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# Priorities and Strategies for R,D&E of the Australian Truffle Industry 2014 to 2019



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**Rural Industries Research and  
Development Corporation**

# **Priorities and Strategies for R,D&E of the Australian Truffle Industry 2014 to 2019**

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# Foreword

RIRDC has been involved in the research, development and extension of the Australian truffle industry for the past two decades.

This report outlines the R&D priorities and strategies over the next five years for truffles. It builds on the outcomes of a series of stakeholder meetings and a variety of inputs from industry participants. Commencing with the industry's national conference and AGM in August 2013, over the past few months, R&D priorities have been sought, and prioritised with the industry's stakeholders.

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

This report is an addition to RIRDC's diverse range of over 2000 research publications.

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

**Craig Burns**

Managing Director

Rural Industries Research and Development Corporation

# Snapshot of Truffle RD&E Priorities and Strategies 2014-19

## Vision

A productive, sustainable, growing and cohesive truffle industry supplying product of the highest quality that is strongly sought-after by discerning consumers around the world.

## Research, Development and Extension Mission

To provide research, development and extension in support of the strategic priorities, so as to lay the platform on which the Australian Truffle industry will grow and prosper by providing RD&E in support of the industry's major focus points:

- **Quality:** in the product, farm practices and management, certification and quality of inoculated trees, domestic and international freight systems, and communicating the quality message to growers, consumers and other stakeholders
- **Markets:** in gaining better understanding of both domestic and export markets, capacities, consumer attitudes and preferences, and competitive issues
- **Productivity:** Delivering continuous improvement to the industry's production systems
- **Capacity building and Communication:** in improving communication with industry stakeholders, consumers and the wider community, to provide robust and credible data about the industry status, and build R&D capacity through strong relationships with RIRDC, Government, researchers and their institutions.

## Objectives

Areas of focus for research and development in support of this mission are as follows (please note that, within each section, areas are listed in order of priority):

- **Quality and standards assurance:** Maintaining and enhancing quality in the product, and in production systems. This includes such topics as:
  - maintaining grading standards and educating growers and the market in those standards
  - continuing development of the Association's tree certification scheme
  - developing an industry biosecurity plan
  - developing an awareness of provenance of inoculated trees and truffle products
  - investigating the feasibility of developing an 'Australian' brand underpinned by quality standards and education.
- **Market access and understanding:** Improving industry understanding of markets, both domestic and international, to accommodate increasing production, by:
  - improving industry understanding of market strategies most suited for securing the Australian market

- developing an increased understanding of distribution issues for international markets, capacity of those markets, and identifying and quantifying potential new markets.
- **Productivity:** delivering constant improvement to the industry's production systems focussing on areas of greatest threat as well as those of greatest promise to the industry including:
  - identifying major threats
  - improving the science and understanding of production and optimising management
  - educating growers about optimising production and management.
- **Communication and Capacity Building:** Ensuring that the industry has the capacity to maintain and improve communication among members and the broader Australian truffle industry, the Australian scientific community, and international truffle networks, by:
  - maintaining support for an ongoing truffle research within Australian universities and other research institutions
  - a continuously improving communication system (including a redefined website) to better communicate R&D outcomes and deliver science-based information/solutions to industry participants
  - continuing the annual conference as a major means of communication with members, the scientific community, and engagement with the international community
  - maintaining strong and focussed links with relevant government bodies.

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# 1. Introduction

The Australian truffle industry has had a number of strategic R&D plans since its establishment.

The previous plan was a three year document that covered 2009 to 2011 (*Truffle Industry: R&D Strategic Plan 2009–2011*, RIRDC Publication No. 09/093)

In line with RIRDC's life-cycle-based strategy for developing industries, this new priorities and strategies document has been constructed to span five years from 2014 to 2019.

## **Derivation of R&D strategies and priorities**

TITDC has engaged with The Australian Truffle Growers Association, Incorporated, (ATGA) to develop this report.

The report reflects feedback from the annual ATGA Conference. The priorities and strategies were then further developed at a workshop with industry in October 2013 (involving both members of the ATGA and other industry participants).

## 2. Alignment with National Research Priorities and Rural Research Priorities

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

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

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

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

<b>National Research Priorities</b>	<b>Aligning Truffle “R&amp;D Priorities and Strategies” objectives (from Table 6.1)</b>
<i>An environmentally sustainable Australia</i>	1.1, 1.3, 1.5, 3.1,3.2
<i>Promoting and maintaining good health</i>	1.1, 1.3, 1.5, 2.1, 2.2, 3.1 3.2, 4.1 - 4.4
<i>Frontier technologies for building and transforming Australian industries</i>	1.1 – 1.5, 2.1, 3.1-3.2, 4.1 - 4.4
<i>Safeguarding Australia.</i>	1.1-1.4, 2.1, 2.2, 3.1, 3.2, 4.1 - 4.4

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

<b>Rural Research Priorities</b>	<b>Aligning Truffle Industry “R&amp;D Priorities and Strategies” objectives (from Table 6.1)</b>
<i>sustainable natural resource management</i>	1.2-1.5,3.1, 3.2, 4.1 - 4.4
<i>improving competitiveness through a whole-of-industry approach that emphasises efficient and effective supply chain management;</i>	1.1 - 1.5, 2.1, 2.2, 3.1, 3.2, 4.1 – 4.4
<i>maintaining confidence in the integrity of Australia’s food, fish and forestry products</i>	1.1 - 1.5, 2.1, 3.1, 3.2, 4.1 - 4.4
<i>improving trade and market access</i>	1.1 – 1.5, 2.1, 2.2,
<i>making use of ‘frontier’ technologies</i>	1.1 – 1.5, 2.1, 3.1 - 3.2, 4.1 - 4.4
<i>protecting Australia from invasive diseases and pests</i>	1.1 – 1.5, 2.2, 3.1 - 3.2, 4.1 - 4.4
<i>creating a culture of innovation, largely by investing in the sector’s most important asset – its people</i>	1.1 – 1.5, 2.1, 3.1 - 3.2, 4.1 - 4.4

### 3. Alignment with RIRDC R&D objectives

The RIRDC Corporate Plan 2012-17 has the aim of enhancing prosperity for the Corporation’s current and future portfolio industries and the wider rural sector.

The Corporate Plan 2012-2017 the Rural Industries R&D Corporation has three goals, (outlined below), all of which are strongly supported by this Truffle Industry RD&E strategy:

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

In the derivation of the 2014-19 Truffle Industry R&D Priorities and Strategies document, the objectives have been aligned with the RIRDC R&D objectives in the following way:

<b>RIRDC R&amp;D objectives</b>	<b>Aligning Truffle Industry “R&amp;D Priorities and Strategies” objectives (from Table 6.1)</b>
<i>Promote leadership and innovation in the rural sector</i>	1.1-1.5, 2.1, 2.2, 3.1 - 3.2, 4.1 - 4.4
<i>Increase profit and productivity in rural industries</i>	1.1-1.4, 2.1, 2.2, 3.1, 3.2, 4.1 - 4.4
<i>Enhance sustainability across the rural sector</i>	1.2-1.5,3.1, 3.2, 4.1 - 4.4

The soon to be released New and Developing Plant Industries Strategy will also provide guidance from 2014-2019.

## 4. Industry Context and Commitment

There are a number of issues on the horizon that threaten the industry's future economic well-being:

- Looming competition from countries like South Africa, Chile and Argentina threatens to flood the world market in the next few years, significantly affecting world prices for all producers in the southern hemisphere.
- To be able to compete with truffles from these countries that enjoy much lower input costs in terms of labour, water and land, the Australian industry will need to have established its credentials as the go-to country in this part of the world for high and consistent-quality truffles.
- The Australian industry will also need to have built strong relationships and be well established in potential new markets before these competing countries come on line. In this respect, time is of the essence for the industry to obtain good market research/information for future markets, for example in China, SE Asia and the Middle East.
- Issues of truffle rot, truffière decline and inconsistent inoculation and establishment also threaten to lower the overall quantity and, potentially, the quality of truffles produced by the industry and lead to an even more fragmented approach to export marketing.

In the face of these pressing issues, the industry has renewed its efforts to pursue RD&E to find the answers to these challenges.

## 5. Research Directions

Table 5.1 lists current projects and those completed over the past five years. For completed and published projects, publications are available for free download from the RIRDC website [www.rirdc.gov.au](http://www.rirdc.gov.au). For incomplete or unpublished projects, researchers may be able to obtain additional information from RIRDC.

**Table 5.1 RIRDC-funded truffle research over the past 5 years**

Current Projects:

ID	Project	Start	Finish
PRJ-005070	Development of a nano-sensor for volatile analysis of Australian Black Truffles	1/06/2010	30/01/2014
PRJ-009100	Truffle R&D Priorities and Strategies 2014-2019 – Consultation workshop and plan	31/10/2013	20/12/2013

Projects completed over the past 5 years

ID	Project	Start	Finish
PRJ-002643	Truffle industry stocktake	7/01/2008	30/04/2008
PRJ-003974	Investigation of factors to improve black truffle yield	30/05/2009	30/04/2013
PRJ-004627	Truffle Industry 2009/2010 Communication and Education Program	10/06/2009	30/10/2009
PRJ-005586	Formation of a Collective Marketing Organisation for the Aust truffle industry	19/03/2010	31/05/2010
PRJ-005720	Australian Truffle Industry Development 2010-11	15/06/2010	30/04/2011
PRJ-007336	Obtaining samples for inoculation data on truffles	18/04/2011	30/08/2011
PRJ-003686	Identify the agent causing rot in tuber melanosporum and management controls	26/06/2009	29/06/2011
PRJ-006141	Identify the agent causing rot in tuber melanosporum and management controls	26/06/2011	30/05/2013

Conference, workshop and and travel funding:

ID	Project	Start	Finish
PRJ-000846	The New Zealand Truffle Association AGM	20/05/2007	26/04/2008
PRJ-000847	WA Truffle Festival Mundaring WA	15/05/2007	19/03/2008
PRJ-002737	Oregon Truffle Conference Industry Research	15/01/2008	27/02/2008
PRJ-003137	New Zealand Truffle Association Conference 2008	13/06/2008	18/11/2008
PRJ-003173	Future directions for the Australian truffle industry: Conference sponsorship	11/06/2008	16/11/2008
PRJ-003174	Truffle Industry of Australia AGM, Melbourne: Travel Award	11/06/2008	16/11/2008
PRJ-003258	Australian Truffle Growers Association AGM	27/07/2008	22/12/2008
PRJ-006879	Australian Truffle Growers Booth at NRIA Conference Nov. 2010	25/11/2010	7/01/2011
PRJ-007361	Truffle Growers AGM Conference and activities	25/06/2011	15/05/2012
PRJ-008449	2012 Truffle Growers Extension Conference and R&D updates	1/06/2012	1/06/2013

## **6. RD&E Objectives, Strategies and Key Performance Indicators**

RIRDC will engage with the industry to provide RD&E in support of four strategic RD&E priority areas, in order to improve the industry's international competitiveness and provide a platform on which the Australian Truffle industry will grow and prosper.

**Table 6.1 Sub-program strategic priorities, objectives and performance indicators**

1. <b>Quality Standards:</b> To undertake RD&E that will improve quality standards across the industry's operations from production to supply systems.						
	Objective	R&D Strategy			Key Performance Indicators	Current ranking
1.1	Ongoing provision of workshops towards the standardisation of quality/grading throughout the industry. Execution = ongoing	1.1.1	Ongoing grading workshops	High	Workshops continued and instigated as required – at least once per year at annual conference.	Ranking 2014: High 2015: 2016: 2017: 2018: 2019:
1.2	Continuing the delivery and continuous improvement of the inoculated-tree certification scheme. Execution = ongoing (Industry expect this to be self funding)	1.2.1	Full implementation of scheme	High	Scheme available through at least three major nurseries by 2014 planting season.  Scheme self-funding by 2015.	Ranking 2014: High 2015: 2016: 2017: 2018: 2019:
		1.2.2	Ongoing management and QA monitoring of scheme	High		
1.3	Providing solid scientific advice to secure the industry's biosecurity (both on entry and exit) Execution = ongoing	1.3.1	PHA Biosecurity Plan and PHA membership	Very High	Completion of PHA Biosecurity Plan for the industry (including PHA membership and on-farm biosecurity planning workshop) completed by	Ranking 2014: Very High 2015: 2016: 2017: 2018: 2019:

				2015.		
<b>1.4</b>	Research into a system of provenance testing for marketed truffle Execution = 2014-2015	1.4.1	Completion of Australian geographic provenance research	Low/Medium	Provenance mapping completed. Education programs in place (within industries, and among customers) – target date subject to identification of finances.	Ranking 2014: Low/med 2015: 2016: 2017: 2018: 2019:
		1.4.2	Documentation and education program	Low/Medium		
<b>1.5</b>	In the wake of Standards RD&E, undertaking market research on quality-based branding and packaging options for the Australian industry Execution = 2017-2018	1.5.1	Scoping R&D on branding	High	Standardised packaging options available for use by the industry by 2018.	Ranking 2014: Medium 2015: 2016: 2017: 2018: 2019:
		1.5.2	Quality control in packaging	Medium/high		

**2. Market access and understanding:** To undertake RD&E projects and activities that will deliver outcomes that improve market access, understanding and penetration.

	Objective	R&D Strategy			Key Performance Indicators	Current ranking
<b>2.1</b>	Increasing knowledge and awareness of domestic	2.1.1	Industry Stocktake	High	Industry stocktake completed/published by	Ranking 2014: High 2015:

	market opportunities	2.1.2	Investigations/consultation on potential models including cooperative structures	Very High	2015. Entrenchment of an ASIC-approved, cooperative, whole-of-industry approach to logistics servicing the domestic market.	2016: 2017: 2018: 2019:
		2.1.3	New product development e.g. frozen	Medium		
2.2	Develop a better understanding of international markets and market opportunities Execution = 2014-2016	2.2.1	Develop a better understanding of new O.S. markets	Very High	Australian truffles entering new markets and increasing their share within existing markets overseas – first impacts appearing 2015/16	Ranking 2014: Very High 2015: 2016: 2017: 2018: 2019:
		2.2.2	Developing a better understanding of other producers in the southern hemisphere	Medium/ High		

### 3. Deliver constant improvement to the industry's production systems focussing on areas of greatest threat as well as those of greatest promise to the industry.

	Objective	R&D Strategy			Key Performance Indicators	Current ranking
3.1	Optimise production and management through research and documentation. Execution = ongoing	3.1.1	Pest management, incl. Chemical permits / registration	High	New options tested and improvements documented for adoption by industry participants.	Ranking 2014: Med-High 2015: 2016: 2017: 2018: 2019:
		3.1.2	Post harvest handling/preservation	Low		
		3.1.3	Post-harvest infestation	Low		

		3.1.4	<i>T. melanosporum</i> life cycle/phenology	High		
		3.1.5	Best practice (irrigation, soil management, water quality, pruning etc.)	Medium		
		3.1.6	Dog training	Low		
3.2	Education of growers on production optimisation and management Execution = ongoing	3.2.1	Technical information series (Sheets for growers)	Medium	At least 3 information sheets per year completed and released. (includes updates – ongoing)	Ranking 2014: High 2015: 2016: 2017: 2018: 2019:

**4. Capacity building and communication:** To communicate RD&E strategies and outcomes to industry participants and other stakeholders in a way that shares technical intelligence while nurturing cohesiveness and mutual support within the industry

	Objective	R&D Strategy			Key Performance Indicators	Current ranking
4.1	Building and maintaining an ongoing association with / engagement of tertiary R&D institutions/ practitioners	4.1.1	Targeted engagement/ retention of industry's scientists	Very High	Truffle-specialist scientists are available to work with the industry on critical issues during this 5 year	Ranking 2014: High 2015: 2016: 2017: 2018:
		4.1.2	Scholarships/internships	Medium		
		4.1.3	Education/TAFE units	Low		

				period.	2019:	
4.2	Maintaining an active, continuously improving information structure for dissemination of RD&E. Execution = ongoing	4.2.1	Ongoing evolution of website	High	Website shows a continuous trend of increasing usage over time. Improved involvement of major industry players in discussions and decision making around RD&E for the industry. Informative newsletter produced at least 6 /year.	Ranking 2014: High 2015: 2016: 2017: 2018: 2019:
		4.2.2	Integration of larger growers	Very High		
		4.2.3	Newsletter	Very High		
4.3	Continuation of cost-effective national conferences and regional workshops of high relevance to industry participants. Execution = 2014-ongoing	4.3.1	Continued conferences, well-targeted workshops and field days	High	Conferences and workshops with a strong RD&E focus continue to be well attended and well received (as reviewed through attendee feedback surveys)	Ranking 2014: High 2015: 2016: 2017: 2018: 2019:
4.4	Maintaining strong and focussed links with relevant government bodies. Execution = 2014-	4.4.1	Maintenance of ongoing pro-active partnership with RIRDC and other relevant government bodies eg PHA, APVMA etc.	High	Conferences and workshops with a strong RD&E focus continue to be well attended and well	Ranking 2014: Very High 2015: 2016: 2017: 2018: 2019:

	ongoing	4.4.2	Formation of Truffle Industry RD&E reference panel.	Very High	received (as reviewed through attendee feedback surveys). Government stakeholders continue to be actively engaged in the stewardship of the industry's RD&E.	
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## 7. Proposed Budget

Budget allocations will be adjusted annually subject to income estimates and priorities.

–	2014/15	2015/16	2016/17	2017/18	2018/19
<b>Revenue ‘000</b>					
RIRDC*	75	75	75	75	75
Industry contributions	20	25	35	40	45

\*RIRDC funds are subject to the industry achieving at least 25-50% voluntary cash contributions to any truffle project that is funded.

### Expenditure

Breakdown of expenditure by Strategic priority area:

1. Quality Standards: Budget allocation = 32%
2. Market Access and Understanding: Budget allocation = 31%
3. Productivity: Budget allocation = 17%
4. Capacity Building and Communication: Budget allocation = 20%

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This is a proposed budget which signals the level of investment envisaged. Neither RIRDC or the industry are obliged to meet these targets.

## 8. Communication, Adoption and Commercial Opportunities

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

- A carefully designed and executed communications plan that facilitates access of R, D&E outcomes for Australian growers.
- The utilization of opportunities to engage relevant stakeholders in the communications strategy including the use of field days, growers 'meetings (e.g. annual conferences and workshops) and the like.
- The incorporation of field days and fact sheets in association with each "hands-on" research finding of note/use to the industry's growers.
- The direct engagement of industry participants in any ongoing research (wherever possible) through the use of growers' farms for conducting R, D & E.
- The production of a regular newsletter that focuses on R, D & E outcomes/findings.

### Commercialisation/IP

Commercial opportunities relating to R, D & E activities will be explored as they arise.

Where matching industry funding is provided, IP protection for a period of up to three years may be sought (by negotiation with RIRDC).

Ultimately research that is co-funded by RIRDC's public funds will be made available in the public domain to benefit all Australian truffle growers.

# APPENDIX 1 – Synthesis of Industry Consultation: Target Activities, their Priority and Status

RD&E CATEGORY	Target activity	Priority	Status
<b>1. QUALITY STANDARDS</b>			
1.1	Quality Grading Standards	High	In progress - ongoing commitment through industry workshops
1.2	Seedling Certification Scheme	High	In progress - ongoing commitment from industry
1.3	Biosecurity (in and out)	Very High	Funding application in progress
1.4	Provenance of marketed truffle	Low/Medium	New, but based on considerable ANU DNA/mapping research funded by industry and RIRDC
1.5	In the wake of standards RD&E, to undertake market research on opportunities for quality-based Australian-branded product.	High	New
<b>2. MARKET ACCESS AND UNDERSTANDING</b>			
2.1	Increasing knowledge and awareness of domestic market opportunities	Very High	Terms of reference established but require review
2.2	Developing a better understanding of international markets and market opportunities	Very High	New
<b>3. PRODUCTIVITY</b>			
3.1	Production optimisation and management (research and documentation)	Med - high	On-going commitment
3.2	Education of growers on production optimisation and management	High	On-going commitment
<b>4. CAPACITY BUILDING AND COMMUNICATION</b>			
4.1	Ongoing association with/engagement of tertiary R&D institutions	High	On-going commitment
4.2	Maintaining an active information structure - including Website --	High	In progress - on-going commitment
4.3	Continued national conferences and regional workshops	High	On-going commitment
4.4	Maintain strong and focussed links with relevant government bodies	High	On-going commitment

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