

# Australian TRUFFLE GROWERS ASSOCIATION



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President

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Australia's truffle industry:  
consolidating export  
markets & protecting our  
reputation for high quality

- Introduction
- 1996 & 20 years on
- Future – maintaining an edge

# Truffles

- Fungus growing on the roots of specific host trees – mutually beneficial relationship
- Fruiting body grows underground
- Produces aroma to attract fungivores
- Winter fruiting truffles more aromatic
- Globally 64 species commonly eaten
- Many species of Australian “truffle”- no culinary value

# Exotic *Tuber* (truffle) species established in Australia

## Black

- *T. melanosporum*
- *T. uncinatum*
- *T. aestivum*
- *T. brumale*\*
- *T. indicum*\*\*

\* introduced as contaminants

## White

- *T. borchii*
- *T. maculatum*\*
- *T. dryophilum*\*
- *T. puberulum*\*

\*\* eradicated

# *T. melanosporum* & *borchii*



# 1996 – “An economic evaluation of establishing a truffle industry on mainland Australia” for RIRDC

- Little science, romantic myths, secret squirrels
- Customers & consumers - poor understanding of truffles
- French selling “Extra Grade” truffles around the world that could by convenient definition include other species
- Dry spore technique for inoculating trees → contamination
- No production (planting 1993, first harvest 1999)
- *“Mon dieu pas en Australie”*



# Oak with *T. melanosporum*





# Pines with *T. borchii*



## 2016 Characteristics of industry - Australia (i)

### *T. melanosporum* – Périgord black truffle

- ~250 engaged in growing (< 50% producing on < 50% trees)
- Production levels from 0 < 500 kg/ha
- < 50% rot
- 4<sup>th</sup> largest producer *T.melanosporum* globally
- 85% export - >30 countries - USA, Europe (France mainly), Asia (HK, Singapore & Japan mainly)

## 2016 Characteristics of industry - Australia (ii)

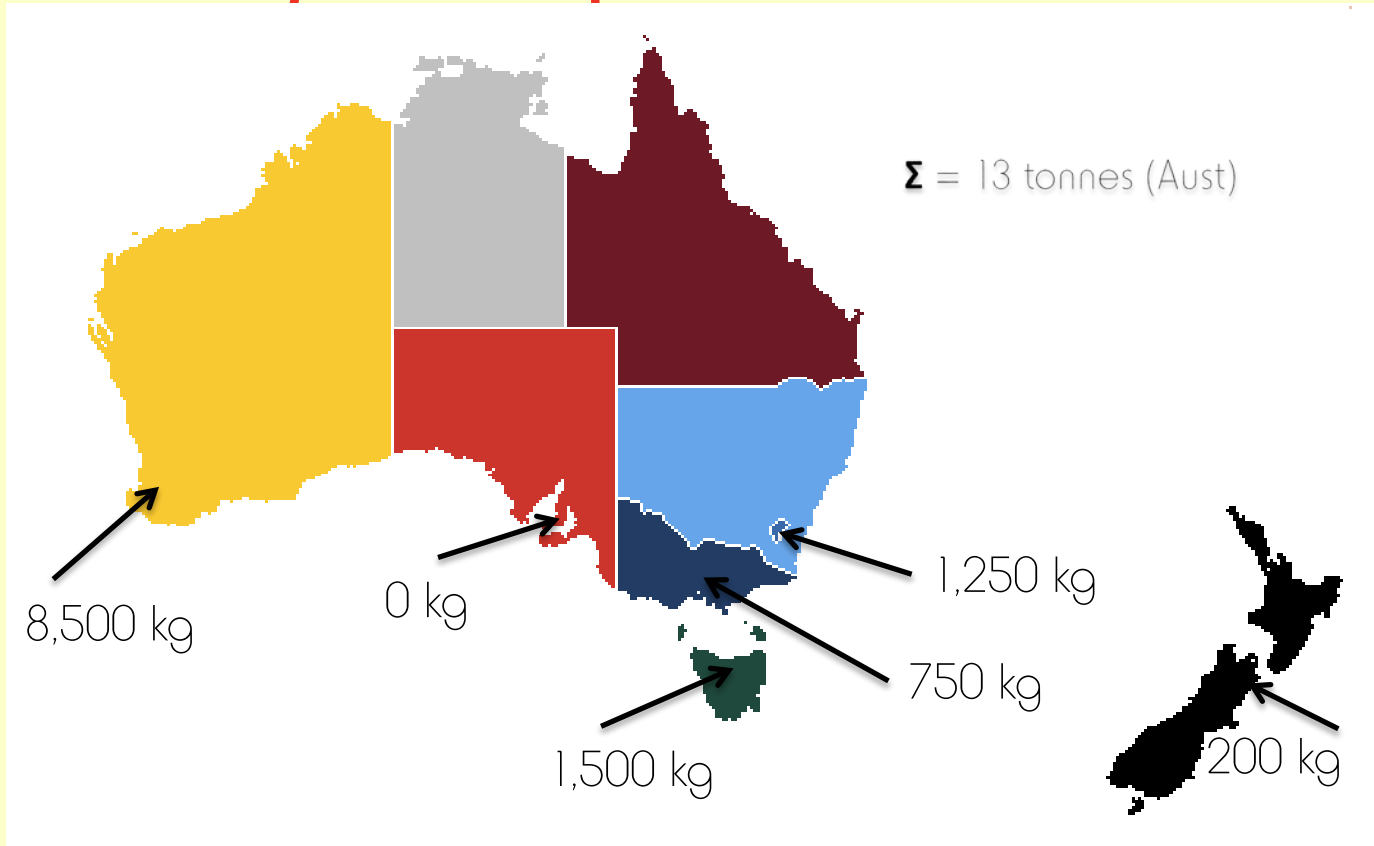
*T. melanosporum* – Périgord black truffle

- Farmgate return \$950 / kg average
- High priced commodity internationally & domestically – \$5,461 / kg “Maison de la Truffe”, Paris Aug '16
- Customers & consumers - poor understanding of truffles still
- Growers – limited but improving understanding

# Make up of the industry 2016

- 3 very large growers (10,000 – 38,000 trees)
  - 4 medium sized growers (3,000 – 9,999 trees)
  - ~ 150 small-medium (400 – 2,999 trees)
  - ~ 75 small (< 400 trees)
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- East coast more boutique style production
  - Greatest number of growers ACT/NSW

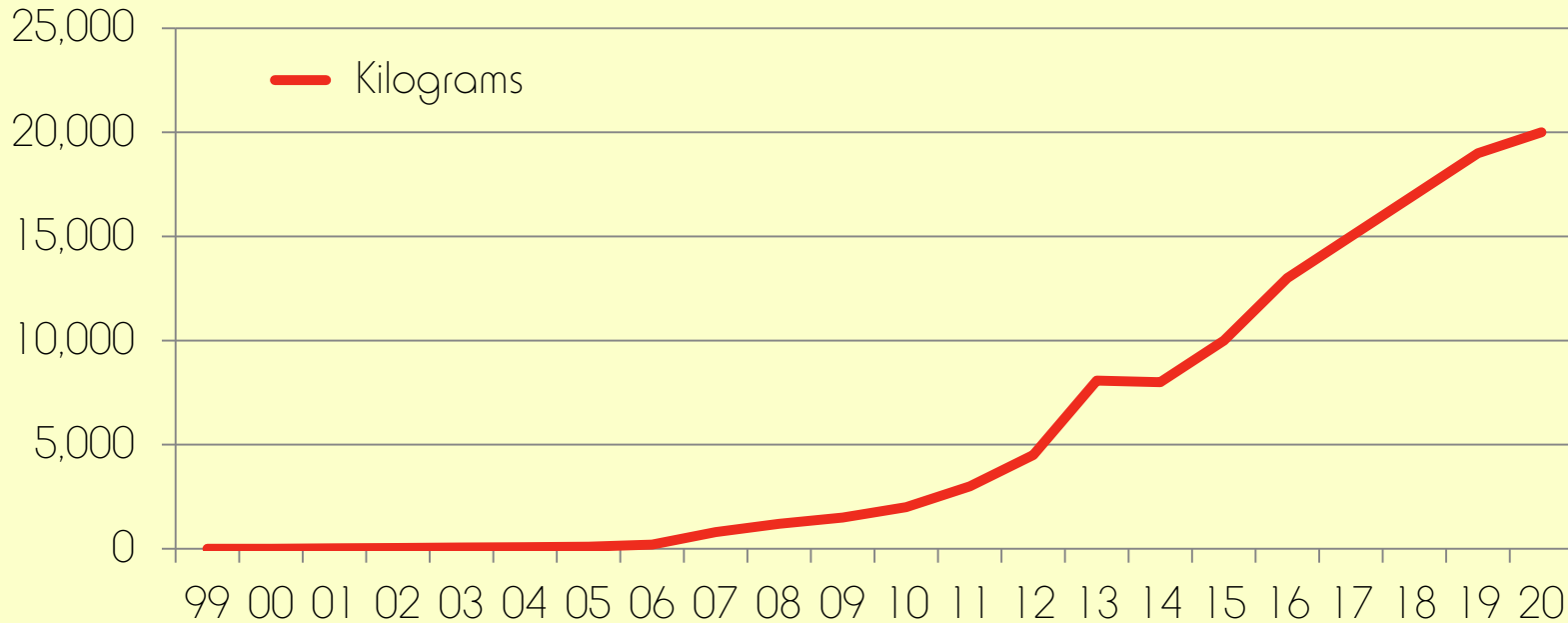
# *T. melanosporum* production 2016





# Australian *T. melanosporum* production

*Annual harvest*



# 2016 Characteristics of industry - Europe

## Tuber melanosporum – Périgord black truffle

- Harvest Northern Hemisphere winter
- Natural forest harvest declining
- Annual production
  - France 15 – 80 tonnes
  - Italy 10 – 80 tonnes
  - Spain 5 – 80 tonnes
- Greater reliance on “traditional” methods – e.g. irrigation rare
- Substitution still rife. Quality assurance? TBTs?
- ~ 50% processed (pieces & whole canned, frozen for domestic & commercial)

# Australia - threats to sustained growth & profitability

- Loss of integrity domestically & internationally – species & grades
- Competitors in Southern Hemisphere - Sth America, Sth Africa
- Discounting domestically & internationally
- Indiscriminate use of truffle aroma (**2,4-Di-thiapentane**)
- Inability to engage with customers & consumers
- Truffle & host tree disease

# Maintaining an edge in a global context

Unified, collaborative approach to quality & supply

1. Cooperative marketing
2. Adopting common quality standards
3. Educating customers & consumers (globally & domestic)

# Maintaining an edge – industry RD&E

1. Grower's Guide
2. Pests & Diseases
3. Biosecurity
4. Communications
5. R&D and Marketing Levies?



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