**Australian Horticulture Statistics Handbook** 2021/22

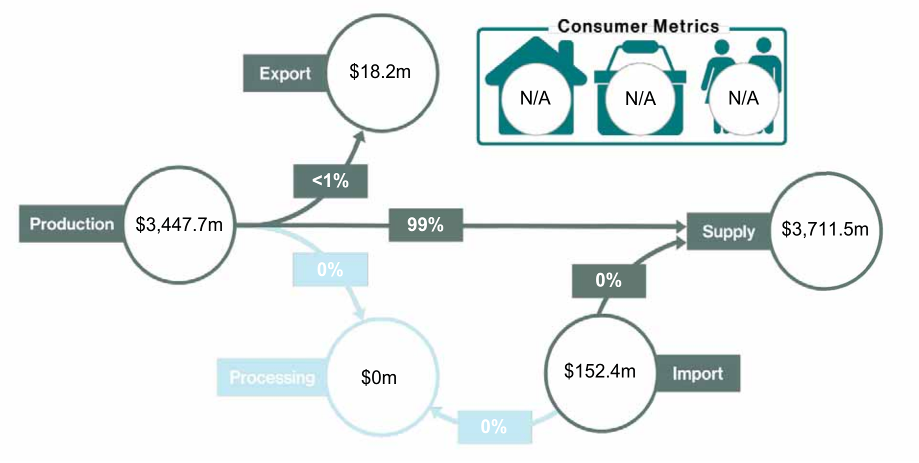
Hort Innovation

freshlogic

# All Other Horticulture

# All Other Horticulture Overview

## ALL FRESH OTHER HORTICULTURE SUPPLY CHAIN – YEAR ENDING JUNE 2022




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

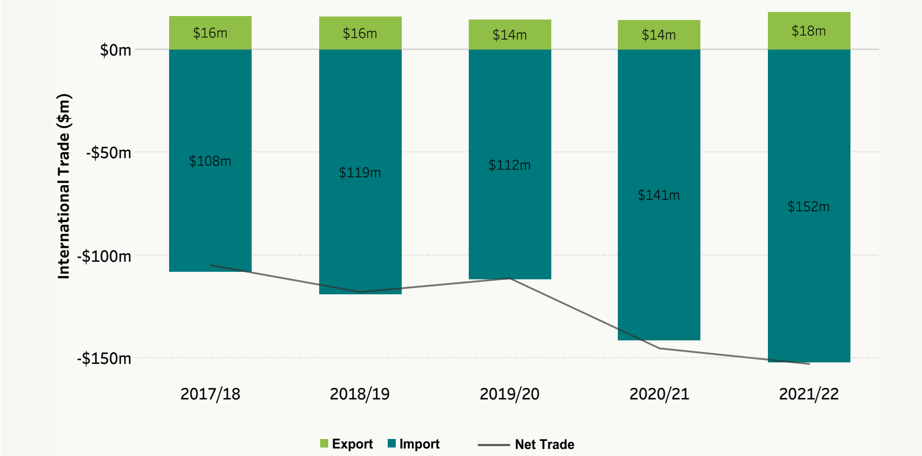
## TOTAL PRODUCTION:

**$3.45B**

The value of production was **$3.45B** while the wholesale value of the fresh supply was **$3.71B**.

| YEAR ENDING JUNE | 2020 | 2021 | | 2022 | |
|---|---|---|---|---|---|
| | Value | Value | %YoY | Value | %YoY |
| Production ($m) | $3,136.2 | $3,374.8 | +8% | $3,447.7 | +2% |
| Fresh Export Value ($m) | $14.3 | $13.9 | -3% | $18.2 | +31% |
| Fresh Import Value ($m) | $112.0 | $141.5 | +26% | $152.4 | +8% |
| Fresh Supply Wholesale Value ($m) | $3,351.2 | $3,617.1 | +8% | $3,711.5 | +3% |

## ALL OTHER FRESH HORTICULTURE INTERNATIONAL TRADE





Version 1.2 (May 2023)

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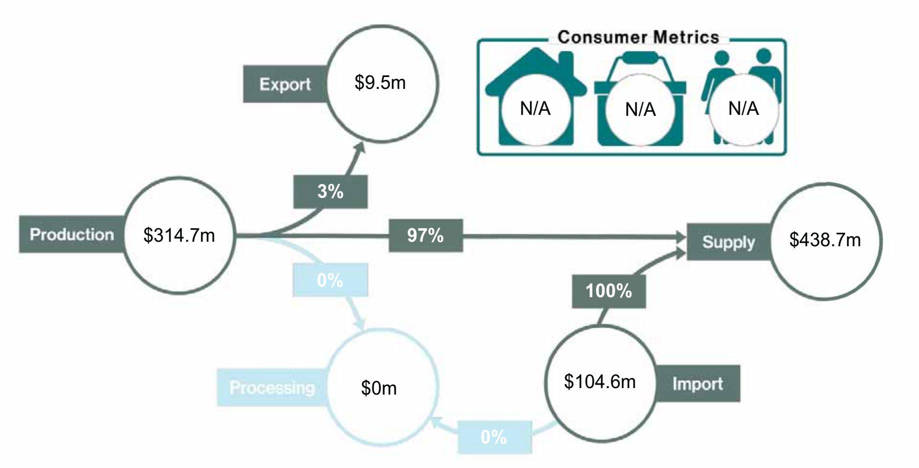
# Cut Flowers

# Cut Flowers Overview

## CUT FLOWERS SUPPLY CHAIN – YEAR ENDING JUNE 2022

Note : Cut flowers have been represented in the supply chain below by their value rather than volume due to inconsistencies in the unit by which volume of production is measured.



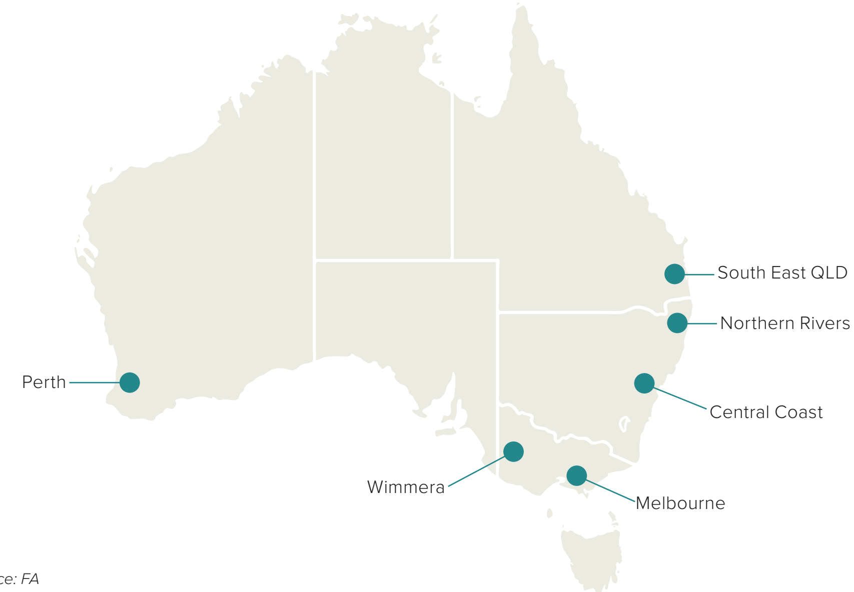

*Sources: ABS; AC; CFVIWA; Flowers Association (FA); GTA; (Freshlogic Analysis)*

| YEAR ENDING JUNE | 2020 | 2021 | | 2022 | |
|---|---|---|---|---|---|
| | Value | Value | %YoY | Value | %YoY |
| Production ($m) | $293.0 | $277.3 | -5% | $314.7 | +14% |
| Fresh Export Value ($m) | $8.4 | $7.9 | -6% | $9.5 | +21% |
| Fresh Import Value ($m) | $74.2 | $95.4 | +29% | $104.6 | +10% |
| Fresh Supply Wholesale Value ($m) | $385.3 | $380.5 | -1% | $438.7 | +15% |

*Sources: ABS; AC; CFVIWA; Flowers Association (FA); GTA; (Freshlogic Analysis)*

# Cut Flowers Production

## MAJOR PRODUCTION AREAS



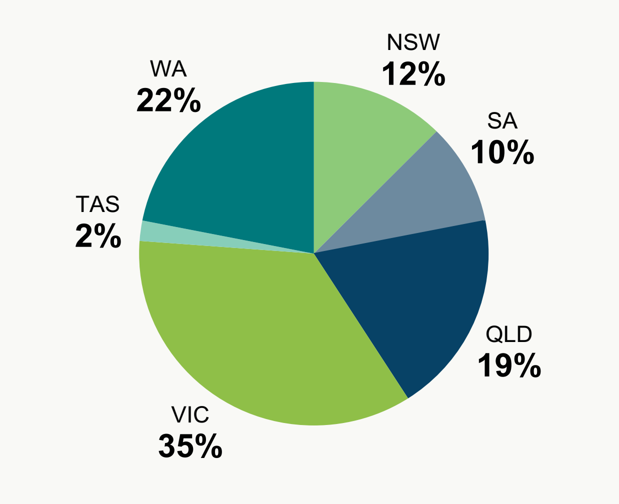

*Source: FA*

Cut flowers are grown year round in Australia, with peaks in Febuary for Valentines' day, May for Mothers' Day, and smaller peak in December for Christmas. Production occurs in high tech glasshouses, lower tech protected cropping, as well as in outdoor fields. The majority of cut flowers grown in Australia are grown in Victoria.

## PRODUCTION WINDOW:

**Year-round**

## 2021/22 CUT FLOWERS PRODUCTION BY STATE




*Source: FA*

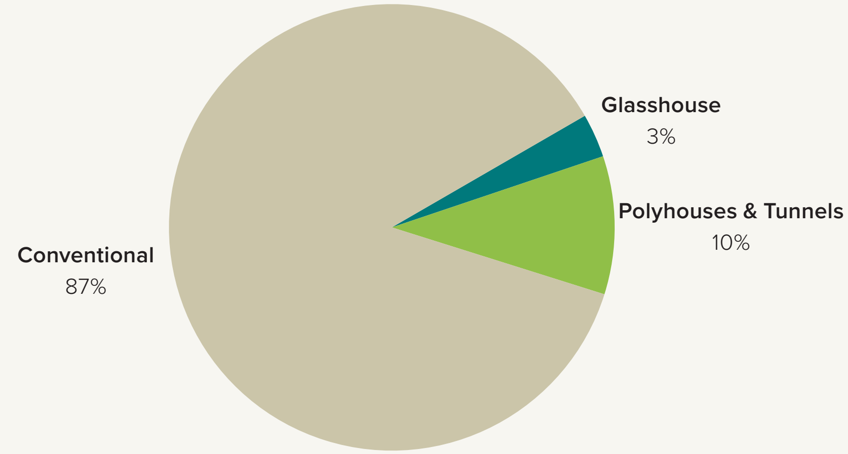
## 2021/22 CUT FLOWERS SEASONALITY BY STATE

| State | Value ($m) | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Victoria | $110.9 | Low | Low | Low | Low | Low | Medium | Low | High | Low | Low | High | Low |
| Western Australia | $68.9 | Low | Low | Low | Low | Low | Medium | Low | High | Low | Low | High | Low |
| Queensland | $59.9 | Low | Low | Low | Low | Low | Medium | Low | High | Low | Low | High | Low |
| New South Wales | $39.0 | Low | Low | Low | Low | Low | Medium | Low | High | Low | Low | High | Low |
| South Australia | $30.0 | Low | Low | Low | Low | Low | Medium | Low | High | Low | Low | High | Low |
| Tasmania | $6.0 | Low | Low | Low | Low | Low | Medium | Low | High | Low | Low | High | Low |

Availability legend: High Medium Low None

*Source: FA*

## 2021/22 FRESH CUT FLOWERS PRODUCTION BY SYSTEM




Production of cut flowers in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 3%**, **Polyhouses & Tunnels 10%** and **Conventional 87%**.

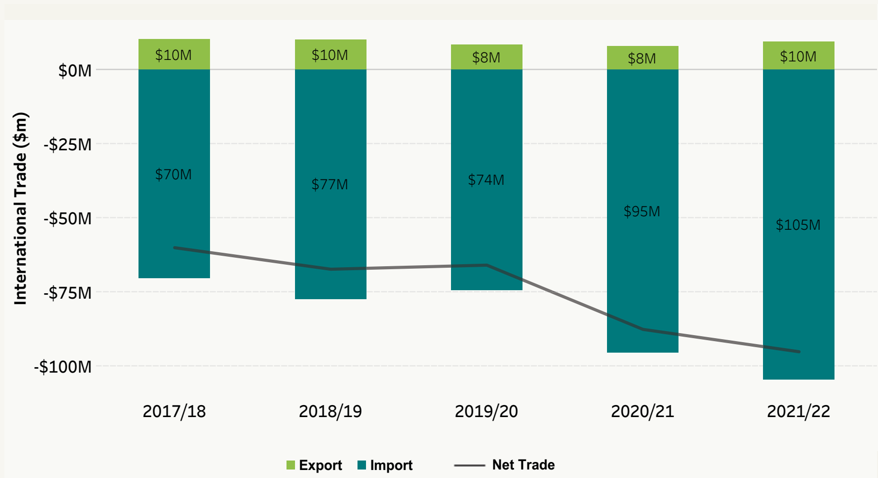
## 2021/22 FRESH CUT FLOWERS PRODUCTION SYSTEM BY STATE

| | Glasshouse | | | Polyhouses & Tunnels | | | Conventional | | |
|---|---|---|---|---|---|---|---|---|---|
| State | Hectares (Ha) | Volume (t) | Value ($m) | Hectares (Ha) | Volume (t) | Value ($m) | Hectares (Ha) | Volume (t) | Value ($m) |
| New South Wales | 3 | - | $1.2 | 10 | - | $3.9 | 105 | - | $33.8 |
| Victoria | 7 | - | $3.5 | 30 | - | $11.1 | 299 | - | $96.3 |
| Queensland | 4 | - | $1.9 | 16 | - | $6.0 | 162 | - | $52.0 |
| Western Australia | 5 | - | $2.2 | 18 | - | $6.9 | 186 | - | $59.9 |
| South Australia | 2 | - | $0.95 | 8 | - | $3.0 | 81 | - | $26.0 |
| Tasmania | 0.4 | - | $0.2 | 2 | - | $0.6 | 16 | - | $5.2 |
| Northern Territory | 0 | - | $- | 0 | - | $- | 0 | - | $- |

# Cut Flowers International Trade

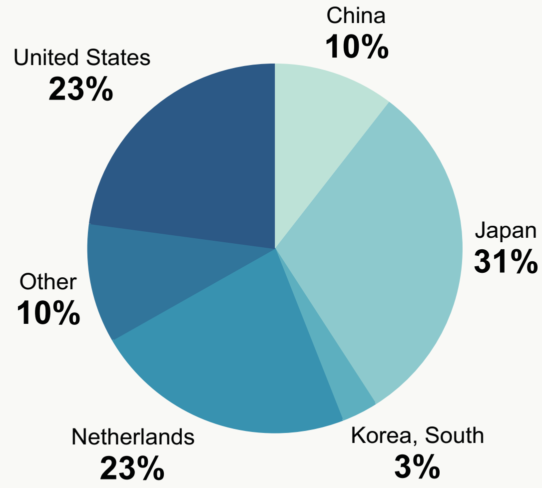
## CUT FLOWERS INTERNATIONAL TRADE

Australia is a net importer of fresh cut flowers. International trade has been presented in terms of value rather than volume, due to inconsistencies in the way trade volume data is recorded. For the year ending June 2022, Australia exported **$9.5 million**, and imported **$104.6 million** worth of cut flowers. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative million dollars.




Sources: GTA

## 2021/22 CUT FLOWERS EXPORTS BY COUNTRY




Source: GTA

For the year ending June 2022, **31%** of the value of cut flowers were sent to **Japan**, as profiled in the chart above.

## CUT FLOWERS IMPORTS AND EXPORTS BY STATE

| Imports by State Destination ($m) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| New South Wales | $27.4 | $35.5 | $37.8 |
| Victoria | $24.8 | $26.1 | $32.1 |
| Western Australia | $10.3 | $20.6 | $24.1 |
| Queensland | $8.0 | $8.9 | $5.8 |
| South Australia | $3.6 | $4.2 | $4.9 |
| TOTAL | $74.2 | $95.4 | $104.6 |

| Exports by State of Production Origin ($m) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| Queensland | $3.0 | $2.8 | $4.0 |
| Western Australia | $3.5 | $3.3 | $3.7 |
| Victoria | $1.7 | $1.6 | $1.7 |
| New South Wales | $0.1 | $0.2 | $0.1 |
| TOTAL | $8.4 | $7.9 | $9.5 |

## CUT FLOWERS IMPORTS AND EXPORTS BY COUNTRY

| Imports by Country ($m) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| China | $7.7 | $21.2 | $21.8 |
| Malaysia | $14.6 | $18.8 | $28.6 |
| Kenya | $15.8 | $14.1 | $17.4 |
| Ecuador | $10.8 | $12.4 | $13.8 |
| Colombia | $9.2 | $9.5 | $9.0 |
| Other | $16.0 | $19.4 | $14.0 |
| TOTAL | $74.2 | $95.4 | $104.6 |

| Exports by Country ($m) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| Japan | $2.8 | $2.7 | $2.9 |
| United States | $1.3 | $1.2 | $2.2 |
| Netherlands | $2.0 | $1.6 | $2.2 |
| China | $1.2 | $1.2 | $1.0 |
| Korea, South | $0.3 | $0.3 | $0.3 |
| Other | $0.7 | $0.9 | $1.0 |
| TOTAL | $8.4 | $7.9 | $9.5 |

Source: GTA

# Australian Horticulture Statistics Handbook 2021/22

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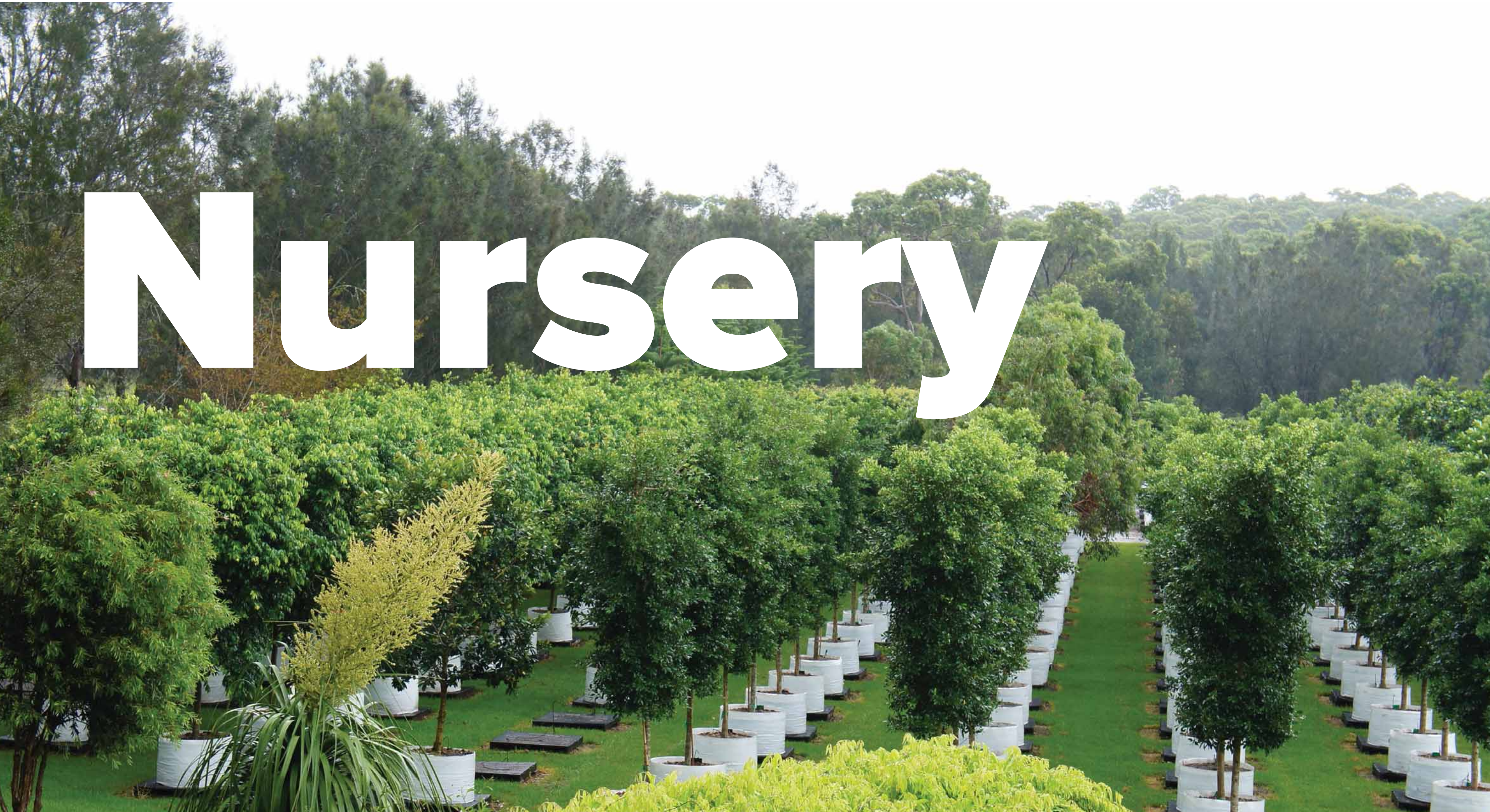
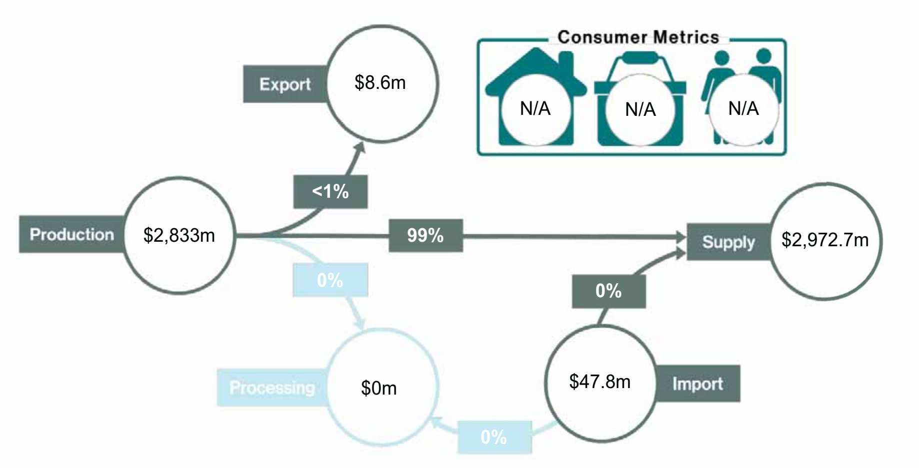
# Nursery



# Nursery Overview

## NURSERY SUPPLY CHAIN – YEAR ENDING JUNE 2022

Note : Production value for nursery has been measured outside of THRU Chain methodology, based directly on project output from **NY21000**.



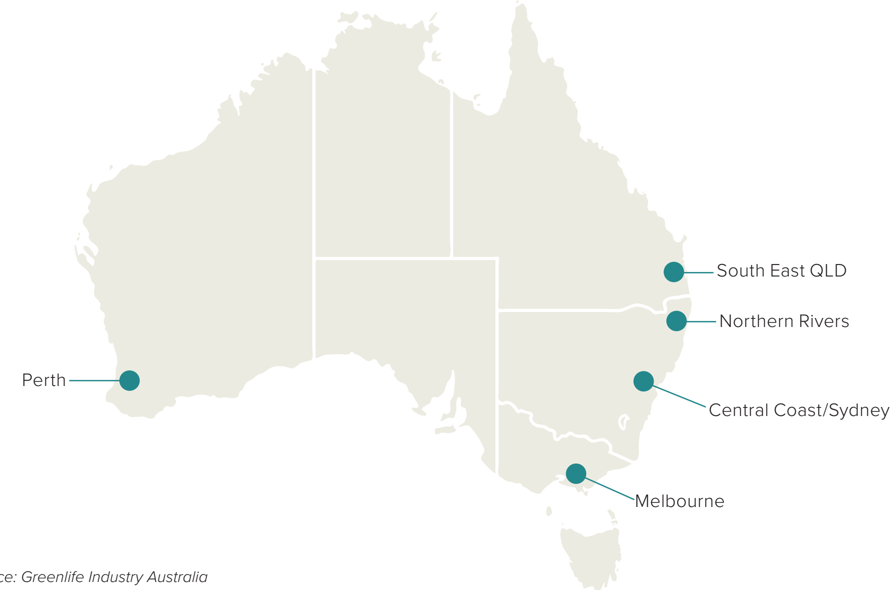

*Sources: ABS; GTA; Hort Innovation; Greenlife Industry Australia*

| YEAR ENDING JUNE | 2020 | 2021 | | 2022 | |
|---|---|---|---|---|---|
| | Value | Value | %YoY | Value | %YoY |
| Production (m units) | 2,100 | 2,324 | +11% | 2,334 | <1% |
| Production ($m) | $2,563.0 | $2,789.5 | +9% | $2,833.0 | +2% |
| Export Value ($m) | $5.9 | $6.0 | +1% | $8.6 | +44% |
| Import Value ($m) | $37.8 | $46.1 | +22% | $47.8 | +4% |
| Supply Wholesale Value ($m) | $2,685.7 | $2,928.6 | +9% | $2,972.7 | +2% |

*Sources: ABS 8501.0 Retail Trade; GTA; Hort Innovation; Greenlife Industry Australia*

# Nursery Production

## MAJOR PRODUCTION AREAS



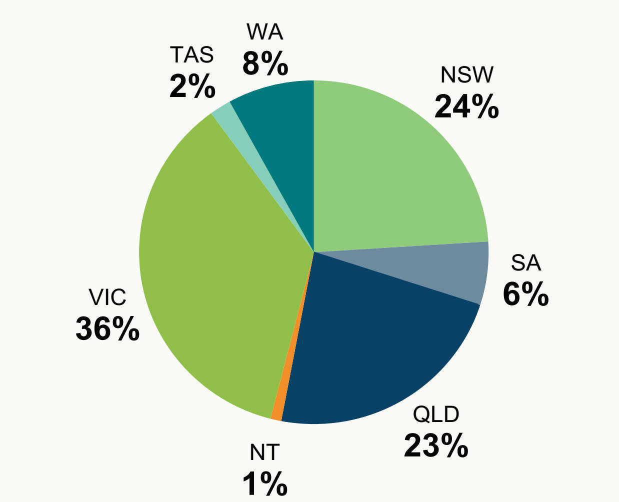

*Source: Greenlife Industry Australia*

Nursery covers live plants grown for a range of uses that include; landscaping, revegetation and distribution of ornamental retail supply chain, plus as starter plants in the commercial production of fruit, vegetables and forestry. Nursery production occurs in all states and territories of Australia, with majority of production occurring in Victoria, Queensland and New South Wales. Production occurs year-round, with peaks selling during the spring season for ornamental retail product lines.

## PRODUCTION WINDOW:

**Year-round**

## 2021/22 NURSERY PRODUCTION BY STATE




*Source: ABS*

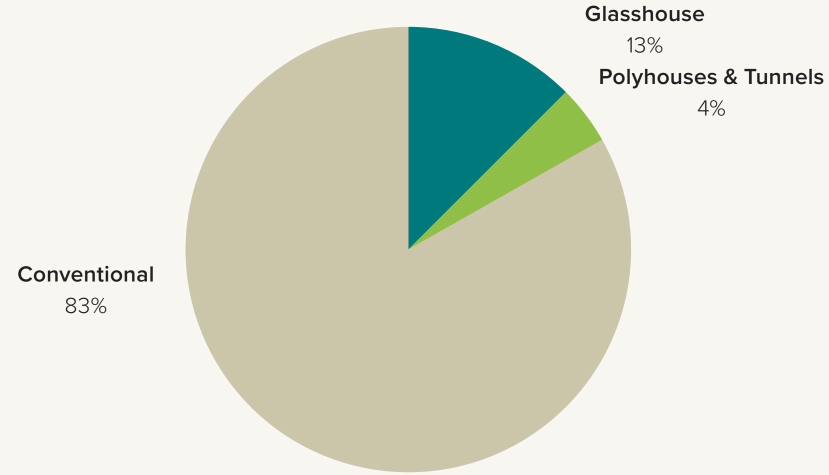
## 2021/22 NURSERY SEASONALITY BY STATE

| State | Value ($m) | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Victoria | $1,019.9 | | | | | | | | | | | | |
| New South Wales | $679.9 | | | | | | | | | | | | |
| Queensland | $651.6 | | | | | | | | | | | | |
| Western Australia | $226.6 | | | | | | | | | | | | |
| South Australia | $170.0 | | | | | | | | | | | | |
| Tasmania | $56.7 | | | | | | | | | | | | |
| Northern Territory | $28.3 | | | | | | | | | | | | |

Availability legend: High Medium Low None

*Source: ABS*

## 2021/22 NURSERY PRODUCTION BY SYSTEM




Production of nursery in Australia occurs in three different types of farming systems. These systems and their contribution to the value of production are **Glasshouse 13%**, **Polyhouses & Tunnels 4%** and **Conventional 83%**.

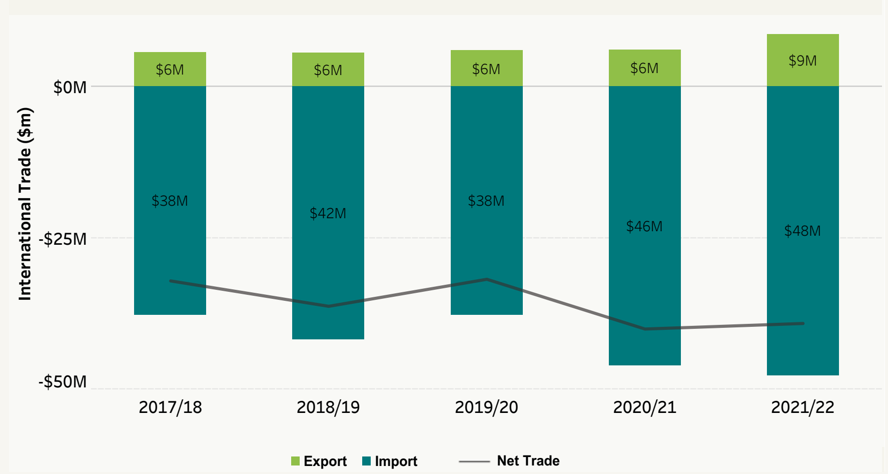
## 2021/22 NURSERY PRODUCTION SYSTEM BY STATE

| | Glasshouse | | | Polyhouses & Tunnels | | | Conventional | | |
|---|---|---|---|---|---|---|---|---|---|
| State | Hectares (Ha) | Volume (t) | Value ($m) | Hectares (Ha) | Volume (t) | Value ($m) | Hectares (Ha) | Volume (t) | Value ($m) |
| New South Wales | 192 | - | $85.0 | 111 | | $29.2 | 1529 | | $565.7 |
| Victoria | 289 | - | $127.5 | 167 | | $43.8 | 2293 | | $848.5 |
| Queensland | 184 | - | $81.5 | 106 | | $28.0 | 1465 | | $542.1 |
| Western Australia | 64 | - | $28.3 | 37 | | $9.7 | 510 | | $188.6 |
| South Australia | 48 | - | $21.3 | 28 | | $7.3 | 382 | | $141.4 |
| Tasmania | 16 | - | $7.1 | 9 | | $2.4 | 127 | | $47.1 |
| Northern Territory | 8 | - | $3.5 | 5 | | $1.2 | 64 | | $23.6 |

# Nursery International Trade

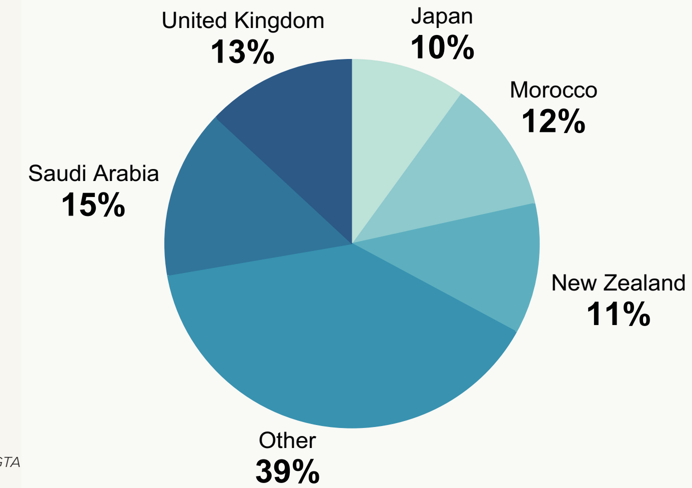
## NURSERY INTERNATIONAL TRADE

Australia is a net importer of nursery products. International trade has been presented in terms of value rather than volume, due to the way trade data is recorded. For the year ending 2022, Australia exported **$8.6 million** worth, and imported **$47.8 million** worth. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative dollars.




Sources: GTA

## 2021/22 NURSERY EXPORTS BY COUNTRY




Source: GTA

For the year ending June 2022, **15%** of the value of nursery plants were sent to **Saudi Arabia**, as profiled in the chart above.

## NURSERY IMPORTS AND EXPORTS BY STATE

| Imports by State Destination (Tonnes) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| Victoria | $23.5 | $26.7 | $29.0 |
| Queensland | $7.1 | $10.8 | $10.0 |
| New South Wales | $3.7 | $4.0 | $4.5 |
| Western Australia | $1.9 | $2.6 | $2.6 |
| South Australia | $1.1 | $1.1 | $1.2 |
| Other | $0.5 | $0.7 | $0.6 |
| TOTAL | $37.8 | $46.1 | $47.8 |

| Exports by State of Production Origin (Tonnes) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| New South Wales | $1.6 | $1.8 | $2.7 |
| Queensland | $1.5 | $1.6 | $1.9 |
| Victoria | $1.6 | $1.5 | $1.5 |
| Tasmania | $0.4 | $0.9 | $1.5 |
| Western Australia | $0.9 | $0.1 | $1.1 |
| TOTAL | $5.9 | $6.0 | $8.6 |

## NURSERY IMPORTS AND EXPORTS BY COUNTRY

| Imports by Country (Tonnes) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| Netherlands | $15.6 | $17.9 | $17.9 |
| Taiwan | $6.7 | $9.0 | $10.7 |
| China | $8.2 | $10.8 | $9.4 |
| New Zealand | $2.1 | $2.3 | $2.7 |
| India | $1.4 | $1.5 | $1.6 |
| Other | $3.6 | $4.5 | $5.5 |
| TOTAL | $37.8 | $46.1 | $47.8 |

| Exports by Country (Tonnes) | | | |
|---|---|---|---|
| Year Ending June | 2020 | 2021 | 2022 |
| Saudi Arabia | $- | $- | $1.3 |
| United Kingdom | $0.3 | $1.2 | $1.1 |
| New Zealand | $0.7 | $0.8 | $1.0 |
| Morocco | $0.1 | $0.2 | $1.0 |
| Japan | $0.3 | $0.4 | $0.9 |
| Other | $4.5 | $3.4 | $3.4 |
| TOTAL | $5.9 | $6.0 | $8.6 |

Source: GTA

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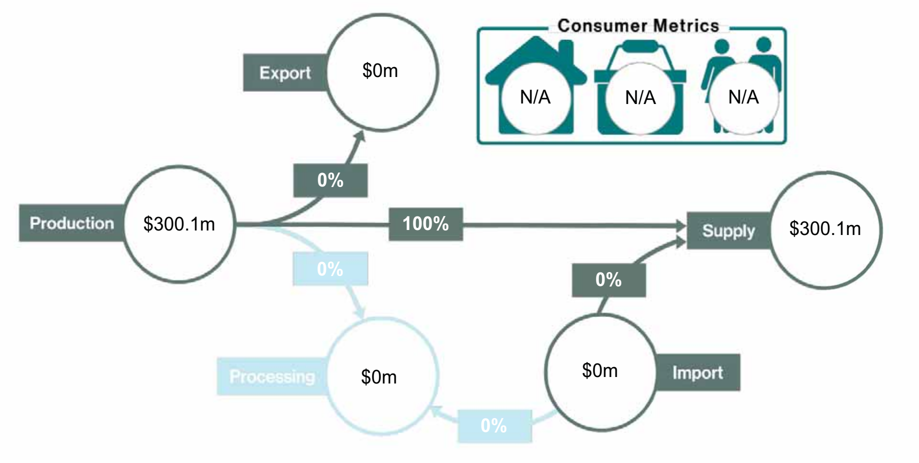
# Turf

# Turf Overview

## TURF SUPPLY CHAIN – YEAR ENDING JUNE 2022



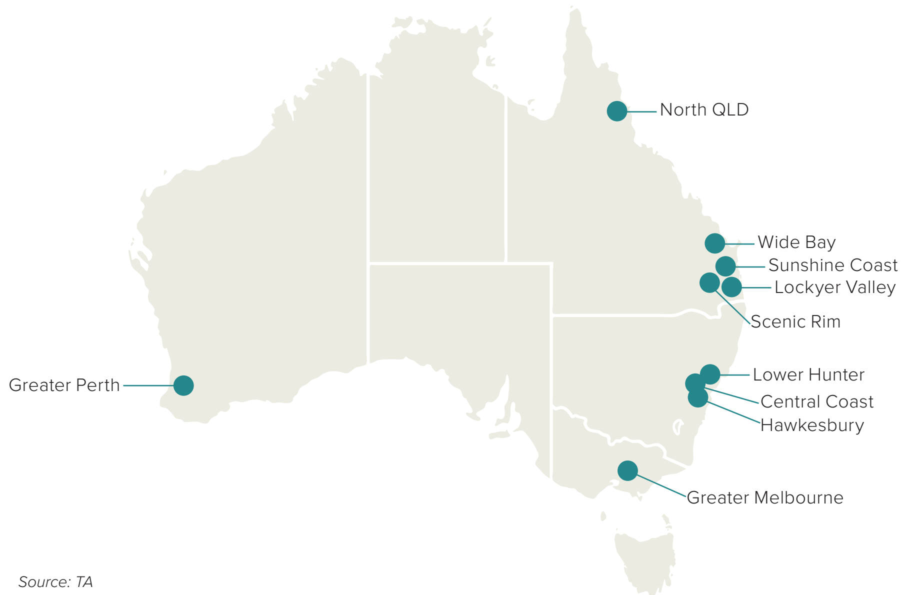

*Sources: AC; CFVIWA; GTA; Turf Australia (TA); (Freshlogic Analysis)*

| YEAR ENDING JUNE | 2020 | 2021 | | 2022 | |
|---|---|---|---|---|---|
| | Value | Value | %YoY | Value | %YoY |
| Production (m $m^2$) | 38 | 44 | +15% | 39 | -13% |
| Production ($m) | $280.2 | $308.0 | +10% | $300.1 | -3% |
| Production area (Ha) | 3,880 | 3,950 | +2% | 3,400 | -14% |
| Fresh Supply (m $m^2$) | 38 | 44 | +15% | 39 | -13% |
| Fresh Supply Wholesale Value ($m) | $280.2 | $308.0 | +10% | $300.1 | -3% |

*Sources: AC; CFVIWA; GTA; TA; (Freshlogic Analysis)*

# Turf Production

## MAJOR PRODUCTION AREAS



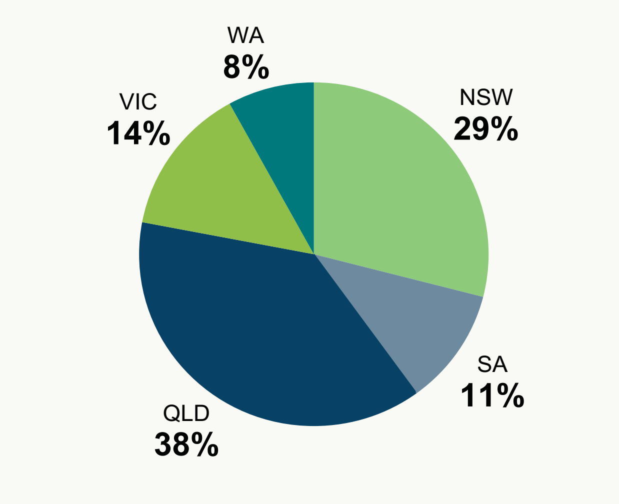

*Source: TA*

Turf covers live grass products grown for parks, gardens, residential and commercial properties, sporting venues and for land rehabilitation and landscape improvement purposes. Production occurs in all states and territories of Australia. The majority of production occurs in New South Wales and Queensland. Production is year-round, with a number of different varieties being grown, although there is a peak of production during the spring and summer months.

## PRODUCTION WINDOW:

**Year-round**

## 2021/22 TURF PRODUCTION BY STATE




*Source: TA*

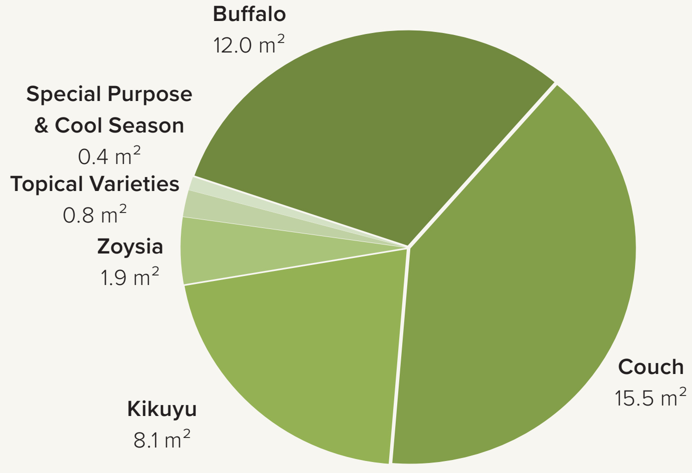
## 2021/22 TURF SEASONALITY BY STATE

| State | Value ($m) | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Queensland | $114.0 | | | | | | | | | | | | |
| New South Wales | $87.0 | | | | | | | | | | | | |
| Victoria | $42.0 | | | | | | | | | | | | |
| South Australia | $33.0 | | | | | | | | | | | | |
| Western Australia | $24.0 | | | | | | | | | | | | |

Availability legend: High Medium Low None

*Source: TA*

## 2021/22 TURF PRODUCTION BY VARIETY




*Source: TA*