

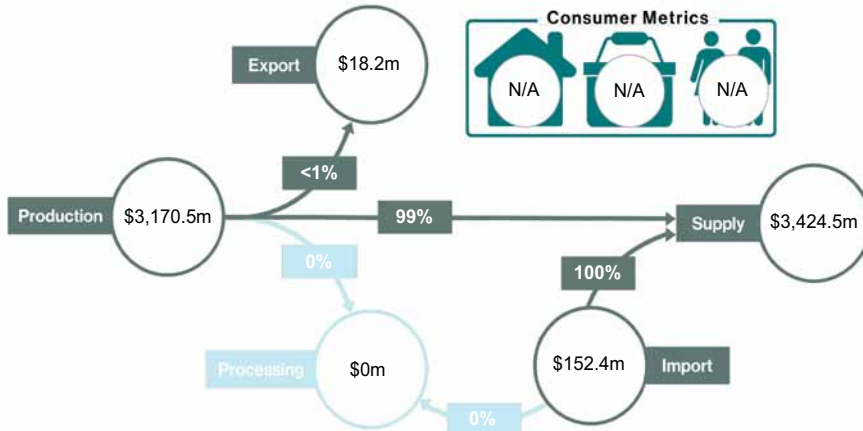


# All Other Horticulture



# 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:

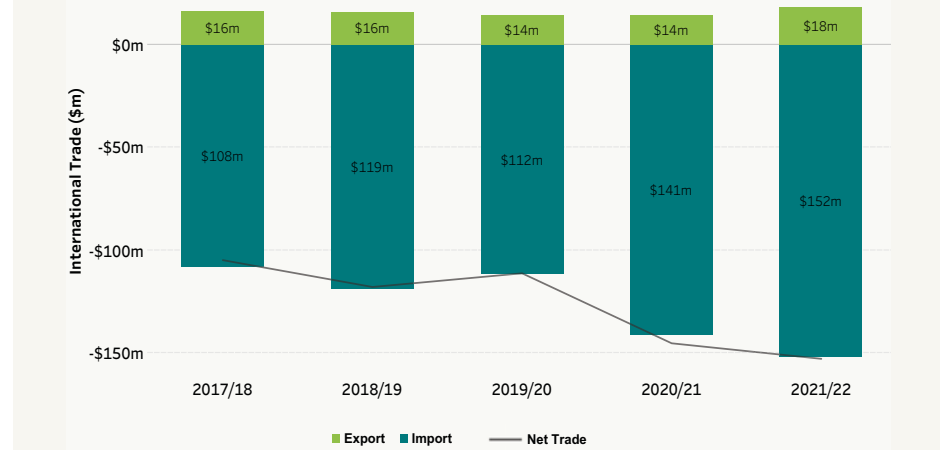


**\$3.17B**

The value of production was **\$3.17B** while the wholesale value of the fresh supply was **\$3.42B**.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (\$m)	\$3,136.2	\$3,374.8	+8%	\$3,170.5	-6%
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%	\$3,424.5	-5%

### ALL OTHER FRESH HORTICULTURE INTERNATIONAL TRADE



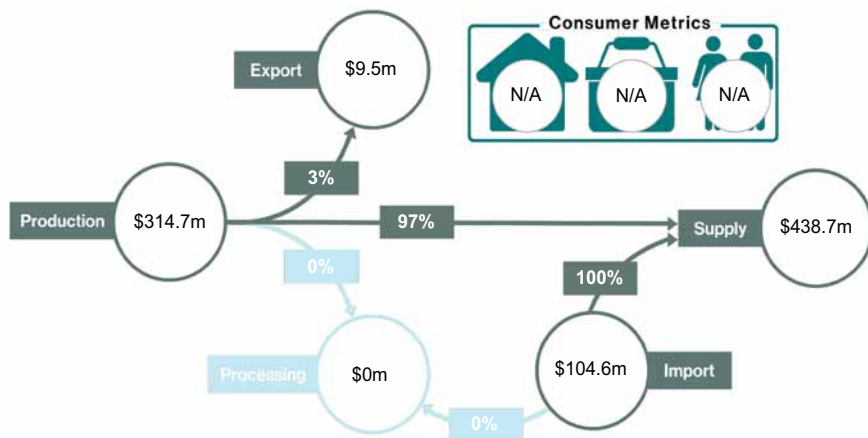
# Cut Flowers



# 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	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



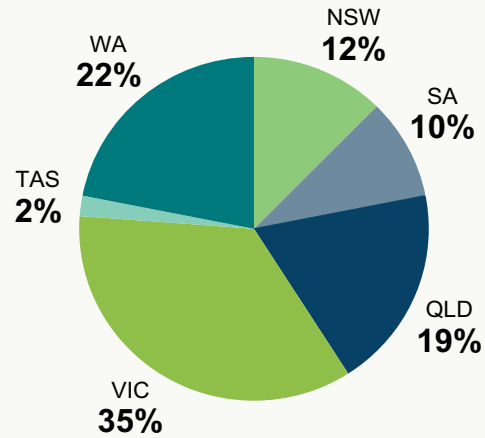
Source: FA

Cut flowers are grown year round in Australia, with peaks in February 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:



2021/22 CUT FLOWERS PRODUCTION BY STATE



Source: FA

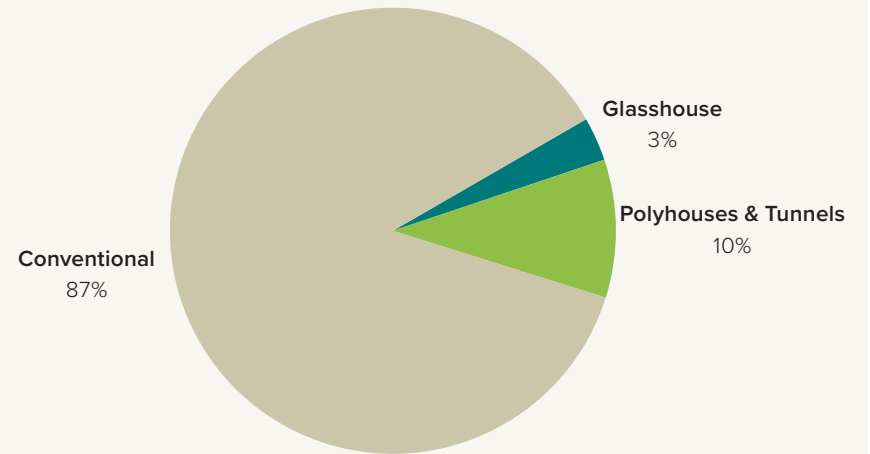
2021/22 CUT FLOWERS SEASONALITY BY STATE

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

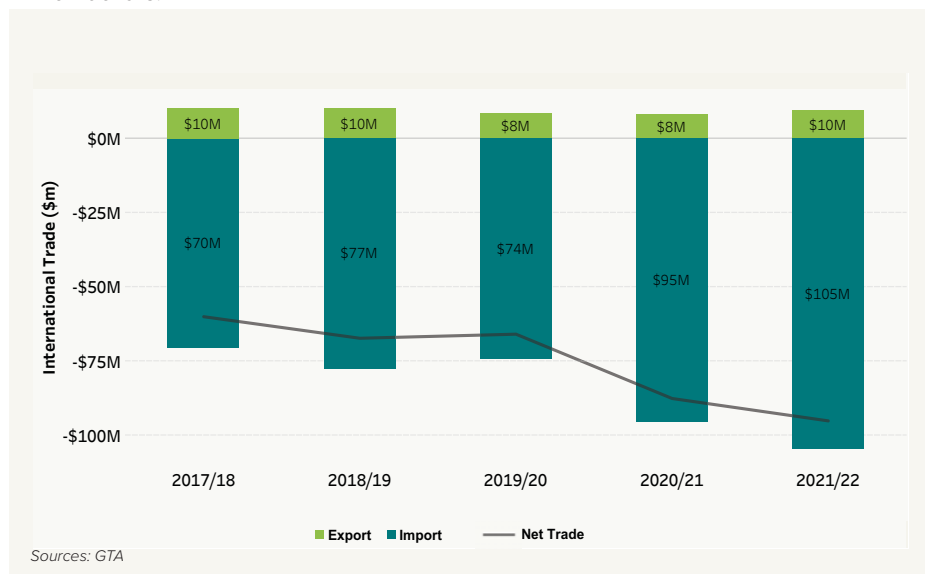
State	Glasshouse			Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	3	-	\$1.2	10	-	\$3.9	105	-	\$33.8
Victoria	7	-	\$3.5	30	-	\$11.1	299	-	\$96.3
Queensland	4	-	\$1.9	16	-	\$6.0	162	-	\$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	-	\$-



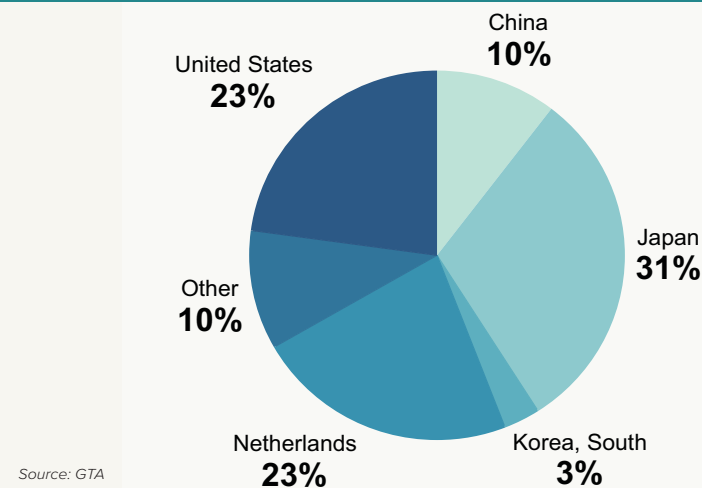
## Cut Flowers International Trade

### 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.



### 2021/22 CUT FLOWERS EXPORTS BY COUNTRY



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)				Exports by State of Production Origin (\$m)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	\$27.4	\$35.5	\$37.8	Queensland	\$3.0	\$2.8	\$4.0
Victoria	\$24.8	\$26.1	\$32.1	Western Australia	\$3.5	\$3.3	\$3.7
Western Australia	\$10.3	\$20.6	\$24.1	Victoria	\$1.7	\$1.6	\$1.7
Queensland	\$8.0	\$8.9	\$5.8	New South Wales	\$0.1	\$0.2	\$0.1
South Australia	\$3.6	\$4.2	\$4.9	<b>TOTAL</b>	<b>\$8.4</b>	<b>\$7.9</b>	<b>\$9.5</b>
<b>TOTAL</b>	<b>\$74.2</b>	<b>\$95.4</b>	<b>\$104.6</b>				

### CUT FLOWERS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (\$m)				Exports by Country (\$m)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
China	\$7.7	\$21.2	\$21.8	Japan	\$2.8	\$2.7	\$2.9
Malaysia	\$14.6	\$18.8	\$28.6	United States	\$1.3	\$1.2	\$2.2
Kenya	\$15.8	\$14.1	\$17.4	Netherlands	\$2.0	\$1.6	\$2.2
Ecuador	\$10.8	\$12.4	\$13.8	China	\$1.2	\$1.2	\$1.0
Colombia	\$9.2	\$9.5	\$9.0	Korea, South	\$0.3	\$0.3	\$0.3
Other	\$16.0	\$19.4	\$14.0	Other	\$0.7	\$0.9	\$1.0
<b>TOTAL</b>	<b>\$74.2</b>	<b>\$95.4</b>	<b>\$104.6</b>	<b>TOTAL</b>	<b>\$8.4</b>	<b>\$7.9</b>	<b>\$9.5</b>

Source: GTA

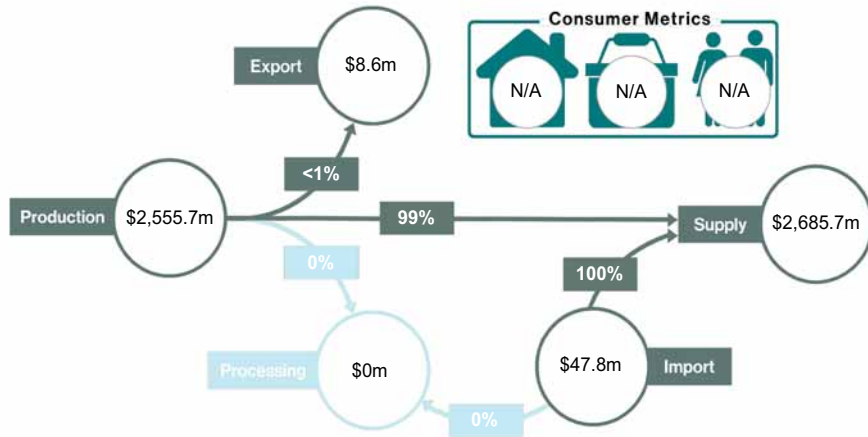
# Nursery

A wide-angle photograph of a nursery field. In the foreground and middle ground, numerous young trees of various species are planted in white plastic pots, arranged in neat, parallel rows on a green lawn. The trees vary in size and color, including some with bright yellow foliage. In the background, a dense, lush forest of taller trees stretches across the horizon under a bright, overcast sky. The overall scene is vibrant and organized, showcasing a large-scale horticultural operation.

# 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%	2,129	-8%	
Production (\$m)	\$2,563.0	\$2,789.5	+9%	\$2,555.7	-8%	
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%	\$2,685.7	-8%	

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

# Nursery Production

## MAJOR PRODUCTION AREAS



Source: Greenlife Industry Australia

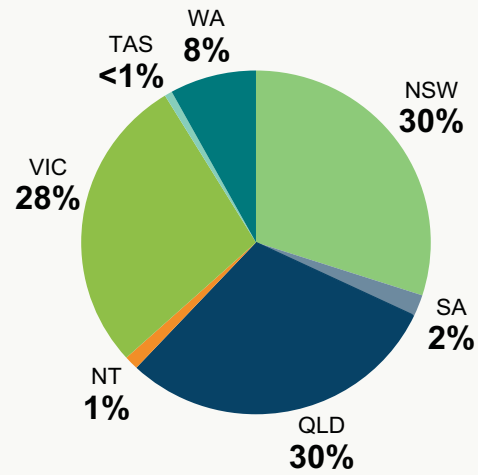
Nursery covers live plants grown for a range of uses that include; landscaping, revegetation and distribution of ornamental retail supply chain, plus as starter plants in the commercial production of fruit, vegetables and forestry. Nursery production occurs in all states and territories of Australia, 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



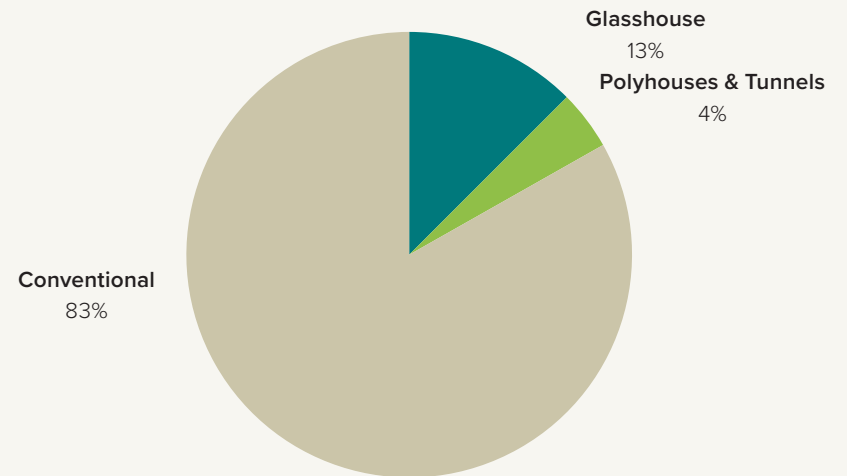
Source: ABS

2021/22 NURSERY SEASONALITY BY STATE

State	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	\$766.7	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low
New South Wales	\$766.7	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low
Victoria	\$715.6	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low
Western Australia	\$204.5	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low
South Australia	\$51.1	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low
Northern Territory	\$33.2	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low
Tasmania	\$17.9	Low	Low	High	High	High	High	Low	Low	Low	Low	Low	Low

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%**.

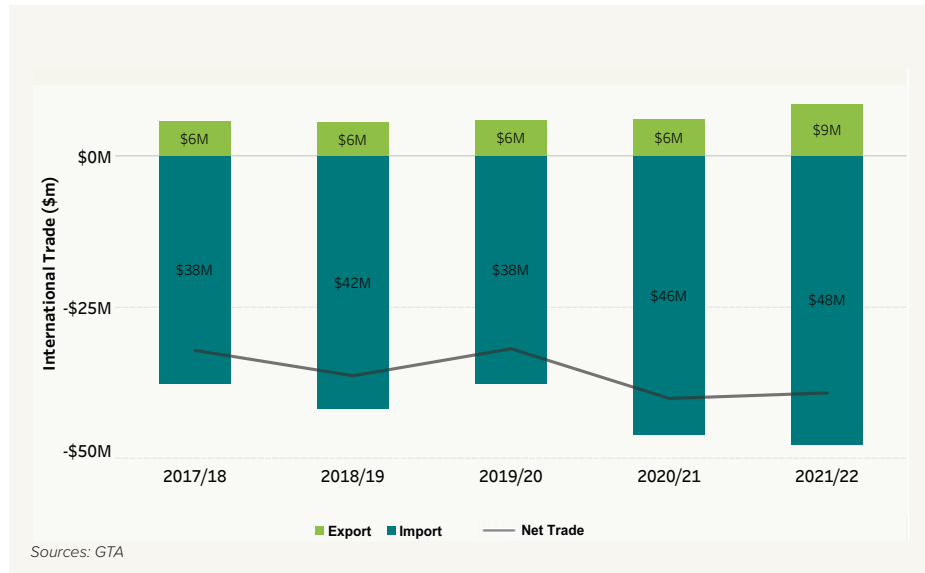
2021/22 NURSERY PRODUCTION SYSTEM BY STATE

State	Glasshouse			Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	241	-	\$95.9	139	-	\$33.0	1911	-	\$637.9
Victoria	225	-	\$89.5	130	-	\$30.8	1783	-	\$595.4
Queensland	241	-	\$95.9	139	-	\$33.0	1911	-	\$637.9
Western Australia	64	-	\$25.6	37	-	\$8.8	510	-	\$170.1
South Australia	16	-	\$6.4	9	-	\$2.2	127	-	\$42.5
Tasmania	6	-	\$2.2	3	-	\$0.8	45	-	\$14.9
Northern Territory	10	-	\$4.2	6	-	\$1.4	83	-	\$27.6

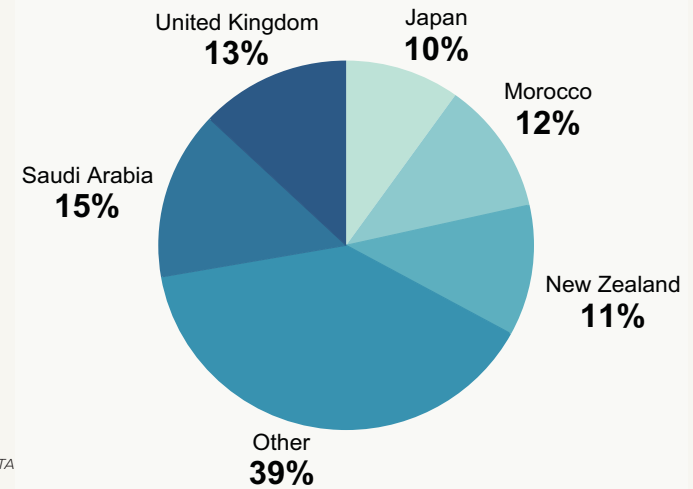
# Nursery International Trade

## 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.



## 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)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Victoria	\$23.5	\$26.7	\$29.0	New South Wales	\$1.6	\$1.8	\$2.7
Queensland	\$7.1	\$10.8	\$10.0	Queensland	\$1.5	\$1.6	\$1.9
New South Wales	\$3.7	\$4.0	\$4.5	Victoria	\$1.6	\$1.5	\$1.5
Western Australia	\$1.9	\$2.6	\$2.6	Tasmania	\$0.4	\$0.9	\$1.5
South Australia	\$1.1	\$1.1	\$1.2	Western Australia	\$0.9	\$0.1	\$1.1
Other	\$0.5	\$0.7	\$0.6	TOTAL	\$5.9	\$6.0	\$8.6
TOTAL	\$37.8	\$46.1	\$47.8				

## NURSERY IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Netherlands	\$15.6	\$17.9	\$17.9	Saudi Arabia	\$-	\$-	\$1.3
Taiwan	\$6.7	\$9.0	\$10.7	United Kingdom	\$0.3	\$1.2	\$1.1
China	\$8.2	\$10.8	\$9.4	New Zealand	\$0.7	\$0.8	\$1.0
New Zealand	\$2.1	\$2.3	\$2.7	Morocco	\$0.1	\$0.2	\$1.0
India	\$1.4	\$1.5	\$1.6	Japan	\$0.3	\$0.4	\$0.9
Other	\$3.6	\$4.5	\$5.5	Other	\$4.5	\$3.4	\$3.4
TOTAL	\$37.8	\$46.1	\$47.8	TOTAL	\$5.9	\$6.0	\$8.6

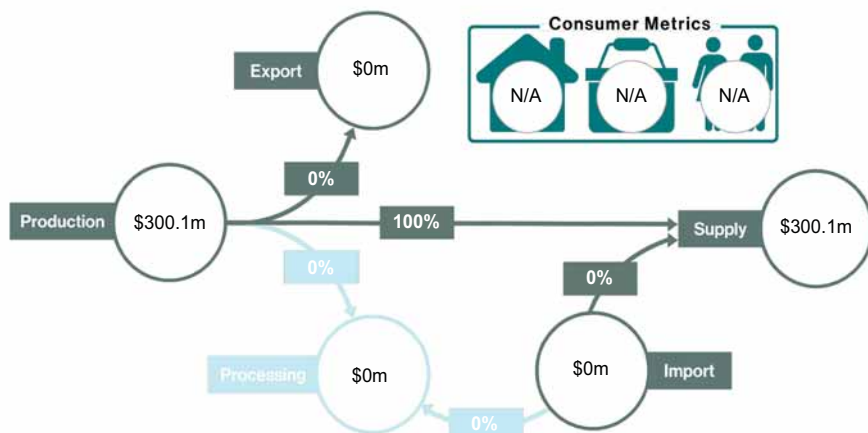
Source: GTA

# Turf



# Turf Overview

## TURF SUPPLY CHAIN – YEAR ENDING JUNE 2022



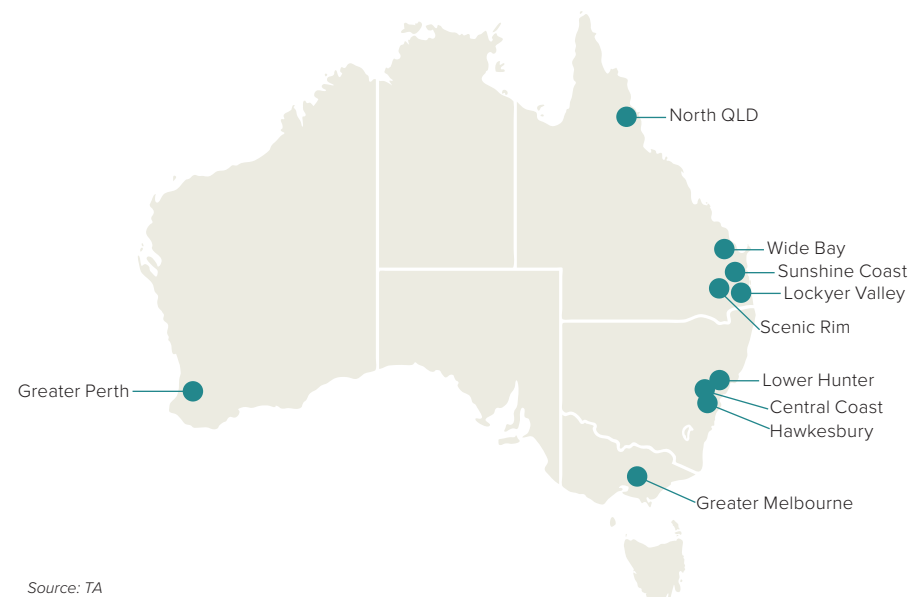
Sources: AC; CFVIWA; GTA; Turf Australia (TA); (Freshlogic Analysis)

YEAR ENDING JUNE	2020		2021		2022	
	Value	Value	%YoY	Value	%YoY	Value
Production (m m <sup>2</sup> )	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 <sup>2</sup> )	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



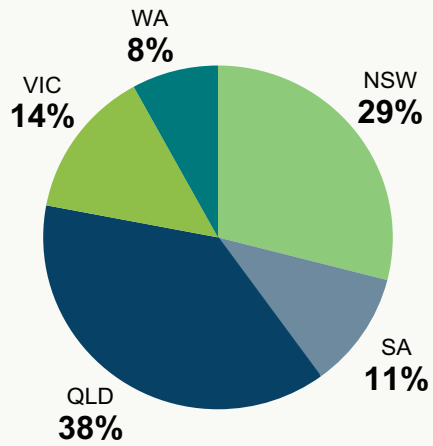
Source: TA

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:

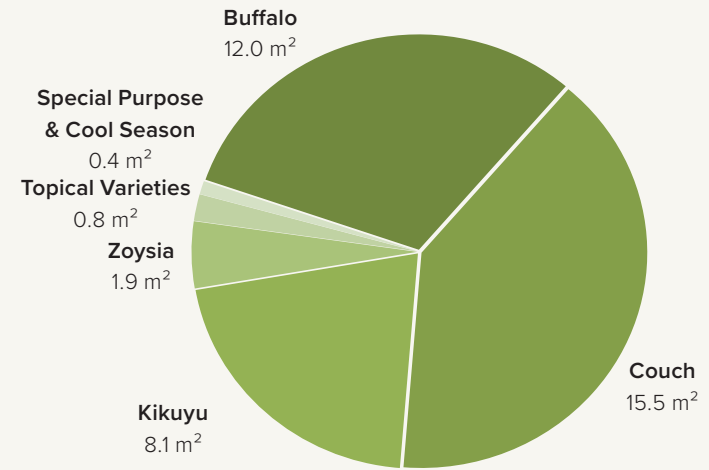


2021/22 TURF PRODUCTION BY STATE



Source: TA

2021/22 TURF PRODUCTION BY VARIETY



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	Low	Low	High	High	High	High	High	High	High	High	Medium	Low
New South Wales	\$87.0	Low	Low	Medium	High	High	High	High	High	High	High	Medium	Low
Victoria	\$42.0	Low	Low	Medium	High	High	High	High	High	High	High	Medium	Low
South Australia	\$33.0	Low	Low	Medium	High	High	High	High	High	High	High	Medium	Low
Western Australia	\$24.0	Low	Low	Medium	High	High	High	High	High	High	High	Medium	Low

Availability legend: High Medium Low None  
Source: TA