Brismark Survey of Fruit and Vegetable Growers

March 2026

ROY MORGAN

Brismark

Table of Contents

Background	3
Methodology	4
Sample Profile	5
Executive Summary	6
Findings	7
Perceptions of the Brisbane Markets	9
Issues of Importance for Fruit and Vegetable Growers	13
Horticulture Code of Conduct	17
Grower disputes with Market Wholesalers	22

Background

The mandatory Horticulture Code of Conduct, which regulates trade between growers and traders of horticulture produce, is being reviewed by the Federal Government in early 2026.

Brismark, who represents wholesalers in the fruit and vegetables industry, commissioned research with independent market research firm, Roy Morgan.

This research was conducted to:

- **Measure growers understanding and priorities in relation to the mandatory code of conduct**
- **Understand which areas of the code, and of the industry in general, are most important to growers**
- **Understand the frequency and nature of disputes between growers and wholesalers, and their method of resolution**
- **Measure growers' perceptions of the Brisbane Markets**

The findings of this research are intended to inform Brismark's submission into the review of the Horticulture Code of Conduct.

The research, which was a mixed-mode CATI (computer assisted telephone interviewing) and CAWI (computer assisted web interviewing) survey, was conducted in February and March 2026, and involved interviewing n=441 Australian fruit and vegetable growers. The key findings of this research are presented in this report.

Roy Morgan previously conducted research for Brismark in May 2007, when the Horticulture Code of Conduct was first introduced. Some findings from that research have been directly compared in this report.

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026.

Methodology

Methodology

Mixed mode CATI (telephone) and CAWI (online) survey

Target Audience

Australian fruit and vegetable growers

Sample Size & Source

Growers list supplied by Brismark; Roy Morgan Farmers Panel.

sample size: n=441 (CATI n=229, CAWI n=212)

Questionnaire Length

Average survey length of:

12 minutes (CATI)

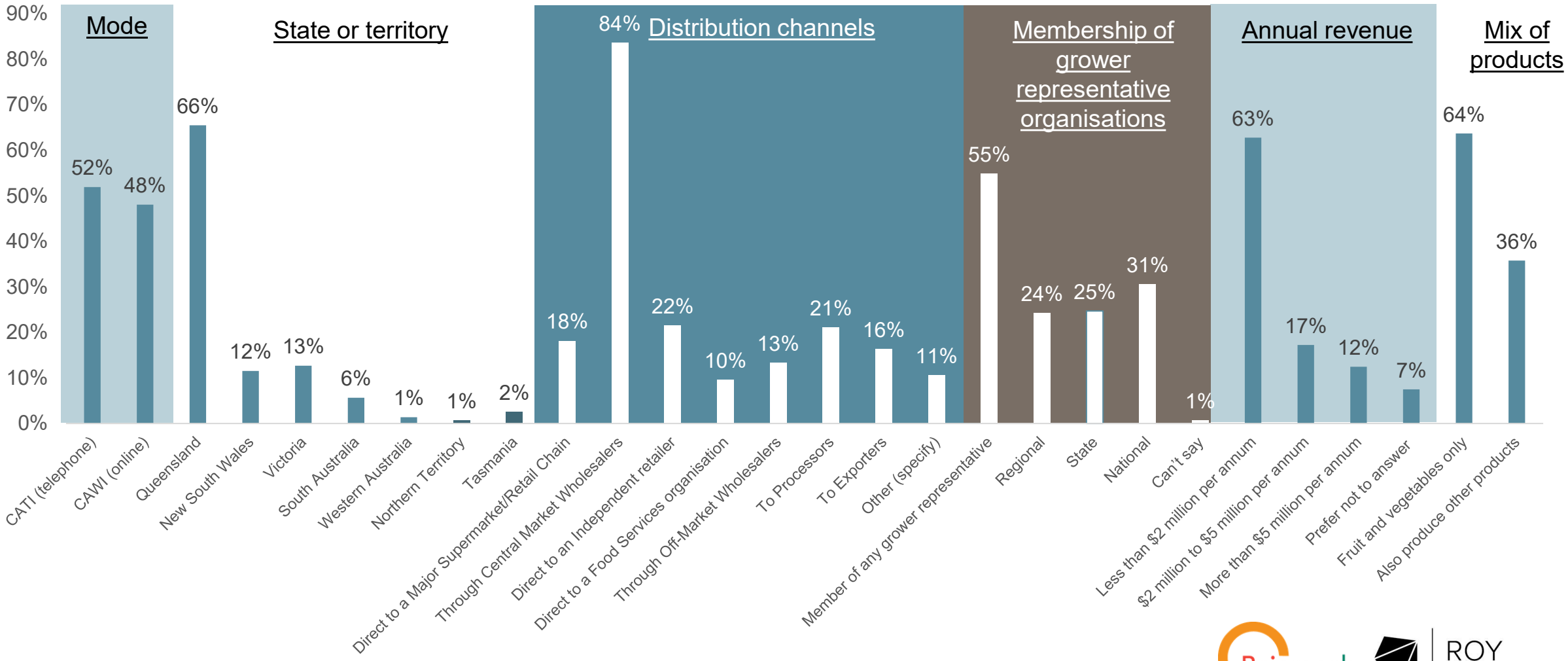
11 minutes (CAWI)

Fieldwork Timing

Fieldwork conducted 24 February to 10 March 2026

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026

Sample Profile



Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026.
Base: Australian fruit and vegetable growers n=441.
Note: Percentages may not add to 100% due to rounding.

Executive Summary

Background

In February 2026, Brismark commissioned Roy Morgan to conduct research with Australian fruit and vegetable growers. This research was commissioned in the context of the Federal Government's review of the mandatory Horticulture Code of Conduct. The research aimed to gather input from growers into their perceptions of the current adequacy of the code and any changes they would support or oppose. The survey also measured perceptions of the Brisbane Markets, awareness of their services, and experiences with commercial disputes.

The survey was a mixed mode CATI (computer-assisted telephone interviewing) and CAWI (computer assisted web interviewing) survey, conducted from 24 February to 10 March 2026. A total of n=441 surveys were conducted.

Perceptions of the Brisbane Markets

Overall perceptions of the Brisbane Markets were positive, with two-thirds of growers who deal with the Brisbane Markets having a positive view of them .

There was a relationship between awareness of the Brisbane Markets' services, and views of the Brisbane Markets. Growers who were aware of more services were more likely to have a positive view of the Markets. This relationship was especially strong among those who were aware of the 'Produce Matching to Wholesalers' service. This also happened to be the service with the lowest level of awareness, at 44%. The FreshTest® horticulture residue testing service had the highest level of awareness at 78%.

Issues of importance for growers

All 10 issues tested in the survey were considered to be important to a majority of growers, but there was some difference across the issues. Biosecurity was seen as important by almost all (98%) growers, while 'Government compliance and regulation frameworks in managing the burden of compliance costs' was the least important with 79% of growers considering it important.

Key Metrics	
66%	Have a positive view of the Brisbane Markets
78%	Aware of FreshTest® service
44%	Aware of Produce Matching to Wholesalers service
98%	Consider biosecurity to be important
79%	Consider government compliance and regulation frameworks important

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026.

Executive Summary

Awareness and Knowledge of the Horticulture Code of Conduct

Awareness of the mandatory Horticulture Code of Conduct was almost universal with 96% of growers at least aware of the code. The survey tested awareness of 6 aspects of the code (including the requirement for documented Horticulture Produce Agreements, provision for dispute resolution, and monetary penalties where breaches occur). Around two-thirds of growers were aware of all or most of these aspects. Knowledge of these aspects of the code was higher among growers with annual revenues above $2 million.

Support for increased flexibility in the Horticulture Code of Conduct

Eight in ten (81%) growers supported 'flexibility within the commercial arrangement wherein the return price to the grower is based on the sale price achieved by the wholesaler less an agreed margin' and three in five (61%) supporting the ability contract out some requirements of the code that may not be relevant. Support for these measures was higher for growers with less than $2 million in annual revenue.

Dispute with wholesalers

Just one in five (22%) growers had a commercial dispute with a Market Wholesaler in the last 5 years, with most (56%) of these disputes having a value of less than $30,000.

Most disputes were resolved between the grower and the wholesalers directly, with very few (6%) requiring the assistance of a third party.

Key Metrics	
96%	Aware of the Horticulture Code of Conduct
65%	Aware of most or all areas of the Code
81%	Support price flexibility within the Code
61%	Support the ability to contract out some requirements
22%	Had a dispute with a Market Wholesaler in last 5 years
6%	Required assistance of third party to resolve dispute

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026.

Findings

Perceptions of the Brisbane Markets

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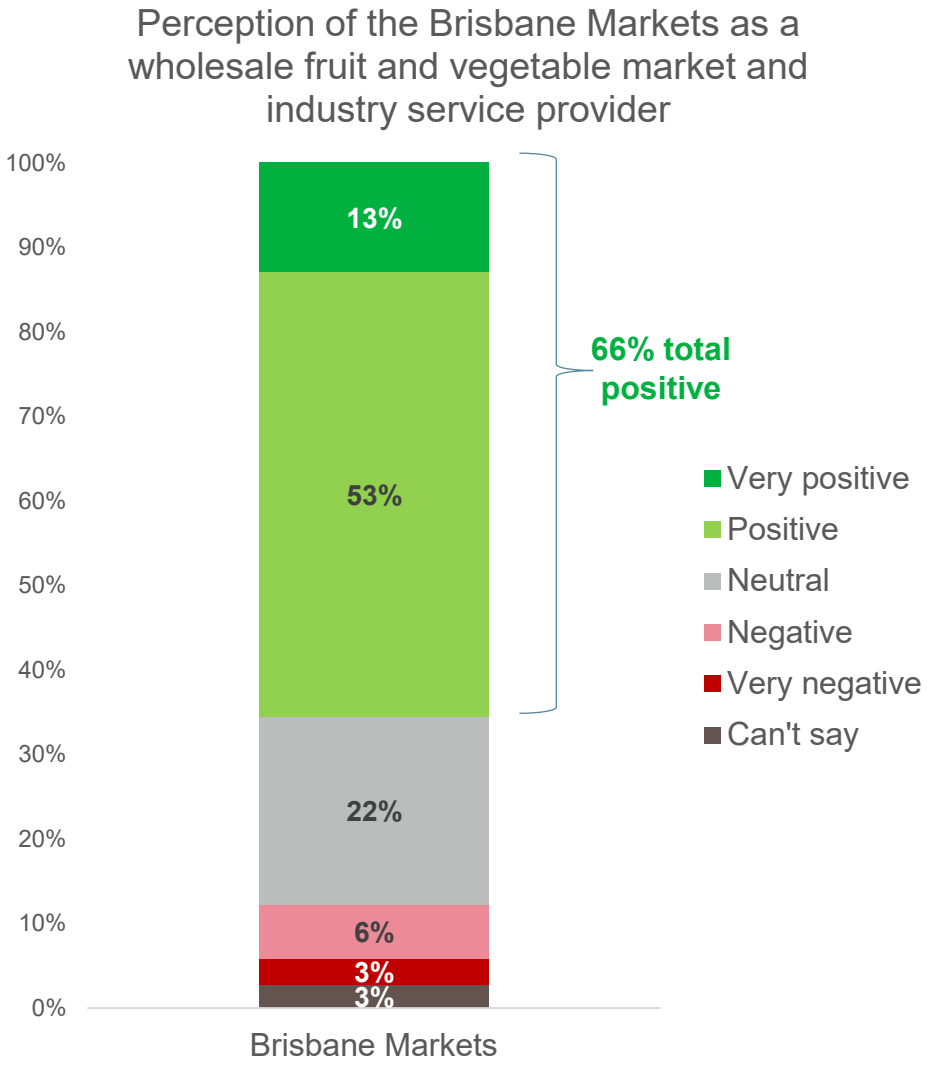
Two thirds of growers had a positive view of the Brisbane Markets, with less than one in ten having a negative view.



Overall, perceptions of the Brisbane Markets among growers were mostly positive, with two thirds (66%) having a 'very positive' or 'positive' view.

The following growers were more likely to have positive views:

- Those who sell through Off-Market Wholesalers (78% positive) and those who sell direct to Independent Retailers (72%)
- Those who were aware that the Brisbane Markets provides Produce Matching to Wholesalers were also more positive (75%)

Growers who had had a dispute with a Market Wholesaler in the last 5 years were much more likely to have a negative view of the Brisbane Markets (25% v 5% who had not had a dispute).

The vast majority of respondents who deal with the Brisbane Markets were aware that the Brisbane Market Wholesalers support documented terms of trade (89%).

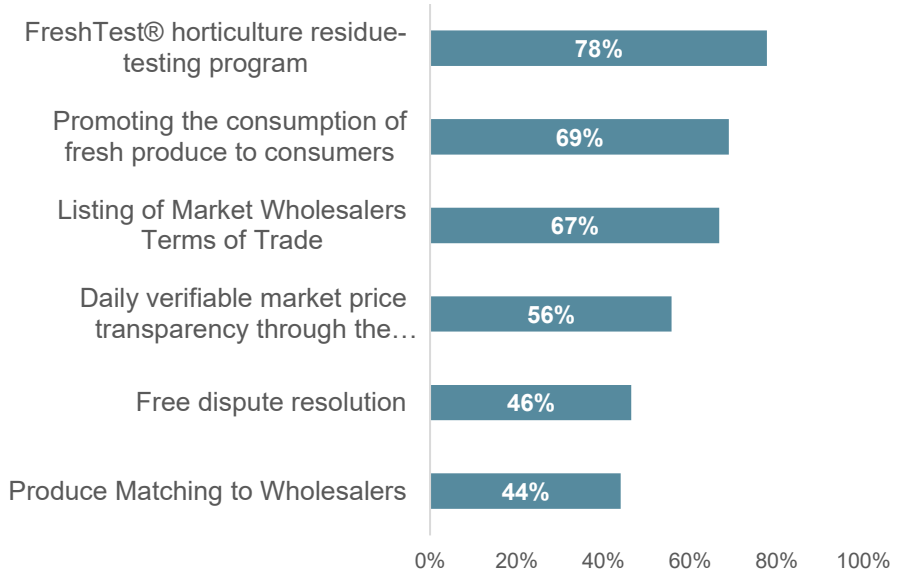
Those who were aware of the Brisbane Markets wholesalers support of documented terms of trade were more likely to have a positive view of the Brisbane Markets (68%) compared to those who were not aware (45%).

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q5. What is your view of the Brisbane Markets as a wholesale fruit and vegetable market and industry service provider?
Base: Growers who deal with the Brisbane Markets n=409.

Awareness was highest for the FreshTest® and the promotion of fresh produce to consumers and lowest for produce matching to wholesalers.

- Respondents who deal with the Brisbane Markets were asked about their awareness of several services that the Brisbane Markets provides.

Awareness of services provided by the Brisbane Markets (among growers who deal with the Brisbane Markets)



Awareness of services varied, with FreshTest® having the highest level of awareness, with over three-quarters (78%) of growers aware of this.

Less than half of growers were aware of Produce Matching to Wholesalers – however this was the service that had the strongest relationship with positive perceptions of the Brisbane Markets, with growers who were aware of this service more likely to have a positive perception of the Markets.

Growers who knew more about the services the Brisbane Markets provide tended to have a more positive perception of the Markets, with 73% of growers who were aware of 4 or more services holding a positive view of the Markets, while just 57% of those who knew of 3 or fewer services having a positive view of the Markets.

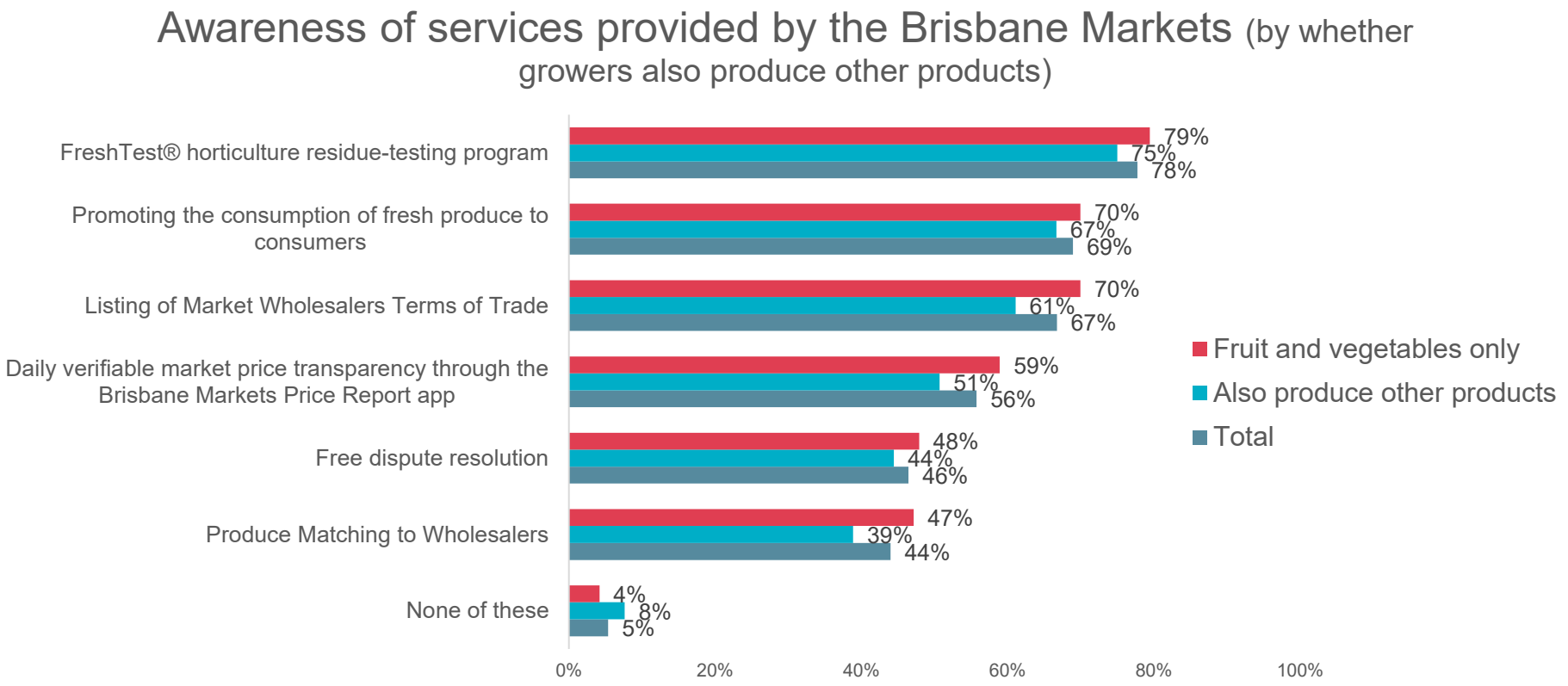
Similarly, those who knew of fewer services were more likely to hold negative views of the Markets, with 14% of growers who knew of 0-2 services having a negative view, compared to 9% of all growers.

Awareness of the free dispute resolution service was *lower* among those who had a dispute in the last 5 years (39%) compared to those who had *not* had a dispute (48%).

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q6b. Are you aware that Brisbane Markets Wholesalers provide the following services for growers?
Base: Total Australian fruit and vegetable growers that deal with the Brisbane markets n=409.

Growers who only produce fruit and/or vegetables (and nothing else) were more likely to be aware of the services the Brisbane Markets provide.

- Across all of the services provided by the Brisbane Markets, the level of awareness was higher among those who only produce fruit and vegetables, compared to those who also produce other products. The gap was widest for ‘Listing of Market Wholesalers Terms of Trade’.

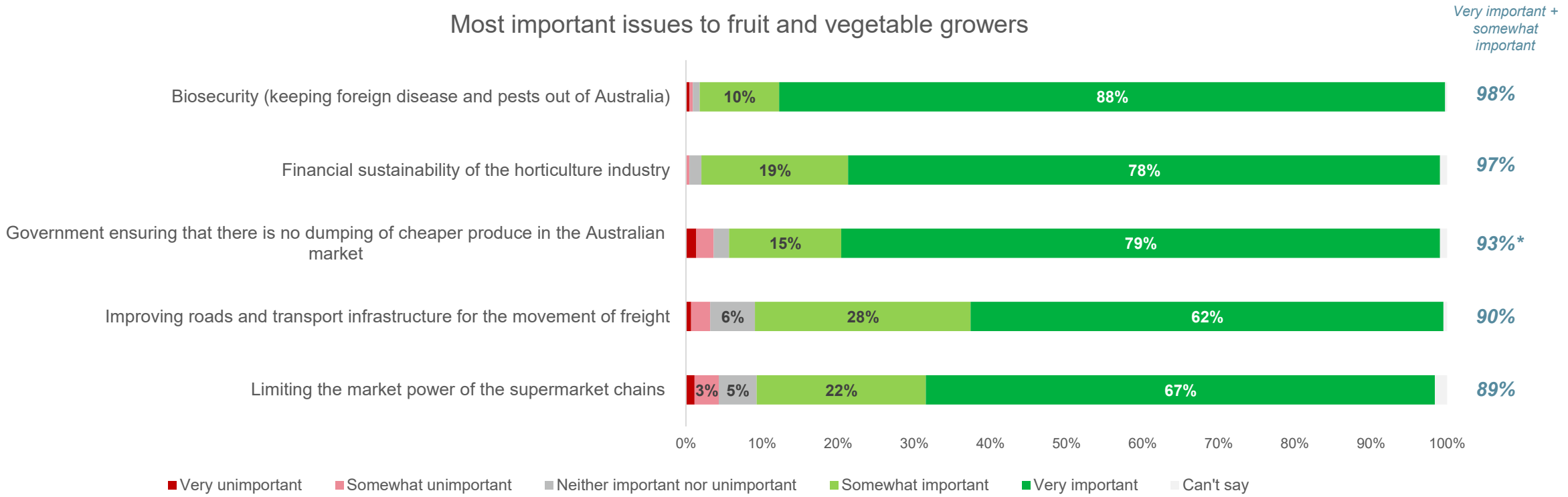


Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q6b. Are you aware that Brisbane Markets Wholesalers provide the following services for growers?
Base: Total Australian fruit and vegetable growers that deal with the Brisbane markets n=409. Fruit and veg only n=263, Also produce other n=144. (Can’t say (not shown) n=2).

Issues of importance for fruit and vegetable growers

Biosecurity was the issue that was seen as important by the most growers, with almost all (98%) growers seeing it as important.

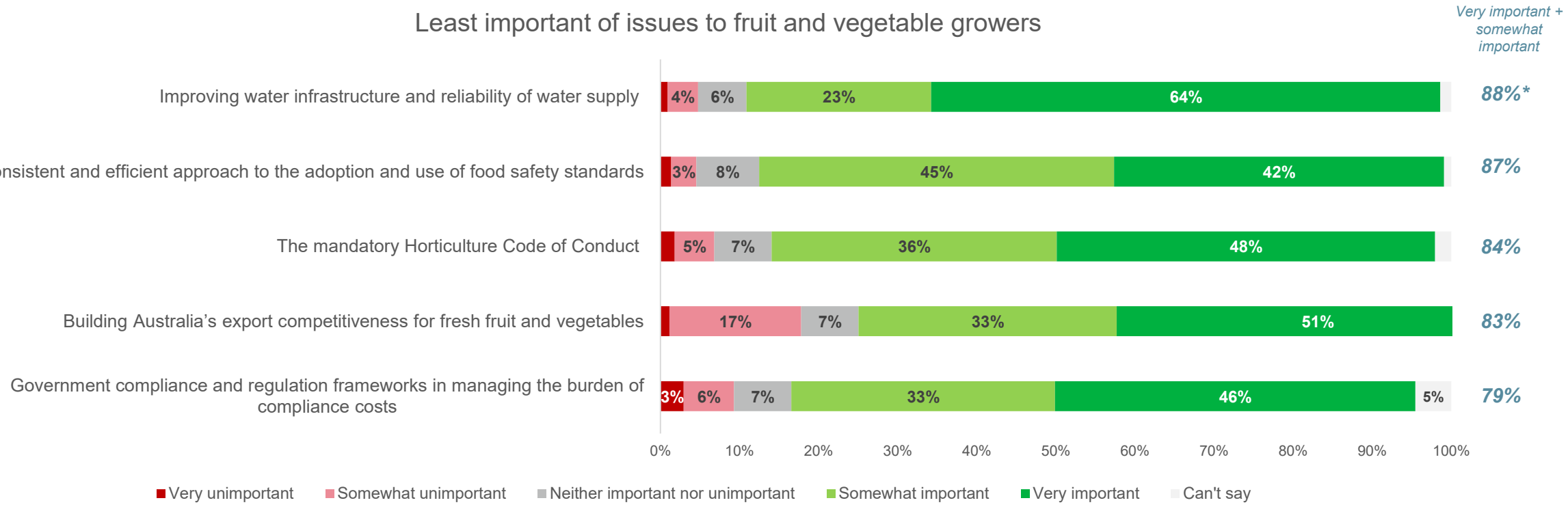
- Respondents were asked how important a list of 10 different issues were to them. All of the issues tested had a majority of respondents indicate they were important, with nearly all growers saying biosecurity and financial sustainability of the industry were important to them.



Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q7. How important or unimportant are each of the following to you as a fruit/vegetable producer?
Labels not shown for data points <3%.
* Note: Totals may differ slightly from the sum of components due to rounding.
Base: Australian fruit and vegetable growers n=441.

Government compliance had the lowest proportion of growers nominate it as an important issue but was still seen as important by the majority (79%).

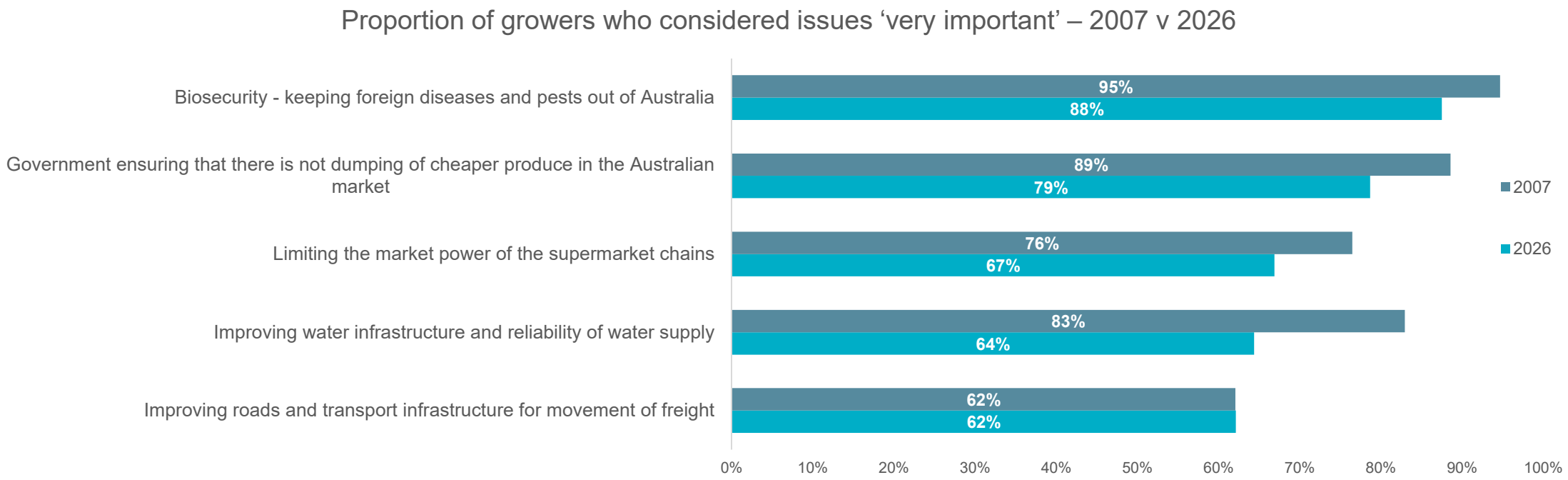
- Even the issues with the lowest perceived levels of importance still had around **eight in ten** growers stating that they were important. Government compliance had the lowest overall importance level, but building Australia's export competitiveness for fresh fruit and vegetables recorded the highest level of 'unimportant'.



Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q7. How important or unimportant are each of the following to you as a fruit/vegetable producer?
Labels not shown for data points <3%.
* Note: Totals may differ slightly from the sum of components due to rounding.
Base: Australian fruit and vegetable growers n=441.

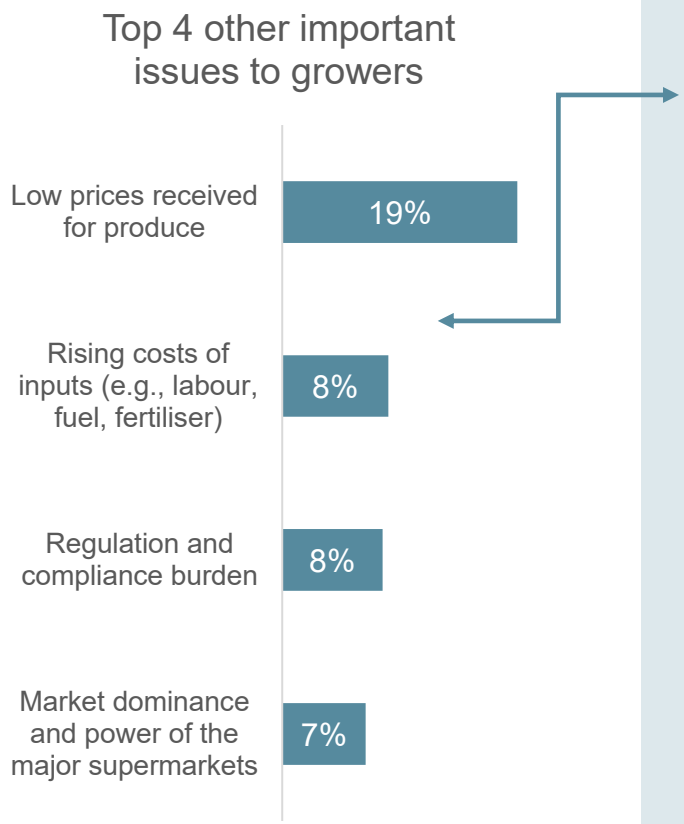
Compared to 2007, growers were less likely to say issues were ‘very important’ to them, with decreases observed across almost all measures.

- Improving roads and transport infrastructure was the only measure not to record a notable decrease in the proportion of growers saying they were ‘very important’.



Sources: Brismark Survey of Growers May 2007. Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q7. How important or unimportant are each of the following to you as a fruit/vegetable producer?
Base: Australian fruit and vegetable growers n=441.

The low prices received for their produce, as well as rising costs and regulatory burdens were the most frequently mentioned other issues.



Is there any other issue in the horticulture industry which is very important to you as a fruit/vegetable producer?

Compliance with federal guidelines around labour hire. The amount of people availability and the restrictions on hire and compliance standards. For small growers, these compliances are good for safety, makes it only viable for big growers. The paperwork involved to get help is too much. Small growers are leaving industry. more promotion of the small growers, we need more flexibility.

There is little trust left in the system at any level, it is now survival of the deepest cheque book Growers are price takers Wage costs for our industry are out of control.

The grower has no power in the equation. There are no effective safeguards for the grower to achieve a fair and equitable value for their produce. Not transparent or trustworthy. Don't know who it is sold to or at what price. The price and variables of the sales cannot be reliably confirmed. The code is not functioning properly to address this.

Farmers are corporate slaves of the industry. Woolies and Coles don't pay fair price. Go back to central markets.

The increasing costs and the decreasing prices we receive is making avocado farms unsustainable for growers, especially small growers who cannot achieve economies of scale. Regulatory costs, wages, power, and agricultural chemical prices are increasing beyond sustainability, while product prices are stagnant or declining.

The rising cost of input such as labour, the effect it has on producers' underlying profitability and the regular occurrence of the market being below cost of production.

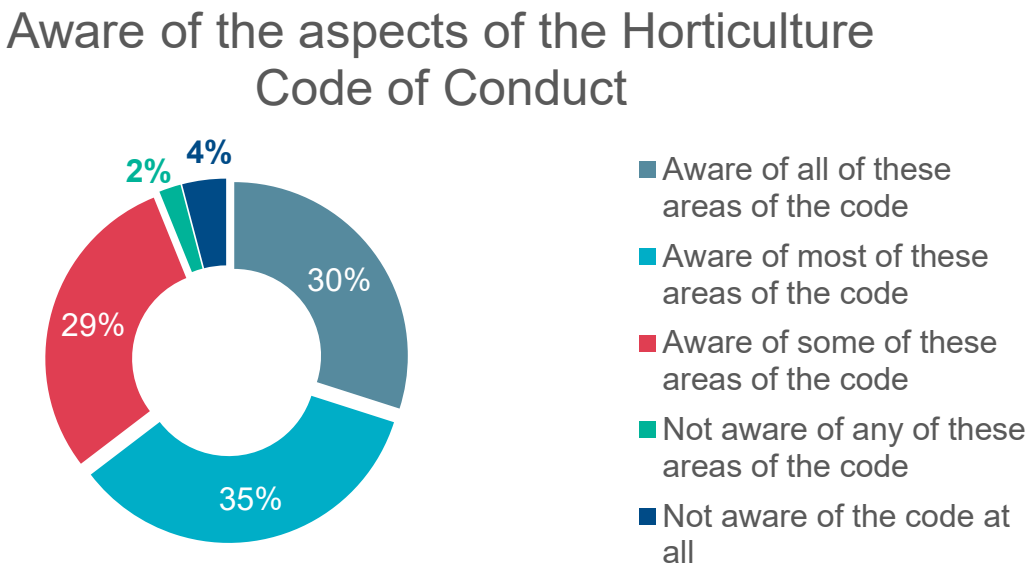
Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026

Q8. Is there any other issue in the horticulture industry which is very important to you as a fruit/vegetable producer? *Please say one only.*
Base: Australian fruit and vegetable growers n=441.

Horticulture Code of Conduct

Two-thirds (65%) of growers were aware of all or most of the code, with awareness higher among businesses with higher revenue and members of grower representative organisations.

- Respondents were asked whether they were aware of all, most or some of the following areas of the Horticulture Code of Conduct:
  - Spells out how transactions are to occur
  - Requires the use of a documented and executed Horticulture Produce Agreement
  - Provides for a dispute resolution process
  - Provides for monetary penalties where breaches occur;
  - Requires growers and traders/wholesalers to keep certain records and;
  - Requires Merchants to explain how the return price will be determined.



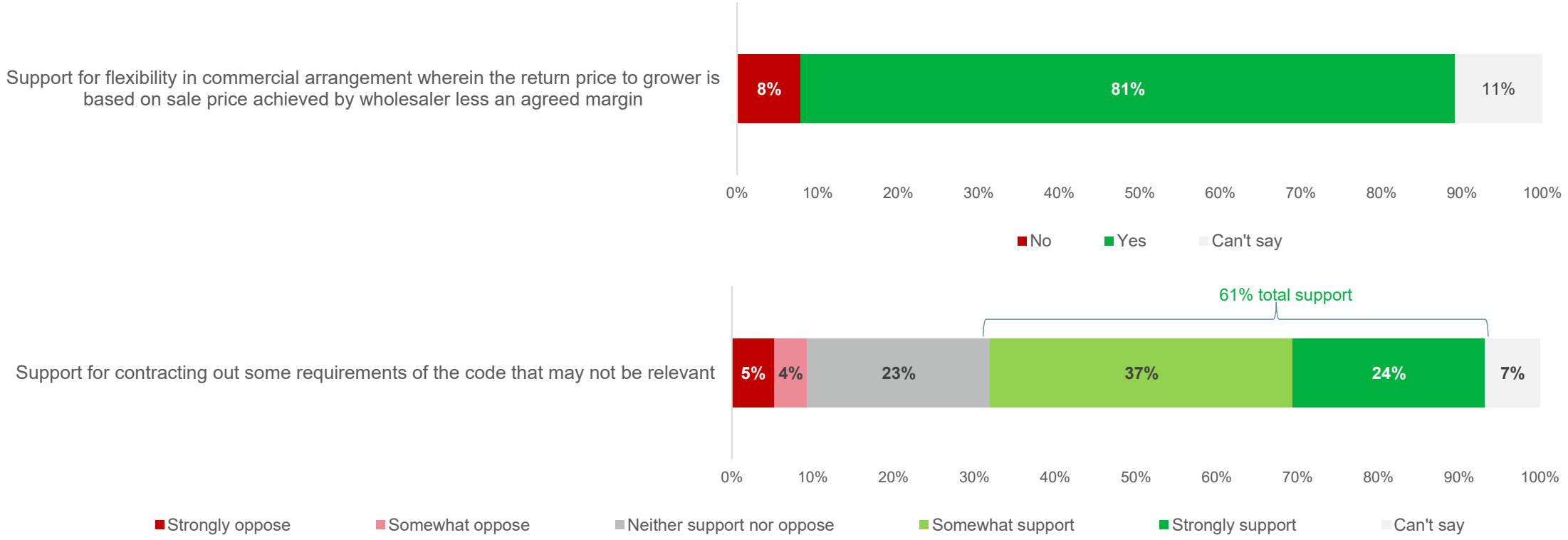
Awareness levels by business revenue and membership of grower representative organisation (GRO)

	TOTAL	Less than $2 million per annum	$2 million to $5 million per annum	More than $5 million per annum	Member of GRO	Non-member of GRO
Aware of all of these areas of the code	30%	24%	41%	40%	34%	25%
Aware of most of these areas of the code	35%	33%	34%	42%	40%	29%
Aware of some of the areas of the code	29%	35%	20%	15%	23%	38%
Not aware of any of the areas of the code	2%	2%	3%	2%	2%	2%
Not aware of the code at all	4%	5%	3%	2%	2%	7%

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q9. The mandatory Horticulture Code of Conduct regulates transactions between growers and wholesalers and spells out how these transactions are to occur, requires the use of a documented and executed Horticulture Produce Agreement and provides for a dispute resolution process. Would you say that you are:
Note: Percentages may not add to 100% due to rounding.
Base: Australian fruit and vegetable growers n=441.

Strong support for increased flexibility in commercial agreements, and majority support for contracting out some requirements of the code.

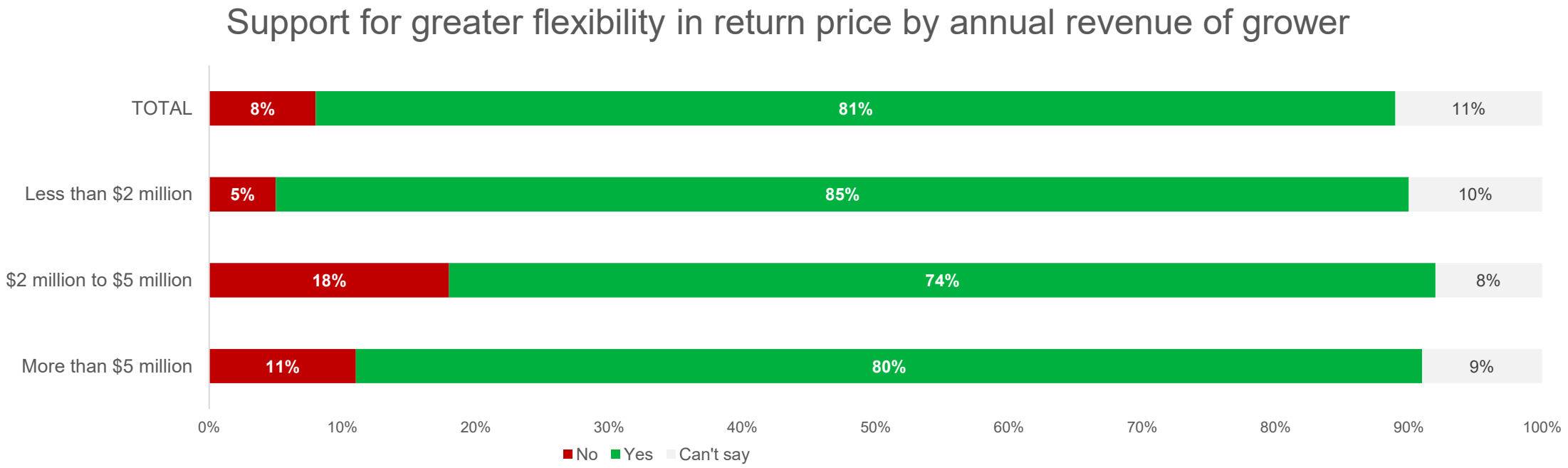
- Respondents were asked whether they supported specific proposals to increase flexibility in the code of conduct. There was strong support for both proposed measures.



Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q10. The Market Wholesaling sector wants to ensure the Horticulture Code of Conduct allows growers and wholesalers flexibility in their commercial arrangement This includes the ability to have a merchant transaction where the return price paid to the grower is based upon the sale price received by the wholesaler less an agreed margin. Do you support having this flexibility in the code?
Q11. The Market Wholesaling sector also wants to ensure the mandatory Horticulture Code of Conduct allows growers and wholesalers the ability to contract out some requirements of the code if they are not relevant to them… How strongly do you support or oppose having this flexibility in the mandatory Horticulture Code of Conduct?
Base: Australian fruit and vegetable growers n=441.

Support for flexibility in the code relating to the final price paid to the grower was stronger among growers with lower annual revenues.

- Growers with annual revenues less than $2 million were more likely to support increased flexibility around the final price paid to growers (85%) compared to those whose annual revenue was in the middle band of $2 million - $5 million (74% support).



Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q10. The Market Wholesaling sector wants to ensure the Horticulture Code of Conduct allows growers and wholesalers flexibility in their commercial arrangements. This includes the ability to have a merchant transaction where the return price paid to the grower is based upon the sale price received by the wholesaler less an agreed margin.Do you support having this flexibility in the code?
Base: Australian fruit and vegetable growers n=441.

Support for contracting out some irrelevant parts of the code was stronger among those aware of most or all aspects of the code.

- There were some differences for support for contracting out parts of the code that may not be relevant, depending on grower characteristics. Interestingly, the more aware a grower is of aspects of the code of conduct, the more likely they are to support being able to contract out requirements from the code.

	TOTAL	Revenue			Member of grower representative organisation		Awareness of listed aspects of the code of conduct			
		Less than $2 million per annum	$2 million to $5 million per annum	More than $5 million per annum	Yes	No	Awareness of all areas of the code	Awareness of most areas of code	Awareness of some areas of code	Awareness no areas of the code/not aware of the code
Strongly support	24%	23%	17%	33%	22%	27%	33%	24%	17%	11%
Support	37%	38%	39%	29%	36%	40%	31%	44%	38%	30%
Neither support nor oppose	23%	23%	25%	25%	26%	17%	20%	22%	26%	26%
Oppose	4%	4%	8%	4%	6%	2%	5%	3%	5%	4%
Strongly oppose	5%	5%	7%	5%	6%	5%	8%	2%	6%	4%
Can't say	7%	8%	4%	4%	4%	9%	3%	5%	9%	26%

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q11. The Market Wholesaling sector also wants to ensure the mandatory Horticulture Code of Conduct allows growers and wholesalers the ability to contract out some requirements of the code if they are not relevant to them… How strongly do you support or oppose having this flexibility in the mandatory Horticulture Code of Conduct?
Note: Percentages may not add to 100% due to rounding.
Base: Australian fruit and vegetable growers n=441.

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Grower disputes with Market Wholesalers

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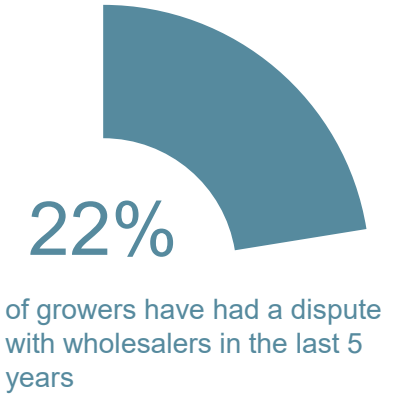
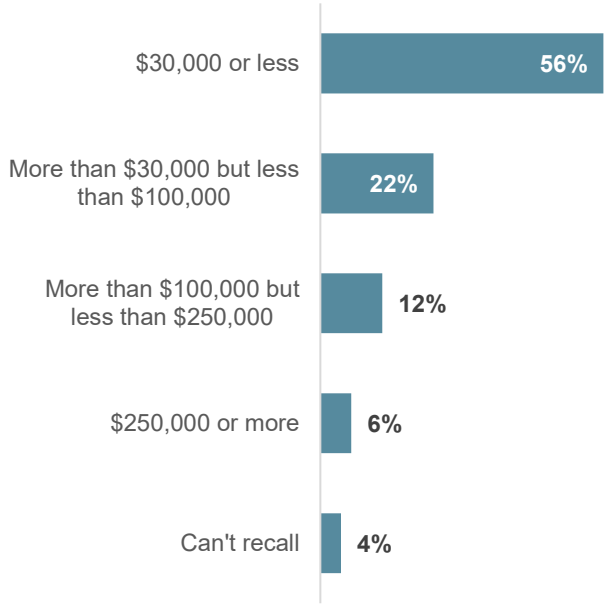
A little over one in five (22%) growers had a dispute in the last 5 years, with most (56%) of these disputes having a value of less than $30,000.

- Respondents were asked whether they'd had a dispute with a Market Wholesaler (i.e. this could relate to any/multiple Central Markets, not just the Brisbane Markets) in the last 5 years. Around one in five (22%) had, with the value of most disputes being less than $30,000.
- Growers whose business has an annual revenue of more than $2 million were significantly more likely to have had a dispute with Market Wholesalers (34%), as were growers who producer other products in addition to fruits and vegetables (28%).



Value of most recent dispute



Incidence of disputes by grower's revenue

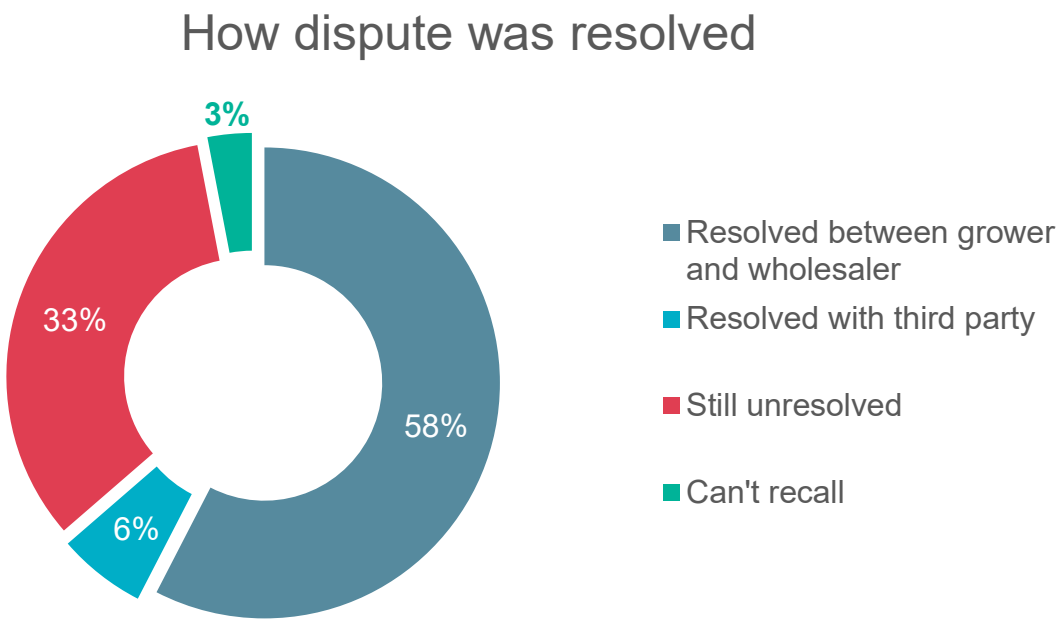
	TOTAL	Less than $2 million	$2 million to $5 million	More than $5 million
Had a dispute in last 5 years	22%	19%	34%	31%
Did not have a dispute in last 5 years	75%	80%	64%	65%
Can't recall	3%	1%	1%	4%

Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q12a. Have you had a dispute with a market wholesaler in the last 5 years?
Q12c. Still thinking about the most recent dispute you had with a market wholesaler. What was the value of the return price for this dispute?
Bases: Australian fruit and vegetable growers n=441, Australian fruit and vegetable growers who had a dispute with a wholesaler in last 5 years n=99.

Disputes between growers and wholesalers rarely required the assistance of a third party, with most being resolved between the two parties directly.

- Respondents who had had a dispute with a Market Wholesaler in the last 5 years were asked how their dispute was resolved. The majority (58%) said it was resolved directly with the wholesaler, while one in three (33%) said the dispute was still ongoing. Relatively few (6%) said it required the involvement of a third party.

- Sub-group analysis of how disputes were resolved is not possible, due to the small sample size of growers who had disputes.



Source: Brismark Survey of Fruit and Vegetable Growers 24 February-10 March 2026
Q12b. Thinking about the most recent dispute you had with a market wholesaler.How was the dispute resolved?
Base: Australian fruit and vegetable growers who had a dispute with a wholesaler in last 5 years n=99

For more information, please contact:

David Erickson, Senior Research Director
David.Erickson@roymorgan.com

Adam Ray, Senior Researcher
Adam.Ray@roymorgan.com

Alex Crowther, Senior Project Manager
Alex.Crowther@roymorgan.com

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