



# **Australian Horticulture Statistics Handbook 2020/21**

## **FRUIT**

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This Handbook is an analysis that combines all available data on production, international trade, processing volumes and fresh market distribution in order to produce statistics on 75 horticultural categories over the year ending 30 June 2021.

### Summary of Approach

The Handbook adopts a modelling approach that centres on determining the fresh market value and volume for each category, that reconciles production with local and international distribution channel throughputs. Fresh market supply volume is determined as follows:

#### Fresh Supply = Production - Fresh Exports - Processing + Fresh Imports

- Farm gate production quantity has been informed through a number of sources, including Hort Innovation funded data projects, horticultural government levy data where available, and refined through consultation with informed industry bodies. The corresponding value of production is calculated from wholesale pricing information, before removing known logistical, marketing and wholesale costs to reflect product value at the farm gate.
- Export and import trade volume and value is based on Australian Customs data as reported in IHS Global Trade Atlas data.
- Processing data has been obtained through consultation with industry processors<sup>1</sup>.

See pages 10 to 12 under 'research method' for a detailed description on this Handbook's methodology.

<sup>1</sup>Note that the \$ value of processing volumes has not been included in the analysis.

This publication covers the year ending 30 June 2021 and examines the production and distribution of horticulture products. Some of the key influences on horticultural production and distribution over this period are summarised below.

Production conditions from the adverse impacts of the previous year to allow for more stable production output. However, the management of COVID-19 spreading through the country dominated the year which impacted both production capacity and demand. Air travel was constrained and this impacted the number backpackers travelling to Australia, which in turn led to on farm labour shortages. The lack of household expenditure on both international and interstate travel flowed into other expenditure. This was reflected in strong growth in the nursery category as households were drawn into home renovations and or indoor greenlife to lift the working from home environment. Food distribution continued to be impacted by household spending moving between retail and food service channels. While there were periods of food service recovery, the channel remained exposed to quick share losses as lockdown restrictions were re-applied. Food service in CBD locations have been especially challenged by these impacts and as flexible working arrangements are embraced by more employers market conditions will continue to be challenged.

The wholesale value per kg of fresh fruit and vegetables supplied to the local market increased by **2%** to **\$2.78 per kg**. Total fresh horticulture exports were valued at **\$2.37 billion** in 2021/21, **-13%** lower than the previous year. The changes in export value was driven predominately by decreases in table grapes and almonds and increases in macadamias. Given current export market conditions and as we all deal with the far reaching COVID-19 impacts, this export performance reflects the strength of demand for Australian product.

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# Introduction

Availability of valid statistical information is a key enabler across horticulture. The Australian Horticulture Statistics Handbook for the year ending 30 June 2021 is presented by Horticulture Innovation Australia for the purpose of consolidating horticulture statistical information for use by horticulture industry members and other stakeholders.

The information sources for this publication have drawn on data available from the Australian Bureau of Statistics, Hort Innovation funded projects, international trade sources and horticulture industry representative bodies (IRBs) where available. In this publication these sources have been expanded to include and draw on household consumption and local market distribution channel information, as assessed by Freshlogic, to provide a reconciled profile of each supply chain.

Note that ‘Imports by state destination’ refers to the final destination of the product. ‘Exports by state of production origin’ refers to the state of origin where that product was produced.

Where additional information has led to a change in the previously quoted value from the 2019/20 edition for a category, this has been noted on the page of the relevant category.

Any comments regarding the Handbook should be forwarded to Hort Innovation at: [feedback@horticulture.com.au](mailto:feedback@horticulture.com.au)

The 2020/21 Handbook has been compiled by Freshlogic.

## Abbreviations

% YoY	% increase/decrease this year compared to last year
\$	Australian Dollars
\$b	Billion Australian Dollars
\$m	Million Australian Dollars
2020/21	Year ending 30 June 2021
ABS	Australian Bureau of Statistics
CIF	Cost of Insurance and Freight (a measure of import value)
FOB	Free On Board (a measure of export value)
g	Grams
GTA	Global Trade Atlas
kg	Kilograms
KWE	Kernel Weight Equivalent
ha	Hectares
ISWE	In-Shell Weight Equivalent
L	Litres
m <sup>2</sup>	Metres squared (a measure of area)
m m <sup>2</sup>	Million metres squared (a measure of area)
ML	Mega Litres (1 million litres)
N/A	Not Available
t	Tonnes (1 thousand kilograms)

### States

NSW	New South Wales
NT	Northern Territory
VIC	Victoria
QLD	Queensland
SA	South Australia
TAS	Tasmania
WA	Western Australia

### Countries

PNG	Papua New Guinea
UAE	United Arab Emirates
UK	United Kingdom
US	United States of America

## Definitions

**Category**—A particular horticultural commodity (e.g. bananas), or in some cases a combination of like commodities (e.g. the category ‘rubus berries’ covers raspberries and blackberries and other rubus).

**Production**—The volume in tonnes of the category that was grown in Australia over the year. This refers to production which was sold by the producer, either to the Australian fresh or processing markets, or to international trade markets. This does not cover any production that was not harvested, nor does it refer to any other forms of production of the category that do not enter these markets.

**Value of Production**—Sometimes referred to as ‘Farm Gate Value,’ this is the value of the production received by the producer.

**Processing Volume**—The volume in tonnes of the category that was sent to be processed, such as juicing, freezing or preserving.

**Fresh Exports**—The volume in tonnes of the production that was exported in a fresh form to other countries. Due to the way trade information is recorded, this may include some dried products, and will be marked as such where appropriate.

**Value of Fresh Exports**—The value in million dollars of the category’s fresh exports. This is recorded in FOB (Free on Board) dollars.

**Fresh Imports**—The volume in tonnes of the category that was imported into Australia from another country in a fresh form.

**Value of Fresh Imports**—The value in million dollars of the category’s fresh imports. This is recorded in CIF (Cost of Insurance and Freight) dollars.

**Fresh Supply**—The volume in tonnes of the category that was available to the Australian market in a fresh form. Volume supplied to the fresh market is typically either sold at retail or supplied to food service outlets. The Hort

**Wholesale Value**—The value in million dollars of the fresh supply at a wholesale market level, inclusive of net international trade flows. Wholesale values have been been *Note that the Wholesale value is distinct from the Gross Value of Production tracked by the ABS, as that measure includes value of processing and exported product, and does not include imported product.*

**In-Shell (Nut categories)**—A measure of volume that includes the weight of the inedible shell around the kernel.

**Kernel (Nut categories)**—A measure of volume that only includes the edible kernel.

**Crack Out Yield (Nut categories)**—The percentage of edible kernel obtained from the in-shell volume during the cracking process.

## Definitions

**Retail**— The retailers who sell fruit and vegetables to consumers. This encompasses all forms of retailing including; supermarkets, greengrocers, farmers markets, specialty food stores and online offers.

**Food Service**— The enterprises who use fruit and vegetables as an ingredient in assembling meals. This encompasses all forms of meal provision including; restaurants, cafes, fast food, hotels, travel and event providers, hospitals, schools and other similar institutions.

## Research Method

### Overview

This publication has gathered all available horticultural information and aligned it into supply chain profiles for each of the horticultural categories covered. The approach for each horticultural category has been to quantify available production, volumes processed, volumes exported and imported, and to then confirm that the resulting fresh volume supplied aligns with the Australian market distribution channels (primarily the retail and foodservice channels). This volume of fresh supply available to the Australian fresh marketplace is defined using the equation:

$$\text{Fresh Supply} = \text{Production} - \text{Fresh Exports} - \text{Processing} + \text{Fresh Imports}$$

The distribution channel modelling has drawn upon Freshlogic's THRUChain modelling system to ensure that fresh supply accommodates the sum volumes distributed by retail and food service channels. In the process of this modelling, information has been gathered from a number of supply chain sources and aligned with household consumer purchase metrics. The primary outputs are designed around aligned supply chains that map the distribution of total production. This design was used to deliver the most informed and accurate profiles and the outputs have been further confirmed by conferring with Industry Representative Bodies. The larger Industry Representative Bodies have advanced supply chain information systems in place and the outputs from these systems have been accessed to provide data inputs and validate findings.

In calculating the **production** and **volume processed**, a number of data sources have been relied upon. Where available and in most instances, this has been

## Research Method

guided by information from Australian government horticultural levies, and refined through consultation with the Industry Representative Bodies and major trading stakeholders (such as processors, wholesalers and distributors) for the particular category.

Information on Australia's **imports and exports** of fresh and processed horticultural commodities has been compiled using the Global Trade Atlas®, an online global trade information database owned and operated by IHS Markit. Information on Australian trade in the Global Trade Atlas® has been compiled from information provided to the Australian Customs and Border Protection Service. The Import and Export analysis tables for each category identify the import source country under "Imports by country" and the export destination country under "Export by country".

Information on **wholesale value** has been modelled using wholesale pricing information from *Ausmarket Consultants* and the *Chamber of Fruit and Vegetable Industries in Western Australia*. This information has been used to define the **Value of Production** by removing known logistical, marketing and wholesale costs to calculate the value of categories to producers at farm gate.

Information on the **retail and food service channels** is defined by separating the fresh market total volume arrived at by the Freshlogic's THRUchain modelling system, into two channels. Retail volumes are defined to accommodate the total volume of household purchases of fruit and vegetables. The resulting food service volumes are then validated with a network of food service providers. The values of product sold for both channels are based on the wholesale prices.

**Consumer information** including percent of households purchasing a category, and average purchase quantities, has been sourced from Freshlogic's *Mealpulse™* consumer survey and *DocketData™* systems. Supply per capita has been calculated as total volume of fresh supply divided by population for the year ending June 2021 according to the ABS. The number of occupied households is assumed at 9.15 million and the population at 25.8 million for the 2020/21 year\*.

## **Research Method**

Data on **production area** and **number of trees** has been gathered from Industry Representative Bodies and the ABS Agricultural Commodities publications\*\*. *This information has been included for indicative purposes only, and should be viewed as such.*

Information on **major growing regions** has been sourced both from the ABS Agricultural statistics, and through consultation with the major Industry Representative Bodies. These sources have also been used to profile seasonality and production volumes by state and by main variety of the category. *Note the information on volume by state and main variety has been included for illustrative purposes, and actual volumes may be within 10-25% of the listed volume.*

Throughout the document when data sources have been relied upon, this has been noted. Some of the more common sources have been abbreviated. The full list of sources has been provided on pages 22 and 23.

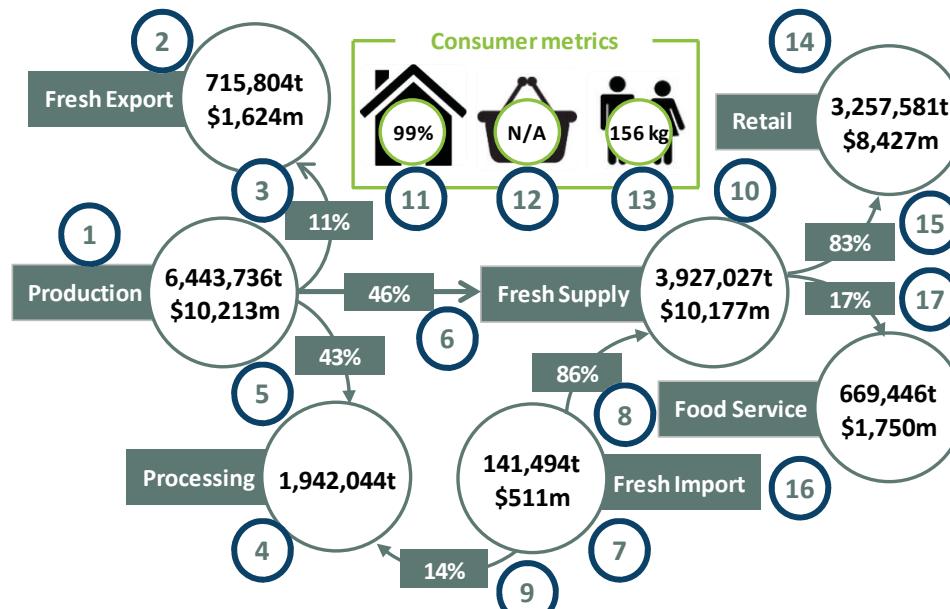
\*ABS, Australian Demographic Statistics cat. no. 3101.0

\*\*ABS, Agricultural Commodities cat. no. 7121.0

This section outlines how to interpret the various graphs, tables and supply chain models used to profile each of the horticultural commodities covered in this handbook.

## Fresh supply chain—Fruit and Vegetables

This example supply chain outlines the flow of a fruit or vegetable category over the year ending June 2021. It contains the following elements:

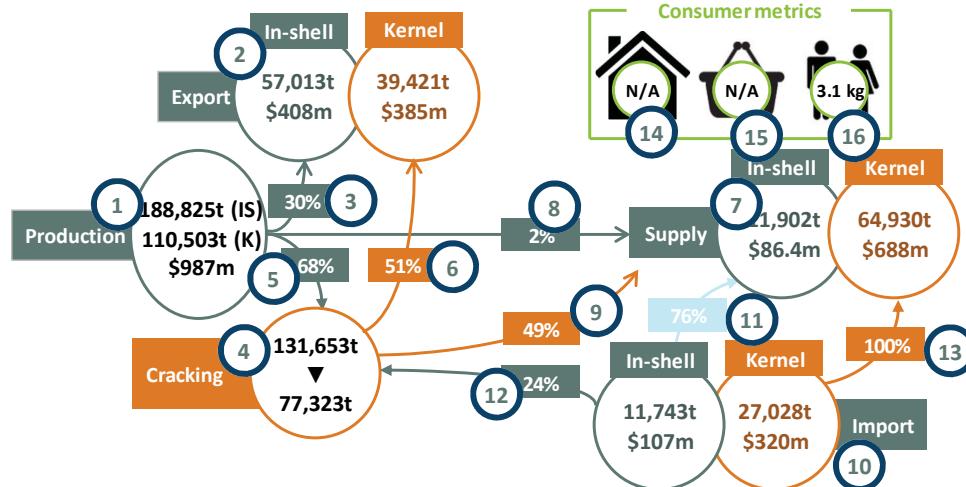


1. **Production.** This is the volume of the category grown in Australia over the year ending June 2021. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
2. **Fresh Exports.** The volume in tonnes of the production that was exported in a fresh form, and the value in million dollars received.
3. **Export Share.** The percentage share of production that was exported.
4. **Processing.** The volume in tonnes of the production that was sent to be processed (such as juicing, freezing or preserving etc).
5. **Processing Share.** The percentage share of production that was processed.

6. **Fresh Supply Share.** The percentage share of production that was sent to the Australian fresh market.
7. **Fresh Imports.** The volume in tonnes of the category that was imported in a fresh format from another country, and the value in million dollars paid to import.
8. **Import Fresh Supply Share.** The percentage share of fresh imports that was sent to the Australian fresh market.
9. **Import Processing Share.** The percentage share of fresh imports that was sent to be processed.
10. **Fresh Supply.** The volume of the category available to the Australian fresh market. It includes both Production that was sold into the fresh market, as well as Fresh Imports that were sold into the fresh market. This profiles the **Fresh Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Fresh Supply at a wholesale market level.
11. **Household Penetration.** The percentage of Australian households who bought the category at least once at retail, to be consumed either in or out of the home, over the year ending June 2021. ‘Out of home’ consumption is food prepared away from the home typically via food service channels and not prepared from ingredients purchased via retail.
12. **Average Purchase Quantity.** The average quantity purchased at retail per shopping trip by Australian households over the year ending June 2020. A shopping trip refers to a trip where this category is purchased.
13. **Fresh Supply per Capita.** The volume of fresh supply available to the Australian population, on a per capita basis.
14. **Retail.** The volume of the category that went into the Australian retail market. This profiles the Retail Volume (volume in tonnes), and the Retail Wholesale Value in million dollars, which is the value of the Retail at a wholesale market level.
15. **Retail Share.** The percentage of fresh supply that was sent to the Australian fresh Retail market.
16. **Food Service.** The volume of the category that went into the Australian food service market. This profiles the Food Service Volume (volume in tonnes), and the Food Service Wholesale Value in million dollars, which is the value of Food Service at a wholesale market level.
17. **Food Service Share.** The percentage of fresh supply that was sent to the Australian fresh Food Service market.

## Supply chain—Nuts & Olives

This example supply chain outlines the flow of a nut category over the year ending June 2021. Because nuts are sold both in an *In-Shell* and *Kernel* format, the nut supply chain profiles both elements, indicated by *green* for *In-Shell* and *orange* for *Kernel*. The chain contains the following elements:



- Production.** This is the volume of the category grown in Australia over the year ending June 2021. This profiles the **Production** (volume in tonnes), in both *In-Shell* (written in *green* and denoted by *IS*) and the *Kernel* equivalent of this volume after cracking (written in *orange* and denoted by *K*), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**.
- Exports.** The volume in tonnes of the production that was exported, and the value in million dollars received. This profiles both *In-Shell* exports and *Kernel* exports.
- In-Shell* Export Share.** The percentage share of *In-Shell* production that was exported.
- Cracking.** The volume in tonnes of the *In-Shell* production and imported *In-Shell* product that was sent to be cracked so as to produce kernel. This profiles both the *In-Shell* volume in, and the *Kernel* volume out.
- Cracking Share.** The percentage share of *In-Shell* production that was cracked.

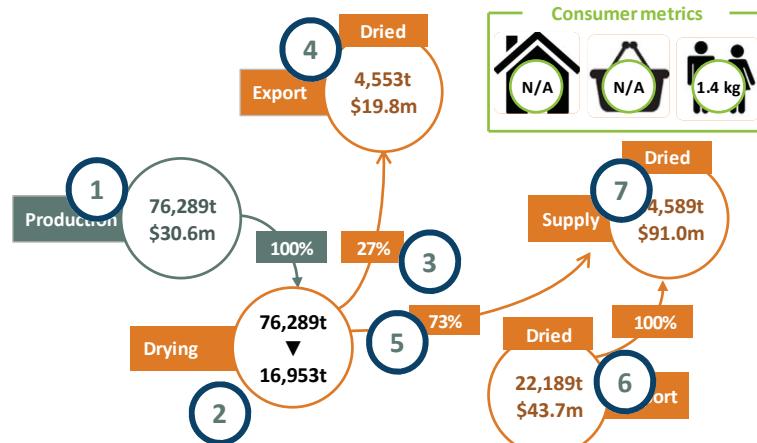
- Kernel* Export Share.** The percentage share of cracked *Kernel* that was exported.
- Supply.** This is the volume of the category available to the Australian market. It includes both Production that was sold into the market, as well as Imports that were sold into the market. This profiles the **Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Supply at a wholesale market level. It covers both *In-Shell* and *Kernel* supply.
- In-Shell* Supply Share.** The volume in tonnes of the *In-Shell* Production that was supplied to the market.
- Kernel* Supply Share.** The volume in tonnes of cracked *Kernel* that was supplied to the market.
- Imports.** The volume in tonnes of the category that was imported from another country, and the value in million dollars paid to import. Profiles both *In-Shell* and *Kernel* imports.
- In-Shell* Import Supply Share.** The percentage share of *In-Shell* imports that was sent to the Australian market.
- In-Shell* Import Cracking Share.** The percentage share of *In-Shell* imports that was sent to be cracked.
- Kernel* Import Supply Share.** The percentage share of *Kernel* imports that was sent to the Australian market.
- Household Penetration.** The percentage of Australian households who bought the category at least once at retail, to be consumed either in or out of the home, over the year ending June 2021. See page 15 for full definition.
- Average Purchase Quantity.** The average quantity purchased at retail per shopping trip by Australian households over the year ending June 2021. A shopping trip refers to a trip where this category is purchased.
- Fresh Supply per capita.** The volume of fresh supply available to the Australian population.

*Note: Supply into retail and food service are not reported for Nuts & Olives.*

*Note: Olives (fruit) uses the same supply chain format as nuts. However, instead of an in-shell form, the supply chain refers to table olives, and instead of a kernel form, the supply chain refers to olive oil. The term "Cracking" is also replaced with "Oil Production".*

## Processed supply chain—Dried/Canned Fruit

This example supply chain outlines the flow of the three dried/canned fruit categories over the year ending June 2021. It contains the following elements:



1. **Production.** The volume of the category grown in Australia over the year ending June 2021. This profiles the **Fresh Production** (written in green) and as well as the value in million dollars obtained by the producers i.e. the **Value of Production**.
2. **Drying/Canning.** The volume in tonnes of the **Fresh** production that was sent to be processed. This profiles both the **Fresh** volume in, and the **Processed** volume out (written in orange).
3. **Export Share.** The percentage share of **Processing** that was exported.
4. **Dried/Canned Exports.** The volume in tonnes of the **Processing** that was exported in a **Processed** form, and the value in million dollars received.
5. **Supply Share.** The percentage share of **Processing** that was sold locally.
6. **Dried/Canned Imports.** The volume in tonnes of imported **Processed** product, and the value in million dollars paid to import.
7. **Supply.** This profiles the **Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Supply at a wholesale market level. It includes both **Processed** production that was sold into the market, as well as **Processed** Imports that were sold into the market.

*Note: Supply into retail and food service are not reported for Dried & Canned Fruit.*

## Data Tables

These tables are provided for each category. They profile key elements over the last three years (for the years ending June 2019, June 2020 and June 2021), as well as the percentage change in value year on year. They contain:

Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	208,277	214,660	+3%	198,389	-8%
Production (\$m)	\$ 693.2	\$ 750.4	+8%	\$ 631.8	-16%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	146,093	152,180	+4%	120,725	-21%
Fresh Export Value (\$m)	\$ 555.2	\$ 622.9	+12%	\$ 460.7	-26%
Fresh Import Volume (t)	16,809	16,364	-3%	12,033	-26%
Fresh Import Value (\$m)	\$ 81.3	\$ 85.1	+5%	\$ 58.9	-31%
Fresh Supply (t)	78,993	78,843	>-1%	89,697	+14%
Fresh Supply Wholesale Value (\$m)	\$ 330.8	\$ 328.1	>-1%	\$ 326.3	>-1%
Supply per Capita (kg)	3.13	3.06	-2%	3.48	+14%
Retail Supply (t)	75,231	75,448	<1%	85,425	+13%
Retail Supply Wholesale Value (\$m)	\$ 315.0	\$ 314.0	>-1%	\$ 310.8	-1%
Food Service Supply (t)	3,762	3,395	-10%	4,271	+26%
Food Service Wholesale Value (\$m)	\$ 15.8	\$ 14.1	-10%	\$ 15.5	+10%

- **Production.** The volume of the category grown in Australia.
- **Value of Production.** The value of the production over the year.
- **Production Area/Number of Trees/Vines.** A measure of the growing area of the category (in hectares), or the number of trees/vines used to grow the category over the year. This data has been gathered from the Australian Bureau of Statistics Agricultural Statistics information, the largest survey of growers available. *This information has been included for indicative purposes only, and should be viewed as such.*
- **Export Volume and Value.** The volume in tonnes and the value in million dollars of the category exported in a fresh form over the year.
- **Import Volume and Value.** The volume in tonnes and the value in million dollars of the category imported in a fresh form over the year.
- **Supply.** The volume in tonnes of the category made available to the local Australian fresh market, including locally grown product and imported fresh product.

## *How to use this book*

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- **Wholesale Value.** The value in million dollars of the supply at a wholesale market level.
- **Supply per capita.** The volume available to the Australian public. Calculated as the volume supply divided by the population for the year.
- **Retail Supply Volume and Value.** The volume in tonnes and the value in million dollars of the category that went into the Australian retail market in a fresh form over the year.
- **Food Service Volume and Value.** The volume in tonnes and the value in million dollars of the category that went into the Australian food service market in a fresh form over the year.

## Research Method

## Research Method

### Common Data Sources

<u>Abbreviation</u>	<u>Data Source</u>	<u>Further information</u>
<b>ABS</b>	<i>Agricultural Commodities</i> , Australian Bureau of Statistics	Information from <i>Agricultural Commodities cat. no. 7121.0, 2020-19, 2019-18, 2017-18, 2016-17, 2015-16, 2014-15 and 2013-14 editions has been compiled.</i> <i>Australian Demographic Statistics cat. no. 3101.0 June 2020 edition.</i> <i>2016 Census of Population and Housing</i>
<b>AC</b>	Ausmarket Consultants	Wholesale pricing information from the Adelaide, Brisbane, Melbourne and Sydney wholesale markets.
<b>CFVIWA</b>	Chamber of Fruit and Vegetable Industries of Western Australia	Wholesale pricing information from the Perth wholesale market.
<b>Freshlogic Analysis</b>	THRUCHain analysis—Freshlogic	Supply chain modelling system that aligns the volumes of production and international trade with the volumes distributed through processing and all domestic market channels.
<b>GTA</b>	IHS —Global Trade Atlas®	<a href="http://www.gtais.com/gta">www.gtais.com/gta</a>

<u>Abbreviation</u>	<u>Data Source</u>	<u>Further information</u>
<b>IRB</b>	Industry Representative Bodies	Consultation with informed bodies to ensure information reconciles. The abbreviation 'IRB' is listed where multiple industry bodies were contacted for a category/group. Where one industry body was contacted for an individual category, the relevant name is listed.
<b>MP &amp; DD</b>	Mealpulse™ panel and DocketData™	Freshlogic operated information gathering tools that provide the detail of household purchasing behaviours and a basis to reconcile supply with Australian market distribution channels.

### List of projects

In addition to common data sources, a number of Hort Innovation funded projects have provided data outputs which have informed the information provided in this handbook. These are outlined in the table below. Hort Innovation would like to acknowledge their input.

<u>Project Code</u>	<u>Project Title</u>
<b>AL19005 (Almonds)</b>	<i>Australian Almond Industry Statistics and Data collection 2020-2022</i>
<b>AP16002 (Apple/Pear)</b>	<i>Apple and Pear Crop Estimate</i>
<b>AV20000 (Avocado)</b>	<i>Avocado industry and market data capture and analysis</i>
<b>CT18002 (Citrus)</b>	<i>Citrus Market Development; Market Access and Quality</i>
<b>CU15000 (Custard Apple)</b>	<i>Custard Apple Dispatch System 2—CADS 2</i>
<b>MC18003 (Macadamias)</b>	<i>Macadamia Crop Forecasting 2020-2022</i>
<b>MG17000 (Mangoes)</b>	<i>Building best management practice capacity for the Australian mango industry</i>
<b>MT15031 (Dried Grapes)</b>	<i>Australian Dried Fruit Communications Program</i>
<b>NY21000 (Nursery)</b>	<i>Nursery Industry Statistics 2020/21 to 2024/25</i>
<b>OL16001 (Olives)</b>	<i>Australian Olive Industry Benchmarking Program</i>
<b>PI17001 (Pineapples)</b>	<i>Pineapple integrated crop protection program</i>

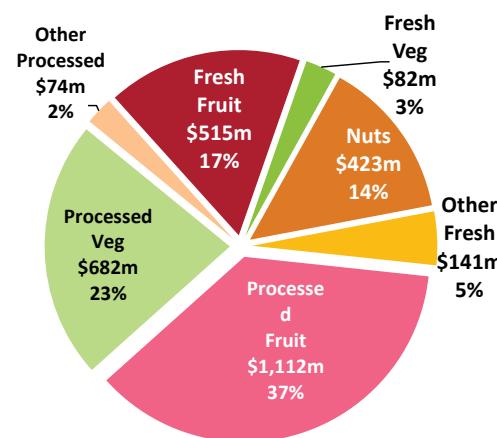
<u>Project Code</u>	<u>Project Title</u>
<b>TU21000 (Turf)</b>	<i>Turf industry statistics 2020/21 to 2024/25</i>
<b>TM17000 (Tomatoes)</b>	<i>Processing Tomato Industry capacity building</i>
<b>VG15077 (Vegetables)</b>	<i>Financial Performance of Australian Vegetable farms 2016-2017 to 2018-2019</i>



## International Trade—Total Imports

### Total Imports

For the year ending June 2021, Australia imported **\$3.03 billion** worth of horticultural products. *The values below do not include wine grapes.* Processed fruit was the largest value import grouping. The value of imports by group is profiled in the chart and table below. The table below also includes the **top 3** import categories by value within each group. The value for nuts includes some processed nut products.



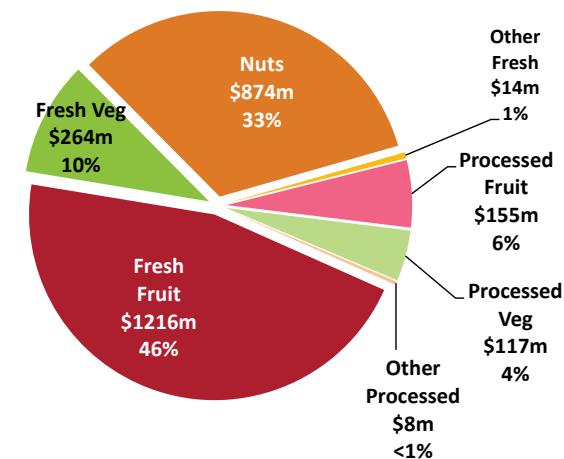
Sources: GTA; (Freshlogic Analysis)

<b>Fresh Fruit</b>	<b>\$515.2m</b>	<b>Other Fresh Horticulture</b>	<b>\$141.5m</b>
Avocados	\$184.7m	Cut Flowers	\$95.4m
Kiwifruit	\$74.8m	Live Plants	\$25.0m
Table Grapes	\$58.9m	Bulbs	\$20.9m
<b>Fresh Vegetables</b>	<b>\$82.3m</b>	<b>Processed Fruit</b>	<b>\$1,111.7m</b>
Garlic	\$25.9m	Olives and Olive Oil	\$244.2m
Asparagus	\$19.3m	Dried Tree Fruits	\$68.9m
Mushrooms	\$14.1m	Dried Grapes	\$58.4m
<b>Nuts</b>	<b>\$422.8m</b>	<b>Processed Vegetables</b>	<b>\$682.2m</b>
Cashews	\$141.5m	Potatoes	\$198.8m
Walnuts	\$38.3m	Tomatoes	\$146.5m
Hazelnuts	\$37.3m	Beans	\$66.0m

## International Trade—Total Exports

### Total Exports

For the year ending June 2021, Australia exported **\$2.65 billion** worth of horticultural products. Fresh fruit was the largest value export grouping. The value of exports by group is profiled in the chart and table below. The table below also includes the top 3 export categories within each group. *These values do not include wine grapes.*



Sources: GTA; (Freshlogic Analysis)

<b>Fresh Fruit</b>	<b>\$1,216.4m</b>	<b>Other Fresh Horticulture</b>	<b>\$14.3m</b>
Table Grapes	\$460.7m	Cut Flowers	\$7.9m
Oranges	\$285.1m	Live Plants	\$6.0m
Mandarins	\$143.8m	Bulbs	\$0.3m
<b>Fresh Vegetables</b>	<b>\$264.0m</b>	<b>Processed Fruit</b>	<b>\$154.7m</b>
Carrots	\$97.0m	Dried Grapes and Grape Juice	\$40.8m
Potatoes	\$31.1m	Olives and Olive Oil	\$23.1m
Onions	\$30.4m	Orange Juice	\$7.5m
<b>Nuts</b>	<b>\$873.9m</b>	<b>Processed Vegetables</b>	<b>\$117.2m</b>
Almonds	\$545.1m	Potatoes	\$26.2m
Macadamias	\$276.1m	Tomatoes	\$31.7m
Walnuts	\$19.1m	Ginger	\$4.4m



## Imports of fresh horticultural products by region

These pages profile total imports of **fresh** horticultural products by 7 world regions. For each region, the total imports of fresh products is profiled, as well as up to the top 10 products **by value**, on products where imports exceed \$1 million.

**Asia\*** ..... 55,554t (\$409.4m)

Cashews .....	17,708t (\$140.0m)	Mushrooms .....	4,301t (\$13.8m)
Cut Flowers* .....	(\$53.3m)	Walnuts .....	871t (\$8.5m)
Coconuts .....	14,661t (\$36.6m)	Pistachios .....	299t (\$7.0m)
Live Plants* .....	(\$24.1m)	Mangoes .....	746t (\$5.2m)
Garlic .....	8,159t (\$15.4m)	Apples .....	1,7271t (\$4.7m)

**Middle East\*** 2,885t(\$16.7m)

Pistachios.....	320t (\$3.8m)
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**Africa** ..... 4,830t (\$24.0m)

Cut Flowers* .....	(\$14.7m)
Lemons/Limes ...	2,169t (\$3.4m)
Oranges .....	1,166t (\$1.3m)
Garlic .....	285t (\$1.2m)
Mandarins .....	378t (\$0.9m)

**Total Imports\*\*** ..... 194,912t (\$1,161.8m)

Avocados .....	28,027t (\$184.7m)	Live Plants* .....	(\$46.1m)
Cashews .....	17,939t (\$141.6m)	Walnuts .....	4,771t (\$38.3m)
Cut Flowers* .....	(\$95.4m)	Coconuts .....	15,633t (\$37.5m)
Kiwifruit .....	23,724t (\$74.8m)	Hazelnuts .....	3,171t (\$37.3m)
Grapes .....	12,032t (\$58.9m)	Blueberries .....	1,530t (\$32.2m)

Source: GTA

\*Flower and nursery imports are recorded by each rather than weight, and so tonnes of these categories are not included in totals.

\*\*Total includes imports with no specified country.

The relative share of the **value** of imports from each of the 7 regions is also profiled in the circle associated with each region. Note that the total value and volume for all regions (located at the bottom left of the page) includes import information with no specified country, and therefore may exceed the sum of the individual regions.

**North America\*** ..... 48,803t (\$261.4m)

Grapes.....	11,969t (\$58.5m)	Cherries.....	1,344t (\$14.3m)
Oranges.....	12,768t (\$29.6m)	Summerfruit .....	1,989t (\$12.2m)
Walnuts .....	3,635t (\$27.5m)	Pistachios .....	840t (\$10.4m)
Asparagus .....	3,097t (\$19.2m)	Mandarins .....	2,557t (\$9.1m)
Lemons/Limes 2,273t (\$20.8m)		Almonds .....	718t (\$4.5m)

**Central & South America\*** ..... 4,523t

(\$50.6m)
Cut Flowers* .....
Avocados .....
Brazil Nuts .....
Garlic .....
Walnuts .....

**New Zealand + Oceania\*** ..... 49,926t (\$282.9m)

Avocados .....	25,509t (\$171.7m)	Persimmons .....	321t (\$2.0m)
Kiwifruit .....	18,298t (\$57.1m)	Cut Flowers* .....	(\$1.4m)
Blueberries .....	1,506t (\$32.2m)	Almonds .....	174t (\$1.2m)
Capsicums .....	643t (\$3.0m)	Coconuts .....	971t (\$0.9m)
Live Plants* .....	(\$2.3m)	Summerfruit .....	119t (\$0.6m)



## Exports of fresh horticultural products by region

These pages profile total exports of **fresh** horticultural products by 6 world regions. For each region, the total exports of fresh product is profiled, as well as up to the top 10 products **by value**, on products where exports exceed \$1 million.

Asia*	505,971t (\$1,870.7)
Grapes.....	113,661t (\$435.6m)
Almonds.....	67,599t (\$366.0m)
Macadamias.....	22,132t (\$256.6m)
Oranges.....	150,708t (\$252.6m)
Mandarins.....	41,988t (\$106.5m)
Cherries.....	4,408t (\$78.2m)
Carrots.....	38,733t (\$35.5m)
Nectarines.....	7,669t (\$31.7m)
Plums.....	7,003t (\$29.0m)
Potatoes.....	34,221t (\$27.3m)

Middle East*	95,800t (\$161.5m)
Carrots.....	66,959t (\$58.8m)
Almonds.....	3,641t (\$24.7m)
Summerfruit....	2,735t (\$12.1m)
Mandarins.....	5,474t (\$10.6m)
Grapes.....	2,667t (\$9.4m)
Oranges.....	8,413t (\$8.8m)
Macadamias.....	219t (\$6.0m)
Mangoes.....	933t (\$5.4m)
Watermelons....	1,611t (\$4.5m)
Strawberries.....	408t (\$3.6m)

Total Exports**	761,538t (\$2,368.3m)
Almonds.....	96,392t (\$545.1m)
Grapes.....	120,825t (\$460.7m)
Macadamias....	24,783t (\$323.8m)
Oranges.....	172,416t (\$285.1m)
Mandarins.....	59,563t (\$143.8m)
Carrots.....	108,356t (\$97.0m)
Summerfruit 20,983t	(\$92.01m)
Cherries.....	4,715t (\$82.4m)
Potatoes.....	37,274t (\$31.1m)
Onions.....	44,873t (\$30.4m)

Source: GTA

\*Flower and nursery exports are recorded by each rather than weight, and so tonnes of these categories are not included in totals.

\*\*Total includes exports with no specified country.

The relative share of the **value** of exports to each of the 6 regions is also profiled in the circle associated with each region. Note that the total value and volume for all regions (located at the bottom left of the page) includes export information with no specified country, and therefore may exceed the sum of the individual regions.

Europe*	26,986t (\$184.6m)
Almonds.....	18,425t (\$117.6m)
Macadamias....	1,151t (\$29.6m)
Walnuts.....	5,521t (\$17.9m)
Onions.....	11,785t (\$8.2m)
Live Plants*	(\$2.8m)
Mushrooms.....	5t (\$2.3m)
Cut Flowers*	(\$1.9m)
Apples.....	619t (\$1.3m)

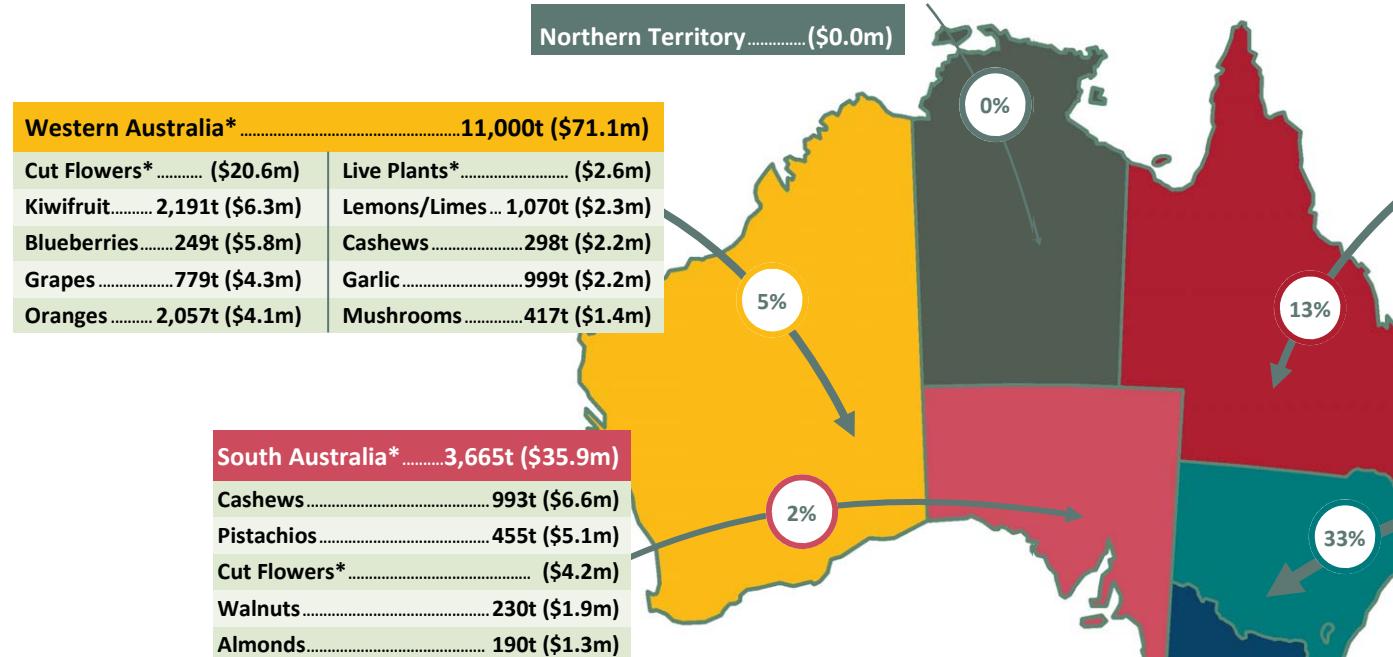
North America*	23,209t (\$90.5m)
Macadamias 1,150t	(\$29.3m)
Mandarins...6,499t	(\$15.7m)
Oranges....7,849t	(\$15.0m)
Almonds.....3,203t	(\$8.8m)
Pears.....1,768t	(\$2.9m)
Cherries.....109t	(\$1.8m)
Mangoes.....233t	(\$1.5m)
Nectarines.....270t	(\$1.4m)
Lemons/Limes....663t	(\$1.3m)
Cut Flowers*	(\$1.2m)

New Zealand + Oceania*	30,278t (\$102.0m)
Almonds.....2,227t	(\$20.2m)
Grapes.....4,042t	(\$14.5m)
Mandarins....5,338t	(\$10.5m)
Oranges.....5,239t	(\$8.2m)
Beans.....1,363t	(\$6.2m)
Pears.....4,113t	(\$6.2m)
Mangoes.....1,051t	(\$4.5m)
Strawberries.....592t	(\$3.8m)
Macadamias.....111t	(\$2.0m)
Carrots.....1,777t	(\$1.9m)



## Imports of fresh horticultural products by state

These pages profile total imports of **fresh** horticultural products by Australian state or territory. The total imports of fresh products is profiled for each state. And the text box at the bottom left of the page depicts the top 10 products **by value**, for products where imports exceed \$1million.

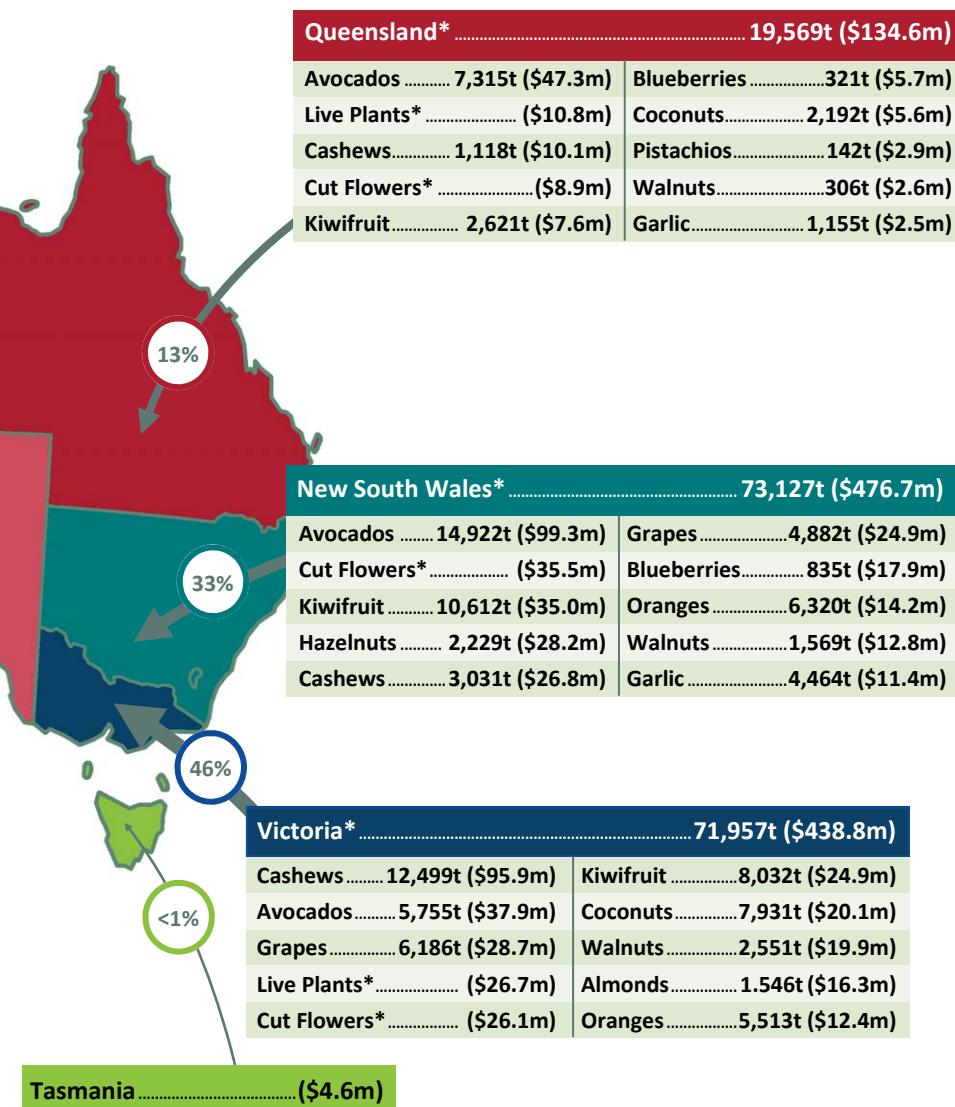


Source: GTA

\*Flower and nursery imports are recorded by each rather than weight, and so tonnes of these categories are not included in totals.

\*\*Total includes imports with no specified state.

The relative share of the **value** of imports to each of the states is also profiled in the circle associated with each region. Note that the total value and volume for all states (located at the bottom left of the page) includes import information with no specified state, and therefore may exceed the sum of the individual states.





## Exports of fresh horticultural products by state

These pages profile total exports of **fresh** horticultural products by Australian state or territory of production. The total exports of fresh products is profiled for each state. And the text box at the bottom left of the page depicts the top 10 products **by value**, for products where exports exceed \$1million.

<b>Northern Territory...</b>	<b>560t (\$2.6m)</b>
Mangoes.....	411t (\$2.1m)

<b>Western Australia.....</b>	<b>112,511t (\$153.9m)</b>
Carrots.....	96,848t (\$84.8m)
Strawberries.....	2,548t (\$19.0m)
Potatoes.....	4,729t (\$7.0m)
Onions.....	8,907t (\$6.2m)
Oranges.....	3,449t (\$5.3m)
Mushrooms.....	8,174t (\$5.0m)
Muskmelons.....	2,565t (\$4.1m)
Celery.....	2,943t (\$3.7m)
Cut Flowers*.....	(\$3.3m)
Avocados.....	237t (\$2.5m)

<b>South Australia.....</b>	<b>100,332t (\$313.0m)</b>
Almonds.....	22,647t (\$151.3m)
Oranges.....	57,724t (\$96.1m)
Mandarins...14,977t (\$28.5m)	
Potatoes.....	17,762t (\$14.3m)
Onions.....	12,126t (\$8.0m)
Lemons/Limes.....	1,567t (\$2.8m)
Cherries.....	163t (\$2.6m)
Summerfruit.....	303t (\$2.1m)
Grapefruit.....	1,199t (\$1.9m)

<b>Total Exports** .....</b>	<b>761,538t (\$2,368.3m)</b>
Almonds.....	96,392t (\$545.1m)
Grapes.....	120,725t (\$460.7m)
Macadamias....24,783t (\$323.8m)	
Oranges.....	172,416t (\$285.1m)
Mandarins.....	59,562t (\$143.8m)
Carrots.....	108,356t (\$97.0m)
Summerfruit...20,983t (\$92.1m)	
Cherries.....	4,714t (\$82.4m)
Potatoes.....	37,274t (\$31.1m)
Onions.....	44,873t (\$30.4m)

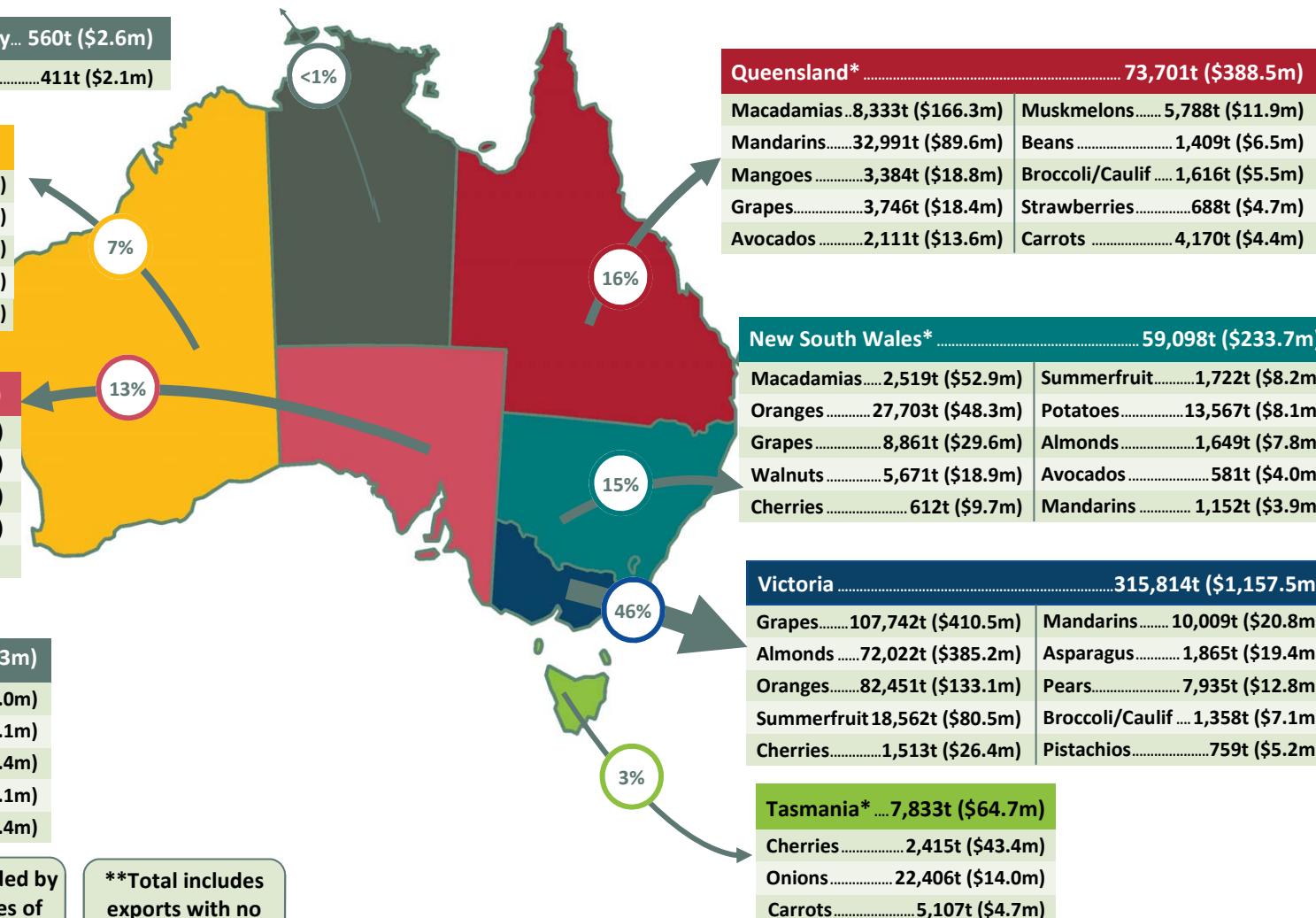
Source: GTA

\*Flower and nursery exports are recorded by each rather than weight, and so tonnes of these categories are not included in totals.

\*\*Total includes exports with no specified state.



The relative share of the **value** of exports from each of the states is also profiled in the circle associated with each region. Note that the total value and volume for all states (located at the bottom left of the page) includes export information with no specified state, and therefore may exceed the sum of the individual states.





## Data Tables—Production

### Production Volume

The table below summarises the **Production** in **tonnes** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Production (t)
All Horticultural Products	6,629,506
<b>All Fruit</b>	<b>2,542,439</b>
Apples	280,273
Avocados	78,085
Bananas	402,982
Berries - Combined	112,326
Blueberries	23,452
Rubus Berries	11,123
Strawberries	77,751
Cherries	20,074
Citrus - Combined	708,827
Grapefruit	11,792
Lemons/Limes	59,838
Mandarins	163,499
Oranges	473,697
Custard Apples	1,836
Kiwifruit	6,933
Lychees	2,283
Mangoes	51,528
Melons - Combined	182,572
Muskmelons	67,598
Watermelons	114,975
Nashi	1,100

Sources: ABS; GTA; IRB; MP & DD (Freshlogic Analysis)

Year Ending June 2021	Production (t)
Passionfruit	5,085
Papaya/Pawpaw	18,330
Persimmons	2,767
Pears	124,338
Pineapples	71,084
Summerfruit - Combined	124,878
Apricots	6,136
Nectarines/Peaches	85,819
Plums	32,924
Table Grapes	198,389
Processing Fruit Combined*	203,545
Dried Grapes	13,037
Prunes*	7,057
Other Dried Tree Fruit*	2,032
Canned Fruit*	51,420
Olives	130,000
Other Fruit	5,712
<b>All Vegetables</b>	<b>3,831,301</b>
Artichokes	456
Asparagus	6,857
Beans	35,641
Beetroot	14,044
Broccoli/Baby Broccoli	80,264

## Data Tables—Production

\*Note: The processed fruit lines marked with an asterisk (\*) do not contribute to total fruit production, as they have been counted towards the total in their respective categories (eg production of canning pineapples are already counted in the pineapple category). The exceptions are dried grapes, which is not a part of the table grapes category, and olives, which is not part of another fruit category.

Year Ending June 2021	Production (t)
Brussels Sprouts	6,263
Cabbage	59,635
Capsciums	81,735
Carrots	335,527
Cauliflower	84,350
Celery	65,043
Chillies	2,064
Cucumbers	90,998
Eggplant	9,177
Eng. Spinach/Silverbeet/Kale	6,925
Fresh Herbs - Combined	13,802
Fennel	1,380
Parsley and Other Herbs	12,422
Garlic	3,406
Ginger	5,184
Leafy Asian Vegetables	30,547
Leafy Salad Vegetables	74,571
Leeks	11,099
Head Lettuce	139,023
Mushrooms	68,936
Onions	271,930
Parsnips	3,538
Peas	35,248

Year Ending June 2021	Production (t)
Potatoes	1,458,991
Pumpkins	115,982
Sweet Corn	77,090
Sweetpotatoes	104,206
Tomatoes	472,209
Zucchini	41,399
<i>Other Vegetables</i>	<i>25,160</i>
<b>All Nuts</b>	<b>255,766</b>
Almonds (Inshell)**	177,770
Chestnuts (Inshell)	1,221
Hazelnuts (Inshell)**	1,086
Macadamias (Inshell)	51,000
Pecans (Inshell)	4,217
Pistachios (Inshell)	2,200
Walnuts (Inshell)	13,658
<i>Other Nuts (Inshell)</i>	<i>4,615</i>
<b>Other Horticulture</b>	<b>N/A</b>
Cut Flowers	N/A
<i>Nursery*</i>	<i>N/A</i>
Turf	N/A

\*\*Note: Total in-shell nut production includes the volumes of almonds and hazelnuts (marked with \*\*) in an in-shell equivalent weight.



## Data Tables—Value of Production

### Production Value

The table below summarises the **Value of Production** in million dollars of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Production (\$m)
All Horticultural Products	\$15,236.6
<b>All Fruit</b>	<b>\$5,752.1</b>
Apples	\$619.9
Avocados	\$488.7
Bananas	\$596.8
Berries - Combined	\$1,061.3
Blueberries	\$411.2
Rubus Berries	\$232.9
Strawberries	\$417.2
Cherries	\$231.3
Citrus - Combined	\$936.3
Grapefruit	\$21.0
Lemons/Limes	\$135.8
Mandarins	\$341.9
Oranges	\$437.6
Custard Apples	\$7.8
Kiwifruit	\$24.4
Lychees	\$32.0
Mangoes	\$167.4
Melons - Combined	\$149.0
Muskmelons	\$84.1
Watermelons	\$64.9
Nashi	\$4.5

Year Ending June 2021	Production (\$m)
Passionfruit	\$24.2
Papaya/Pawpaw	\$40.7
Persimmons	\$11.1
Pears	\$140.4
Pineapples	\$46.8
Summerfruit - Combined	\$338.9
Apricots	\$25.3
Nectarines/Peaches	\$236.1
Plums	\$77.5
Table Grapes	\$631.8
Processing Fruit Combined*	\$209.6
Dried Grapes	\$25.3
Prunes*	\$5.4
Other Dried Tree Fruit*	\$0.6
Canned Fruit*	\$17.2
Olives	\$161.2
Other Fruit	\$12.5
<b>All Vegetables</b>	<b>\$4,913.5</b>
Artichokes	\$1.2
Asparagus	\$81.1
Beans	\$74.6
Beetroot	\$10.8
Broccoli/Baby Broccoli	\$258.9

Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

## Data Tables—Value of Production

\*Note: The processed fruit lines marked with an asterisk (\*) do not contribute to total fruit value, as they have been counted towards the total in their respective categories (eg value of canning pineapples are already counted in the pineapple category). The exceptions are dried grapes, which is not a part of the table grapes category, and olives, which is not part of another fruit category.

Year Ending June 2021	Production (\$m)
Brussels Sprouts	\$27.3
Cabbage	\$33.7
Capsciums	\$196.6
Carrots	\$256.0
Cauliflower	\$63.1
Celery	\$60.5
Chillies	\$9.8
Cucumbers	\$172.7
Eggplant	\$21.4
Eng. Spinach/Silverbeet/Kale	\$22.2
Fresh Herbs - Combined	\$229.8
Fennel	\$2.7
Parsley and Other Herbs	\$227.1
Garlic	\$29.4
Ginger	\$55.5
Leafy Asian Vegetables	\$71.7
Leafy Salad Vegetables	\$495.0
Leeks	\$27.3
Head Lettuce	\$171.9
Mushrooms	\$393.1
Onions	\$203.2
Parsnips	\$11.2
Peas	\$68.9

Year Ending June 2021	Production (\$m)
Potatoes	\$807.3
Pumpkins	\$89.4
Sweet Corn	\$117.1
Sweetpotatoes	\$91.5
Tomatoes	\$562.2
Zucchini	\$84.4
<i>Other Vegetables</i>	\$115.0
<b>All Nuts</b>	<b>\$1,196.3</b>
Almonds	\$721.6
Chestnuts	\$9.3
Hazelnuts	\$4.4
Macadamias	\$339.1
Pecans	\$24.0
Pistachios	\$23.9
Walnuts	\$41.6
<i>Other Nuts</i>	\$32.3
<b>Other Horticulture</b>	<b>\$3,374.8</b>
Cut Flowers	\$277.3
<i>Nursery*</i>	\$2,789.5
Turf	\$308.0

#Note: The nursery production value has been reported for indication only. This value has been provided outside of THRUchain methodology and is based directly on project output from NY21000. See pages 474 to 479.



### Volume of Fresh Exports

The table below summarises the **Volume of Fresh Exports** in tonnes of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Fresh Export Volume (t)
All Horticultural Products	761,538
<b>All Fruit</b>	<b>421,439</b>
Apples	2,147
Avocados	3,155
Bananas	
Berries - Combined	3,933
Blueberries	342
Rubus Berries	13
Strawberries	3,578
Cherries	4,715
Citrus - Combined	238,576
Grapefruit	2,256
Lemons/Limes	4,197
Mandarins	59,563
Oranges	172,416
Custard Apples	92
Kiwifruit	727
Lychees	404
Mangoes	4,479
Melons - Combined	12,890
Muskmelons	10,806
Watermelons	2,084
Nashi	

Year Ending June 2021	Fresh Export Volume (t)
Passionfruit	
Papaya/Pawpaw	5
Persimmons	179
Pears	8,229
Pineapples	
Summerfruit - Combined	20,983
Apricots	414
Nectarines/Peaches	13,187
Plums	7,383
Table Grapes	120,725
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	200
<b>All Vegetables</b>	<b>215,374</b>
Artichokes	10
Asparagus	1,876
Beans	1,415
Beetroot	371
Broccoli/Baby Broccoli	3,619

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2021	Fresh Export Volume (t)
Brussels Sprouts	301
Cabbage	994
Capsciums	381
Carrots	108,356
Cauliflower	494
Celery	4,903
Chillies	4
Cucumbers	69
Eggplant	9
Eng. Spinach/Silverbeet/Kale	262
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	
Ginger	12
Leafy Asian Vegetables	
Leafy Salad Vegetables	1,028
Leeks	92
Head Lettuce	381
Mushrooms	66
Onions	44,885
Parsnips	
Peas	4

Year Ending June 2021	Fresh Export Volume (t)
Potatoes	37,274
Pumpkins	3,385
Sweet Corn	
Sweetpotatoes	1,254
Tomatoes	683
Zucchini	
<i>Other Vegetables</i>	3,245
<b>All Nuts*</b>	<b>124,724</b>
Almonds*	96,392
Chestnuts*	1
Hazelnuts*	6
Macadamias*	19,883
Pecans*	574
Pistachios*	504
Walnuts*	5,699
<i>Other Nuts*</i>	1,664
<b>Other Horticulture</b>	<b>N/A</b>
Cut Flowers	N/A
<i>Nursery*</i>	<i>N/A</i>
Turf	N/A

\*Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.



### Value of Fresh Exports

The table below summarises the **Value of Fresh Exports** in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Fresh Export Value (\$m)
All Horticultural Products	\$2,368.3
<b>All Fruit</b>	<b>\$1,216.4</b>
Apples	\$5.9
Avocados	\$22.0
Bananas	
Berries - Combined	\$34.0
Blueberries	\$8.4
Rubus Berries	\$0.2
Strawberries	\$25.5
Cherries	\$82.4
Citrus - Combined	\$441.5
Grapefruit	\$3.8
Lemons/Limes	\$8.4
Mandarins	\$143.8
Oranges	\$285.1
Custard Apples	\$0.5
Kiwifruit	\$4.3
Lychees	\$6.9
Mangoes	\$25.0
Melons - Combined	\$26.5
Muskmelons	\$21.0
Watermelons	\$5.4
Nashi	

Year Ending June 2021	Fresh Export Value (\$m)
Passionfruit	
Papaya/Pawpaw	<\$0.1
Persimmons	\$1.4
Pears	\$13.5
Pineapples	
Summerfruit - Combined	\$92.1
Apricots	\$2.4
Nectarines/Peaches	\$59.3
Plums	\$30.4
Table Grapes	\$460.7
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	<\$0.1
<b>All Vegetables</b>	<b>\$264.0</b>
Artichokes	<\$0.1
Asparagus	\$19.6
Beans	\$6.6
Beetroot	\$1.4
Broccoli/Baby Broccoli	\$15.3

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2021	Fresh Export Value (\$m)
Brussels Sprouts	\$2.0
Cabbage	\$2.4
Capsciums	\$1.5
Carrots	\$97.0
Cauliflower	\$1.7
Celery	\$8.6
Chillies	<\$0.1
Cucumbers	\$0.5
Eggplant	<\$0.1
Eng.Spinach/Silverbeet/Kale	\$2.7
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	
Ginger	\$0.1
Leafy Asian Vegetables	
Leafy Salad Vegetables	\$8.1
Leeks	\$0.5
Head Lettuce	\$1.2
Mushrooms	\$6.0
Onions	\$30.4
Parsnips	
Peas	<\$0.1

Year Ending June 2021	Fresh Export Value (\$m)
Potatoes	\$31.1
Pumpkins	\$4.9
Sweet Corn	
Sweetpotatoes	\$3.1
Tomatoes	\$3.6
Zucchini	
<i>Other Vegetables</i>	\$15.6
<b>All Nuts*</b>	<b>\$873.9</b>
Almonds*	\$545.1
Chestnuts*	<\$0.1
Hazelnuts*	<\$0.1
Macadamias*	\$276.1
Pecans*	\$5.0
Pistachios*	\$5.8
Walnuts*	\$19.1
<i>Other Nuts*</i>	\$22.7
<b>Other Horticulture</b>	<b>\$13.9</b>
Cut Flowers	\$7.9
<i>Nursery*</i>	<i>\$6.0</i>
Turf	

\*Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.



## Data Tables—Volume of Fresh Imports



### Volume of Fresh Imports

The table below summarises the **Volume of Fresh Imports** in tonnes of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Fresh Import Volume (t)
All Horticultural Products	194,912
All Fruit	118,817
Apples	1,727
Avocados	28,027
Bananas	
Berries - Combined	1,537
Blueberries	1,531
Rubus Berries	
Strawberries	7
Cherries	1,345
Citrus - Combined	25,359
Grapefruit	1,353
Lemons/Limes	6,636
Mandarins	3,350
Oranges	14,009
Custard Apples	
Kiwifruit	23,725
Lychees	
Mangoes	1,007
Melons - Combined	
Muskmelons	
Watermelons	
Nashi	2,215

Year Ending June 2021	Fresh Import Volume (t)
Passionfruit	
Papaya/Pawpaw	20
Persimmons	325
Pears	
Pineapples	
Summerfruit - Combined	2,109
Apricots	122
Nectarines/Peaches	1,594
Plums	393
Table Grapes	12,033
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	19,400
All Vegetables	26,900
Artichokes	2
Asparagus	3,115
Beans	400
Beetroot	18
Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)

## Data Tables—Volume of Fresh Imports

Year Ending June 2021	Fresh Import Volume (t)
Brussels Sprouts	
Cabbage	8
Capsicums	748
Carrots	
Cauliflower	
Celery	
Chillies	8
Cucumbers	
Eggplant	
Eng.Spinach/Silverbeet/Kale	6
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	10,641
Ginger	811
Leafy Asian Vegetables	
Leafy Salad Vegetables	2
Leeks	
Head Lettuce	
Mushrooms	4,413
Onions	3,085
Parsnips	
Peas	635

Year Ending June 2021	Fresh Import Volume (t)
Potatoes	
Pumpkins	6
Sweet Corn	
Sweetpotatoes	695
Tomatoes	59
Zucchini	
Other Vegetables	2,249
All Nuts*	49,195
Almonds*	2,153
Chestnuts*	6
Hazelnuts*	3,174
Macadamias*	379
Pecans*	
Pistachios*	2,349
Walnuts*	4,787
Other Nuts*	36,346
Other Horticulture	N/A
Cut Flowers	N/A
Nursery*	N/A
Turf	N/A

\*Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.



## Value of Fresh Imports

The table below summarises the **Value of Fresh Imports** in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Fresh Import Value (\$m)
All Horticultural Products	\$1,161.8
<b>All Fruit</b>	<b>\$515.2</b>
Apples	\$4.7
Avocados	\$184.7
Bananas	
Berries - Combined	\$32.3
Blueberries	\$32.2
Rubus Berries	
Strawberries	<\$0.1
Cherries	\$14.1
Citrus - Combined	\$62.6
Grapefruit	\$3.0
Lemons/Limes	\$18.1
Mandarins	\$10.4
Oranges	\$31.0
Custard Apples	
Kiwifruit	\$74.8
Lychees	
Mangoes	\$6.7
Melons - Combined	
Muskmelons	
Watermelons	
Nashi	\$5.2

Year Ending June 2021	Fresh Import Value (\$m)
Passionfruit	
Papaya/Pawpaw	\$0.1
Persimmons	\$2.2
Pears	
Pineapples	
Summerfruit - Combined	\$12.8
Apricots	\$0.7
Nectarines/Peaches	\$9.9
Plums	\$2.2
Table Grapes	\$58.9
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	\$56.3
<b>All Vegetables</b>	<b>\$82.3</b>
Artichokes	<\$0.1
Asparagus	\$19.3
Beans	\$0.5
Beetroot	<\$0.1
Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2021	Fresh Import Value (\$m)
Brussels Sprouts	
Cabbage	<\$0.1
Capsciums	\$3.1
Carrots	
Cauliflower	
Celery	
Chillies	\$0.1
Cucumbers	
Eggplant	
Eng. Spinach/Silverbeet/Kale	<\$0.1
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	\$25.9
Ginger	\$2.9
Leafy Asian Vegetables	
Leafy Salad Vegetables	<\$0.1
Leeks	
Head Lettuce	
Mushrooms	\$14.4
Onions	\$3.1
Parsnips	
Peas	\$1.9

Year Ending June 2021	Fresh Import Value (\$m)
Potatoes	
Pumpkins	<\$0.1
Sweet Corn	
Sweetpotatoes	\$0.8
Tomatoes	\$0.1
Zucchini	
<i>Other Vegetables</i>	\$9.8
<b>All Nuts*</b>	<b>\$422.8</b>
Almonds*	\$20.4
Chestnuts*	<\$0.1
Hazelnuts*	\$37.3
Macadamias*	\$0.6
Pecans*	
Pistachios*	\$36.8
Walnuts*	\$38.3
<i>Other Nuts*</i>	\$289.3
<b>Other Horticulture</b>	<b>\$141.5</b>
Cut Flowers	\$95.4
<i>Nursery*</i>	\$46.1
Turf	

\*Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.



## Data Tables—Fresh Supply

### Fresh Supply Volume

The table below summarises the **Volume of Fresh Supply** in tonnes of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Fresh Supply (t)
All Horticultural Products	4,050,975
<b>All Fruit</b>	<b>1,681,692</b>
Apples	199,775
Avocados	97,848
Bananas	401,777
Berries - Combined	101,540
Blueberries	22,606
Rubus Berries	10,179
Strawberries	68,755
Cherries	14,537
Citrus - Combined	300,916
Grapefruit	10,393
Lemons/Limes	56,167
Mandarins	103,924
Oranges	130,432
Custard Apples	1,744
Kiwifruit	29,930
Lychees	1,879
Mangoes	45,602
Melons - Combined	167,218
Muskmelons	55,466
Watermelons	111,753
Nashi	3,315

Sources: ABS; GTA; IRB; MP & DD (Freshlogic Analysis)

Year Ending June 2021	Fresh Supply (t)
Passionfruit	4,644
Papaya/Pawpaw	18,092
Persimmons	2,908
Pears	62,943
Pineapples	46,920
Summerfruit - Combined	81,723
Apricots	4,769
Nectarines/Peaches	60,593
Plums	16,360
Table Grapes	89,697
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	8,683
<b>All Vegetables</b>	<b>2,255,724</b>
Artichokes	448
Asparagus	8,096
Beans	34,625
Beetroot	5,240
Broccoli/Baby Broccoli	72,673

## Data Tables—Fresh Supply

Note: The processed fruit lines marked with an asterisk (\*) do not contribute to total fresh fruit supply volume because they are sold in a processed form.

Year Ending June 2021	Fresh Supply (t)
Brussels Sprouts	4,854
Cabbage	49,552
Capsicums	77,294
Carrots	206,545
Cauliflower	76,891
Celery	59,179
Chillies	1,592
Cucumbers	85,940
Eggplant	8,580
Eng. Spinach/Silverbeet/Kale	6,162
Fresh Herbs - Combined	13,285
Fennel	1,340
Parsley and Other Herbs	11,944
Garlic	9,454
Ginger	2,810
Leafy Asian Vegetables	30,547
Leafy Salad Vegetables	73,546
Leeks	11,007
Head Lettuce	138,642
Mushrooms	71,536
Onions	206,538
Parsnips	3,435
Peas	8,293

Year Ending June 2021	Fresh Supply (t)
Potatoes	446,717
Pumpkins	109,007
Sweet Corn	35,362
Sweetpotatoes	94,606
Tomatoes	239,023
Zucchini	40,667
<i>Other Vegetables</i>	23,577
<b>All Nuts</b>	<b>113,559</b>
Almonds	50,039
Chestnuts	1,226
Hazelnuts	4,005
Macadamias	3,671
Pecans	2,544
Pistachios	5,582
Walnuts	8,572
<i>Other Nuts</i>	37,920
<b>Other Horticulture</b>	<b>N/A</b>
Cut Flowers	N/A
<i>Nursery*</i>	<i>N/A</i>
Turf	N/A

\*\*Note: Nut supply volume includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.



## Data Tables—Wholesale Value

### Fresh Supply Wholesale Value

The table below summarises the **Wholesale Value** of the Fresh Supply in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2021.

Year Ending June 2021	Wholesale Value (\$m)
All Horticultural Products	\$15,633.2
<b>All Fruit</b>	<b>\$5,743.4</b>
Apples	\$720.1
Avocados	\$717.3
Bananas	\$723.2
Berries - Combined	\$1,253.0
Blueberries	\$517.9
Rubus Berries	\$273.0
Strawberries	\$462.1
Cherries	\$206.0
Citrus - Combined	\$685.6
Grapefruit	\$23.9
Lemons/Limes	\$169.6
Mandarins	\$266.3
Oranges	\$225.8
Custard Apples	\$8.7
Kiwifruit	\$117.6
Lychees	\$30.7
Mangoes	\$172.4
Melons - Combined	\$148.6
Muskmelons	\$77.7
Watermelons	\$70.9
Nashi	\$15.9

Year Ending June 2021	Wholesale Value (\$m)
Passionfruit	\$28.3
Papaya/Pawpaw	\$47.9
Persimmons	\$13.0
Pears	\$141.1
Pineapples	\$44.0
Summerfruit - Combined	\$301.7
Apricots	\$27.6
Nectarines/Peaches	\$219.2
Plums	\$55.0
Table Grapes	\$326.3
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	\$41.9
<b>All Vegetables</b>	<b>\$5,207.2</b>
Artichokes	\$1.3
Asparagus	\$123.3
Beans	\$82.1
Beetroot	\$9.9
Broccoli/Baby Broccoli	\$288.2

Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

## Data Tables—Wholesale Value

*Note: The processed fruit lines marked with an asterisk (\*) do not contribute to total fresh fruit wholesale value because they are sold in a processed form.*

Year Ending June 2021	Wholesale Value (\$m)
Brussels Sprouts	\$29.5
Cabbage	\$36.7
Capsicums	\$230.7
Carrots	\$202.3
Cauliflower	\$72.0
Celery	\$62.6
Chillies	\$11.3
Cucumbers	\$201.9
Eggplant	\$25.0
Eng. Spinach/Silverbeet/Kale	\$23.3
Fresh Herbs - Combined	\$269.4
Fennel	\$3.2
Parsley and Other Herbs	\$266.2
Garlic	\$100.8
Ginger	\$61.8
Leafy Asian Vegetables	\$84.3
Leafy Salad Vegetables	\$574.2
Leeks	\$31.6
Head Lettuce	\$201.1
Mushrooms	\$485.5
Onions	\$209.6
Parsnips	\$13.1
Peas	\$70.9

Year Ending June 2021	Wholesale Value (\$m)
Potatoes	\$522.8
Pumpkins	\$100.0
Sweet Corn	\$124.7
Sweetpotatoes	\$104.4
Tomatoes	\$628.6
Zucchini	\$99.1
<i>Other Vegetables</i>	\$125.1
<b>All Nuts</b>	<b>\$1,065.5</b>
Almonds	\$318.1
Chestnuts	\$11.0
Hazelnuts	\$47.1
Macadamias	\$92.8
Pecans	\$23.7
Pistachios	\$81.6
Walnuts	\$70.7
<i>Other Nuts</i>	\$420.5
<b>Other Horticulture</b>	<b>\$3,617.1</b>
Cut Flowers	\$380.5
<i>Nursery*</i>	\$2,928.6
Turf	\$308.0

*#Note: The nursery wholesale value has been reported for indication only. This value has been provided outside of THRUchain methodology and is based directly on project output from NY21000. See pages 474 to 479.*



## All Horticulture

### All Fresh Horticulture Overview

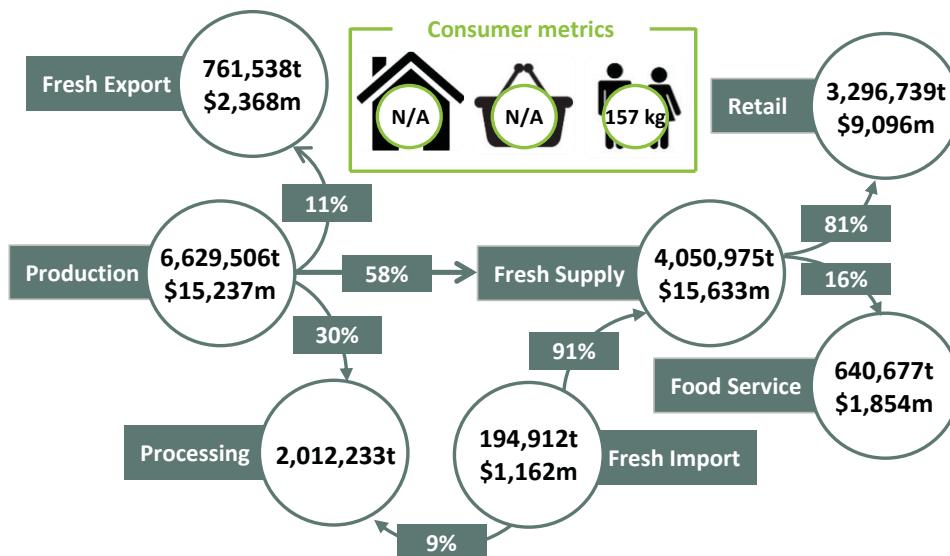
Pages 52-55 profile total horticultural production and trade. It combines information on fruit, vegetables, nuts and other horticultural categories (cut flowers, nursery and turf).

For the year ending June 2021:

- **6.63 million tonnes** of horticultural products (*not including cut flowers, nursery and turf products*) was produced in Australia and the value for all categories was **\$15.0 billion**.
- The wholesale value of the fresh supply was **\$15.6 billion** for all categories, with **\$9.1 billion** into retail and **\$1.9 billion** into food service (*not including cut flowers, nursery, turf and nut products*).
- The supply per capita was **157 kg**, based on the volume supplied.



#### All Fresh Horticulture Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

## All Horticulture



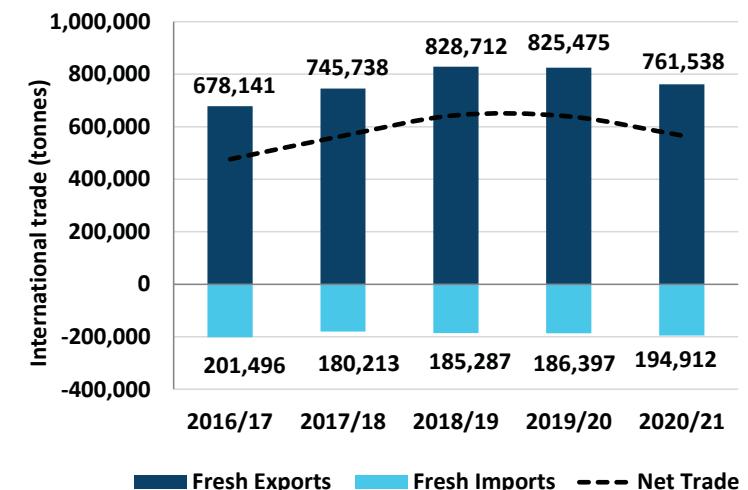
Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,622,736	6,532,853	-1%	6,629,506	+1%
Production (\$m)	\$14,436.0	\$15,156.1	+5%	\$15,236.6	<1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	828,712	825,475	>-1%	761,538	-8%
Fresh Export Value (\$m)	\$ 2,686.2	\$ 2,749.0	+2%	\$ 2,368.3	-14%
Fresh Import Volume (t)	185,287	186,397	<1%	194,912	+5%
Fresh Import Value (\$m)	\$ 1,064.9	\$ 1,090.7	+2%	\$ 1,161.8	+7%
Fresh Supply (t)	4,043,673	4,047,771	<1%	4,050,975	<1%
Fresh Supply Wholesale Value (\$m)	\$14,438.6	\$15,524.6	+8%	\$15,633.2	<1%
Supply per Capita (kg)	160.43	156.89	-2%	157.32	<1%

Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

\*Note: Figures have been modified from those published in the previous edition of the handbook (2019/20 edition).

### All Fresh Horticulture International Trade

Australia is a net exporter of fresh horticultural products. For the year ending June 2021, Australia exported **761,538 tonnes** of fresh horticultural products (not including nursery, turf and flower categories), as profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

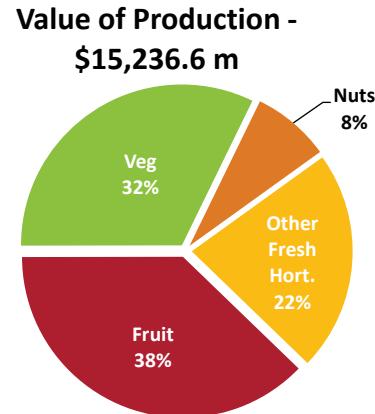
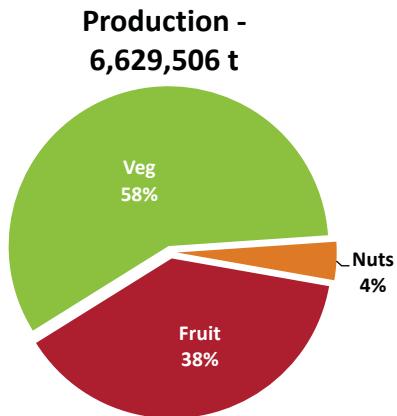


## All Horticulture



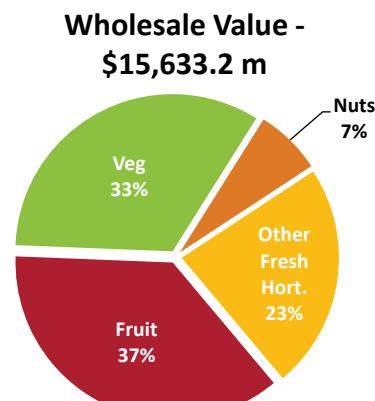
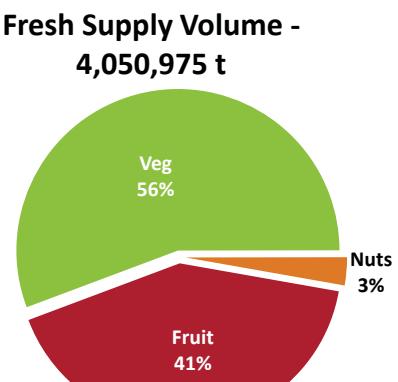
### Production

The charts below profile the share of total Australian production of all horticultural categories during the year ending June 2021. For the below charts, only the **value** of the **Other Fresh Horticulture** grouping has been recorded, due to inconsistencies in the units used to measure volumes for this group.



### Fresh supply

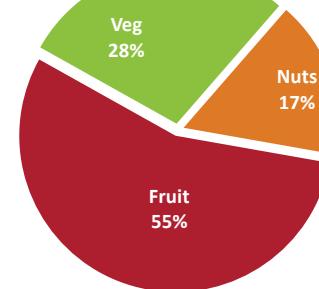
The charts below profile the share of the total fresh supply of all horticultural categories during the year ending June 2021.



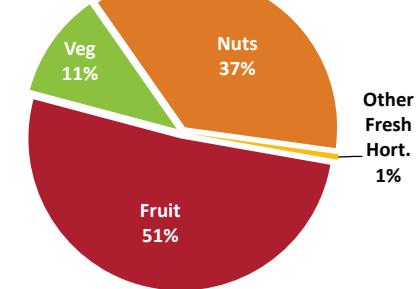
### Fresh exports

The charts below profile the share of total Australian fresh exports of all horticultural categories during the year ending June 2021.

**Fresh Export Volume - 761,538 t**



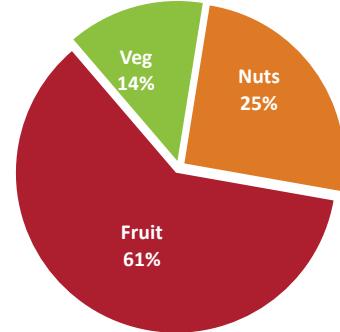
**Fresh Export Value - \$2,368.3 m**



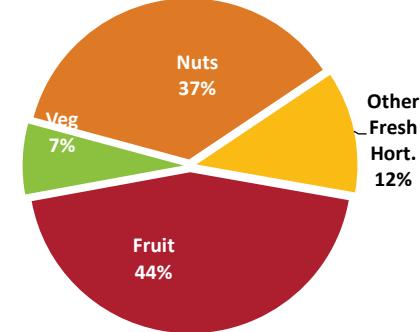
### Fresh imports

The charts below profile the share of total Australian fresh imports of all horticultural categories during the year ending June 2021.

**Fresh Import Volume - 194,912 t**



**Fresh Import Value - \$1,161.8 m**





## All Fruit—Overview

### All Fresh Fruit Overview

Pages 56-57 profile total fruit production and trade. It combines information on all fruit categories covered in this handbook.

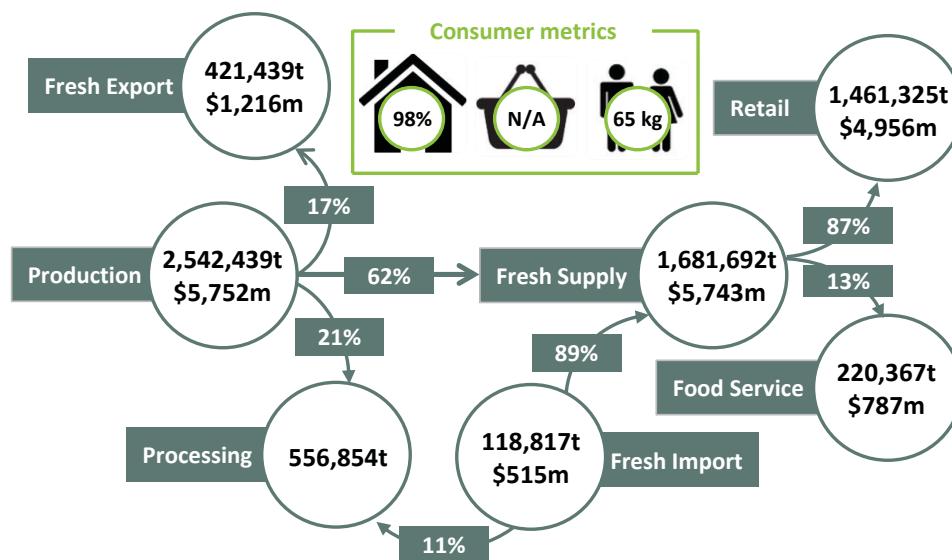
For the year ending June 2021:

- 2.54 million tonnes** of fruit was produced in Australia valued at **\$5.7 billion**.
- The wholesale value of the fresh supply was **\$5.72 billion** with **\$4,953 m** distributed into retail and **\$787 m** into food service.
- 98%** of Australian households purchased fruit.
- The supply per capita was **65 kg**, based on the volume supplied.

\* 'Other Fruit' are included in the calculation of the category overview totals but have not been profiled separately.



### All Fresh Fruit Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

## All Fruit—Overview



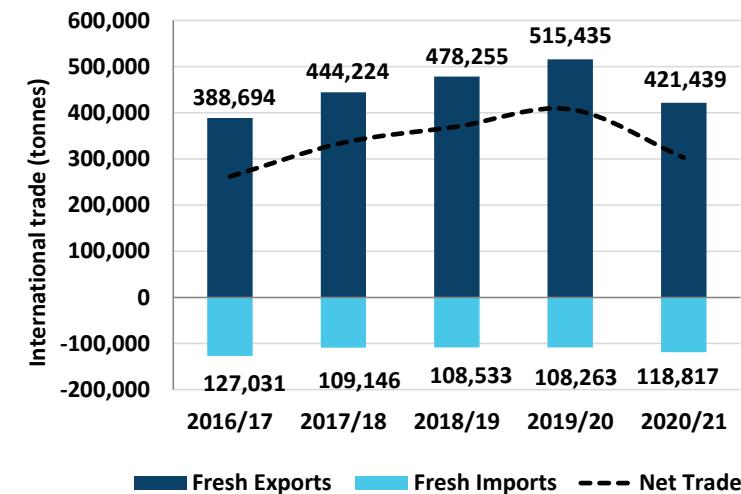
Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	2,685,441	2,575,407	-4%	2,542,439	-1%
Production (\$m)	\$ 5,527.7	\$ 5,694.1	+3%	\$ 5,752.1	+1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	478,255	515,435	+8%	421,439	-18%
Fresh Export Value (\$m)	\$ 1,332.0	\$ 1,475.3	+11%	\$ 1,216.4	-18%
Fresh Import Volume (t)	108,533	108,263	>-1%	118,817	+10%
Fresh Import Value (\$m)	\$ 392.2	\$ 415.9	+6%	\$ 515.2	+24%
Fresh Supply (t)	1,722,967	1,674,699	-3%	1,681,692	<1%
Fresh Supply Wholesale Value (\$m)	\$ 5,231.8	\$ 5,425.6	+4%	\$ 5,743.4	+6%
Supply per Capita (kg)	68.36	64.91	-5%	65.31	<1%
Retail Supply (t)	1,480,435	1,479,151	>-1%	1,461,325	-1%
Retail Supply Wholesale Value (\$m)	\$ 4,491.8	\$ 4,761.0	+6%	\$ 4,955.9	+4%
Food Service Supply (t)	242,533	195,549	-19%	220,367	+13%
Food Service Wholesale Value (\$m)	\$ 740.0	\$ 664.7	-10%	\$ 787.4	+18%

Sources: ABS; AC; AUSVEG; CFVWA; GTA; MP & DD (Freshlogic Analysis)

\*Note: Figures have been modified from those published in the previous edition of the handbook (2019/20 edition).

### All Fresh Fruit International Trade

#### Net All Fresh Fruit International Trade



Source: GTA



# Apples

## Fresh Apple Overview

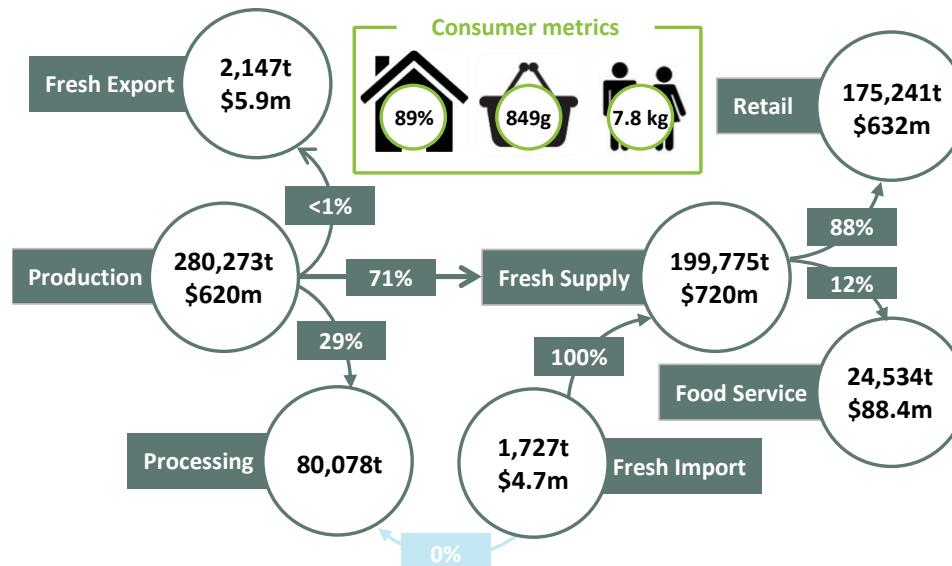
Apple production occurs across all states in Australia. Harvesting typically occurs between February and May. Year-round availability is made possible through the use of controlled atmosphere technology.

For the year ending June 2021:

- **280,273 t** produced and valued at **\$620 m** with **29%** sent to be processed.
- The wholesale value of the fresh supply was **\$720 m**, with **\$632 m** distributed into retail and **\$88.4 m** into food service.
- **89%** of Australian households purchased apples, buying an average of **849 g** per shopping trip.
- The supply per capita was **7.8 kg**, based on the volume supplied.



## Fresh Apple Supply Chain — Year Ending June 2021



Sources: ABS; AC; Apples & Pears Australia Limited (APAL); CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Apples

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	310,876	301,667	-3%	280,273	-7%
Production (\$m)	\$ 512.8	\$ 578.5	+13%	\$ 619.9	+7%
Producing Trees (000 Trees)	11,421	11,421	-	11,421	-
Fresh Export Volume (t)	4,416	2,953	-33%	2,147	-27%
Fresh Export Value (\$m)	\$ 10.6	\$ 7.6	-28%	\$ 5.9	-22%
Fresh Import Volume (t)	732	786	+7%	1,727	>100%
Fresh Import Value (\$m)	\$ 1.9	\$ 1.9	<1%	\$ 4.7	>100%
Fresh Supply (t)	213,712	213,309	>-1%	199,775	-6%
Fresh Supply Wholesale Value (\$m)	\$ 572.6	\$ 652.2	+14%	\$ 720.1	+10%
Supply per Capita (kg)	8.48	8.27	-2%	7.76	-6%
Retail Supply (t)	185,032	189,038	+2%	175,241	-7%
Retail Supply Wholesale Value (\$m)	\$ 495.8	\$ 577.9	+17%	\$ 631.6	+9%
Food Service Supply (t)	28,680	24,271	-15%	24,534	+1%
Food Service Wholesale Value (\$m)	\$ 76.8	\$ 74.2	-3%	\$ 88.4	+19%

Sources: ABS; AC; APAL; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Major Apple Production Areas



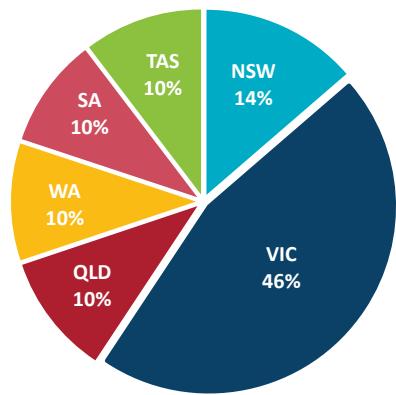
Source: APAL





# Apples

## 2020/21 Fresh Apple Production by State



Source: APAL

## Fresh Apple Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	38,283												
Victoria	127,939												
Queensland	29,558												
Western Australia	28,691												
South Australia	26,788												
Tasmania	29,015												
Imports	1,727												
Availability legend		High	Medium	Low									

Source: APAL

## Main Apple Varieties

Although there are currently a number of varieties grown in Australia, production for the fresh market is dominated by 3 main varieties. These include:

**Pink Lady**, also known as Cripps Pink, a green skinned apple with a pink to light red blush. A cross between Golden Delicious and Lady Williams, Pink Lady apples accounted for **41%** of fresh production.

**Gala** (including **Royal Gala**), a medium round apple, typically bright red with a pale yellow blush. Royal Gala apples accounted for **23%** of fresh production.

**Granny Smith**, the most common block green apple in Australia, accounted for **18%** of fresh production.



# Apples

## Seasonality by Apple Variety

The seasonal availability of some major varieties is profiled in the table below.

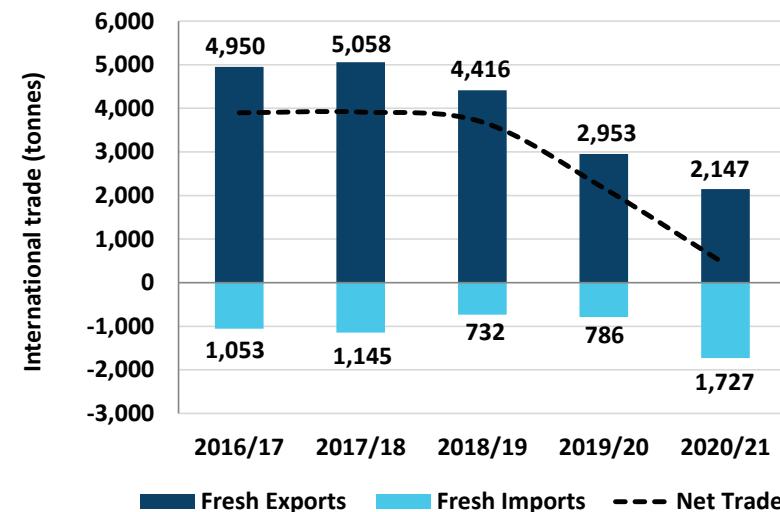
Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	82,080												
Royal Gala	46,045												
Granny Smith	36,035												
Sundowner	2,002												
<i>Other</i>	<b>34,033</b>												
<b>Processing</b>	<b>80,078</b>												
Availability legend		High	Medium	Low									

Source: APAL

## Fresh Apple International Trade

Australia has traditionally been a net exporter of fresh apples, typically exporting between **2,000-5,000 tonnes** per year. For the year ending June 2021, Australia exported **2,147 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Apple International Trade



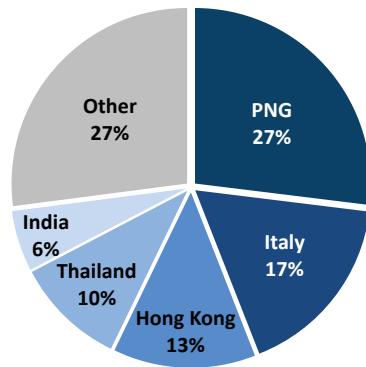
Source: GTA



## Apples

For the year ending June 2021, **27%** of exported fresh apples were sent to the PNG, as profiled in the chart below.

### 2020/21 Fresh Apple Exports by Country



Source: GTA

### Fresh Apple Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Victoria	509	492	1,014	Victoria	3,204	2,158	1,657
New South Wales	223	268	588	Queensland	635	304	248
Western Australia	-	26	73	Tasmania	388	343	92
Queensland	-	-	53	Western Australia	100	114	86
<b>TOTAL</b>	<b>732</b>	<b>786</b>	<b>1,727</b>	New South Wales	30	29	33
				<i>Other</i>	59	6	31
				<b>TOTAL</b>	<b>4,416</b>	<b>2,953</b>	<b>2,147</b>

### Fresh Apple Imports and Exports by Country

Imports by country (Tonnes)			Exports by country (Tonnes)				
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
China	580	786	1,727	PNG	1,032	701	579
Vietnam	-	< 0.5	-	Italy	521	213	367
New Zealand	152	-	-	Hong Kong	493	459	282
<i>Other</i>	-	< 0.5	-	Thailand	155	190	218
<b>TOTAL</b>	<b>732</b>	<b>786</b>	<b>1,727</b>	India	121	-	120
				<i>Other</i>	2,094	1,390	581
				<b>TOTAL</b>	<b>4,416</b>	<b>2,953</b>	<b>2,147</b>

Source: GTA

## Apples

### Processed Apple International Trade

For the year ending June 2021, an additional **804 tonnes** of dried apples were imported, while **79 tonnes** were exported. Australia also imported **22.0 mega litres** of apple juice, while exporting **1.8 mega litres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 61.



Source: GTA





# Avocados

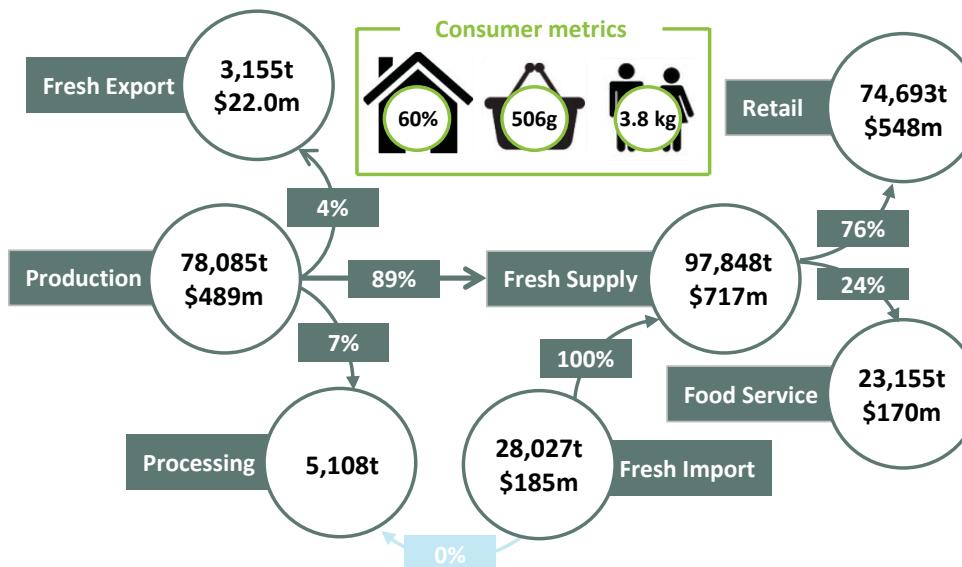
## Fresh Avocado Overview

Avocado production occurs mainly in Queensland and Northern New South Wales during the winter, and Western Australia during the summer. The most common varieties of avocado in Australia are the Hass and Shepard. For the year ending June 2021:

- **78,085 t** produced and valued at **\$489 m**.
- The wholesale value of the fresh supply was **\$717 m**, with **\$548 m** distributed into retail and **\$170 m** into food service.
- **60%** of Australian households purchased avocados, buying an average of **506g** per shopping trip.
- The supply per capita was **3.8 kg**, based on the volume supplied.



## Fresh Avocado Supply Chain—Year Ending June 2021



Sources: Avocados Australia Limited (AAL); ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Avocados

Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	
Production (t)	85,545	87,546	+2%	78,085	-11%
Production (\$m)	\$ 426.7	\$ 432.3	+1%	\$ 488.7	+13%
Producing Trees (000 Trees)	1,561	1,837	+18%	-	-
Fresh Export Volume (t)	3,202	4,051	+27%	3,155	-22%
Fresh Export Value (\$m)	\$ 19.7	\$ 25.0	+27%	\$ 22.0	-12%
Fresh Import Volume (t)	14,562	16,121	+11%	28,027	+74%
Fresh Import Value (\$m)	\$ 73.3	\$ 79.8	+9%	\$ 184.7	>100%
Fresh Supply (t)	91,515	94,245	+3%	97,848	+4%
Fresh Supply Wholesale Value (\$m)	\$ 512.2	\$ 540.0	+5%	\$ 717.3	+33%
Supply per Capita (kg)	3.63	3.65	<1%	3.80	+4%
Retail Supply (t)	69,432	74,197	+7%	74,693	<1%
Retail Supply Wholesale Value (\$m)	\$ 388.6	\$ 425.1	+9%	\$ 547.6	+29%
Food Service Supply (t)	22,084	20,048	-9%	23,155	+15%
Food Service Wholesale Value (\$m)	\$ 123.6	\$ 114.9	-7%	\$ 169.8	+48%

Sources: AAL; ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Major Avocado Production Areas



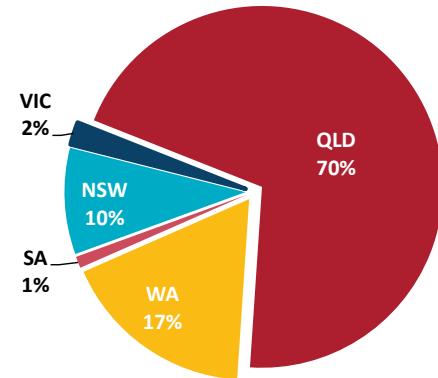
Source: AAL





## Avocados

### 2020/21 Fresh Avocado Production by State



Source: AAL

### Fresh Avocado Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	54,685												
Western Australia	13,547												
New South Wales	7,418												
Victoria	1,599												
South Australia	800												
Availability legend		High	Medium	Low									

Source: AAL; GTA

### Main Avocado Varieties

Production for the fresh market is dominated by the Hass avocado, with a number of other varieties with different seasons providing year round availability. These include:

**Hass**, an oval shaped avocado with dark-green, pebbly skin which darkens when ripe. Hass avocados accounted for **80%** of fresh production.

**Shepard**, a lighter green, pear shaped avocado which does not darken when it ripens. Shepard avocados accounted for **17%** of fresh production.

## Avocados

Other varieties accounted for **3%** of fresh production.

### Seasonality by Avocado Variety

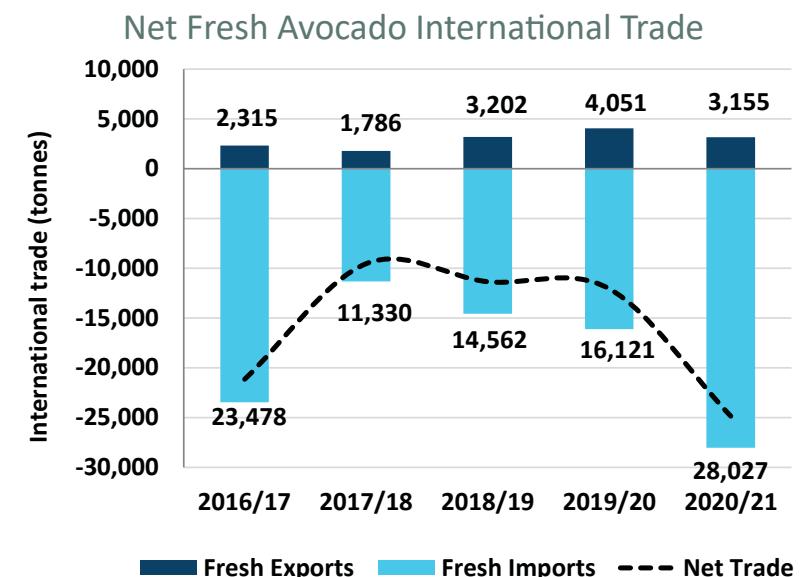
The seasonal availability of some major varieties is profiled in the table below.

Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	60,689												
Shepard	15,291												
<b>Other</b>	<b>2,106</b>												
Availability legend		High	Medium	Low									

Source: AAL

### Fresh Avocado International Trade

Australia has traditionally been a net importer of fresh avocados. For the year ending June 2021, Australia imported **28,027 tonnes**, and exported **3,155 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

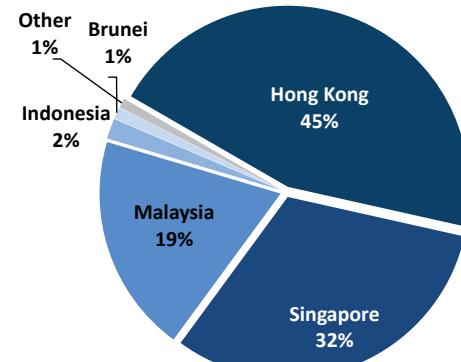




## Avocados

For the year ending June 2021, Hong Kong received **45%** of exported fresh avocados each, as profiled in the chart below.

### 2020/21 Fresh Avocado Exports by Country



Source: GTA

### Fresh Avocado Imports and Exports by State

Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)		
Year Ending June	2019	2020	Year Ending June	2019	2020
New South Wales	5,146	6,273	Queensland	1,643	1,559
Queensland	8,644	8,829	New South Wales	536	563
Victoria	772	1,020	Western Australia	793	1,370
Western Australia	-	-	Victoria	163	493
<b>TOTAL</b>	<b>14,562</b>	<b>16,121</b>	South Australia	60	65
			<b>Other</b>	<b>7</b>	<b>1</b>
			<b>TOTAL</b>	<b>3,202</b>	<b>4,051</b>
					3,155

## Avocados

## Avocados



### Fresh Imports and Exports by Country

Imports by country (Tonnes)			Exports by country (Tonnes)			
Year Ending June	2019	2020	Year Ending June	2019	2020	
New Zealand	14,561	16,121	25,509	Hong Kong	360	804
Chile	-	-	2,518	Singapore	1,280	1,526
<b>Other</b>	<b>-</b>	<b>-</b>	<b>&lt;0.5</b>	Malaysia	1,399	1,455
<b>TOTAL</b>	<b>14,562</b>	<b>16,121</b>	<b>28,027</b>	Indonesia	87	75
				Brunei	24	30
				<b>Other</b>	<b>53</b>	<b>162</b>
				<b>TOTAL</b>	<b>3,202</b>	<b>4,051</b>
					3,155	

Source: GTA





## Bananas

### Fresh Banana Overview

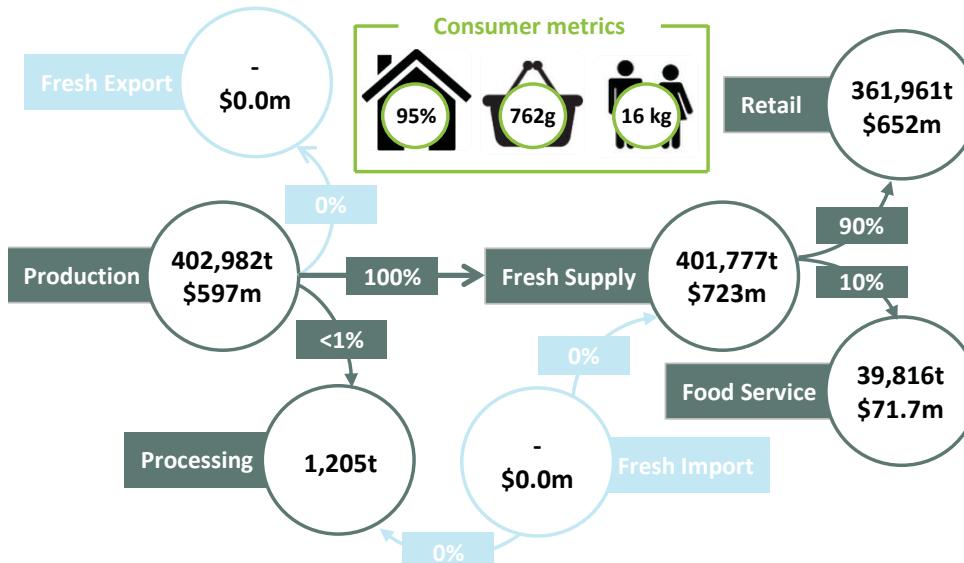
As a tropical fruit, banana production predominantly occurs in the North of Australia, in Queensland, Northern NSW, the Northern Territory and Western Australia. There is minimal international trade of fresh bananas, with some limited trade of dried banana products.

For the year ending June 2021:

- **402,982 t** was produced.
- The value of production was **\$596.8 m** while the wholesale value of the fresh supply was **\$723.2 m**.
- **95%** of Australian households purchased bananas, buying an average of **762 g** per shopping trip.
- The supply per capita was **16 kg**, based on the volume supplied.



### Fresh Banana Supply Chain—Year Ending June 2021



Sources: Australian Banana Growers Council (ABGC); ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Bananas



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	372,204	381,676	+3%	402,982	+6%
Production (\$m)	\$ 604.9	\$ 596.2	-1%	\$ 596.8	<1%
Production area (Ha)	10,962	12,254	+12%	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	371,091	380,534	+3%	401,777	+6%
Fresh Supply Wholesale Value (\$m)	\$ 733.0	\$ 722.5	-1%	\$ 723.2	<1%
Supply per Capita (kg)	14.72	14.75	<1%	15.60	+6%
Retail Supply (t)	331,331	350,099	+6%	361,961	+3%
Retail Supply Wholesale Value (\$m)	\$ 654.5	\$ 664.7	+2%	\$ 651.5	-2%
Food Service Supply (t)	39,760	30,435	-23%	39,816	+31%
Food Service Wholesale Value (\$m)	\$ 78.5	\$ 57.8	-26%	\$ 71.7	+24%

Sources: ABGC; ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Banana Production Areas

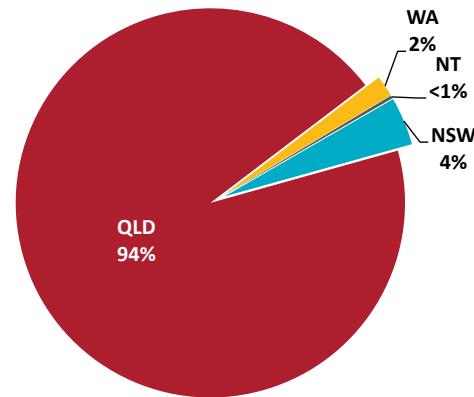


Source: ABGC



## Bananas

### 2020/21 Fresh Banana Production by State



Source: ABGC

### Fresh Banana Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	378,803												
Western Australia	7,052												
Northern Territory	1,007												
New South Wales	16,119												
Availability legend		High	Medium	Low									

Source: ABGC

## Main Banana Varieties

Production in Australia is dominated almost entirely by the Cavendish variety. The other main variety in Australia is the Lady Finger.

**Cavendish**, the typical long curved banana. Cavendish bananas accounted for **97%** of fresh production.

**Lady Finger**, a shorter and straighter banana. Lady Finger bananas accounted for **3%** of fresh production.



## Bananas

### Seasonality by Banana Variety

The seasonal availability of some major varieties is profiled in the table below.

Variety	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	390,893												
Lady Fingers	12,089												

Availability legend

High Medium Low None

Source: ABGC

## Processed Banana International Trade

Australia has a limited amount of international trade in fresh bananas, with the little trade that does occur being dominated by dried banana products. For the year ending June 2021, **56 tonnes** of dried bananas were imported, while **62 tonnes** was exported.



Source: GTA





## Berries—Overview

### Fresh Berries Overview

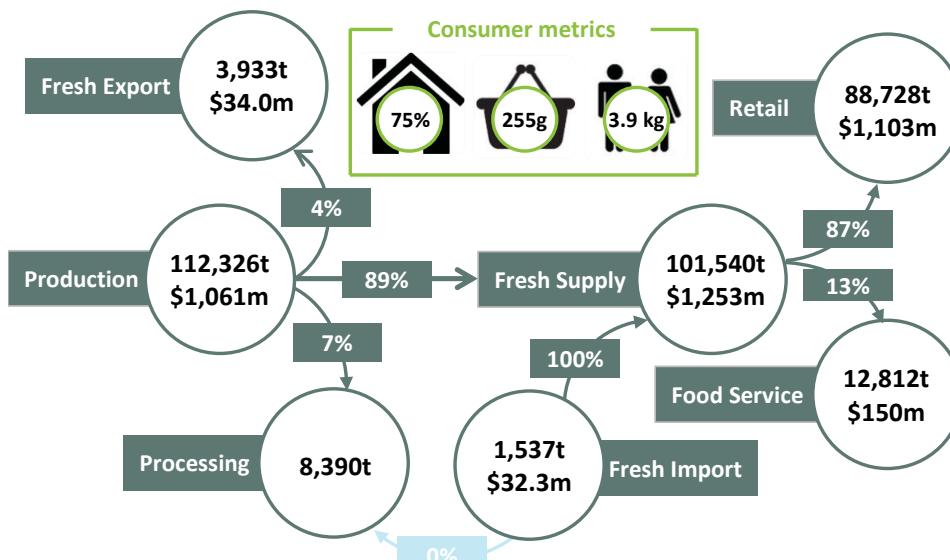
Pages 74-75 profile total berry production and trade. It combines information on blueberries, strawberries and rubus berries (such as raspberries and blackberries). The following pages profile each berry category in more detail.

For the year ending June 2021:

- **112,326 t** was produced valued at **\$1,061 m**.
- The wholesale value of the fresh supply was **\$1,253 m** with **\$1,103 m** distributed into retail and **\$150 m** into food service.
- **75%** of Australian households purchased fresh berries, buying an average of **255 g** per shopping trip.
- The supply per capita was **3.9 kg**, based on the volume supplied.



### Fresh Berries Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

## Berries—Overview



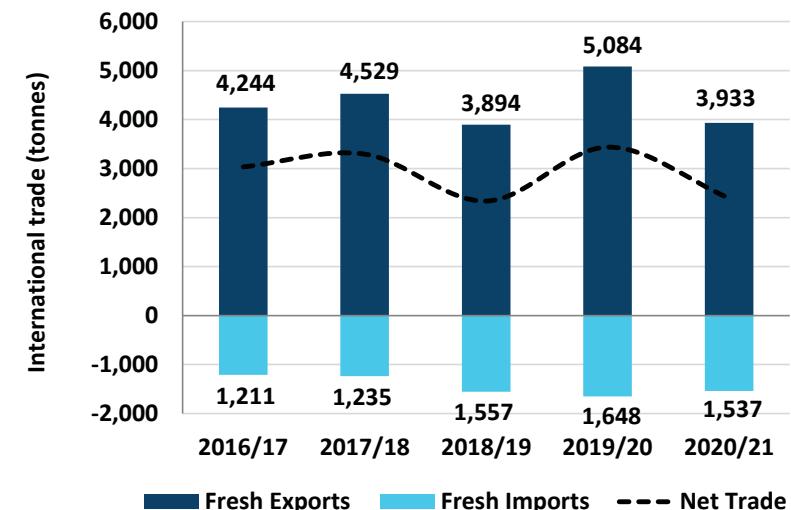
Year Ending June

	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	105,090	113,025	+8%	112,326	>-1%
Production (\$m)	\$ 938.6	\$ 1,040.6	+11%	\$ 1,061.3	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,894	5,084	+31%	3,933	-23%
Fresh Export Value (\$m)	\$ 29.3	\$ 42.0	+44%	\$ 34.0	-19%
Fresh Import Volume (t)	1,557	1,648	+6%	1,537	-7%
Fresh Import Value (\$m)	\$ 33.0	\$ 36.0	+9%	\$ 32.3	-10%
Fresh Supply (t)	95,115	97,497	+3%	101,540	+4%
Fresh Supply Wholesale Value (\$m)	\$ 1,113.5	\$ 1,222.9	+10%	\$ 1,253.0	+2%
Supply per Capita (kg)	3.77	3.78	<1%	3.94	+4%
Retail Supply (t)	81,880	85,138	+4%	88,728	+4%
Retail Supply Wholesale Value (\$m)	\$ 967.7	\$ 1,073.9	+11%	\$ 1,103.3	+3%
Food Service Supply (t)	13,234	12,359	-7%	12,812	+4%
Food Service Wholesale Value (\$m)	\$ 145.9	\$ 149.0	+2%	\$ 149.7	<1%

Sources: ABS; AC; CFVWA; GTA; IRB; MP & DD (Freshlogic Analysis)

### Fresh Berries International Trade

#### Net Fresh Berries International Trade



Source: GTA



## Berries—Blueberries



### Fresh Blueberries Overview

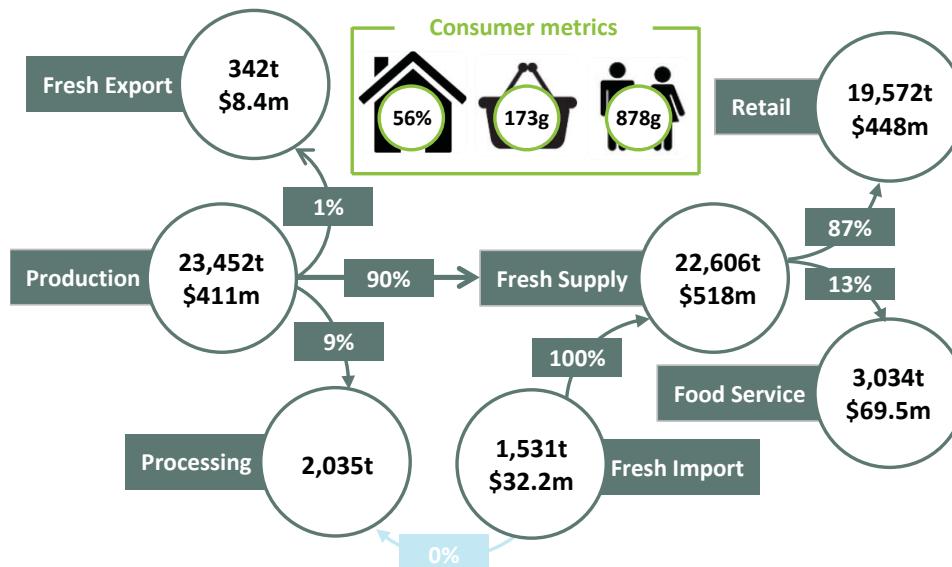
Blueberry production is centred in the northern New South Wales region of Coffs Harbour. The majority of the production in this region occurs over the summer months. A number of other blueberry production regions across Australia allow for close to year-round availability.

For the year ending June 2021:

- **23,452t** was produced and valued at **\$411 m**
- The wholesale value of the fresh supply was **\$517.9 m** with **\$448.4 m** distributed into retail and **\$69.5 m** into food service.
- **56%** of Australian households purchased fresh blueberries, buying an average of **173 g** per shopping trip.
- The supply per capita was **878 g**, based on the volume supplied.



### Fresh Blueberries Supply Chain—Year Ending June 2021



Sources: Berries Australia (BA); ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Berries—Blueberries

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	19,008	20,783	+9%	23,452	+13%
Production (\$m)	\$ 338.7	\$ 389.6	+15%	\$ 411.2	+6%
Production area (Ha)	1,375	1,375	-	1,375	-
Fresh Export Volume (t)	201	393	+96%	342	-13%
Fresh Export Value (\$m)	\$ 4.8	\$ 8.4	+75%	\$ 8.4	<1%
Fresh Import Volume (t)	1,555	1,644	+6%	1,531	-7%
Fresh Import Value (\$m)	\$ 33.0	\$ 36.0	+9%	\$ 32.2	-10%
Fresh Supply (t)	18,713	20,231	+8%	22,606	+12%
Fresh Supply Wholesale Value (\$m)	\$ 436.1	\$ 497.4	+14%	\$ 517.9	+4%
Supply per Capita (kg)	0.74	0.78	+6%	0.88	+12%
Retail Supply (t)	15,994	17,366	+9%	19,572	+13%
Retail Supply Wholesale Value (\$m)	\$ 372.7	\$ 427.0	+15%	\$ 448.4	+5%
Food Service Supply (t)	2,719	2,865	+5%	3,034	+6%
Food Service Wholesale Value (\$m)	\$ 63.4	\$ 70.4	+11%	\$ 69.5	-1%

Sources: BA; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Blueberry Production Areas

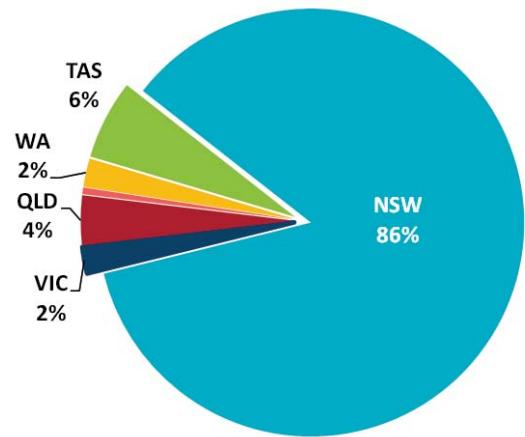


Source: BA



## Berries—Blueberries

2020/21 Fresh Blueberries Production by State



Source: BA

### Fresh Blueberries Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	20,075												
Queensland	879												
Tasmania	1,407												
Victoria	469												
Western Australia	504												
South Australia	117												
Imports	1,531												
Availability legend		High	Medium	Low									

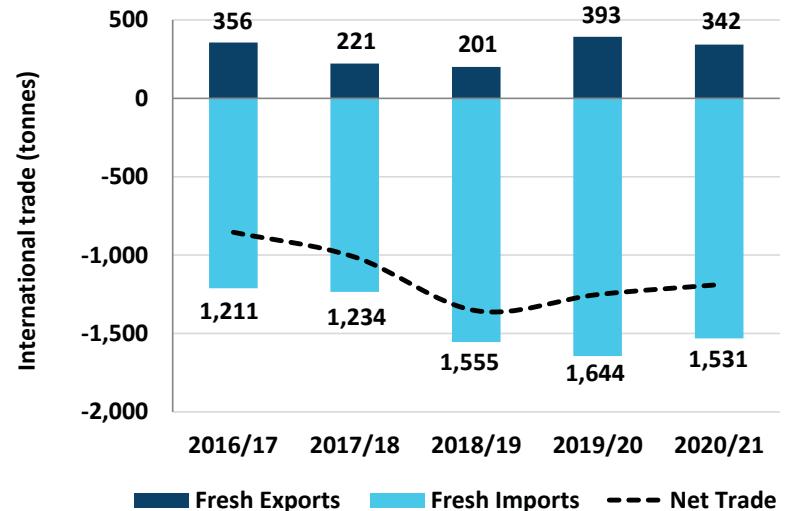
Source: BA

### Fresh Blueberries International Trade

Australia has traditionally been a net importer of fresh blueberries, typically importing **1,000-1,700 tonnes** per year, with the majority of this volume coming from New Zealand. For the year ending June 2021, Australia imported **1,531 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Berries—Blueberries

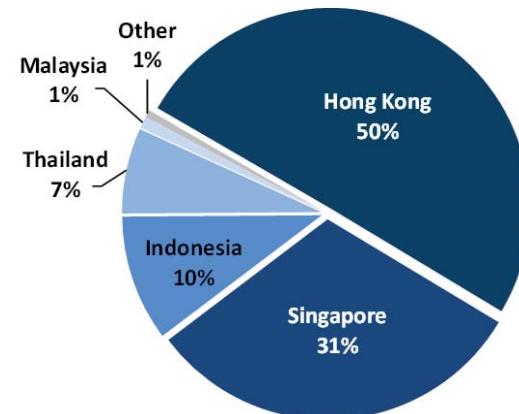
Net Fresh Blueberries International Trade



Source: GTA

For the year ending June 2021, **50%** of exported fresh blueberries were sent to Hong Kong, as profiled in the chart on the below.

### 2020/21 Fresh Blueberries Exports by Country



Source: GTA





## Berries—Blueberries



## Berries—Blueberries

### Fresh Blueberry Imports and Exports by State

Year Ending June	Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	772	840	835	New South Wales	126	232	249
Queensland	375	384	321	Queensland	63	140	66
Western Australia	199	234	249	Victoria	9	19	15
Victoria	197	150	126	Tasmania	<0.5	-	5
South Australia	12	36	-	South Australia	<0.5	-	2
<b>TOTAL</b>	<b>1,555</b>	<b>1,644</b>	<b>1,531</b>	<i>Other</i>	<b>3</b>	<b>1</b>	<b>5</b>
				<b>TOTAL</b>	<b>201</b>	<b>393</b>	<b>342</b>

### Fresh Blueberry Imports and Exports by Country

Year Ending June	Imports by country (Tonnes)			Exports by country (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
New Zealand	1,497	1,640	1,507	Hong Kong	125	235	172
Chile	9	4	24	Singapore	39	70	107
US	46	-	-	Indonesia	4	25	35
<i>Other</i>	<b>3</b>	-	-	Thailand	18	36	24
<b>TOTAL</b>	<b>1,555</b>	<b>1,644</b>	<b>1,531</b>	Malaysia	4	13	3
				<i>Other</i>	<b>11</b>	<b>14</b>	<b>2</b>
				<b>TOTAL</b>	<b>201</b>	<b>393</b>	<b>342</b>

Source: GTA





## Berries—Rubus Berries

### Fresh Rubus Berries Overview

Rubus berries include **raspberries**, **blackberries** and other berries such as boysenberries and silvanberries. Production occurs all along the Eastern Seaboard of Australia, with the majority of production centred on Victoria and Tasmania.

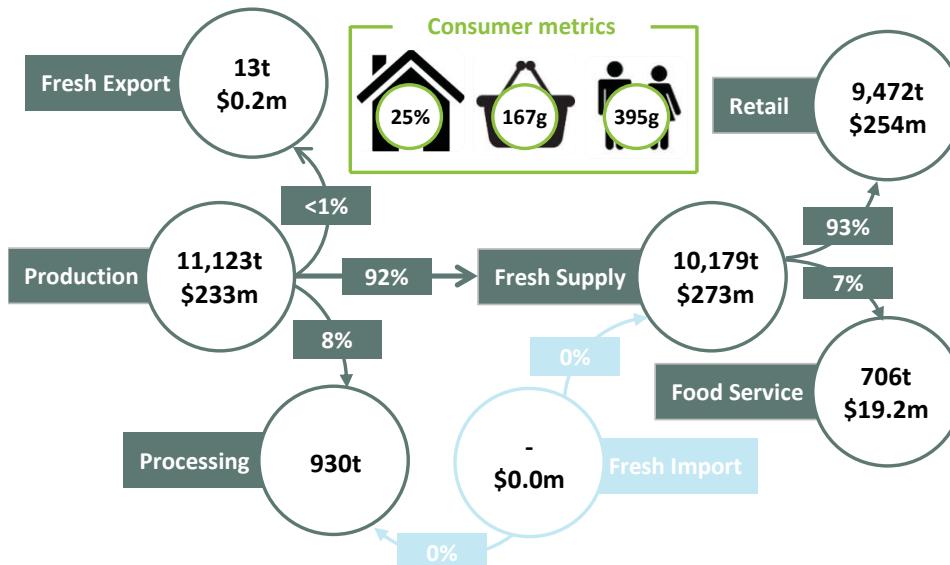
For the year ending June 2021:

- **11,123 t** was produced valued at **\$232.9 m**.
- The wholesale value of the fresh supply was **\$273.0 m** with **\$253.7 m** distributed into retail and **\$19.2 m** into food service.
- **25%** of Australian households purchased fresh rubus berries, buying an average of **167 g** per shopping trip.
- The supply per capita was **395 g**, based on the volume of supply.



## Berries—Rubus Berries

### Fresh Rubus Berries Supply Chain—Year Ending June 2021



Sources: Berries Australia (BA), AC; CFVWA; GTA; BA; MP & DD (Freshlogic Analysis)

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,478	9,932	+5%	11,123	+12%
Production (\$m)	\$ 207.5	\$ 216.0	+4%	\$ 232.9	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	8	13	+55%	13	+3%
Fresh Export Value (\$m)	\$ 0.1	\$ 0.2	>100%	\$ 0.2	-31%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	8,825	9,100	+3%	10,179	+12%
Fresh Supply Wholesale Value (\$m)	\$ 243.2	\$ 252.9	+4%	\$ 273.0	+8%
Supply per Capita (kg)	0.35	0.35	<1%	0.40	+12%
Retail Supply (t)	8,128	8,498	+5%	9,472	+11%
Retail Supply Wholesale Value (\$m)	\$ 223.8	\$ 236.0	+5%	\$ 253.7	+8%
Food Service Supply (t)	696	602	-14%	706	+17%
Food Service Wholesale Value (\$m)	\$ 19.4	\$ 16.9	-13%	\$ 19.2	+14%

Sources: BA; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Rubus Berries Production Areas

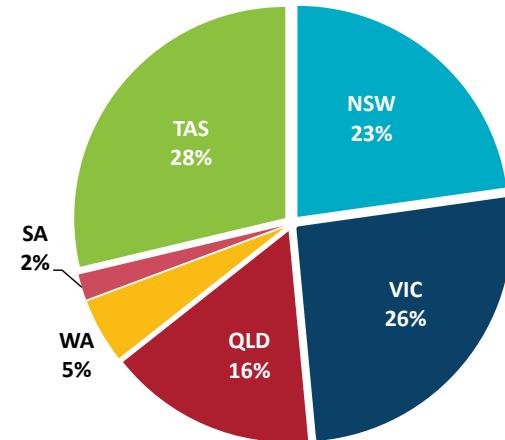


Source: BA



## Berries—Rubus Berries

2020/21 Fresh Rubus Berries Production by State



Source: BA

Fresh Rubus Berries Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,533												
Victoria	2,863												
Queensland	1,762												
Western Australia	551												
South Australia	220												
Tasmania	3,194												
Availability legend		High	Medium	Low									

Source: BA

## Main Rubus Berries Types

Production in Australia is dominated by raspberries, although blackberries are becoming increasingly common.

**Raspberries**, a bright red aggregate fruit with a hollow core. Raspberries accounted for 75% of fresh production.

**Blackberries**, a black aggregate fruit with a white core. Blackberries accounted for 25% of fresh production.

## Berries—Rubus Berries



Other varieties, including boysenberries and silvanberries, accounted for <1% of fresh production.

### Seasonality by Rubus Berry Type

The seasonal availability of some major types is profiled in the table below.

Type	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	8,292												
Blackberries	2,781												
Other	50												

Availability legend

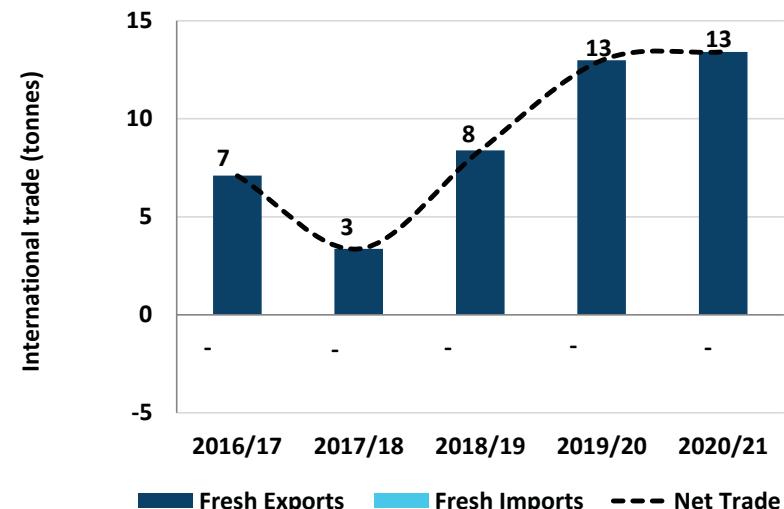
- High (Dark Green)
- Medium (Light Green)
- Low (Yellow)
- None (White)

Source: BA

## Fresh Rubus Berries International Trade

Due to the perishable nature of the fruit, there is limited trade of fresh rubus berries, compared to trade in processed and frozen rubus berries. There are currently **no fresh rubus berry imports**. The exports over the last 5 financial years are profiled in the graph below.

Net Fresh Rubus Berries International Trade



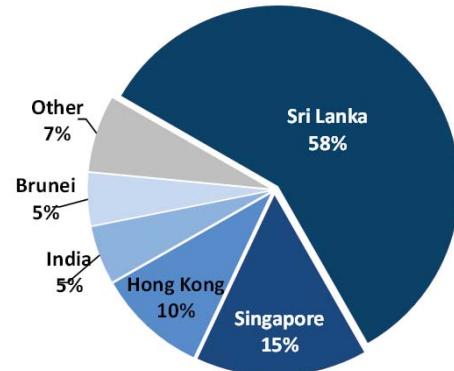
Source: GTA



## Berries—Rubus Berries

For the year ending June 2021, **58%** of exported fresh rubus berries were sent to Sri Lanka, as profiled in the chart below.

2020/21 Fresh Rubus Berries Exports by Country



Source: GTA

Fresh Rubus Berries Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021
Victoria	4	3	10
New South Wales	2	10	2
Queensland	2	< 0.5	1
Northern Territory	-	-	< 0.5
Tasmania	-	< 0.5	< 0.5
Other	< 0.5	< 0.5	< 0.5
<b>TOTAL</b>	<b>8</b>	<b>13</b>	<b>13</b>

Fresh Rubus Berries Exports by Country

Exports by country (Tonnes)			
Year Ending June	2019	2020	2021
Sri Lanka	-	-	8
Singapore	4	9	2
Hong Kong	2	1	1
India	< 0.5	< 0.5	1
Brunei	< 0.5	1	1
Other	2	1	1
<b>TOTAL</b>	<b>8</b>	<b>13</b>	<b>13</b>

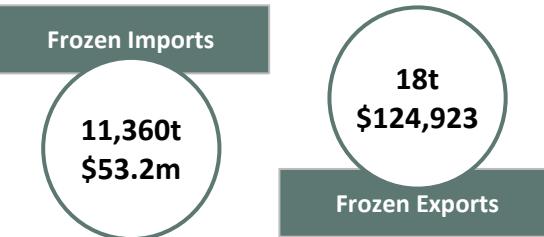
Source: GTA



## Berries—Rubus Berries

### Processed Rubus Berries International Trade

For the year ending June 2021, an additional **11,360 tonnes** of frozen rubus berries were imported, while **18 tonnes** were exported. These volumes have not been included in the fresh imports and exports profiled on page 85.



Source: GTA





## Berries—Strawberries

### Fresh Strawberries Overview

Strawberries are grown in most states in Australia. Year-round availability is made possible through the different regions.

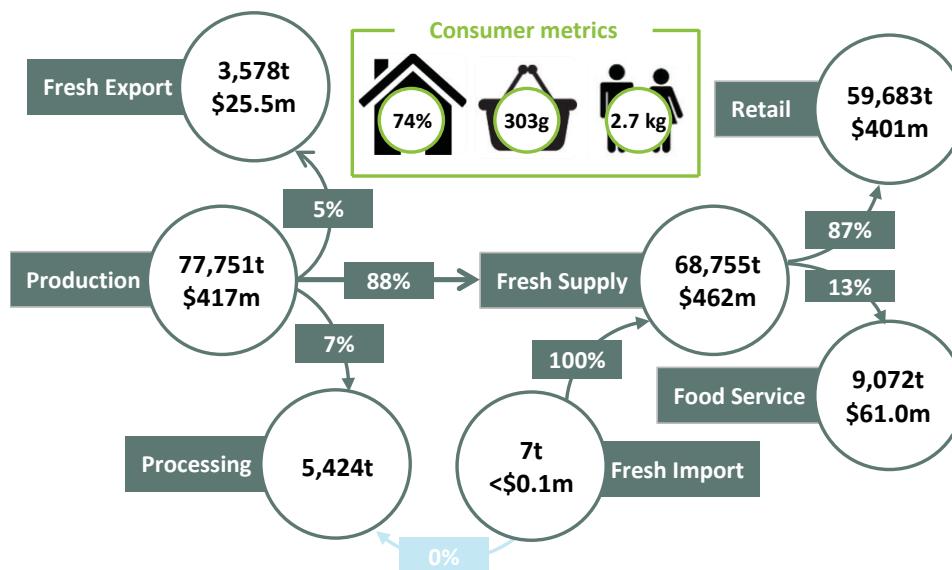
For the year ending June 2021:

- **77,751 t** was produced valued at **\$417.2 m** with **7%** sent to be processed, predominantly in preserves.
- The wholesale value of the fresh supply was **\$462.1 m** with **\$401.2 m** distributed into retail and **\$61.0 m** into food service.
- **74%** of Australian households purchased fresh strawberries, buying an average of **303 g** per shopping trip.
- The supply per capita was **2.7 kg**, based on the volume supplied.



## Berries—Strawberries

### Fresh Strawberries Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; Strawberries Australia Inc. (SAI); MP & DD (Freshlogic Analysis)

Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	76,605	82,310	+7%	77,751	-6%
Production (\$m)	\$ 392.4	\$ 435.0	+11%	\$ 417.2	-4%
Production area (Ha)	2,656	2,337	-12%	-	-
Fresh Export Volume (t)	3,685	4,678	+27%	3,578	-24%
Fresh Export Value (\$m)	\$ 24.4	\$ 33.4	+37%	\$ 25.5	-24%
Fresh Import Volume (t)	2	4	+94%	7	+83%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	< \$0.1	+74%
Fresh Supply (t)	67,577	68,166	<1%	68,755	<1%
Fresh Supply Wholesale Value (\$m)	\$ 434.2	\$ 472.6	+9%	\$ 462.1	-2%
Supply per Capita (kg)	2.68	2.64	-1%	2.67	+1%
Retail Supply (t)	57,758	59,275	+3%	59,683	<1%
Retail Supply Wholesale Value (\$m)	\$ 371.1	\$ 410.9	+11%	\$ 401.2	-2%
Food Service Supply (t)	9,819	8,891	-9%	9,072	+2%
Food Service Wholesale Value (\$m)	\$ 63.1	\$ 61.6	-2%	\$ 61.0	-1%

Sources: ABS; AC; CFVWA; GTA; SAI; MP & DD (Freshlogic Analysis)

### Major Strawberry Production Areas

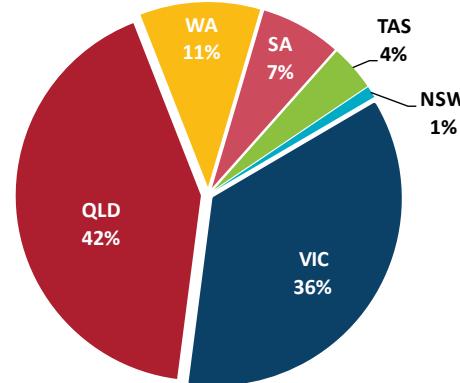


Source: SAI



## Berries—Strawberries

2020/21 Fresh Strawberries Production by State



Source: SAI

Fresh Strawberries Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	27,601												
Queensland	32,655												
Western Australia	8,164												
South Australia	5,443												
Tasmania	3,110												
New South Wales	778												
Availability legend		High	Medium	Low									

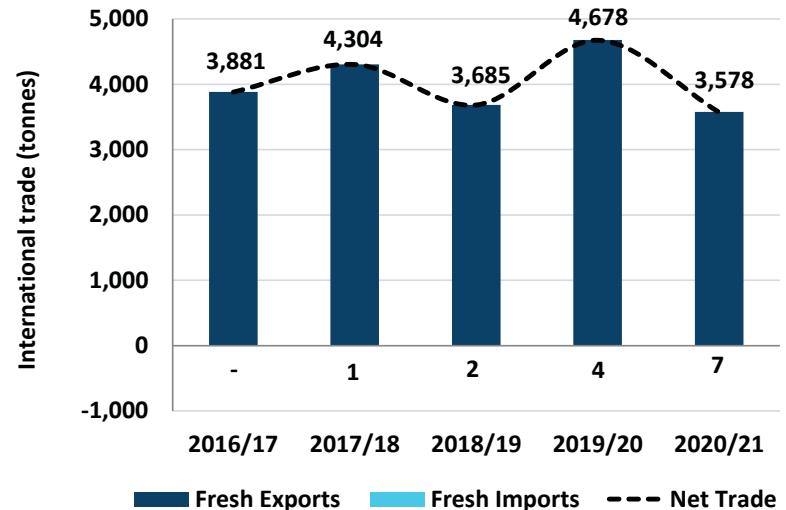
Source: SAI

Fresh Strawberries International Trade

Australia has traditionally been a net exporter of fresh strawberries. For the year ending June 2021, Australia exported **3,578 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Berries—Strawberries

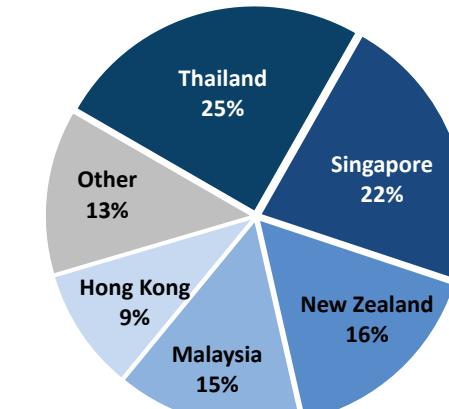
Net Fresh Strawberries International Trade



Source: GTA

For the year ending June 2021, **25%** of exported fresh strawberries were sent to Thailand, as profiled in the chart below.

2020/21 Fresh Strawberries Exports by Country



Source: GTA





## Berries—Strawberries



## Berries—Strawberries

### Fresh Strawberries Imports and Exports by State

Year Ending June	Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
South Australia	-	3	6	Western Australia	2,835	3,576	2,548
New South Wales	-	-	<0.5	Queensland	485	616	689
Victoria	<0.5	-	<0.5	New South Wales	356	419	279
Western Australia	-	<0.5	-	Victoria	8	66	59
Queensland	2	-	-	South Australia	<0.5	<0.5	2
<i>Other</i>	<i>&lt;0.5</i>	<i>&lt;0.5</i>	<i>&lt;0.5</i>	<i>Other</i>	1	<i>&lt;0.5</i>	<i>&lt;0.5</i>
<b>TOTAL</b>	<b>2</b>	<b>4</b>	<b>7</b>	<b>TOTAL</b>	<b>3,685</b>	<b>4,678</b>	<b>3,578</b>

### Fresh Strawberries Imports and Exports by Country

Year Ending June	Imports by country (Tonnes)			Exports by country (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
Chile	-	-	3	Thailand	749	951	891
Spain	-	-	3	Singapore	660	1,006	783
Sth. Korea	-	-	<0.5	New Zealand	552	675	584
Japan	-	-	<0.5	Malaysia	378	461	519
Germany	2	2	-	Hong Kong	477	468	340
<i>Other</i>	<i>&lt;0.5</i>	<i>2</i>	<i>&lt;0.5</i>	<i>Other</i>	<b>869</b>	<b>1,119</b>	<b>461</b>
<b>TOTAL</b>	<b>2</b>	<b>4</b>	<b>7</b>	<b>TOTAL</b>	<b>3,685</b>	<b>4,678</b>	<b>3,578</b>

Source: GTA

### Processed Strawberries International Trade

For the year ending June 2021, an additional **4,738 tonnes** of frozen strawberries were imported, while **77 tonnes** were exported. Australia also imported **859 tonnes** of preserved strawberries, while exporting **11 tonnes** of preserved strawberries.



Source: GTA





# Cherries

## Fresh Cherries Overview

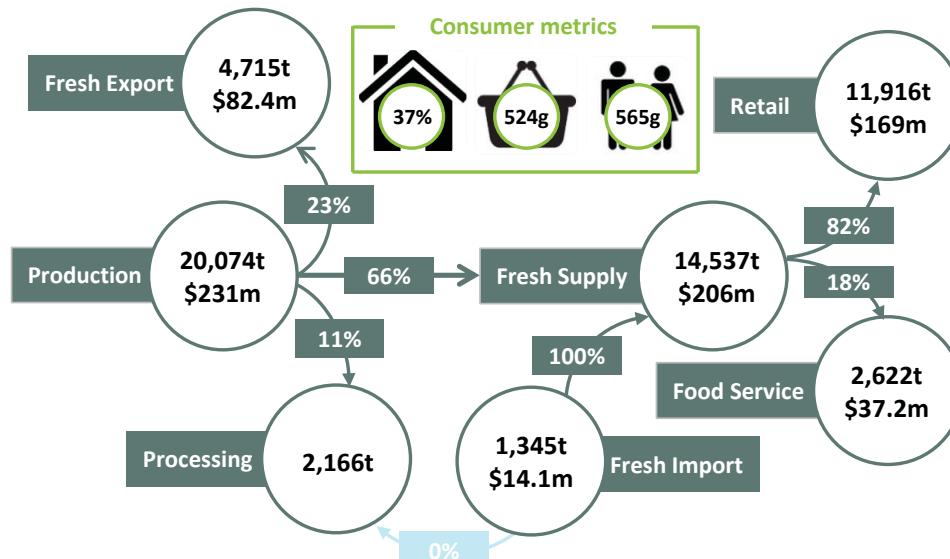
Cherries are produced during the summer months, with the majority of production occurring in the southern states of Australia.

For the year ending June 2021:

- **20,074 t** produced and valued at **\$231 m** with **11%** sent to be processed.
- The wholesale value of the fresh supply was **\$206 m**, with **\$169 m** distributed into retail and **\$37.2 m** into food service.
- **37%** of Australian households purchased fresh cherries, buying an average of **524 g** per shopping trip.
- The supply per capita was **565 g**, based on the volume supplied.



## Fresh Cherries Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; Cherry Growers Australia Inc. (CGAI); GTA; MP & DD (Freshlogic Analysis)

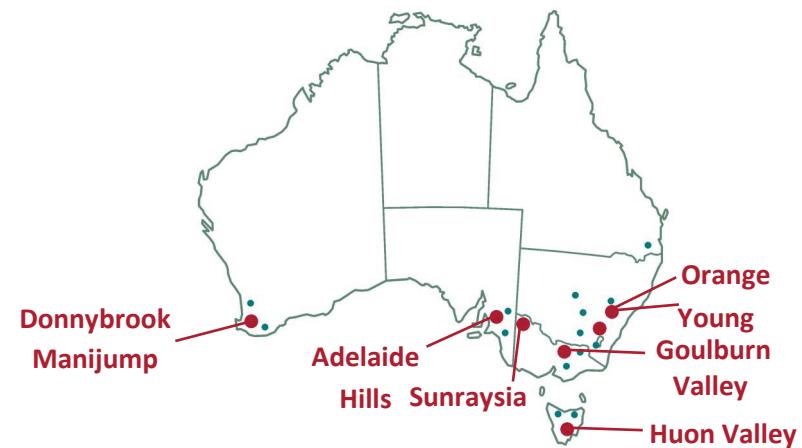
# Cherries



Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	
Production (t)	20,147	14,720	-27%	20,074	+36%
Production (\$m)	\$ 189.3	\$ 184.0	-3%	\$ 231.3	+26%
Producing Trees (000 Trees)	2,165	2,184	<1%	-	-
Fresh Export Volume (t)	5,035	4,460	-11%	4,715	+6%
Fresh Export Value (\$m)	\$ 79.5	\$ 81.7	+3%	\$ 82.4	<1%
Fresh Import Volume (t)	2,425	1,954	-19%	1,345	-31%
Fresh Import Value (\$m)	\$ 17.6	\$ 17.1	-3%	\$ 14.1	-17%
Fresh Supply (t)	15,379	11,124	-28%	14,537	+31%
Fresh Supply Wholesale Value (\$m)	\$ 167.6	\$ 161.7	-4%	\$ 206.0	+27%
Supply per Capita (kg)	0.61	0.43	-29%	0.56	+31%
Retail Supply (t)	12,503	9,673	-23%	11,916	+23%
Retail Supply Wholesale Value (\$m)	\$ 136.3	\$ 140.6	+3%	\$ 168.9	+20%
Food Service Supply (t)	2,876	1,451	-50%	2,622	+81%
Food Service Wholesale Value (\$m)	\$ 31.3	\$ 21.1	-33%	\$ 37.2	+76%

Sources: ABS; AC; CFVWA; CGAI; GTA; MP & DD (Freshlogic Analysis)

## Major Cherry Production Areas

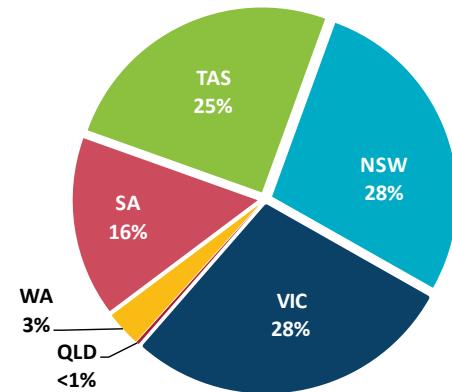


Source: CGAI



## Cherries

2020/21 Fresh Cherries Production by State



Source: CGAI

Fresh Cherries Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	5,661												
New South Wales	5,550												
Tasmania	5,038												
South Australia	3,152												
Western Australia	622												
Queensland	50												
Imports	1,345												
Availability legend		High	Medium	Low									

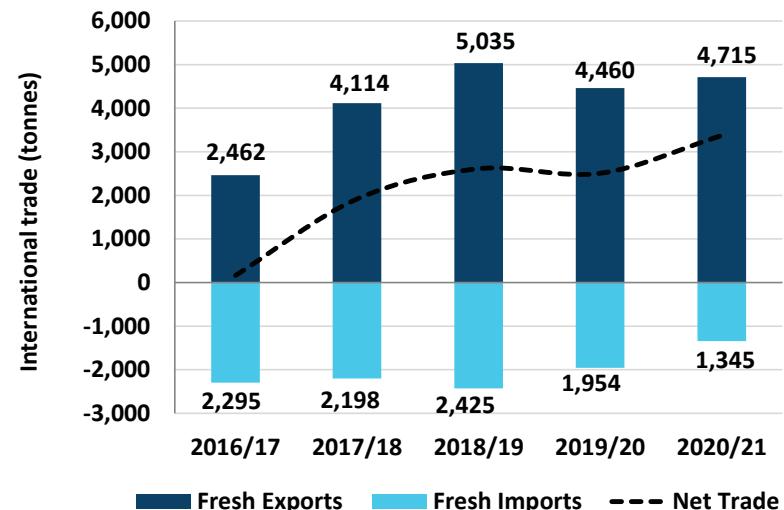
Source: CGAI

## Fresh Cherries International Trade

Australia is now a net exporter of fresh cherries, after recent increases to export volumes, with the majority of this volume exported to China and Hong Kong. For the year ending June 2021, Australia imported **1,345 tonnes** of fresh cherries primarily from the United States, and exported **4,715 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Cherries

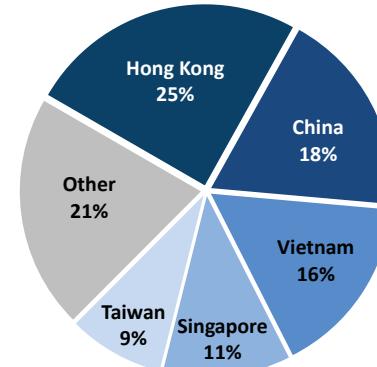
Net Fresh Cherry International Trade



Source: GTA

For the year ending June 2021, **24%** of exported fresh cherries were sent to Hong Kong, as profiled in the chart below.

2020/21 Fresh Cherries Exports by Country





## Cherries

### Fresh Cherries Imports and Exports by State

Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)		
Year Ending June	2019	2020	2021	Year Ending June	2019
New South Wales	1,482	1,180	987	Tasmania	1,896
Victoria	474	394	185	Victoria	1,986
Western Australia	215	192	116	New South Wales	1,050
Queensland	255	188	57	South Australia	73
<b>TOTAL</b>	<b>2,425</b>	<b>1,954</b>	<b>1,345</b>	Queensland	11
				<i>Other</i>	19
				<b>TOTAL</b>	<b>5,035</b>
					<b>4,460</b>
					<b>4,715</b>

### Fresh Cherries Imports and Exports by Country

Imports by country (Tonnes)			Exports by country (Tonnes)		
Year Ending June	2019	2020	2021	Year Ending June	2019
US	2,424	1,951	1,345	Hong Kong	915
New Zealand	1	3	-	China	1,593
Serbia	< 0.5	-	-	Vietnam	598
<i>Other</i>	< 0.5	-	-	Singapore	587
<b>TOTAL</b>	<b>2,425</b>	<b>1,954</b>	<b>1,345</b>	Taiwan	313
				<i>Other</i>	1,030
				<b>TOTAL</b>	<b>5,035</b>
					<b>4,460</b>
					<b>4,715</b>

Source: GTA



### Processed Cherries International Trade

For the year ending June 2021, an additional **2,361 kilolitres** of preserved cherries in liquid were imported, while **3 tonnes** of preserved cherries were exported.



Source: GTA





## Citrus Fruit—Overview



### Fresh Citrus Fruit Overview

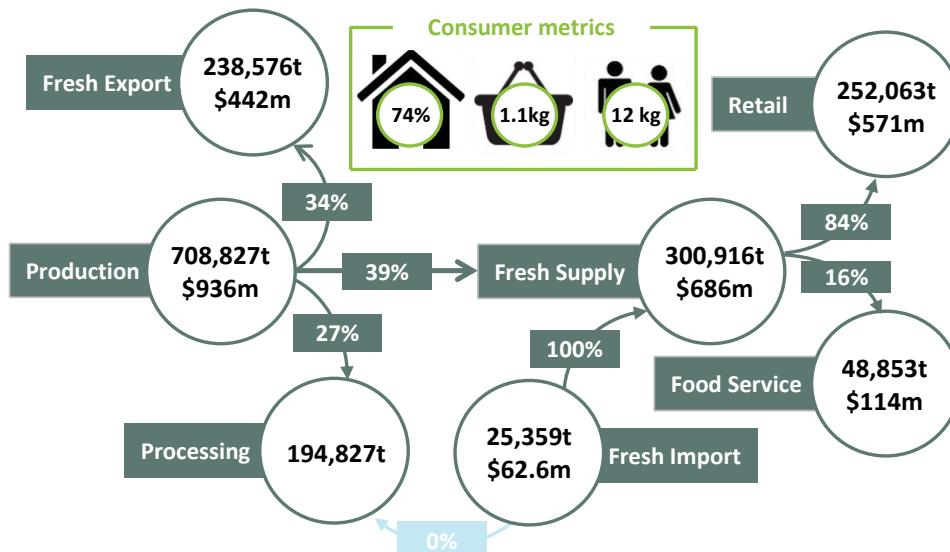
Pages 100-101 profile total citrus fruit production and trade. They combine information on grapefruit, lemons/limes, mandarins and oranges. The following pages profile each citrus fruit category in more detail.

For the year ending June 2021:

- **708,827 t** was produced valued at **\$936.3 m**.
- The wholesale value of the fresh supply was **\$668 m** with **\$571 m** distributed into retail and **\$114 m** into food service.
- **74%** of Australian households purchased a citrus fruit, buying an average of **1.1 kg** per shopping trip.
- The supply per capita of citrus for the year ending June 2021 was **11 kg**, based on the volume supplied.



### Fresh Citrus Fruit Supply Chain—Year Ending June 2021



Sources: AC; Citrus Australia (CA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Citrus Fruit—Overview

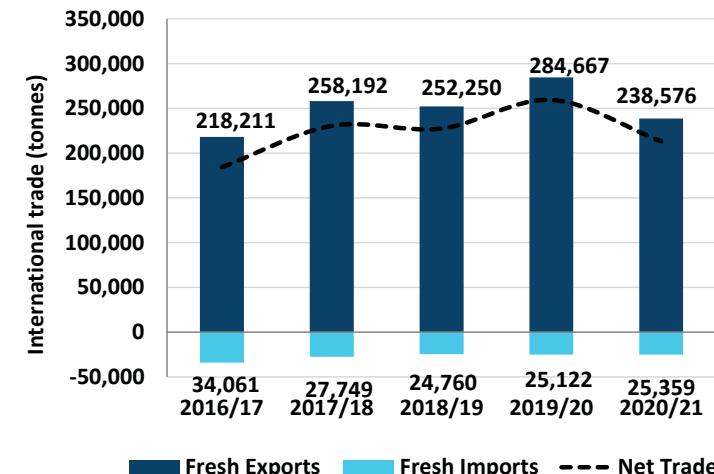
Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	762,520	767,766	<1%	708,827	-8%
Production (\$m)	\$ 875.2	\$ 942.4	+8%	\$ 936.3	>-1%
Producing Trees (000 Trees)	11,091	10,961	-1%	11,276	+3%
Fresh Export Volume (t)	252,250	284,667	+13%	238,576	-16%
Fresh Export Value (\$m)	\$ 457.1	\$ 508.5	+11%	\$ 441.5	-13%
Fresh Import Volume (t)	24,760	25,122	+1%	25,359	<1%
Fresh Import Value (\$m)	\$ 54.1	\$ 60.0	+11%	\$ 62.6	+4%
Fresh Supply (t)	311,048	301,866	-3%	300,916	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 592.6	\$ 619.0	+4%	\$ 685.6	+11%
Supply per Capita (kg)	12.34	11.70	-5%	11.69	>-1%
Retail Supply (t)	256,472	253,488	-1%	252,063	>-1%
Retail Supply Wholesale Value (\$m)	\$ 482.5	\$ 516.6	+7%	\$ 571.1	+11%
Food Service Supply (t)	54,577	48,379	-11%	48,853	<1%
Food Service Wholesale Value (\$m)	\$ 110.1	\$ 102.4	-7%	\$ 114.5	+12%

Sources: ABS; AC; CA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

\*Note: Figures have been modified from those published in the previous edition of the handbook (2019/20 edition).

### Fresh Citrus Fruit International Trade

Net Fresh Citrus International Trade



Source: GTA

\*Note: this includes some smaller citrus categories not profiled in the following pages.



## Citrus Fruit—Grapefruit



### Fresh Grapefruit Overview

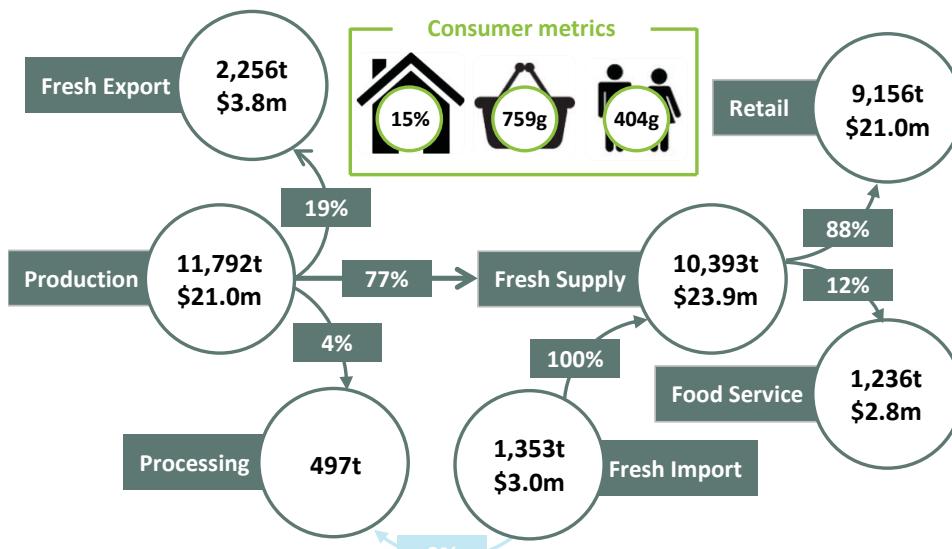
Grapefruit production occurs predominantly in the Murray Valley region. Imports, as well as production from Western Australia and the Northern Territory, allow for close to year round availability.

For the year ending June 2021:

- **11,792 t** was produced valued at **\$21.0 m** with **4%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$23.9 m** with **\$21.0 m** distributed into retail and **\$2.8 m** into food service.
- **15%** of Australian households purchased grapefruit, buying an average of **759 g** per shopping trip.
- The supply per capita was **404 g**, based on the volume supplied.



### Fresh Grapefruit Fresh Supply Chain—Year Ending June 2021



Sources: AC; Citrus Australia (CA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Citrus Fruit—Grapefruit

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,133	12,055	+8%	11,792	-2%
Production (\$m)	\$ 16.1	\$ 18.4	+14%	\$ 21.0	+14%
Producing Trees (000 Trees)	136	122	-10%	120	-2%
Fresh Export Volume (t)	1,203	1,706	+42%	2,256	+32%
Fresh Export Value (\$m)	\$ 2.1	\$ 2.7	+33%	\$ 3.8	+39%
Fresh Import Volume (t)	1,221	1,022	-16%	1,353	+32%
Fresh Import Value (\$m)	\$ 2.4	\$ 2.4	<1%	\$ 3.0	+26%
Fresh Supply (t)	10,680	10,863	+2%	10,393	-4%
Fresh Supply Wholesale Value (\$m)	\$ 19.0	\$ 20.8	+9%	\$ 23.9	+15%
Supply per Capita (kg)	0.42	0.42	>-1%	0.40	-4%
Retail Supply (t)	9,287	9,613	+4%	9,156	-5%
Retail Supply Wholesale Value (\$m)	\$ 16.5	\$ 18.4	+11%	\$ 21.0	+14%
Food Service Supply (t)	1,393	1,250	-10%	1,236	-1%
Food Service Wholesale Value (\$m)	\$ 2.5	\$ 2.4	-4%	\$ 2.8	+19%

Sources: AC; CA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Grapefruit Production Areas

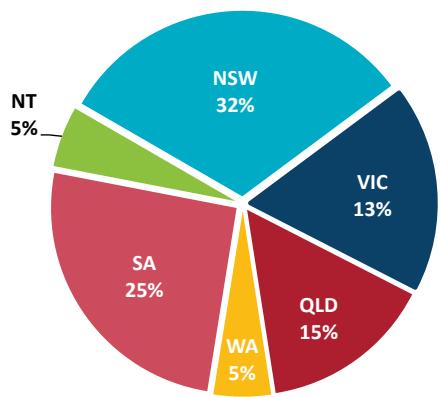


Source: CA



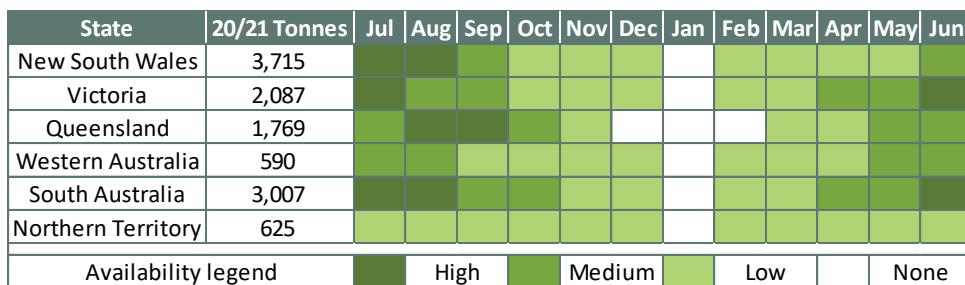
## Citrus Fruit—Grapefruit

### 2020/21 Fresh Grapefruit Production by State



Source: CA

### Fresh Grapefruit Seasonality by State



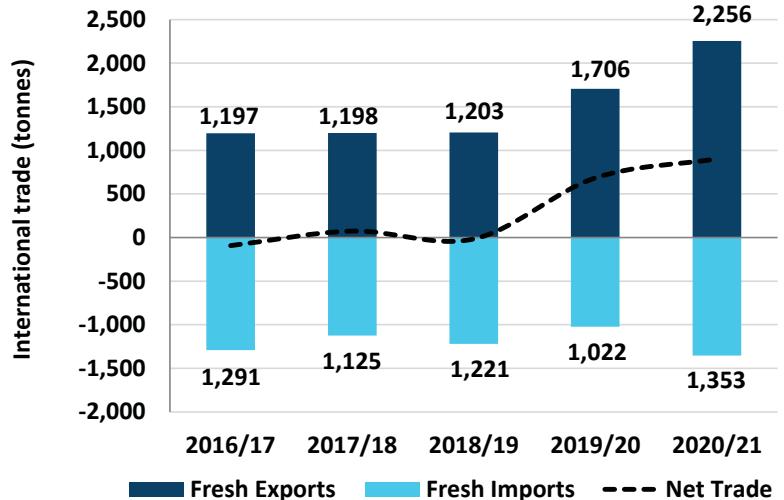
Source: CA

### Fresh Grapefruit International Trade

Australia has traditionally been a net importer of fresh grapefruit, typically importing **1,000+ tonnes** per year. Exports have been growing in the last 5 years. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Citrus Fruit—Grapefruit

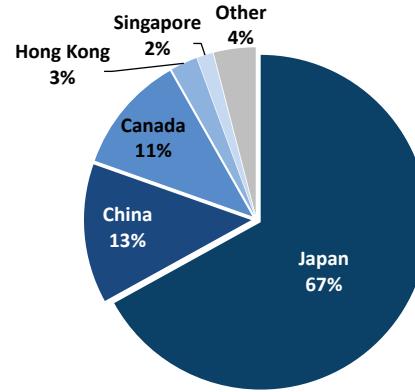
### Net Fresh Grapefruit International Trade



Source: GTA

For the year ending June 2021 **67%** of exported fresh grapefruit was sent to Japan, as profiled in the chart below.

### 2020/21 Fresh Grapefruit Exports by Country



Source: GTA





## Fresh Grapefruit Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Victoria	524	496	609	South Australia	851	1,003	1,199
New South Wales	319	318	423	New South Wales	260	486	807
Western Australia	362	209	320	Victoria	89	206	240
Queensland	9	-	-	Queensland	4	11	9
South Australia	6	-	-	Western Australia	-	< 0.5	< 0.5
<b>TOTAL</b>	<b>1,221</b>	<b>1,022</b>	<b>1,353</b>	<i>Other</i>	<i>&lt; 0.5</i>	<i>&lt; 0.5</i>	<i>1</i>
				<b>TOTAL</b>	<b>1,203</b>	<b>1,706</b>	<b>2,256</b>

## Fresh Grapefruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
US	683	699	847	Japan	894	1,019	1,511
Israel	392	280	340	China	-	291	303
Egypt	144	42	166	Canada	199	216	257
Iran	-	-	<0.5	Hong Kong	<0.5	<0.5	59
China	-	-	<0.5	Singapore	1	15	35
<i>Other</i>	<b>1</b>	<b>1</b>	<b>&lt;0.5</b>	<i>Other</i>	<b>109</b>	<b>166</b>	<b>91</b>
<b>TOTAL</b>	<b>1,221</b>	<b>1,022</b>	<b>1,353</b>	<b>TOTAL</b>	<b>1,203</b>	<b>1,706</b>	<b>2,256</b>

*Source: GTA*

# Processed Grapefruit International Trade

For the year ending June 2021, an additional **107 tonnes** of solid grapefruit juice were imported, while **795 kilolitres** were exported.



Source: GTA



## Citrus Fruit—Lemons/Limes

### Fresh Lemons/Limes

#### Overview

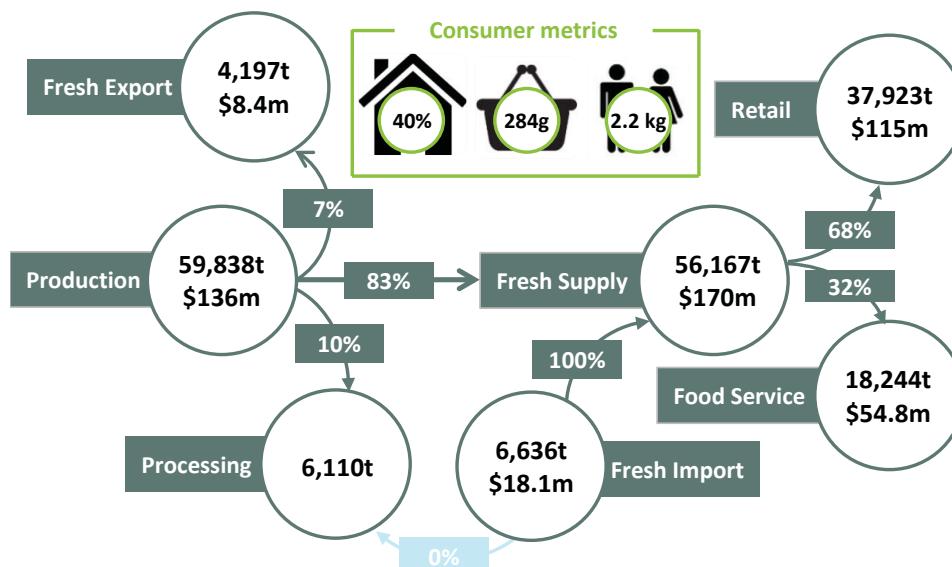
Lemons and limes are grown across Australia, with major production in Queensland with a significant volume also grown in the Sunraysia and Riverland areas around the border of South Australia, Victoria and New South Wales.

For the year ending June 2021:

- **59,838 t** was produced valued at **\$135.8 m** with **10%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$169.6 m** with **\$114.8 m** distributed into retail and **\$54.8 m** into foodservice.
- **40%** of Australian households purchased fresh lemons or limes, buying an average of **284 g** per shopping trip.
- The supply per capita was **2.2 kg**, based on the volume supplied.



#### Fresh Lemons/Limes Supply Chain—Year Ending June 2021



Sources: AC; Citrus Australia (CA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Citrus Fruit—Lemons/Limes



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	66,378	71,432	+8%	59,838	-16%
Production (\$m)	\$ 161.7	\$ 152.3	-6%	\$ 135.8	-11%
Producing Trees (000 Trees)	561	645	+15%	669	+4%
Fresh Export Volume (t)	3,394	4,206	+24%	4,197	>-1%
Fresh Export Value (\$m)	\$ 7.2	\$ 7.9	+10%	\$ 8.4	+6%
Fresh Import Volume (t)	4,403	3,902	-11%	6,636	+70%
Fresh Import Value (\$m)	\$ 12.5	\$ 10.3	-17%	\$ 18.1	+76%
Fresh Supply (t)	61,513	64,205	+4%	56,167	-13%
Fresh Supply Wholesale Value (\$m)	\$ 195.8	\$ 180.6	-8%	\$ 169.6	-6%
Supply per Capita (kg)	2.44	2.49	+2%	2.18	-12%
Retail Supply (t)	42,065	44,280	+5%	37,923	-14%
Retail Supply Wholesale Value (\$m)	\$ 133.8	\$ 124.5	-7%	\$ 114.8	-8%
Food Service Supply (t)	19,448	19,926	+2%	18,244	-8%
Food Service Wholesale Value (\$m)	\$ 62.0	\$ 56.0	-10%	\$ 54.8	-2%

Sources: AC; CA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

\*Note: Figures have been modified from those published in the previous edition of the handbook (2019/20 edition).

#### Major Lemons/Limes Production Areas

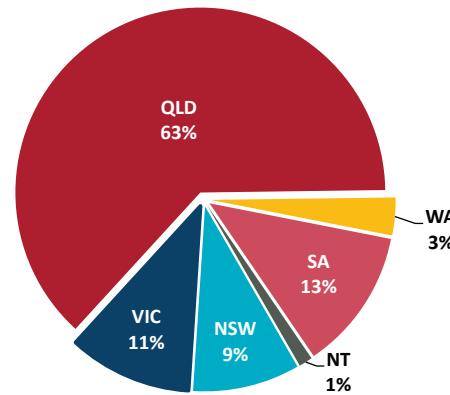


Source: CA



## Citrus Fruit—Lemons/Limes

2020/21 Fresh Lemons/Limes Production by State



Source: CA

Fresh Lemons/Limes Seasonality by State.

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,605												
Victoria	6,440												
Queensland	37,692												
Western Australia	1,976												
South Australia	7,409												
Northern Territory	716												
Imported	6,636												
Availability legend		High	Medium	Low									

Source: CA

## Main Lemons/Limes Category

For the year ending June 2021:

Lemons accounted for 70% of fresh production.

Limes accounted for 30% of fresh production.

## Citrus Fruit—Lemons/Limes

Seasonality by Lemons/Limes Category

The seasonal availability of lemons and limes is profiled in the table below.

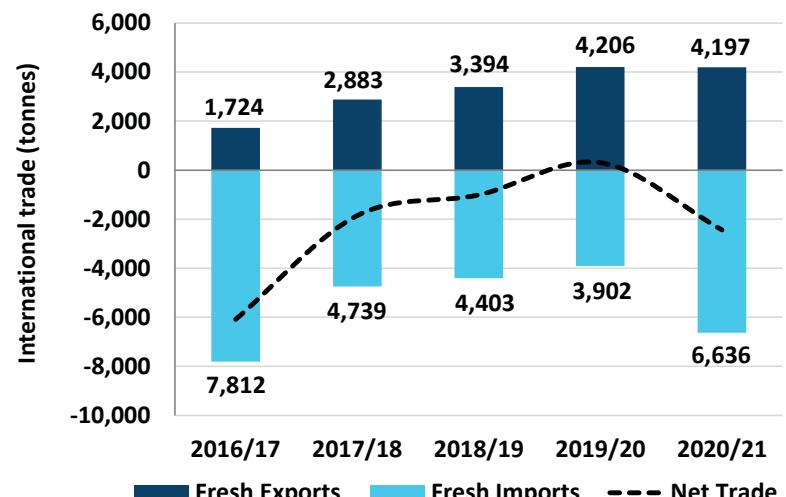
Variety	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	41,724												
Limes	18,115												
Availability legend		High	Medium	Low									

Source: CA

## Fresh Lemons/Limes International Trade

Australia has traditionally been a net importer of lemons and limes, with a significant amount of imports being sourced from the US and Egypt. Exports have been growing in the last 5 years. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Lemons/Limes International Trade



Source: GTA



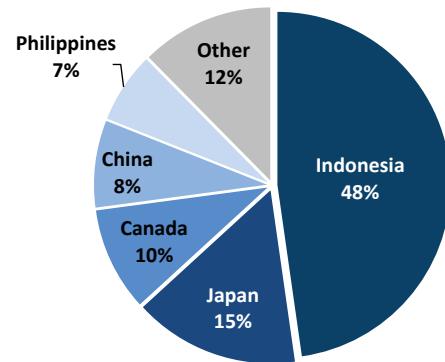


## Citrus Fruit—Lemons/Limes



For the year ending June 2021, **48%** of exported fresh lemons and limes were sent to Indonesia, as profiled in the chart below.

### 2020/21 Fresh Lemons/Limes Exports by Country



Source: GTA

### Fresh Lemons/Limes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Victoria	1,789	1,176	2,677	South Australia	1,251	1,237	1,567
New South Wales	1,664	2,021	2,385	Victoria	764	1,190	1,426
Western Australia	726	589	1,071	Queensland	744	1,129	644
Queensland	127	117	503	New South Wales	616	639	554
South Australia	98	-	-	Western Australia	11	10	7
<b>TOTAL</b>	<b>4,403</b>	<b>3,902</b>	<b>6,636</b>	<b>Other</b>	<b>8</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>3,394</b>	<b>4,206</b>	<b>4,197</b>

## Citrus Fruit—Lemons/Limes



### Fresh Lemons/Limes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
US	3,283	2,646	4,273	Indonesia	1,158	1,761	2,004
Egypt	957	1,063	2,168	Japan	164	131	649
Spain	113	189	187	Canada	602	699	406
UAE	4	-	3	China	162	484	341
Iran	1	4	2	Philippines	352	350	277
<b>Other</b>	<b>46</b>	<b>-</b>	<b>3</b>	<b>Other</b>	<b>956</b>	<b>781</b>	<b>520</b>
<b>TOTAL</b>	<b>4,403</b>	<b>3,902</b>	<b>6,636</b>	<b>TOTAL</b>	<b>3,394</b>	<b>4,206</b>	<b>4,197</b>

Source: GTA



## Citrus—Mandarins



### Fresh Mandarins Overview

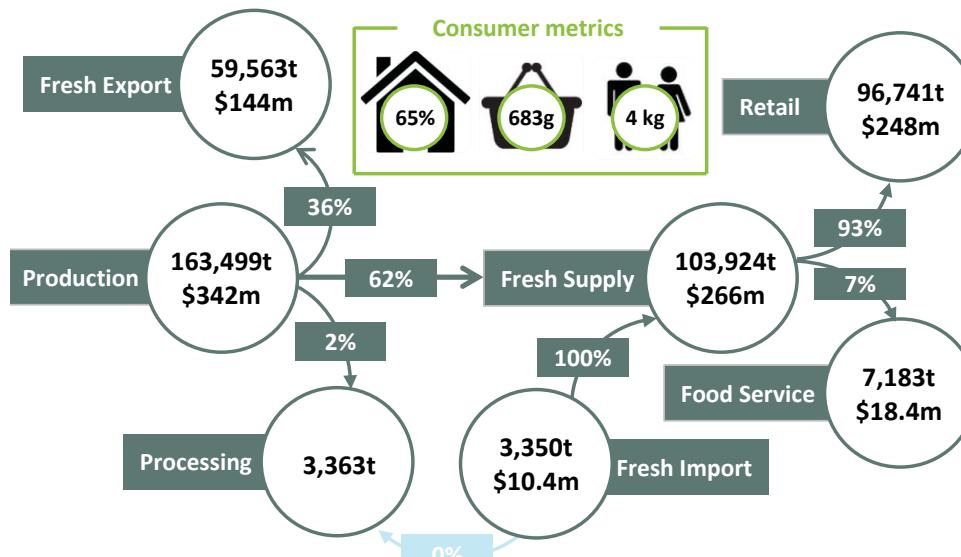
Mandarin production occurs across most states in Australia. Mandarins grow during the winter months.

For the year ending June 2021:

- **163,499 t** was produced valued at **\$341.9 m** with **2%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$266.3 m** with **\$247.9 m** distributed into retail and **\$18.4 m** into food service.
- **65%** of Australian households purchased fresh mandarins, buying an average of **683 g** per shopping trip.
- The supply per capita was **4.0 kg**, based on the volume supplied.



### Fresh Mandarins Supply Chain—Year Ending June 2021



Sources: AC; Citrus Australia (CA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Citrus—Mandarins

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	156,914	172,934	+10%	163,499	-5%
Production (\$m)	\$ 298.6	\$ 357.0	+20%	\$ 341.9	-4%
Producing Trees (000 Trees)	2,742	2,636	-4%	2,846	+8%
Fresh Export Volume (t)	59,471	77,316	+30%	59,563	-23%
Fresh Export Value (\$m)	\$ 139.4	\$ 187.2	+34%	\$ 143.8	-23%
Fresh Import Volume (t)	4,612	3,360	-27%	3,350	>-1%
Fresh Import Value (\$m)	\$ 11.7	\$ 10.5	-10%	\$ 10.4	>-1%
Fresh Supply (t)	98,978	95,587	-3%	103,924	+9%
Fresh Supply Wholesale Value (\$m)	\$ 221.7	\$ 240.6	+9%	\$ 266.3	+11%
Supply per Capita (kg)	3.93	3.70	-6%	4.04	+9%
Retail Supply (t)	91,859	89,334	-3%	96,741	+8%
Retail Supply Wholesale Value (\$m)	\$ 205.7	\$ 224.8	+9%	\$ 247.9	+10%
Food Service Supply (t)	7,119	6,253	-12%	7,183	+15%
Food Service Wholesale Value (\$m)	\$ 15.9	\$ 15.7	-1%	\$ 18.4	+17%

Sources: ABS; AC; CA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Mandarins Production Areas

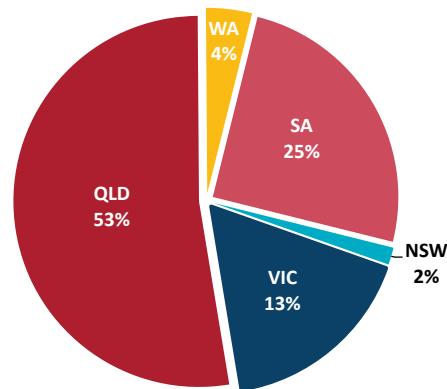


Source: CA



## Citrus—Mandarins

### 2020/21 Fresh Mandarins Production by State



Sources: CA

### Fresh Mandarins Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,452												
Victoria	27,795												
Queensland	85,837												
Western Australia	6,540												
South Australia	40,875												
Availability legend		High	Medium	Low									

Source: CA

### Main Mandarins Varieties

There are a number of varieties grown in Australia, but production for the fresh market is dominated by 3 main varieties. These include:

**Murcott** (including **Honey Murcott** and **Low Seeded Murcott**), a seeded yellow-orange mandarin. Murcott mandarins accounted for **29%** of fresh production.

**Imperial mandarins**, an early season mandarin with fine smooth glossy skin and a low seed count. Imperial mandarins accounted for **24%** of fresh production for the year ending June 2021.

**Afouer**, a mostly seedless variety, accounted for **23%** of fresh production.

## Citrus—Mandarins

### Seasonality by Mandarins Variety

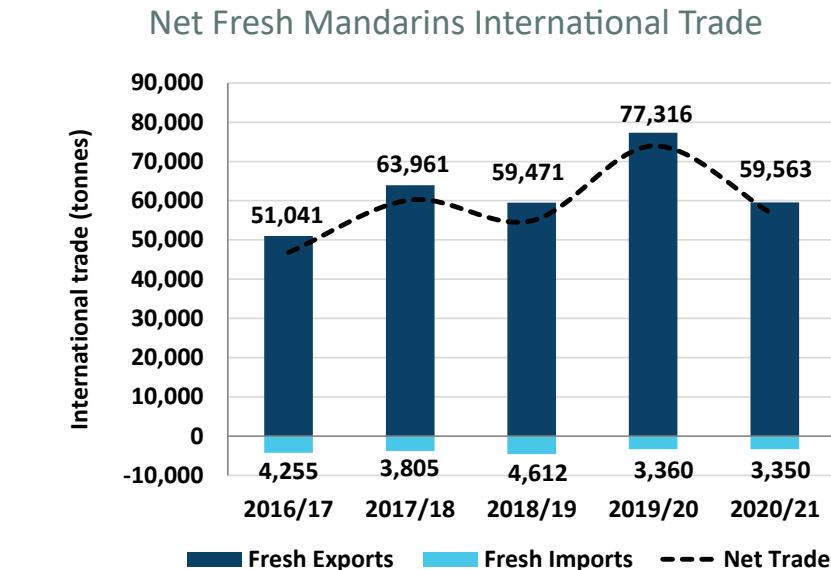
The seasonal availability of some major varieties is profiled in the table below.

Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Murcott	46,440												
Imperial	38,433												
Afouer	36,831												
<i>Others</i>	<b>38,433</b>												
<b>Processing</b>	<b>3,363</b>												
Availability legend		High	Medium	Low									

Source: CA

### Fresh Mandarins International Trade

Australia is a net exporter of fresh mandarins, over the last three years an average of **64,450 tonnes** were exported per year. For the year ending June 2021, Australia exported **59,563 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

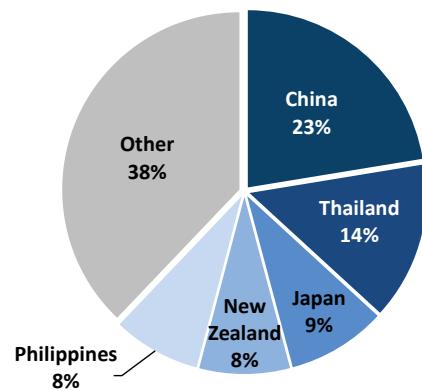




## Citrus—Mandarins

Australia exports to a number of countries. For the year ending June 2021, **23%** of exported mandarins were sent to China, as profiled in the chart below.

2020/21 Fresh Mandarins Export by Country



Source: GTA

Fresh Mandarins Imports and Exports by State

Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)		
Year Ending June	2019	2020	2021	Year Ending June	2019
New South Wales	1,435	1,776	1,470	Queensland	36,820
Victoria	1,425	1,004	1,221	South Australia	16,956
Western Australia	1,266	513	586	Victoria	4,377
Queensland	462	62	74	New South Wales	1,185
South Australia	23	4	-	Western Australia	132
<b>TOTAL</b>	<b>4,612</b>	<b>3,360</b>	<b>3,350</b>	<b>Other</b>	<b>1</b>
				<b>TOTAL</b>	<b>59,471</b>
					<b>77,316</b>
					<b>59,563</b>

Fresh Mandarins Imports and Exports by Country

Imports by country (Tonnes)			Exports by country (Tonnes)		
Year Ending June	2019	2020	2021	Year Ending June	2019
US	2,171	2,488	2,557	China	16,059
Egypt	2,006	780	615	Thailand	7,482
Israel	370	91	79	Japan	4,051
New Zealand	1	1	1	New Zealand	3,673
China	< 0.5	< 0.5	-	Philippines	3,058
<b>Other</b>	<b>64</b>	<b>&lt; 0.5</b>	<b>98</b>	<b>Other</b>	<b>25,148</b>
<b>TOTAL</b>	<b>4,612</b>	<b>3,360</b>	<b>3,350</b>	<b>TOTAL</b>	<b>59,471</b>
					<b>77,316</b>
					<b>59,563</b>

Source: GTA

## Citrus—Mandarins



### 2020/21 Australian Horticulture Statistics Handbook



## Citrus—Oranges

### Fresh Oranges Overview

Orange production occurs predominantly in the southern states of Australia. Production is dominated by 2 main varieties; Navel oranges, available during the winter months, and Valencia oranges, available during the summer months.

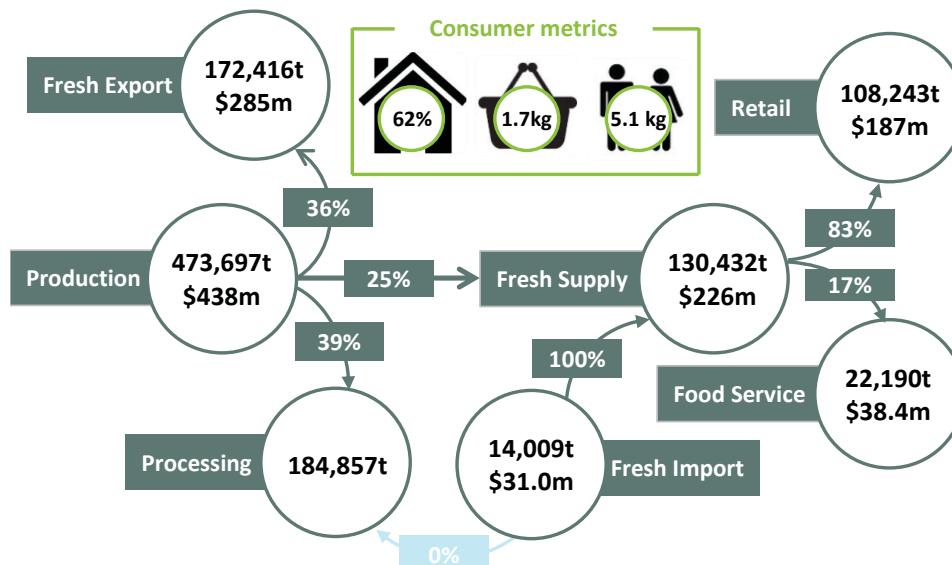
For the year ending June 2021:

- **473,697 t** was produced valued at **\$437.6 m** with **39%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$225.8 m** with **\$187.4 m** distributed into retail and **\$38.4 m** into food service.
- **62%** of Australian households purchased fresh oranges, buying an average of **1.7 kg** per shopping trip.
- The supply per capita was **5.1 kg**, based on the volume supplied.



## Citrus—Oranges

### Fresh Orange Supply Chain—Year Ending June 2021



Sources: AC; Citrus Australia (CA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	528,095	511,345	-3%	473,697	-7%
Production (\$m)	\$ 398.8	\$ 414.7	+4%	\$ 437.6	+6%
Producing Trees (000 Trees)	7,652	7,558	-1%	7,637	+1%
Fresh Export Volume (t)	188,056	201,268	+7%	172,416	-14%
Fresh Export Value (\$m)	\$ 308.1	\$ 310.1	<1%	\$ 285.1	-8%
Fresh Import Volume (t)	14,523	16,834	+16%	14,009	-17%
Fresh Import Value (\$m)	\$ 27.5	\$ 36.7	+33%	\$ 31.0	-16%
Fresh Supply (t)	139,877	131,211	-6%	130,432	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 156.2	\$ 177.1	+13%	\$ 225.8	+27%
Supply per Capita (kg)	5.55	5.09	-8%	5.07	>-1%
Retail Supply (t)	113,260	110,262	-3%	108,243	-2%
Retail Supply Wholesale Value (\$m)	\$ 126.5	\$ 148.9	+18%	\$ 187.4	+26%
Food Service Supply (t)	26,616	20,950	-21%	22,190	+6%
Food Service Wholesale Value (\$m)	\$ 29.7	\$ 28.3	-5%	\$ 38.4	+36%

Sources: ABS; AC; CA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Orange Production Areas

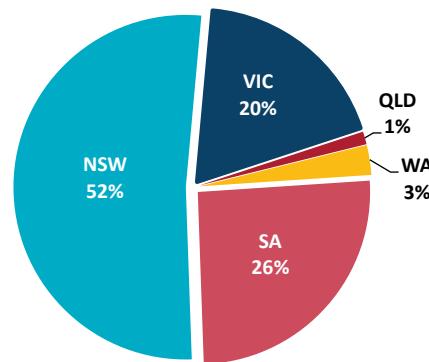


Source: CA



## Citrus—Oranges

### 2020/21 Fresh Oranges Production by State



Source: CA

### Fresh Oranges Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	246,322												
Victoria	87,634												
Queensland	5,684												
Western Australia	13,264												
South Australia	120,793												
Availability legend		High	Medium	Low									

Source: CA

### Main Orange Varieties

Production is dominated by two main varieties, as indicated below:

**Navel oranges**, an orange that grows during the winter months. The majority of navels grown are destined for the fresh market, and accounted for **85%** of the production sent to the **fresh market**.

**Valencia oranges**, an orange that grows during the summer months. The majority of Valencias grown are destined for the juicing market, and accounted for **12%** of **fresh production** but contributed the majority of processed production.

Other varieties, including blood oranges and Cara Cara oranges, accounted for **less than 4% of fresh production**.

## Citrus—Oranges



### Seasonality by Orange Variety

The seasonal availability of some major varieties is profiled in the table below.

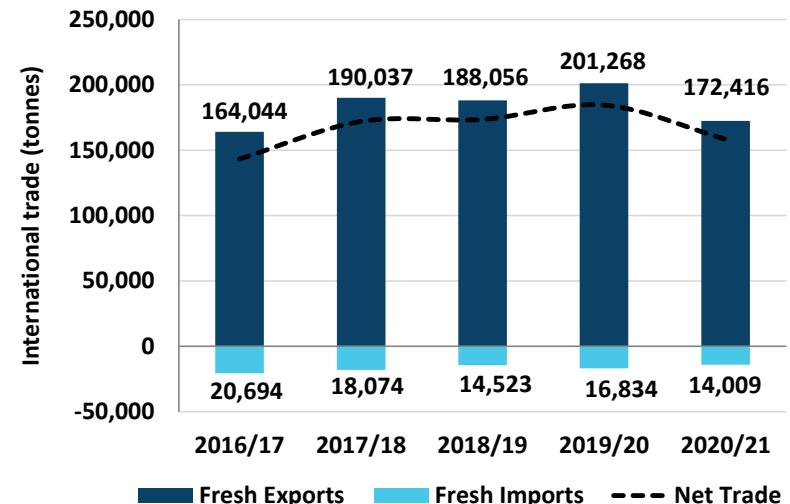
Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	245,514												
Valencia	33,217												
<i>Other</i>	<b>10,109</b>												
<b>Processing</b>	<b>184,857</b>												
Availability legend		High	Medium	Low									

Source: CA

### Fresh Oranges International Trade

Australia is a net exporter of fresh oranges, growth in volumes over the last three years has in an average of **187,247 tonnes** exported per year. For the year ending June 2021, Australia exported **172,416 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

#### Net Fresh Oranges International Trade



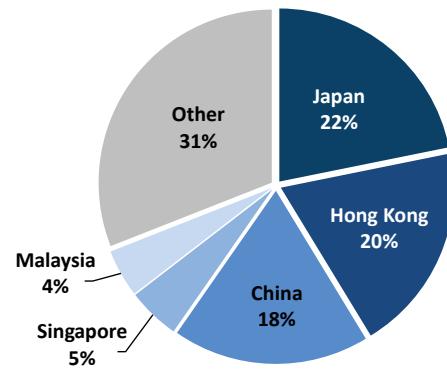
Source: GTA



## Citrus—Oranges

For the year ending June 2021, **22%** of exported fresh oranges were sent to Japan, as profiled in the chart below.

2020/21 Fresh Oranges Exports by Country



Source: GTA

Fresh Oranges Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	5,232	7,002	6,320	Victoria	89,138	96,869	82,451
Victoria	5,806	5,772	5,513	South Australia	60,347	65,355	57,724
Western Australia	1,700	2,260	2,057	New South Wales	34,787	34,155	27,704
Queensland	1,693	1,704	119	Western Australia	1,730	3,274	3,449
South Australia	91	96	-	Queensland	2,054	1,593	1,065
<i>Other</i>	< 0.5	< 0.5	< 0.5	<i>Other</i>	< 0.5	21	23
<b>TOTAL</b>	<b>14,523</b>	<b>16,834</b>	<b>14,009</b>	<b>TOTAL</b>	<b>188,056</b>	<b>201,268</b>	<b>172,416</b>

Fresh Oranges Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
US	12,707	15,368	12,768	Japan	33,474	36,325	37,625
Egypt	1,643	1,233	1,166	Hong Kong	30,870	30,763	33,587
Spain	42	147	72	China	61,333	46,255	31,684
Iran	-	< 0.5	2	Singapore	7,895	11,362	8,421
Turkey	-	-	1	Malaysia	8,691	12,165	7,705
<i>Other</i>	<b>131</b>	<b>85</b>	<b>&lt; 0.5</b>	<i>Other</i>	<b>45,793</b>	<b>64,399</b>	<b>53,394</b>
<b>TOTAL</b>	<b>14,523</b>	<b>16,834</b>	<b>14,009</b>	<b>TOTAL</b>	<b>188,056</b>	<b>201,268</b>	<b>172,416</b>

Source: GTA

## Citrus—Oranges



### Processed Oranges International Trade

For the year ending June 2021, an additional **19,914 kilolitres** of frozen orange juice was imported. Australia also imported **833 kilolitres** of fresh orange juice, while exporting **3,631 kilolitres** of fresh orange juice.



Source: GTA





# Custard Apples

## Fresh Custard Apples

### Overview

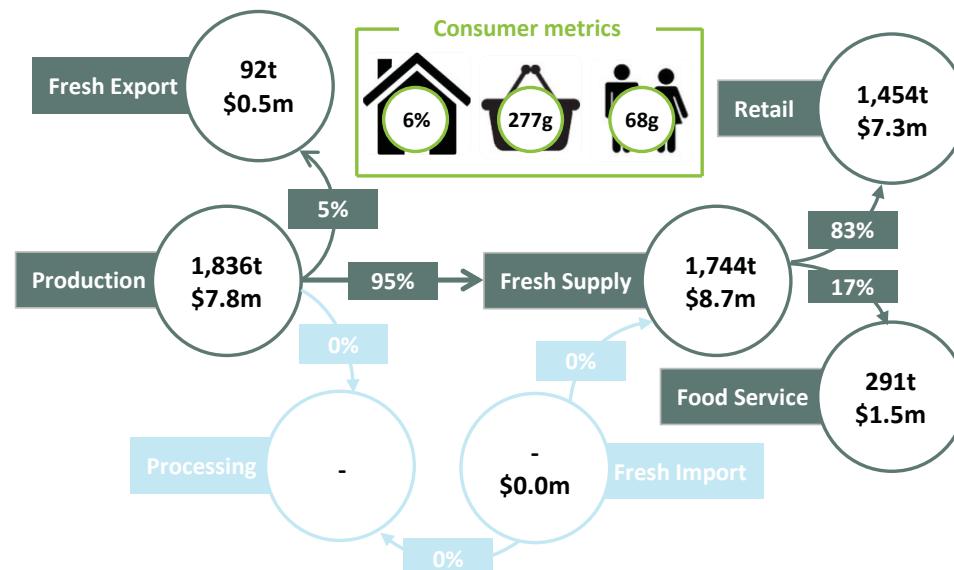
Custard apple production occurs in Queensland and northern New South Wales. The volume of custard apples that Australia imports and exports is negligible. The type of custard apple grown in Australia is unique in the world, known botanically as an atemoya.

For the year ending June 2021:

- **1,836 t** produced and valued at **\$7.8 m**.
- The wholesale value of the fresh supply was **\$8.7 m**, with **\$7.3 m** distributed into retail and **\$1.5 m** into food service.
- **6%** of Australian households purchased fresh custard apples, buying an average of **277 g** per shopping trip.
- The supply per capita was **68 g**, based on the volume supplied.



### Fresh Custard Apples Supply Chain—Year Ending June 2021



Sources: AC; Custard Apples Australia (CAA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Custard Apples



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,836	1,422	-23%	1,836	+29%
Production (\$m)	\$ 6.9	\$ 5.9	-15%	\$ 7.8	+33%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	92	71	-23%	92	+29%
Fresh Export Value (\$m)	\$ 0.4	\$ 0.4	-15%	\$ 0.5	+33%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,744	1,351	-23%	1,744	+29%
Fresh Supply Wholesale Value (\$m)	\$ 7.7	\$ 6.5	-15%	\$ 8.7	+33%
Supply per Capita (kg)	0.07	0.05	-24%	0.07	+29%
Retail Supply (t)	1,454	1,175	-19%	1,454	+24%
Retail Supply Wholesale Value (\$m)	\$ 6.4	\$ 5.7	-11%	\$ 7.3	+28%
Food Service Supply (t)	291	176	-39%	291	+65%
Food Service Wholesale Value (\$m)	\$ 1.3	\$ 0.9	-33%	\$ 1.5	+70%

Sources: AC; CAA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Custard Apple Production Areas

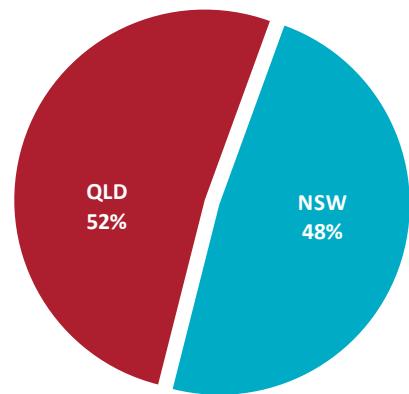


Source: CAA



## Custard Apples

2020/21 Fresh Custard Apple Production by State



Source: CAA

### Fresh Custard Apples Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	888												
Queensland	948												
Availability legend		High	Medium	Low									

Source: CAA

## Custard Apples



2020/21 Australian Horticulture Statistics Handbook

10/02/2022

2020/21 Australian Horticulture Statistics Handbook

freshlogic Hort Innovation



# Kiwifruit

## Fresh Kiwifruit Overview

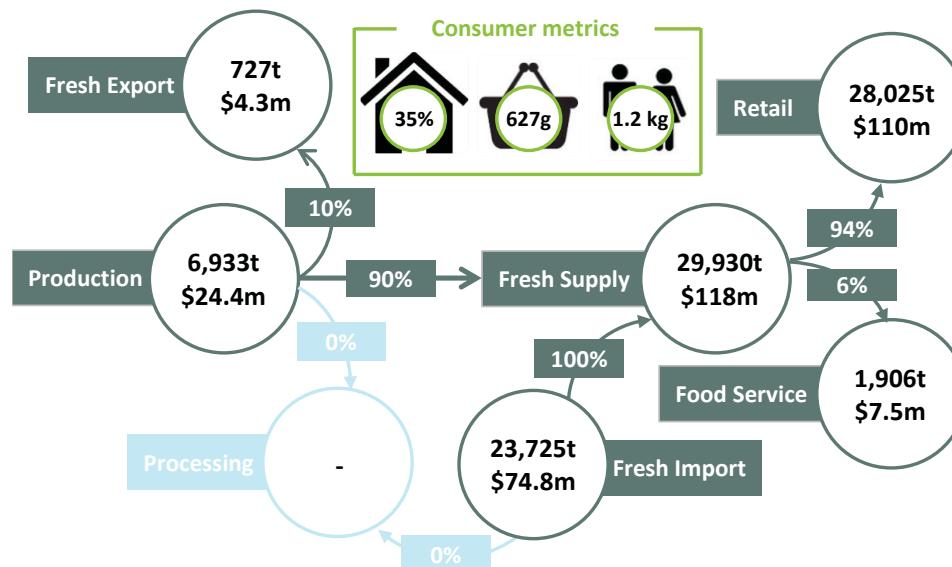
Kiwifruit production occurs predominantly in the southern states of Australia, with a larger volume being sourced from imports. The Australian season occurs between March and July. Year-round availability is made possible through imports, predominantly from New Zealand and Europe.

For the year ending June 2021:

- **6,933 t** produced and valued at **\$24.4 m**.
- The wholesale value of the fresh supply was **\$118 m**, with **\$110 m** distributed into retail and **\$7.5 m** into food service.
- **35%** of Australian households purchased fresh kiwifruit, buying an average of **627 g** of kiwifruit per shopping trip.
- The supply per capita was **1.2 kg**, based on the volume supplied.



## Fresh Kiwifruit Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Kiwifruit



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,133	7,375	+3%	6,933	-6%
Production (\$m)	\$ 19.0	\$ 24.1	+27%	\$ 24.4	+1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	660	605	-8%	727	+20%
Fresh Export Value (\$m)	\$ 2.1	\$ 3.0	+46%	\$ 4.3	+42%
Fresh Import Volume (t)	23,262	22,883	-2%	23,725	+4%
Fresh Import Value (\$m)	\$ 60.3	\$ 69.5	+15%	\$ 74.8	+8%
Fresh Supply (t)	29,735	29,653	>-1%	29,930	<1%
Fresh Supply Wholesale Value (\$m)	\$ 93.0	\$ 111.0	+19%	\$ 117.6	+6%
Supply per Capita (kg)	1.18	1.15	-3%	1.16	+1%
Retail Supply (t)	27,532	27,918	+1%	28,025	<1%
Retail Supply Wholesale Value (\$m)	\$ 86.1	\$ 104.5	+21%	\$ 110.1	+5%
Food Service Supply (t)	2,203	1,734	-21%	1,906	+10%
Food Service Wholesale Value (\$m)	\$ 6.9	\$ 6.5	-6%	\$ 7.5	+15%

Sources: ABS; AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

\*Note: Figures have been modified from those published in the previous edition of the handbook (2019/20 edition).

## Major Kiwifruit Production Areas

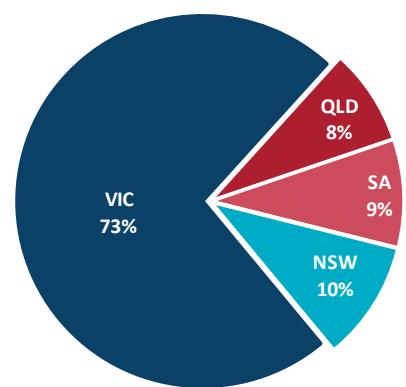


Source: (Freshlogic Analysis)



## Kiwifruit

2020/21 Fresh Kiwifruit Production by State



Source: (Freshlogic Analysis)

Fresh Kiwifruit Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	700												
Victoria	5,042												
Queensland	560												
South Australia	630												
Imported	23,725												
Availability legend		High	Medium	Low									

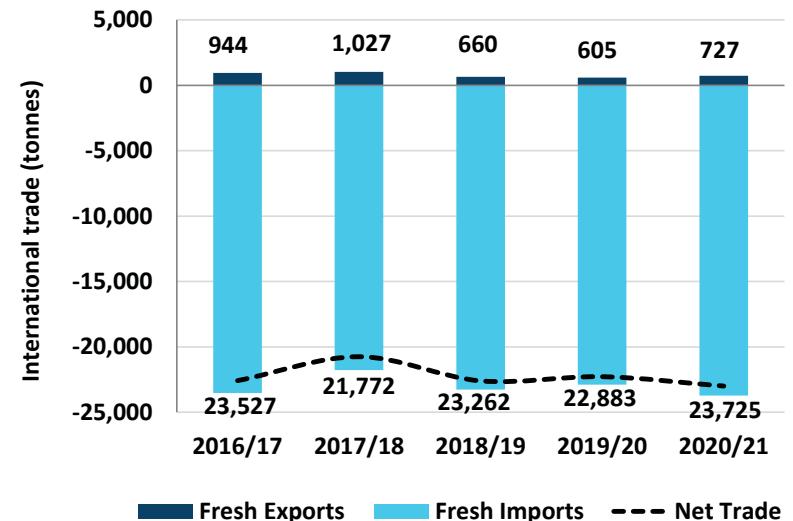
Source: (Freshlogic Analysis)

## Fresh Kiwifruit International Trade

Australia is a net importer of fresh kiwifruit, typically importing between **20,000-24,000 tonnes** per year. For the year ending June 2021, Australia imported **23,725 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Kiwifruit

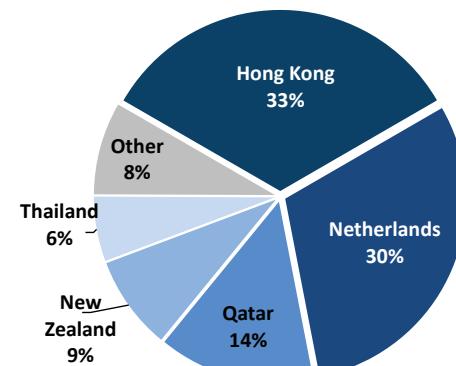
Net Fresh Kiwifruit International Trade



Source: GTA

For the year ending June 2021, **33%** of exported fresh kiwifruit was sent to Hong Kong, as profiled in the chart below.

2020/21 Fresh Kiwifruit Exports by Country



Source: GTA



## Kiwifruit

### Fresh Kiwifruit Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	10,970	10,883	10,612	Victoria	451	321	287
Victoria	8,059	7,283	8,032	New South Wales	24	16	71
Queensland	2,296	2,423	2,621	Queensland	48	79	58
Western Australia	1,668	1,851	2,191	Northern Territory	-	-	< 0.5
South Australia	269	442	269	Western Australia	22	9	< 0.5
<b>TOTAL</b>	<b>23,262</b>	<b>22,883</b>	<b>23,725</b>	<i>Other</i>	<b>115</b>	<b>179</b>	<b>312</b>
				<b>TOTAL</b>	<b>660</b>	<b>605</b>	<b>727</b>

### Fresh Kiwifruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New Zealand	17,070	16,765	18,275	Hong Kong	51	173	242
Italy	6,169	6,003	5,393	Netherlands	-	-	220
US	-	94	35	Qatar	36	34	102
France	23	21	-	New Zealand	22	-	61
<i>Other</i>	-	-	<b>23</b>	Thailand	-	-	42
<b>TOTAL</b>	<b>23,262</b>	<b>22,883</b>	<b>23,725</b>	<i>Other</i>	<b>551</b>	<b>397</b>	<b>60</b>
				<b>TOTAL</b>	<b>660</b>	<b>605</b>	<b>727</b>

Source: GTA

## Kiwifruit





# Lychees

## Fresh Lychees Overview

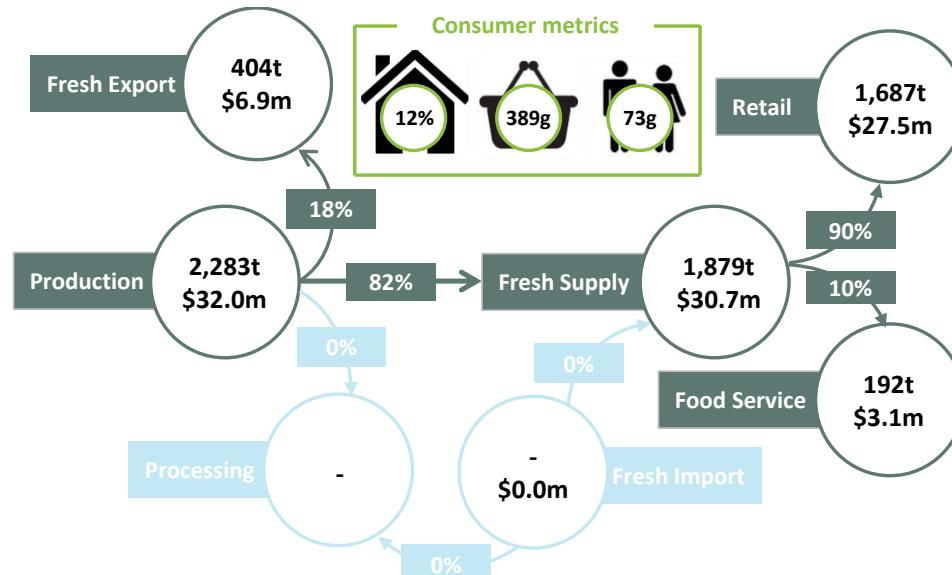
Lychee production occurs predominantly in Queensland, during the summer months.

For the year ending June 2021:

- **2,283 t** produced and valued at **\$32.0 m**.
- The wholesale value of the fresh supply was **\$30.7 m**, with **\$27.5 m** distributed into retail and **\$3.1 m** into food service.
- **12%** of Australian households purchased fresh lychees, buying an average of **389 g** per shopping trip.
- The supply per capita was **73 g**, based on the volume supplied.



## Fresh Lychees Supply Chain—Year Ending June 2021



Sources: AC; Australian Lychee Growers Association (ALGA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Lychees



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,733	2,434	-11%	2,283	-6%
Production (\$m)	\$ 34.4	\$ 31.9	-7%	\$ 32.0	<1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	484	431	-11%	404	-6%
Fresh Export Value (\$m)	\$ 7.4	\$ 6.9	-7%	\$ 6.9	<1%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	2,249	2,003	-11%	1,879	-6%
Fresh Supply Wholesale Value (\$m)	\$ 33.0	\$ 30.6	-7%	\$ 30.7	<1%
Supply per Capita (kg)	0.09	0.08	-13%	0.07	-6%
Retail Supply (t)	2,019	1,798	-11%	1,687	-6%
Retail Supply Wholesale Value (\$m)	\$ 29.6	\$ 27.5	-7%	\$ 27.5	<1%
Food Service Supply (t)	230	205	-11%	192	-6%
Food Service Wholesale Value (\$m)	\$ 3.4	\$ 3.1	-7%	\$ 3.1	<1%

Sources: AC; ALGA; CFVWA; MP & DD (Freshlogic Analysis)

## Major Lychee Production Areas

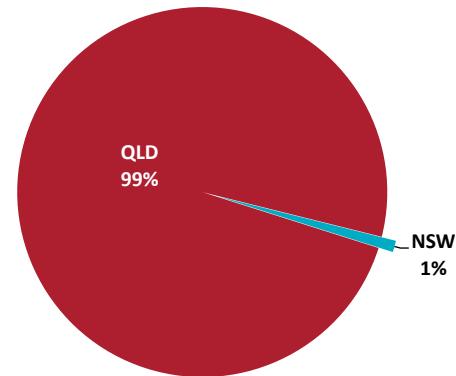


Source: ALGA



## Lychees

2020/21 Fresh Lychees Production by State



Source: ALGA

Fresh Lychee Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	23												
Queensland	2,260												
Availability legend		High	Medium	Low									None

Source: ALGA

## Lychees





# Mangoes

## Fresh Mangoes Overview

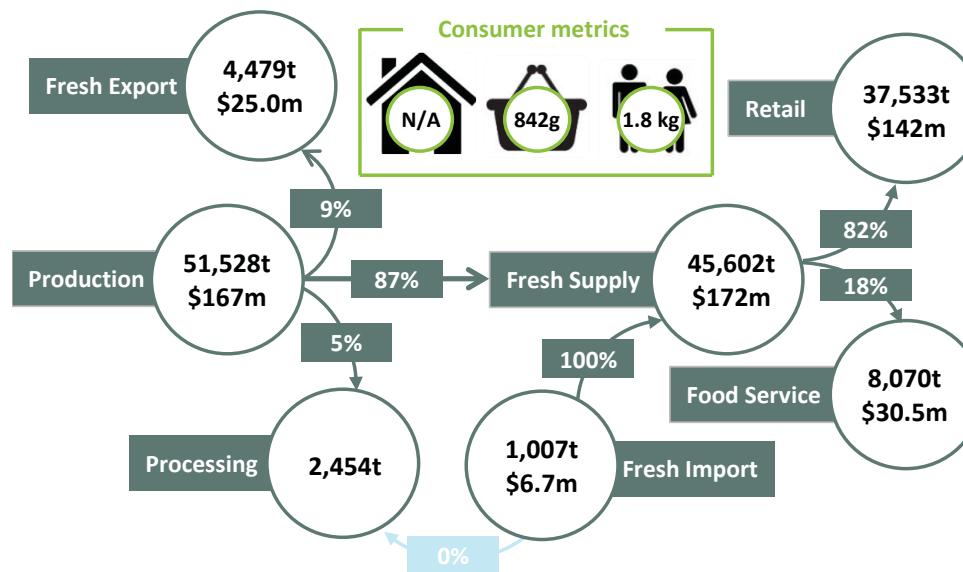
As a tropical fruit, mango production predominantly occurs in the North of Australia, particularly in Queensland and the Northern Territory.

For the year ending June 2021:

- **51,528 t** was produced valued at **\$167.4 m** while
- The wholesale value of the fresh supply was **\$172 m**, with **\$142 m** distributed into retail and **\$30.5 m** into food service.
- The supply per capita was **1.8 kg**, based on the volume supplied.



## Fresh Mangoes Supply Chain—Year Ending June 2021



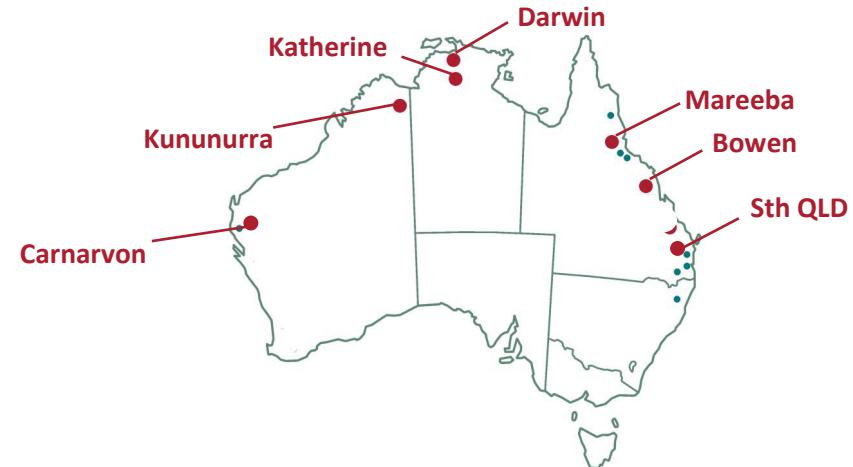
Sources: AC; Australian Mango Industry Association (AMIA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Mangoes

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	74,920	72,022	-4%	51,528	-28%
Production (\$m)	\$ 198.6	\$ 185.2	-7%	\$ 167.4	-10%
Producing Trees (000 Trees)	1,376	1,441	+5%	-	-
Fresh Export Volume (t)	8,221	7,707	-6%	4,479	-42%
Fresh Export Value (\$m)	\$ 30.7	\$ 33.7	+10%	\$ 25.0	-26%
Fresh Import Volume (t)	826	838	+2%	1,007	+20%
Fresh Import Value (\$m)	\$ 4.2	\$ 4.9	+17%	\$ 6.7	+38%
Fresh Supply (t)	63,957	61,724	-3%	45,602	-26%
Fresh Supply Wholesale Value (\$m)	\$ 201.5	\$ 183.0	-9%	\$ 172.4	-6%
Supply per Capita (kg)	2.54	2.39	-6%	1.77	-26%
Retail Supply (t)	52,173	51,436	-1%	37,533	-27%
Retail Supply Wholesale Value (\$m)	\$ 164.4	\$ 152.5	-7%	\$ 141.9	-7%
Food Service Supply (t)	11,785	10,287	-13%	8,070	-22%
Food Service Wholesale Value (\$m)	\$ 37.1	\$ 30.5	-18%	\$ 30.5	<1%

Sources: ABS; AC; AMIA; CFVWA; MP & DD (Freshlogic Analysis)

## Major Mango Production Areas



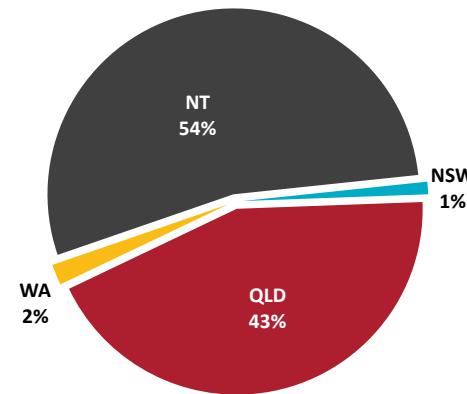
Source: AMIA





## Mangoes

### 2020/21 Fresh Mangoes Production by State



Source: AMIA

### Fresh Mangoes Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	559												
Queensland	22,415												
Western Australia	927												
Northern Territory	27,627												
Availability legend													
		High	Medium	Low									

Source: AMIA

### Main Mango Varieties

There are a number of varieties grown in Australia, however production for the fresh market is dominated by 4 main varieties. These include:

**Kensington Pride**, also known as KP, is the most common mango variety in Australia, and accounted for 43% of fresh production.

**Calypso**, a mango with yellowy orange skin and a deep pink blush, accounted for 25% of fresh production.

**R2E2** mangoes accounted for 19% of fresh production.

**Honey Gold** mangoes accounted for 8% of fresh production.

Other mangoes, such as Keitt, Tommy Atkins, Palmer and Nam Dok Mai, accounted for 4% of fresh production.

## Mangoes

### Seasonality by Mango Variety

The seasonal availability of some major varieties is profiled in the table below.

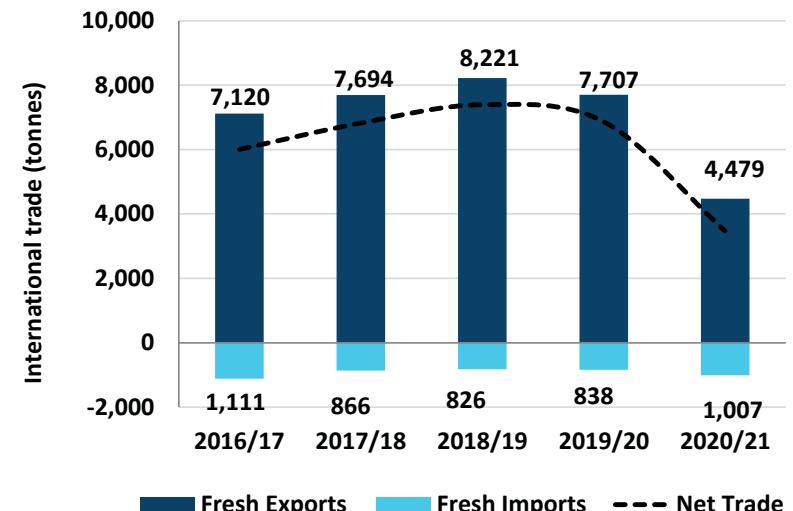
Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Kensington Pride	21,126												
Calypso	12,367												
R2E2	9,275												
Honey gold	4,122												
<i>Other</i>	<b>2,184</b>												
<b>Processing</b>	<b>2,454</b>												
Availability legend													
		High	Medium	Low									

Source: AMIA

### Fresh Mangoes International Trade

Australia is a net exporter of fresh mangoes, with exports growing in recent years. For the year ending June 2021, Australia exported **4,479 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

#### Net Fresh Mangoes International Trade



Source: GTA

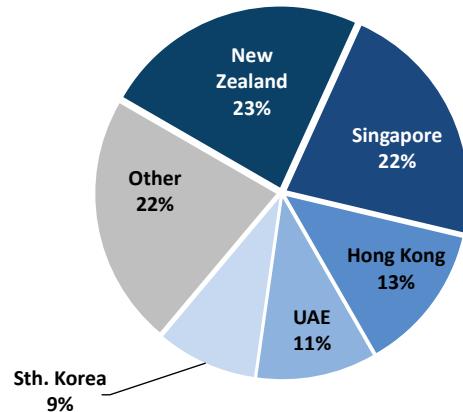




## Mangoes

For the year ending June 2021, **23%** of exported fresh mangoes were sent to New Zealand, as profiled in the chart below.

2020/21 Fresh Mangoes Exports by Country



Source: GTA

Fresh Mangoes Imports and Exports by State

Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)				
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	397	428	470	Queensland	5,755	5,111	3,384
Victoria	268	213	268	New South Wales	802	1,177	516
Western Australia	115	168	222	Northern Territory	1,303	1,089	411
Queensland	40	27	40	Victoria	301	265	162
South Australia	5	< 0.5	4	Western Australia	36	49	5
Other	1	2	3	Other	24	15	2
<b>TOTAL</b>	<b>826</b>	<b>838</b>	<b>1,007</b>	<b>TOTAL</b>	<b>8,221</b>	<b>7,707</b>	<b>4,479</b>

Fresh Mangoes Imports and Exports by Country

Imports by country (Tonnes)			Exports by country (Tonnes)				
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Thailand	294	249	268	New Zealand	1,179	1,304	1,050
Vietnam	61	146	201	Singapore	1,869	1,544	982
Mexico	171	102	116	Hong Kong	1,973	1,589	582
Pakistan	48	61	108	UAE	910	1,037	473
India	178	94	108	Sth. Korea	143	208	397
Other	74	187	205	Other	2,146	2,025	995
<b>TOTAL</b>	<b>826</b>	<b>838</b>	<b>1,007</b>	<b>TOTAL</b>	<b>8,221</b>	<b>7,707</b>	<b>4,479</b>





## Melons—Overview

### Fresh Melons Overview

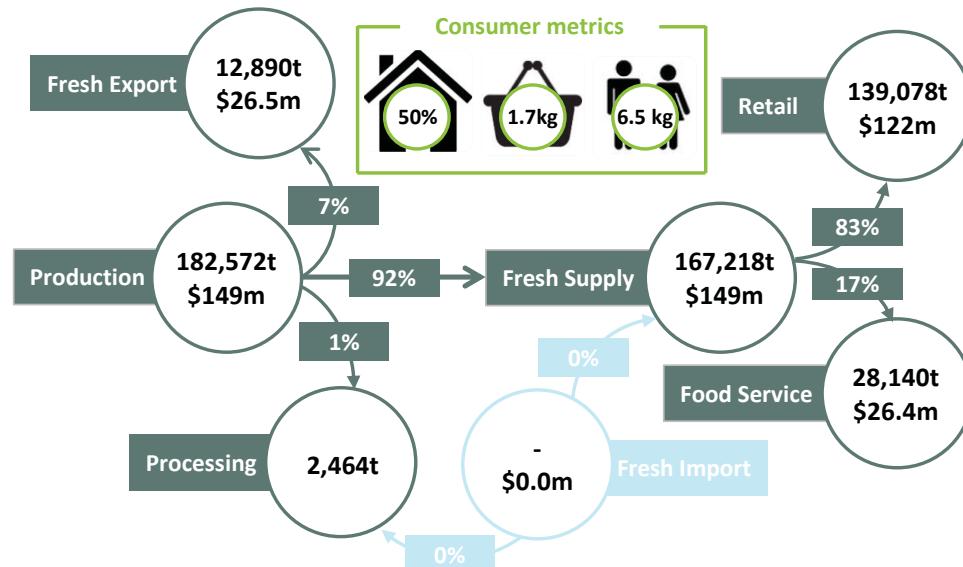
Pages 146-147 profile total melon fruit production and trade. It combines information on watermelons and muskmelons. The following pages profile each melon category in more detail.

For the year ending June 2021:

- 182,572 t produced and valued at \$149 m.
- The wholesale value of the fresh supply was \$148.6 m, with \$122.2 m distributed into retail and \$26.4 m into food service.
- 50% of Australian households purchased fresh melons, buying an average of 1.7 kg per shopping trip.
- The supply per capita was 6.5 kg, based on the volume supplied.



### Fresh Melons Supply Chain—Year Ending June 2021



Sources: AC; Melons Australia (MA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Melons—Overview

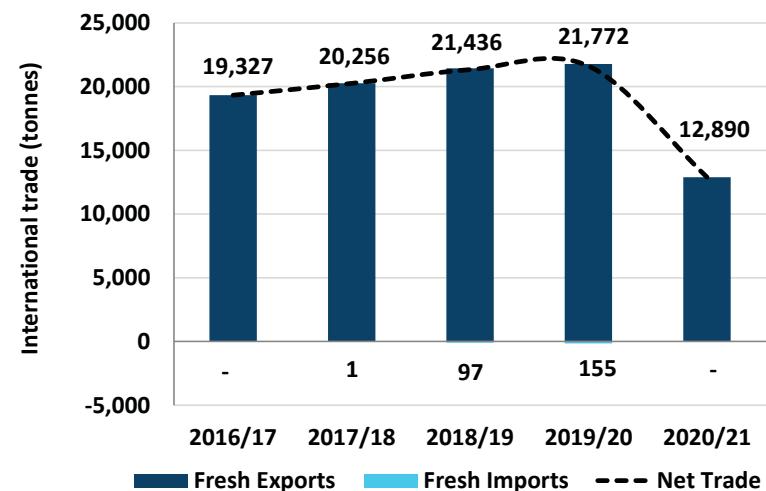


Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	218,324	190,024	-13%	182,572	-4%
Production (\$m)	\$ 144.6	\$ 152.1	+5%	\$ 149.0	-2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	21,436	21,772	+2%	12,890	-41%
Fresh Export Value (\$m)	\$ 37.0	\$ 39.3	+6%	\$ 26.5	-33%
Fresh Import Volume (t)	97	155	+59%	-	-100%
Fresh Import Value (\$m)	\$ 0.2	\$ 0.2	+11%	\$ -	-100%
Fresh Supply (t)	194,336	165,961	-15%	167,218	<1%
Fresh Supply Wholesale Value (\$m)	\$ 133.0	\$ 139.5	+5%	\$ 148.6	+6%
Supply per Capita (kg)	7.71	6.43	-17%	6.49	<1%
Retail Supply (t)	160,666	148,583	-8%	139,078	-6%
Retail Supply Wholesale Value (\$m)	\$ 108.6	\$ 123.9	+14%	\$ 122.2	-1%
Food Service Supply (t)	33,670	17,378	-48%	28,140	+62%
Food Service Wholesale Value (\$m)	\$ 24.5	\$ 15.6	-36%	\$ 26.4	+69%

Sources: AC; MA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Fresh Melons International Trade

#### Net Fresh Melons International Trade



Source: GTA



## Melons—Muskmelons



### Fresh Muskmelons Overview

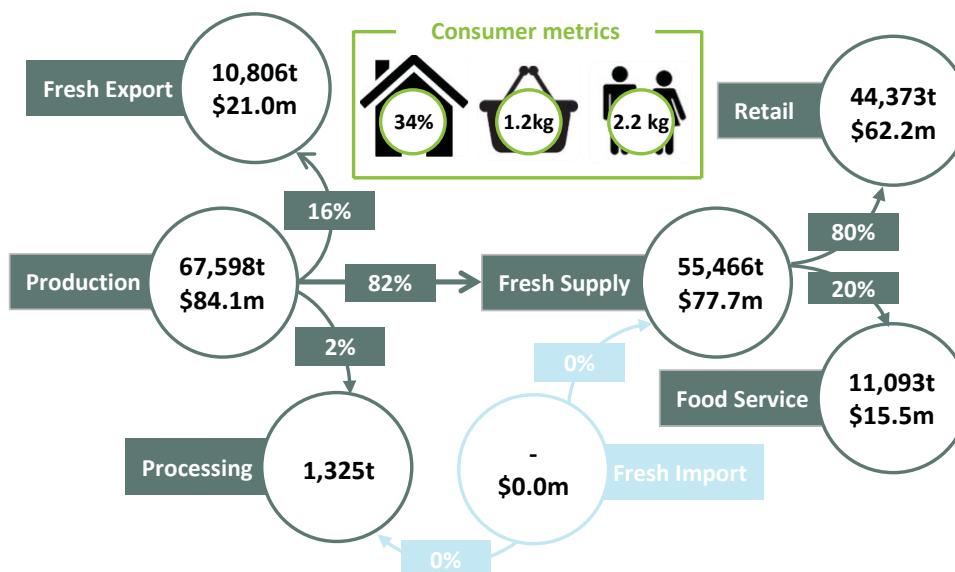
Muskmelons include **rockmelons** and **honey dew melons**. Production occurs across most states of Australia.

For the year ending June 2021:

- **67,598 t** produced and valued at **\$84.1 m**.
- The wholesale value of the fresh supply was **\$77.7 m**, with **\$62.2 m** distributed into retail and **\$15.5 m** into food service.
- **34%** of Australian households purchased fresh muskmelons, buying an average of **1.2 kg** per shopping trip.
- The supply per capita was **2.2 kg**, based on the volume supplied.



### Fresh Muskmelons Supply Chain—Year Ending June 2021



Sources: AC; Melons Australia (MA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Melons—Muskmelons

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	50,327	58,136	+16%	67,598	+16%
Production (\$m)	\$ 62.7	\$ 68.4	+9%	\$ 84.1	+23%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	14,125	14,887	+5%	10,806	-27%
Fresh Export Value (\$m)	\$ 24.3	\$ 26.2	+8%	\$ 21.0	-20%
Fresh Import Volume (t)	21	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	35,236	42,109	+20%	55,466	+32%
Fresh Supply Wholesale Value (\$m)	\$ 49.5	\$ 54.1	+9%	\$ 77.7	+44%
Supply per Capita (kg)	1.40	1.63	+17%	2.15	+32%
Retail Supply (t)	27,528	35,991	+31%	44,373	+23%
Retail Supply Wholesale Value (\$m)	\$ 38.6	\$ 46.3	+20%	\$ 62.2	+34%
Food Service Supply (t)	7,708	6,118	-21%	11,093	+81%
Food Service Wholesale Value (\$m)	\$ 10.8	\$ 7.9	-27%	\$ 15.5	+98%

Sources: AC; MA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Muskmelon Production Areas



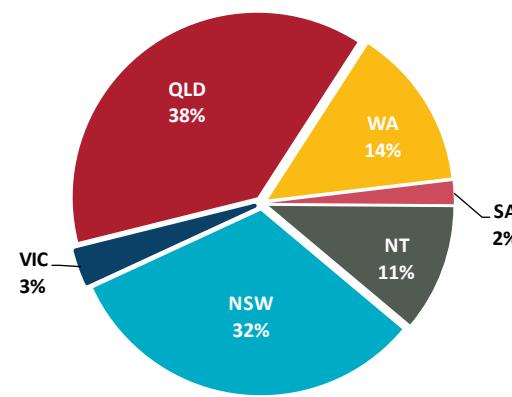
Source: MA



## Melons—Muskmelons



### 2020/21 Fresh Muskmelons Production by State



Sources: MA

### Fresh Muskmelons Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	21,631												
Victoria	2,028												
Queensland	25,687												
Western Australia	9,464												
South Australia	1,352												
Northern Territory	7,436												
Availability legend		High	Medium	Low									

Source: MA

### Main Muskmelon Varieties

Production is dominated by two main varieties, as indicated below:

**Rockmelons**, a round melon with netted greyish-green skin and an orange flesh.

Rockmelons accounted for 85% of fresh production for the year ending June 2021.

**Honeydew melons**, a round melon with a light green flesh. Honeydew melons accounted for 14% of fresh production.

Other muskmelon varieties include the newly introduced **Piel de Sapo** variety, accounted for 1% of fresh production.

## Melons—Muskmelons

### Seasonality by Muskmelon Variety

The seasonal availability of some major varieties is profiled in the table below.

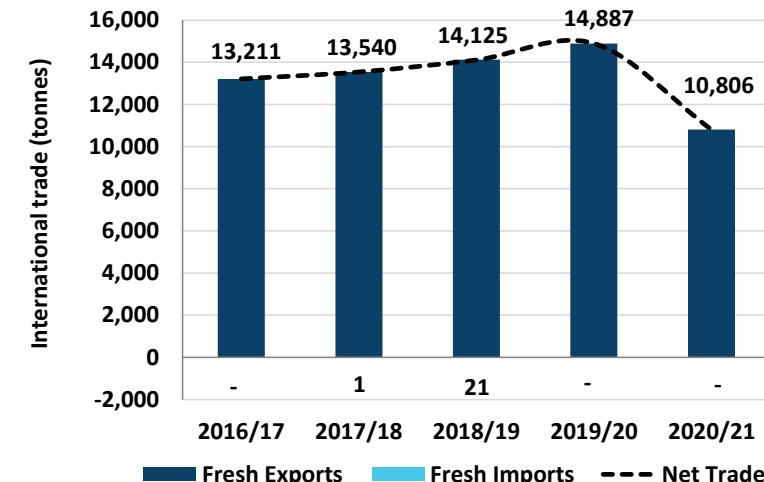
Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	57,458												
Honeydew	9,464												
Piel de Sapo	676												
Availability legend		High	Medium	Low									

Source: MA

### Fresh Muskmelons International Trade

Australia is a net exporter of fresh muskmelons, typically exporting between **10,500-15,000 tonnes** per year. For the year ending June 2021, Australia exported **10,806 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Muskmelons International Trade



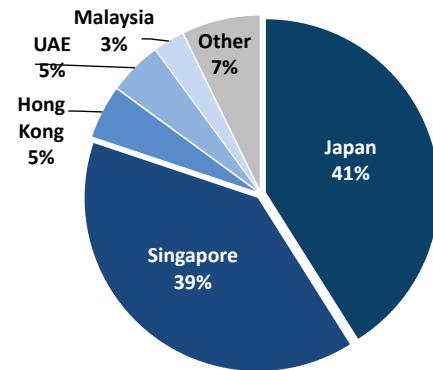
Source: GTA



## Melons—Muskmelons

For the year ending June 2021, **41%** of exported fresh muskmelons were sent to Japan, as profiled in the chart below.

2020/21 Fresh Muskmelons Exports by State



Source: GTA

Fresh Muskmelons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Queensland	21	-	-	Queensland	7,392	7,945	5,788
<b>TOTAL</b>	<b>21</b>	-	-	Western Australia	3,352	3,845	2,565

Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Queensland	21	-	-	Queensland	7,392	7,945	5,788
Western Australia				Western Australia	3,352	3,845	2,565
New South Wales				New South Wales	2,970	2,628	1,794
South Australia				South Australia	49	13	404
Victoria				Victoria	362	443	237
<i>Other</i>				<i>Other</i>	-	12	18
<b>TOTAL</b>	<b>21</b>	-	-	<b>TOTAL</b>	<b>14,125</b>	<b>14,887</b>	<b>10,806</b>

## Melons—Muskmelons



Fresh Muskmelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New Zealand	2	-	-	Japan	958	3,082	4,436
<i>Other</i>	<b>19</b>	-	-	Singapore	5,665	5,546	4,224
<b>TOTAL</b>	<b>21</b>	-	-	Hong Kong	1,256	1,266	531
				UAE	2,293	1,481	529
				Malaysia	245	504	306
				<i>Other</i>	<b>3,708</b>	<b>3,008</b>	<b>781</b>
				<b>TOTAL</b>	<b>14,125</b>	<b>14,887</b>	<b>10,806</b>

Source: GTA



# Melons—Watermelons



## Fresh Watermelons Overview

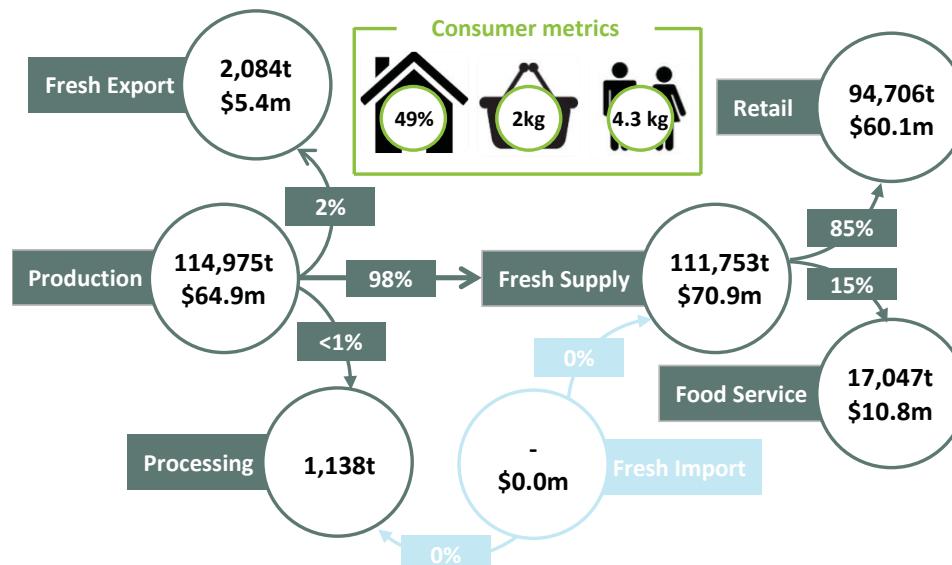
Watermelon production occurs across Australia, but predominantly in the northern states. The majority of production is destined for the fresh market, with limited volumes of export.

For the year ending June 2021:

- 114,975 t produced and valued at \$64.9 m.
- The wholesale value of the fresh supply was \$70.9 m, with \$60.1 m distributed into retail and \$10.8 m into food service.
- 49% of Australian households purchased fresh watermelons, buying an average of 2 kg per shopping trip.
- The supply per capita was 4.3 kg, based on the volume supplied.



## Fresh Watermelons Supply Chain—Year Ending June 2021



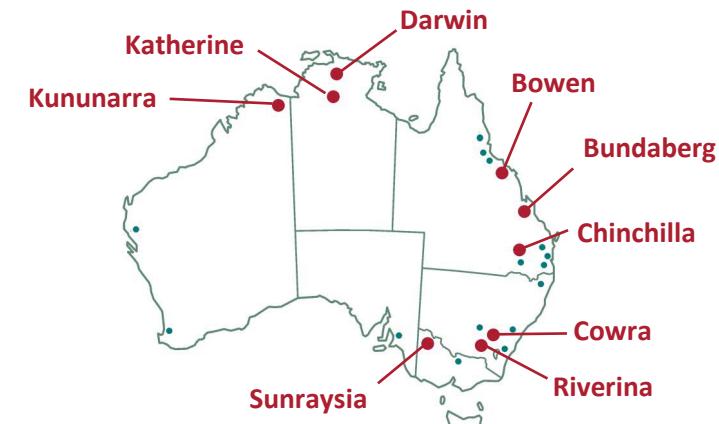
Sources: AC; Melons Australia (MA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Melons—Watermelons

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	167,997	\$131,889	-21%	114,975	-13%
Production (\$m)	\$ 81.9	\$ 83.7	+2%	\$ 64.9	-22%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	7,311	6,885	-6%	2,084	-70%
Fresh Export Value (\$m)	\$ 12.7	\$ 13.1	+3%	\$ 5.4	-59%
Fresh Import Volume (t)	77	155	>100%	-	-100%
Fresh Import Value (\$m)	\$ 0.1	\$ 0.2	+65%	\$ -	-100%
Fresh Supply (t)	159,100	123,852	-22%	111,753	-10%
Fresh Supply Wholesale Value (\$m)	\$ 83.5	\$ 85.4	+2%	\$ 70.9	-17%
Supply per Capita (kg)	6.31	4.80	-24%	4.34	-10%
Retail Supply (t)	133,138	112,593	-15%	94,706	-16%
Retail Supply Wholesale Value (\$m)	\$ 69.9	\$ 77.6	+11%	\$ 60.1	-23%
Food Service Supply (t)	25,962	11,259	-57%	17,047	+51%
Food Service Wholesale Value (\$m)	\$ 13.6	\$ 7.8	-43%	\$ 10.8	+39%

Sources: AC; MA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Major Watermelon Production Areas



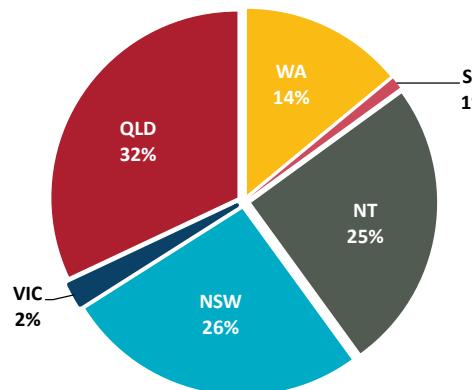
Source: MA



## Melons—Watermelons



### 2020/21 Fresh Watermelons Production by State



Source: MA

### Fresh Watermelons Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	29,893												
Victoria	2,299												
Queensland	36,792												
Western Australia	16,096												
South Australia	1,150												
Northern Territory	28,744												
Availability legend													
		High	Medium	Low									

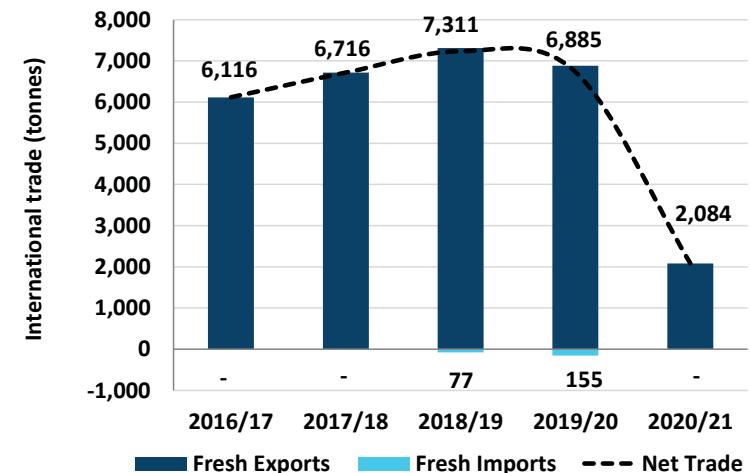
Source: MA

### Fresh Watermelons International Trade

Australia is a net exporter of fresh watermelons. For the year ending June 2021, Australia exported **2,084** tonnes. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Melons—Watermelons

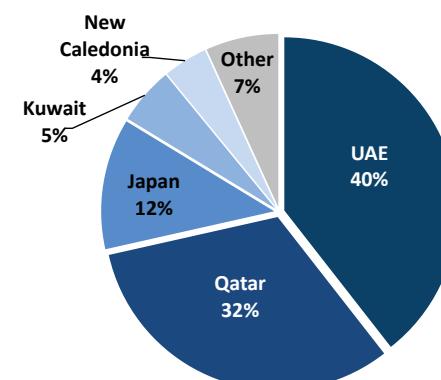
### Net Fresh Watermelons International Trade



Source: GTA

For the year ending June 2020, **40%** of exported fresh watermelons were sent to United Arab Emirates, as profiled in the chart below.

### 2020/21 Fresh Watermelons Exports by Country



Source: GTA



## Melons—Watermelons



### Fresh Watermelons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	-	114	-	Queensland	5,160	4,571	993
Queensland	77	22	-	New South Wales	945	843	521
Victoria	-	19	-	Western Australia	438	799	280
<b>TOTAL</b>	<b>77</b>	<b>155</b>	<b>-</b>	Victoria	346	299	156
				Northern Territory	423	279	102
				<i>Other</i>	<0.5	94	31
				<b>TOTAL</b>	<b>7,311</b>	<b>6,885</b>	<b>2,084</b>

### Fresh Watermelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
<i>Other</i>	<b>77</b>	<b>155</b>	<b>-</b>	UAE	4,196	3,226	822
<b>TOTAL</b>	<b>77</b>	<b>155</b>	<b>-</b>	Qatar	465	742	667

New Caledonia      37      5      86

Year Ending June	2019	2020	2021
<i>Other</i>	<b>2,420</b>	<b>2,613</b>	<b>142</b>
<b>TOTAL</b>	<b>7,311</b>	<b>6,885</b>	<b>2,084</b>

Source: GTA

## Melons—Watermelons





## Fresh Nashi Overview

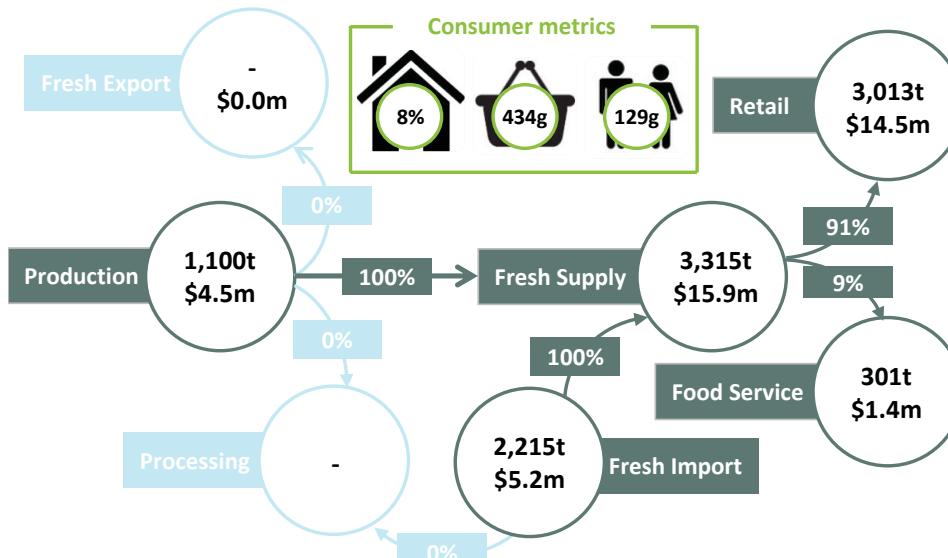
Nashi fruit, and other Asian pears as they are sometimes known, are grown predominantly in the Goulburn Valley region of Victoria. Nashi fruit grown in Australia are all grown for the fresh market.

For the year ending June 2021:

- **1,100 t** was produced and valued at **\$4.5 m**.
- The wholesale value of the fresh supply was **\$15.9 m** with **\$14.5 m** distributed into retail and **\$1.4 m** into food service.
- **8%** of Australian households purchased fresh nashi, buying an average of **434 g** per shopping trip.
- The supply per capita was **129 g**, based on the volume supplied.



### Fresh Nashi Supply Chain—Year Ending June 2021



Sources: AC; Australian Nashi Grower's Association (ANGA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,384	877	-37%	1,100	+25%
Production (\$m)	\$ 4.2	\$ 3.1	-26%	\$ 4.5	+43%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	1,345	2,843	>100%	2,215	-22%
Fresh Import Value (\$m)	\$ 2.8	\$ 5.2	+83%	\$ 5.2	<1%
Fresh Supply (t)	2,729	3,720	+36%	3,315	-11%
Fresh Supply Wholesale Value (\$m)	\$ 9.9	\$ 15.7	+59%	\$ 15.9	+2%
Supply per Capita (kg)	0.11	0.14	+33%	0.13	-11%
Retail Supply (t)	2,458	3,413	+39%	3,013	-12%
Retail Supply Wholesale Value (\$m)	\$ 8.9	\$ 14.4	+62%	\$ 14.5	<1%
Food Service Supply (t)	271	307	+13%	301	-2%
Food Service Wholesale Value (\$m)	\$ 1.0	\$ 1.3	+32%	\$ 1.4	+12%

Sources: AC; ANGA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Major Nashi Production Areas



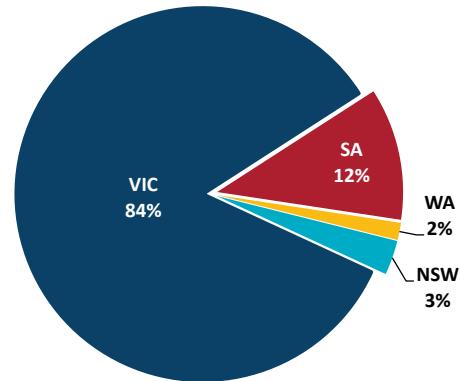
Source: ANGA



## Nashi



2020/21 Fresh Nashi Production by State



Source: ANGA

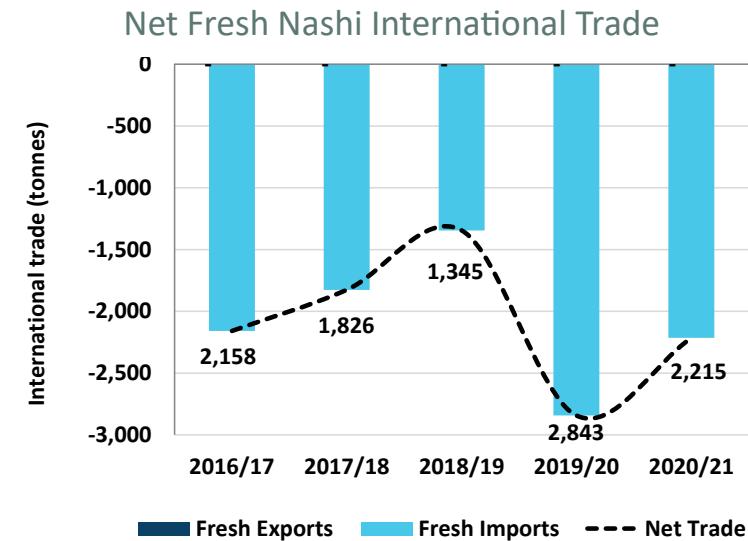
Fresh Nashi Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	33												
Victoria	924												
South Australia	127												
Western Australia	17												
Availability legend		High	Medium	Low									

Source: ANGA

## Fresh Nashi International Trade

Australia is a net importer of fresh nashi. For the year ending June 2021, Australia imported **2,215 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



## Fresh Nashi Imports by State

Imports by state destination (Tonnes)			
Year Ending June	2019	2020	2021
Victoria	512	1,156	1,099
New South Wales	688	1,426	868
Queensland	99	158	152
Western Australia	47	103	96
<b>TOTAL</b>	<b>1,345</b>	<b>2,843</b>	<b>2,215</b>

## Fresh Nashi Imports by Country

Imports by country (Tonnes)			
Year Ending June	2019	2020	2021
China	1,179	2,627	2,051
Sth. Korea	167	216	163
<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>-</b>
<b>TOTAL</b>	<b>1,345</b>	<b>2,843</b>	<b>2,215</b>

Source: GTA





# Passionfruit

## Fresh Passionfruit Overview

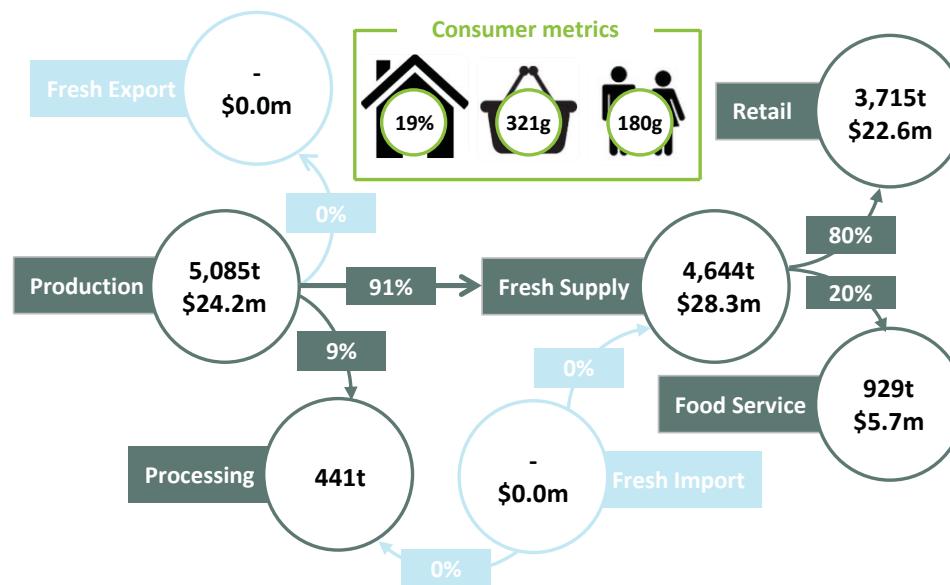
Passionfruit is grown in the north of Australia, with the majority grown in Queensland. The majority of Australian production is destined for the fresh market.

For the year ending June 2021:

- **5,085 t** produced and valued at **\$24.2 m**.
- The wholesale value of the fresh supply was **\$28.3 m**, with **\$22.6 m** distributed into retail and **\$5.7 m** into food service.
- **19%** of Australian households purchased fresh passionfruit, buying an average of **321 g** per shopping trip.
- The supply per capita was **180 g**, based on the volume supplied.



## Fresh Passionfruit Supply Chain—Year Ending June 2021



Sources: AC; CFVWA; GTA; Passionfruit Australia Inc. (PAI); MP & DD (Freshlogic Analysis)

# Passionfruit



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	4,469	4,783	+7%	5,085	+6%
Production (\$m)	\$ 19.4	\$ 23.6	+21%	\$ 24.2	+3%
Producing Vines (000 Vines)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	4,216	4,338	+3%	4,644	+7%
Fresh Supply Wholesale Value (\$m)	\$ 22.8	\$ 27.5	+21%	\$ 28.3	+3%
Supply per Capita (kg)	0.17	0.17	<1%	0.18	+7%
Retail Supply (t)	3,319	3,523	+6%	3,715	+5%
Retail Supply Wholesale Value (\$m)	\$ 17.9	\$ 22.4	+25%	\$ 22.6	+1%
Food Service Supply (t)	896	815	-9%	929	+14%
Food Service Wholesale Value (\$m)	\$ 4.8	\$ 5.2	+7%	\$ 5.7	+9%

Sources: AC; CFVWA; GTA; PAI; MP & DD (Freshlogic Analysis)

## Major Passionfruit Production Areas



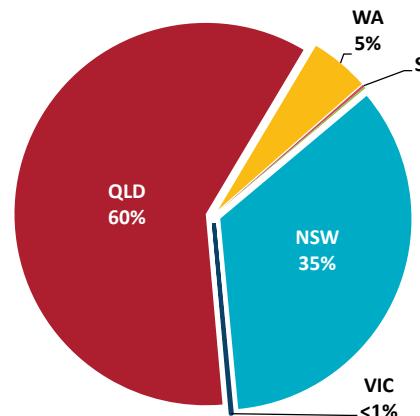
Source: PAI



## Passionfruit



2020/21 Fresh Passionfruit Production by State



Source: PAI

Fresh Passionfruit Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,762												
Victoria	5												
Queensland	3,053												
Western Australia	254												
SA/NT	11												
Availability legend		High	Medium	Low									

Source: PAI

## Passionfruit



Photo credit: James Stretch 2016



# Papaya/Pawpaw

## Fresh Papaya/Pawpaw Overview

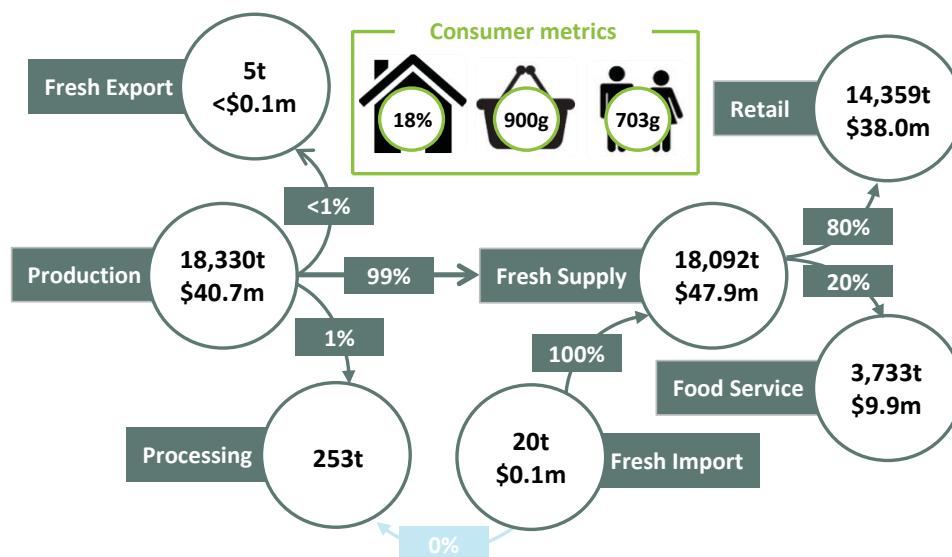
As a tropical fruit, red papaya and yellow pawpaw production predominantly occurs in the North of Australia, in Queensland, as well as some production in the Northern Territory and Western Australia.

For the year ending June 2021:

- **18,331 t** produced and valued at **\$40.7 m**.
- The wholesale value of the fresh supply was **\$47.9 m**, with **\$38.0 m** distributed in retail and **\$9.9 m** into food service.
- **18%** of Australian households purchased fresh red papaya and yellow pawpaw, buying an average of **900 g** per shopping trip.
- The supply per capita was **703 g**, based on the volume supplied.



### Fresh Papaya/Pawpaw Supply Chain—Year Ending June 2021



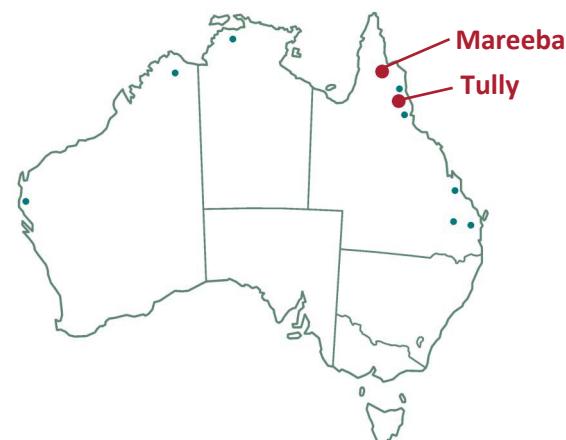
Sources: AC; CFVWA; GTA; Papaya Australia (PA); MP & DD (Freshlogic Analysis)

# Papaya/Pawpaw

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	14,921	19,648	+32%	18,331	-7%
Production (\$m)	\$ 27.5	\$ 31.8	+15%	\$ 40.7	+28%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	45	10	-78%	5	-45%
Fresh Export Value (\$m)	\$ 0.2	< \$0.1	-87%	< \$0.1	+83%
Fresh Import Volume (t)	40	86	>100%	20	-77%
Fresh Import Value (\$m)	\$ 0.2	\$ 0.4	>100%	\$ 0.1	-69%
Fresh Supply (t)	14,710	19,452	+32%	18,092	-7%
Fresh Supply Wholesale Value (\$m)	\$ 32.3	\$ 37.5	+16%	\$ 47.9	+28%
Supply per Capita (kg)	0.58	0.75	+29%	0.70	-7%
Retail Supply (t)	11,674	15,438	+32%	14,359	-7%
Retail Supply Wholesale Value (\$m)	\$ 25.6	\$ 29.7	+16%	\$ 38.0	+28%
Food Service Supply (t)	3,035	4,014	+32%	3,733	-7%
Food Service Wholesale Value (\$m)	\$ 6.7	\$ 7.7	+16%	\$ 9.9	+28%

CFVWA; GTA; PA; MP & DD (Freshlogic Analysis)

### Major Papaya/Pawpaw Production Areas



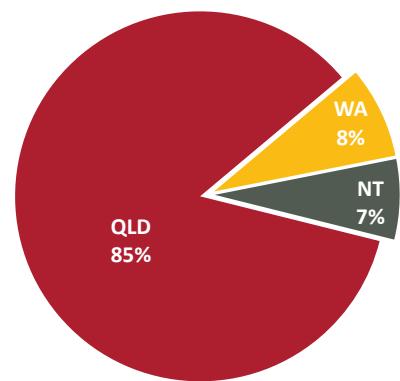
Source: PA





## Papaya/Pawpaw

2020/21 Fresh Papaya/Pawpaw Production by State



Source: PA

Fresh Papaya/Pawpaw Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	15,581												
Western Australia	1,466												
Northern Territory	1,283												
Imported	20												
Availability legend		High	Medium	Low									

Source: PA

## Main Categories

There are currently two main categories grown in Australia. These include:

**Red papaya** accounted for 85% of fresh production.

**Yellow pawpaw** accounted for 15% of fresh production.

## Seasonality by category

Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Papaya	15,581												
Pawpaw	2,750												
Availability legend		High	Medium	Low									

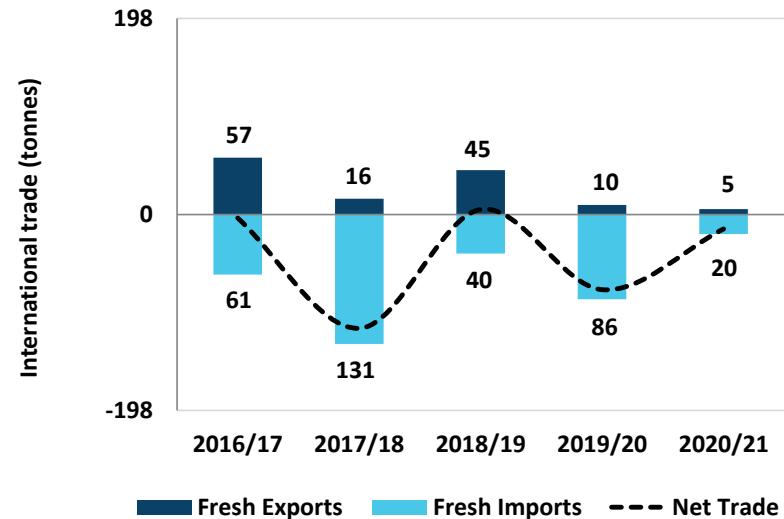
Source: PA

## Papaya/Pawpaw

### Fresh Papaya/Pawpaw International Trade

Australia is a net importer of fresh red papaya and yellow pawpaw, typically importing between 20-130 tonnes per year. For the year ending June 2021, Australia imported 20 tonnes. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Papaya/Pawpaw International Trade



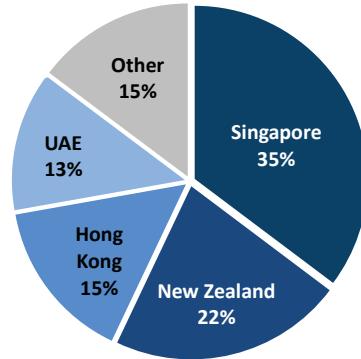
Source: GTA



## Papaya/Pawpaw

For the year ending June 2021, **35%** of exported fresh red papaya and yellow pawpaw were sent to Singapore, as profiled in the chart below.

2020/21 Fresh Papaya/Pawpaw Exports by Country



Source: GTA

Papaya/Pawpaw Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Victoria	40	85	19	Queensland	42	2	3
New South Wales	-	-	1	New South Wales	<0.5	3	2
Western Australia	-	<0.5	-	Victoria	-	4	<0.5
<b>Other</b>	-	<b>&lt;0.5</b>	-	Northern Territory	-	-	<0.5
<b>TOTAL</b>	<b>40</b>	<b>86</b>	<b>20</b>	<b>Other</b>	<b>3</b>	-	<b>&lt;0.5</b>
				<b>TOTAL</b>	<b>45</b>	<b>10</b>	<b>5</b>

## Papaya/Pawpaw



Papaya/Pawpaw Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Fiji	39	85	19	Singapore	<0.5	4	2
Vietnam	-	-	1	New Zealand	44	-	1
Sri Lanka	-	-	<0.5	Hong Kong	<0.5	<0.5	1
Philippines	-	<0.5	-	UAE	-	-	1
Thailand	1	-	-	Kuwait	-	-	<0.5
<b>Other</b>	-	<b>&lt;0.5</b>	<b>&lt;0.5</b>	<b>Other</b>	<b>1</b>	<b>6</b>	<b>1</b>
<b>TOTAL</b>	<b>40</b>	<b>86</b>	<b>20</b>	<b>TOTAL</b>	<b>45</b>	<b>10</b>	<b>5</b>

Source: GTA





## Fresh Pears Overview

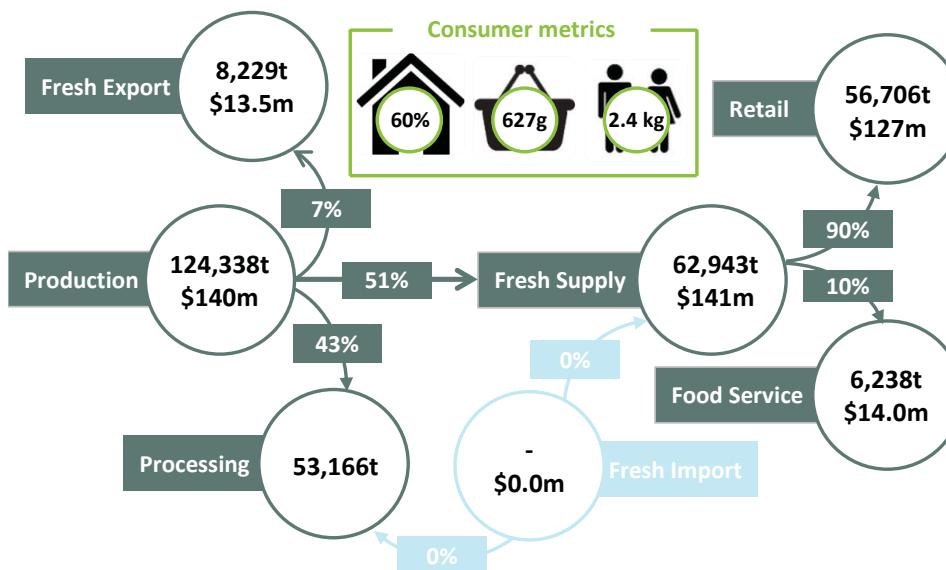
While pears are produced in all states of Australia, the vast majority of pears are grown in the Goulburn Valley region of Victoria. Harvesting typically occurs between February and April. Year-round availability is made possible through the use of controlled atmosphere technology.

For the year ending June 2021:

- **124,338 t** was produced valued at **\$140 m**, with **43%** sent to be processed.
- The wholesale value of fresh supply was **\$141 m**, with **\$127 m** distributed into retail and **\$14.0 m** distributed into food service.
- **60%** of Australian households purchased fresh pears, buying an average of **627 g** per shopping trip.
- The supply per capita was **2.4 kg**, based on the volume supplied.



## Fresh Pears Supply Chain—Year Ending June 2021



Sources: ABS; AC; Apples & Pears Australia Limited (APAL); CFVWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	114,498	118,689	+4%	124,338	+5%
Production (\$m)	\$ 115.4	\$ 130.2	+13%	\$ 140.4	+8%
Producing Trees (000 Trees)	1,354	1,354	-	1,354	-
Fresh Export Volume (t)	9,190	9,732	+6%	8,229	-15%
Fresh Export Value (\$m)	\$ 16.4	\$ 16.1	-1%	\$ 13.5	-16%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	66,137	62,424	-6%	62,943	<1%
Fresh Supply Wholesale Value (\$m)	\$ 121.1	\$ 128.5	+6%	\$ 141.1	+10%
Supply per Capita (kg)	2.62	2.42	-8%	2.44	+1%
Retail Supply (t)	59,718	57,008	-5%	56,706	>-1%
Retail Supply Wholesale Value (\$m)	\$ 109.4	\$ 117.4	+7%	\$ 127.1	+8%
Food Service Supply (t)	6,420	5,416	-16%	6,238	+15%
Food Service Wholesale Value (\$m)	\$ 11.8	\$ 11.2	-5%	\$ 14.0	+25%

Sources: ABS; AC; APAL; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Major Pears Production Areas



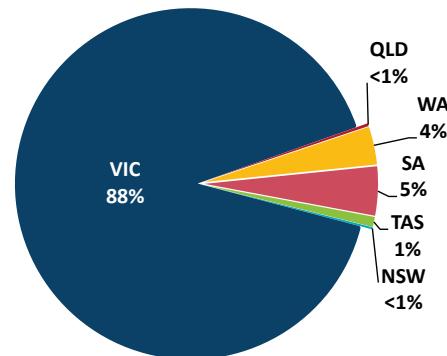
Source: APAL



## Pears



### 2020/21 Fresh Pears Production by State



Source: APAL

### Fresh Pears Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	248												
Victoria	112,507												
Queensland	339												
Western Australia	4,396												
South Australia	5,677												
Tasmania	1,171												
Availability legend		High	Medium	Low									

Source: APAL

### Main Pear varieties

There are a number of varieties grown in Australia, production for the fresh market is dominated by 3 main varieties. These include:

**Packham**, a green pear that is the most popular variety in Australia. Packham pears accounted for **63%** of fresh production.

**Williams**, a green pear that turns yellow as it ripens. Williams pears accounted for **20%** of fresh production.

**Beurré Bosc**, known for its distinctive russet brown skin, accounted for **10%** of fresh production.

**Corella**, an attractive pink/red blushed pear, accounted for **1%** of production.

### Seasonality by Pear Variety

The seasonal availability of some major varieties is profiled in the table below.

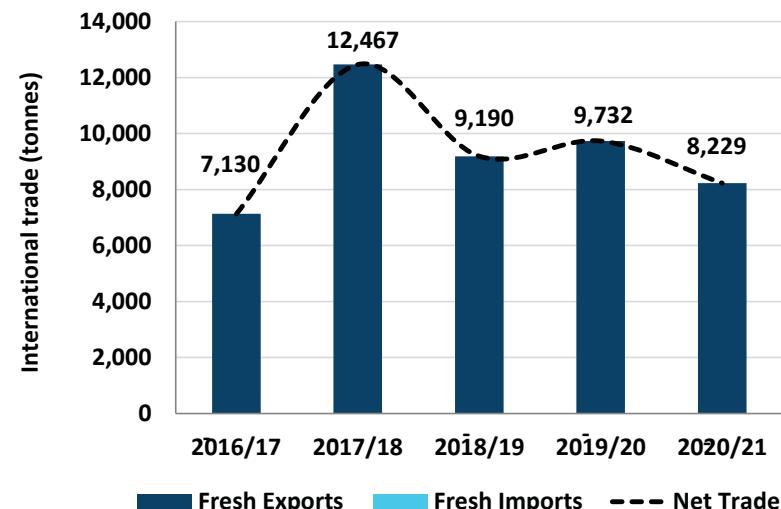
Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	44,839												
William	14,234												
Beurre Bosc	7,117												
Corella	712												
<i>Others</i>	4,270												
<b>Processed</b>	<b>53,166</b>												
Availability legend		High	Medium	Low									

Source: APAL

### Fresh Pears International Trade

For the year ending June 2021, Australia exported **8,229 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

#### Net Fresh Pears International Trade



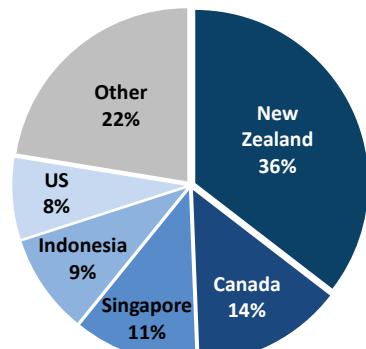
Source: GTA



## Pears

For the year ending June 2021, **36%** of exported fresh pears were sent to New Zealand, as profiled in the chart below.

2020/21 Fresh Pears Exports by Country



Source: GTA

Fresh Pears Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021
Victoria	8,592	9,361	7,935
New South Wales	258	160	146
Queensland	312	172	118
Western Australia	27	26	24
Tasmania	-	-	<0.5
<i>Other</i>	1	13	6
<b>TOTAL</b>	<b>9,190</b>	<b>9,732</b>	<b>8,229</b>

Fresh Pears Imports and Exports by Country

Exports by country (Tonnes)			
Year Ending June	2019	2020	2021
New Zealand	2,428	3,190	2,917
Canada	1,424	900	1,146
Singapore	1,297	1,533	942
Indonesia	1,597	1,694	757
US	48	485	622
<i>Other</i>	<b>2,396</b>	<b>1,930</b>	<b>1,845</b>
<b>TOTAL</b>	<b>9,190</b>	<b>9,732</b>	<b>8,229</b>

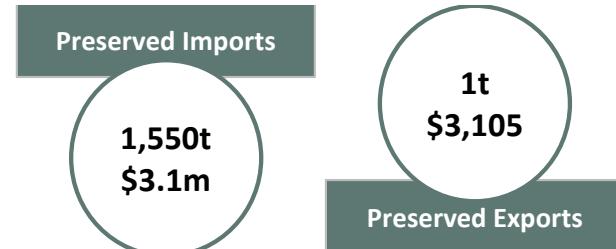
Source: GTA



## Pears

### Processed Pears International Trade

For the year ending June 2021, an additional **1,550 tonnes** of preserved pears were imported, while **1 tonne** was exported.



Source: GTA





## Persimmons

### Fresh Persimmons Overview

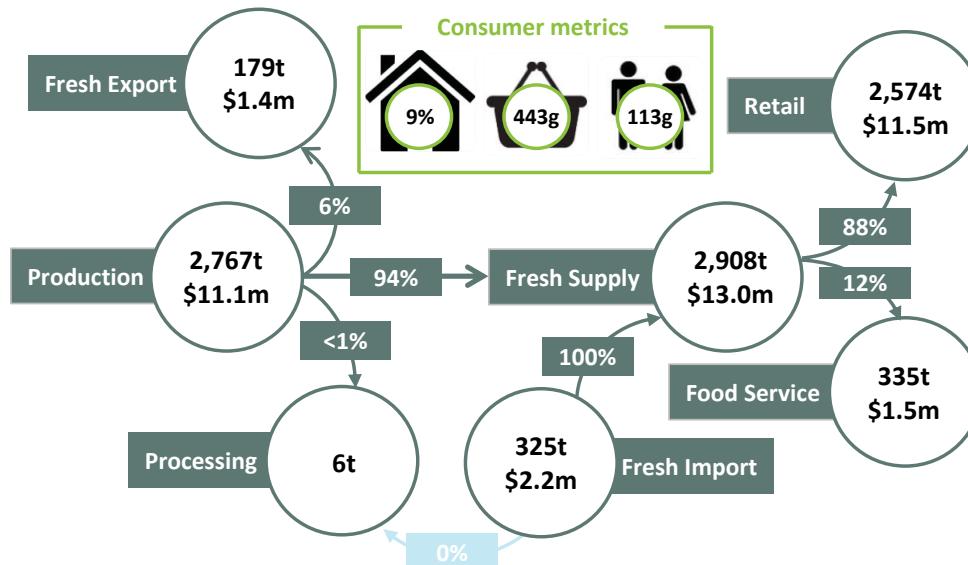
Persimmons are grown around Australia, with half of all production occurring in Queensland. There is a small export crop, but the majority of production is used in the fresh market.

For the year ending June 2021:

- **2,767 t** produced and valued at **\$11.1 m**.
- The wholesale value of the fresh supply was **\$13.0 m**, with **\$11.5 m** distributed into retail and **\$1.5 m** into food service.
- **9%** of Australian households purchased fresh persimmons, buying an average of **443 g** per shopping trip.
- The supply per capita was **113 g**, based on the volume supplied.



### Fresh Persimmons Supply Chain —Year Ending June 2021



Sources: AC; CFVWA; Persimmons Australia Inc. (PAus); GTA; MP & DD (Freshlogic Analysis)

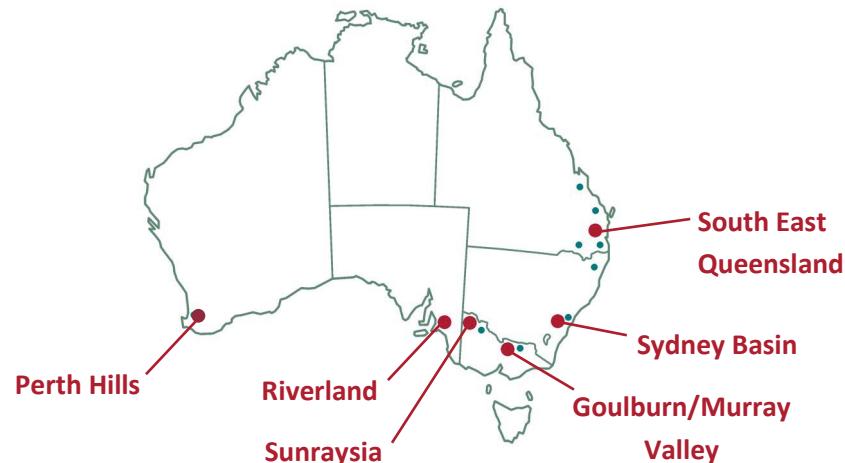
## Persimmons



Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	2,600	2,771	+7%	2,767	-1%
Production (\$m)	\$ 9.6	\$ 11.0	+14%	\$ 11.1	<1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	125	140	+12%	179	+28%
Fresh Export Value (\$m)	\$ 0.8	\$ 1.0	+21%	\$ 1.4	+42%
Fresh Import Volume (t)	635	602	-5%	325	-46%
Fresh Import Value (\$m)	\$ 3.2	\$ 3.3	<1%	\$ 2.2	-34%
Fresh Supply (t)	3,105	3,227	+4%	2,908	-10%
Fresh Supply Wholesale Value (\$m)	\$ 13.2	\$ 14.6	+11%	\$ 13.0	-11%
Supply per Capita (kg)	0.12	0.13	+2%	0.11	-10%
Retail Supply (t)	2,484	2,905	+17%	2,574	-11%
Retail Supply Wholesale Value (\$m)	\$ 10.6	\$ 13.2	+25%	\$ 11.5	-12%
Food Service Supply (t)	621	323	-48%	335	+4%
Food Service Wholesale Value (\$m)	\$ 2.6	\$ 1.5	-45%	\$ 1.5	+3%

Sources: AC; CFVWA; GTA; PAus; MP & DD (Freshlogic Analysis)

### Major Persimmons Production Areas



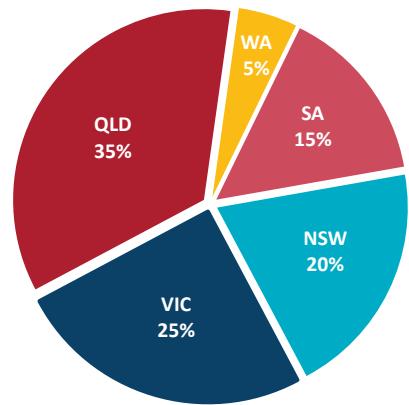
Source: PAus



## Persimmons



### 2020/21 Fresh Persimmons Production by State



Source: PAus

### Fresh Persimmons Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	553												
Victoria	692												
Queensland	968												
Western Australia	138												
South Australia	415												
Imported	325												
Availability legend		High	Medium	Low									

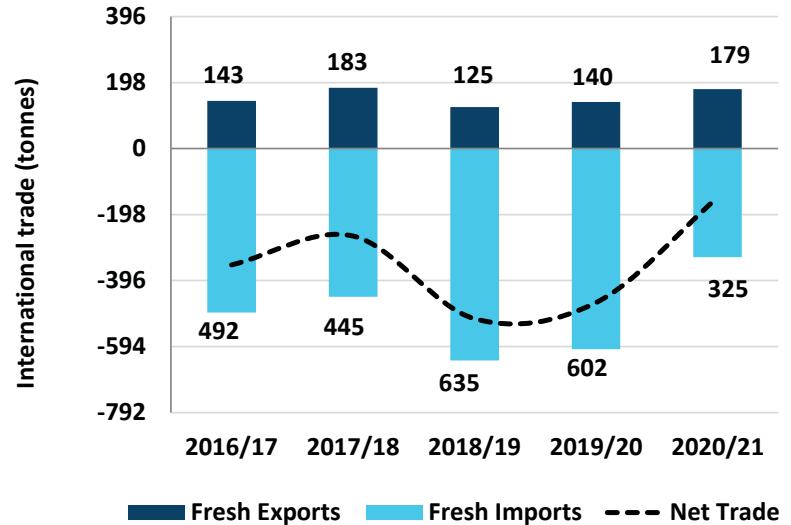
Source: PAus

### Fresh Persimmons International Trade

There is a small amount of international trade of persimmons, typically with more imports than exports. For the year ending June 2021, Australia exported **179 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Persimmons

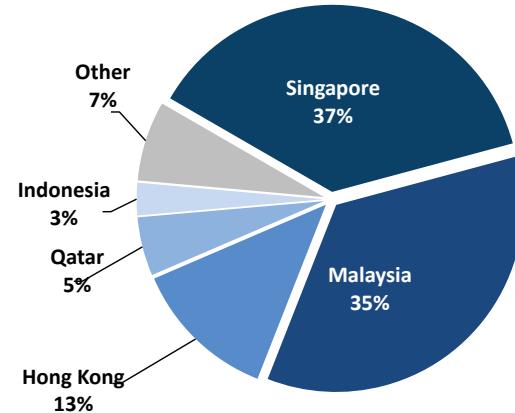
### Net Fresh Persimmons International Trade



Source: GTA

For the year ending June 2021, **37%** of exported persimmons were sent to Singapore, as profiled in the chart below.

### 2020/21 Fresh Persimmons Exports by Country



Source: GTA



## Persimmons

### Fresh Persimmons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	399	465	264	South Australia	23	45	78
Western Australia	65	42	55	Queensland	47	32	47
Victoria	123	82	6	Victoria	23	45	41
Queensland	49	12	-	New South Wales	17	16	11
<b>TOTAL</b>	<b>635</b>	<b>602</b>	<b>325</b>	Western Australia	9	1	-
				<b>TOTAL</b>	<b>125</b>	<b>140</b>	<b>179</b>

### Fresh Persimmons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New Zealand	605	601	321	Singapore	37	52	67
Sth. Korea	1	-	4	Malaysia	46	42	63
Japan	1	1	-	Hong Kong	12	23	22
US	29	-	-	Qatar	10	11	9
<b>TOTAL</b>	<b>635</b>	<b>602</b>	<b>325</b>	Indonesia	2	2	5
				<i>Other</i>	<b>17</b>	<b>9</b>	<b>12</b>
				<b>TOTAL</b>	<b>125</b>	<b>140</b>	<b>179</b>

Source: GTA

## Persimmons



### Fresh Persimmons Imports and Exports by State

### Fresh Persimmons Imports and Exports by Country





# Pineapples

## Fresh Pineapples Overview

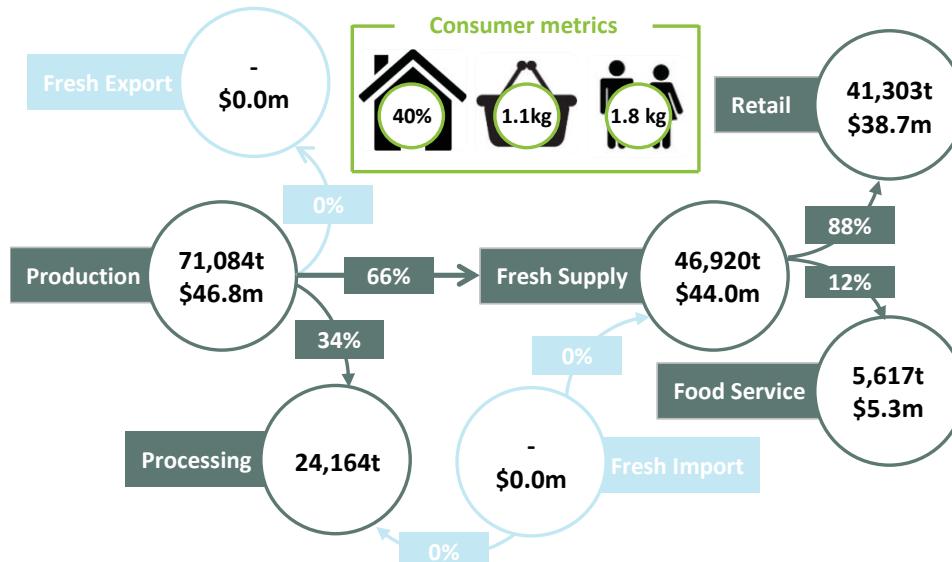
The majority of pineapple production occurs in Queensland. **34%** of pineapples grown in Australia in 2021 were sent to be processed, with the majority of this volume either tinned or juiced.

For the year ending June 2021:

- **71,084 t** was produced, valued at **\$46.8 m**, with **34%** sent to be processed.
- The wholesale value of the fresh supply was **\$44.0 m**, with **\$37.7 m** distributed into retail and **\$5.3 m** into food service.
- **40%** of Australian households purchased fresh pineapples, buying an average of **1.1 kg** per shopping trip.
- The supply per capita was **1.8 kg**, based on the volume supplied.



## Fresh Pineapples Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; Growcom; GTA; Queensland Department of Agriculture and Fisheries (QDAF); MP & DD (Freshlogic Analysis)

# Pineapples

Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	70,539	66,069	-6%	71,084	+8%
Production (\$m)	\$ 49.7	\$ 52.2	+5%	\$ 46.8	-10%
Production area (Ha)	2,265	2,039	-10%	2,170	+6%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	45,371	42,352	-7%	46,920	+11%
Fresh Supply Wholesale Value (\$m)	\$ 46.0	\$ 48.2	+5%	\$ 44.0	-9%
Supply per Capita (kg)	1.80	1.64	-9%	1.82	+11%
Retail Supply (t)	39,282	37,315	-5%	41,303	+11%
Retail Supply Wholesale Value (\$m)	\$ 39.8	\$ 42.5	+7%	\$ 38.7	-9%
Food Service Supply (t)	6,089	5,037	-17%	5,617	+12%
Food Service Wholesale Value (\$m)	\$ 6.2	\$ 5.7	-7%	\$ 5.3	-8%

Sources: AC; CFVWA; Growcom; GTA; QDAF; MP & DD (Freshlogic Analysis)

\*Note: Production area has been modified from those published in the previous edition of the handbook (2019/20 edition).

## Major Pineapple Production Areas

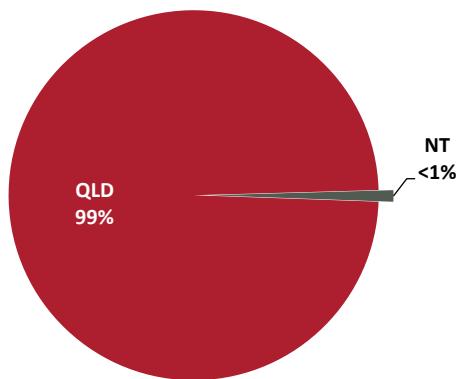


Source: QDAF



## Pineapples

2020/21 Fresh Pineapple Production by State



Sources: ABS; (Freshlogic Analysis)

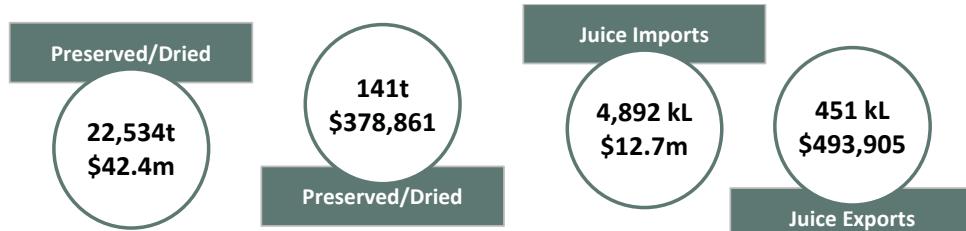
### Fresh Pineapple Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	70,373												
Northern Territory	711												
Availability legend		High	Medium	Low									

Source: (Freshlogic Analysis); QDAF

### Processed Pineapple International Trade

For the year ending June 2021, an additional **22,534 tonnes** of preserved pineapples were imported, while **141 tonnes** were exported. Australia also imported **4,892 kilo litres** of pineapple juice, while exporting **451 kilo litres** of pineapple juice.



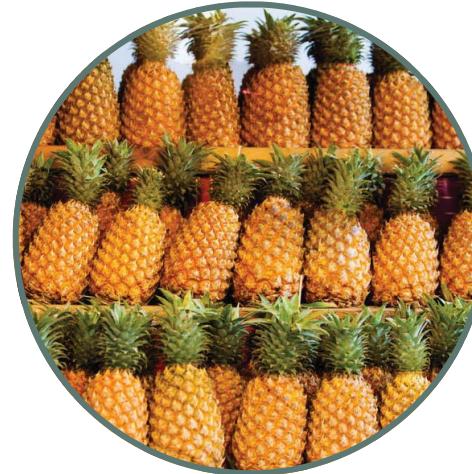
Source: GTA

## Pineapples



2020/21 Australian Horticulture Statistics Handbook

10/02/2022





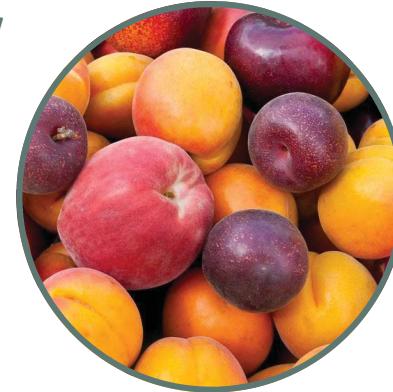
## Summerfruit—Overview

### Fresh Summerfruit Overview

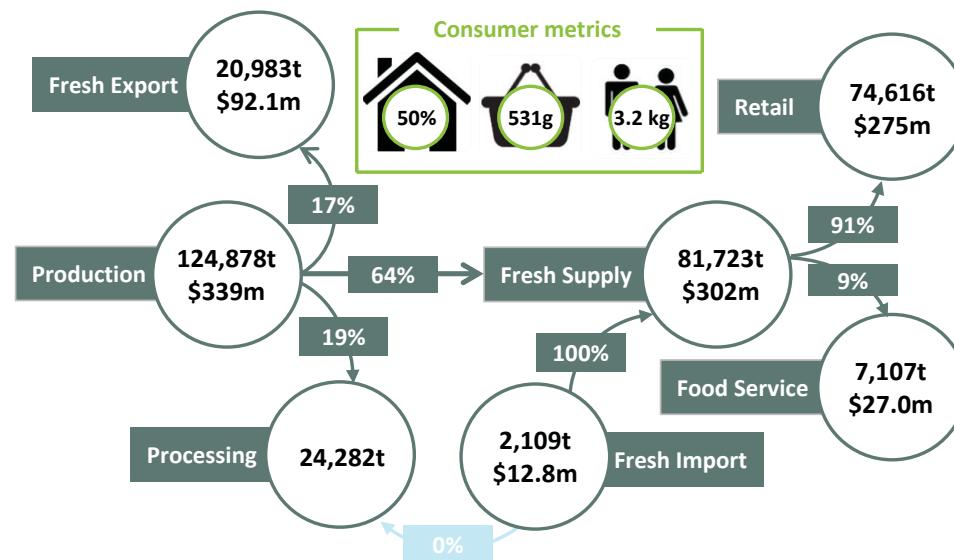
Pages 192-193 profile total summerfruit production and trade. They combine information on apricots, nectarines/peaches and plums. The following pages profile each summerfruit category in more detail.

For the year ending June 2021:

- **124,878 t** produced and valued at **\$339 m**.
- The wholesale value of the fresh supply was **\$302 m**, with **\$275 m** distributed into retail and **\$27.0 m** into food service.
- **50%** of Australian households purchased a summerfruit, buying an average of **531 g** per shopping trip.
- The supply per capita of summerfruit was **3.2 kg**, based on the volume supplied.



### Fresh Summerfruit Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)

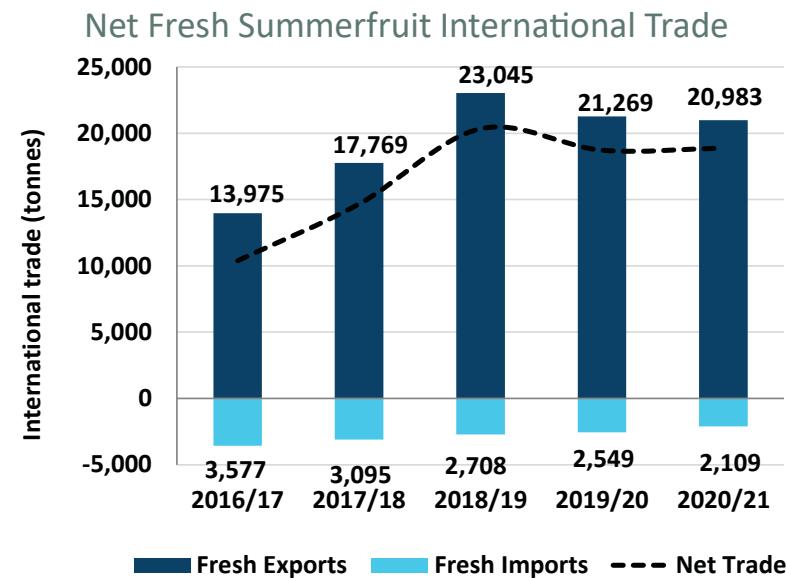
## Summerfruit—Overview



Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	
Production (t)	161,039	137,717	-14%	124,878	-9%
Production (\$m)	\$ 461.0	\$ 413.9	-10%	\$ 338.9	-18%
Producing Trees (000 Trees)	-	5,817	-	-	-
Fresh Export Volume (t)	23,045	21,269	-8%	20,983	-1%
Fresh Export Value (\$m)	\$ 89.0	\$ 89.1	<1%	\$ 92.1	+3%
Fresh Import Volume (t)	2,708	2,549	-6%	2,109	-17%
Fresh Import Value (\$m)	\$ 15.6	\$ 14.1	-10%	\$ 12.8	-9%
Fresh Supply (t)	108,278	92,448	-15%	81,723	-12%
Fresh Supply Wholesale Value (\$m)	\$ 449.0	\$ 394.8	-12%	\$ 301.7	-24%
Supply per Capita (kg)	4.30	3.58	-17%	3.17	-11%
Retail Supply (t)	97,822	84,369	-14%	74,616	-12%
Retail Supply Wholesale Value (\$m)	\$ 405.1	\$ 359.8	-11%	\$ 274.7	-24%
Food Service Supply (t)	10,456	8,079	-23%	7,107	-12%
Food Service Wholesale Value (\$m)	\$ 43.9	\$ 35.0	-20%	\$ 27.0	-23%

Sources: ABS; AC; CFVWA; GTA; SAL; MP & DD (Freshlogic Analysis)

### Fresh Summerfruit International Trade



Source: GTA



## Summerfruit—Apricots

### Fresh Apricots Overview

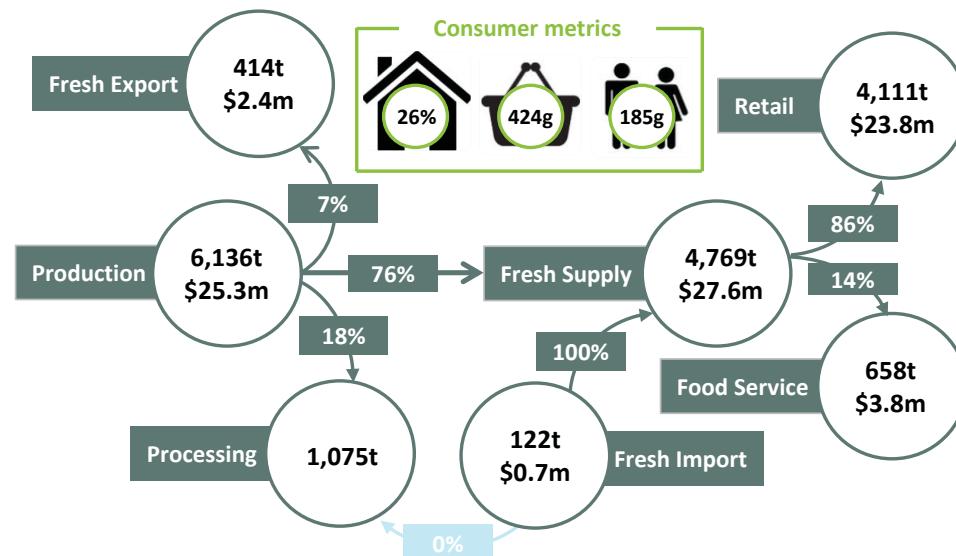
The majority of apricot production occurs in the southern states. Approximately a fifth of apricots grown in Australia are sent to be processed, either tinned or dried.

For the year ending June 2021:

- **6,136 t** produced and valued at **\$25.3 m** with **18%** sent to be processed.
- The wholesale value of the fresh supply was **\$27.6 m**, with **\$23.8 m** distributed into retail and **\$3.8 m** into food service.
- **26%** of Australian households purchased fresh apricots, buying an average of **424 g** per shopping trip.
- The supply per capita was **185 g**, based on the volume supplied.



### Fresh Apricots Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)

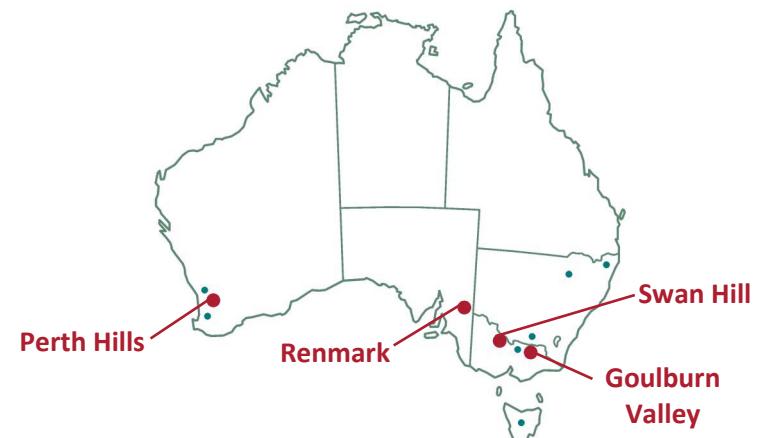
## Summerfruit—Apricots

### Year Ending June

Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	9,028	7,275	-19%	6,136	-16%
Production (\$m)	\$ 35.1	\$ 29.4	-16%	\$ 25.3	-14%
Producing Trees (000 Trees)	-	587	-	-	-
Fresh Export Volume (t)	561	885	+58%	414	-53%
Fresh Export Value (\$m)	\$ 2.4	\$ 4.1	+73%	\$ 2.4	-43%
Fresh Import Volume (t)	339	484	+43%	122	-75%
Fresh Import Value (\$m)	\$ 1.6	\$ 2.6	+66%	\$ 0.7	-74%
Fresh Supply (t)	7,224	5,599	-22%	4,769	-15%
Fresh Supply Wholesale Value (\$m)	\$ 40.0	\$ 32.6	-18%	\$ 27.6	-15%
Supply per Capita (kg)	0.29	0.22	-24%	0.19	-15%
Retail Supply (t)	6,174	4,827	-22%	4,111	-15%
Retail Supply Wholesale Value (\$m)	\$ 34.2	\$ 28.1	-18%	\$ 23.8	-15%
Food Service Supply (t)	1,050	772	-26%	658	-15%
Food Service Wholesale Value (\$m)	\$ 5.8	\$ 4.5	-23%	\$ 3.8	-15%

Sources: ABS; AC; CFVWA; GTA; SAL; MP & DD (Freshlogic Analysis)

### Major Apricots Production Areas



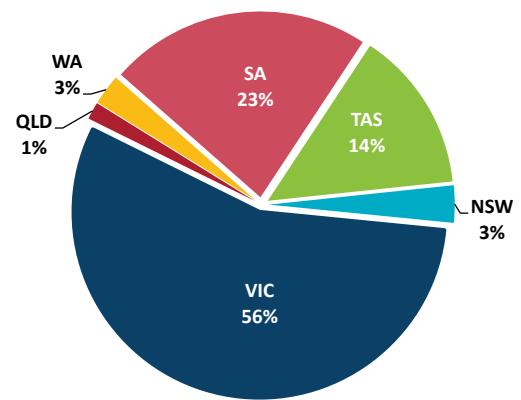
Source: SAL





## Summerfruit—Apricots

2020/21 Fresh Apricots Production by State



Source: SAL

Fresh Apricots Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	199												
Victoria	3,421												
Queensland	92												
Western Australia	162												
South Australia	1,399												
Tasmania	862												
Availability legend		<span style="background-color: #808000; width: 10px; height: 10px;"></span>	High	<span style="background-color: #80B000; width: 10px; height: 10px;"></span>	Medium	<span style="background-color: #B0E0A0; width: 10px; height: 10px;"></span>	Low						None

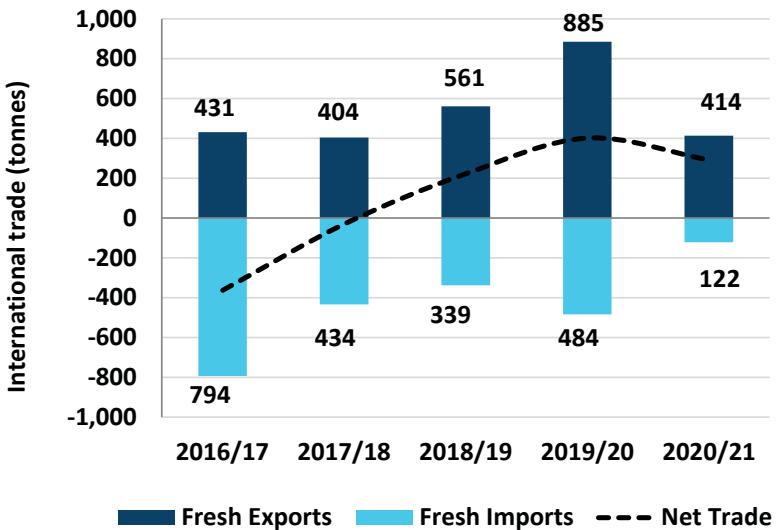
Source: SAL

## Fresh Apricots International Trade

Australia is a net exporter of fresh apricots. For the year ending June 2021, Australia exported **414 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Summerfruit—Apricots

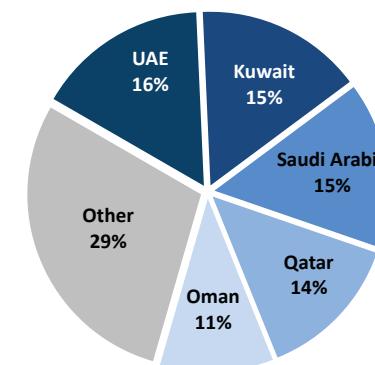
Net Fresh Apricot International Trade



Source: GTA

For the year ending June 2021, **16%** of exported fresh apricots were sent to United Arab Emirates as profiled in the chart below.

2020/21 Fresh Apricots Exports by Country



Source: GTA





## Summerfruit—Apricots

### Fresh Apricots Imports and Exports by State

Year Ending June	Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	117	229	46	Victoria	470	672	362
Western Australia	60	76	43	New South Wales	74	193	44
Victoria	144	180	27	Queensland	10	13	3
Queensland	18	-	6	South Australia	5	3	1
Other	-	0	<0.5	Tasmania	<0.5	1	1
<b>TOTAL</b>	<b>339</b>	<b>484</b>	<b>122</b>	<b>Other</b>	<b>3</b>	<b>4</b>	<b>3</b>
				<b>TOTAL</b>	<b>561</b>	<b>885</b>	<b>414</b>

### Fresh Apricots Imports and Exports by Country

Year Ending June	Imports by country (Tonnes)			Exports by country (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
New Zealand	301	479	108	UAE	52	95	66
US	11	3	14	Kuwait	85	118	64
Turkey	27	-	1	Saudi Arabia	164	311	64
Pakistan	-	2	-	Qatar	41	54	56
India	-	<0.5	-	Oman	55	71	44
Other	-	<0.5	<0.5	Other	163	236	119
<b>TOTAL</b>	<b>339</b>	<b>484</b>	<b>122</b>	<b>TOTAL</b>	<b>561</b>	<b>885</b>	<b>414</b>

Source: GTA

### Processed Apricots International Trade

For the year ending June 2021, an additional **3,837 tonnes** of dried apricots and **2,734 tonnes** of preserved apricots were imported, while **24 tonnes** of dried apricots and **39 tonnes** of preserved apricots were exported.



Source: GTA

## Summerfruit—Apricots



### Fresh Apricots Imports and Exports by State

### Fresh Apricots Imports and Exports by Country





## Fresh Nectarines/ Peaches Overview

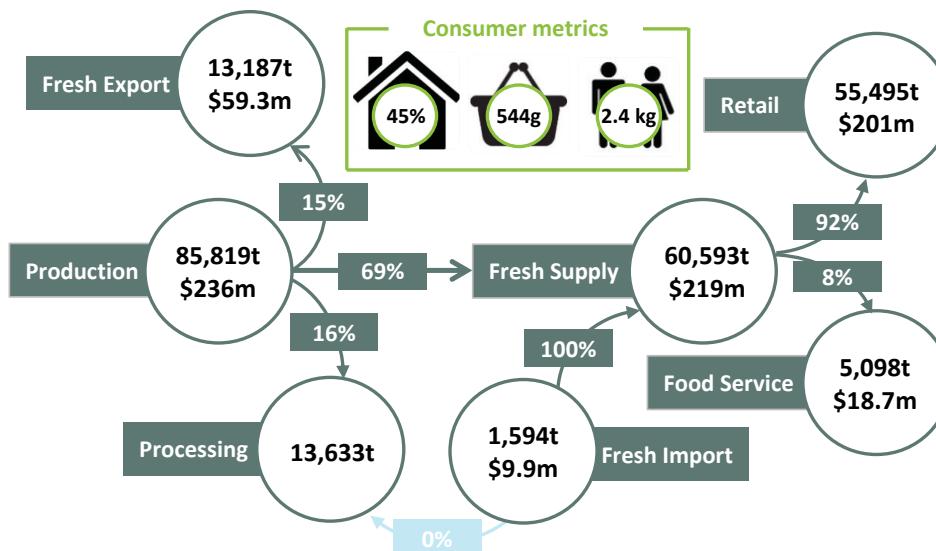
The majority of nectarine and peach production occurs in the south of Australia, with Victoria being the major producing state.

For the year ending June 2021:

- **85,819 t** produced and valued at **\$236 m** with **16%** sent to be processed. Majority are peaches destined for canning.
- The wholesale value of the fresh supply was **\$219.2 m**, with **\$200.5 m** distributed into retail and **\$18.7 m** into food service.
- **45%** of Australian households purchased fresh nectarines and peaches, buying an average of **544 g** per shopping trip.
- The supply per capita was **2.4 kg**, based on the volume supplied.



### Fresh Nectarines/Peaches Supply Chain—Year Ending June 2021



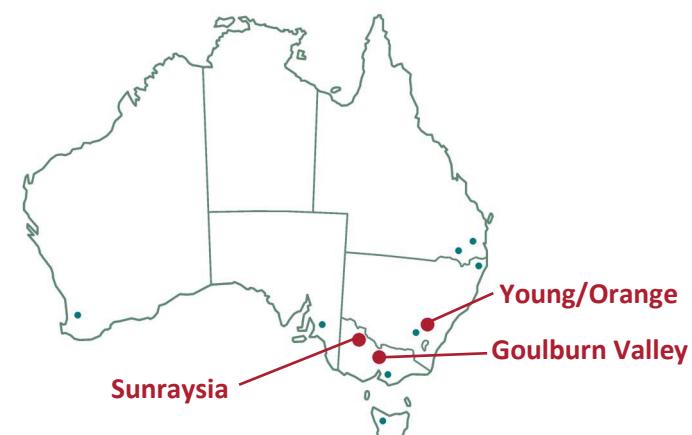
Sources: ABS; AC; CFVWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)



Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	119,771	103,094	-14%	85,819	-17%
Production (\$m)	\$ 350.3	\$ 310.1	-11%	\$ 236.1	-24%
Producing Trees (000 Trees)	3,316	3,633	+10%	-	-
Fresh Export Volume (t)	15,645	15,170	-3%	13,187	-13%
Fresh Export Value (\$m)	\$ 61.6	\$ 64.4	+4%	\$ 59.3	-8%
Fresh Import Volume (t)	2,030	1,717	-15%	1,594	-7%
Fresh Import Value (\$m)	\$ 12.1	\$ 9.5	-21%	\$ 9.9	+4%
Fresh Supply (t)	84,688	72,320	-15%	60,593	-16%
Fresh Supply Wholesale Value (\$m)	\$ 351.2	\$ 301.2	-14%	\$ 219.2	-27%
Supply per Capita (kg)	3.36	2.80	-17%	2.35	-16%
Retail Supply (t)	76,770	66,213	-14%	55,495	-16%
Retail Supply Wholesale Value (\$m)	\$ 318.4	\$ 275.7	-13%	\$ 200.5	-27%
Food Service Supply (t)	7,919	6,107	-23%	5,098	-17%
Food Service Wholesale Value (\$m)	\$ 32.8	\$ 25.4	-22%	\$ 18.7	-27%

Sources: ABS; AC; CFVWA; GTA; SAL; MP & DD (Freshlogic Analysis)

## Major Nectarine/Peach Production Areas

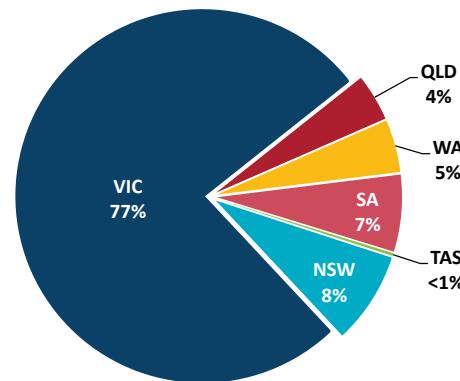


Source: SAL



## Summerfruit—Nectarines/Peaches

### 2020/21 Fresh Nectarines/Peaches Production by State



Source: SAL

### Fresh Nectarines/Peaches Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	6,961												
Victoria	65,286												
Queensland	3,583												
Western Australia	4,025												
South Australia	5,746												
Tasmania	218												
Imported	1,594												
Availability legend		High	Medium	Low									

Source: SAL

### Main Categories

Nectarines accounted for **62%** of combined production for the year ending June 2021.

Peaches accounted for **38%** of combined production for the year ending June 2021.

## Summerfruit—Nectarines/Peaches

### Seasonality by Category

The seasonal availability of nectarines and peaches is profiled in the table below.

Variety	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Nectarines	52,910												
Peaches	32,909												

Availability legend

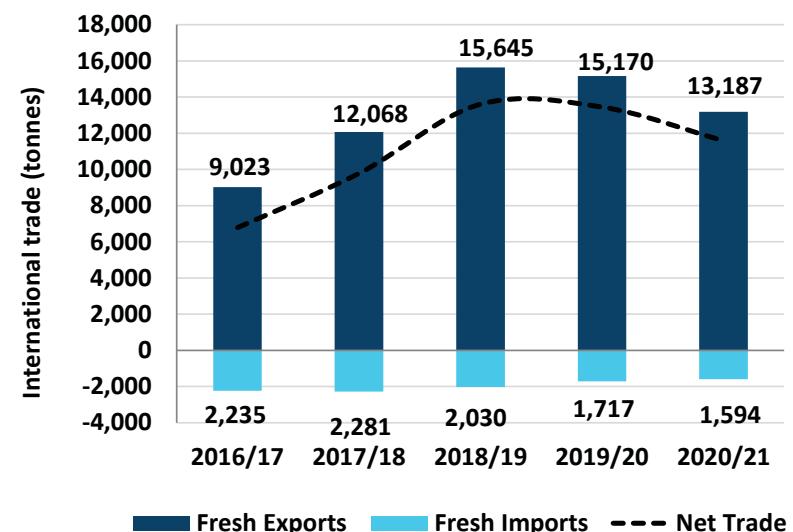
High      Medium      Low      None

Source: SAL

### Fresh Nectarines/Peaches International Trade

Australia is a net exporter of fresh nectarines and peaches, with exports growing in recent years. For the year ending June 2021, Australia exported **13,187 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Nectarines/Peaches International Trade



Source: GTA

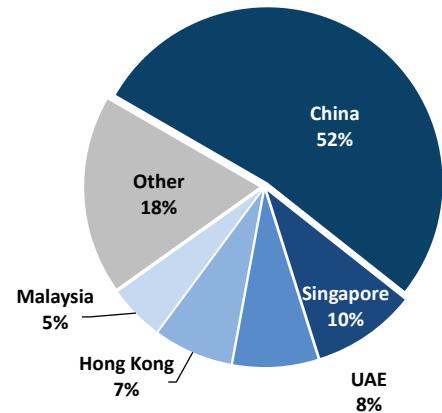




## Summerfruit—Nectarines/Peaches

For the year ending June 2021, **54%** of exported fresh nectarines and peaches were sent to China, as profiled in the chart below.

2020/21 Fresh Nectarines/Peaches Exports by Country



Source: GTA

Fresh Nectarines/Peaches Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	1,281	1,028	1,030	Victoria	13,625	13,778	12,172
Victoria	345	434	295	New South Wales	1,023	1,028	744
Western Australia	323	220	253	South Australia	644	143	221
Queensland	81	36	16	Queensland	274	186	46
<i>Other</i>	-	-	<0.5	Western Australia	62	20	2
<b>TOTAL</b>	<b>2,030</b>	<b>1,717</b>	<b>1,594</b>	<i>Other</i>	<b>17</b>	<b>15</b>	<b>2</b>
				<b>TOTAL</b>	<b>15,645</b>	<b>15,170</b>	<b>13,187</b>

Fresh Nectarines/Peaches Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
US	2,015	1,626	1,583	China	6,707	7,685	6,899
New Zealand	15	9	11	Singapore	1,596	1,270	1,250
China	-	61	-	UAE	1,652	1,067	1,025
<i>Other</i>	<0.5	20	<0.5	Hong Kong	943	517	951
<b>TOTAL</b>	<b>2,030</b>	<b>1,717</b>	<b>1,594</b>	Malaysia	709	647	665
				<i>Other</i>	<b>4,039</b>	<b>3,984</b>	<b>2,397</b>
				<b>TOTAL</b>	<b>15,645</b>	<b>15,170</b>	<b>13,187</b>

Source: GTA

## Summerfruit—Nectarines/Peaches

### Processed Nectarines/Peaches International Trade

For the year ending June 2021, an additional **8,762 tonnes** of preserved peaches were imported, while **269 tonnes** were exported.



Source: GTA





## Summerfruit—Plums

### Fresh Plums Overview

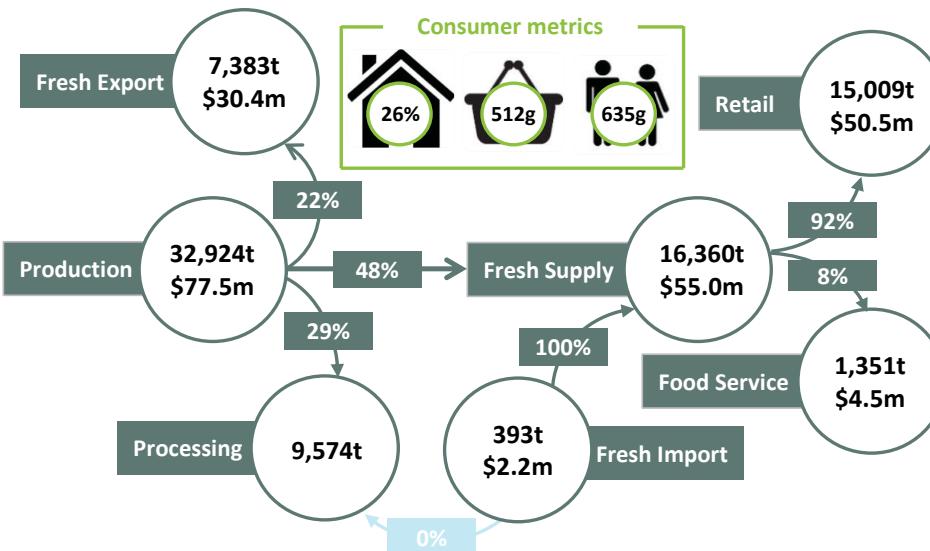
The majority of plum production occurs in the southern states, with Victoria being the major producing state.

For the year ending June 2021:

- **32,924 t** produced and valued at **\$77.5 m**.
- The wholesale value of the fresh supply was **\$55.0 m**, with **\$50.5 m** distributed into retail and **\$4.5 m** into food service.
- **26%** of Australian households purchased fresh plums, buying an average of **512 g** per shopping trip.
- The supply per capita was **635 g**, based on the volume supplied.



### Fresh Plums Supply Chain—Year Ending June 2021



Sources: ABS; AC; CFVWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)

## Summerfruit—Plums



Year Ending June	2019	2020	2021		
	Value	Value	% YoY	Value	% YoY
Production (t)	32,241	27,348	-15%	32,924	+20%
Production (\$m)	\$ 75.7	\$ 74.4	-2%	\$ 77.5	+4%
Producing Trees (000 Trees)	-	1,488	-	-	-
Fresh Export Volume (t)	6,839	5,214	-24%	7,383	+42%
Fresh Export Value (\$m)	\$ 25.0	\$ 20.6	-18%	\$ 30.4	+48%
Fresh Import Volume (t)	339	348	+3%	393	+13%
Fresh Import Value (\$m)	\$ 2.0	\$ 1.9	-3%	\$ 2.2	+14%
Fresh Supply (t)	16,366	14,529	-11%	16,360	+13%
Fresh Supply Wholesale Value (\$m)	\$ 57.8	\$ 61.0	+6%	\$ 55.0	-10%
Supply per Capita (kg)	0.65	0.56	-13%	0.64	+13%
Retail Supply (t)	14,878	13,329	-10%	15,009	+13%
Retail Supply Wholesale Value (\$m)	\$ 52.5	\$ 56.0	+7%	\$ 50.5	-10%
Food Service Supply (t)	1,488	1,200	-19%	1,351	+13%
Food Service Wholesale Value (\$m)	\$ 5.3	\$ 5.0	-4%	\$ 4.5	-10%

Sources: ABS; AC; CFVWA; GTA; SAL; MP & DD (Freshlogic Analysis)

### Major Plum Production Areas

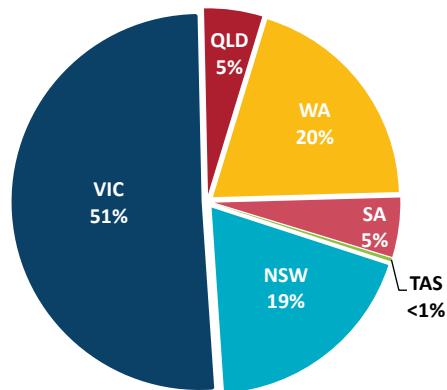


Source: SAL



## Summerfruit—Plums

2020/21 Fresh Plums Production by State



Source: SAL

Fresh Plums Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	6,231												
Victoria	16,701												
Queensland	1,667												
Western Australia	6,532												
South Australia	1,700												
Tasmania	92												
Imported	393												
Availability legend		High	Medium	Low									

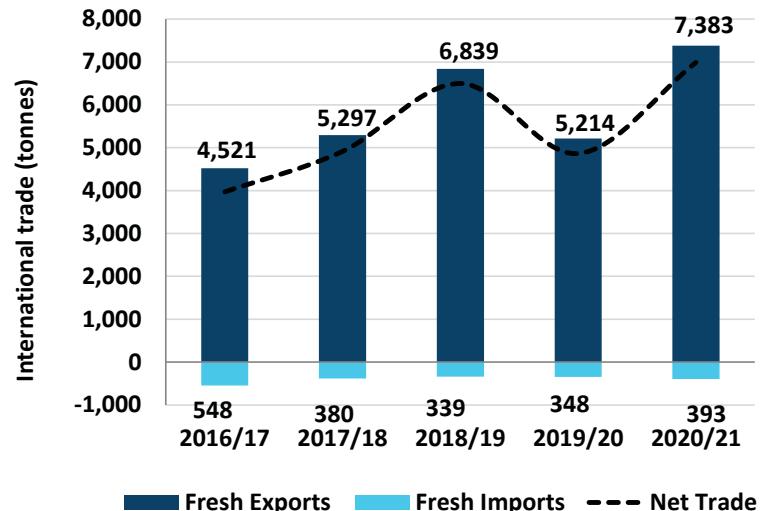
Source: SAL

## Fresh Plums International Trade

Australia is a net exporter of fresh plums, typically exporting between **5,000-8,000 tonnes** per year. For the year ending June 2021, Australia exported **8,089 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Summerfruit—Plums

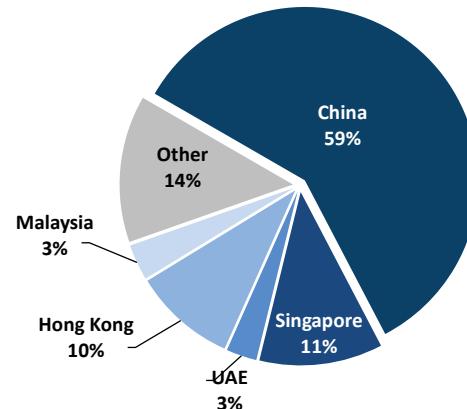
Net Fresh Plums International Trade



Source: GTA

For the year ending June 2021, **59%** of exported fresh plums were sent to China, as profiled in the chart below.

2020/21 Fresh Plums Exports by Country



Source: GTA





## Summerfruit—Plums



## Summerfruit—Plums

### Fresh Plums Imports and Exports by State

Year Ending June	Imports by state destination (Tonnes)			Exports by state of production origin (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
New South Wales	228	269	243	Victoria	4,359	3,750	6,029
Victoria	55	37	98	New South Wales	1,506	956	934
Western Australia	56	42	51	Western Australia	572	456	330
<b>TOTAL</b>	<b>339</b>	<b>348</b>	<b>393</b>	South Australia	54	29	81
				Queensland	329	15	8
				<i>Other</i>	20	9	<0.5
				<b>TOTAL</b>	<b>6,839</b>	<b>5,214</b>	<b>7,383</b>

### Fresh Plums Imports and Exports by Country

Year Ending June	Imports by country (Tonnes)			Exports by country (Tonnes)			
	2019	2020	2021	Year Ending June	2019	2020	2021
US	338	348	392	China	2,604	2,728	4,356
India	-	-	1	Singapore	964	651	849
Afghanistan	-	-	<0.5	Hong Kong	1,515	423	707
Pakistan	-	-	<0.5	Indonesia	999	869	469
Iran	1	-	-	Malaysia	346	229	248
<i>Other</i>	-	-	1	<i>Other</i>	411	314	754
<b>TOTAL</b>	<b>339</b>	<b>348</b>	<b>393</b>	<b>TOTAL</b>	<b>6,839</b>	<b>5,214</b>	<b>7,383</b>

Source: GTA





## Table Grapes

### Fresh Table Grapes Overview

Table grapes are grown across all states of Australia, with Victoria being the major producing state.

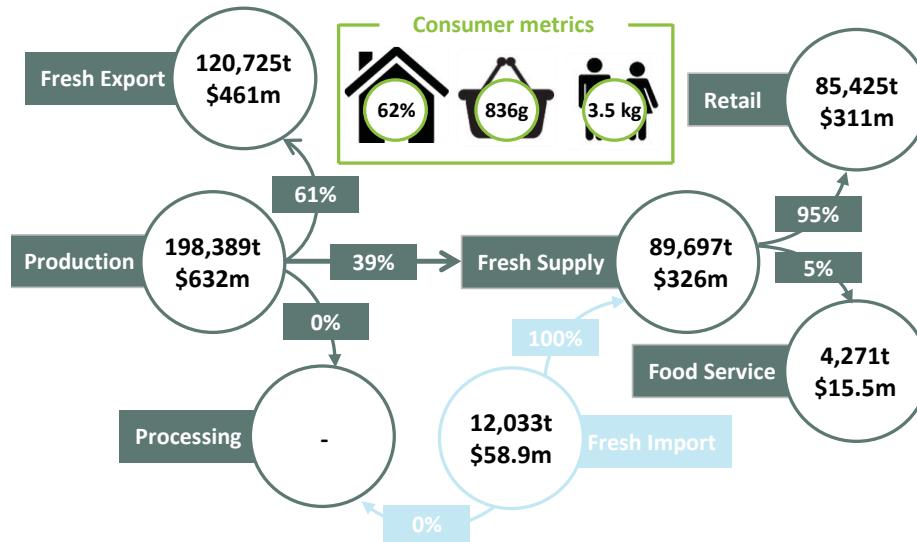
For the year ending June 2021:

- **198,389 t** produced and valued at **\$632 m**.
- The wholesale value of the fresh supply was **\$326 m**, with **\$311 m** distributed into retail and **\$15.5 m** into food service.
- **62%** of Australian households purchased table grapes, buying an average of **836 g** per shopping trip.
- The supply per capita was **3.5 kg**, based on the volume supplied.



*Note: Table grape volumes do not include grapes grown for wine or drying. Dried grape production can be found on page 218. Wine grapes are not covered in this handbook.*

### Fresh Table Grapes Supply Chain—Year Ending June 2021



Sources: AC, Australian Table Grape Association (ATGA); CFVWA; GTA; MP & DD (Freshlogic Analysis)

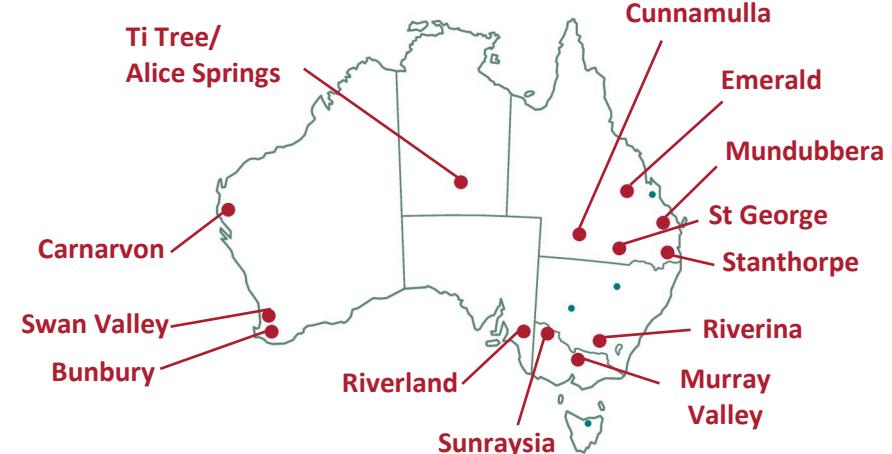
## Table Grapes



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	208,277	214,660	+3%	198,389	-8%
Production (\$m)	\$ 693.2	\$ 750.4	+8%	\$ 631.8	-16%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	146,093	152,180	+4%	120,725	-21%
Fresh Export Value (\$m)	\$ 555.2	\$ 622.9	+12%	\$ 460.7	-26%
Fresh Import Volume (t)	16,809	16,364	-3%	12,033	-26%
Fresh Import Value (\$m)	\$ 81.3	\$ 85.1	+5%	\$ 58.9	-31%
Fresh Supply (t)	78,993	78,843	>-1%	89,697	+14%
Fresh Supply Wholesale Value (\$m)	\$ 330.8	\$ 328.1	>-1%	\$ 326.3	>-1%
Supply per Capita (kg)	3.13	3.06	-2%	3.48	+14%
Retail Supply (t)	75,231	75,448	<1%	85,425	+13%
Retail Supply Wholesale Value (\$m)	\$ 315.0	\$ 314.0	>-1%	\$ 310.8	-1%
Food Service Supply (t)	3,762	3,395	-10%	4,271	+26%
Food Service Wholesale Value (\$m)	\$ 15.8	\$ 14.1	-10%	\$ 15.5	+10%

Sources: AC; ATGA; CFVWA; GTA; MP & DD (Freshlogic Analysis)

### Major Table Grape Production Areas



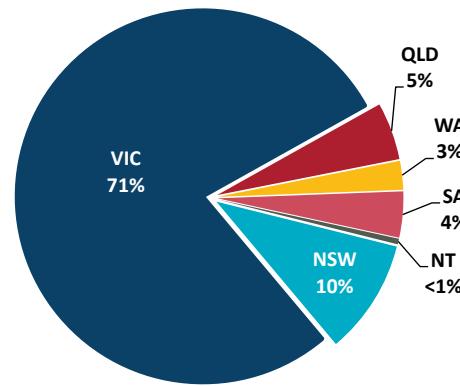
Source: ATGA



## Table Grapes



### 2020/21 Fresh Table Grapes Production by State



Source: ATGA

### Fresh Table Grapes Seasonality by State

State	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	19,839												
Victoria	154,743												
Queensland	9,919												
Western Australia	4,980												
South Australia	7,936												
Northern Territory	972												
Imported	12,033												
Availability legend		High	Medium	Low									

Source: ATGA

### Main Table Grape Varieties

Although there are currently a number of varieties grown in Australia, production for the fresh market is dominated by 3 main varieties. These include:

**Menindee** and **Thompson**, the two most common green varieties in Australia.

These grapes accounted for **38%** of fresh production for the year ending June 2020.

**Crimson**, **Flame** and **Globe**, the main red varieties in Australia. These three varieties accounted for **30%** of fresh production.

## Table Grapes

### Seasonality by Table Grape Variety

The seasonal availability of some major varieties is profiled in the table below.

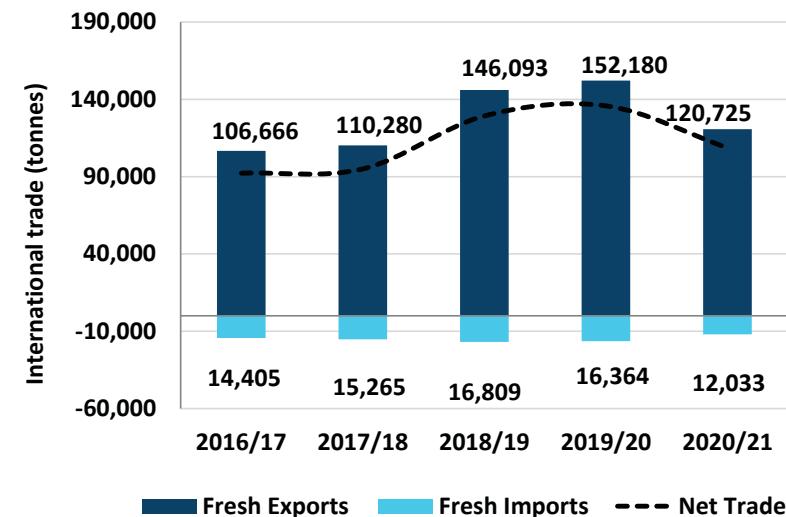
Variety	20/21 Tonnnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Menindee	25,791												
White - Thompson	49,597												
Red - Crimson	37,694												
Red - Flame	11,903												
Red - Globe	9,919												
Black	7,904												
<b>Other</b>	<b>55,581</b>												
Availability legend		High	Medium	Low									

Source: ATGA

### Fresh Table Grapes International Trade

Australia is a net exporter of fresh table grapes, with exports growing in recent years. For the year ending June 2021, Australia exported **120,725 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

#### Net Fresh Table Grapes International Trade



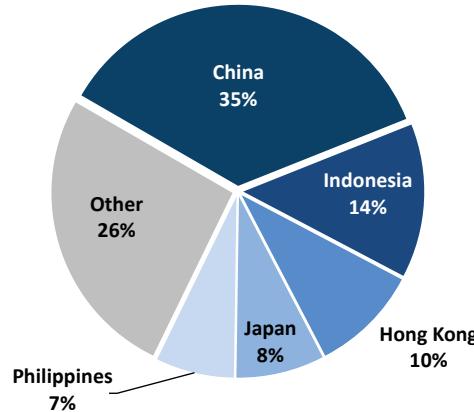
Source: GTA



## Table Grapes

For the year ending June 2021, **35%** of exported fresh table grapes were sent to China, as profiled in the chart below.

2020/21 Fresh Table Grapes Exports by Country



Source: GTA

Fresh Table Grapes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
Victoria	7,519	5,223	6,186	Victoria	132,920	137,666	107,742
New South Wales	6,650	8,725	4,882	New South Wales	11,328	12,387	8,861
Western Australia	1,273	1,406	779	Queensland	213	474	3,746
South Australia	-	-	166	South Australia	362	415	137
Queensland	1,367	1,010	20	Western Australia	1,246	1,169	103
<b>TOTAL</b>	<b>16,809</b>	<b>16,364</b>	<b>12,033</b>	<b>Other</b>	<b>25</b>	<b>68</b>	<b>137</b>
				<b>TOTAL</b>	<b>146,093</b>	<b>152,180</b>	<b>120,725</b>

## Table Grapes



### 2020/21 Australian Horticulture Statistics Handbook

2020/21 Australian Horticulture Statistics Handbook

10/02/2022



Fresh Table Grapes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2019	2020	2021	Year Ending June	2019	2020	2021
US	16,696	15,688	11,306	China	56,432	62,930	43,013
Mexico	8	530	663	Indonesia	23,200	13,321	16,594
China	98	111	55	Hong Kong	7,980	9,152	11,648
Sth. Korea	7	35	8	Japan	13,421	11,430	9,504
<b>TOTAL</b>	<b>16,809</b>	<b>16,364</b>	<b>12,033</b>	Philippines	7,412	8,172	8,446
				<b>Other</b>	<b>37,648</b>	<b>47,176</b>	<b>31,520</b>
				<b>TOTAL</b>	<b>146,093</b>	<b>152,180</b>	<b>120,725</b>

Source: GTA



## Dried Grapes

### Dried Grapes Overview

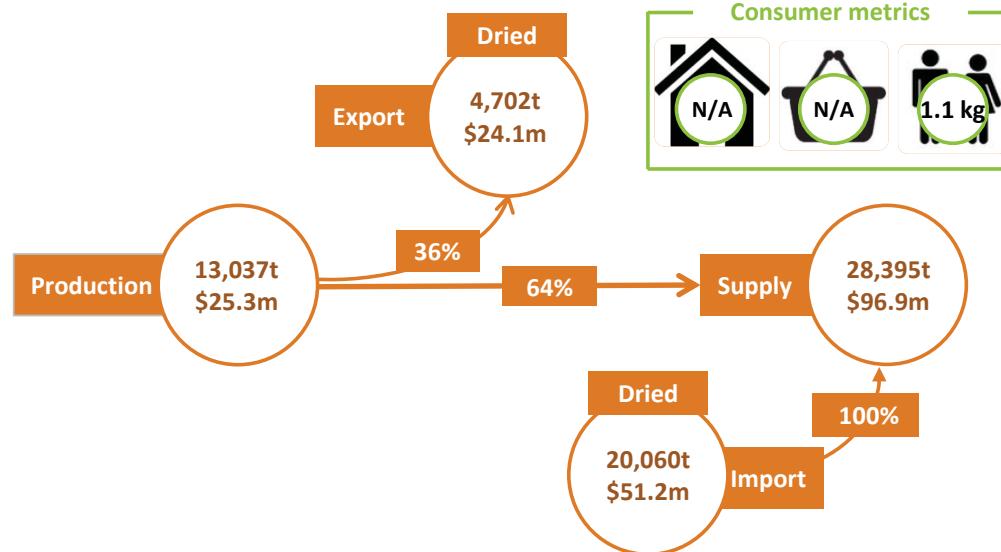
Grapes grown for drying are predominantly grown in Victoria and New South Wales and South Australia with **Sunraysia** being the major producing area. The main varieties grown for dried grapes include sultanas, sunmuscats, currants and raisins.



For the year ending June 2021:

- **13,037 t** of dried grapes were produced and valued at **\$25.3 m**.
- The wholesale value of the dried supply was **\$96.9 m**.
- The dried supply per capita was **1.1 kg**, based on the volume supplied.

### Dried Grapes Supply Chain—Year Ending June 2021



Sources: AC; CFVWA; Dried Fruits Australia (DFA); GTA; MP & DD (Freshlogic Analysis)

## Dried Grapes



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	15,248	13,250	-13%	13,037	-2%
Production (\$m)	\$ 29.2	\$ 29.1	>-1%	\$ 25.3	-13%
Production area (Ha)	3,774	3,257	-14%	3,257	-
Dried Export Volume (t)	5,368	5,267	-2%	4,702	-11%
Dried Export Value (\$m)	\$ 25.1	\$ 30.5	+22%	\$ 24.1	-21%
Dried Import Volume (t)	20,817	22,214	+7%	20,060	-10%
Dried Import Value (\$m)	\$ 55.3	\$ 67.7	+23%	\$ 51.2	-24%
Dried Supply (t)	30,696	30,197	-2%	28,395	-6%
Dried Supply Wholesale Value (\$m)	\$ 109.1	\$ 123.2	+13%	\$ 96.9	-21%
Supply per Capita (kg)	1.22	1.17	-4%	1.10	-6%

Sources: AC; CFVWA; DFA; GTA; MP & DD (Freshlogic Analysis)

### Major Dried Grape Production Areas

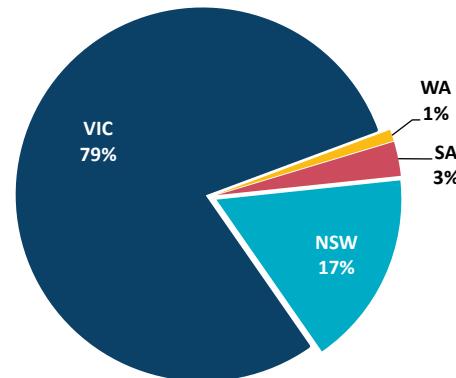


Source: DFA



## Dried Grapes

2020/21 Dried Grapes Production by State



Source: DFA

Dried Grapes Production Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,216												
Victoria	10,429												
South Australia	391												
Fresh production legend		High	Medium	Low									None

Source: DFA

## Main Dried Grape Varieties

Although there are currently a number of varieties grown in Australia, production for the dried grape market is dominated by 4 main types. These include:

**Sultana types**, which are the most commonly dried grape variety in Australia.

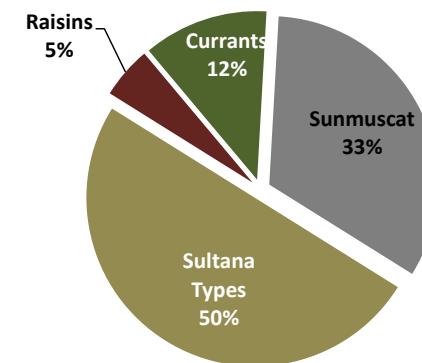
These dried grapes accounted for **50%** of production.

**Sunmuscat** accounted for **33%** of production.

**Currants** and **raisins** are the alternative varieties of dried grapes grown in Australia and accounted for **17%** of production.

## Dried Grapes

2020/21 Main Dried Grape Varieties

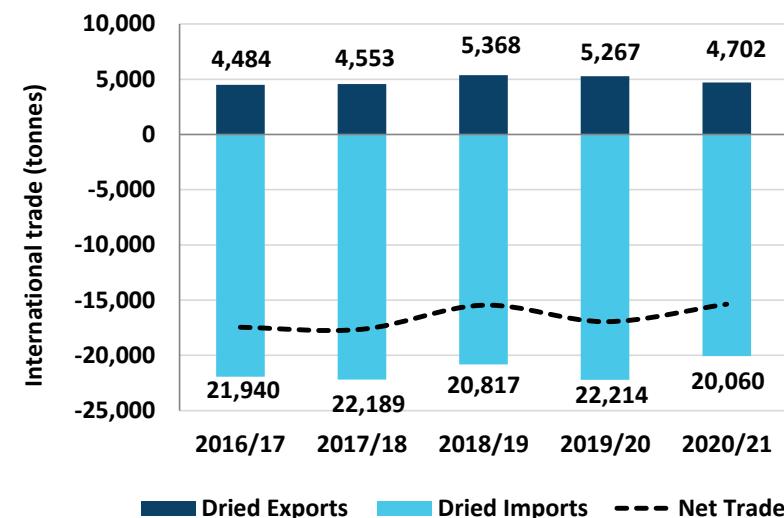


Source: DFA

## Processed Dried Grapes International Trade

For the year ending June 2021, Australia imported **20,060 tonnes** of dried grapes.

The exports and imports of dried grapes over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



## Prunes

### Prunes Overview

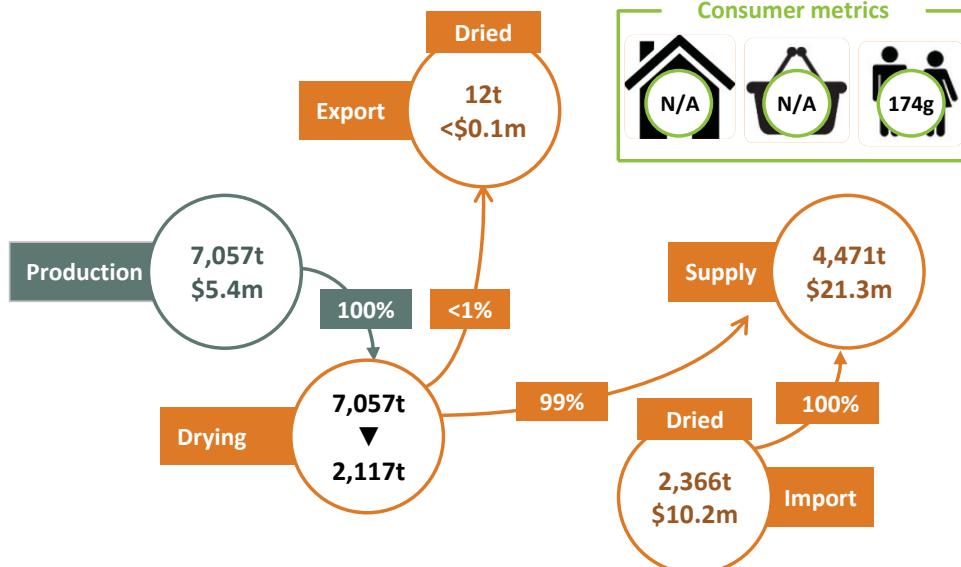
Plums grown for drying are predominantly grown in New South Wales and Victoria, with **Griffith** being the major producing area.

For the year ending June 2021:

- **7,057 t** of fresh plums were produced for drying, which after drying accounted for **2,117 tonnes** of prunes.
- The value of production of the fresh plums grown for drying was **\$5.4 m**, while the wholesale value of the dried supply was **\$21.3 m**.
- The dried supply per capita was **174 g**, based on the volume supplied.



### Prunes Supply Chain—Year Ending June 2021



Sources: AC; CFVWA; Dried Fruits Australia (DFA); GTA; MP & DD (Freshlogic Analysis)

## Prunes



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	2,095	2,632	+26%	2,117	-20%
Production (\$m)	\$ 6.3	\$ 5.8	-8%	\$ 5.4	-8%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	129	250	+95%	12	-95%
Dried Export Value (\$m)	\$ 0.4	\$ 0.6	+36%	< \$0.1	-87%
Dried Import Volume (t)	2,611	2,318	-11%	2,366	+2%
Dried Import Value (\$m)	\$ 12.7	\$ 11.7	-8%	\$ 10.2	-12%
Dried Supply (t)	4,577	4,699	+3%	4,471	-5%
Dried Supply Wholesale Value (\$m)	\$ 24.5	\$ 26.1	+6%	\$ 21.3	-18%
Supply per Capita (kg)	0.18	0.18	<1%	0.17	-5%

Sources: AC; CFVWA; DFA; GTA; MP & DD (Freshlogic Analysis)

### Major Prunes Production Areas

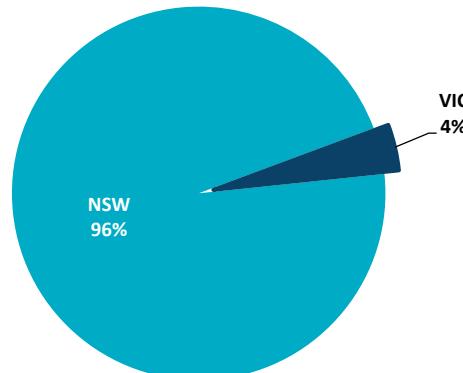


Source: DFA



## Prunes

2020/21 Prunes Production by State



Source: DFA

Prunes Production Seasonality by State

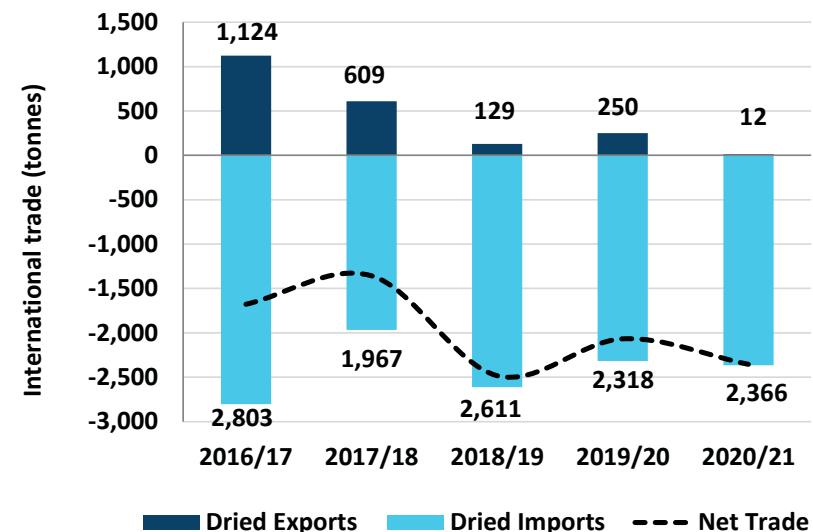
State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	6,774												
Victoria	282												
Fresh production legend		High	Medium	Low									

Source: DFA

## Prunes

### Prunes International Trade

For the year ending June 2021, Australia imported **2,366 tonnes** and exported **12 tonnes** of prunes. The exports and imports of prunes over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA





## Other Dried Tree Fruit

### Dried Tree Fruit Overview

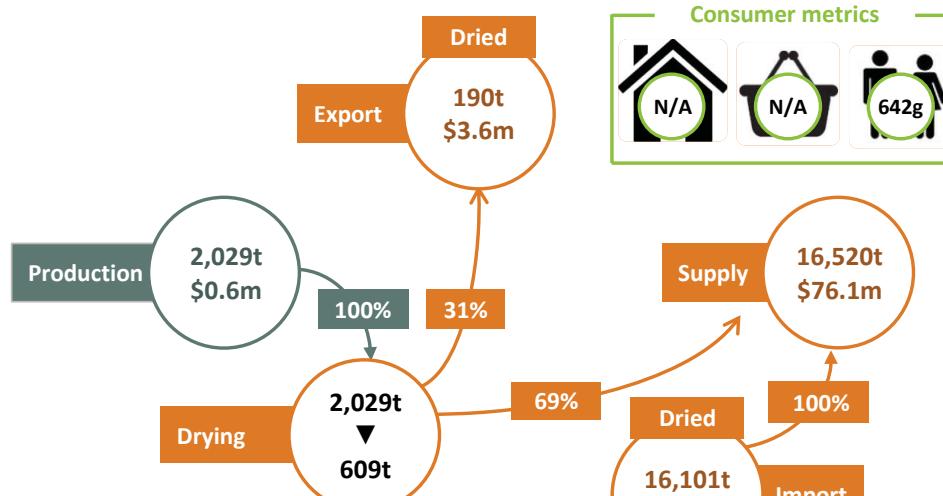
Dried Tree Fruits other than plums are a combination of dried fruits from different categories, predominantly summerfruit. The majority of the fruit grown for this category are from **Riverland**, **Sunraysia** and **Goulburn Valley** regions.

For the year ending June 2021:

- **2,029 t** of fresh tree fruit were produced for drying, which after drying accounted for **609 tonnes** of dried tree fruit.
- The value of production of the fresh tree fruit grown for drying was **\$0.6 m**, while the wholesale value of the dried supply was **\$76.1 m**.
- The dried supply per capita was **642 g**, based on the volume supplied.



### Dried Tree Fruit Supply Chain—Year Ending June 2021



Sources: AC; CFVWA; Dried Fruits Australia (DFA); GTA; MP & DD (Freshlogic Analysis)

## Other Dried Tree Fruit



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	517	647	+25%	609	-6%
Production (\$m)	\$ 0.6	\$ 0.7	+16%	\$ 0.6	-19%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	271	177	-34%	190	+7%
Dried Export Value (\$m)	\$ 4.3	\$ 3.7	-13%	\$ 3.6	-3%
Dried Import Volume (t)	15,713	16,483	+5%	16,101	-2%
Dried Import Value (\$m)	\$ 66.0	\$ 73.8	+12%	\$ 68.9	-7%
Dried Supply (t)	15,959	16,952	+6%	16,520	-3%
Dried Supply Wholesale Value (\$m)	\$ 69.5	\$ 82.6	+19%	\$ 76.1	-8%
Supply per Capita (kg)	0.63	0.66	+4%	0.64	-2%

Sources: AC; CFVWA; DFA; GTA; MP & DD (Freshlogic Analysis)

### Major Dried Tree Fruit Production Areas

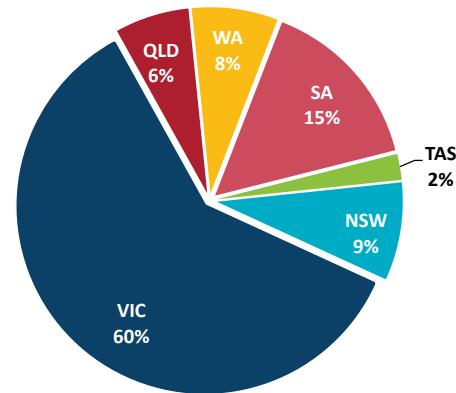


Source: DFA



## Other Dried Tree Fruit

2020/21 Dried Tree Fruit Production by State



Source: DFA

Fresh Tree Fruit Production for drying—Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	173												
Victoria	1,219												
Queensland	131												
Western Australia	152												
South Australia	308												
Tasmania	46												
Fresh production legend		High	Medium	Low									

Source: DFA

## Main Dried Tree Fruit Varieties

There are a number of categories of tree fruits grown for drying in Australia, and can be broadly grouped into main types. These are:

**Apricots** accounted for 34% of production.

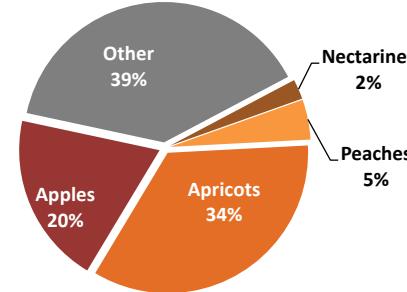
**Apples** grown for drying accounted for 20% of production.

**Nectarines** and **Peaches** accounted for 7% of production.

**Other** fruits grown for drying, including pineapples, mandarins and pears, accounted for 39% of production.

## Other Dried Tree Fruit

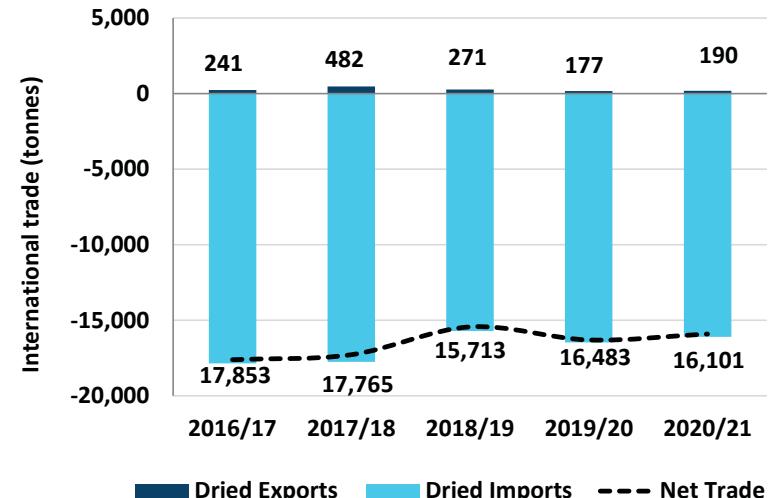
2020/21 Main Dried Tree Fruit Varieties



Sources: GTA; DFA

## Processed Dried Tree Fruit International Trade

For the year ending June 2021, Australia imported **16,101 tonnes** of dried tree fruit. The exports and imports of dried fruit over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA





# Canned Fruit

## Canned Fruit Overview

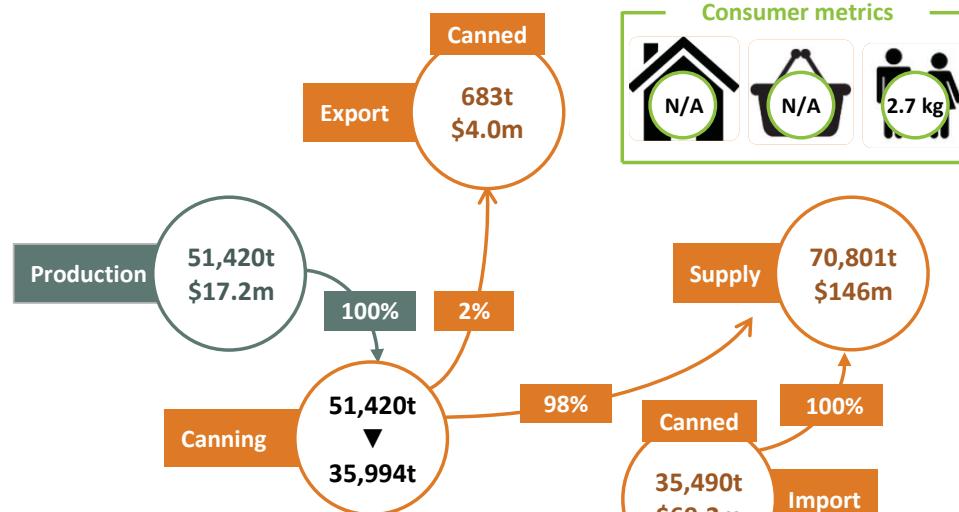
Canned Fruit is a combination of fruits from different categories, predominantly pineapples, peaches and pears. The majority of the fruit grown for this category are found around Australia typically within close proximity to canning processors.

For the year ending June 2021:

- **51,420 t** of fresh fruit was produced for canning.
- The value of production of the fresh fruit grown for canning was **\$17.2 m**, while the wholesale value of the canned supply was **\$145.7 m**.
- The supply per capita was **2.7 kg**, based on the volume supplied.



## Canned Fruit Supply Chain—Year Ending June 2021



Sources: AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

# Canned Fruit



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Canned Production (t)	39,791	36,279	-9%	35,994	>1%
Production (\$m)	\$ 19.3	\$ 18.4	-5%	\$ 17.2	-7%
Production area (Ha)	-	-	-	-	-
Canned Export Volume (t)	1,310	1,617	+23%	683	-58%
Canned Export Value (\$m)	\$ 9.2	\$ 6.4	-31%	\$ 4.0	-37%
Canned Import Volume (t)	33,137	34,252	+3%	35,490	+4%
Canned Import Value (\$m)	\$ 57.7	\$ 65.6	+14%	\$ 69.2	+6%
Canned Supply (t)	71,618	68,913	-4%	70,801	+3%
Supply Wholesale Value (\$m)	\$ 175.8	\$ 94.8	-46%	\$ 145.7	+54%
Supply per Capita (kg)	2.84	2.67	-6%	2.75	+3%

Sources: AC; CFVWA; GTA; MP & DD (Freshlogic Analysis)

## Major Canned Fruit Production Areas

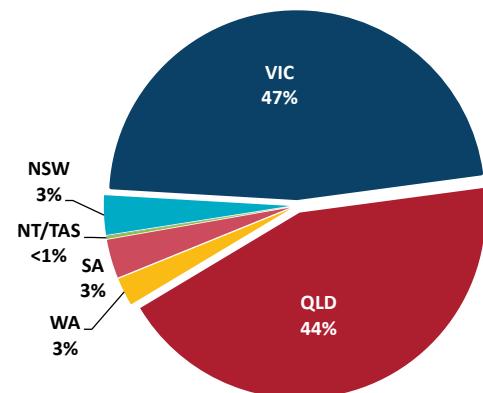


Source: (Freshlogic Analysis)



## Canned Fruit

2019/21 Canned Fruit Production by State



Source: (Freshlogic Analysis)

### Fresh Fruit Production for Canning—Seasonality by State

State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,763												
Victoria	24,141												
Queensland	22,385												
Western Australia	1,257												
South Australia	1,736												
Tasmania	108												
Northern Territory	30												
Availability legend		High	Medium	Low									

Source: (Freshlogic Analysis)

## Main Canned Fruit Products

There are a number of categories of tree fruits grown for canning in Australia and consists mainly of 3 main types for the year ending 2019. These include:

Pineapples account for 35% of canned fruit processing for the year.

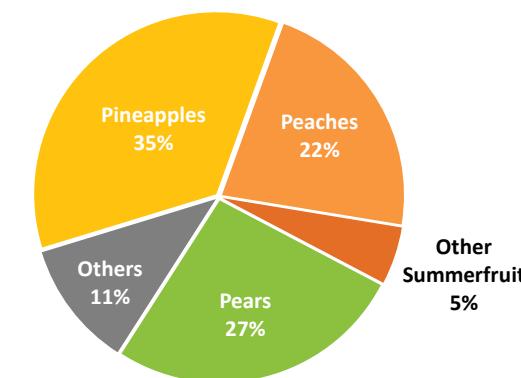
Summerfruit including peaches, apricots, and plums from the Goulburn region accounted for 27% of canned fruit production.

Pears account for 26% of the fruit grown for canning in Australia.

Other fruit account for 11% of the remaining canned fruit.

## Canned Fruit

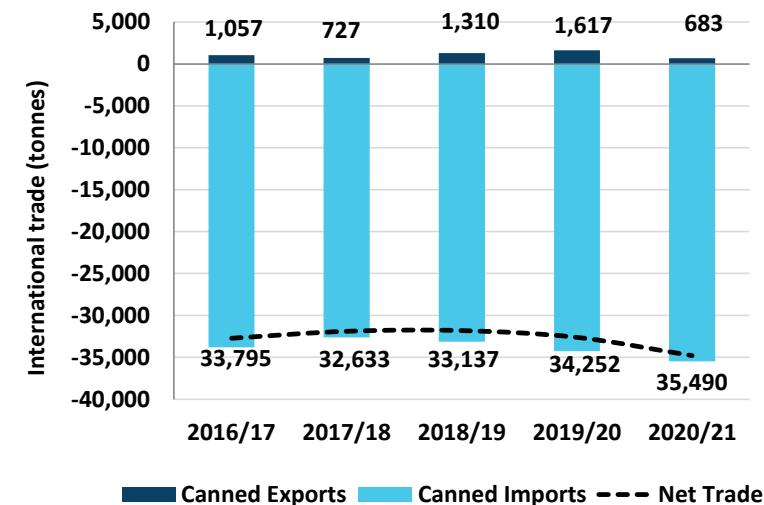
2019/20 Main Canned Fruit Products



Source: (Freshlogic Analysis)

## Processed Canned Fruit International Trade

For the year ending June 2021, Australia imported 35,490 tonnes of canned fruit. The exports and imports of canned fruit over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA





# Olives

## Olives Overview

Olives are grown in many states of Australia, with the majority of production being grown in Victoria. Almost all olives grown in Australia are grown for the production of olive oil, with some grown for use as table olives. Both forms are profiled below.

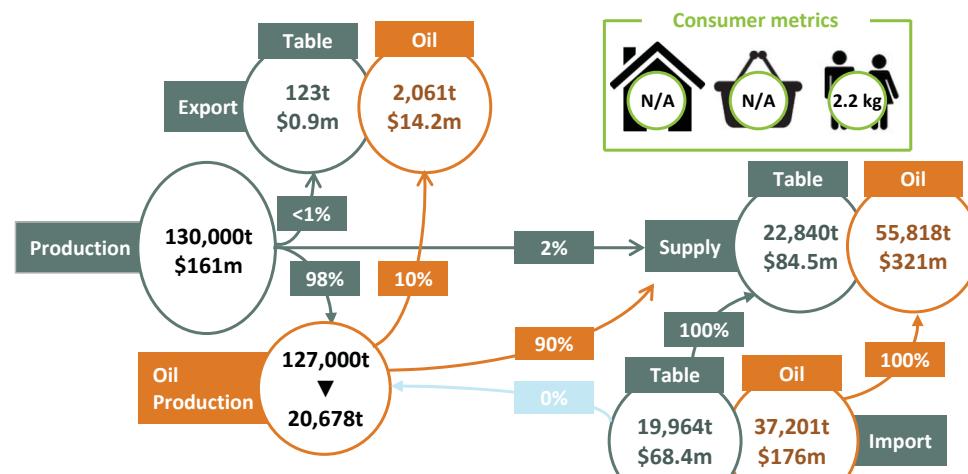
For the year ending June 2021:

- **130,000 t** of fresh olives were produced, **99%** or **127,000 t** of which were extracted for oil, producing **20,678 tonnes** equivalent to **22.8 million litres** of olive oil.
- The value of production of olives was **\$161.2 m**, while the wholesale value of the oil supply was **\$320.6 m**.
- The consumption of olive oil per capita was **2.17 kg**, based on the volume supplied.



## Olive Oil/Table Olive Supply Chain—Year Ending June 2021

Sources: Australian Olive Association (AOA); GTA; MP & DD (Freshlogic Analysis)



# Olives



Year Ending June	2019	2020		2021	
	Value	Value	% YoY	Value	% YoY
Production (t)	125,000	50,000	-60%	130,000	>100%
Production (\$m)	\$ 155.0	\$ 62.0	-60%	\$ 161.2	>100%
Production area (Ha)	20,568	20,568	-	21,250	+3%
Olive Oil Export Volume (t)	2,304	2,681	+16%	2,061	-23%
Olive Oil Export Value (\$m)	\$ 16.1	\$ 18.8	+17%	\$ 14.2	-25%
Olive Oil Import Volume (t)	33,274	36,467	+10%	37,201	+2%
Olive Oil Import Value (\$m)	\$ 185.0	\$ 181.8	-2%	\$ 175.8	-3%
Olive Oil Supply (t)	50,707	42,448	-16%	55,818	+31%
Olive Oil Wholesale Value (\$m)	\$ 324.3	\$ 224.6	-31%	\$ 320.6	+43%
Oil Consumption per Capita (kg)	2.01	1.65	-18%	2.17	+32%

Sources: AOA; GTA; MP & DD (Freshlogic Analysis)

## Major Olive Production Areas

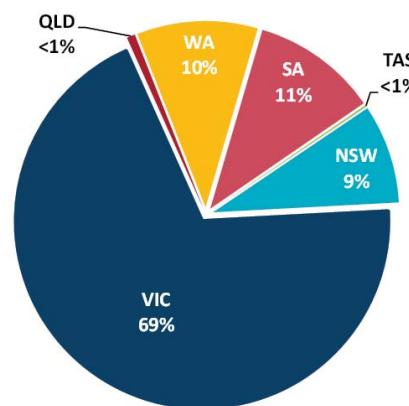


Source: AOA



## Olives

### 2020/21 Olives Production by State



Source: AOA

### Fresh Olive Production —Seasonality by State

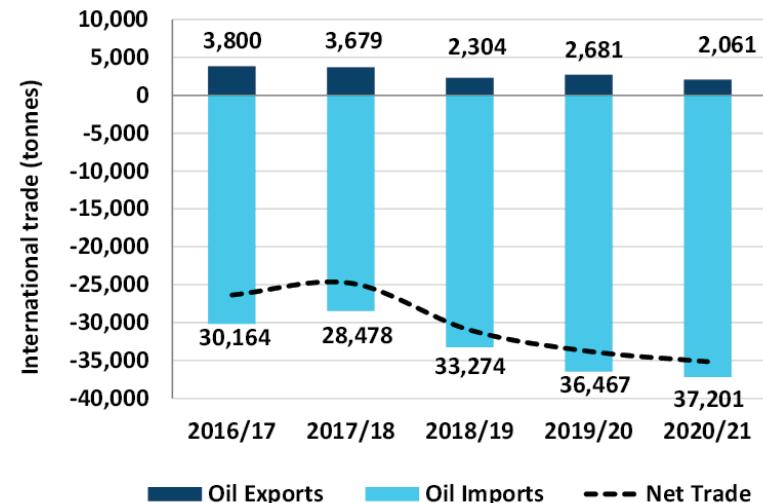
State	20/21 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	11,180												
Victoria	89,895		High										
Queensland	936									Medium	Low		
Western Australia	13,650									Medium	Low		
South Australia	14,170									Medium	Low		
Tasmania	169	High	Medium	Low									
Availability legend		High	Medium	Low									

Source: AOA

## Olives

### Olive Oil International Trade

For the year ending June 2021, Australia imported **37,201 tonnes** of olive oil (**this number does not include table olives**). The exports and imports of olive oil over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

