions centred on the continued need for a coordinated approach including all supply chain participants from growers through to retailers and customers. This coordination should focus on the clear demand for greater extension of information, including a greater use of technology and electronic media to streamline supply chains. Many of the same opportunities as were expressed in 2009 were repeated, such as the need to exploit Carnarvon produce’s “fresh, local” image and the potential for value adding.

It was also notable that several suggested opportunities in the 2009 report had been acted upon. For example, grower visits had taken place since the 2009 study, with hugely beneficial results in the opinions of two retailers. These visits created opportunities for greater understanding between all parties and “gave the growers good visibility of other parts of the supply chain,” (Mathew Trichet, 2012). Mercer Mooney had engaged in a direct co-operative promotion for value adding to Carnarvon tomatoes, which “sold nearly 100,000 punnets in a 4 week period, which was highly successful,” (Paul Neale, 2012).

Suggested opportunities also reflected that the Gascoyne brand needs to move onto the next step compared to 2009, and promote the brand to the public more than industry.

- “Everyone (within the industry) knows most winter vegetables come from Carnarvon. I suppose the industry knows, but not so much the public,” (Norm Carroll, 2012).

The barriers to regional branding are also outlined in Table 1. Quality and supply issues featured heavily in 2009 and again in 2012. However, it is encouraging to note that there is some evidence that progress is being made. For example, the Coles representative noted a “massive” improvement in quality and supply of Carnarvon bananas. And an industry representative noted:

- “Historically Carnarvon has a reputation for lower quality produce, but that is changing. This is due to some of the work the GFC is doing, as well as the Sweeter Banana Co-operative. The agronomy is also improving, so they are getting a better quality product,” (John Shannon, 2012)

Another barrier common to 2009 and this year’s wholesalers and retailers is the number of small producers in the Carnarvon area and the difficulty in getting them to unite to produce consistent lines. While respondents held up the banana industry as an example of how this barrier has been overcome, there is the danger that this fragmentation may be exploited as part of a market strategy of the major wholesalers.

- “I think the region will continue to be relatively fragmented, but we understand our strategy better. I think we can leverage that fragmentation better in the future. I am reluctant to explain that further because our strategy is a key part of competitive advantage,” (Paul Neale, 2012).

The most commonly identified products suited to regional branding identified by respondents this year were bananas (nine responses), mangoes (three) and tomatoes (three). Four respondents felt any fresh produce from Carnarvon would be suitable and a wide range of other candidate products were mentioned, including papaya, grapes, strawberries, capsicum, cucumber, chilli and seafood. The candidate products mentioned in both the 2009 report and this year included grapes, bananas, mangoes and papayas.

The overwhelming majority of respondents this year readily identified Carnarvon bananas, and in particular the Sweeter Banana Co-operative, as a good example of a well differentiated product. While participants in 2009 were similarly positive in their assessment of this company's achievements, this year many participants went further, due to the maturity of this company's marketing strategy now in evidence. In particular, one representative of a major grocery outlet recognised the significant gains made by this company in quality and supply issues and this was felt to be directly related to far closer supply chain linkages. The Sweeter Banana Co-operative was held up by several respondents as the model upon which other Carnarvon growers should base their business and brand development.

- "We have a direct relationship with them [Sweeter] now, so that we have really good visibility into their production. We share resources to help them improve their processes and quality and we get an immediate benefit from that. We have made massive inroads in consistency of supply and volume, quality and shelf life. There are still more opportunities. Sweeter Bananas are a really good example of what "good" looks like for branding," (Mathew Trichet, 2012).
- "Carnarvon has lots of smaller growers, so it is difficult to unite them, but they need to follow Sweeter's example. There is no down side to the producers. They have overcome supply problems so there are no barriers now. Sweeter now have a marketing liaison guy so they market more appropriately and there is more communication now to co-ordinate with suppliers and marketers. This is hugely beneficial because it irons out peaks and troughs of the growing season with clever marketing," (Chris Langley, 2012).
- "Those guys are geniuses. People now associate better quality with that brand, despite the aesthetics. People know that Carnarvon bananas are a better quality product, even though the product is smaller and lasts a shorter time. Their whole production system is brilliant – they use far less labour than the producers on the East coast and yet produce a superior quality product. It is an example for the rest of the industry," (John Shannon, 2012).

The final question asked of supply chain participants was about their perceptions of consumer demand regarding the origin of fresh produce. In 2009, this demand was seen as strong. This year, eleven of the sixteen respondents to this question felt there was very strong demand. Several felt there had been no change, but that origin was still very important to consumers. One restaurateur was unsure and one wholesaler felt the demand had decreased due to the economic climate.

- There is still strong demand. The customer wants to know about the origin of their food and we are trying to find better ways to spell it out, whether through the "Buy West, Eat Best" campaign or our own packaging. Everyone has that challenge and they are all looking at ways to call out regional produce in store," (Mathew Trichet, 2012)

Conclusion

In 2009 it was evident that there was significant potential for regional brand development of Carnarvon's horticultural produce, but that the barriers of quality and supply needed to be overcome before this potential could be realised.

There is evidence in 2012 that many of these barriers are being overcome, that the Gascoyne Food Council has been effective in raising the profile of both their organisation and of the regional brand. Further, there is evidence that suggestions made in the 2009 study have been put into place with the result of improving supply chain linkages. However, there is still much to be done to capitalise on the gains so far and to take the Gascoyne brand to the level of sophistication and coordination that other brands such as "Harvey" currently hold in the consumer's mind. The findings of this report indicate that the following points need to be achieved:

- Continued efforts to unite the region's producers under a quality standard.
- Moving the focus of brand recognition promotion from supply chain members to the wider public.
- Working harder to utilise technology to enhance communication chains.
- Secure future funding to sustain the regional branding effort.

The securing of future funding is vital to capitalise on the good work done so far and to take the Gascoyne regional brand to the next level, and this report has demonstrated there is a clear desire from supply chain participants for the work of the GFC to continue into the future.