

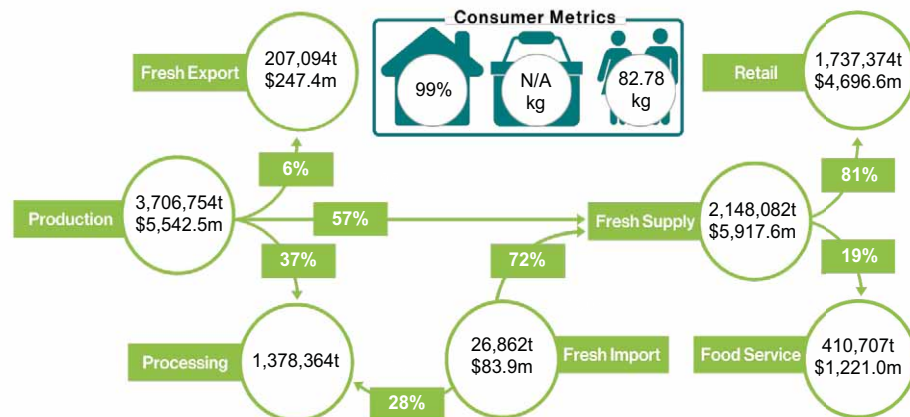


All Vegetables - Overview



All Fresh Vegetables Overview

ALL FRESH VEGETABLES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

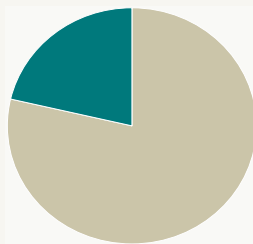
TOTAL PRODUCTION:



\$5,542.5M

3,706,754t produced and valued at \$5,542.5M with 37% sent to be processed.

RETAIL VS FOOD SERVICE:



Retail 81% Food Service 19%

The wholesale value of the fresh supply was \$5,917.6M, with \$4,696.6M distributed into retail and \$1,221.0M into food service.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	3,722,217	3,830,319	+3%	3,706,754	-3%
Production (\$m)	\$4,917.1	\$4,910.9	>-1%	\$5,542.5	+13%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	210,842	215,396	+2%	207,094	-4%
Fresh Export Value (\$m)	\$276.4	\$264.6	-4%	\$247.4	-7%
Fresh Import Volume (t)	33,067	30,725	-7%	26,862	-13%
Fresh Import Value (\$m)	\$107.1	\$91.3	-15%	\$83.9	-8%
Fresh Supply (t)	2,252,777	2,256,376	<1%	2,148,082	-5%
Fresh Supply Wholesale Value (\$m)	\$5,289.9	\$5,190.7	-2%	\$5,917.6	+14%
Supply per Capita (kg)	87.32	87.63	<1%	82.78	-6%
Retail Supply (t)	1,854,997	1,835,743	-1%	1,737,374	-5%
Retail Supply Wholesale Value (\$m)	\$4,283.9	\$4,130.5	-4%	\$4,696.6	+14%
Food Service Supply (t)	397,780	420,634	+6%	410,707	-2%
Food Service Wholesale Value (\$m)	\$1,006.0	\$1,060.2	+5%	\$1,221.0	+15%

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

ALL FRESH VEGETABLES INTERNATIONAL TRADE

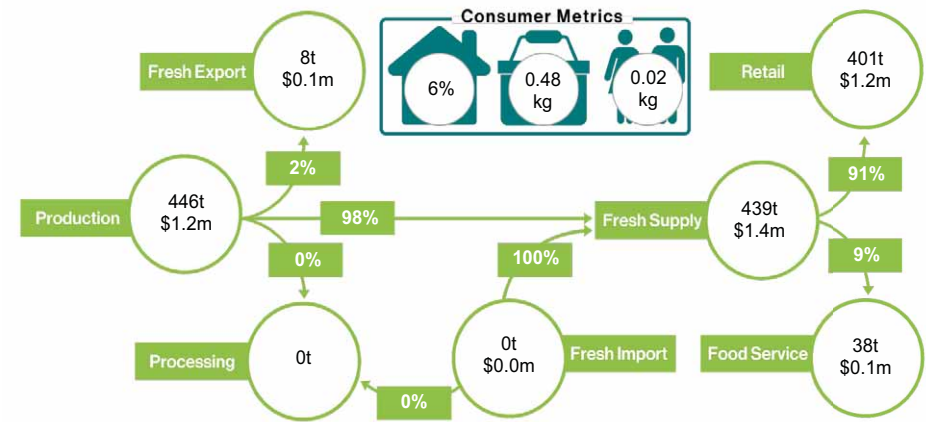


Artichokes



Fresh Artichokes Overview

FRESH ARTICHOKE SUPPLY CHAIN – YEAR ENDING JUNE 2022

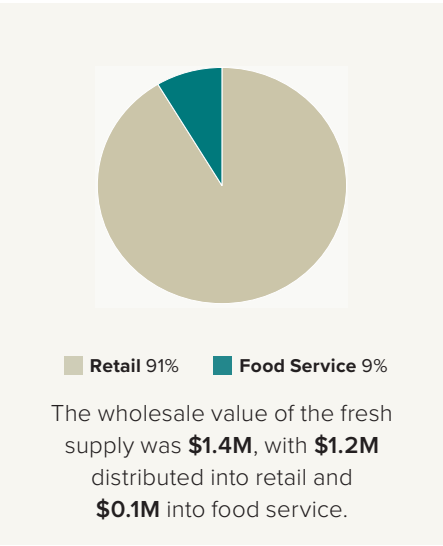


Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

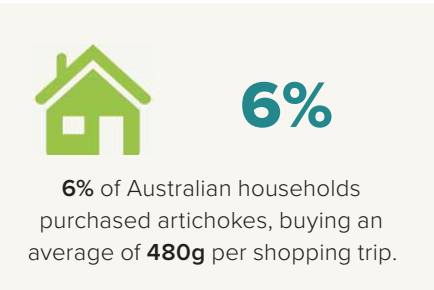
TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	452	456	<1%	446	-2%
Production (\$m)	\$1.0	\$1.2	+17%	\$1.2	+3%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	9	10	+15%	8	-23%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	+15%	< \$0.1	-11%
Fresh Import Volume (t)	1	2	+20%	-	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>-1%	\$-	-100%
Fresh Supply (t)	445	448	<1%	439	-2%
Fresh Supply Wholesale Value (\$m)	\$1.1	\$1.3	+17%	\$1.4	+3%
Supply per Capita (kg)	0.02	0.02	<1%	0.02	>-1%
Retail Supply (t)	408	411	<1%	401	-2%
Retail Supply Wholesale Value (\$m)	\$1.0	\$1.2	+17%	\$1.2	+3%
Food Service Supply (t)	37	37	<1%	38	+2%
Food Service Wholesale Value (\$m)	\$0.1	\$0.1	+17%	\$0.1	+8%

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

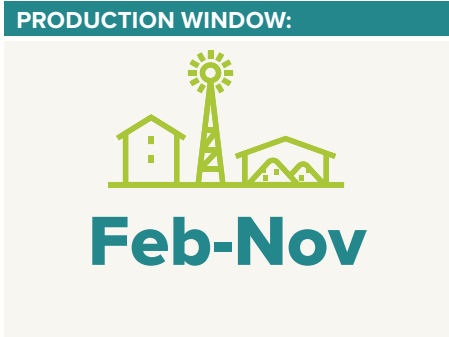
Fresh Artichokes Production

MAJOR PRODUCTION AREAS

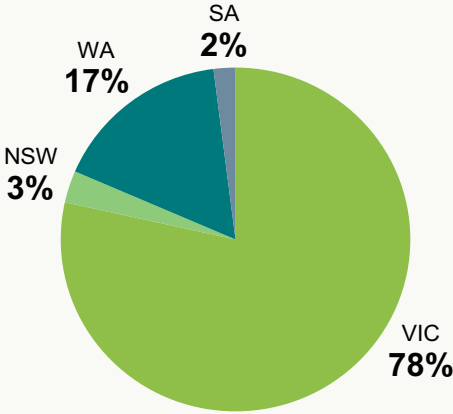


Source: AUSVEG

In this report, ‘Artichokes’ refers only to globe artichokes. It does not cover Jerusalem artichokes. Artichoke production occurs predominantly in Victoria, with other states producing smaller quantities. The majority of artichokes grown in Australia are destined for the fresh market, with a small export market.



2021/22 FRESH ARTICHOKE PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH ARTICHOKE SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	351	\$0.9	High	Medium	Medium	Medium	Medium	None	None	Medium	Medium	Medium	Medium	High
Western Australia	74	\$0.2	Medium	Medium	None	None	None	None	None	None	None	Medium	Medium	Medium
New South Wales	13	\$0.0	Medium	Medium	Medium	None	None	None	None	None	None	Medium	Medium	Medium
South Australia	9	\$0.0	Medium	Medium	Medium	None	None	None	None	None	None	None	Medium	Medium

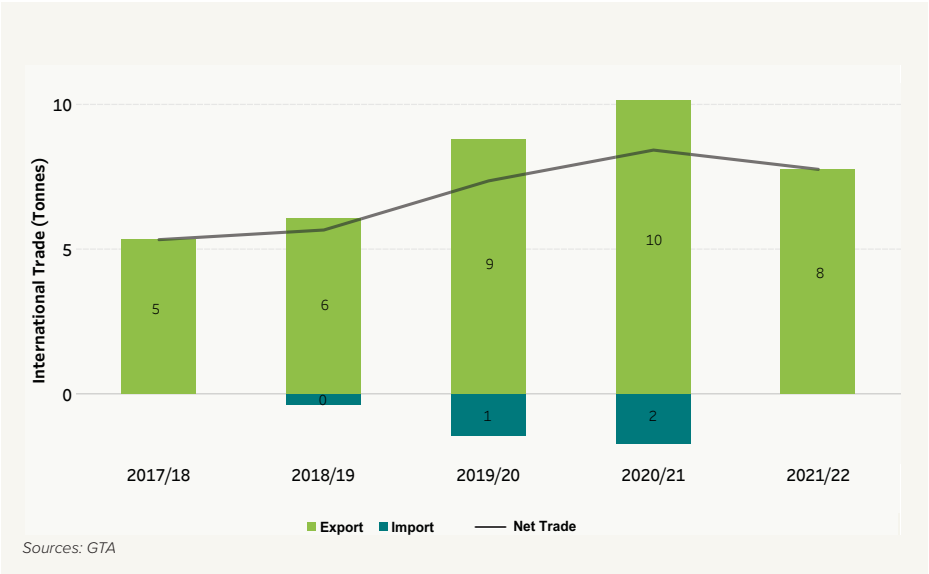
Availability legend: High Medium Low None

Source: AUSVEG

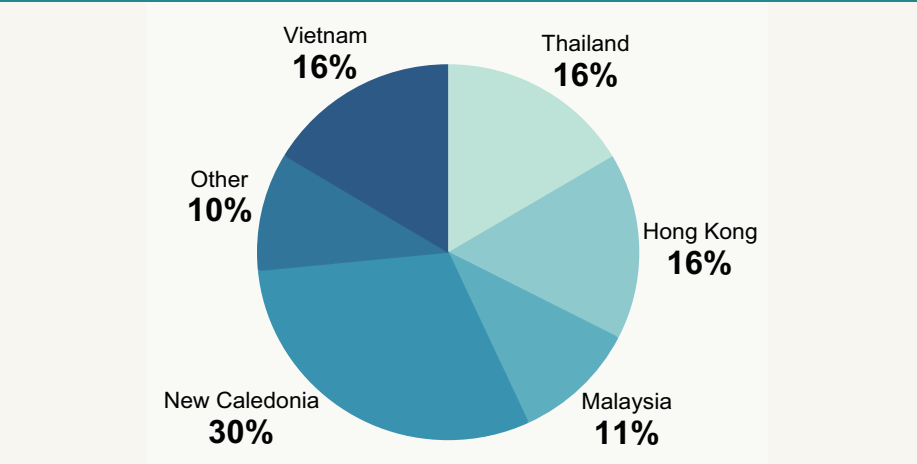
Fresh Artichokes International Trade

FRESH ARTICHOKES INTERNATIONAL TRADE

There is minimal trade of artichokes, with Australia only occasionally importing small volumes, and typically exporting between **5-10 tonnes** every year. For the year ending June 2022, Australia exported **8 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH ARTICHOKES EXPORTS BY COUNTRY



For the year ending June 2022, **30%** of exported fresh artichokes were sent to **New Caledonia**, as profiled in the chart above.

FRESH ARTICHOKES 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	1	1	-	Victoria	4	7	5
New South Wales	< 0.5	< 0.5	-	New South Wales	4	3	2
Other	< 0.5	< 0.5	-	Queensland	1	1	< 0.5
TOTAL	1	2	-	South Australia	-	-	< 0.5
				Western Australia	< 0.5	-	-
				Other	< 0.5	-	< 0.5
				TOTAL	9	10	8

FRESH ARTICHOKES 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
Egypt	1	2	-	New Caledonia	2	2	2
TOTAL	1	2	-	Thailand	2	2	1
				Vietnam	< 0.5	2	1
				Hong Kong	2	2	1
				Malaysia	1	1	1
				Other	2	2	1
				TOTAL	9	10	8

Source: GTA

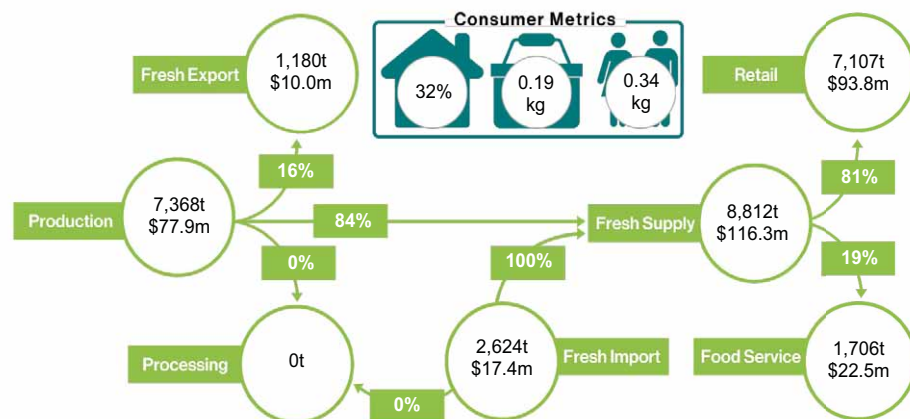


Asparagus



Fresh Asparagus Overview

FRESH ASPARAGUS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

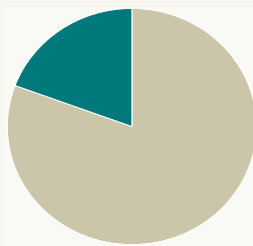
TOTAL PRODUCTION:



\$77.9M

7,368t produced and valued at **\$77.9M**

RETAIL VS FOOD SERVICE:



■ Retail 81% ■ Food Service 19%

The wholesale value of the fresh supply was **\$116.3M**, with **\$93.8M** distributed into retail and **\$22.5M** into food service.

CONSUMER METRICS:



32%

32% of Australian households purchased asparagus, buying an average of **190g** per shopping trip.

PER CAPITA CONSUMPTION:

0.34kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	8,279	6,857	-17%	7,368	+7%
Production (\$m)	\$86.7	\$72.4	-17%	\$77.9	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,068	1,876	-39%	1,180	-37%
Fresh Export Value (\$m)	\$24.9	\$19.6	-21%	\$10.0	-49%
Fresh Import Volume (t)	3,068	3,115	+2%	2,624	-16%
Fresh Import Value (\$m)	\$21.6	\$19.3	-11%	\$17.4	-10%
Fresh Supply (t)	8,279	8,096	-2%	8,812	+9%
Fresh Supply Wholesale Value (\$m)	\$122.6	\$106.7	-13%	\$116.3	+9%
Supply per Capita (kg)	0.32	0.31	-2%	0.34	+8%
Retail Supply (t)	6,786	6,582	-3%	7,107	+8%
Retail Supply Wholesale Value (\$m)	\$100.5	\$86.7	-14%	\$93.8	+8%
Food Service Supply (t)	1,493	1,514	+1%	1,706	+13%
Food Service Wholesale Value (\$m)	\$22.1	\$20.0	-10%	\$22.5	+13%

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



Fresh Asparagus Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

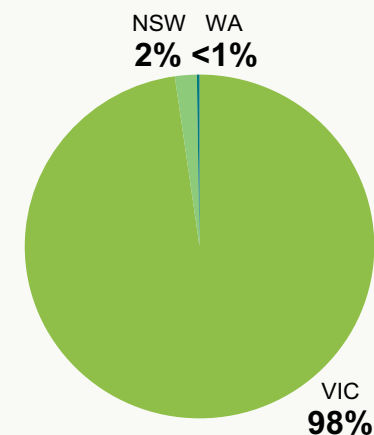
Asparagus production occurs predominantly in Victoria. There are typically two asparagus harvest: a spring cut, mainly destined for the export market, and a summer cut, primarily destined for the domestic market. There is minimal processing of local production, due to the low cost of imported product.

PRODUCTION WINDOW:



Jul-Apr

2021/22 FRESH ASPARAGUS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH ASPARAGUS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	7,202	\$76.2												
New South Wales	149	\$1.6												
Western Australia	18	\$0.2												

Availability legend: High Medium Low None

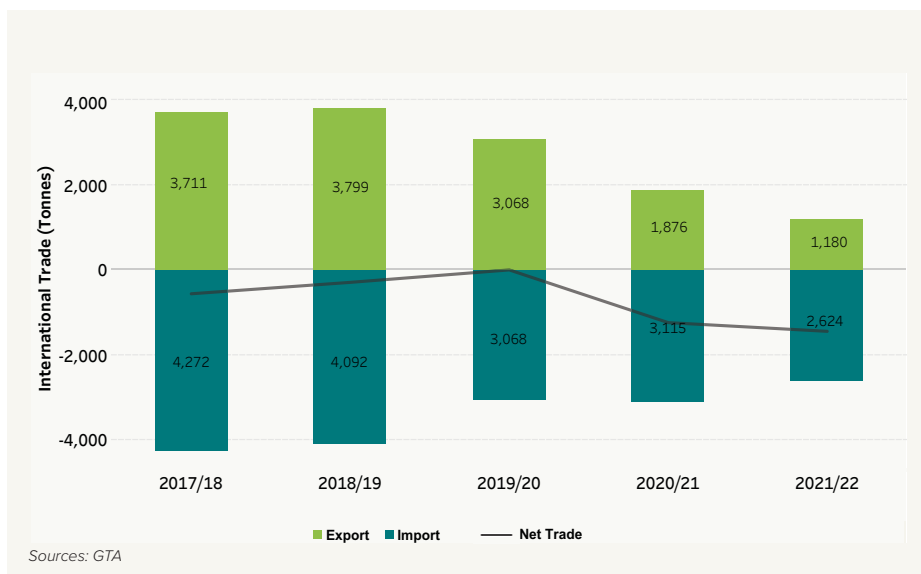
Source: AUSVEG



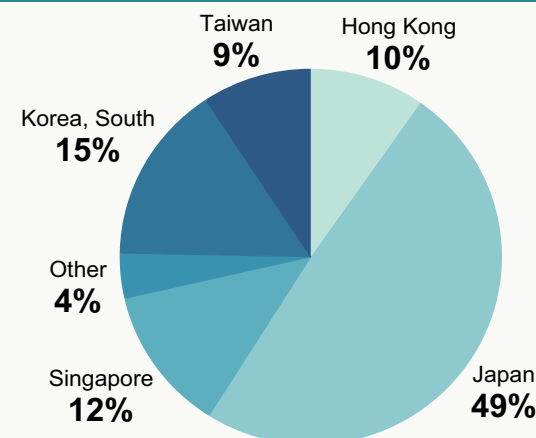
Fresh Asparagus International Trade

FRESH ASPARAGUS INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh asparagus, typically exporting between **1,500-3,500 tonnes** per year. For the year ending June 2022, Australia imported **2,684 tonnes**, and exported **1,180 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH ASPARAGUS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **49%** of exported fresh asparagus were sent to **Japan**, as profiled in the chart above.

FRESH ASPARAGUS 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
New South Wales	1,607	1,658	965	Victoria	3,046	1,865	1,162
Victoria	652	825	911	New South Wales	12	10	15
Queensland	487	454	516	Queensland	3	1	3
Western Australia	321	178	232	Northern Territory	-	< 0.5	< 0.5
Other	< 0.5	< 0.5	< 0.5	South Australia	2	-	-
TOTAL	3,068	3,115	2,624	Other	5	< 0.5	< 0.5
				TOTAL	3,068	1,876	1,180

FRESH ASPARAGUS 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
Mexico	2,899	3,002	2,564	Japan	2,159	1,253	581
US	42	96	58	Sth. Korea	202	162	182
Thailand	62	13	2	Singapore	223	168	148
Italy	-	< 0.5	< 0.5	Hong Kong	131	127	115
Mozambique	-	4	-	Taiwan	206	134	109
Other	65	< 0.5	< 0.5	Other	146	31	46
TOTAL	3,068	3,115	2,624	TOTAL	3,068	1,876	1,180

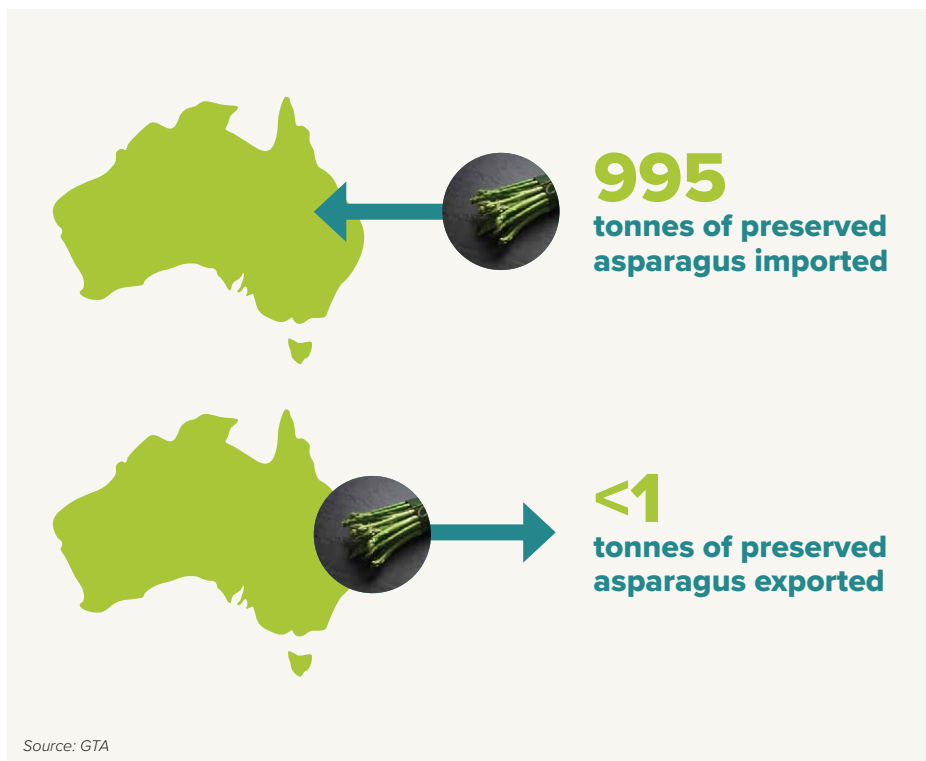
Source: GTA



Processed Asparagus International Trade

2021/22 PROCESSED ASPARAGUS INTERNATIONAL TRADE

For the year ending June 2022, an additional **995 tonnes** of preserved asparagus were imported, while **less than one tonne** was exported. These volumes have not been included in the fresh imports and exports profiled on page 188.



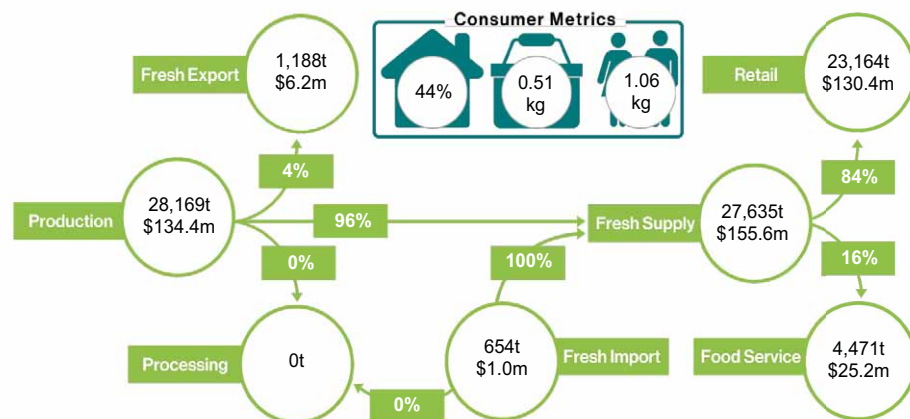
Beans





Fresh Beans Overview

FRESH BEANS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

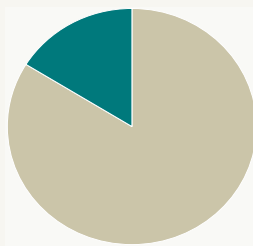
TOTAL PRODUCTION:



\$134.4M

28,169t produced and valued at **\$134.4M**

RETAIL VS FOOD SERVICE:



■ Retail 84% ■ Food Service 16%

The wholesale value of the fresh supply was **\$155.6M**, with **\$130.4M** distributed into retail and **\$25.2M** into food service.

CONSUMER METRICS:



44%

44% of Australian households purchased beans, buying an average of **509g** per shopping trip.

PER CAPITA CONSUMPTION:

1.06kg



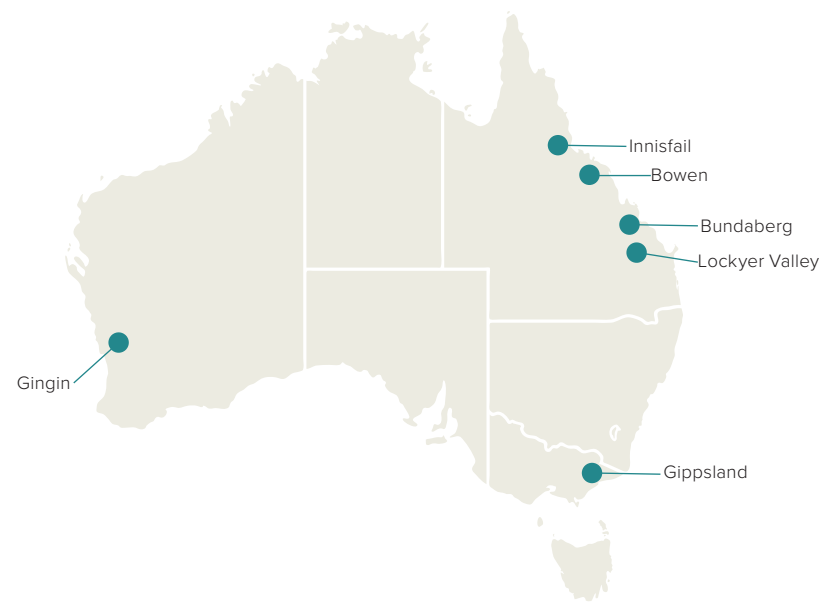
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	32,759	35,641	+9%	28,169	-21%
Production (\$m)	\$104.0	\$81.9	-21%	\$134.4	+64%
Production area (Ha)	6,414	-	-	-	-
Fresh Export Volume (t)	1,633	1,415	-13%	1,188	-16%
Fresh Export Value (\$m)	\$8.7	\$6.6	-25%	\$6.2	-5%
Fresh Import Volume (t)	559	400	-29%	654	+64%
Fresh Import Value (\$m)	\$0.7	\$0.5	-27%	\$1.0	+83%
Fresh Supply (t)	31,685	34,625	+9%	27,635	-20%
Fresh Supply Wholesale Value (\$m)	\$115.7	\$90.9	-21%	\$155.6	+71%
Supply per Capita (kg)	1.23	1.34	+9%	1.06	-21%
Retail Supply (t)	26,626	29,097	+9%	23,164	-20%
Retail Supply Wholesale Value (\$m)	\$97.2	\$76.4	-21%	\$130.4	+71%
Food Service Supply (t)	5,059	5,528	+9%	4,471	-19%
Food Service Wholesale Value (\$m)	\$18.5	\$14.5	-21%	\$25.2	+73%

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

Fresh Beans Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

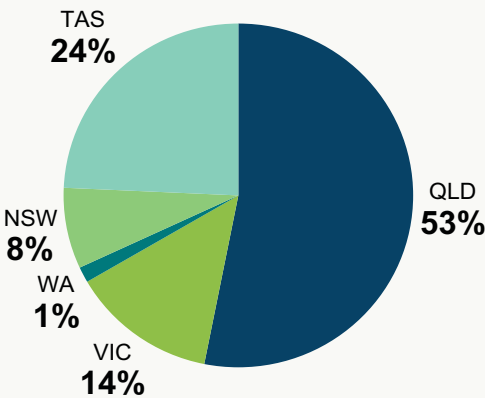
‘Beans’ refers to green beans, French beans and runner beans. This report does not cover Navy beans and other varieties that are commonly sold tinned. Green bean production occurs predominantly in Queensland. There is minimal processing of local production, due to low cost of imported product.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH BEANS PRODUCTION BY STATE



Source: ABS

2021/22 FRESH BEANS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	14,967	\$71.4	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High
Tasmania	6,840	\$32.6	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Victoria	3,808	\$18.2	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
New South Wales	2,144	\$10.2	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Western Australia	411	\$2.0	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

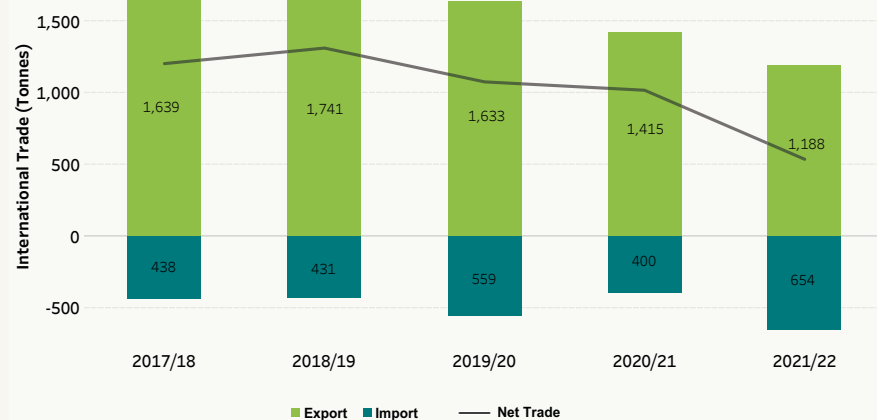
Source: AUSVEG



Fresh Beans International Trade

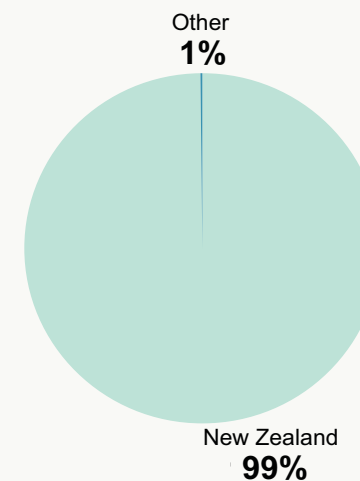
FRESH BEANS INTERNATIONAL TRADE

Australia is a net exporter of fresh beans, typically exporting between **1,400-1,700 tonnes** per year. For the year ending June 2022, Australia exported **1,188 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA

2021/22 FRESH BEANS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **99%** of exported fresh beans were sent to **New Zealand**, as profiled in the chart above.

FRESH BEANS 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	385	279	467	Queensland	1,585	1,409	1,185
Queensland	30	17	112	Victoria	3	2	2
New South Wales	114	55	74	New South Wales	39	3	1
Western Australia	31	49	-	Northern Territory	-	< 0.5	< 0.5
Other	-	< 0.5	< 0.5	Western Australia	6	-	-
TOTAL	559	400	654	Other	-	< 0.5	< 0.5
				TOTAL	1,633	1,415	1,188

FRESH BEANS 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
Canada	360	236	434	New Zealand	1,532	1,361	1,182
PNG	-	< 0.5	76	Switzerland	-	3	1
US	53	57	69	Hong Kong	15	6	1
Myanmar	-	-	50	PNG	2	2	1
Tanzania	24	-	24	Thailand	2	2	1
Other	122	106	1	Other	82	43	2
TOTAL	559	400	654	TOTAL	1,633	1,415	1,188

Source: GTA



Processed Beans International Trade

2021/22 PROCESSED BEANS INTERNATIONAL TRADE

For the year ending June 2022, an additional **7,349 tonnes** of frozen beans and **45,519 tonnes** of preserved beans were imported, while **17 tonnes** of frozen beans and **818 tonnes** of preserved beans were exported.



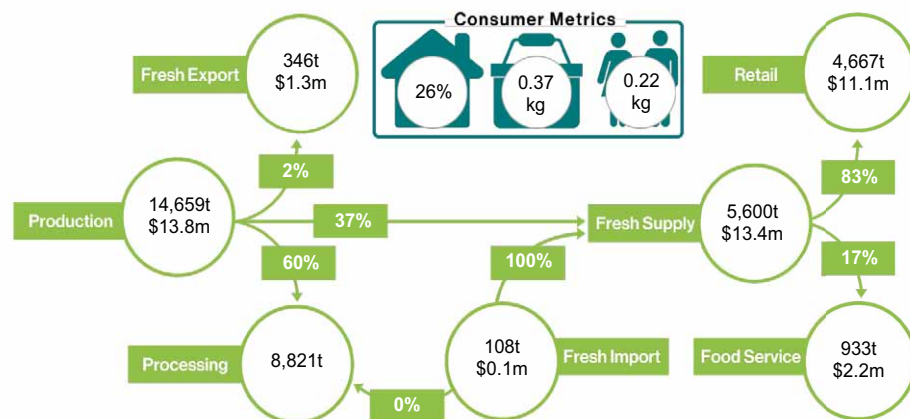
Beetroot





Fresh Beetroot Overview

FRESH BEETROOT SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

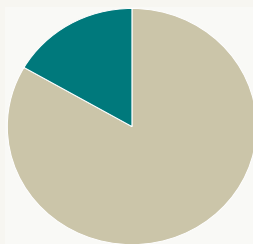
TOTAL PRODUCTION:



\$13.8M

14,659t produced and valued at **\$13.8M** with 60% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$13.4M**, with **\$11.1M** distributed into retail and **\$2.2M** into food service.

CONSUMER METRICS:



26%

26% of Australian households purchased beetroot, buying an average of **368g** per shopping trip.

PER CAPITA CONSUMPTION:

0.22kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	15,253	14,044	-8%	14,659	+4%
Production (\$m)	\$12.2	\$10.8	-12%	\$13.8	+28%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	375	371	-1%	346	-7%
Fresh Export Value (\$m)	\$1.3	\$1.4	+4%	\$1.3	-7%
Fresh Import Volume (t)	8	18	>100%	108	>100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	-39%	< \$0.1	>100%
Fresh Supply (t)	5,707	5,240	-8%	5,600	+7%
Fresh Supply Wholesale Value (\$m)	\$11.4	\$9.9	-13%	\$13.4	+34%
Supply per Capita (kg)	0.22	0.20	-8%	0.22	+6%
Retail Supply (t)	4,796	4,403	-8%	4,667	+6%
Retail Supply Wholesale Value (\$m)	\$9.6	\$8.3	-13%	\$11.1	+33%
Food Service Supply (t)	911	837	-8%	933	+12%
Food Service Wholesale Value (\$m)	\$1.8	\$1.6	-13%	\$2.2	+40%

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



Fresh Beetroot Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

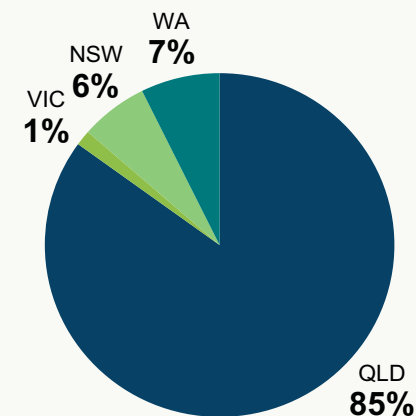
Beetroot production occurs predominantly in Queensland. Volumes grown for processing have decreased in recent years, however the majority of processed volume is tinned.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH BEETROOT PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH BEETROOT SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	12,459	\$11.7	High	High	Medium	Low	Low	Low	Low	Low	Low	Low	Low	High
Western Australia	1,071	\$1.0	Medium	Medium	Low	None	None	None	None	None	None	Low	Medium	Medium
New South Wales	918	\$0.9	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Victoria	212	\$0.2	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High

Availability legend: High Medium Low None

Source: AUSVEG

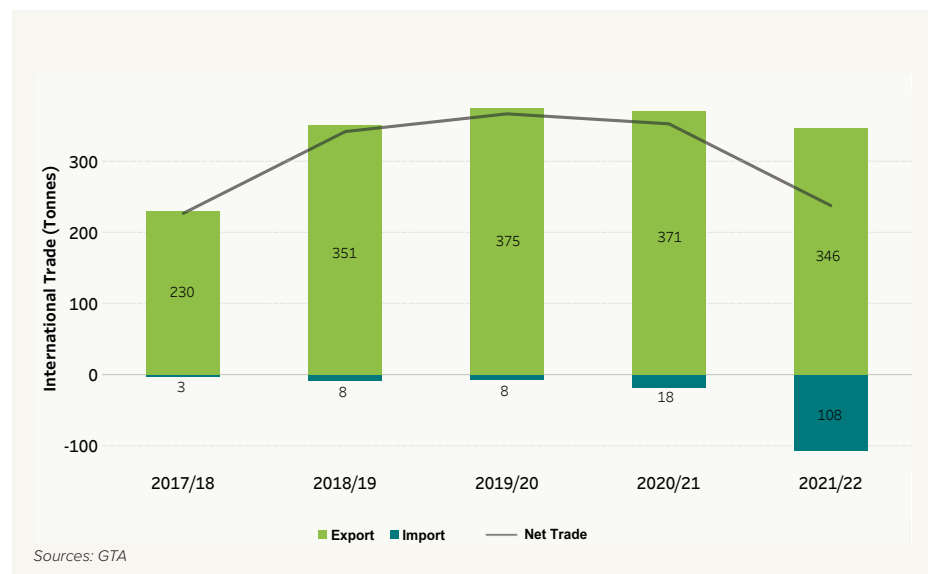


Fresh Beetroot, Celeriacs and Radishes International Trade

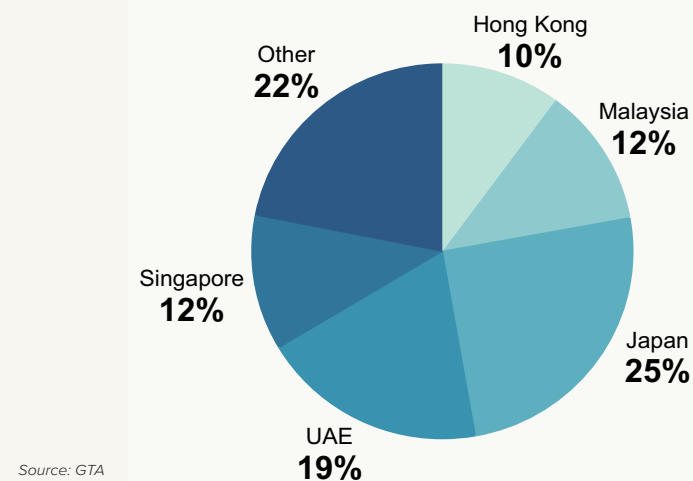
FRESH BEETROOT/CELERIACS/RADISHES INTERNATIONAL TRADE

Note: Trade data combines fresh beetroot, celeriacs and radishes.

For the year ending June 2022, Australia exported **346 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH BEETROOT/CELERIACS/RADISHES EXPORTS BY COUNTRY



For the year ending June 2022, **25%** of exported fresh beetroot were sent to **Japan**, as profiled in the chart above.

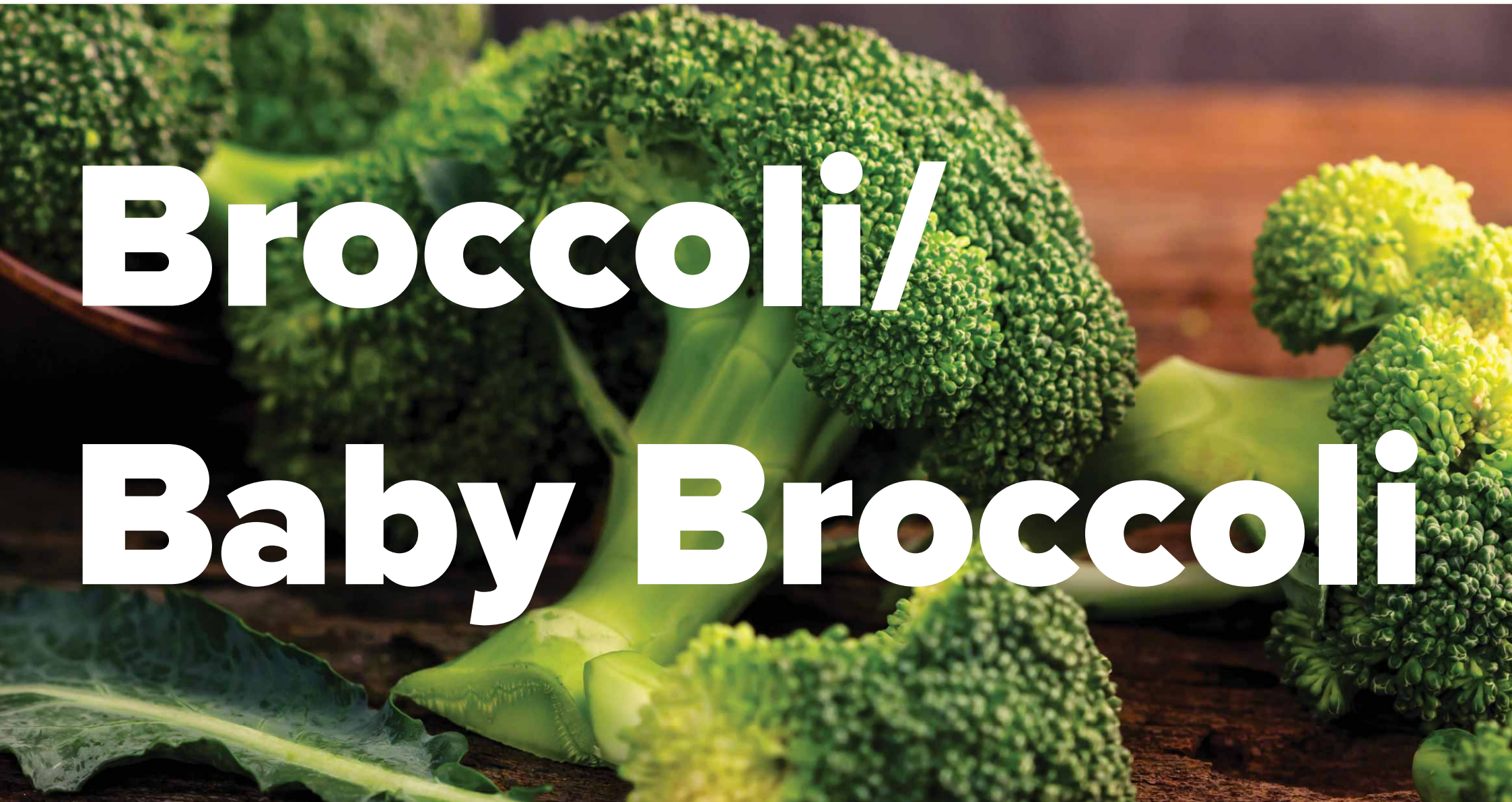
FRESH BEETROOT/CELERIACS/RADISHES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
South Australia	-	16	81	Victoria	131	121	122
New South Wales	3	2	14	Queensland	122	142	121
Victoria	1	-	13	New South Wales	52	63	50
Western Australia	4	-	-	Western Australia	22	19	29
TOTAL	8	18	108	Tasmania	6	13	13
				Other	43	14	11
				TOTAL	375	371	346

FRESH BEETROOT/CELERIACS/RADISHES 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
Spain	-	16	81	Japan	63	106	87
Tonga	-	-	25	UAE	25	18	66
India	3	1	1	Malaysia	52	47	42
Vietnam	1	< 0.5	-	Singapore	107	59	41
New Zealand	4	-	-	Hong Kong	30	41	35
Other	1	< 0.5	-	Other	100	99	76
TOTAL	8	18	108	TOTAL	375	371	346

Source: GTA

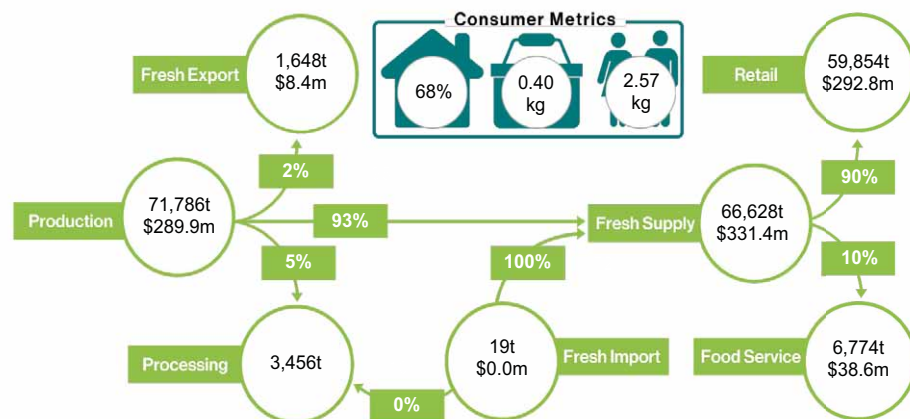


Broccoli/ Baby Broccoli



Fresh Broccoli/Baby Broccoli Overview

FRESH BROCCOLI/BABY BROCCOLI SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

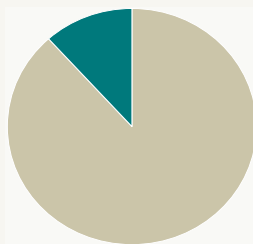
TOTAL PRODUCTION:



\$289.9M

71,786t produced and valued at **\$289.9M** with 5% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 90% ■ Food Service 10%

The wholesale value of the fresh supply was **\$331.4M**, with **\$292.8M** distributed into retail and **\$38.6M** into food service.

CONSUMER METRICS:



68%

68% of Australian households purchased broccoli/baby broccoli, buying an average of **395g** per shopping trip.

PER CAPITA CONSUMPTION:

2.57kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	76,581	80,199	+5%	71,786	-10%
Production (\$m)	\$286.1	\$260.3	-9%	\$289.9	+11%
Production area (Ha)	6,392	-	-	-	-
Fresh Export Volume (t)	5,169	3,619	-30%	1,648	-54%
Fresh Export Value (\$m)	\$20.1	\$15.8	-22%	\$8.4	-46%
Fresh Import Volume (t)	-	-	-	19	-
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	67,686	72,599	+7%	66,628	-8%
Fresh Supply Wholesale Value (\$m)	\$315.2	\$289.4	-8%	\$331.4	+15%
Supply per Capita (kg)	2.62	2.82	+7%	2.57	-9%
Retail Supply (t)	60,893	65,427	+7%	59,854	-9%
Retail Supply Wholesale Value (\$m)	\$278.8	\$255.2	-8%	\$292.8	+15%
Food Service Supply (t)	6,793	7,172	+6%	6,774	-6%
Food Service Wholesale Value (\$m)	\$36.3	\$34.2	-6%	\$38.6	+13%

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

Fresh Broccoli/Baby Broccoli Production

MAJOR PRODUCTION AREAS



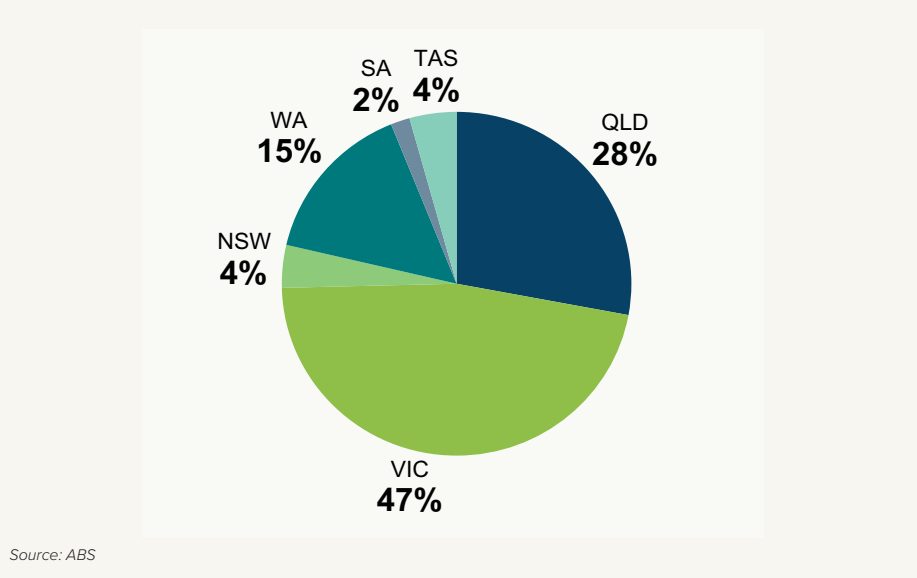
Source: AUSVEG

This section combines broccoli and baby broccoli. Baby broccoli refers to two distinct crops: baby broccoli is one of varieties of modified broccoli; and Broccolini™, a cross between broccoli and the leafy Asian vegetable ‘Gai Lan’ (Chinese Broccoli). Broccoli is grown in most states of Australia.

PRODUCTION WINDOW:

Year-round

2021/22 FRESH BROCCOLI/BABY BROCCOLI PRODUCTION BY STATE



2021/22 FRESH BROCCOLI/BABY BROCCOLI SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	33,530	\$135.4												
Queensland	20,044	\$80.9												
Western Australia	10,955	\$44.2												
Tasmania	3,114	\$12.6												
New South Wales	2,879	\$11.6												
South Australia	1,264	\$5.1												

Availability legend: High Medium Low None

Source: AUSVEG

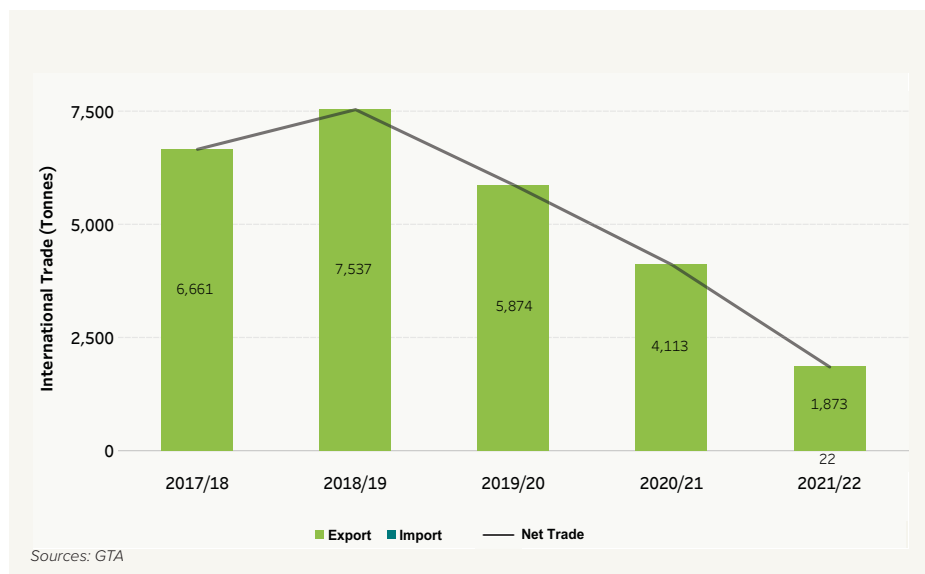


Fresh Broccoli and Cauliflower International Trade

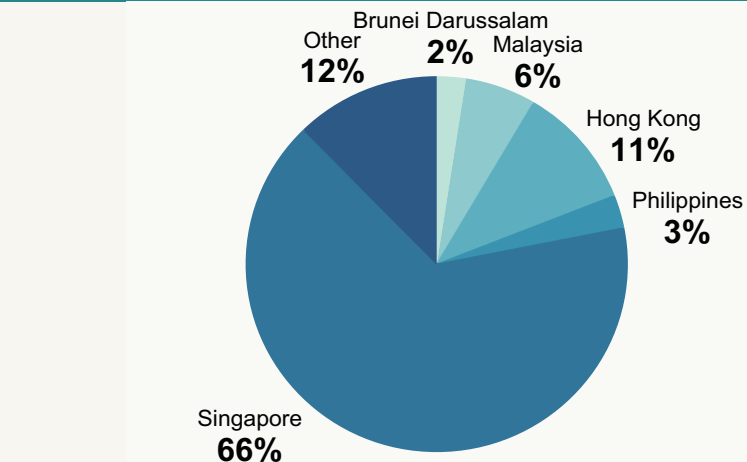
FRESH BROCCOLI AND CAULIFLOWER INTERNATIONAL TRADE

Note: Trade data combines fresh broccoli and cauliflower.

Australia is a net exporter of broccoli and cauliflower. For the year ending June 2022, Australia exported **1,873 tonnes**. The exports and imports over the last five financial years profiled in the graph below.



2021/22 FRESH BROCCOLI AND CAULIFLOWER EXPORTS BY COUNTRY



For the year ending June 2022, **66%** of exported fresh broccoli and cauliflower were sent to **Singapore**, as profiled in the chart above.

FRESH BROCCOLI AND CAULIFLOWER 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	-	-	22	Victoria	1,918	1,358	809
TOTAL	-	-	22	Queensland	2,481	1,616	725
				New South Wales	942	544	234
				Western Australia	485	493	68
				Tasmania	40	102	35
				Other	9	1	1
				TOTAL	5,874	4,113	1,873

FRESH BROCCOLI AND CAULIFLOWER 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
China	-	-	22	Singapore	3,212	2,720	1,233
TOTAL	-	-	22	Hong Kong	329	358	198
				Malaysia	359	283	113
				Philippines	131	15	53
				Brunei	101	99	46
				Other	1,743	638	231
				TOTAL	5,874	4,113	1,873

Source: GTA

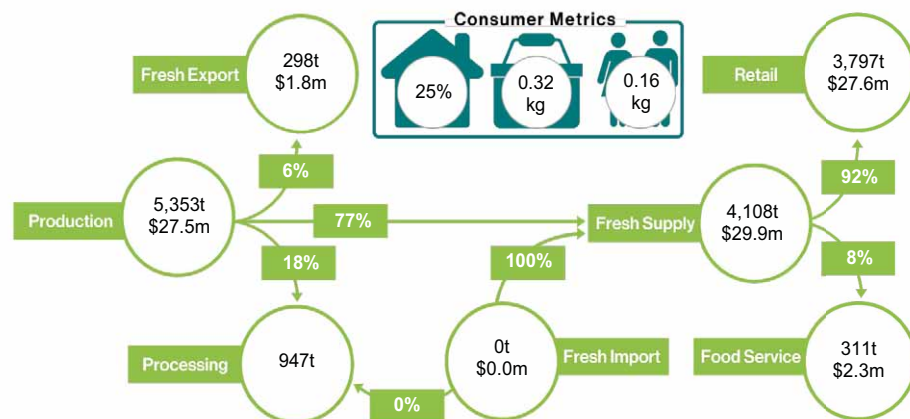


Brussels Sprouts



Fresh Brussels Sprouts Overview

FRESH BRUSSELS SPROUTS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

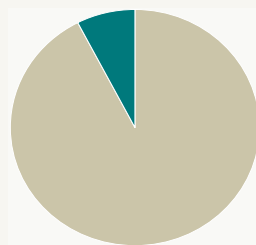
TOTAL PRODUCTION:



\$27.5M

5,353t produced and valued at **\$27.5M** with 18% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 92% ■ Food Service 8%

The wholesale value of the fresh supply was **\$29.9M**, with **\$27.6M** distributed into retail and **\$2.3M** into food service.

CONSUMER METRICS:



25%

25% of Australian households purchased brussels sprouts, buying an average of **319g** per shopping trip.

PER CAPITA CONSUMPTION:

0.16kg



in 2021/22 based on the volume supplied.

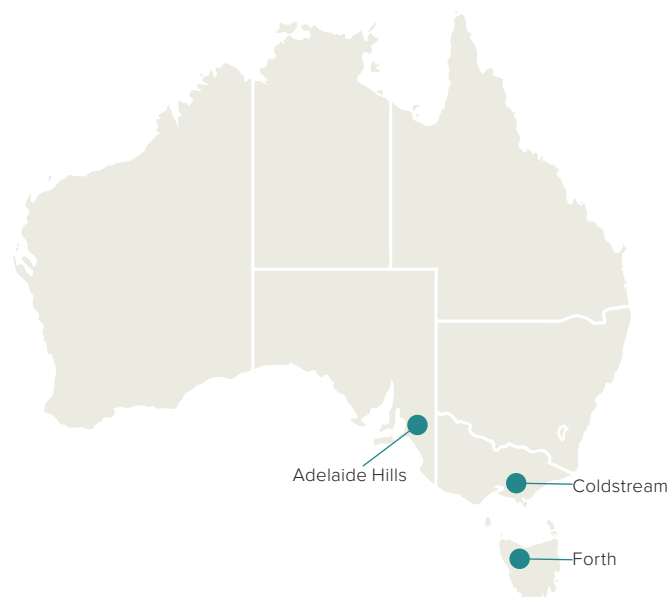
YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	5,609	6,263	+12%	5,353	-15%
Production (\$m)	\$20.9	\$25.7	+23%	\$27.5	+7%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	263	301	+15%	298	>-1%
Fresh Export Value (\$m)	\$1.6	\$2.0	+24%	\$1.8	-9%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	4,354	4,854	+11%	4,108	-15%
Fresh Supply Wholesale Value (\$m)	\$22.5	\$27.7	+23%	\$29.9	+8%
Supply per Capita (kg)	0.17	0.19	+12%	0.16	-16%
Retail Supply (t)	4,069	4,494	+10%	3,797	-16%
Retail Supply Wholesale Value (\$m)	\$21.1	\$25.6	+22%	\$27.6	+8%
Food Service Supply (t)	285	360	+26%	311	-13%
Food Service Wholesale Value (\$m)	\$1.5	\$2.0	+39%	\$2.3	+11%

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



Fresh Brussels Sprouts Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

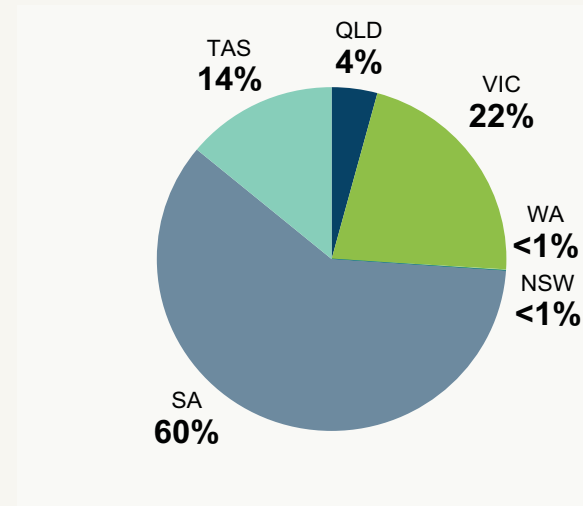
Brussels Sprouts production occurs in the southern states of Australia, with the majority of production occurring in South Australia.

PRODUCTION WINDOW:



Dec-Sep

2021/22 FRESH BRUSSELS SPROUTS PRODUCTION BY STATE



Source: ABS

2021/22 FRESH BRUSSELS SPROUTS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
South Australia	3,207	\$16.4	High	Medium	Medium	None	None	Low	Low	Medium	High	High	High	High
Victoria	1,164	\$6.0	High	Medium	None	None	None	None	None	Low	Low	Medium	High	High
Tasmania	749	\$3.8	Medium	Medium	None	None	None	None	Low	Low	Low	Low	Medium	Medium
Queensland	226	\$1.2	Low	Low	Low	None	None	None	None	None	None	Low	Low	Medium
New South Wales	7	\$0.0	Low	Low	None	None	None	None	None	None	None	None	None	Low

Availability legend: High Medium Low None

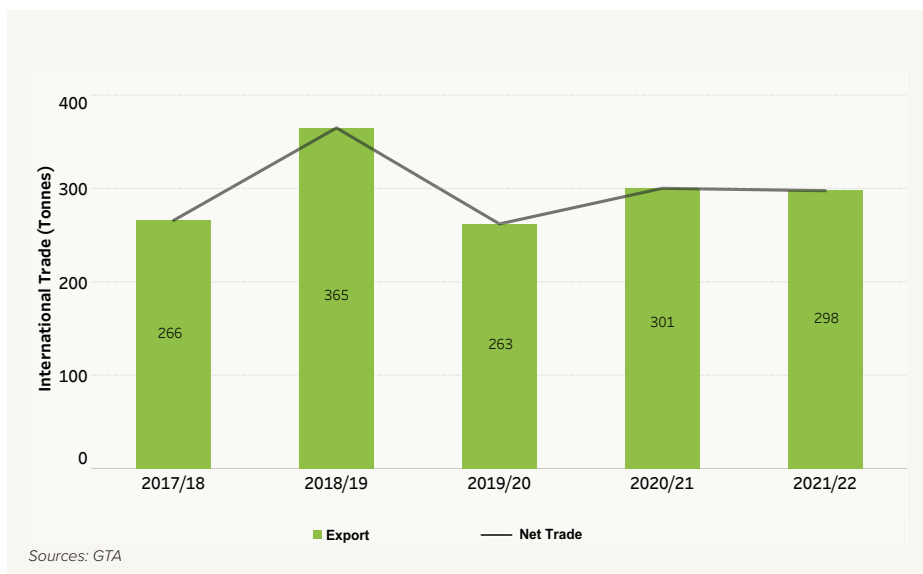
Source: AUSVEG



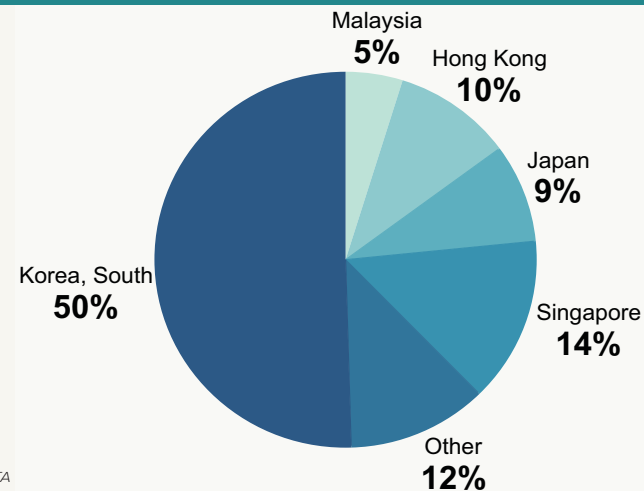
Fresh Brussels Sprouts International Trade

FRESH BRUSSELS SPROUTS INTERNATIONAL TRADE

Australia is a net exporter of Brussels Sprouts. For the year ending June 2022, Australia exported **298 tonnes**. The exports and imports over the last five years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH BRUSSELS SPROUTS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **50%** of exported fresh brussels sprouts were sent to **South Korea**, as profiled in the chart above.

FRESH BRUSSELS SPROUTS EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
South Australia	61	97	136
Victoria	106	132	123
New South Wales	32	47	23
Queensland	20	12	11
Western Australia	38	1	3
Other	6	12	3
TOTAL	263	301	298

FRESH BRUSSELS SPROUTS EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
South Korea	85	105	150
Singapore	38	60	43
Hong Kong	42	49	30
Japan	21	33	25
Malaysia	18	14	14
Other	59	39	35
TOTAL	263	301	298

Source: GTA

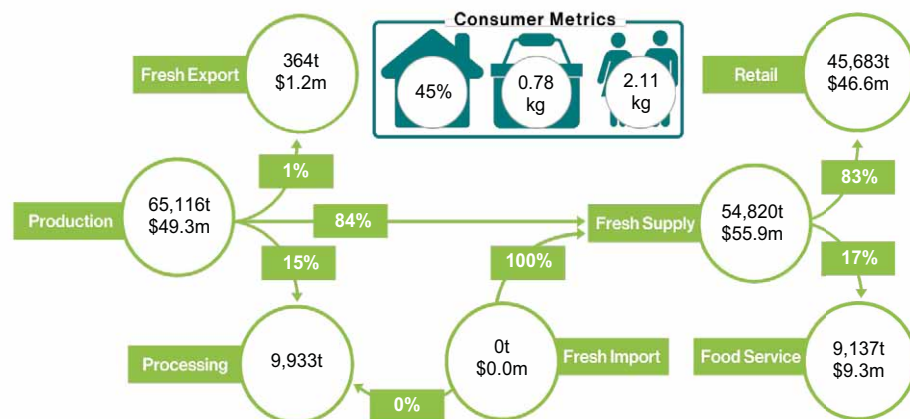
Cabbages

A close-up photograph of several fresh green cabbages. The cabbages are tightly packed, with their characteristic layered leaves visible. Some leaves have small water droplets on them, suggesting they are fresh. The background is dark, making the green cabbages stand out. The word "Cabbages" is overlaid in large white text across the center of the image.



Fresh Cabbages Overview

FRESH CABBAGES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

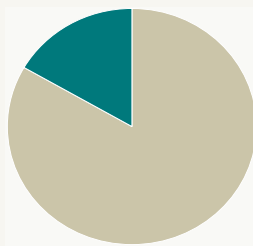
TOTAL PRODUCTION:



\$49.3M

65,116t produced and valued at **\$49.3M** with 15% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$55.9M**, with **\$46.6M** distributed into retail and **\$9.3M** into food service.

CONSUMER METRICS:



45%

45% of Australian households purchased cabbages, buying an average of **781g** per shopping trip.

PER CAPITA CONSUMPTION:

2.11kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	78,918	59,635	-24%	65,116	+9%
Production (\$m)	\$59.5	\$33.7	-43%	\$49.3	+46%
Production area (Ha)	2,310	-	-	-	-
Fresh Export Volume (t)	1,294	994	-23%	364	-63%
Fresh Export Value (\$m)	\$2.7	\$2.4	-13%	\$1.2	-50%
Fresh Import Volume (t)	-	8	-	-	-100%
Fresh Import Value (\$m)	\$-	< \$0.1	-	\$-	-100%
Fresh Supply (t)	65,586	49,552	-24%	54,820	+11%
Fresh Supply Wholesale Value (\$m)	\$66.2	\$36.7	-44%	\$55.9	+52%
Supply per Capita (kg)	2.54	1.92	-24%	2.11	+10%
Retail Supply (t)	56,297	42,352	-25%	45,683	+8%
Retail Supply Wholesale Value (\$m)	\$56.8	\$31.4	-45%	\$46.6	+48%
Food Service Supply (t)	9,289	7,200	-22%	9,137	+27%
Food Service Wholesale Value (\$m)	\$9.4	\$5.3	-43%	\$9.3	+75%

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

Fresh Cabbages Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

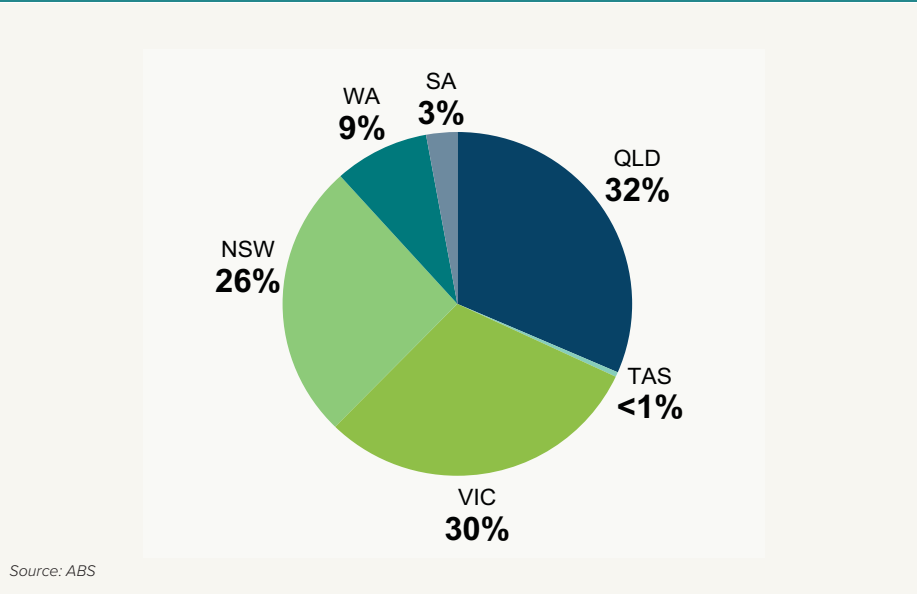
Cabbage production occurs in most states of Australia, with higher production predominantly occurring during the winter months.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CABBAGES PRODUCTION BY STATE



2021/22 FRESH CABBAGES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	20,522	\$15.5												
Victoria	19,778	\$15.0												
New South Wales	16,929	\$12.8												
Western Australia	5,733	\$4.3												
South Australia	1,862	\$1.4												
Tasmania	292	\$0.2												

Availability legend: High Medium Low None

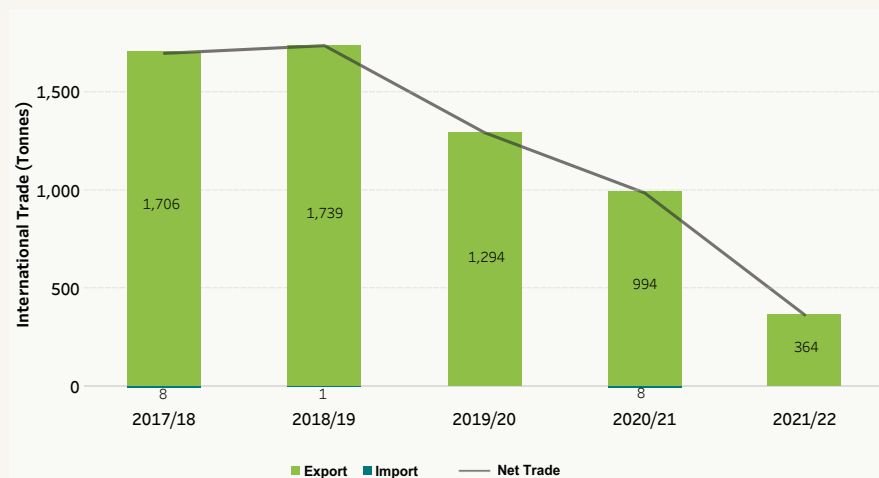
Source: AUSVEG



Fresh Cabbages International Trade

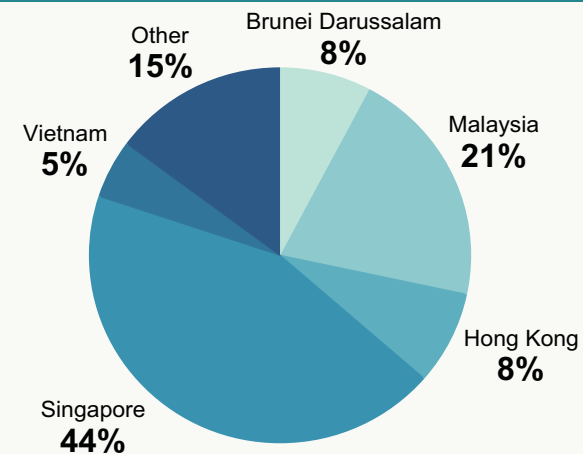
FRESH CABBAGES INTERNATIONAL TRADE

Australia is a net exporter of cabbages. For the year ending June 2022, Australia exported **364 tonnes**. The exports and imports over the last five years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA

2021/22 FRESH CABBAGES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **44%** of exported fresh cabbages were sent to **Singapore**, as profiled in the chart above.

FRESH CABBAGES 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	-	8	-	Queensland	324	285	152
TOTAL	-	8	-	Western Australia	777	464	132
				Victoria	143	150	50
				New South Wales	43	93	28
				South Australia	5	1	1
				Other	2	< 0.5	< 0.5
				TOTAL	1,294	994	364

FRESH CABBAGES 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
South Korea	-	8	-	Singapore	666	447	159
TOTAL	-	8	-	Malaysia	100	109	75
				Hong Kong	60	46	29
				Brunei	60	72	28
				Vietnam	1	12	18
				Other	407	308	54
				TOTAL	1,294	994	364

Source: GTA

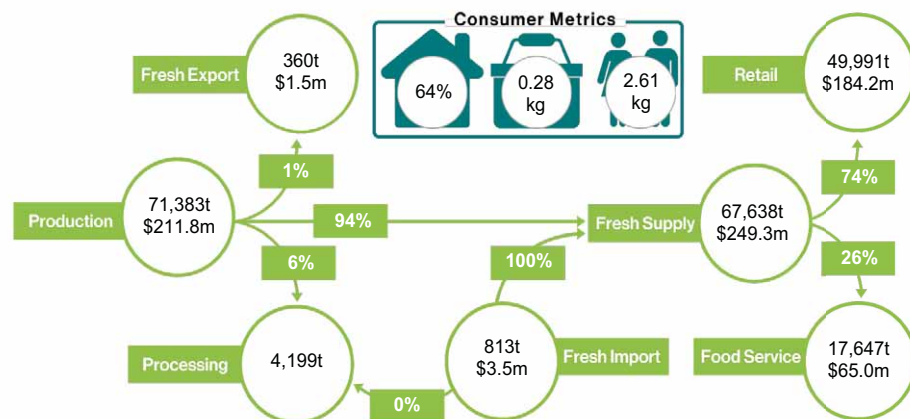
Capsicum





Fresh Capsicums Overview

FRESH CAPSICUMS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

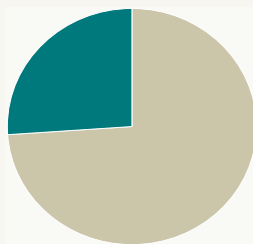
TOTAL PRODUCTION:



\$211.8M

71,383t produced and valued at \$211.9M with 6% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 74% ■ Food Service 26%

The wholesale value of the fresh supply was \$249.3M, with \$184.2M distributed into retail and \$65M into food service.

CONSUMER METRICS:



64%

64% of Australian households purchased capsicums, buying an average of **275g** per shopping trip.

PER CAPITA CONSUMPTION:

2.61kg



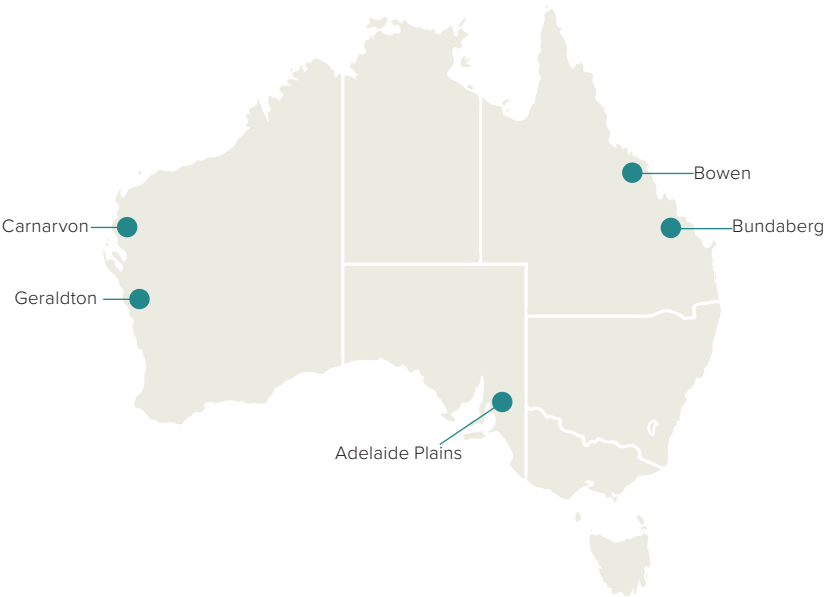
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	71,718	81,735	+14%	71,383	-13%
Production (\$m)	\$212.9	\$196.6	-8%	\$211.8	+8%
Production area (Ha)	2,058	-	-	-	-
Fresh Export Volume (t)	506	381	-25%	360	-6%
Fresh Export Value (\$m)	\$2.2	\$1.5	-32%	\$1.5	<1%
Fresh Import Volume (t)	695	748	+8%	813	+9%
Fresh Import Value (\$m)	\$2.7	\$3.1	+17%	\$3.5	+11%
Fresh Supply (t)	67,689	77,294	+14%	67,638	-12%
Fresh Supply Wholesale Value (\$m)	\$249.5	\$230.7	-8%	\$249.3	+8%
Supply per Capita (kg)	2.62	3.00	+14%	2.61	-13%
Retail Supply (t)	50,514	57,255	+13%	49,991	-13%
Retail Supply Wholesale Value (\$m)	\$186.2	\$170.9	-8%	\$184.2	+8%
Food Service Supply (t)	17,175	20,039	+17%	17,647	-12%
Food Service Wholesale Value (\$m)	\$63.3	\$59.8	-5%	\$65.0	+9%

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

Fresh Capsicums Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

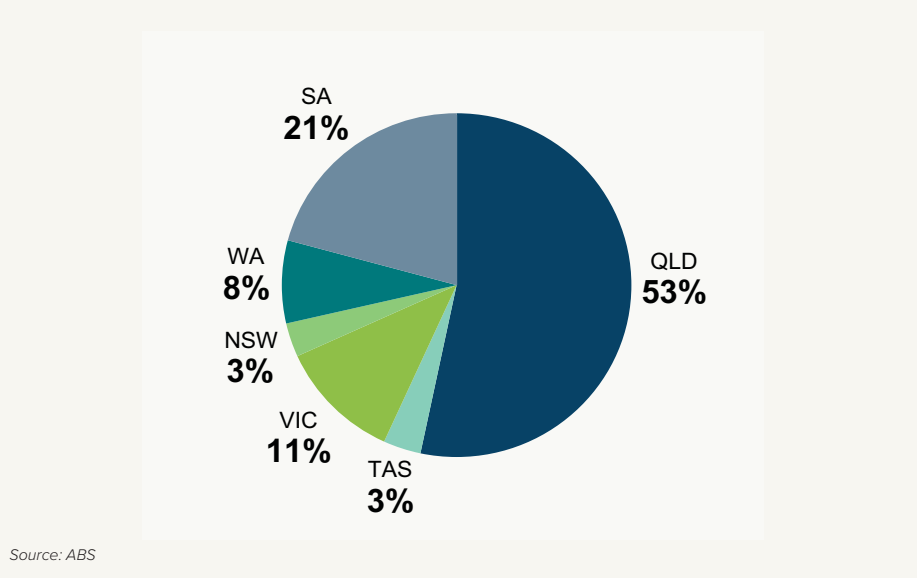
Capsicums, or bell peppers, are grown in most states of Australia. The majority of capsicums are currently grown outdoors in Queensland. However, increasingly capsicums are being grown year-round in high-tech greenhouses in the southern states.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CAPSICUMS PRODUCTION BY STATE



2021/22 FRESH CAPSICUMS SEASONALITY BY STATE

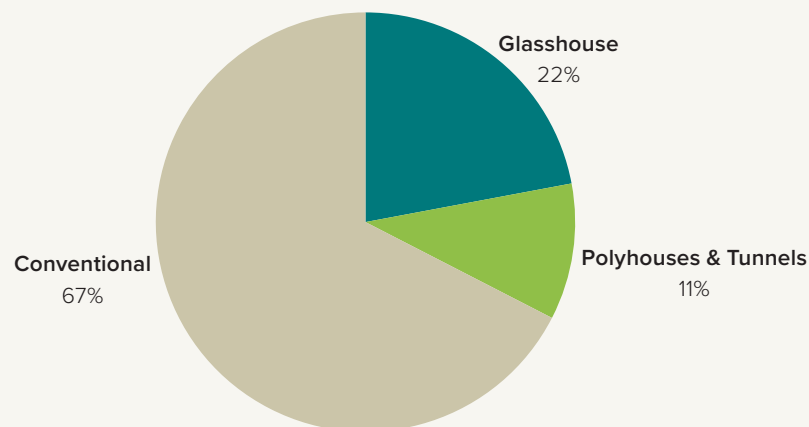
State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	38,065	\$103.5												
South Australia	14,837	\$52.5												
Victoria	8,149	\$26.9												
Western Australia	5,555	\$14.7												
Tasmania	2,496	\$8.3												
New South Wales	2,282	\$6.0												

Availability legend: High Medium Low None

Source: AUSVEG



2021/22 FRESH CAPSICUMS PRODUCTION BY SYSTEM



Production of capsicums in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 22%**, **Polyhouses & Tunnels 11%** and **Conventional 67%**.

2021/22 FRESH CAPSICUMS PRODUCTION SYSTEM BY STATE

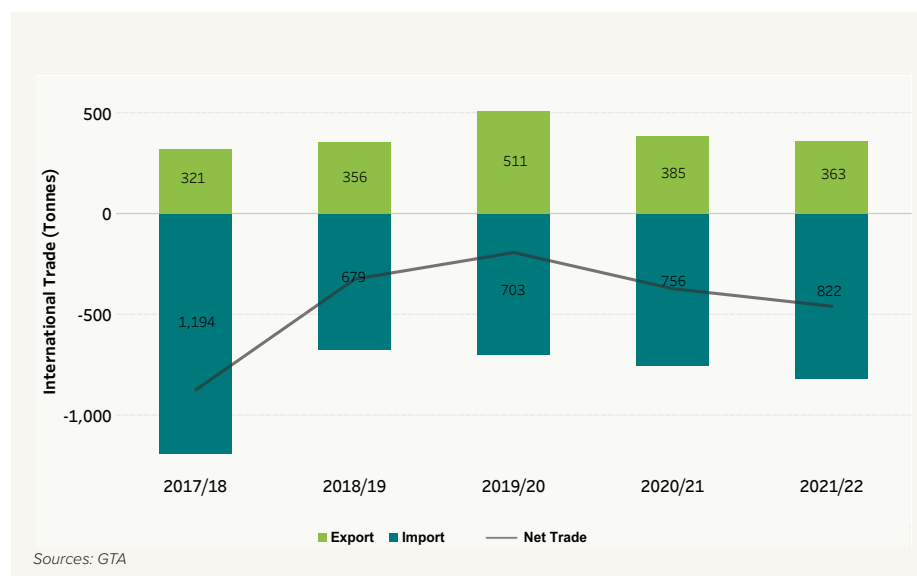
State	Glasshouse			Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	0	0	\$-	0	0	\$-	-	2,282	\$6.0
Victoria	8	3,000	\$12.1	16	3,100	\$10.3	-	2,049	\$4.5
Queensland	6	1,740	\$7.0	8	1,600	\$5.3	-	34,725	\$91.2
Western Australia	0	0	\$-	0	0	\$-	-	5,555	\$14.7
South Australia	24	9,600	\$38.6	14	2,800	\$9.3	-	2,437	\$4.6
Tasmania	4	1,400	\$5.6	0	0	\$-	-	1,096	\$2.7
Northern Territory	0	0	\$-	0	0	\$-	-	0	\$-

Fresh Capsicums and Chillies International Trade

FRESH CAPSICUMS INTERNATIONAL TRADE

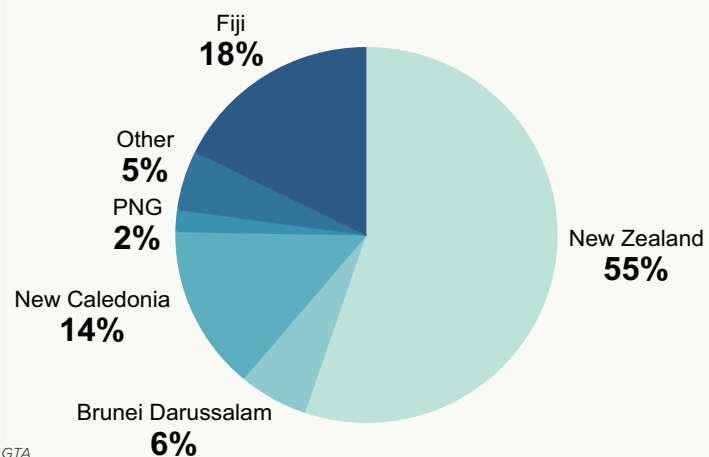
Note: Trade data combines fresh capsicums and chillies.

Australia is a net importer of capsicums and chillies, typically importing between **700-1,200 tonnes** every year, predominantly from New Zealand. For the year ending June 2022, Australia exported **363 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH CAPSICUMS AND CHILLIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **55%** of exported fresh capsicums and chillies were sent to **New Zealand**, as profiled in the chart above.

FRESH CAPSICUMS AND CHILLIES 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
New South Wales	496	613	505	Queensland	401	346	280
Victoria	80	114	122	Victoria	94	25	66
Western Australia	84	10	101	New South Wales	5	11	9
Queensland	40	13	88	South Australia	9	3	8
South Australia	2	6	4	Western Australia	1	1	-
Other	< 0.5	0	< 0.5	TOTAL	511	385	363
TOTAL	703	756	822				

FRESH CAPSICUMS AND CHILLIES 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
New Zealand	614	643	726	New Zealand	299	262	201
India	51	77	70	Fiji	134	20	64
Vietnam	37	36	25	New Caledonia	24	41	51
TOTAL	703	756	822	Brunei	18	24	22
				PNG	10	13	7
				Other	26	26	19
				TOTAL	511	385	363

Source: GTA

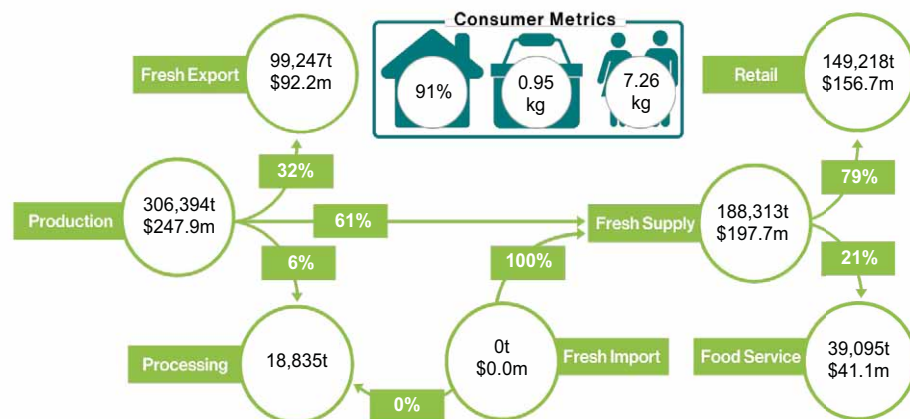
Carrots





Fresh Carrots Overview

FRESH CARROTS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

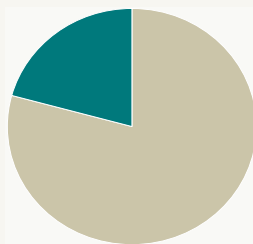
TOTAL PRODUCTION:



\$247.9M

306,394t produced and valued at \$247.9M with 6% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was \$197.7M, with \$156.7M distributed into retail and \$41.1M into food service.

CONSUMER METRICS:



91%

91% of Australian households purchased carrots, buying an average of 948g per shopping trip.

PER CAPITA CONSUMPTION:

7.26kg



in 2021/22 based on the volume supplied.

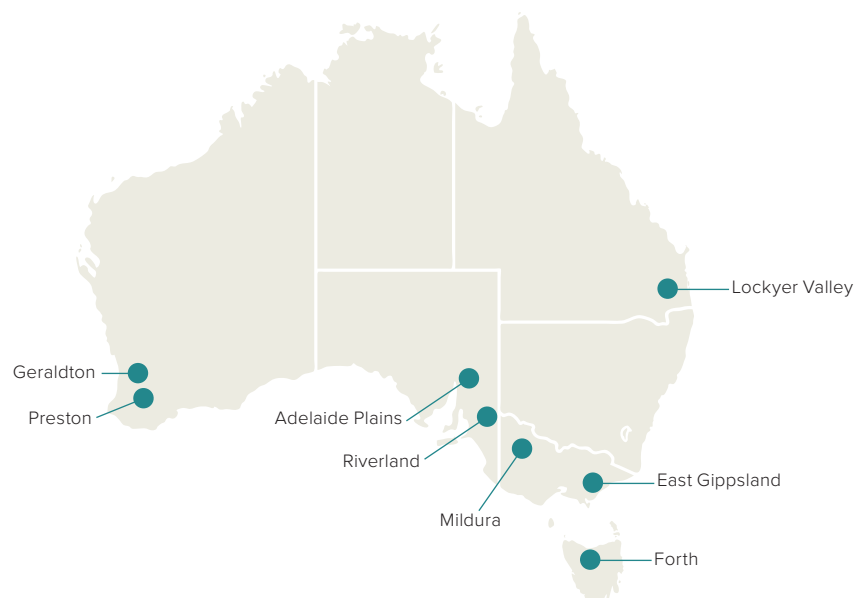
YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	330,145	335,527	+2%	306,394	-9%
Production (\$m)	\$222.1	\$256.0	+15%	\$247.9	-3%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	103,868	108,356	+4%	99,247	-8%
Fresh Export Value (\$m)	\$91.1	\$97.0	+6%	\$92.2	-5%
Fresh Import Volume (t)	-	-	-	<1	-
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	205,982	206,545	<1%	188,313	-9%
Fresh Supply Wholesale Value (\$m)	\$168.7	\$202.3	+20%	\$197.7	-2%
Supply per Capita (kg)	7.98	8.02	<1%	7.26	-10%
Retail Supply (t)	166,114	164,577	>-1%	149,218	-9%
Retail Supply Wholesale Value (\$m)	\$136.0	\$161.2	+19%	\$156.7	-3%
Food Service Supply (t)	39,867	41,967	+5%	39,095	-7%
Food Service Wholesale Value (\$m)	\$32.6	\$41.1	+26%	\$41.1	>-1%

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



Fresh Carrots Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

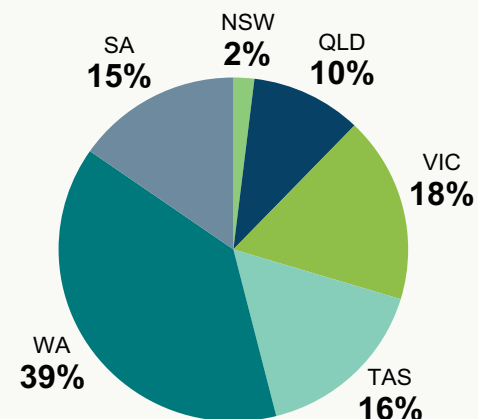
Carrot production occurs primarily in the southern states of Australia, with a large volume of carrots grown for the export market in Western Australia.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CARROTS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH CARROTS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Western Australia	118,312	\$95.7	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low
Victoria	53,643	\$43.4	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Tasmania	50,216	\$40.6	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	46,907	\$38.0	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Queensland	31,447	\$25.4	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	5,869	\$4.7	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: AUSVEG

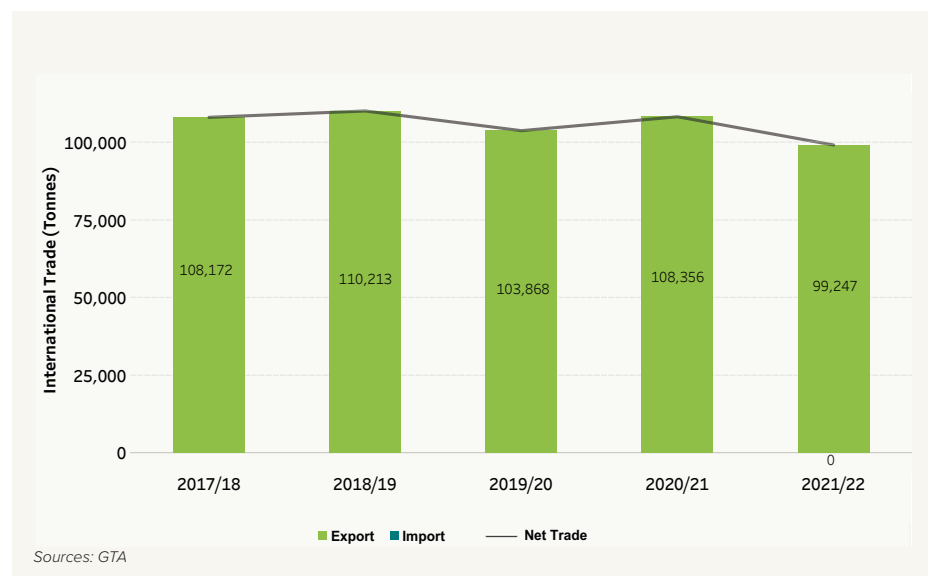


Fresh Carrots and Turnips International Trade

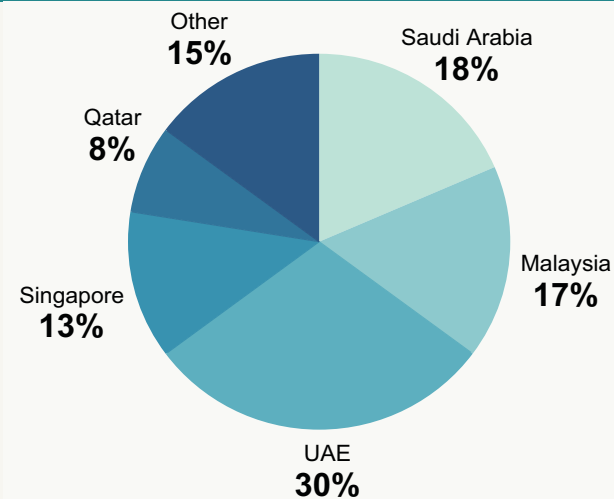
FRESH CARROTS AND TURNIPS INTERNATIONAL TRADE

Note: Trade data combines fresh carrots and turnips.

Australia is a net exporter of carrots and turnips, typically exporting between **100,000-110,000** tonnes every year, predominantly from Western Australia. For the year ending June 2022, Australia exported **99,247 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH CARROTS AND TURNIPS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **30%** of exported fresh carrots and turnips were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

FRESH CARROTS AND TURNIPS EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Queensland	2,502	4,170	1,567
Western Australia	94,082	96,848	92,641
Victoria	1,320	1,490	1,607
New South Wales	158	67	261
South Australia	696	674	482
Other	5,109	5,107	2,687
TOTAL	103,868	108,356	99,247

FRESH CARROTS AND TURNIPS EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Singapore	13,285	13,118	12,633
Malaysia	14,063	15,633	16,541
Hong Kong	4,002	4,130	3,293
Brunei	327	346	191
Vietnam	1	-	-
Other	72,190	75,130	66,588
TOTAL	103,868	108,356	99,247

Source: GTA

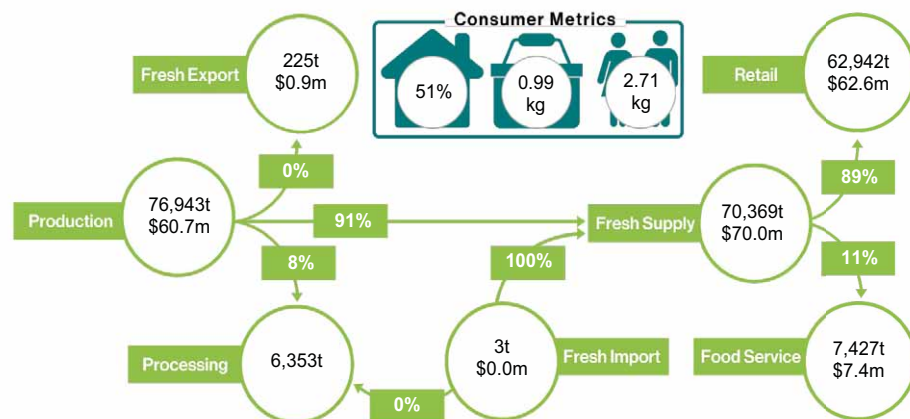
Cauliflowers





Fresh Cauliflowers Overview

FRESH CAULIFLOWERS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

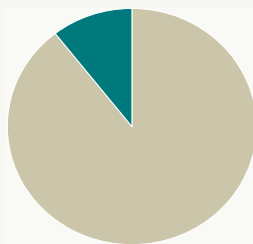
TOTAL PRODUCTION:



\$60.7M

76,943t produced and valued at **\$60.7M** with 8% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 89% ■ Food Service 11%

The wholesale value of the fresh supply was **\$70M**, with **\$62.6M** distributed into retail and **\$7.4M** into food service.

CONSUMER METRICS:



51%

51% of Australian households purchased cauliflowers, buying an average of **989g** per shopping trip.

PER CAPITA CONSUMPTION:

2.71kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	73,980	84,350	+14%	76,943	-9%
Production (\$m)	\$65.6	\$63.1	-4%	\$60.7	-4%
Production area (Ha)	2,851	-	-	-	-
Fresh Export Volume (t)	705	494	-30%	225	-54%
Fresh Export Value (\$m)	\$2.2	\$1.7	-22%	\$0.9	-49%
Fresh Import Volume (t)	-	-	-	3	-
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	67,166	76,891	+14%	70,369	-8%
Fresh Supply Wholesale Value (\$m)	\$74.4	\$72.0	-3%	\$70.0	-3%
Supply per Capita (kg)	2.60	2.99	+15%	2.71	-9%
Retail Supply (t)	60,510	68,961	+14%	62,942	-9%
Retail Supply Wholesale Value (\$m)	\$67.0	\$64.5	-4%	\$62.6	-3%
Food Service Supply (t)	6,656	7,931	+19%	7,427	-6%
Food Service Wholesale Value (\$m)	\$7.4	\$7.4	<1%	\$7.4	>-1%

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

Fresh Cauliflowers Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

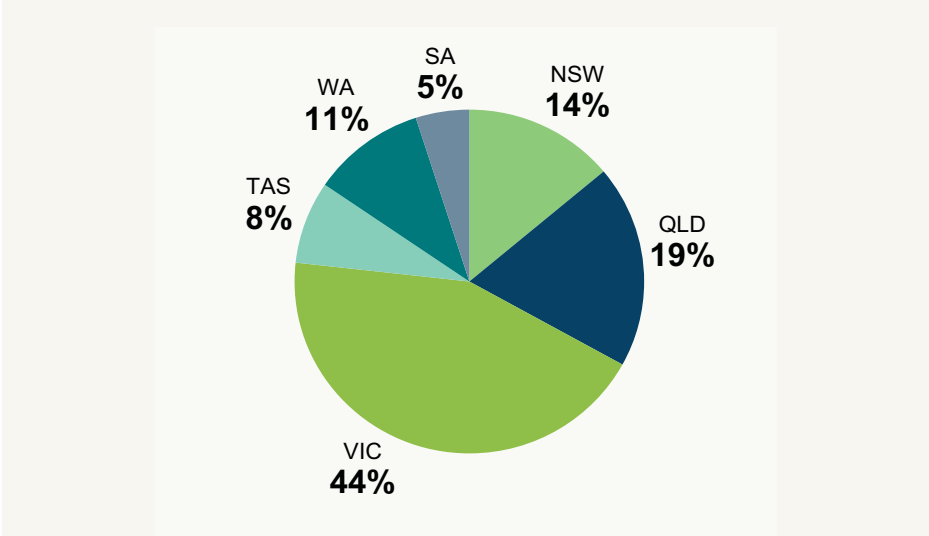
Cauliflower production occurs across most states in Australia, with production occurring during the winter months.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CAULIFLOWERS PRODUCTION BY STATE



Source: ABS

2021/22 FRESH CAULIFLOWERS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	33,648	\$26.5	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High
Queensland	14,696	\$11.6	Low	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low
New South Wales	10,720	\$8.5	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High
Western Australia	8,117	\$6.4	Low	High	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low
Tasmania	5,969	\$4.7	Low	Low	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low
South Australia	3,794	\$3.0	Low	Low	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

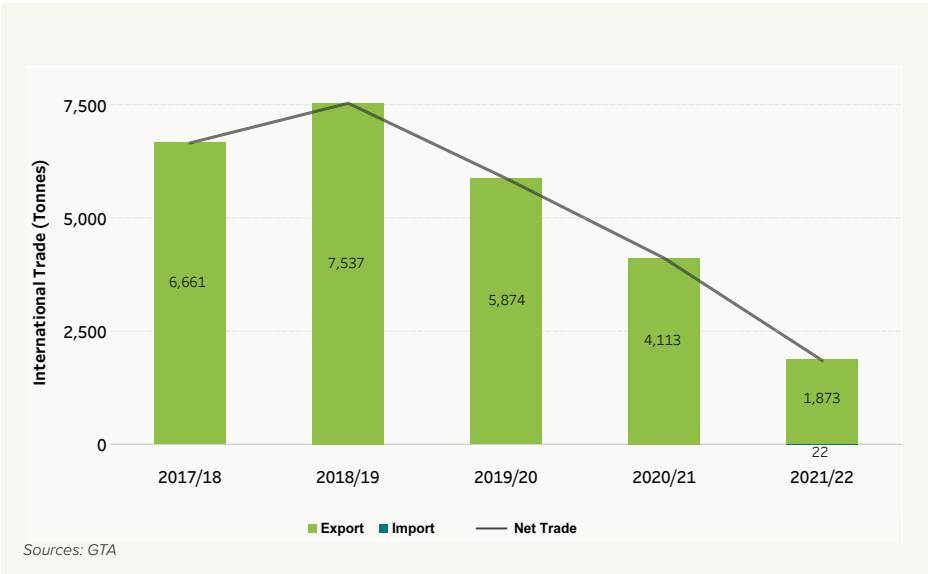
Source: ABS

Fresh Broccoli and Cauliflower International Trade

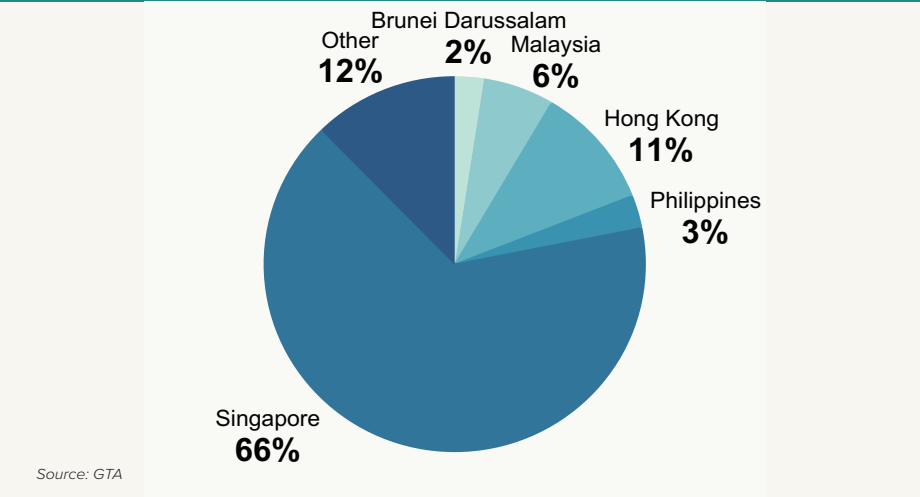
FRESH BROCCOLI AND CAULIFLOWER INTERNATIONAL TRADE

Note: Trade data combines fresh broccoli and cauliflower.

Australia is a net exporter of broccoli and cauliflower. For the year ending June 2022, Australia exported **1,873 tonnes**. The exports and imports over the last five financial years profiled in the graph below.



2021/22 FRESH BROCCOLI AND CAULIFLOWER EXPORTS BY COUNTRY



For the year ending June 2022, **66%** of exported fresh broccoli and cauliflower were sent to **Singapore**, as profiled in the chart above.

FRESH BROCCOLI AND CAULIFLOWER 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	-	-	22	Victoria	1,918	1,358	809
TOTAL	-	-	22	Queensland	2,481	1,616	725
				New South Wales	942	544	234
				Western Australia	485	493	68
				Tasmania	40	102	35
				Other	9	1	1
				TOTAL	5,874	4,113	1,873

FRESH BROCCOLI AND CAULIFLOWER 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
China	-	-	22	Singapore	3,212	2,720	1,233
TOTAL	-	-	22	Hong Kong	329	358	198
				Malaysia	359	283	113
				Philippines	131	15	53
				Brunei	101	99	46
				Other	1,743	638	231
				TOTAL	5,874	4,113	1,873

Source: GTA

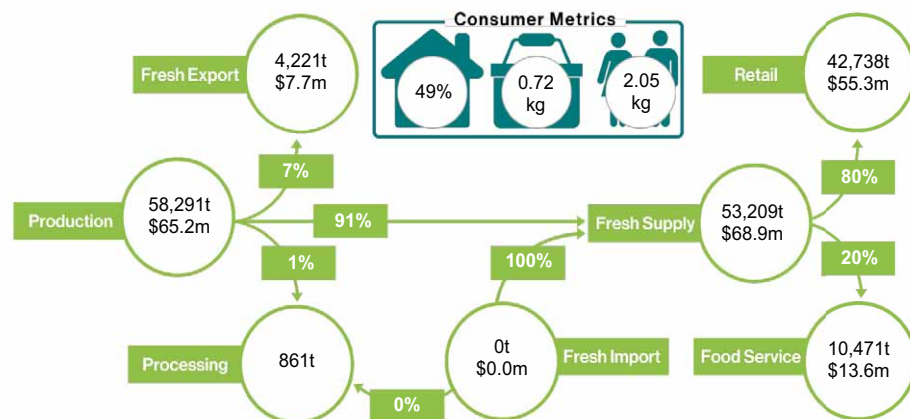
Celery

A photograph of several stalks of fresh celery with their green leaves, arranged on a light green wooden surface. The word "Celery" is overlaid in large white text.



Fresh Celery Overview

FRESH CELERY SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

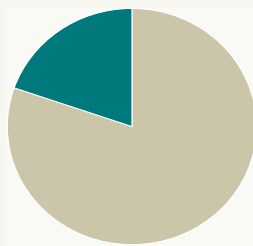
TOTAL PRODUCTION:



\$65.2M

58,291t produced and valued at **\$65.3M** with 1% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 80% ■ Food Service 20%

The wholesale value of the fresh supply was **\$68.9M**, with **\$55.3M** distributed into retail and **\$13.6M** into food service.

CONSUMER METRICS:



49%

49% of Australian households purchased celery, buying an average of **720g** per shopping trip.

PER CAPITA CONSUMPTION:

2.05kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	61,673	65,043	+5%	58,291	-10%
Production (\$m)	\$74.2	\$60.5	-18%	\$65.2	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5,132	4,903	-4%	4,221	-14%
Fresh Export Value (\$m)	\$8.8	\$8.6	-3%	\$7.7	-10%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	55,630	59,179	+6%	53,209	-10%
Fresh Supply Wholesale Value (\$m)	\$78.4	\$62.6	-20%	\$68.9	+10%
Supply per Capita (kg)	2.16	2.30	+7%	2.05	-11%
Retail Supply (t)	45,228	47,725	+6%	42,738	-10%
Retail Supply Wholesale Value (\$m)	\$63.7	\$50.4	-21%	\$55.3	+10%
Food Service Supply (t)	10,402	11,454	+10%	10,471	-9%
Food Service Wholesale Value (\$m)	\$14.7	\$12.1	-17%	\$13.6	+12%

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



Fresh Celery Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

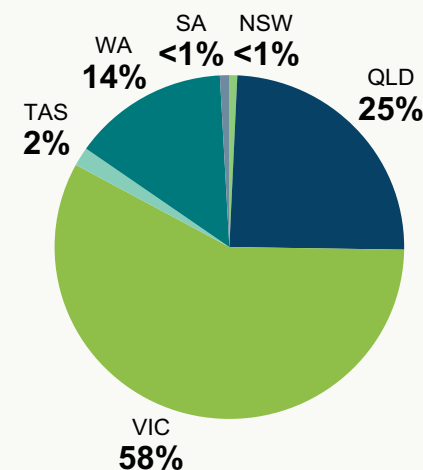
Celery is grown in most states of Australia, with the majority of production occurring in Victoria. Most of the celery grown in Australia is destined for the fresh local market, with a small but growing fresh export market.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CELERY PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH CELERY SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	33,628	\$37.6	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	14,301	\$16.0	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	8,406	\$9.4	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	1,040	\$1.2	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	500	\$0.6	None	None	None	None	None	None	None	None	None	None	None	None
New South Wales	417	\$0.5	None	None	None	None	None	None	None	None	None	None	None	None

Availability legend: High Medium Low None

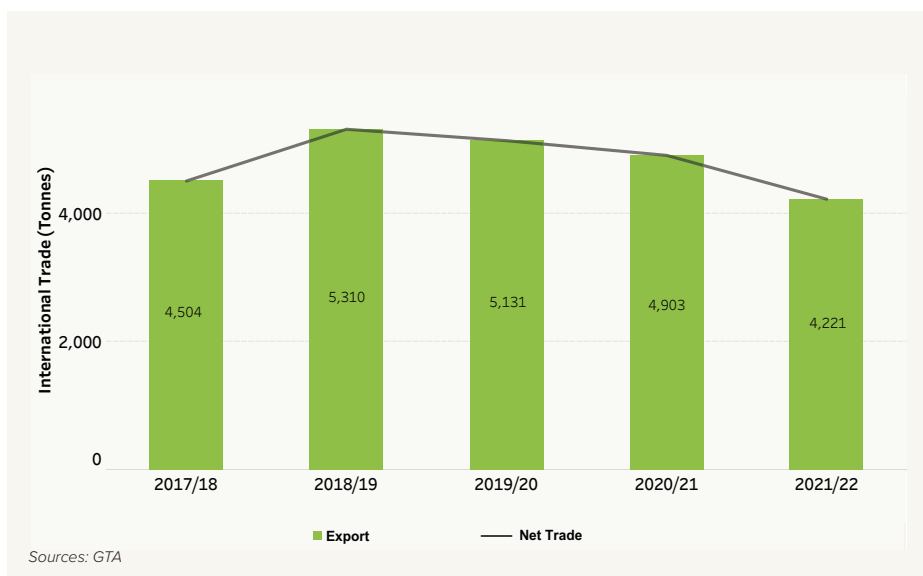
Source: AUSVEG



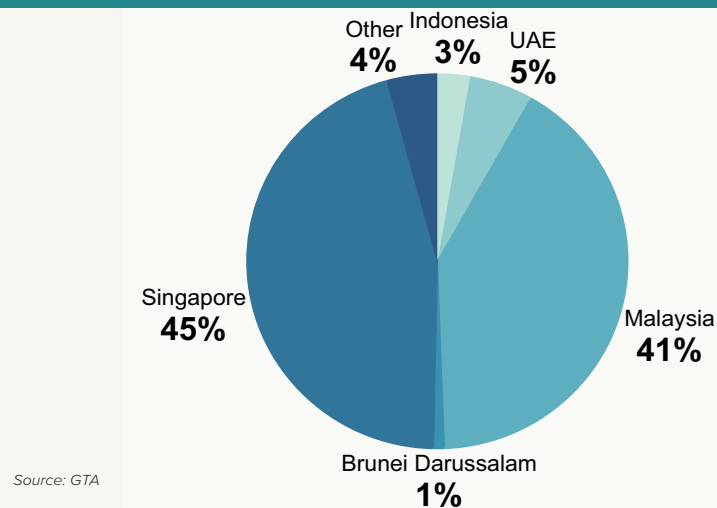
Fresh Celery International Trade

FRESH CELERY INTERNATIONAL TRADE

Australia is a net exporter of celery, with exports grown in recent years. For the year ending in June 2022, Australia exported **4,221 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH CELERY EXPORTS BY COUNTRY



For the year ending June 2022, **45%** of exported fresh celery were sent to **Singapore**, as profiled in the chart above.

FRESH CELERY EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Western Australia	3,095	2,943	2,613
Victoria	1,841	1,658	1,469
New South Wales	87	60	71
Queensland	108	238	64
South Australia	1	3	3
Other	< 0.5	< 0.5	< 0.5
TOTAL	5,131	4,903	4,221

FRESH CELERY EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Singapore	1,927	2,001	1,918
Malaysia	2,084	2,140	1,741
UAE	276	312	229
Indonesia	219	177	115
Brunei	49	50	38
Other	577	224	180
TOTAL	5,131	4,903	4,221

Source: GTA

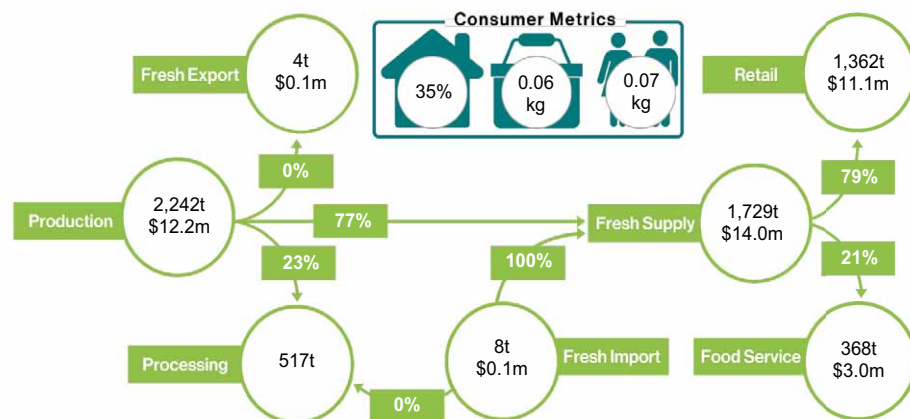
chillies





Fresh Chillies Overview

FRESH CHILLIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

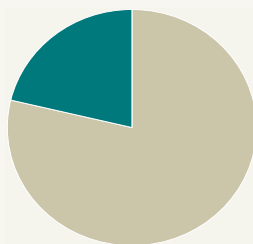
TOTAL PRODUCTION:



\$12.2M

2,242t produced and valued at **\$12.2M** with 23% sent to processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was **\$14M**, with **\$11.1M** distributed into retail and **\$3M** into food service.

CONSUMER METRICS:



35%

35% of Australian households purchased chillies, buying an average of **64g** per shopping trip.

PER CAPITA CONSUMPTION:

0.07kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	2,092	2,064	-1%	2,242	+9%
Production (\$m)	\$8.5	\$9.8	+15%	\$12.2	+25%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5	4	-25%	4	-6%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-32%	< \$0.1	<1%
Fresh Import Volume (t)	7	8	+8%	8	+9%
Fresh Import Value (\$m)	\$0.1	\$0.1	+17%	\$0.1	+11%
Fresh Supply (t)	1,611	1,592	-1%	1,729	+9%
Fresh Supply Wholesale Value (\$m)	\$9.7	\$11.3	+16%	\$14.0	+25%
Supply per Capita (kg)	0.06	0.06	-1%	0.07	+8%
Retail Supply (t)	1,272	1,239	-3%	1,362	+10%
Retail Supply Wholesale Value (\$m)	\$7.7	\$8.8	+14%	\$11.1	+26%
Food Service Supply (t)	339	353	+4%	368	+4%
Food Service Wholesale Value (\$m)	\$2.1	\$2.5	+22%	\$3.0	+20%

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

Fresh Chillies Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

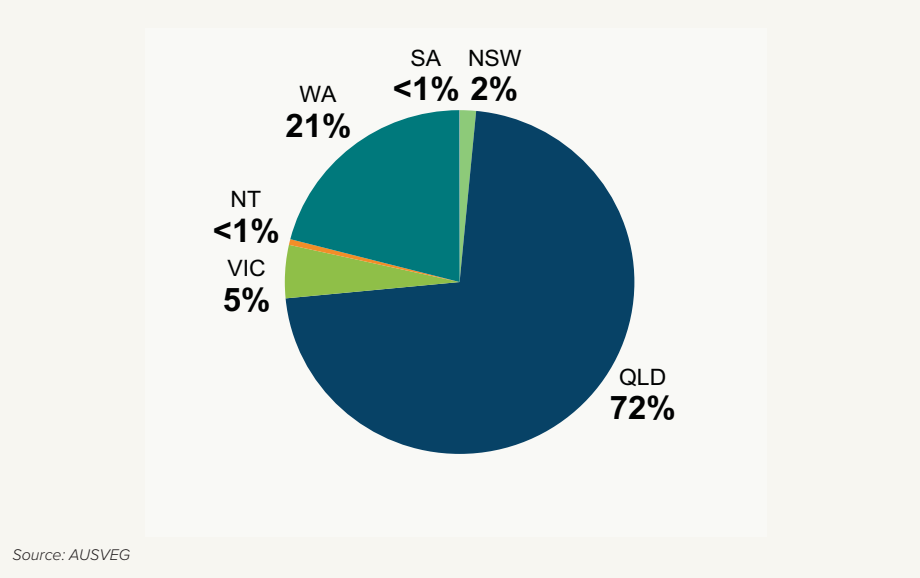
Chillies are grown in most states of Australia. the majority of chillies are grown in Queensland.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CHILLIES PRODUCTION BY STATE



2021/22 FRESH CHILLIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	1,614	\$8.8												
Western Australia	470	\$2.6												
Victoria	112	\$0.6												
New South Wales	34	\$0.2												
Northern Territory	12	\$0.1												

Availability legend: High Medium Low None

Source: AUSVEG

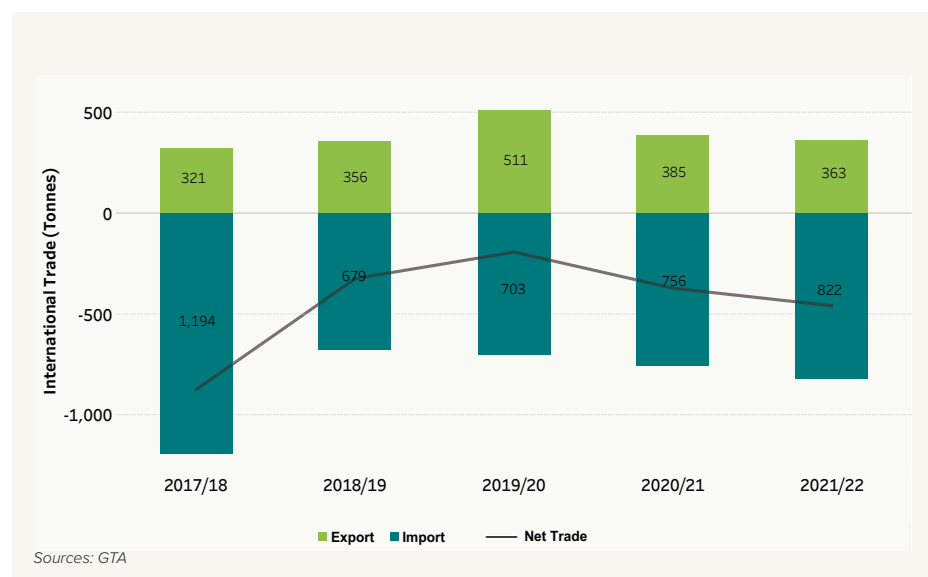


Fresh Capsicums and Chillies International Trade

FRESH CAPSICUMS AND CHILLIES INTERNATIONAL TRADE

Note: Trade data combines fresh capsicums and chillies.

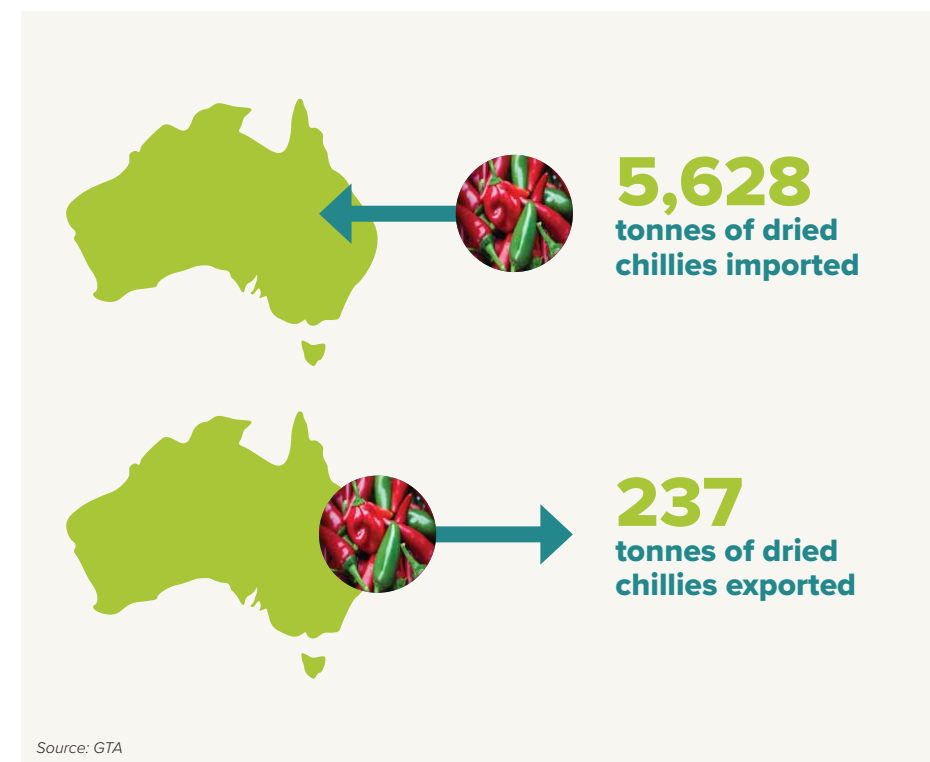
Australia is a net importer of capsicums and chillies, typically importing between **700-1,200 tonnes** every year, predominantly from New Zealand. For the year ending June 2022, Australia exported **363 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Processed Chillies International Trade

2021/22 PROCESSED CHILLIES INTERNATIONAL TRADE

For the year ending June 2022, an additional **5,628 tonnes** of dried chillies were imported, while **237 tonnes** were exported.



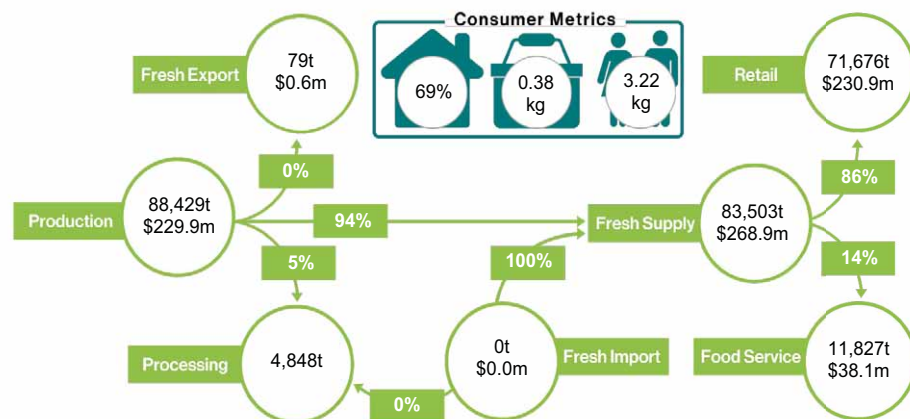
Cucumbers





Fresh Cucumbers Overview

FRESH CUCUMBERS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

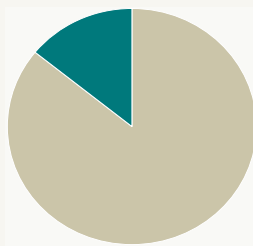
TOTAL PRODUCTION:



\$229.9M

88,429t produced and valued at \$229.9M with 5% sent to be processed.

RETAIL VS FOOD SERVICE:



Retail 86% Food Service 14%

The wholesale value of the fresh supply was \$268.9M, with \$230.9M distributed into retail and \$38.1M into food service.

CONSUMER METRICS:



69%

69% of Australian households purchased cucumbers, buying an average of **380g** per shopping trip.

PER CAPITA CONSUMPTION:

3.22kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	95,723	90,998	-5%	88,429	-3%
Production (\$m)	\$174.1	\$172.7	>-1%	\$229.9	+33%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	81	69	-14%	79	+13%
Fresh Export Value (\$m)	\$0.4	\$0.5	+41%	\$0.6	+11%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	90,652	85,940	-5%	83,503	-3%
Fresh Supply Wholesale Value (\$m)	\$203.8	\$201.9	>-1%	\$268.9	+33%
Supply per Capita (kg)	3.51	3.34	-5%	3.22	-4%
Retail Supply (t)	79,519	73,832	-7%	71,676	-3%
Retail Supply Wholesale Value (\$m)	\$178.8	\$173.5	-3%	\$230.9	+33%
Food Service Supply (t)	11,133	12,108	+9%	11,827	-2%
Food Service Wholesale Value (\$m)	\$25.0	\$28.4	+14%	\$38.1	+34%

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

Fresh Cucumbers Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

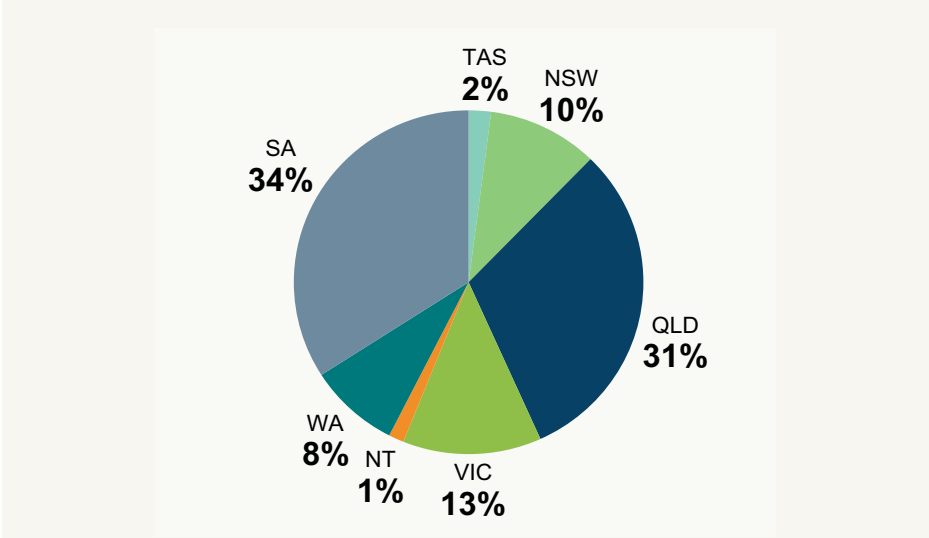
The majority of cucumber production currently occurs in protected cropping, either covered or increasingly in high-tech glasshouses, across Australia, with major volumes grown in South Australia and Queensland.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH CUCUMBERS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH CUCUMBERS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
South Australia	30,113	\$75.0												
Queensland	27,413	\$73.9												
Victoria	11,347	\$32.0												
New South Wales	9,046	\$23.7												
Western Australia	7,460	\$17.7												
Tasmania	1,812	\$5.0												
Northern Territory	1,238	\$2.6												

Availability legend: High Medium Low None

Source: AUSVEG

MAIN CUCUMBERS VARIETIES

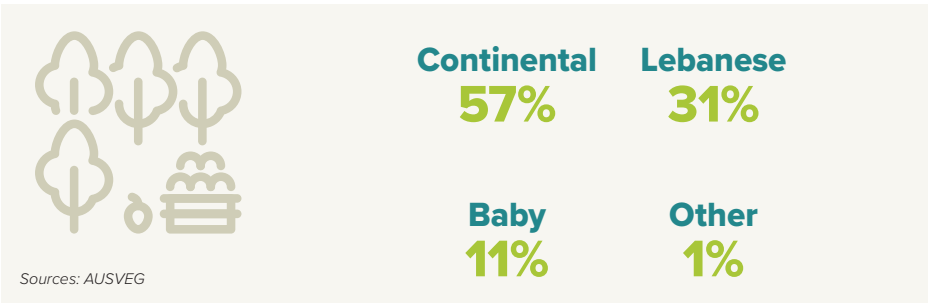
There are currently three main varieties grown in Australia. These include:

Continental cucumbers, also known as Telegraph cucumbers, the most common variety in Australia. Continental cucumbers accounted for **57%** of fresh production for the year ending June 2022.

Lebanese cucumbers, a small cucumber with bumpy ridged skin. Lebanese cucumbers accounted for **31%** of fresh production.

Baby cucumbers, including the trademarked Qukes™, accounted for **11%** of fresh production.

Other varieties, including white and apple cucumbers, accounted for **1%** of fresh production.



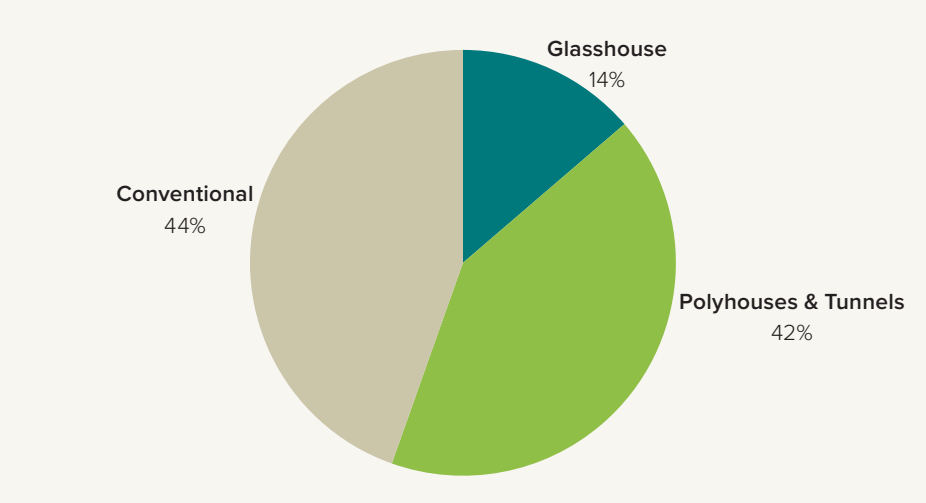
2021/22 FRESH CUCUMBERS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Continental	51,454	High	Medium	Medium	High	High	High	High	High	Medium	Medium	Medium	Medium
Lebanese	27,413	Low	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Baby	8,679	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Other	884	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Sources: AUSVEG

2021/22 FRESH CUCUMBERS PRODUCTION BY SYSTEM



Production of cucumbers in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 14%**, **Polyhouses & Tunnels 42%** and **Conventional 44%**.

2021/22 FRESH CUCUMBERS PRODUCTION SYSTEM BY STATE

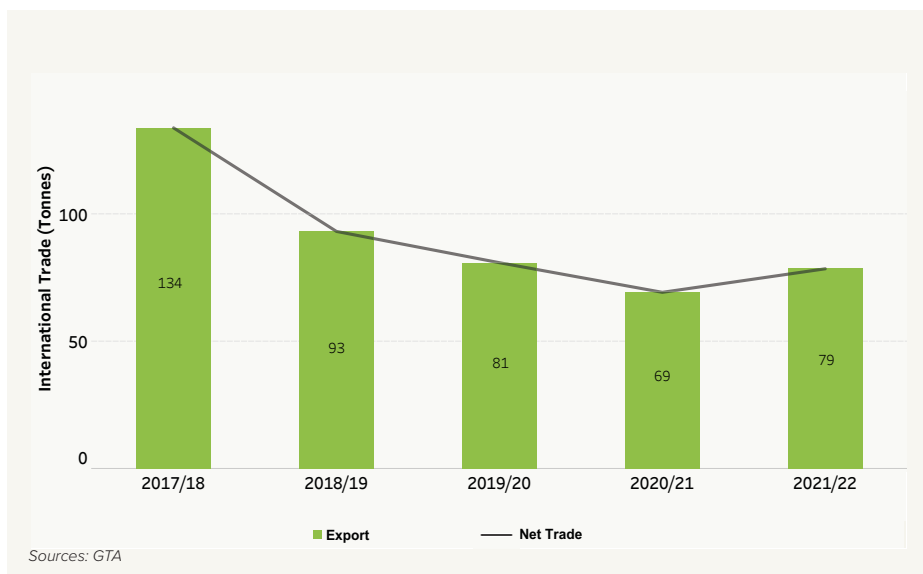
State	Glasshouse			Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	0	0	\$-	13	6,500	\$18.7	-	2,546	\$4.9
Victoria	2	800	\$2.8	22	9,515	\$27.4	-	1,032	\$1.8
Queensland	12	9,600	\$33.7	8	4,000	\$11.5	-	13,813	\$28.6
Western Australia	0	0	\$-	5	2,500	\$7.2	-	4,960	\$10.5
South Australia	3	1,320	\$4.6	31	13,375	\$38.5	-	15,418	\$31.8
Tasmania	1	400	\$1.4	2	1,000	\$2.9	-	412	\$0.7
Northern Territory	0	0	\$-	0	0	\$-	-	1,238	\$2.6



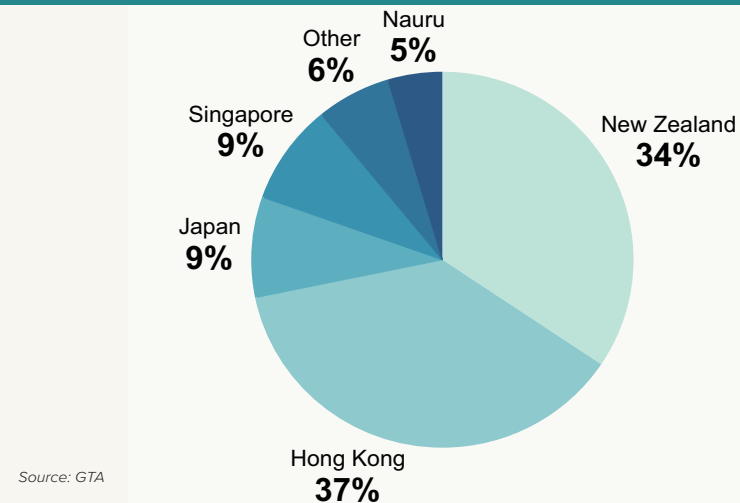
Fresh Cucumbers International Trade

FRESH CUCUMBERS INTERNATIONAL TRADE

Australia is a net exporter of fresh cucumbers, typically exporting **60-130 tonnes** every year. For the year ending June 2022, Australia exported **79 tonnes**. The exports and imports over the last five financial years profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH CUCUMBERS EXPORTS BY COUNTRY



For the year ending June 2022, **37%** of exported fresh cucumbers were sent to **Hong Kong**, as profiled in the chart above.

FRESH CUCUMBERS EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Queensland	57	20	32
Victoria	14	37	28
New South Wales	9	11	13
South Australia	-	1	6
Northern Territory	-	< 0.5	< 0.5
Other	1	< 0.5	< 0.5
TOTAL	81	69	79

FRESH CUCUMBERS EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Hong Kong	15	38	29
New Zealand	48	14	27
Japan	< 0.5	-	7
Singapore	2	7	7
Nauru	4	3	4
Other	12	7	5
TOTAL	81	69	79

Source: GTA

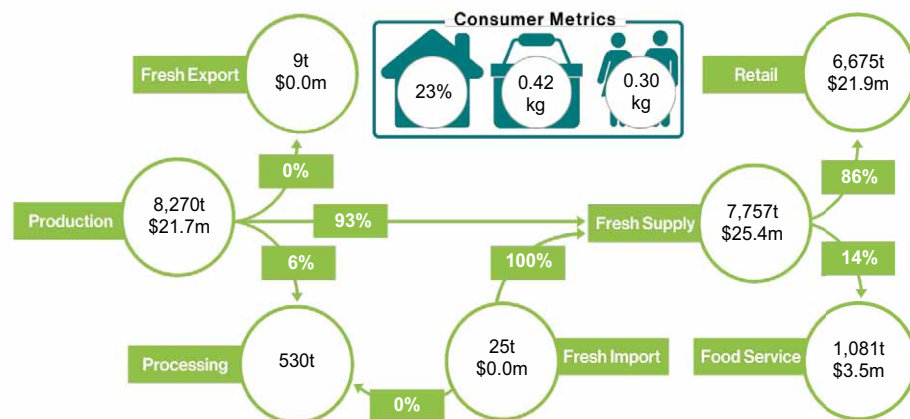
Eggplants





Fresh Eggplants Overview

FRESH EGGPLANTS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

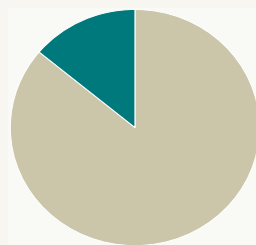
TOTAL PRODUCTION:



\$21.7M

8,270t produced and valued at **\$21.7M** with 6% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was **\$25.4M**, with **\$21.9M** distributed into retail and **\$3.5M** into food service.

CONSUMER METRICS:



23% of Australian households purchased eggplants, buying an average of **421g** per shopping trip.

PER CAPITA CONSUMPTION:



0.30kg

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	10,557	9,177	-13%	8,270	-10%
Production (\$m)	\$21.1	\$21.4	+1%	\$21.7	+1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	7	9	+21%	9	>-1%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	+52%	< \$0.1	-3%
Fresh Import Volume (t)	-	-	-	25	-
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	9,873	8,580	-13%	7,757	-10%
Fresh Supply Wholesale Value (\$m)	\$24.7	\$25.0	+1%	\$25.4	+2%
Supply per Capita (kg)	0.38	0.33	-13%	0.30	-10%
Retail Supply (t)	8,585	7,397	-14%	6,675	-10%
Retail Supply Wholesale Value (\$m)	\$21.5	\$21.5	<1%	\$21.9	+2%
Food Service Supply (t)	1,288	1,183	-8%	1,081	-9%
Food Service Wholesale Value (\$m)	\$3.2	\$3.4	+7%	\$3.5	+3%

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

Fresh Eggplants Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

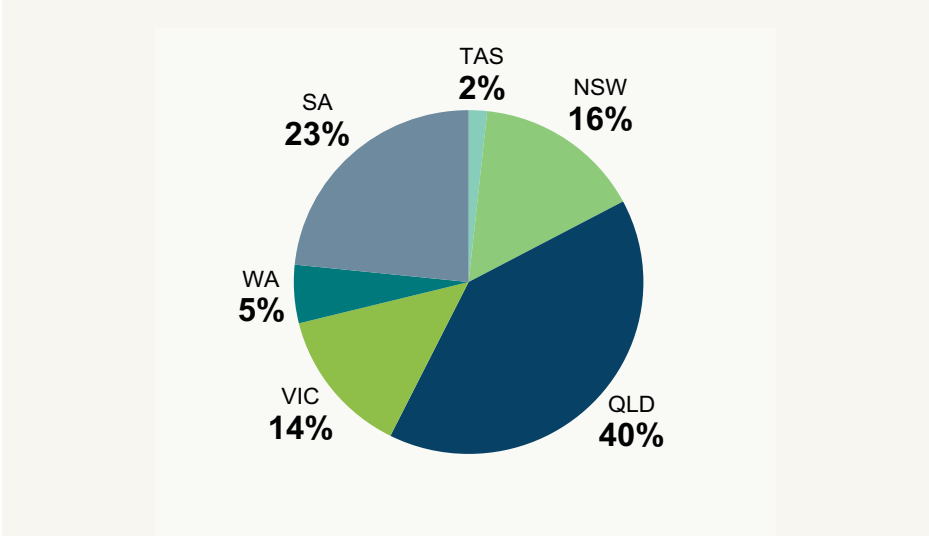
Eggplants are grown in most states of Australia, with the majority of production occurring along the east coast. Currently, most eggplants are grown outdoors. However, increasing volumes are being grown year-round in high-tech greenhouses in the southern states.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH EGGPLANTS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH EGGPLANTS SEASONALITY BY STATE

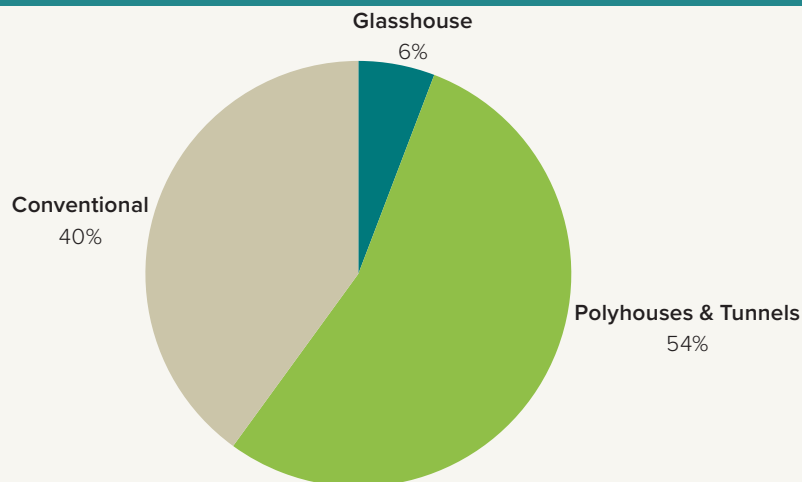
State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	3,321	\$8.5	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	1,934	\$5.5	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	1,285	\$3.2	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	1,139	\$3.1	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	452	\$1.2	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	140	\$0.3	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: AUSVEG



2021/22 FRESH EGGPLANTS PRODUCTION BY SYSTEM



Production of eggplants in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 6%**, **Polyhouses & Tunnels 54%** and **Conventional 40%**.

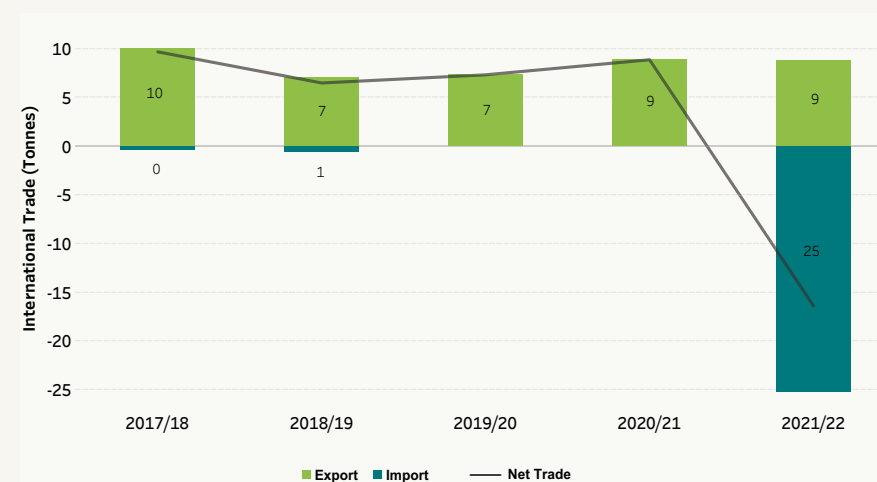
2021/22 FRESH EGGPLANTS PRODUCTION SYSTEM BY STATE

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	0	0	\$-	2	583	\$1.7	-	702	\$1.5
Victoria	0	0	\$-	3	900	\$2.7	-	239	\$0.4
Queensland	1	480	\$1.7	3	900	\$2.7	-	1,941	\$4.1
Western Australia	0	0	\$-	1	300	\$0.9	-	152	\$0.3
South Australia	0	0	\$-	6	1,800	\$5.4	-	134	\$0.1
Tasmania	0	0	\$-	0	0	\$-	-	140	\$0.3
Northern Territory	0	0	\$-	0	0	\$-	-	0	\$-

Fresh Eggplants International Trade

FRESH EGGPLANTS INTERNATIONAL TRADE

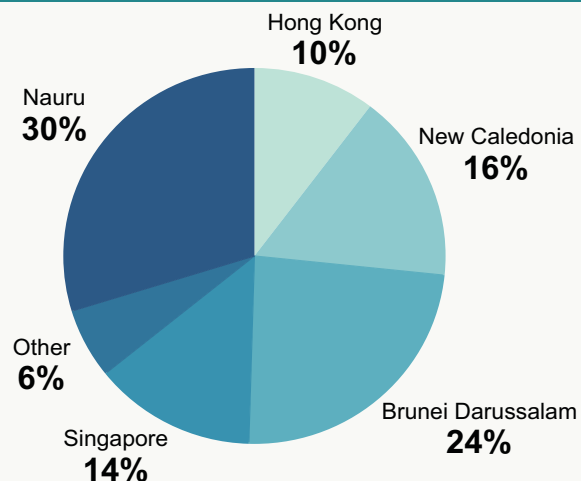
There is minimal trade of eggplants, with Australia typically exporting **7-10 tonnes** every year. For the year ending June 2022, Australia exported **9 tonnes** and imported **25 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH EGGPLANTS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **30%** of exported fresh eggplants were sent to **Nauru**, as profiled in the chart above.

FRESH EGGPLANTS 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
New South Wales	-	-	25	Queensland	3	5	5
TOTAL	-	-	25	New South Wales	3	2	2
				Victoria	1	1	1
				South Australia	1	< 0.5	1
				Other	< 0.5	< 0.5	-
				TOTAL	7	9	9

FRESH EGGPLANTS 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
Egypt	-	-	25	Nauru	3	2	3
TOTAL	-	-	25	Brunei	< 0.5	2	2
				New Caledonia	-	1	1
				Singapore	1	2	1
				Hong Kong	2	2	1
				Other	1	< 0.5	1
				TOTAL	7	9	9

Source: GTA

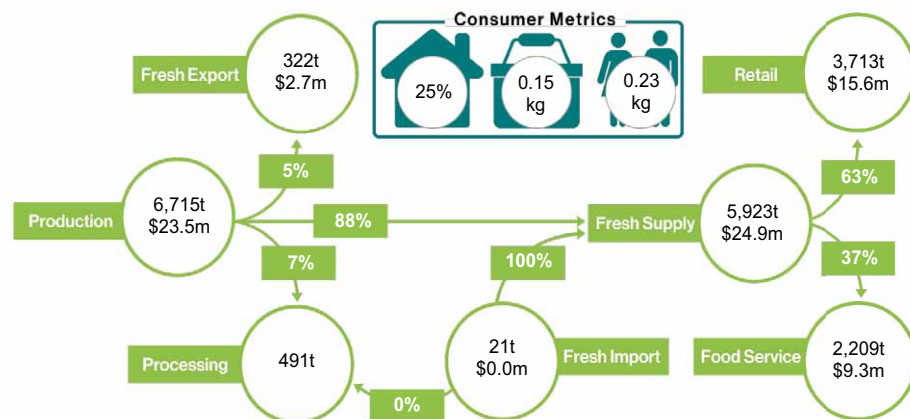


English Spinach/ Silverbeet/Kale



Fresh English Spinach/Silverbeet/Kale Overview

FRESH ENGLISH SPINACH/SILVERBEET/KALE SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

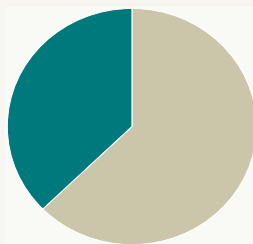
TOTAL PRODUCTION:



\$23.5M

6,715t produced and valued at **\$23.5M** with 7% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 63% ■ Food Service 37%

The wholesale value of the fresh supply was **\$24.9M**, with **\$15.6M** distributed into retail and **\$9.3M** into food service.

CONSUMER METRICS:



25%

25% of Australian households purchased english spinach/silverbeet/kale, buying an average of **151g** per shopping trip.

PER CAPITA CONSUMPTION:

0.23kg



in 2021/22 based on the volume supplied.

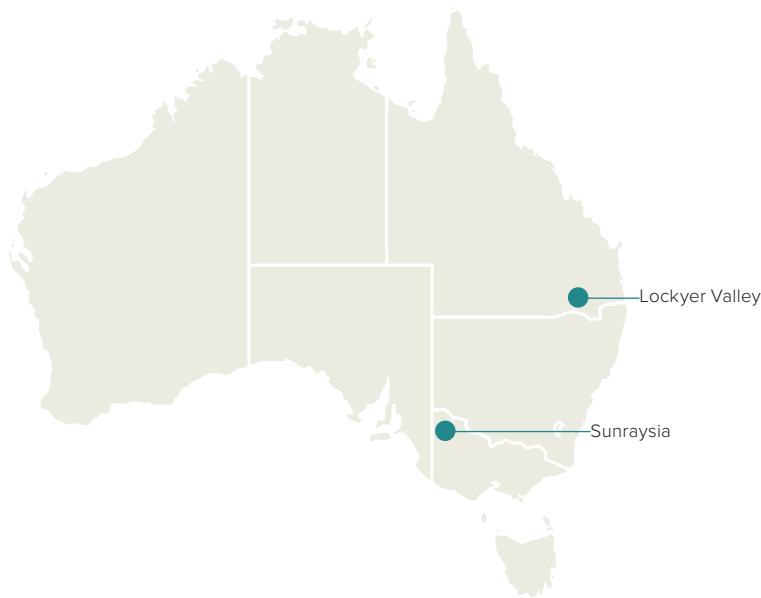
YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	7,080	6,925	-2%	6,715	-3%
Production (\$m)	\$19.9	\$22.2	+12%	\$23.5	+6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	256	262	+2%	322	+23%
Fresh Export Value (\$m)	\$2.5	\$2.7	+8%	\$2.7	>-1%
Fresh Import Volume (t)	<1	6	>100%	21	>100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	< \$0.1	-33%
Fresh Supply (t)	6,306	6,162	-2%	5,923	-4%
Fresh Supply Wholesale Value (\$m)	\$20.7	\$23.3	+12%	\$24.9	+7%
Supply per Capita (kg)	0.24	0.24	-2%	0.23	-5%
Retail Supply (t)	4,068	3,876	-5%	3,713	-4%
Retail Supply Wholesale Value (\$m)	\$13.3	\$14.6	+10%	\$15.6	+7%
Food Service Supply (t)	2,238	2,287	+2%	2,209	-3%
Food Service Wholesale Value (\$m)	\$7.3	\$8.6	+18%	\$9.3	+7%

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



Fresh English Spinach/Silverbeet/Kale Production

MAJOR PRODUCTION AREAS

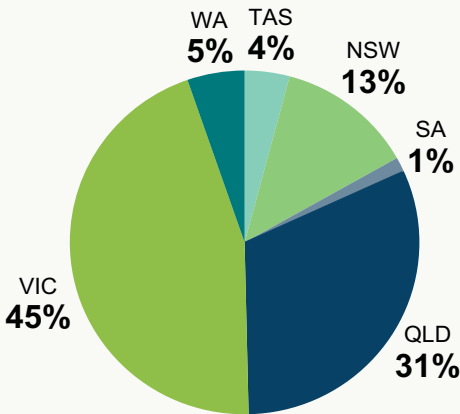


Source: AUSVEG

This section combines information on English spinach, silverbeet and kale. These categories are produced in most states of Australia.



2021/22 FRESH ENGLISH SPINACH/SILVERBEET/KALE PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH ENGLISH SPINACH/SILVERBEET/KALE SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	3,027	\$10.6	High	High	Medium	Medium	Medium	High	High	High	Medium	Medium	Medium	High
Queensland	2,113	\$7.4	Medium	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	852	\$3.0	Medium	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	355	\$1.2	Medium	Medium	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Tasmania	279	\$1.0	None	None	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	None
South Australia	91	\$0.3	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

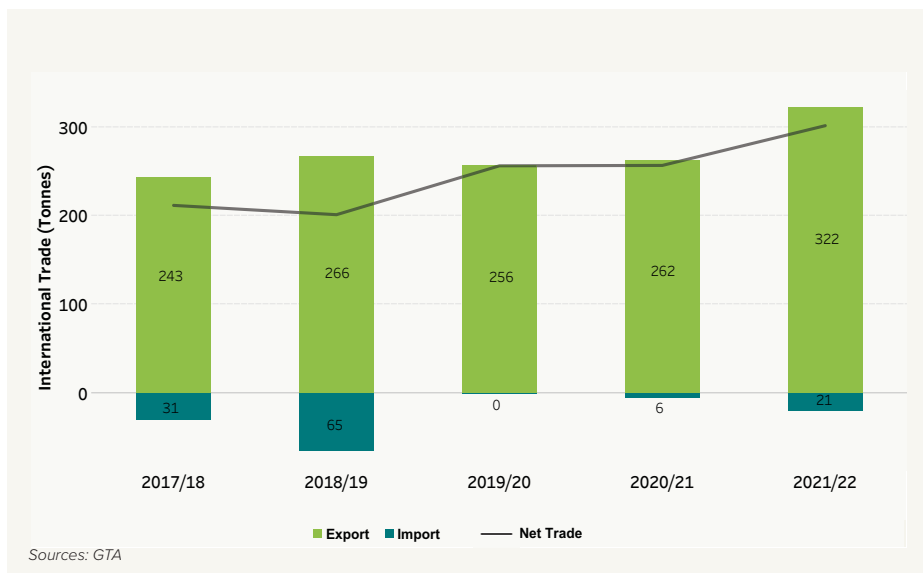
Source: AUSVEG



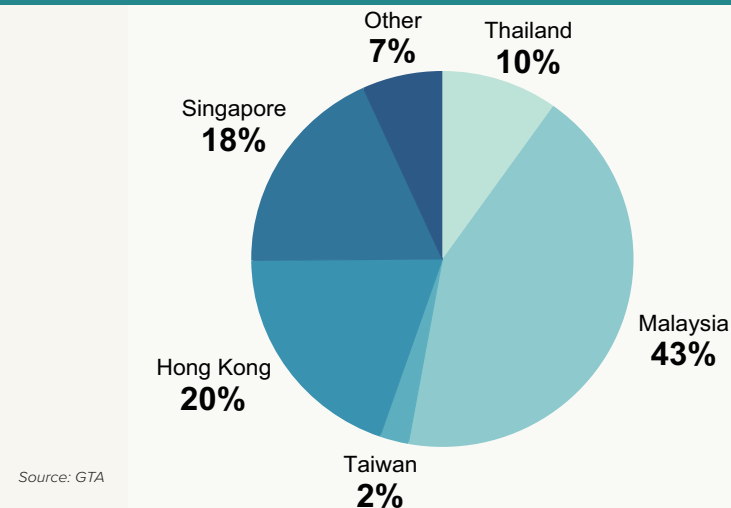
Fresh English Spinach/Kale International Trade

FRESH ENGLISH SPINACH/KALE INTERNATIONAL TRADE

There is minimal trade of fresh English spinach, although Australia's exports have been increasing recently. There is no trade in fresh silverbeet. For the year ending in June 2022, Australia exported **322 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH ENGLISH SPINACH EXPORTS BY COUNTRY



For the year ending June 2022, **43%** of exported fresh English spinach were sent to **Malaysia**, as profiled in the chart above.

FRESH ENGLISH SPINACH 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	< 0.5	-	21	Victoria	230	229	205
Western Australia	-	4	-	Western Australia	11	15	77
South Australia	-	2	-	Queensland	3	8	20
Other	< 0.5	-	-	New South Wales	12	8	14
TOTAL	0	6	21	South Australia	-	2	5
				Other	-	< 0.5	< 0.5
				TOTAL	256	262	322

FRESH ENGLISH SPINACH 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
US	-	-	21	Malaysia	49	68	139
India	-	4	-	Hong Kong	46	31	63
Spain	-	2	-	Singapore	83	92	59
Hong Kong	< 0.5	-	-	Thailand	27	31	32
Other	< 0.5	-	-	Taiwan	3	1	8
TOTAL	0	6	21	Other	48	39	22
				TOTAL	256	262	322

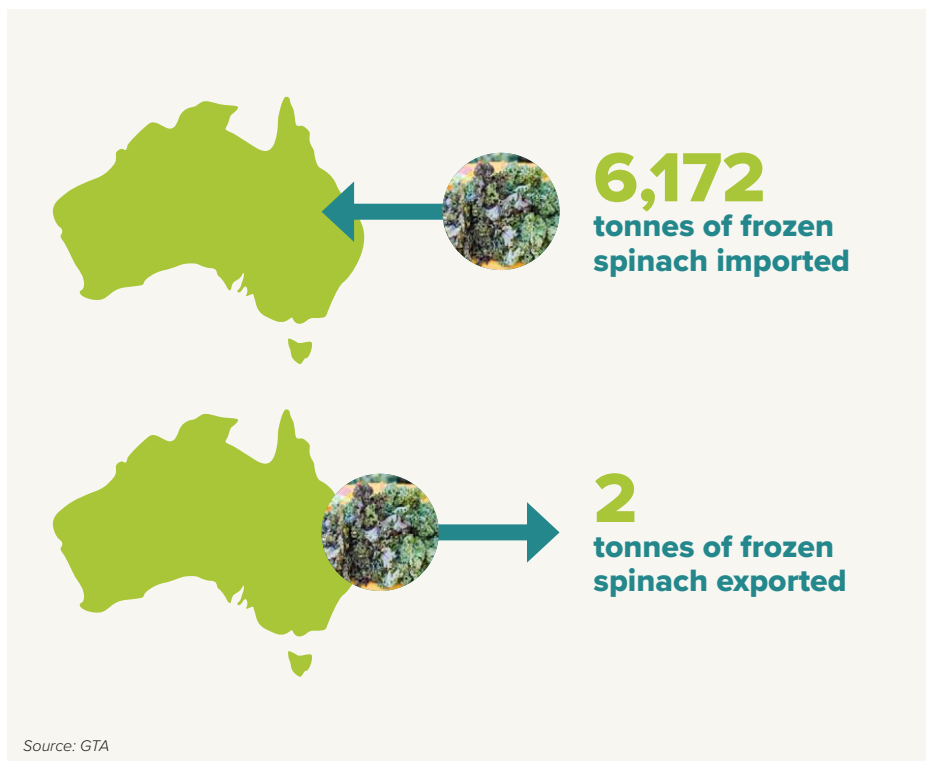
Source: GTA



Processed Spinach International Trade

2021/22 PROCESSED SPINACH INTERNATIONAL TRADE

For the year ending June 2022, an additional **6,172 tonnes** of frozen spinach was imported, while **two tonnes** were exported.

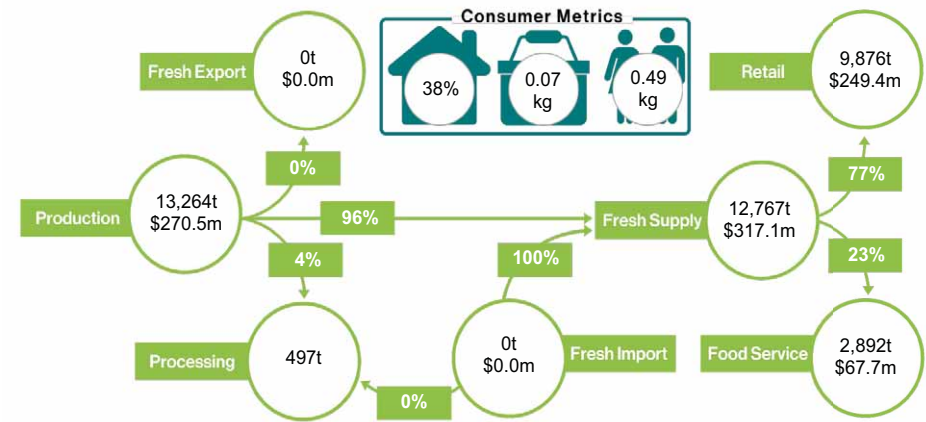




Fresh Herbs - Overview

Fresh Herbs Overview

FRESH HERBS SUPPLY CHAIN – YEAR ENDING JUNE 2022

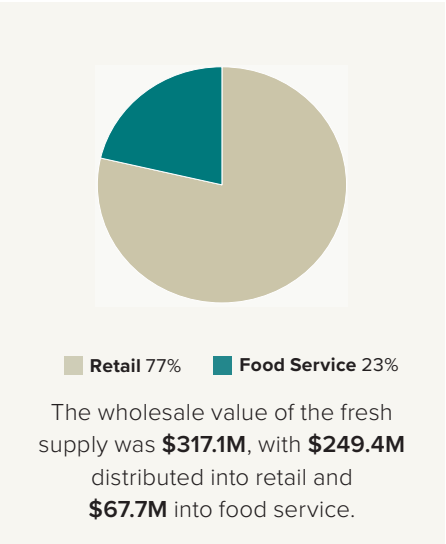


Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	13,572	13,802	+2%	13,264	-4%
Production (\$m)	\$235.8	\$229.8	-3%	\$270.5	+18%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	13,063	13,285	+2%	12,767	-4%
Fresh Supply Wholesale Value (\$m)	\$276.4	\$269.4	-3%	\$317.1	+18%
Supply per Capita (kg)	0.51	0.52	+2%	0.49	-5%
Retail Supply (t)	10,446	10,299	-1%	9,876	-4%
Retail Supply Wholesale Value (\$m)	\$225.1	\$212.5	-6%	\$249.4	+17%
Food Service Supply (t)	2,617	2,986	+14%	2,892	-3%
Food Service Wholesale Value (\$m)	\$51.3	\$56.9	+11%	\$67.7	+19%

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

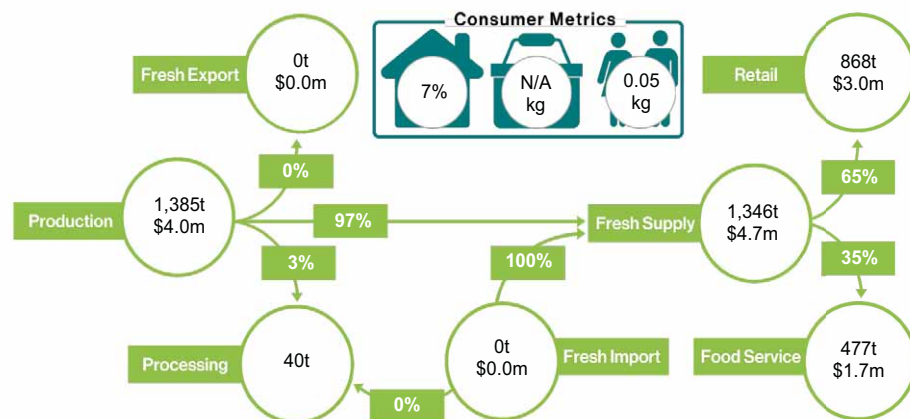


Fresh Herbs - Fennel



Fresh Fennel Overview

FRESH FENNEL SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

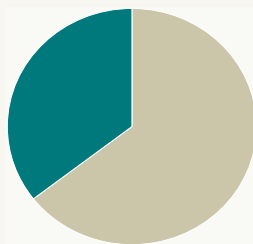
TOTAL PRODUCTION:



\$4.0M

1,365t produced and valued at **\$4.0M** with 3% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 64% ■ Food Service 35%

The wholesale value of the fresh supply was **\$4.7M**, with **\$3.0M** distributed into retail and **\$1.7M** into food service.

CONSUMER METRICS:



7%

7% of Australian households purchased fennel.

PER CAPITA CONSUMPTION:

0.05kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	1,345	1,380	+3%	1,385	<1%
Production (\$m)	\$2.7	\$2.7	+2%	\$4.0	+46%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	1,306	1,340	+3%	1,346	<1%
Fresh Supply Wholesale Value (\$m)	\$3.1	\$3.2	+2%	\$4.7	+46%
Supply per Capita (kg)	0.05	0.05	+3%	0.05	>-1%
Retail Supply (t)	848	857	<1%	868	+1%
Retail Supply Wholesale Value (\$m)	\$2.0	\$2.1	<1%	\$3.0	+47%
Food Service Supply (t)	458	484	+6%	477	-1%
Food Service Wholesale Value (\$m)	\$1.1	\$1.2	+5%	\$1.7	+43%

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



Fresh Fennel Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

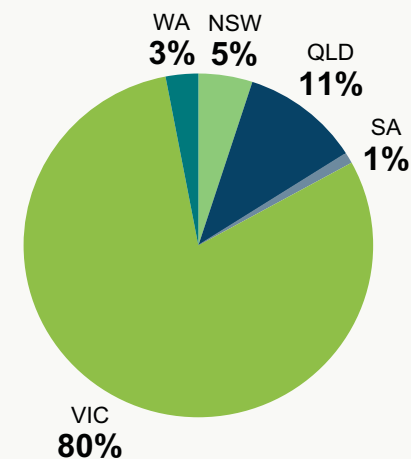
Production of fennel occurs mostly in Victoria, with the majority of production being used in the fresh market.

PRODUCTION WINDOW:



Nov-Mar

2021/22 FRESH FENNEL PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH FENNEL SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,108	\$3.2	High	High	High	High	High	Medium	Medium	Medium	Low	Low	Low	Low
Queensland	152	\$0.4	High	High	High	High	High	Medium	Medium	Medium	Low	Low	Low	Low
New South Wales	69	\$0.2	High	High	High	High	High	Medium	Medium	Medium	Low	Low	Low	Low
Western Australia	42	\$0.1	High	High	High	Medium	Medium	Medium	Medium	Medium	Low	Low	Low	Low
South Australia	14	\$0.0	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Low	Low	Low	Low

Availability legend: High Medium Low None

Source: AUSVEG

Fresh Herbs -

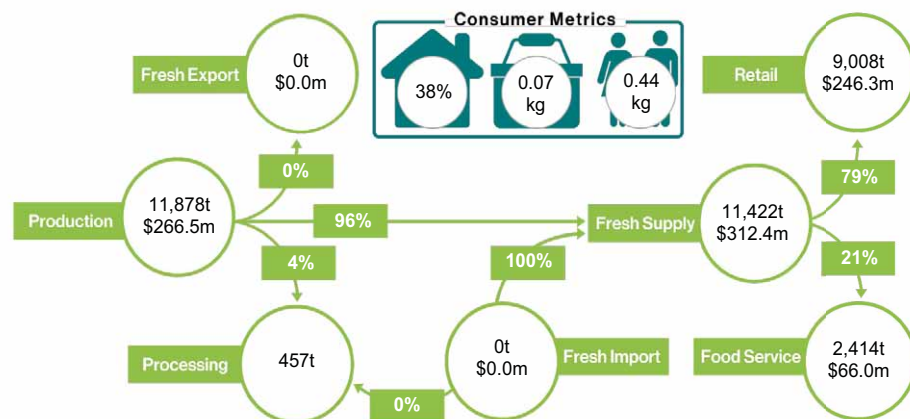
Parsley and other Fresh Herbs





Fresh Parsley and other Fresh Herbs Overview

FRESH PARSLEY AND OTHER FRESH HERBS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

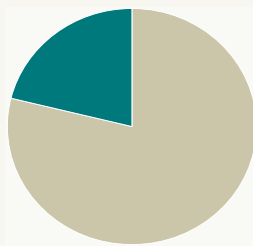
TOTAL PRODUCTION:



\$266.5M

11,878t produced and valued at \$266.5M with 4% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was \$312.4M, with \$246.3M distributed into retail and \$66.0M into food service.

CONSUMER METRICS:



38%

38% of Australian households purchased parsley and other fresh herbs, buying an average of 69g per shopping trip.

PER CAPITA CONSUMPTION:

0.44kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	12,227	12,422	+2%	11,878	-4%
Production (\$m)	\$233.1	\$227.1	-3%	\$266.5	+17%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	11,757	11,944	+2%	11,422	-4%
Fresh Supply Wholesale Value (\$m)	\$273.3	\$266.2	-3%	\$312.4	+17%
Supply per Capita (kg)	0.46	0.46	+2%	0.44	-5%
Retail Supply (t)	9,597	9,442	-2%	9,008	-5%
Retail Supply Wholesale Value (\$m)	\$223.1	\$210.4	-6%	\$246.3	+17%
Food Service Supply (t)	2,159	2,502	+16%	2,414	-4%
Food Service Wholesale Value (\$m)	\$50.2	\$55.8	+11%	\$66.0	+18%

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

Fresh Parsley and other Fresh Herbs Production

MAJOR PRODUCTION AREAS

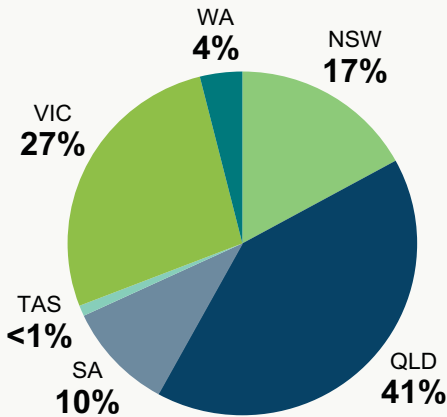


Source: AUSVEG

Fresh herbs, including parsley, are grown in most states of Australia, typically in market near the major capitals. Increasingly volumes are being grown year-round in high tech greenhouses in New South Wales.



2021/22 FRESH PARSLEY AND OTHER FRESH HERBS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH PARSLEY AND OTHER FRESH HERBS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	4,870	\$99.4												
Victoria	3,207	\$73.8												
New South Wales	2,019	\$44.9												
South Australia	1,200	\$35.6												
Western Australia	463	\$10.4												
Tasmania	119	\$2.4												

Availability legend: High Medium Low None

Source: AUSVEG



MAIN PARSLEY AND OTHER FRESH HERBS VARIETIES

There are a large number of fresh herbs varieties grown in Australia. Some of the major varieties include:

Coriander, a small leafed fresh herb. Coriander accounted for **28%** of fresh production.

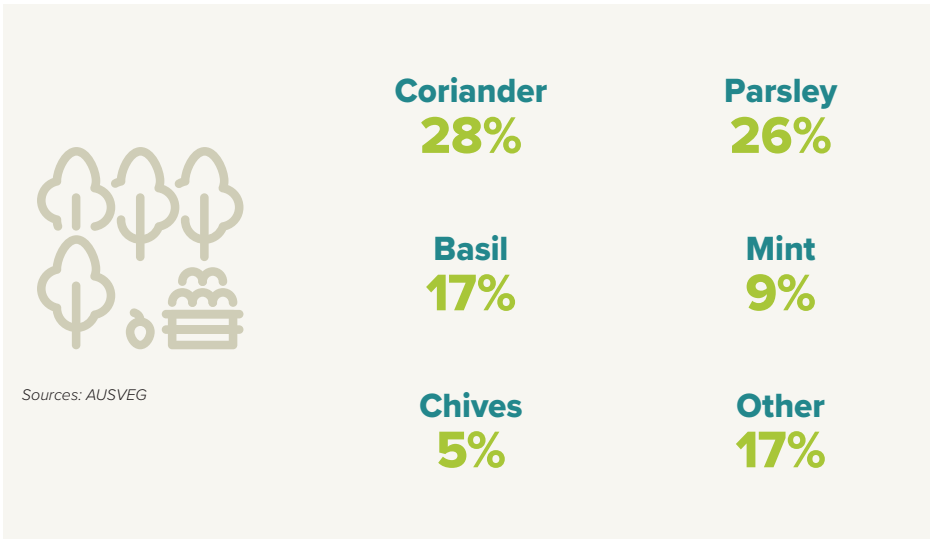
Parsley, including continental and curley-leaf parsley. Parsley accounted for **26%** of fresh production.

Basil, a large flat leafed fresh herb, accounted for **17%** of fresh production.

Mint, a smaller leafed fresh herb, accounted for **9%** of fresh production.

Chives, including garlic chives, a long thin fresh herb, accounted for **5%** of fresh production.

Other varieties accounted for **17%** of fresh production.



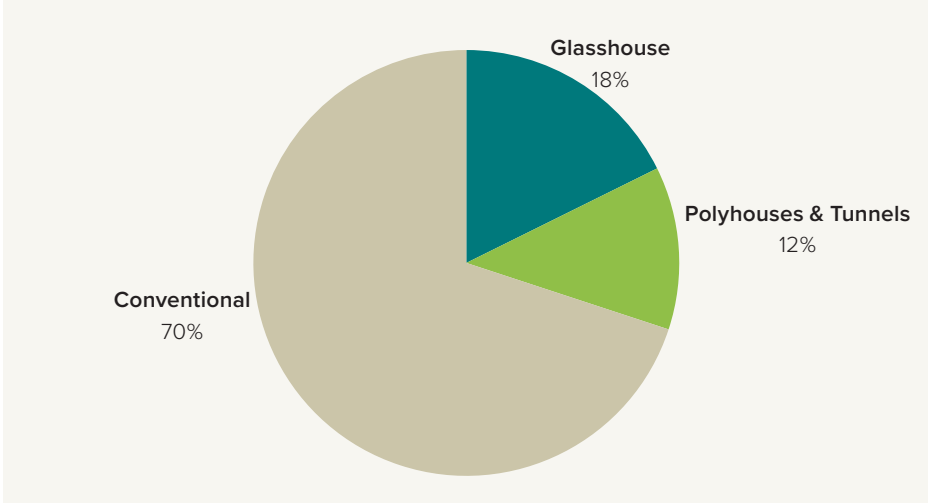
2021/22 FRESH PARSLEY AND OTHER FRESH HERBS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Coriander	3,267	Low	Low	Low	High	High	High	High	Medium	Low	Low	Low	Low
Parsley	3,029	Low	Low	Low	High	High	High	Medium	Medium	Medium	Low	Low	Low
Basil	1,960	Low	Low	Low	Low	High	High	Medium	Low	Low	Low	Low	Low
Mint	1,069	Low	Low	Low	High	Medium	Medium	Medium	Medium	Low	Low	Low	Low
Chives	535	Low	Low	Low	Low	Medium	Medium	Low	Low	Low	Low	Low	Low
Other	2,019	Low	Low	Low	Low	High	Medium	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None
Sources: AUSVEG



2021/22 FRESH PARSLEY AND OTHER FRESH HERBS PRODUCTION BY SYSTEM



Production of parsley and other fresh herbs in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 18%, Polyhouses & Tunnels 12%** and **Conventional 70%**.

2021/22 FRESH PARSLEY AND OTHER FRESH HERBS 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	2	300	\$9.3	3	300	\$7.4	-	1,419	\$28.2
Victoria	5	675	\$20.9	6	600	\$14.8	-	1,932	\$38.1
Queensland	0	0	\$-	3	300	\$7.4	-	4,570	\$92.0
Western Australia	0	0	\$-	3	270	\$6.7	-	193	\$3.7
South Australia	8	1,125	\$34.9	0	0	\$-	-	75	\$0.7
Tasmania	0	0	\$-	0	0	\$-	-	119	\$2.4
Northern Territory	0	0	\$-	0	0	\$-	-	0	\$-

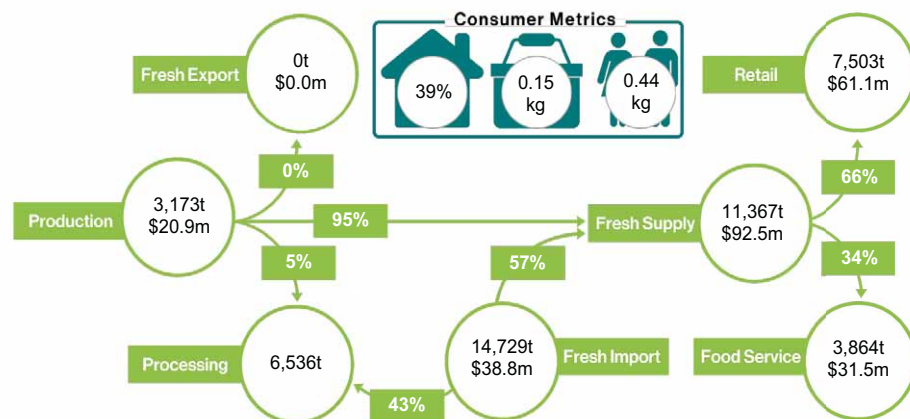
Garlic





Fresh Garlic Overview

FRESH GARLIC SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: AC; Australian Garlic Industry Association (AGIA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

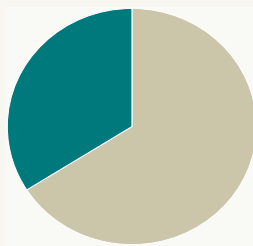
TOTAL PRODUCTION:



\$20.9M

3,173t produced and valued at **\$20.9M** with 5% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 66% ■ Food Service 34%

The wholesale value of the fresh supply was **\$93.5M**, with **\$61.1M** distributed into retail and **\$31.5M** into food service.

CONSUMER METRICS:



39%

39% of Australian households purchased garlic, buying an average of **154g** per shopping trip.

PER CAPITA CONSUMPTION:

0.44kg



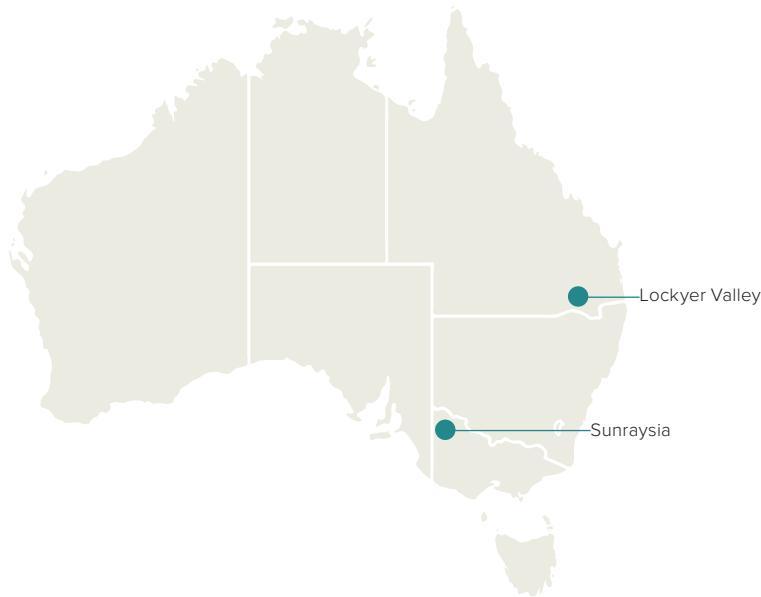
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	2,926	3,004	+3%	3,173	+6%
Production (\$m)	\$21.6	\$19.8	-9%	\$20.9	+6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	13,562	13,966	+3%	14,729	+5%
Fresh Import Value (\$m)	\$41.6	\$34.4	-17%	\$38.8	+13%
Fresh Supply (t)	10,571	10,180	-4%	11,367	+12%
Fresh Supply Wholesale Value (\$m)	\$96.6	\$83.1	-14%	\$92.5	+11%
Supply per Capita (kg)	0.41	0.40	-4%	0.44	+11%
Retail Supply (t)	7,216	6,719	-7%	7,503	+12%
Retail Supply Wholesale Value (\$m)	\$65.9	\$54.9	-17%	\$61.1	+11%
Food Service Supply (t)	3,355	3,460	+3%	3,864	+12%
Food Service Wholesale Value (\$m)	\$30.7	\$28.3	-8%	\$31.5	+11%

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

Fresh Garlic Production

MAJOR PRODUCTION AREAS



Source: AGIA

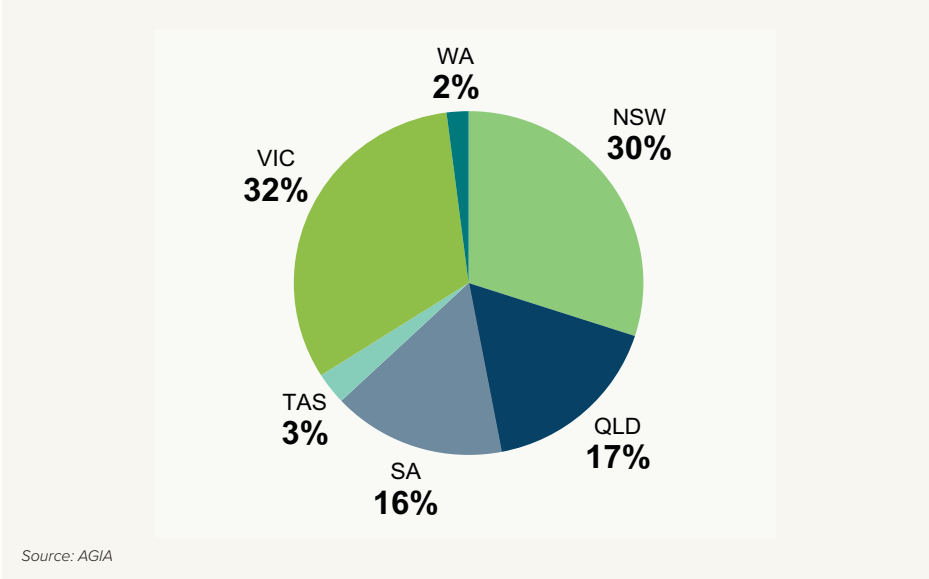
Australia has a small but growing garlic industry, with the majority of current fresh supply being sourced from imports. Garlic is grown around Australia, with significant volumes produced in Victoria, New South Wales and Queensland.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH GARLIC PRODUCTION BY STATE



2021/22 FRESH GARLIC SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,016	\$6.7												
New South Wales	952	\$6.3												
Queensland	540	\$3.6												
South Australia	508	\$3.3												
Tasmania	95	\$0.6												
Western Australia	63	\$0.4												

Availability legend: High Medium Low None

Source: AGIA, GTA



MAIN GARLIC VARIETIES

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

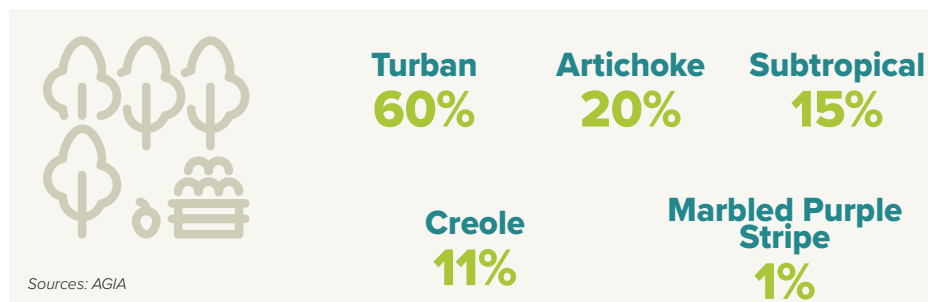
Turban, accounted for **60%** of fresh production.

Artichoke, accounted for **20%** of fresh production.

Subtropical, accounted for **15%** of fresh production.

Creole, accounted for **3%** of fresh production.

Marbled Purple Stripe, accounted for **2%** of fresh production.



2021/22 FRESH GARLIC SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Turban	1,904												
Artichoke	635												
Subtropical	476												
Creole	95												
Marbled Purple Stripe	63												

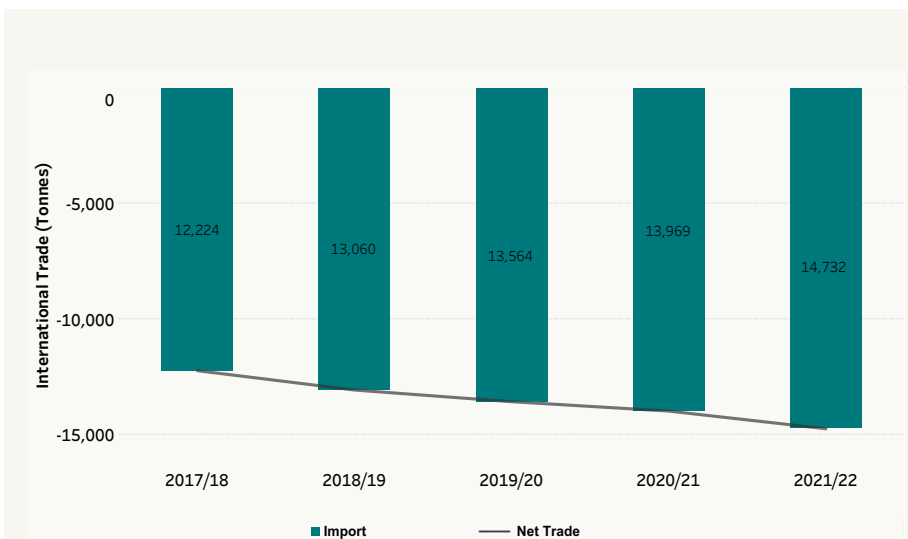
Availability legend: ■ High ■ Medium ■ Low ■ None

Sources: AGIA

Fresh Garlic International Trade

FRESH GARLIC INTERNATIONAL TRADE

Australia is a net importer of fresh garlic, importing **10,000-14,000 tonnes** annually. For the year ending in June 2022, Australia imported **14,732 tonnes** of fresh garlic. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





FRESH GARLIC IMPORTS BY STATE

Imports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
New South Wales	6,097	5,831	6,185
Victoria	4,094	5,305	5,610
Western Australia	1,239	1,299	1,280
South Australia	-	6	34
Queensland	2,134	1,526	1,620
Other	-	< 0.5	< 0.5
TOTAL	13,562	13,966	14,729

FRESH GARLIC IMPORTS BY COUNTRY

Imports by Country (Tonnes)			
Year Ending June	2020	2021	2022
China	10,063	10,665	11,420
Mexico	1,108	664	851
Sth. Korea	24	-	96
US	22	-	5
Other	2,347	2,637	2,357
TOTAL	13,562	13,966	14,729

Source: GTA

Processed Garlic International Trade

2021/22 PROCESSED GARLIC INTERNATIONAL TRADE

For the year ending June 2022, **68 tonnes** of processed garlic was exported.



68
tonnes of processed
garlic exported

Source: GTA

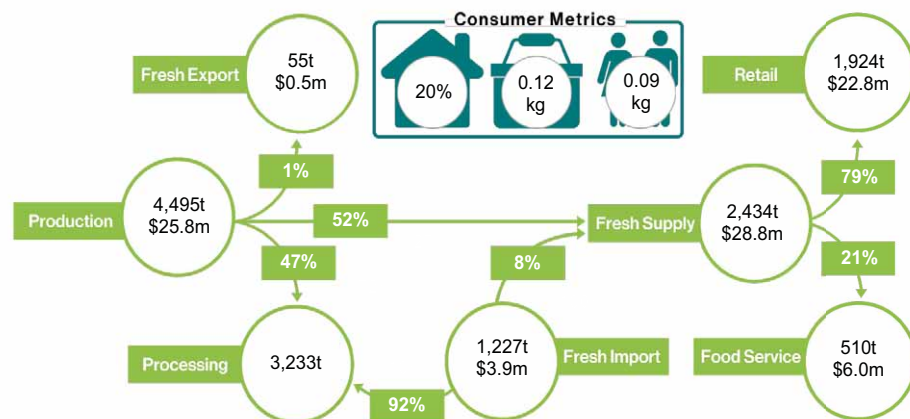
Ginger





Fresh Ginger Overview

FRESH GINGER SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

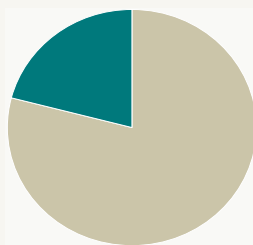
TOTAL PRODUCTION:



\$25.8M

4,495t produced and valued at **\$25.8M** with 47% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was **\$28.8M**, with **\$22.8M** distributed into retail and **\$6M** into food service.

CONSUMER METRICS:



20%

20% of Australian households purchased ginger, buying an average of **122g** per shopping trip.

PER CAPITA CONSUMPTION:

0.09kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	6,004	5,184	-14%	4,495	-13%
Production (\$m)	\$28.3	\$55.5	+96%	\$25.8	-53%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	25	12	-53%	55	>100%
Fresh Export Value (\$m)	\$0.3	\$0.1	-54%	\$0.5	>100%
Fresh Import Volume (t)	204	811	>100%	1,227	+51%
Fresh Import Value (\$m)	\$1.1	\$2.9	>100%	\$3.9	+32%
Fresh Supply (t)	3,185	2,810	-12%	2,434	-13%
Fresh Supply Wholesale Value (\$m)	\$30.7	\$61.8	>100%	\$28.8	-53%
Supply per Capita (kg)	0.12	0.11	-12%	0.09	-14%
Retail Supply (t)	2,590	2,239	-14%	1,924	-14%
Retail Supply Wholesale Value (\$m)	\$25.0	\$49.3	+97%	\$22.8	-54%
Food Service Supply (t)	596	571	-4%	510	-11%
Food Service Wholesale Value (\$m)	\$5.7	\$12.6	>100%	\$6.0	-52%

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



Fresh Ginger Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

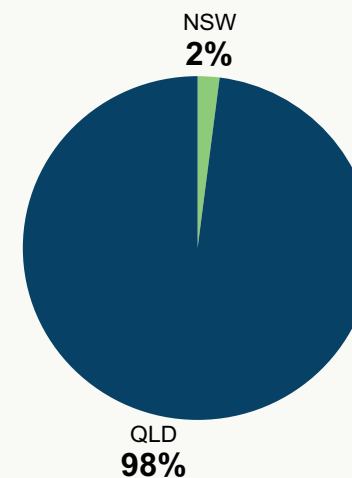
Australian ginger is grown mostly in Queensland. Processed ginger is often minced, candied and used in beverages. Australia imports fresh ginger, but the majority of these fresh imports are processed without entering the fresh supply chain. Fijian ginger has recently been granted access to the Australian fresh supply market.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH GINGER PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH GINGER SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	4,405	\$25.3	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	90	\$0.5	None	None	None	Low	Medium	Medium	Medium	None	None	None	None	None

Availability legend: High Medium Low None

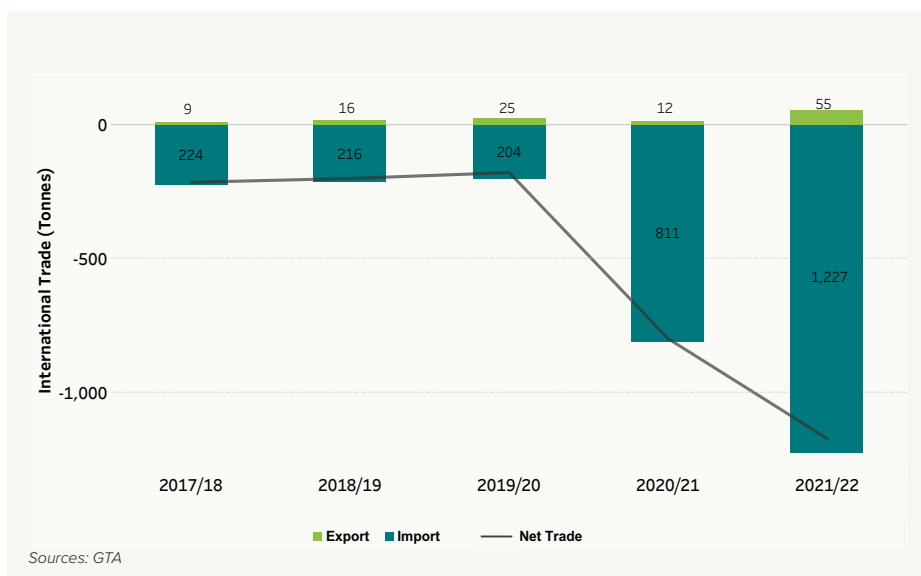
Source: AUSVEG



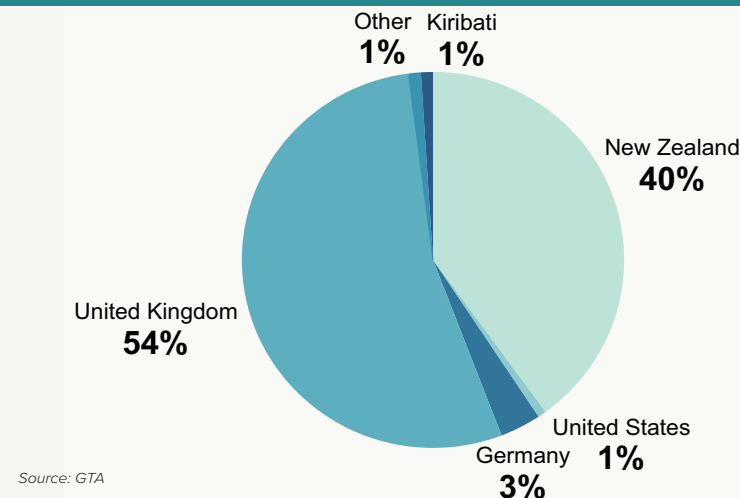
Fresh Ginger International Trade

FRESH GINGER INTERNATIONAL TRADE

Australia is a net importer of fresh ginger, although traditionally this has all been used in the processing industry without being allowed to enter the fresh supply chain. However, Fijian ginger now has fresh market access. Due to the way trade data is recorded, fresh and crushed ginger was recorded without differentiation prior to 2012, but has been differentiated since. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH GINGER EXPORTS BY COUNTRY



For the year ending June 2022, **54%** of exported fresh ginger were sent to **United Kingdom**, as profiled in the chart above.

FRESH GINGER 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
Queensland	21	242	719	Queensland	< 0.5	< 0.5	35
New South Wales	80	280	264	New South Wales	22	10	12
Victoria	93	256	196	Victoria	3	1	8
Western Australia	8	27	42	Northern Territory	-	< 0.5	< 0.5
South Australia	1	5	7	Other	< 0.5	< 0.5	< 0.5
Other	-	< 0.5	-	TOTAL	25	12	55
TOTAL	204	811	1,227				

FRESH GINGER 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
Fiji	13	157	646	UK	-	< 0.5	30
Vietnam	48	331	271	New Zealand	16	10	22
China	85	204	188	Germany	5	-	2
Thailand	19	74	43	Kiribati	-	< 0.5	1
India	26	27	34	US	< 0.5	-	< 0.5
Other	12	19	46	Other	3	1	1
TOTAL	204	811	1,227	TOTAL	25	12	55

Source: GTA



Processed Ginger International Trade

2021/22 PROCESSED GINGER INTERNATIONAL TRADE

For the year ending June 2022, **5 tonnes** of preserved ginger was imported, while **301 tonnes** were exported.



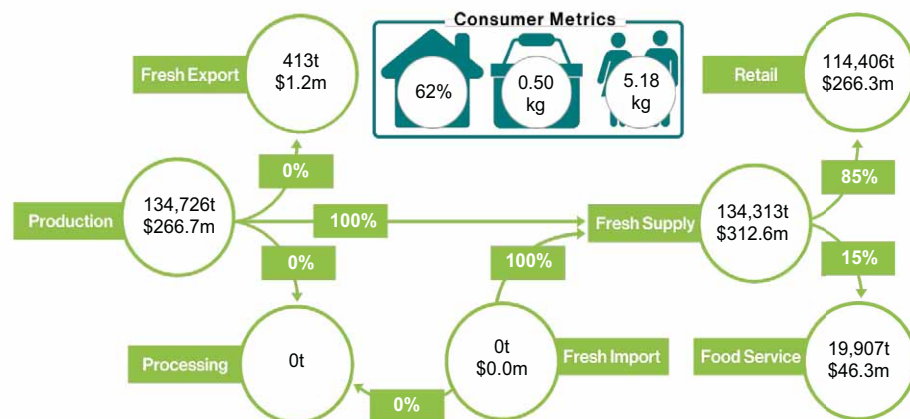


Head Lettuce



Fresh Head Lettuce Overview

FRESH HEAD LETTUCE SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

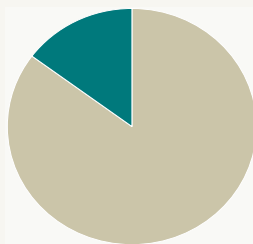
TOTAL PRODUCTION:



\$266.7M

134,726t produced and valued at \$266.7M

RETAIL VS FOOD SERVICE:



■ Retail 85% ■ Food Service 15%

The wholesale value of the fresh supply was **\$312.6M**, with **\$266.3M** distributed into retail and **\$46.3M** into food service.

CONSUMER METRICS:



62%

62% of Australian households purchased head lettuce, buying an average of **499g** per shopping trip.

PER CAPITA CONSUMPTION:

5.18kg



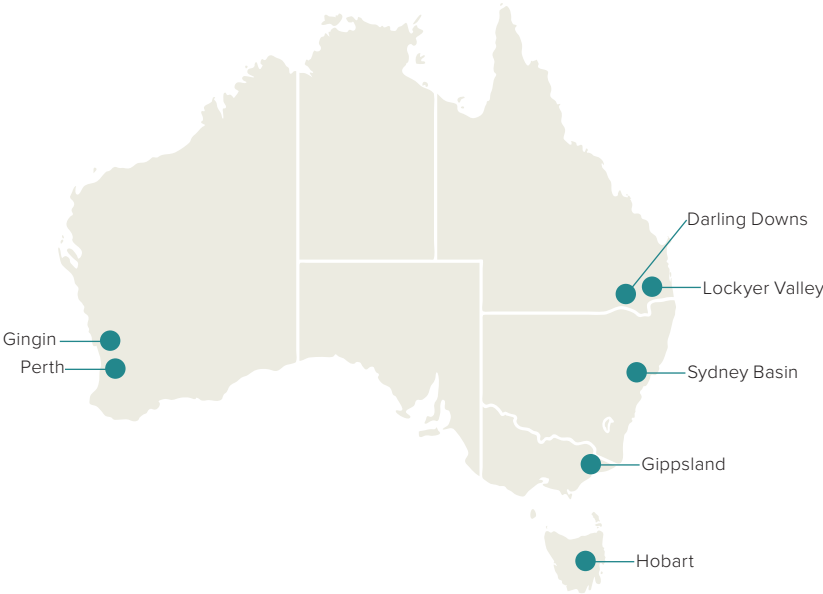
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	135,400	139,023	+3%	134,726	-3%
Production (\$m)	\$206.6	\$171.9	-17%	\$266.7	+55%
Production area (Ha)	5,495	-	-	-	-
Fresh Export Volume (t)	427	381	-11%	413	+8%
Fresh Export Value (\$m)	\$1.3	\$1.2	-5%	\$1.2	<1%
Fresh Import Volume (t)	3	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$-	-100%	\$-	-
Fresh Supply (t)	134,976	138,642	+3%	134,313	-3%
Fresh Supply Wholesale Value (\$m)	\$241.8	\$201.1	-17%	\$312.6	+55%
Supply per Capita (kg)	5.23	5.38	+3%	5.18	-4%
Retail Supply (t)	116,108	118,497	+2%	114,406	-3%
Retail Supply Wholesale Value (\$m)	\$208.0	\$171.8	-17%	\$266.3	+55%
Food Service Supply (t)	18,868	20,145	+7%	19,907	-1%
Food Service Wholesale Value (\$m)	\$33.8	\$29.2	-14%	\$46.3	+59%

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

Fresh Head Lettuce Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

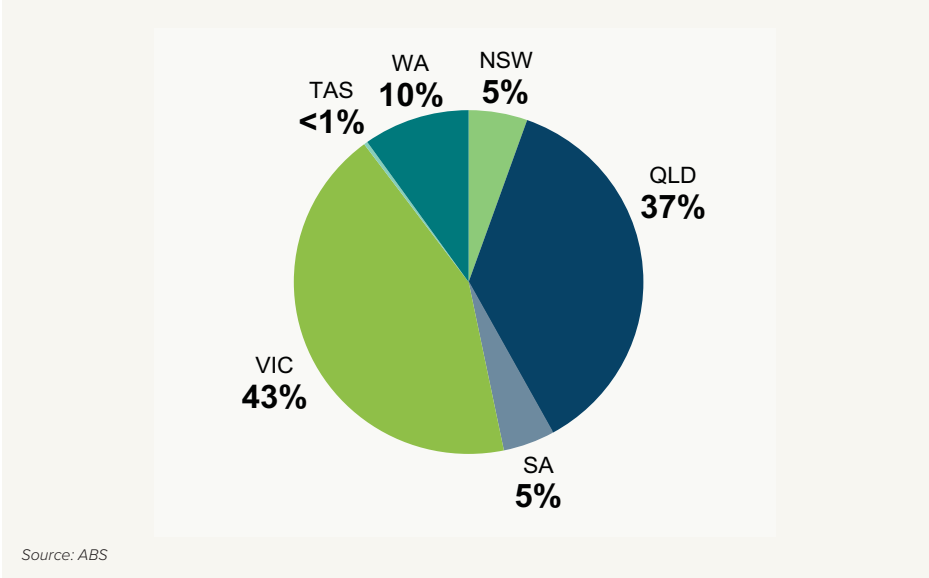
Head lettuce refers to lettuce products that are typically sold in a headed form, such as iceberg, cos and oak lettuces. Fresh lettuce leaves predominantly sold loose are covered in *Leafy Salad Vegetables* on page 279. Head lettuces are typically grown close to the major population centres across most states.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH HEAD LETTUCE PRODUCTION BY STATE



2021/22 FRESH HEAD LETTUCE SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	57,997	\$114.8	Low	Medium	Medium	Medium	Medium	High	High	High	Medium	Medium	Medium	Medium
Queensland	49,276	\$97.6	Low	Medium	Medium	Medium	High	High	High	Medium	Medium	Medium	Medium	Medium
Western Australia	13,256	\$26.2	Low	Medium	Medium	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	7,310	\$14.5	Medium	Medium	Medium	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium
South Australia	6,427	\$12.7	Low	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium
Tasmania	459	\$0.9	Low	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: AUSVEG



MAIN HEAD LETTUCE VARIETIES

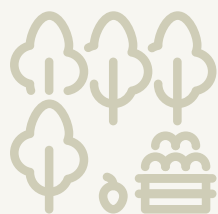
Although there are currently a number of varieties grown in Australia, production for the fresh market is dominated by three main varieties. These include:

Iceberg, a tight headed spherical head lettuce. Iceberg lettuce accounted for **75%** of fresh production for the year ending June 2022.

Cos, a tight bunched head lettuce. Cos lettuces are accounted for **20%** of fresh production.

Oak, the most common loosely head lettuce, accounted for **4%** of fresh production.

Other common **Fancy Leaf** lettuces such as butter leaf accounted for **1%** of fresh production.



Iceberg
75%

Cos
20%

Oak
4%

Fancy Leaf
1%

Sources: AUSVEG

2021/22 FRESH HEAD LETTUCE SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Iceberg	101,315	Low	Medium	Medium	High	High	High	High	High	Medium	Medium	Low	None
Cos	26,676	Low	Medium	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Low	None
Oak	5,254	Low	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Low	None
Other Fancy	1,482	Low	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Low	None

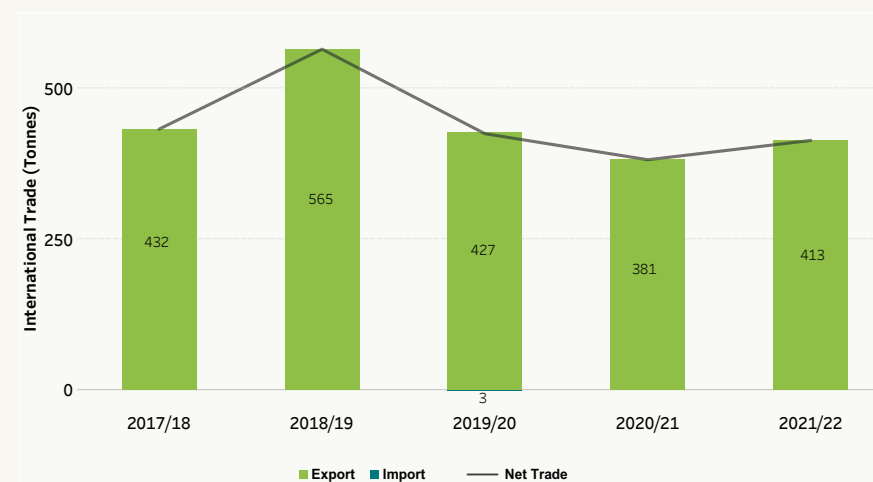
Availability legend: High Medium Low None

Sources: AUSVEG

Fresh Head Lettuce International Trade

FRESH HEAD LETTUCE INTERNATIONAL TRADE

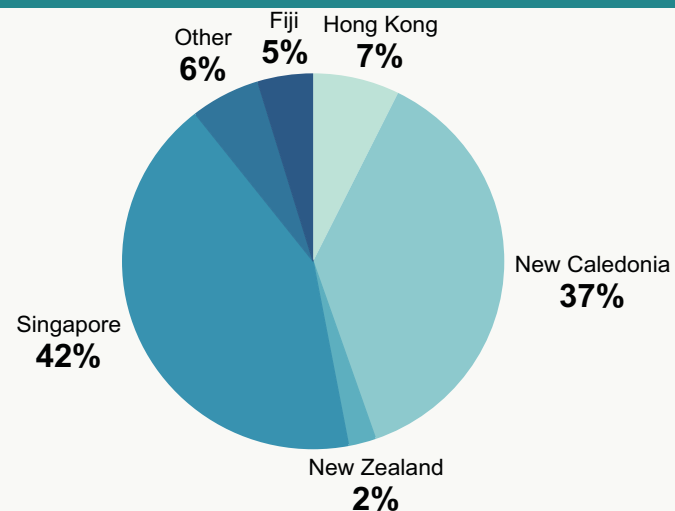
Australia has a small trade in head lettuce. For the year ending in June 2022, Australia exported **413 tonnes** of fresh head lettuce. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH HEAD LETTUCE EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **42%** of exported fresh head lettuce were sent to **Singapore**, as profiled in the chart above.

FRESH HEAD LETTUCE 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
Western Australia	3	-	-	Victoria	55	30	177
TOTAL	3	-	-	Western Australia	292	249	156
				New South Wales	33	54	71
				Queensland	46	48	8
				South Australia	1	< 0.5	1
				Other	< 0.5	1	< 0.5
				TOTAL	427	381	413

FRESH HEAD LETTUCE 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
New Zealand	3	-	-	Singapore	343	336	175
TOTAL	3	-	-	New Caledonia	-	-	155
				Hong Kong	10	8	30
				Fiji	11	1	19
				New Zealand	3	5	10
				Other	61	32	25
				TOTAL	427	381	413

Source: GTA

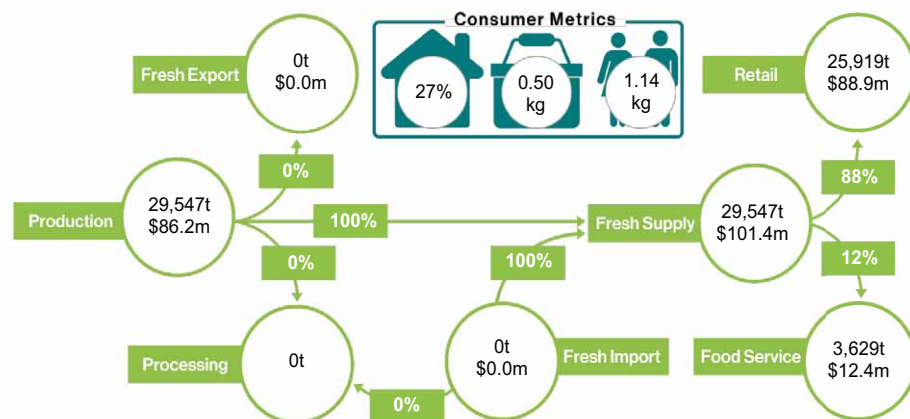


Leafy Asian Vegetables



Fresh Leafy Asian Vegetable Overview

FRESH LEAFY ASIAN VEGETABLE SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

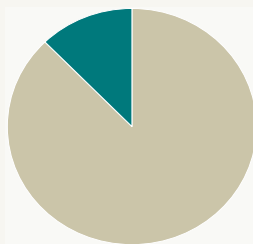
TOTAL PRODUCTION:



\$86.2M

29,547t produced and valued at **\$86.2M**

RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was **\$101.4M**, with **\$88.9M** distributed into retail and **\$12.4M** into food service.

CONSUMER METRICS:



27%

27% of Australian households purchased leafy Asian vegetable, buying an average of **501g** per shopping trip.

PER CAPITA CONSUMPTION:

1.14kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	31,897	30,547	-4%	29,547	-3%
Production (\$m)	\$77.2	\$71.7	-7%	\$86.2	+20%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	31,897	30,547	-4%	29,547	-3%
Fresh Supply Wholesale Value (\$m)	\$90.9	\$84.3	-7%	\$101.4	+20%
Supply per Capita (kg)	1.24	1.19	-4%	1.14	-4%
Retail Supply (t)	28,480	26,914	-5%	25,919	-4%
Retail Supply Wholesale Value (\$m)	\$81.1	\$74.3	-8%	\$88.9	+20%
Food Service Supply (t)	3,418	3,633	+6%	3,629	>-1%
Food Service Wholesale Value (\$m)	\$9.7	\$10.0	+3%	\$12.4	+24%

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

Fresh Leafy Asian Vegetables Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

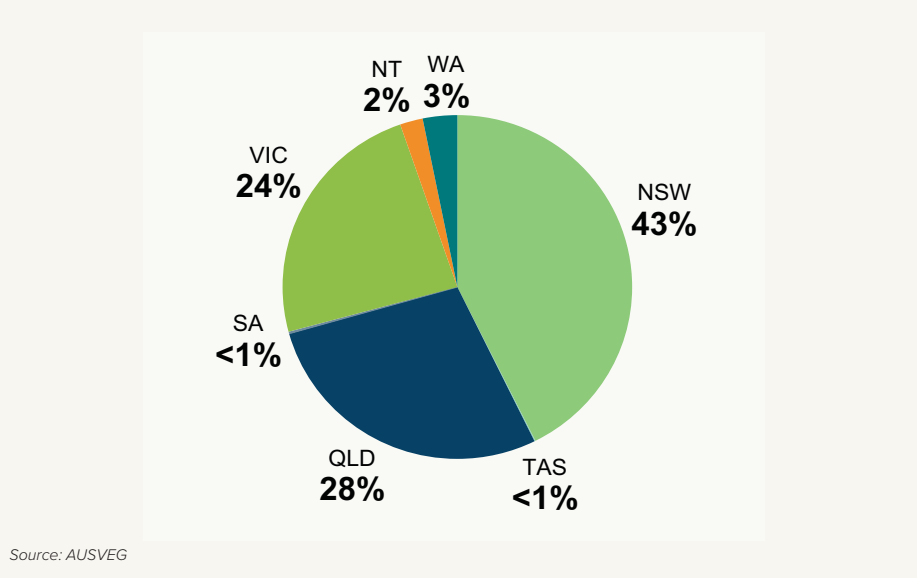
Leafy Asian vegetables cover a range of similar vegetables such as bok choy, pak choy, gai lan and wombok (Chinese cabbage). These varieties are sometimes referred to with different names. The most common names have been used in this report.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH LEAFY ASIAN VEGETABLE PRODUCTION BY STATE



2021/22 FRESH LEAFY ASIAN VEGETABLE SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	12,603	\$36.7	High	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Queensland	8,241	\$24.0	Medium	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Victoria	7,058	\$20.6	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	936	\$2.7	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Northern Territory	628	\$1.8	None	Medium	Medium	High	Medium	Medium	None	None	None	None	None	None
South Australia	55	\$0.2	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Tasmania	25	\$0.1	Medium	Medium	Medium	Medium	Medium	None	None	None	None	None	None	None

Availability legend: High Medium Low None

Source: AUSVEG



MAIN LEAFY ASIAN VEGETABLES VARIETIES

There are a large number of leafy Asian vegetables grown in Australia for the year ending in June 2022. Some of the major varieties include:

Wombok, also known as Chinese cabbage, accounted for **38%** of fresh production.

Pak Choy accounted for **28%** of fresh production.

Bok Choy accounted for **15%** of fresh production.

Baby Choy accounted for **7%** of fresh production.

Choy Sum accounted for **5%** of fresh production.

Gai Lan, also known as Chinese broccoli, accounted for **4%** of fresh production.

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



Wombok
38%

Pak Choy
28%

Bok Choy
15%

Baby Choy
7%

Choy Sum
5%

Gai Lan
4%

Other
3%

Sources: AUSVEG

2021/22 FRESH LEAFY ASIAN VEGETABLES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Wombok	11,228	Low	None	None	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Pak Choy	8,273	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Bok Choy	4,432	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Baby Choy	2,068	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Choy Sum	1,477	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Gai Lan	1,211	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Other	857	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Sources: AUSVEG

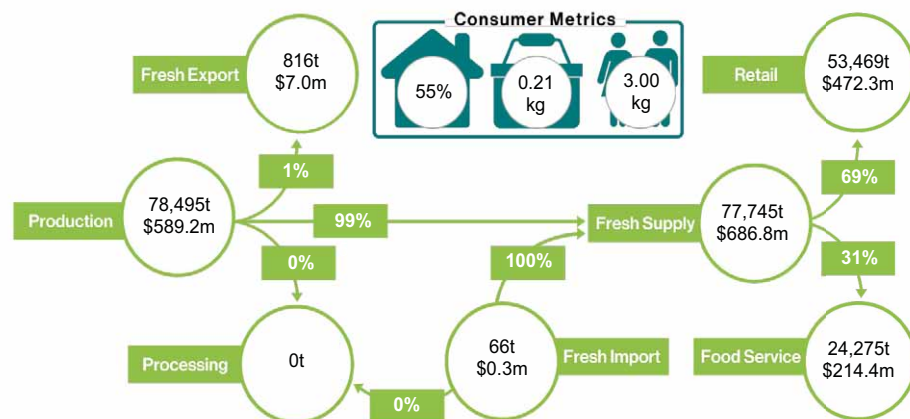


Leafy Salad Vegetables



Fresh Leafy Salad Vegetable Overview

FRESH LEAFY SALAD VEGETABLE SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

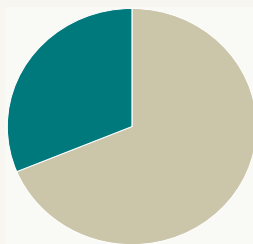
TOTAL PRODUCTION:



\$589.2M

78,495t produced and valued at \$589.2M

RETAIL VS FOOD SERVICE:



The wholesale value of the fresh supply was \$686.8M, with \$472.3M distributed into retail and \$214.4M into food service.

CONSUMER METRICS:



55%

55% of Australian households purchased leafy salad vegetable, buying an average of 205g per shopping trip.

PER CAPITA CONSUMPTION:

3.00kg



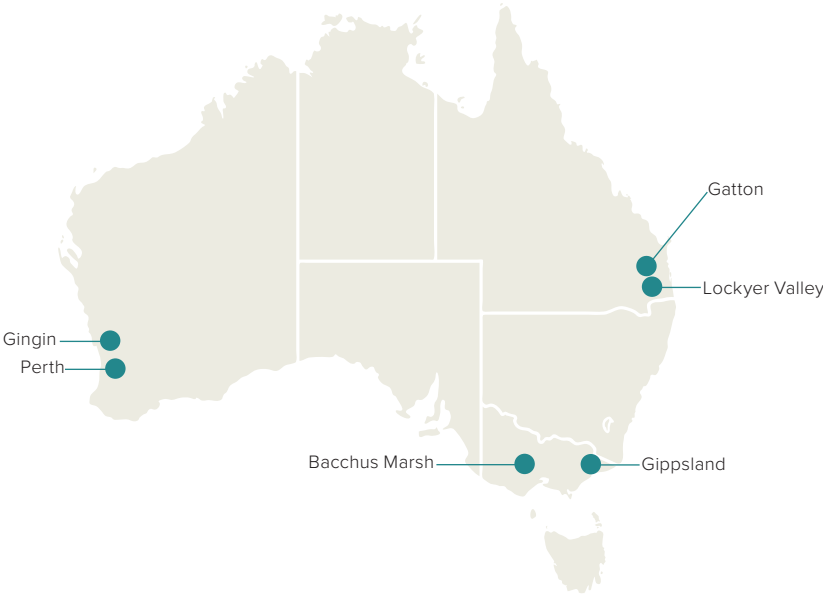
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	67,628	74,571	+10%	78,495	+5%
Production (\$m)	\$470.7	\$495.0	+5%	\$589.2	+19%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	1,345	1,028	-24%	816	-21%
Fresh Export Value (\$m)	\$9.9	\$8.1	-18%	\$7.0	-14%
Fresh Import Volume (t)	23	2	-89%	66	>100%
Fresh Import Value (\$m)	\$0.1	< \$0.1	-89%	\$0.3	>100%
Fresh Supply (t)	66,306	73,546	+11%	77,745	+6%
Fresh Supply Wholesale Value (\$m)	\$544.0	\$574.2	+6%	\$686.8	+20%
Supply per Capita (kg)	2.57	2.86	+11%	3.00	+5%
Retail Supply (t)	47,361	50,721	+7%	53,469	+5%
Retail Supply Wholesale Value (\$m)	\$388.6	\$396.0	+2%	\$472.3	+19%
Food Service Supply (t)	18,945	22,825	+20%	24,275	+6%
Food Service Wholesale Value (\$m)	\$155.4	\$178.2	+15%	\$214.4	+20%

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

Fresh Leafy Salad Vegetables Production

MAJOR PRODUCTION AREAS

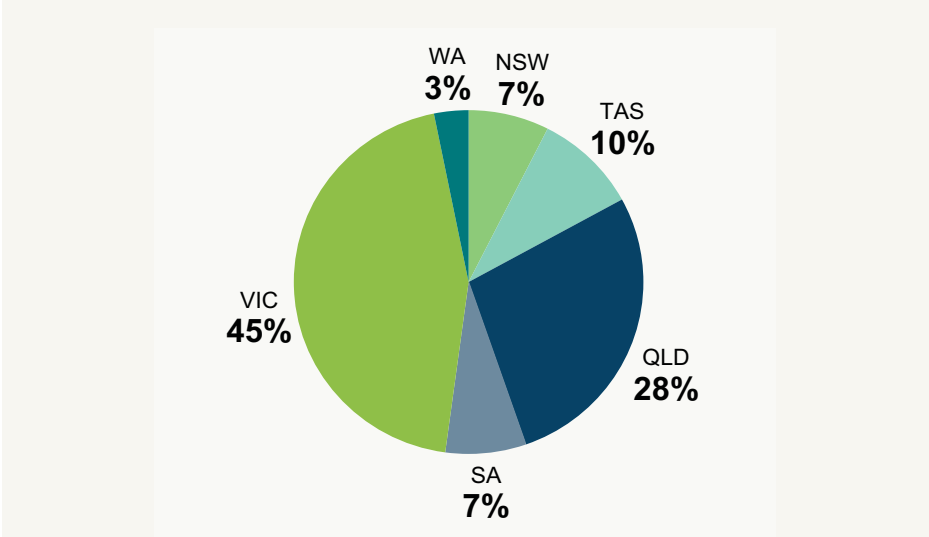


Source: AUSVEG

Leafy salad vegetables refers to a number of varieties of leafy vegetables that are typically in a loose form, such as rocket and baby spinach. Approximately **15%** of the production of each leafy salad vegetable (including the root mass) is cut off before being sold.



2021/22 FRESH LEAFY SALAD VEGETABLE PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH LEAFY SALAD VEGETABLE SEASONALITY BY STATE

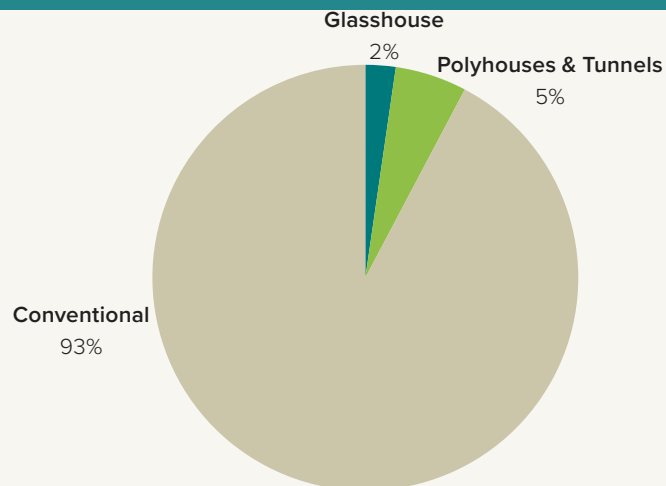
State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	35,079	\$262.3												
Queensland	21,716	\$163.3												
New South Wales	5,847	\$43.9												
South Australia	5,847	\$43.9												
Tasmania	7,517	\$56.8												
Western Australia	2,490	\$19.1												

Availability legend: High Medium Low None

Source: AUSVEG



2021/22 FRESH LEAFY SALAD VEGETABLES PRODUCTION BY SYSTEM



Production of leafy salad vegetables in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 2%**, **Polyhouses & Tunnels 5%** and **Conventional 93%**.

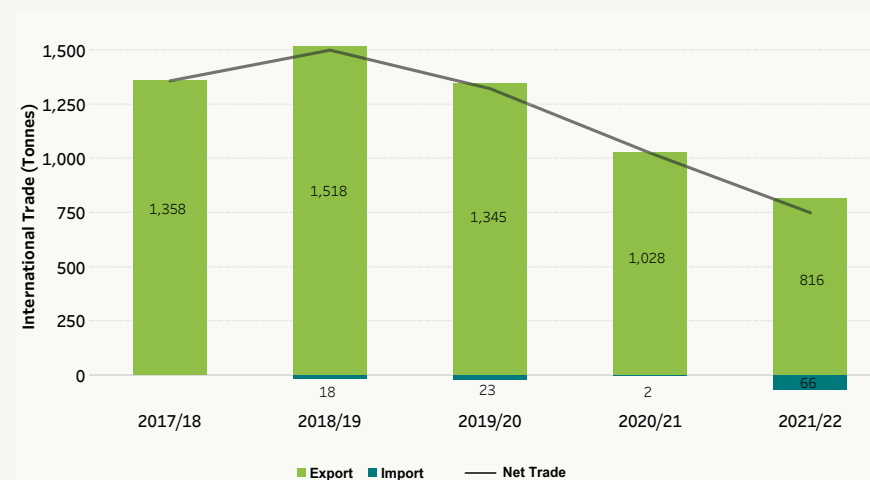
2021/22 FRESH LEAFY SALAD VEGETABLES PRODUCTION SYSTEM BY STATE

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	0	0	\$-	6	900	\$7.2	-	4,947	\$36.7
Victoria	3	540	\$5.2	7	1,050	\$8.3	-	33,489	\$248.7
Queensland	4	720	\$6.9	5	750	\$6.0	-	20,246	\$150.4
Western Australia	1	180	\$1.7	3	375	\$3.0	-	1,935	\$14.4
South Australia	0	0	\$-	6	900	\$7.2	-	4,947	\$36.7
Tasmania	2	360	\$3.5	2	300	\$2.4	-	6,857	\$50.9
Northern Territory	0	0	\$-	0	0	\$-	-	0	\$-

Fresh Leafy Salad Vegetable International Trade

FRESH LEAFY SALAD VEGETABLE INTERNATIONAL TRADE

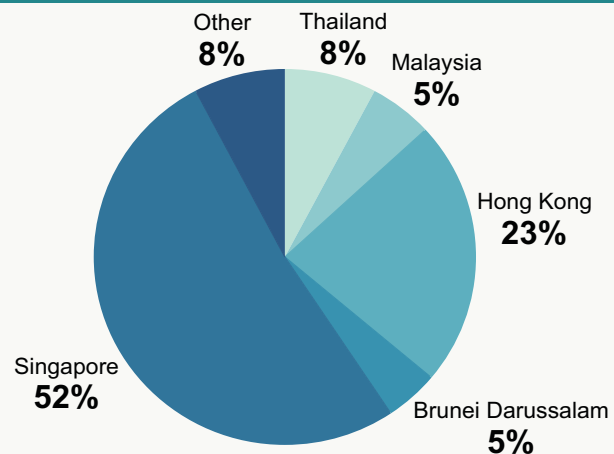
Australia is a net exporter of leafy salad vegetables. For the year ending in June 2022, Australia exported **816 tonnes** of fresh leafy salad vegetables. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH LEAFY SALAD VEGETABLE EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **52%** of exported fresh leafy salad vegetable were sent to **Singapore**, as profiled in the chart above.

FRESH LEAFY SALAD VEGETABLE 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
New South Wales	23	2	66	Victoria	932	726	580
TOTAL	23	2	66	New South Wales	134	116	118
				Queensland	150	89	75
				Western Australia	126	95	40
				South Australia	< 0.5	1	3
				Other	3	< 0.5	< 0.5
				TOTAL	1,345	1,028	816

FRESH LEAFY SALAD VEGETABLE 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
New Zealand	22	2	41	Singapore	588	566	422
US	1	-	25	Hong Kong	358	262	187
Italy	< 0.5	-	< 0.5	Thailand	65	38	63
Other	< 0.5	-	< 0.5	Malaysia	131	46	44
TOTAL	23	2	66	Brunei	45	50	37
				Other	158	65	63
				TOTAL	1,345	1,028	816

Source: GTA

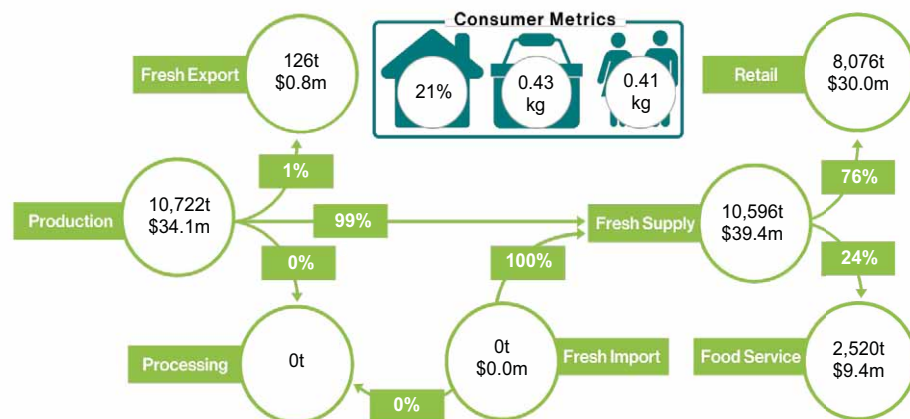
Leeks





Fresh Leeks Overview

FRESH LEEKS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

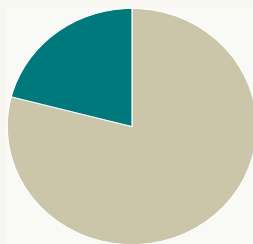
TOTAL PRODUCTION:



\$34.1M

10,772t produced and valued at \$34.1M

RETAIL VS FOOD SERVICE:



Retail 76% Food Service 24%

The wholesale value of the fresh supply was **\$39.4M**, with **\$30M** distributed into retail and **\$9.4M** into food service.

CONSUMER METRICS:



21%

21% of Australian households purchased leeks, buying an average of **426g** per shopping trip.

PER CAPITA CONSUMPTION:

0.41kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	11,519	11,099	-4%	10,722	-3%
Production (\$m)	\$28.4	\$27.3	-4%	\$34.1	+25%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	98	92	-6%	126	+38%
Fresh Export Value (\$m)	\$0.4	\$0.5	+17%	\$0.8	+44%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	11,422	11,007	-4%	10,596	-4%
Fresh Supply Wholesale Value (\$m)	\$32.9	\$31.6	-4%	\$39.4	+25%
Supply per Capita (kg)	0.44	0.43	-3%	0.41	-4%
Retail Supply (t)	8,854	8,402	-5%	8,076	-4%
Retail Supply Wholesale Value (\$m)	\$25.5	\$24.2	-5%	\$30.0	+24%
Food Service Supply (t)	2,568	2,605	+1%	2,520	-3%
Food Service Wholesale Value (\$m)	\$7.4	\$7.5	+1%	\$9.4	+25%

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

Fresh Leeks Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

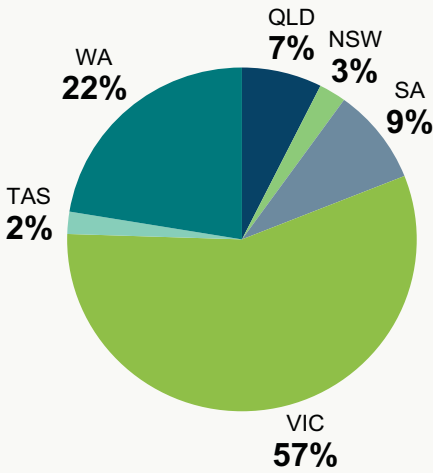
Leeks are grown predominantly in Victoria. Almost all of the leeks grown in Australia are destined for the fresh market.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH LEEKS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH LEEKS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	6,061	\$19.3	High	High	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low
Western Australia	2,402	\$7.6	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
South Australia	972	\$3.1	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	High
Queensland	794	\$2.5	High	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low
New South Wales	270	\$0.9	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	High
Tasmania	224	\$0.7	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

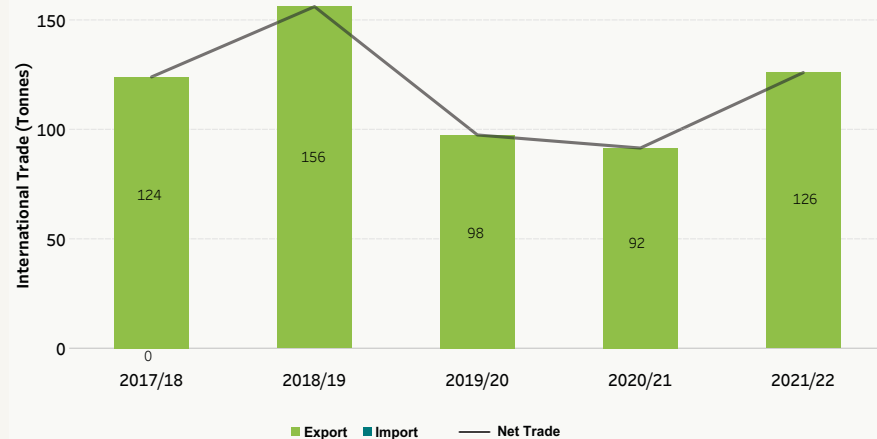
Source: AUSVEG



Fresh Leeks International Trade

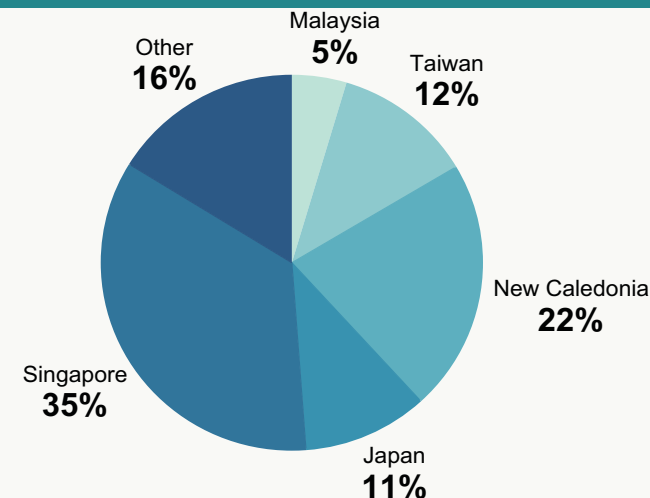
FRESH LEEKS INTERNATIONAL TRADE

Australia has a small trade in leeks. For the year ending June 2022, Australia exported **126 tonnes** of fresh leeks. The exports and imports over the last five years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA

2021/22 FRESH LEEKS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **35%** of exported fresh leeks were sent to **Singapore**, as profiled in the chart above.

FRESH LEEKS EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Victoria	63	49	94
New South Wales	22	26	23
Queensland	9	16	7
Tasmania	-	-	2
South Australia	< 0.5	< 0.5	< 0.5
Other	4	< 0.5	< 0.5
TOTAL	98	92	126

FRESH LEEKS EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Singapore	21	19	44
New Caledonia	13	20	27
Taiwan	1	1	15
Japan	20	10	13
Malaysia	10	6	6
Other	33	36	20
TOTAL	98	92	126

Source: GTA

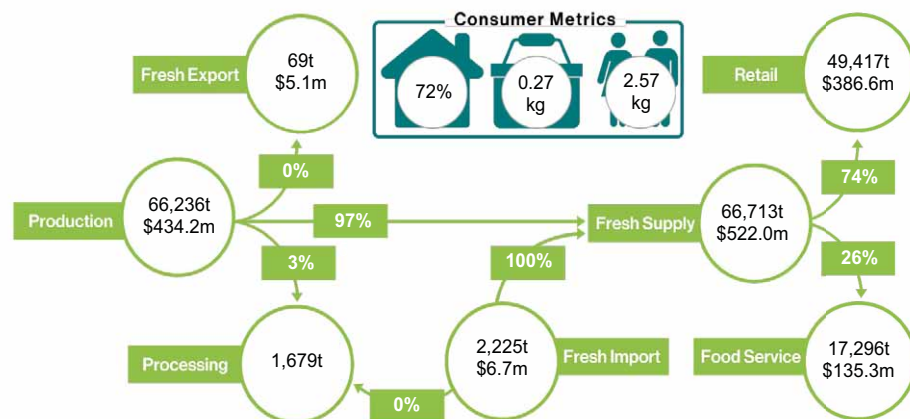
Mushrooms





Fresh Mushrooms Overview

FRESH MUSHROOMS SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: AC; Australian Mushroom Growers Association (AMGA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

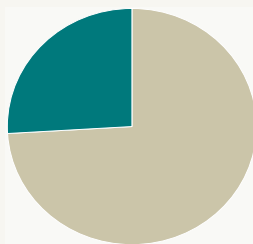
TOTAL PRODUCTION:



\$434.2M

66,236t produced and valued at **\$434.2M** with 3% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 74% ■ Food Service 26%

The wholesale value of the fresh supply was **\$522M**, with **\$386.6M** distributed into retail and **\$135.3M** into food service.

CONSUMER METRICS:



72%

72% of Australian households purchased mushrooms, buying an average of **269g** per shopping trip.

PER CAPITA CONSUMPTION:

2.57kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	68,823	68,936	<1%	66,236	-4%
Production (\$m)	\$367.8	\$393.1	+7%	\$434.2	+10%
Production area (Ha)	132	-	-	-	-
Fresh Export Volume (t)	72	66	-8%	69	+5%
Fresh Export Value (\$m)	\$6.3	\$6.0	-5%	\$5.1	-15%
Fresh Import Volume (t)	3,874	4,413	+14%	2,225	-50%
Fresh Import Value (\$m)	\$13.8	\$14.4	+5%	\$6.7	-54%
Fresh Supply (t)	70,880	71,536	<1%	66,713	-7%
Fresh Supply Wholesale Value (\$m)	\$450.0	\$485.5	+8%	\$522.0	+8%
Supply per Capita (kg)	2.75	2.78	+1%	2.57	-7%
Retail Supply (t)	55,375	53,105	-4%	49,417	-7%
Retail Supply Wholesale Value (\$m)	\$351.6	\$360.4	+3%	\$386.6	+7%
Food Service Supply (t)	15,505	18,431	+19%	17,296	-6%
Food Service Wholesale Value (\$m)	\$98.4	\$125.1	+27%	\$135.3	+8%

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



Fresh Mushrooms Production

MAJOR PRODUCTION AREAS



Source: AMGA

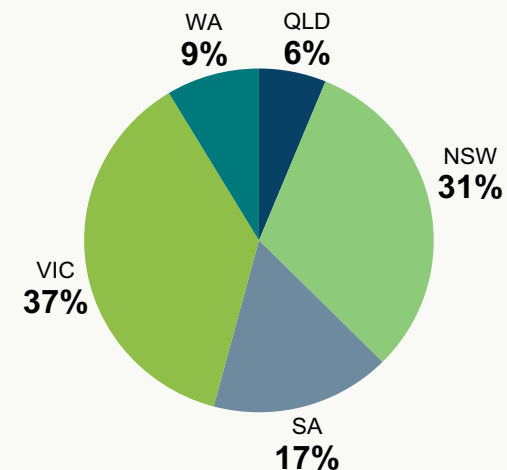
Mushrooms refer to a number of edible mushrooms grown for human consumption, including *agaricus bisporus* (button, cup, flat and brown mushrooms), as well as a number of exotic varieties including shiimeji and oyster mushroom. Mushrooms are grown in most states of Australia, close to population centres.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH MUSHROOMS PRODUCTION BY STATE



Source: AMGA

2021/22 FRESH MUSHROOMS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	24,650	\$161.6												
New South Wales	20,731	\$135.9												
South Australia	11,036	\$72.3												
Western Australia	5,703	\$37.4												
Queensland	4,116	\$27.0												

Availability legend: High Medium Low None

Source: AMGA

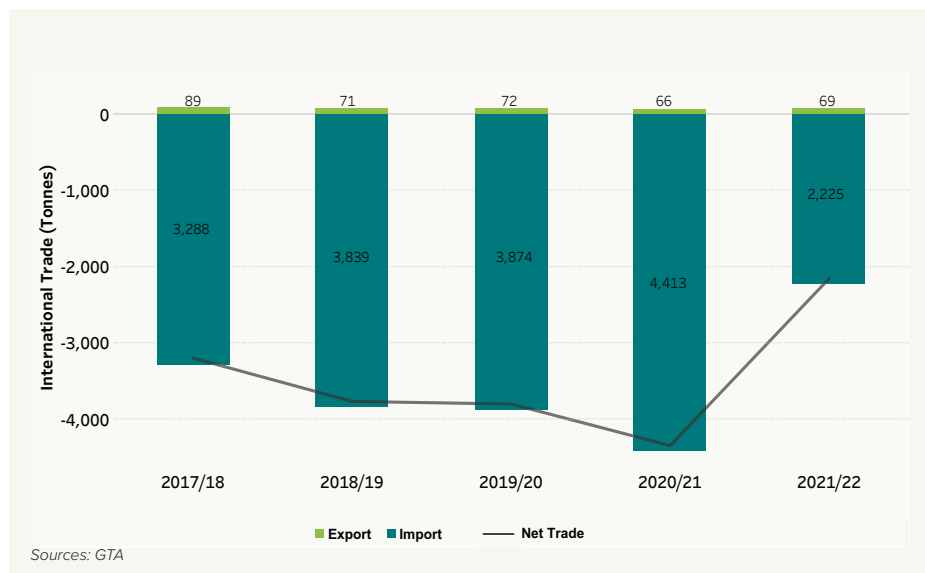


Fresh Mushrooms International Trade

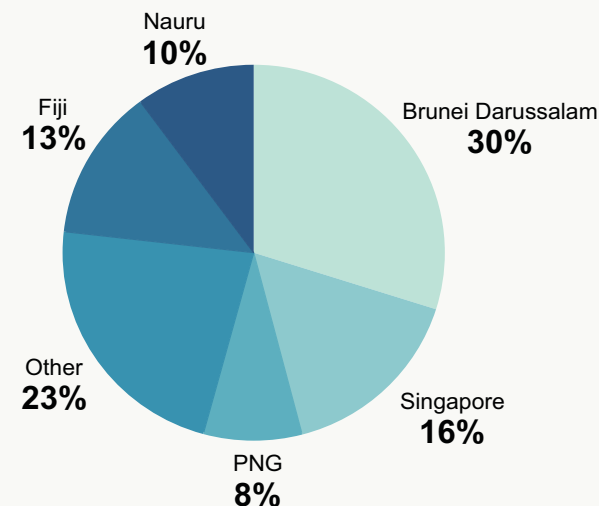
FRESH MUSHROOMS INTERNATIONAL TRADE

Note: Fresh mushroom international trade includes truffles.

Australia is a net importer of fresh mushrooms. For the year ending June 2022, Australia imported **2,225 tonnes** of fresh mushrooms. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH MUSHROOMS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **30%** of exported fresh mushrooms were sent to **Brunei Darussalam**, as profiled in the chart above.

FRESH MUSHROOMS 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	1,573	1,687	935	Victoria	27	27	26
New South Wales	1,675	1,885	848	Queensland	36	27	23
Queensland	187	424	236	New South Wales	2	3	14
Western Australia	434	417	207	Western Australia	7	8	6
South Australia	4	-	-	South Australia	< 0.5	1	1
Other	-	-	< 0.5	Other	1	< 0.5	< 0.5
TOTAL	3,874	4,413	2,225	TOTAL	72	66	69

FRESH MUSHROOMS 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
South Korea	3,188	3,457	1,765	Brunei	14	22	21
China	596	844	374	Singapore	3	4	11
Croatia	< 0.5	9	47	Fiji	21	6	9
Italy	11	80	32	Nauru	12	9	7
Spain	10	19	7	PNG	8	10	6
Other	68	3	< 0.5	Other	14	15	16
TOTAL	3,874	4,413	2,225	TOTAL	72	66	69

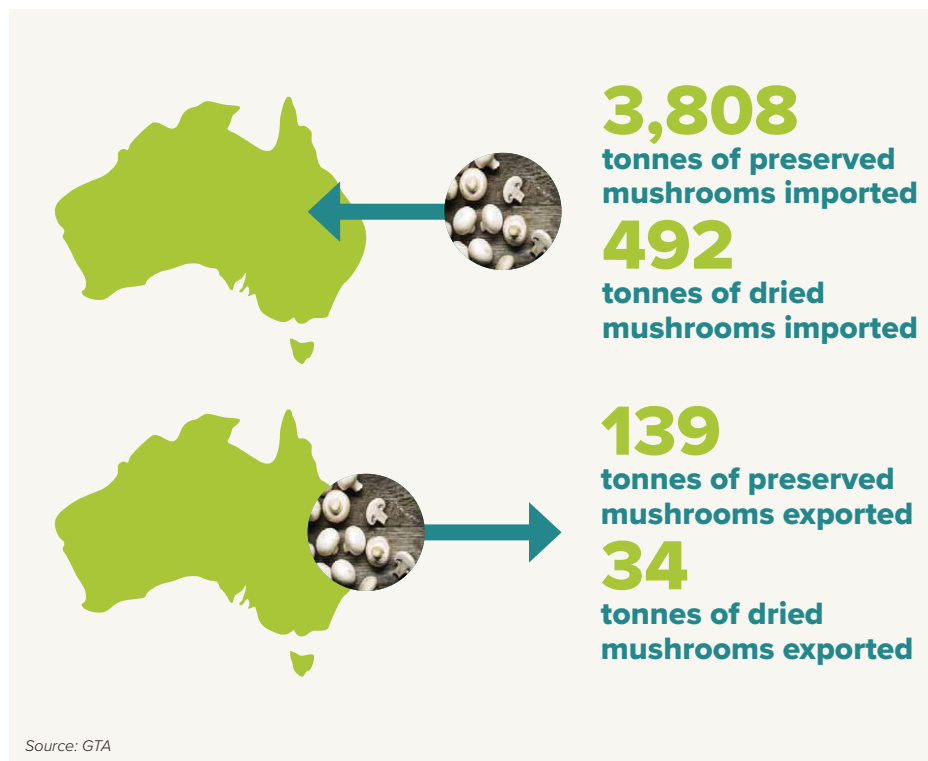
Source: GTA



Processed Mushrooms International Trade

2021/22 PROCESSED MUSHROOMS INTERNATIONAL TRADE

For the year ending June 2022, an additional **3,808 tonnes** of preserved mushrooms were imported and **139 tonnes** were exported, while **492 tonnes** of dried mushrooms were imported and **34 tonnes** were exported.



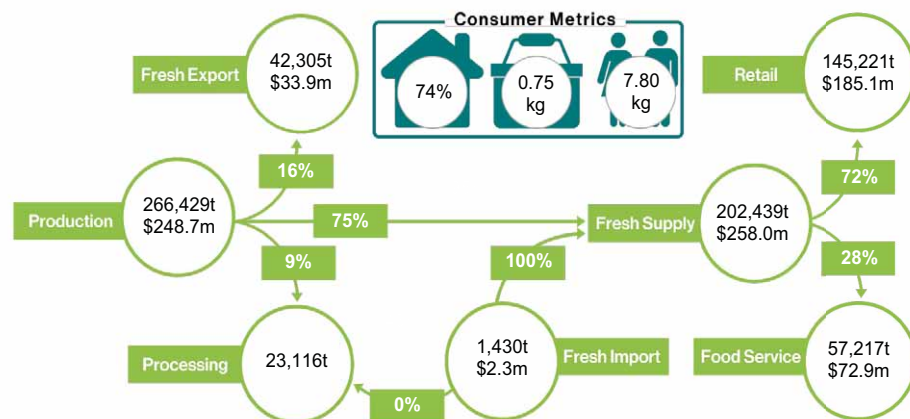
Onions





Fresh Onions Overview

FRESH ONIONS SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: ABS; AC; CFVIWA; GTA; Onions Australia (OA); MP & DD (Freshlogic Analysis)

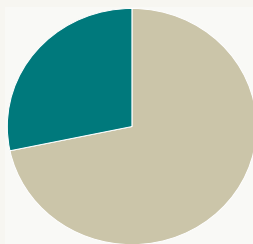
TOTAL PRODUCTION:



\$248.7M

266,429t produced and valued at **\$248.7M** with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 72% ■ Food Service 28%

The wholesale value of the fresh supply was **\$258.0M**, with **\$185.1M** distributed into retail and **\$72.9M** into food service.

CONSUMER METRICS:



74%

74% of Australian households purchased onions, buying an average of **747g** per shopping trip.

PER CAPITA CONSUMPTION:

7.80kg



in 2021/22 based on the volume supplied.

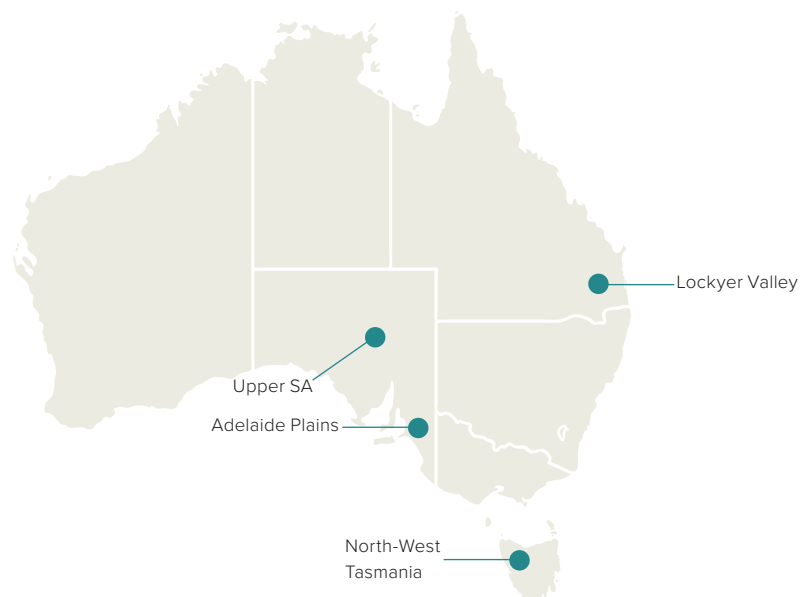
YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	265,159	271,383	+2%	266,429	-2%
Production (\$m)	\$243.9	\$202.7	-17%	\$248.7	+23%
Production area (Ha)	5,143	-	-	-	-
Fresh Export Volume (t)	36,474	44,873	+23%	42,305	-6%
Fresh Export Value (\$m)	\$30.2	\$30.4	<1%	\$33.9	+11%
Fresh Import Volume (t)	6,294	3,574	-43%	1,430	-60%
Fresh Import Value (\$m)	\$5.7	\$3.7	-36%	\$2.3	-37%
Fresh Supply (t)	211,975	206,538	-3%	202,439	-2%
Fresh Supply Wholesale Value (\$m)	\$261.9	\$209.6	-20%	\$258.0	+23%
Supply per Capita (kg)	8.22	8.02	-2%	7.80	-3%
Retail Supply (t)	155,009	149,449	-4%	145,221	-3%
Retail Supply Wholesale Value (\$m)	\$191.5	\$151.7	-21%	\$185.1	+22%
Food Service Supply (t)	56,966	57,089	<1%	57,217	<1%
Food Service Wholesale Value (\$m)	\$70.4	\$57.9	-18%	\$72.9	+26%

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



Fresh Onions Production

MAJOR PRODUCTION AREAS



Source: OA

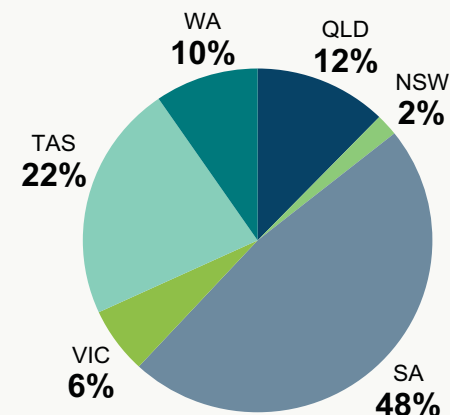
Onions are grown across most states of Australia, with the majority of production occurring in South Australia and Tasmania. Processed onions are typically dried and preserved.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH ONIONS PRODUCTION BY STATE



Source: ABS

2021/22 FRESH ONIONS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
South Australia	126,841	\$118.4												
Tasmania	59,341	\$55.4												
Queensland	32,616	\$30.5												
Western Australia	25,500	\$23.8												
Victoria	16,674	\$15.6												
New South Wales	5,456	\$5.1												

Availability legend: High Medium Low None

Source: ABS



MAIN ONION VARIETIES

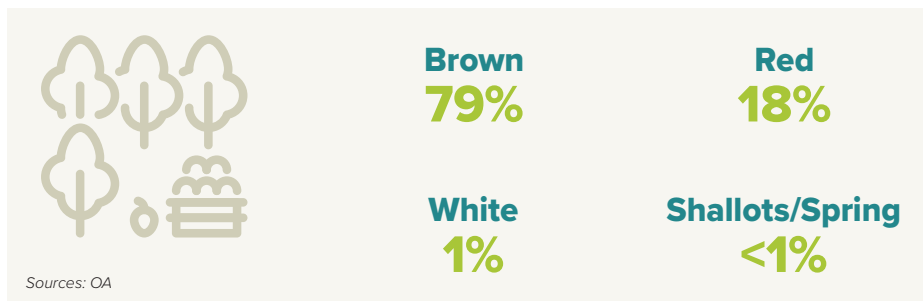
There are a number of onion varieties grown in Australia for the year ending June 2022. Some of the major varieties include:

Brown onions, accounted for **79%** of fresh production.

Red onions, accounted for **18%** of fresh production

White onions, accounted for **1%** of fresh production.

Shallots/Spring onions, accounted for **<1%** of fresh production.



2021/22 FRESH ONION SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Brown	200,596	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Red	48,498	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
White	2,419	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Shallots/Spring	1,218	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

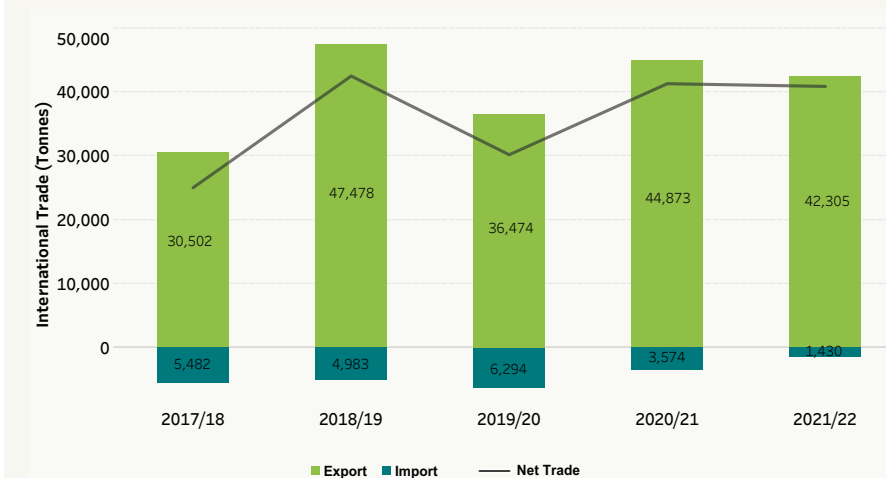
Availability legend: High Medium Low None

Sources: OA

Fresh Onion International Trade

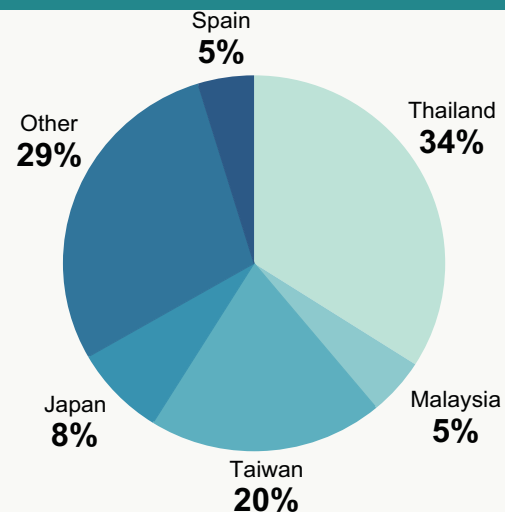
FRESH ONION INTERNATIONAL TRADE

Australia is a net exporter of fresh onions. For the year ending in June 2022, Australia exported **42,305 tonnes** of fresh onions. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH ONIONS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **34%** of exported fresh onions were sent to **Thailand**, as profiled in the chart above.

FRESH ONIONS IMPORTS AND EXPORTS BY STATE

Imports by State Destination ('000s Tonnes)				Exports by State of Production Origin ('000s Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Western Australia	2	1	1	Tasmania	20	22	22
New South Wales	2	1	< 0.5	South Australia	9	12	10
Victoria	3	1	< 0.5	Western Australia	6	9	9
South Australia	-	-	< 0.5	Victoria	< 0.5	1	1
Queensland	< 0.5	< 0.5	-	Queensland	1	1	< 0.5
Other	< 0.5	< 0.5	1	Other	1	< 0.5	1
TOTAL	6	3	1	TOTAL	36	45	42

FRESH ONIONS IMPORTS AND EXPORTS BY COUNTRY

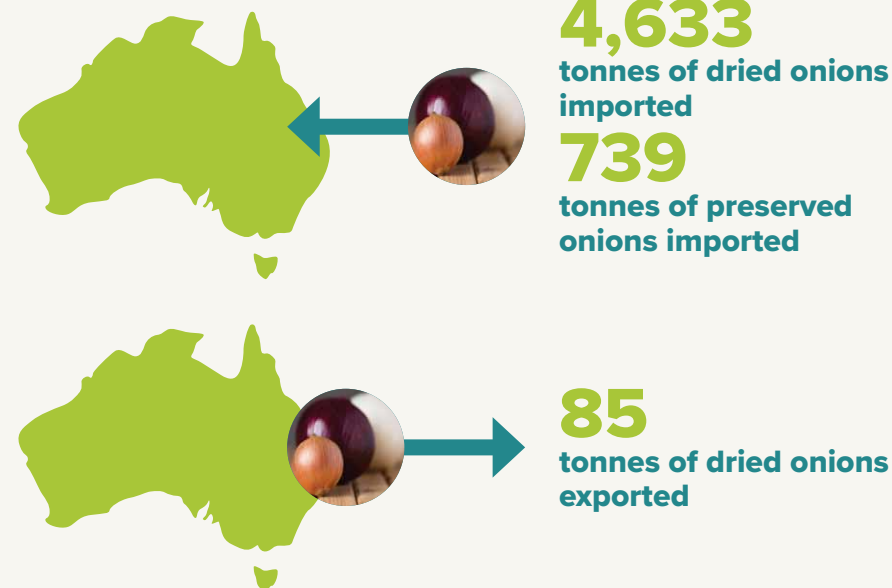
Imports by Country ('000s Tonnes)				Exports by Country ('000s Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
China	5	2	1	Thailand	6	10	14
Netherlands	1	< 0.5	< 0.5	Taiwan	3	8	8
US	1	< 0.5	< 0.5	Japan	1	1	3
Vietnam	-	-	< 0.5	Malaysia	3	5	2
India	< 0.5	< 0.5	< 0.5	Spain	1	1	2
Other	< 0.5	1	< 0.5	Other	22	20	12
TOTAL	6	3	1	TOTAL	36	45	42

Source: GTA

Processed Onions International Trade

2021/22 PROCESSED ONIONS INTERNATIONAL TRADE

For the year ending June 2022, an additional **4,633 tonnes** of dried onions was imported, while **85 tonnes** were exported, while **739 tonnes** of preserved onions were imported.



Source: GTA

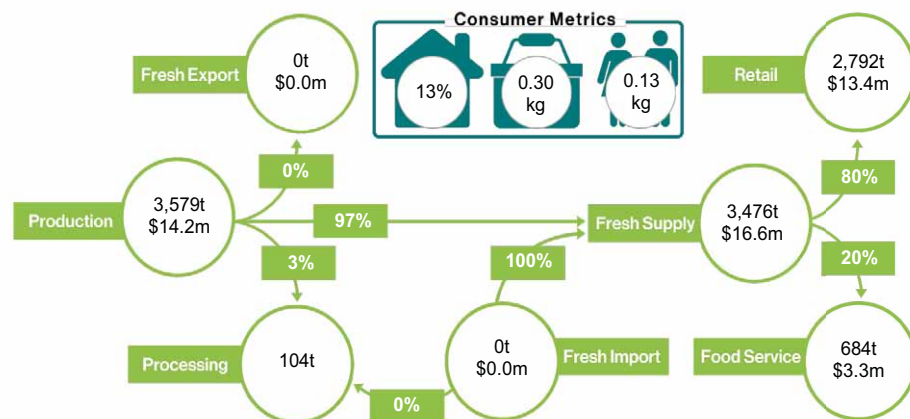
Parsnips





Fresh Parsnips Overview

FRESH PARSNIPS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

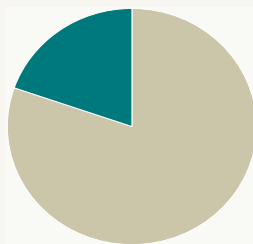
TOTAL PRODUCTION:



\$14.2M

3,579t produced and valued at **\$14.2M** with 3% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 80% ■ Food Service 20%

The wholesale value of the fresh supply was **\$16.6M**, with **\$13.4M** distributed into retail and **\$3.3M** into food service.

CONSUMER METRICS:



13%

13% of Australian households purchased parsnips, buying an average of **303g** per shopping trip.

PER CAPITA CONSUMPTION:

0.13kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	3,425	3,538	+3%	3,579	+1%
Production (\$m)	\$12.1	\$11.2	-8%	\$14.2	+27%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	3,325	3,435	+3%	3,476	+1%
Fresh Supply Wholesale Value (\$m)	\$14.2	\$13.1	-8%	\$16.6	+27%
Supply per Capita (kg)	0.13	0.13	+3%	0.13	<1%
Retail Supply (t)	2,726	2,781	+2%	2,792	<1%
Retail Supply Wholesale Value (\$m)	\$11.6	\$10.6	-9%	\$13.4	+26%
Food Service Supply (t)	600	654	+9%	684	+5%
Food Service Wholesale Value (\$m)	\$2.6	\$2.5	-3%	\$3.3	+31%

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

Fresh Parsnips Production

MAJOR PRODUCTION AREAS

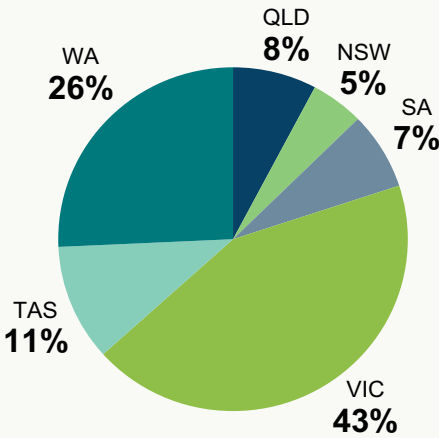


Source: AUSVEG

Parsnips are grown across most states of Australia, with the majority of production occurring in Victoria. Almost all of the parsnips grown in Australia are destined for the fresh market.



2021/22 FRESH PARSNIPS PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH PARSNIPS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,553	\$6.2	High	High	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	High
Western Australia	920	\$3.6	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High
Tasmania	392	\$1.6	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Medium
Queensland	277	\$1.1	High	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High
South Australia	261	\$1.0	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Medium
New South Wales	176	\$0.7	High	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High

Availability legend: High Medium Low None

Source: AUSVEG

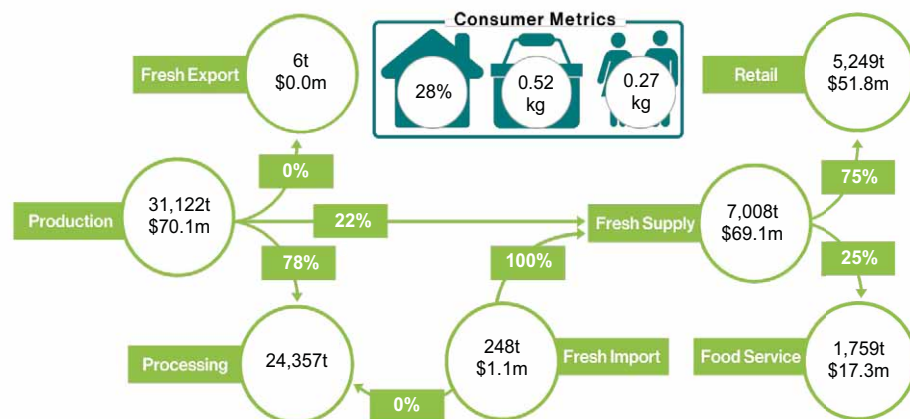
Peas





Fresh Peas Overview

FRESH PEAS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

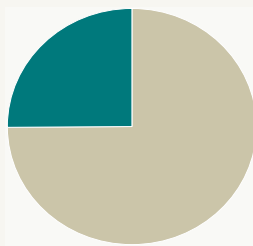
TOTAL PRODUCTION:



\$70.1M

31,122t produced and valued at **\$70.1M** with 78% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 75% ■ Food Service 25%

The wholesale value of the fresh supply was **\$69.1M**, with **\$51.8M** distributed into retail and **\$17.3M** into food service.

CONSUMER METRICS:



28%

28% of Australian households purchased peas, buying an average of **521g** per shopping trip.

PER CAPITA CONSUMPTION:

0.27kg



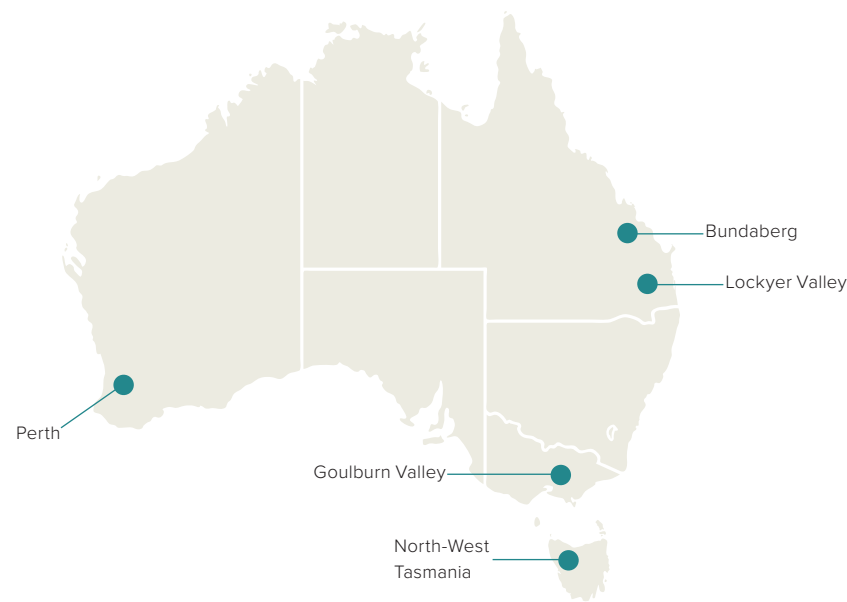
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	29,104	35,248	+21%	31,122	-12%
Production (\$m)	\$59.2	\$63.2	+7%	\$70.1	+11%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	6	4	-25%	6	+35%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-32%	< \$0.1	-14%
Fresh Import Volume (t)	764	635	-17%	248	-61%
Fresh Import Value (\$m)	\$2.0	\$1.9	-3%	\$1.1	-43%
Fresh Supply (t)	6,507	8,293	+27%	7,008	-15%
Fresh Supply Wholesale Value (\$m)	\$58.1	\$65.0	+12%	\$69.1	+6%
Supply per Capita (kg)	0.25	0.32	+28%	0.27	-16%
Retail Supply (t)	4,682	6,236	+33%	5,249	-16%
Retail Supply Wholesale Value (\$m)	\$41.8	\$48.9	+17%	\$51.8	+6%
Food Service Supply (t)	1,826	2,058	+13%	1,759	-15%
Food Service Wholesale Value (\$m)	\$16.3	\$16.1	>-1%	\$17.3	+7%

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

Fresh Peas Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

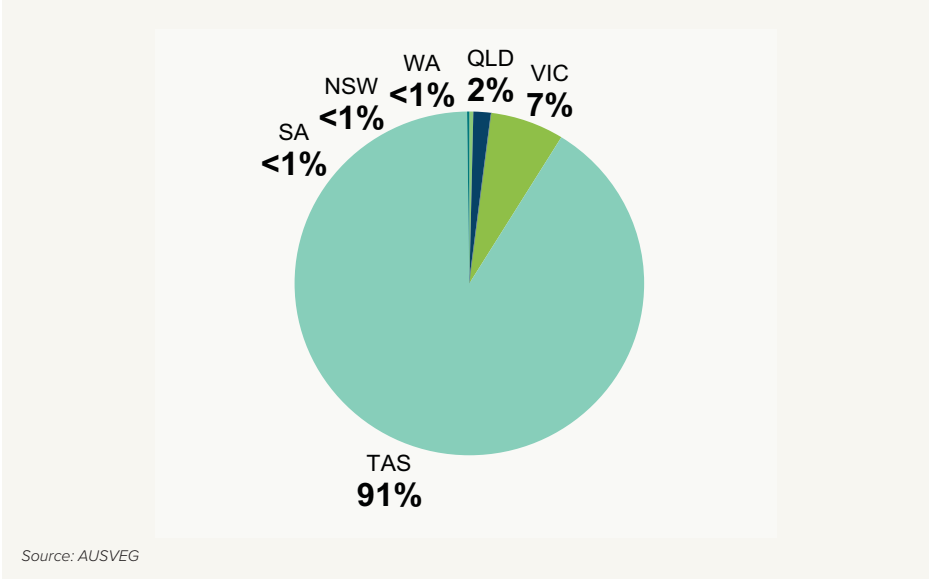
Peas are grown across most states of Australia, with the majority of production occurring in Tasmania.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH PEAS PRODUCTION BY STATE



2021/22 FRESH PEAS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	28,317	\$63.8	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	2,117	\$4.8	Medium	Medium	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Queensland	512	\$1.2	Medium	High	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	111	\$0.2	Medium	Medium	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	64	\$0.1	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	2	\$0.0	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow), None (Grey)

Source: AUSVEG



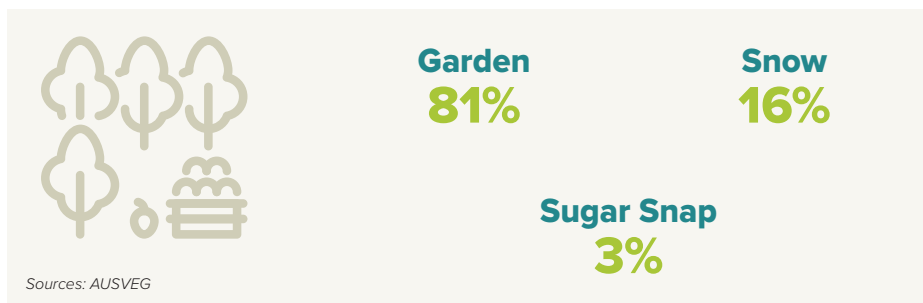
MAIN PEAS VARIETIES

The fresh market accounts for one third of all peas grown in Australia, comprising primarily of two varieties, while garden peas is the variety most commonly processed. These varieties include:

Garden peas, a round pea with a firm pod, these peas are the variety that are most commonly used in processing (frozen and dried), although some enter the fresh market. Garden peas accounted for **81%** of fresh production.

Snow peas, a flat pea with an edible pod and small peas inside, typically with a string that needs to be removed. Snow peas accounted for **16%** of fresh production.

Sugar snap peas, a rounder with a edible pod. They are a cross between snow peas and garden peas. Sugar snap peas accounted for **3%** of fresh production.



2021/22 FRESH PEAS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Garden/Processed	25,060	High	High	High	High	High	High	High	High	High	High	High	High
Snow Peas	5,099	High	High	High	High	High	High	High	High	High	High	High	High
Sugar Snap	971	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Sources: AUSVEG

Fresh Peas International Trade

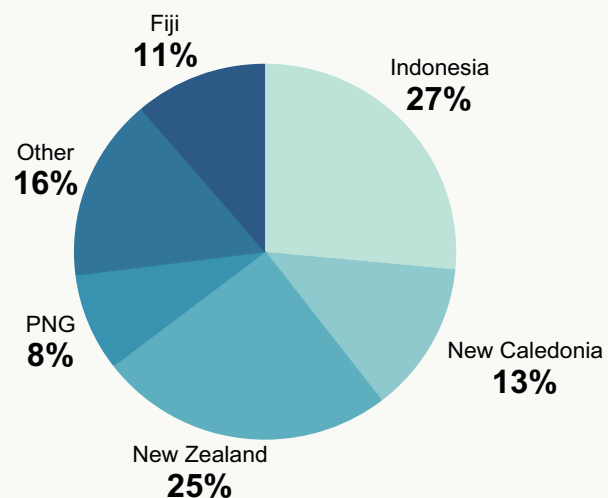
FRESH PEAS INTERNATIONAL TRADE

Australia is a net importer of fresh peas, with only minimal exports. For the year ending in June 2022, Australia imported **248 tonnes** of fresh peas. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH PEAS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **27%** of exported fresh peas were sent to **Indonesia**, as profiled in the chart above.

FRESH PEAS 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	72	94	130	Queensland	2	2	2
Western Australia	463	355	64	Victoria	4	2	2
New South Wales	230	187	54	New South Wales	< 0.5	< 0.5	< 0.5
TOTAL	764	635	248	Northern Territory	-	< 0.5	< 0.5
				Western Australia	< 0.5	< 0.5	-
				Other	< 0.5	< 0.5	2
				TOTAL	6	4	6

FRESH PEAS IMPORTS AND EXPORTS BY COUNTRY

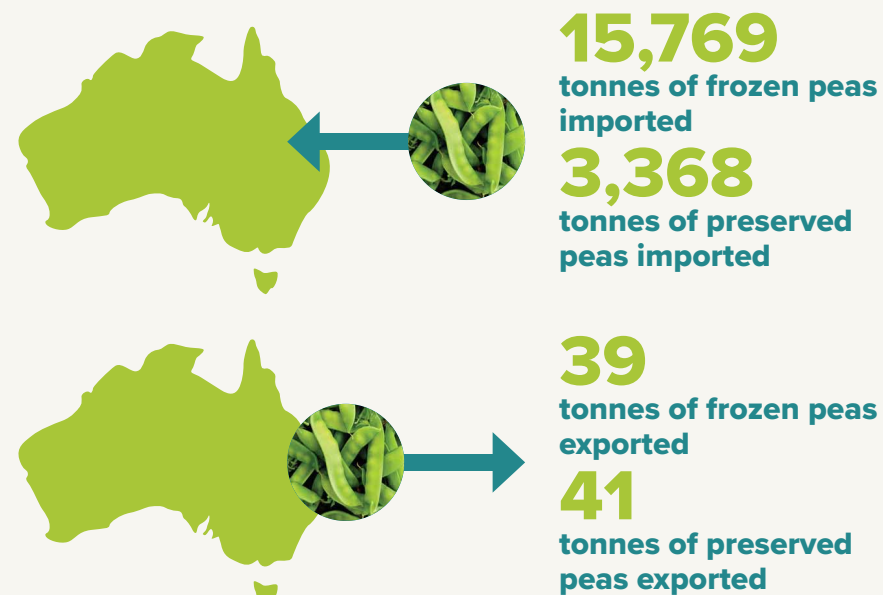
Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
China	254	358	213	Indonesia	1	< 0.5	2
New Zealand	86	42	23	New Zealand	-	1	1
Spain	-	-	10	New Caledonia	2	2	1
Belgium	357	195	2	Fiji	1	< 0.5	1
India	21	35	-	PNG	1	1	< 0.5
Other	46	6	-	Other	1	1	1
TOTAL	764	635	248	TOTAL	6	4	6

Source: GTA

Processed Peas International Trade

2021/22 PROCESSED PEAS INTERNATIONAL TRADE

For the year ending June 2022, an additional **15,769 tonnes** of frozen peas was imported, while **39 tonnes** were exported, while **3,368 tonnes** of preserved peas were imported, while **41 tonnes** were exported.



Source: GTA

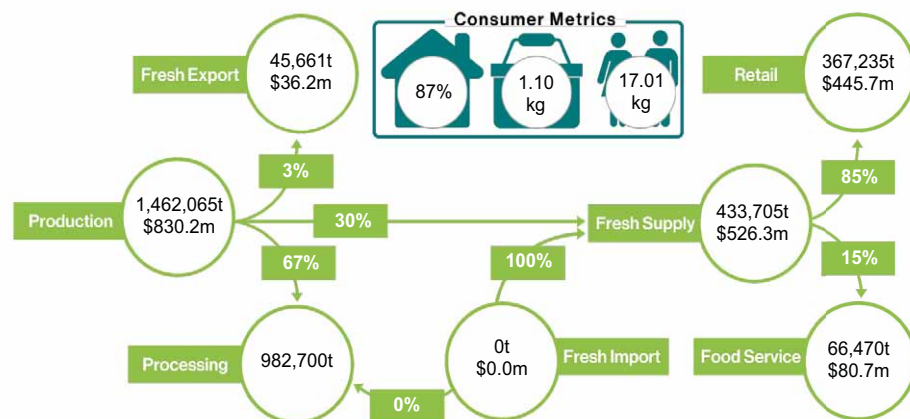
Potatoes

A photograph of a brown paper bag filled with yellow potatoes, resting on a dark, textured wooden surface. Several more yellow potatoes are scattered around the bag. The word "Potatoes" is overlaid in large white text.



Fresh Potatoes Overview

FRESH POTATOES SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: ABS; AC; AUSVEG; Potato Processing Association of Australia (PPAA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

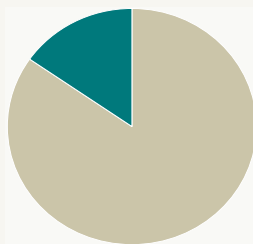
TOTAL PRODUCTION:



\$830.2M

1,462,065t produced and valued at **\$830.2M** with 67% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 85% ■ Food Service 15%

The wholesale value of the fresh supply was **\$526.3M**, with **\$445.7M** distributed into retail and **\$80.7M** into food service.

CONSUMER METRICS:



87%

87% of Australian households purchased potatoes, buying an average of **1.10kg** per shopping trip.

PER CAPITA CONSUMPTION:

17.01kg



in 2021/22 based on the volume supplied.

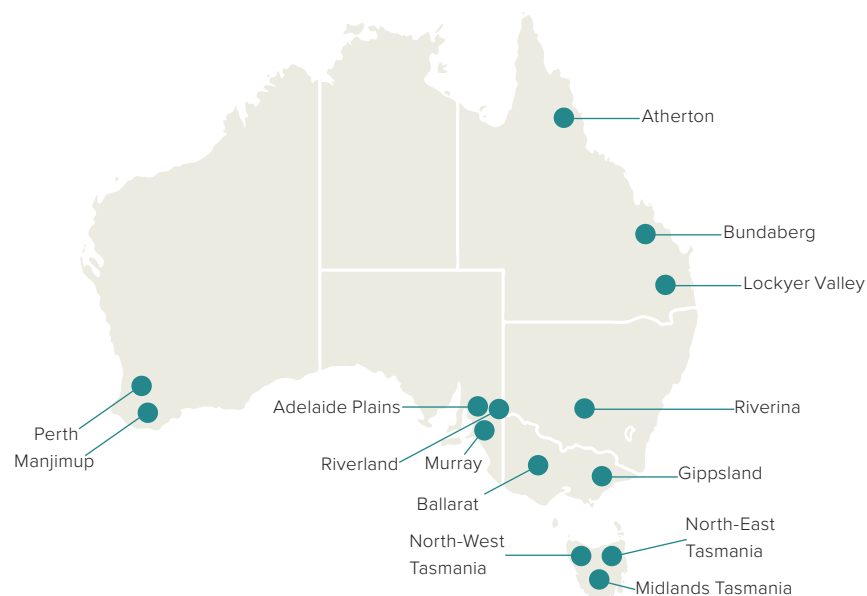
YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	1,388,870	1,458,991	+5%	1,462,065	<1%
Production (\$m)	\$716.4	\$807.3	+13%	\$830.2	+3%
Production area (Ha)	27,057	-	-	-	-
Fresh Export Volume (t)	40,253	37,274	-7%	45,661	+23%
Fresh Export Value (\$m)	\$33.6	\$31.1	-8%	\$36.2	+17%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	443,674	446,717	<1%	433,705	-3%
Fresh Supply Wholesale Value (\$m)	\$496.6	\$522.8	+5%	\$526.3	<1%
Supply per Capita (kg)	17.50	17.65	<1%	17.01	-4%
Retail Supply (t)	382,478	380,185	>-1%	367,235	-3%
Retail Supply Wholesale Value (\$m)	\$428.1	\$445.0	+4%	\$445.7	<1%
Food Service Supply (t)	61,196	66,532	+9%	66,470	>-1%
Food Service Wholesale Value (\$m)	\$68.5	\$77.9	+14%	\$80.7	+4%

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



Fresh Potatoes Production

MAJOR PRODUCTION AREAS



Source: AUSVEG; PPAA;

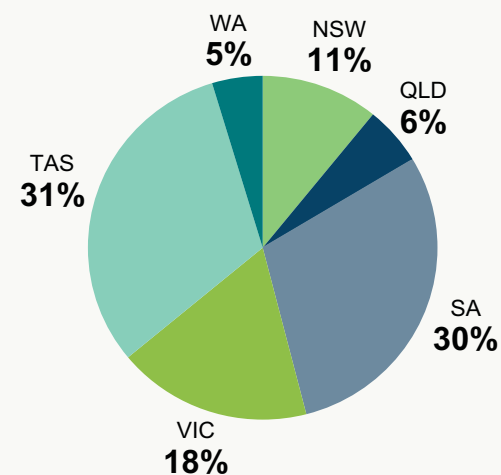
Potatoes are grown across Australia, with the majority of production occurring in South Australia and Tasmania.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH POTATOES PRODUCTION BY STATE



Source: ABS; AUSVEG; PPAA;

2021/22 FRESH POTATOES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	457,995	\$260.0												
South Australia	432,739	\$245.7												
Victoria	263,406	\$149.6												
New South Wales	158,792	\$90.2												
Queensland	80,909	\$45.9												
Western Australia	68,224	\$38.7												

Availability legend: High Medium Low None

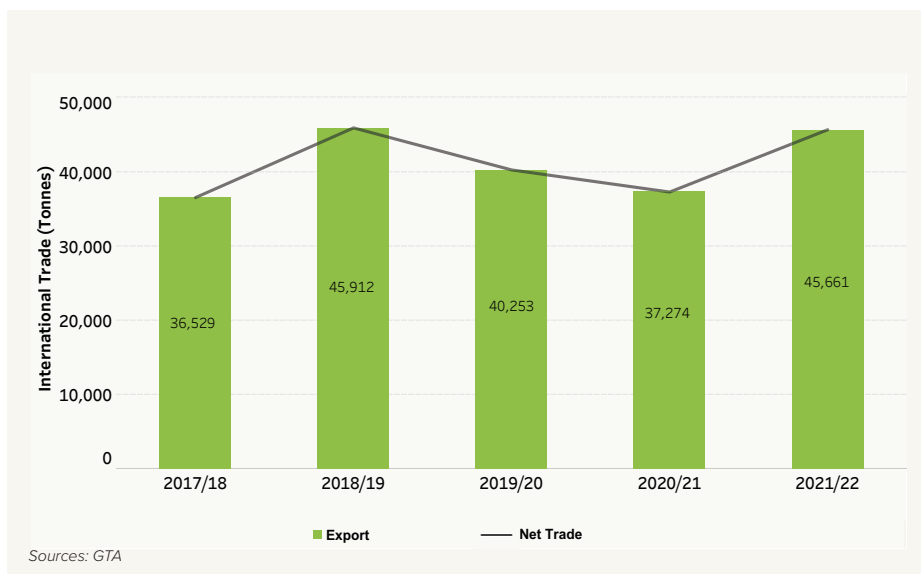
Source: AUSVEG; PPAA;



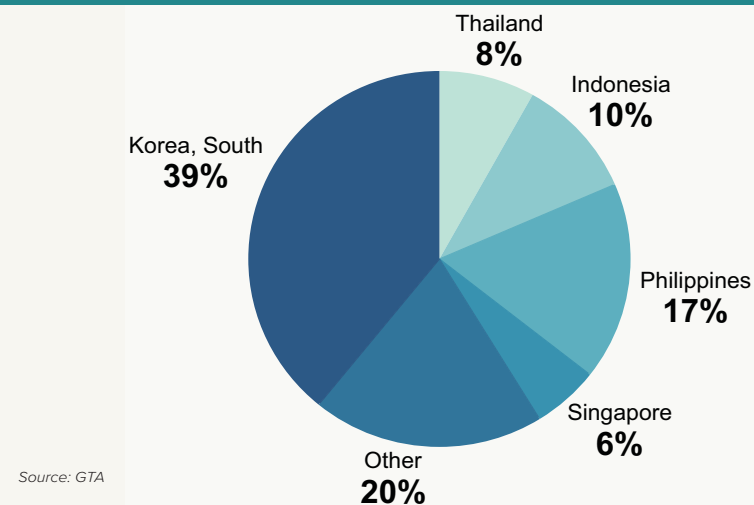
Fresh Potatoes International Trade

FRESH POTATOES INTERNATIONAL TRADE

Australia is a net exporter of fresh potatoes. For the year ending June 2022, Australia exported **45,661 tonnes** of fresh potatoes. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH POTATOES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **39%** of exported fresh potatoes were sent to **South Korea**, as profiled in the chart above.

FRESH POTATOES EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
South Australia	23,701	17,762	19,784
New South Wales	10,498	13,567	18,459
Western Australia	5,459	4,729	4,986
Victoria	221	1,143	2,354
Queensland	342	71	73
Other	28	2	4
TOTAL	40,249	37,274	45,661

FRESH POTATOES EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
South Korea	13,087	16,513	17,856
Philippines	7,288	7,395	7,797
Indonesia	4,656	376	4,749
Thailand	652	2	3,697
Singapore	2,462	2,465	2,582
Other	12,104	10,523	8,981
TOTAL	40,249	37,274	45,661

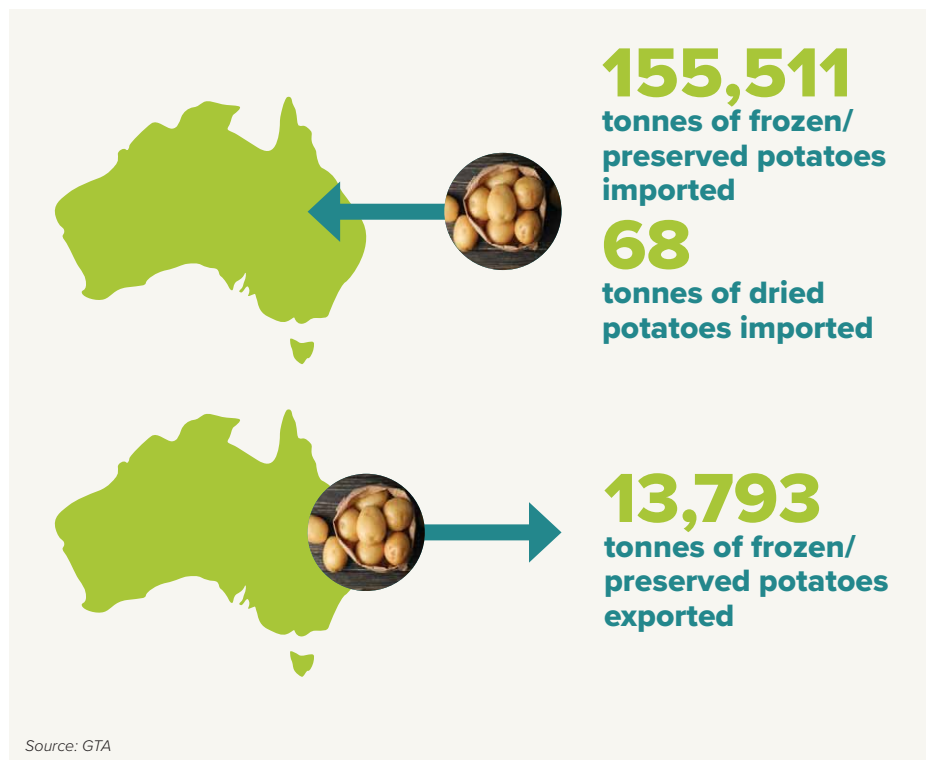
Source: GTA



Processed Potatoes International Trade

2021/22 PROCESSED POTATOES INTERNATIONAL TRADE

For the year ending June 2022, an additional **155,511 tonnes** of frozen or preserved potatoes and **68 tonnes** of dried potatoes were imported, while **13,793 tonnes** of frozen or preserved potatoes were exported.



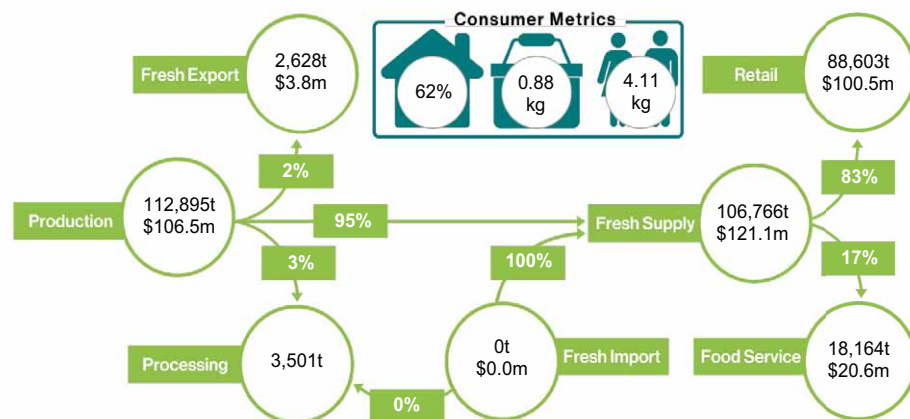
Pumpkins





Fresh Pumpkins Overview

FRESH PUMPKINS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

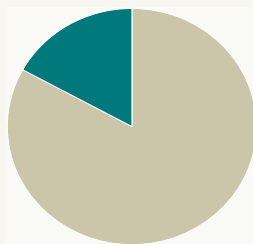
TOTAL PRODUCTION:



\$106.5M

112,895t produced and valued at **\$106.5M** with 3% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$121.1M**, with **\$100.5M** distributed into retail and **\$20.6M** into food service.

CONSUMER METRICS:



62%

62% of Australian households purchased pumpkins, buying an average of **882g** per shopping trip.

PER CAPITA CONSUMPTION:

4.11kg



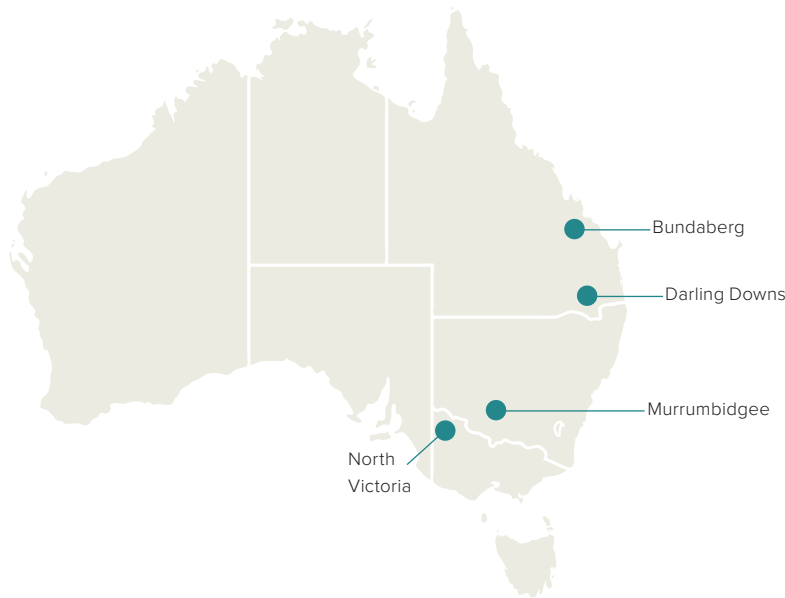
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	116,071	115,982	>-1%	112,895	-3%
Production (\$m)	\$107.5	\$89.4	-17%	\$106.5	+19%
Production area (Ha)	4,646	-	-	-	-
Fresh Export Volume (t)	3,256	3,385	+4%	2,628	-22%
Fresh Export Value (\$m)	\$5.8	\$4.9	-15%	\$3.8	-21%
Fresh Import Volume (t)	13	6	-56%	-	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	-65%	\$-	-100%
Fresh Supply (t)	109,228	109,007	>-1%	106,766	-2%
Fresh Supply Wholesale Value (\$m)	\$120.4	\$100.0	-17%	\$121.1	+21%
Supply per Capita (kg)	4.23	4.23	>-1%	4.11	-3%
Retail Supply (t)	92,566	91,989	>-1%	88,603	-4%
Retail Supply Wholesale Value (\$m)	\$102.0	\$84.4	-17%	\$100.5	+19%
Food Service Supply (t)	16,662	17,018	+2%	18,164	+7%
Food Service Wholesale Value (\$m)	\$18.4	\$15.6	-15%	\$20.6	+32%

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

Fresh Pumpkins Production

MAJOR PRODUCTION AREAS



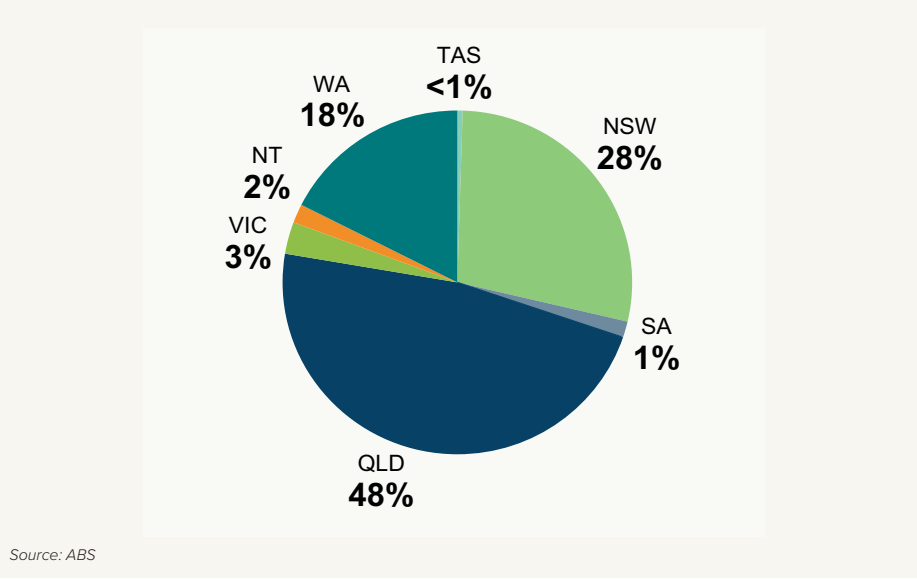
Source: AUSVEG

Pumpkins are grown in many states of Australia, with the majority of production occurring in New South Wales and Queensland.

PRODUCTION WINDOW:

Year-round

2021/22 FRESH PUMPKINS PRODUCTION BY STATE



2021/22 FRESH PUMPKINS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	53,625	\$50.6	Low	Low	Low	Low	Low	Low	Low	Low	Low	High	High	High
New South Wales	31,841	\$30.0	High	Low	Low	Low	None	None	Low	Low	Low	Low	Low	High
Western Australia	19,802	\$18.7	Low	Low	Low	Low	None	None	Low	High	High	High	Low	Low
Victoria	3,387	\$3.2	Low	Low	Low	Low	None	None	Low	Low	Low	Low	Low	Low
Northern Territory	2,010	\$1.9	Low	Low	Low	Low	None	None	Low	Low	Low	High	High	Low
South Australia	1,693	\$1.6	Low	Low	Low	Low	None	None	Low	Low	Low	Low	Low	Low
Tasmania	537	\$0.5	Low	Low	Low	Low	None	None	Low	Low	Low	Low	Low	Low

Availability legend: High (Dark Teal), Medium (Light Teal), Low (Yellow), None (Light Grey)

Source: ABS



MAIN PUMPKINS VARIETIES

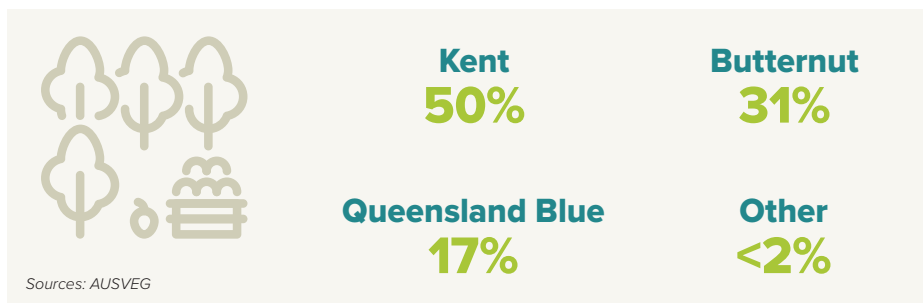
There are large number of pumpkin varieties grown in Australia for the fresh market for the year ending in June 2022. Some of the major varieties include:

Kent, also known as Jap pumpkins, an oval pumpkin with mottled green skin. Kent pumpkins accounted for **50%** of fresh production.

Butternut, a long pumpkin with a creamy yellow skin. Butternut pumpkins accounted for **31%** of fresh production.

Queensland blue, also known as Grey pumpkins, a squat pumpkin with a blueish grey skin colour, Queensland blue pumpkins accounted for **17%** of fresh production.

Other varieties accounted for **2%** of fresh production.



2021/22 FRESH PUMPKINS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Jap/Kent	54,704	High	High	High	High	Medium	Medium	Medium	High	High	High	High	High
Butternut	33,917	High	High	High	High	High	High	High	High	High	High	High	High
Grey	18,599	High	High	High	High	Medium	Medium	Medium	High	High	High	High	High
Other	2,188	Medium	Medium	High	High	High	High	High	High	High	High	Medium	Medium

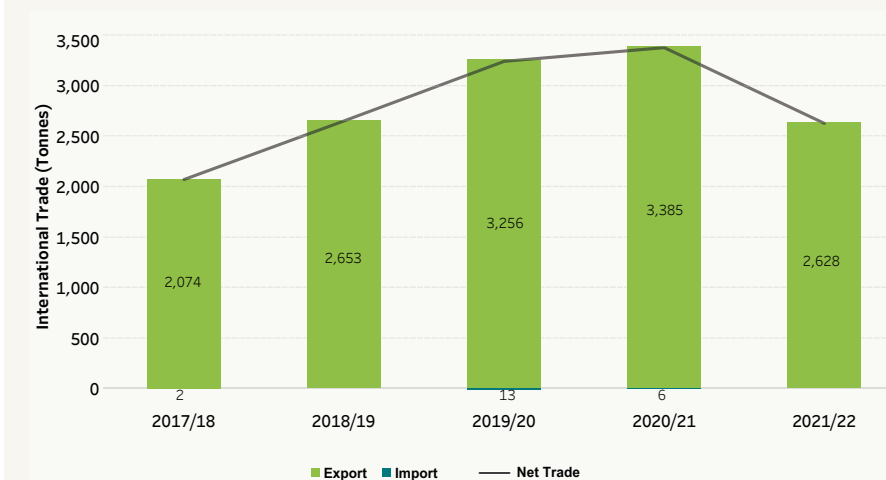
Availability legend: High Medium Low None

Sources: AUSVEG

Fresh Pumpkins International Trade

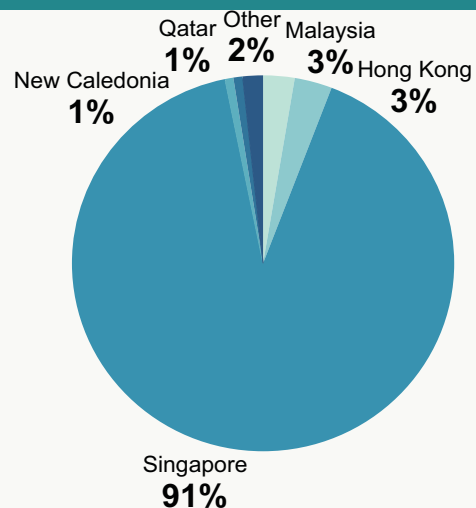
FRESH PUMPKINS INTERNATIONAL TRADE

Australia is a net exporter of fresh production of fresh pumpkin, with only minimal imports. For the year ending June 2022, Australia exported **2,628 tonnes** of fresh pumpkins. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH PUMPKINS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **91%** of exported fresh pumpkins were sent to **Singapore**, as profiled in the chart above.

FRESH PUMPKINS 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
New South Wales	13	5	-	Queensland	1,495	1,632	1,205
Queensland	< 0.5	1	-	Victoria	273	491	736
Other	< 0.5	< 0.5	-	Western Australia	777	822	291
TOTAL	13	6	-	New South Wales	596	404	261
				South Australia	94	16	108
				Other	21	21	28
				TOTAL	3,256	3,385	2,628

FRESH PUMPKINS 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
Bangladesh	13	5	-	Singapore	2,564	2,611	2,392
Vietnam	-	1	-	Hong Kong	141	147	83
India	< 0.5	-	-	Malaysia	177	148	70
Other	< 0.5	< 0.5	-	Qatar	25	58	20
TOTAL	13	6	-	New Caledonia	1	20	19
				Other	349	401	45
				TOTAL	3,256	3,385	2,628

Source: GTA

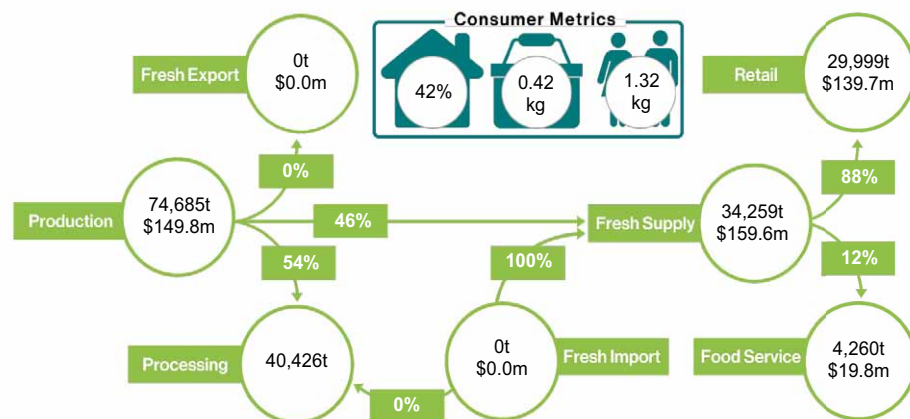
Sweet Corn





Fresh Sweet Corn Overview

FRESH SWEET CORN SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

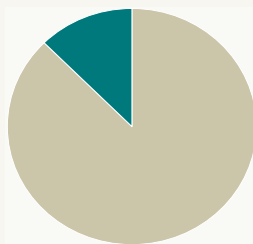
TOTAL PRODUCTION:



\$149.8M

74,685t produced and valued at **\$149.8M** with 54% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was **\$159.6M**, with **\$139.7M** distributed into retail and **\$19.8M** into food service.

CONSUMER METRICS:



42%

42% of Australian households purchased sweet corn, buying an average of **419g** per shopping trip.

PER CAPITA CONSUMPTION:

1.32kg



in 2021/22 based on the volume supplied.

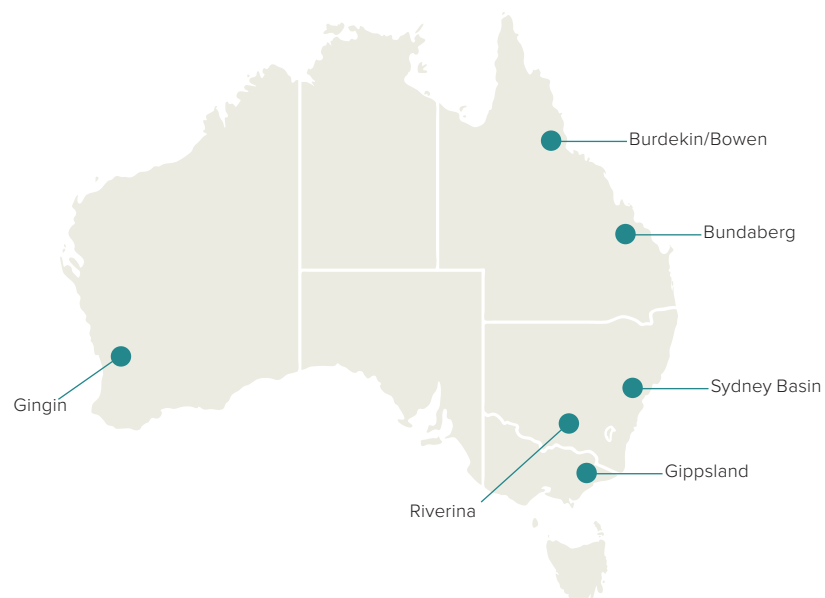
YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	73,212	77,090	+5%	74,685	-3%
Production (\$m)	\$113.8	\$131.9	+16%	\$149.8	+14%
Production area (Ha)	6,225	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	32,969	35,362	+7%	34,259	-3%
Fresh Supply Wholesale Value (\$m)	\$120.9	\$140.5	+16%	\$159.6	+14%
Supply per Capita (kg)	1.28	1.37	+7%	1.32	-4%
Retail Supply (t)	29,047	31,020	+7%	29,999	-3%
Retail Supply Wholesale Value (\$m)	\$106.5	\$123.3	+16%	\$139.7	+13%
Food Service Supply (t)	3,921	4,343	+11%	4,260	-2%
Food Service Wholesale Value (\$m)	\$14.4	\$17.3	+20%	\$19.8	+15%

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



Fresh Sweet Corn Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

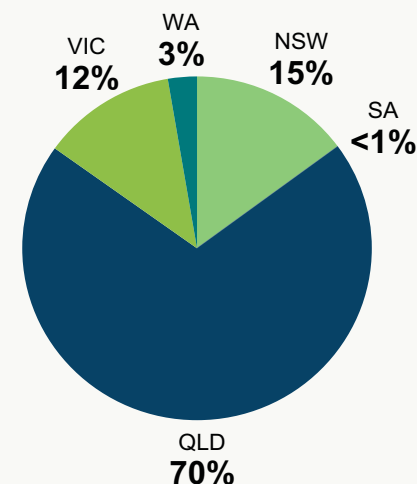
Sweet corn refers to the sweet variety of corn that is grown for direct human consumption, and does not include maize or other similar broad acre corn crops. The majority of production occurs in Queensland.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH SWEET CORN PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH SWEET CORN SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	52,280	\$104.8	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium
New South Wales	11,121	\$22.3	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium
Western Australia	1,987	\$4.0	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium
Victoria	9,297	\$18.6	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium
South Australia	1	\$0.0	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: AUSVEG

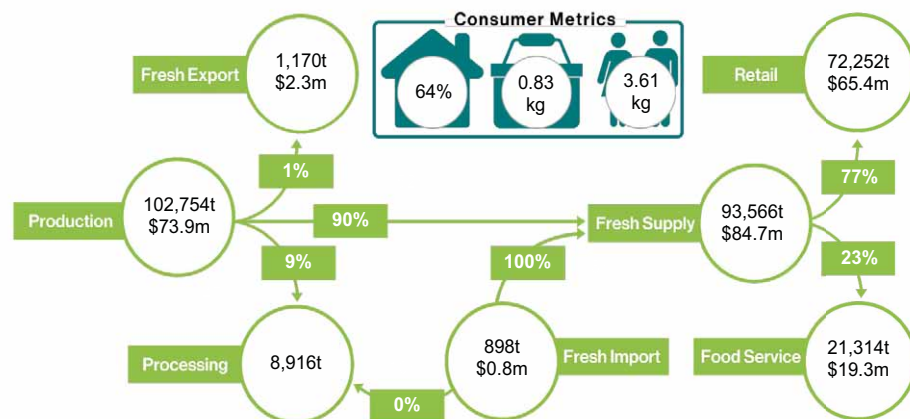
Sweetpotato

A photograph of several sweetpotatoes on a light-colored wooden surface. Two whole sweetpotatoes are in the background, and several slices are in the foreground. The slices show a bright orange interior. The word 'Sweetpotato' is overlaid in large white text.



Fresh Sweetpotato Overview

FRESH SWEETPOTATO SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: AC; Australian Sweet Potato Association (ASPGA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

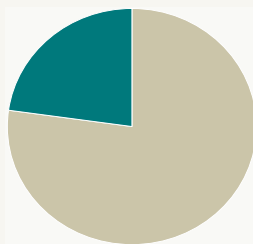
TOTAL PRODUCTION:



\$73.9M

102,754t produced and valued at **\$73.9M** with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 77% ■ Food Service 23%

The wholesale value of the fresh supply was **\$84.7M**, with **\$65.4M** distributed into retail and **\$19.3M** into food service.

CONSUMER METRICS:



64%

64% of Australian households purchased sweetpotato, buying an average of **833g** per shopping trip.

PER CAPITA CONSUMPTION:

3.61kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	106,748	104,239	-2%	102,754	-1%
Production (\$m)	\$83.0	\$91.5	+10%	\$73.9	-19%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	2,401	1,284	-47%	1,170	-9%
Fresh Export Value (\$m)	\$3.7	\$3.1	-15%	\$2.3	-25%
Fresh Import Volume (t)	795	695	-13%	898	+29%
Fresh Import Value (\$m)	\$0.9	\$0.8	-11%	\$0.8	+1%
Fresh Supply (t)	95,881	94,606	-1%	93,566	-1%
Fresh Supply Wholesale Value (\$m)	\$94.0	\$104.4	+11%	\$84.7	-19%
Supply per Capita (kg)	3.72	3.67	-1%	3.61	-2%
Retail Supply (t)	75,795	74,201	-2%	72,252	-3%
Retail Supply Wholesale Value (\$m)	\$74.3	\$81.9	+10%	\$65.4	-20%
Food Service Supply (t)	20,086	20,405	+2%	21,314	+4%
Food Service Wholesale Value (\$m)	\$19.7	\$22.5	+14%	\$19.3	-14%

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



Fresh Sweetpotato Production

MAJOR PRODUCTION AREAS



Source: ASPGA

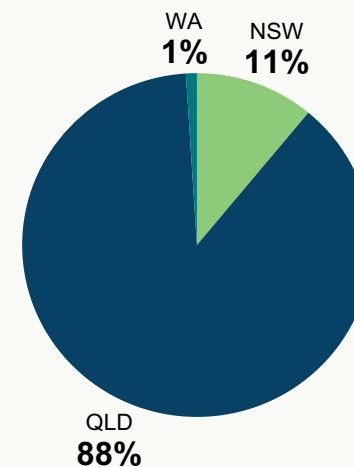
The majority of sweetpotato grown in Australia are produced in Queensland, with smaller volumes grown in Western Australia, Northern South Wales and the Northern Territory.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH SWEETPOTATO PRODUCTION BY STATE



Source: ASPGA

2021/22 FRESH SWEETPOTATO SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	90,424	\$65.0	High	High	High	Medium	Medium	Medium	Medium	High	High	High	High	High
New South Wales	11,303	\$8.1	None	None	None	None	None	None	Low	Medium	High	Medium	Medium	Medium
Western Australia	1,028	\$0.7	None	None	None	Low	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: AUSVEG



MAIN SWEETPOTATO VARIETIES

There are three main sweetpotato varieties grown in Australia for the fresh market. These varieties includes:

Gold sweetpotato, also known as the Beauregard which has a rose/gold smooth skin with a moderate deep orange flesh. Gold sweetpotato are accounted for **90%** of fresh production.

Red sweetpotato, also known as Northern Star which has a red purple skin, with bright white flesh. Red sweetpotato are accounted for **7%** of fresh production.

Purple sweetpotato, has white skin, with white and purple flesh. Purple sweetpotato are accounted for **3%** of fresh production.



2021/22 FRESH SWEETPOTATO SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Garden/Processed	25,060	High	High	High	High	High	High	High	High	High	High	High	High
Snow Peas	5,099	High	High	High	High	High	High	High	High	High	High	High	High
Sugar Snap	971	High	High	High	High	High	High	High	High	High	High	High	High

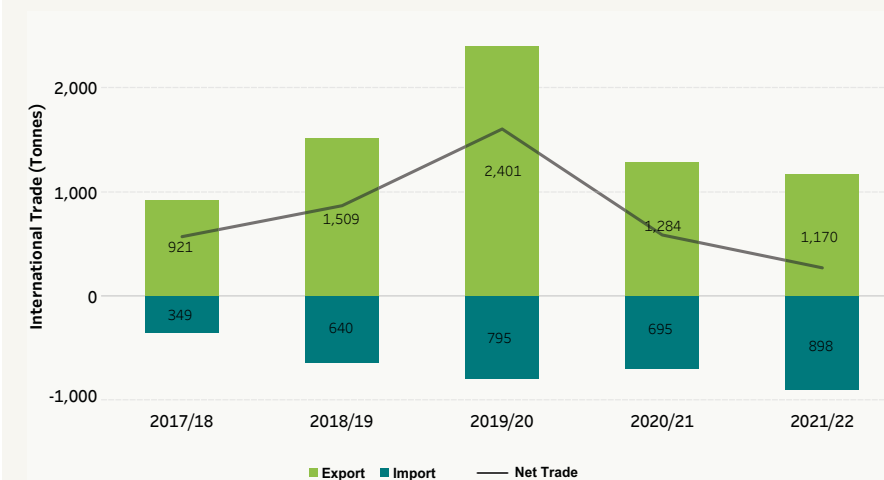
Availability legend: High Medium Low None

Sources: ASPGA

Fresh Sweetpotato International Trade

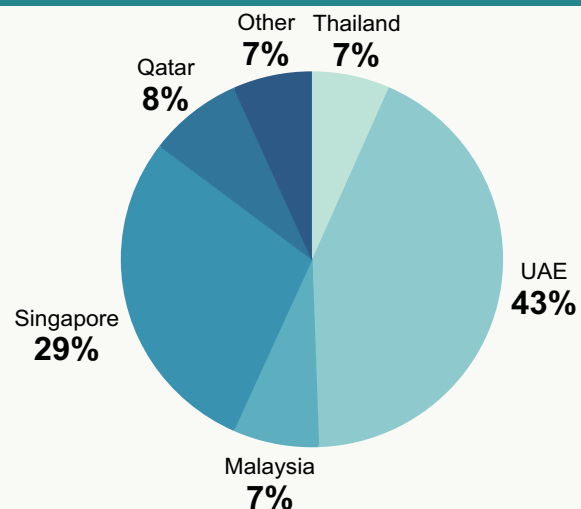
FRESH SWEETPOTATO INTERNATIONAL TRADE

Australia is a net exporter of fresh sweetpotato, with smaller amounts of imports. For the year ending June 2022, Australia exported **1,170 tonnes** of fresh sweetpotato. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH SWEETPOTATO EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **43%** of exported fresh sweetpotato were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

FRESH SWEETPOTATO 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
Queensland	697	594	609	Queensland	2,122	1,044	911
New South Wales	86	97	288	New South Wales	196	179	233
Victoria	12	5	1	Victoria	72	51	22
Western Australia	1	< 0.5	-	South Australia	< 0.5	1	4
Other	< 0.5	< 0.5	-	Western Australia	10	6	< 0.5
TOTAL	795	695	898	Other	< 0.5	3	< 0.5
				TOTAL	2,401	1,284	1,170

FRESH SWEETPOTATO 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
China	722	629	896	UAE	866	520	502
South Korea	1	1	2	Singapore	198	354	335
Tonga	71	65	-	Qatar	159	92	93
Taiwan	1	< 0.5	-	Malaysia	98	101	85
Tanzania	-	< 0.5	-	Thailand	99	< 0.5	77
Other	< 0.5	< 0.5	-	Other	981	216	78
TOTAL	795	695	898	TOTAL	2,401	1,284	1,170

Source: GTA

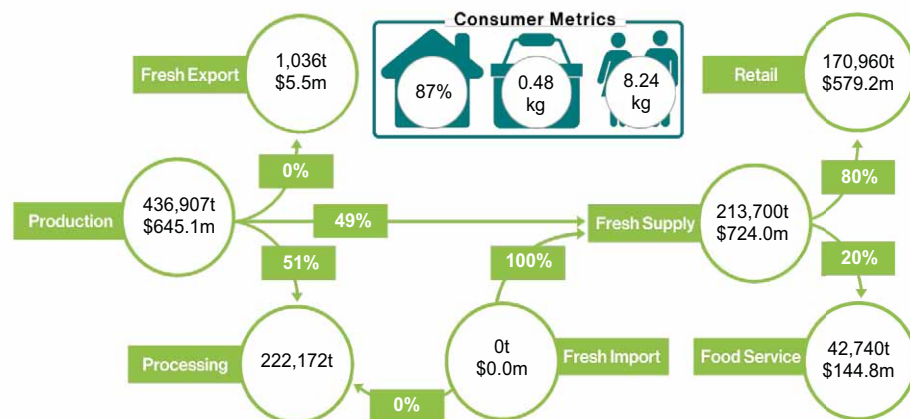
Tomatoes





Fresh Tomatoes Overview

FRESH TOMATOES SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: ABS; AC; Australian Processing Tomato Research Council (APTRC); AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

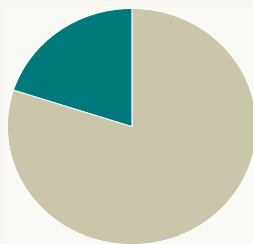
TOTAL PRODUCTION:



\$645.1M

436,907t produced and valued at **\$645.1M** with 51% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 80% ■ Food Service 20%

The wholesale value of the fresh supply was **\$724M**, with **\$579.2M** distributed into retail and **\$144.8M** into food service.

CONSUMER METRICS:



87%

87% of Australian households purchased tomatoes, buying an average of **480g** per shopping trip.

PER CAPITA CONSUMPTION:

8.24kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	460,789	472,209	+2%	436,907	-7%
Production (\$m)	\$584.4	\$562.2	-4%	\$645.1	+15%
Production area (Ha)	3,917	-	-	-	-
Fresh Export Volume (t)	658	683	+4%	1,036	+52%
Fresh Export Value (\$m)	\$2.9	\$3.6	+26%	\$5.5	+53%
Fresh Import Volume (t)	790	59	-92%	-	-100%
Fresh Import Value (\$m)	\$1.2	\$0.1	-87%	\$-	-100%
Fresh Supply (t)	250,444	239,023	-5%	213,700	-11%
Fresh Supply Wholesale Value (\$m)	\$660.1	\$628.6	-5%	\$724.0	+15%
Supply per Capita (kg)	9.71	9.28	-4%	8.24	-11%
Retail Supply (t)	202,789	191,219	-6%	170,960	-11%
Retail Supply Wholesale Value (\$m)	\$534.5	\$502.8	-6%	\$579.2	+15%
Food Service Supply (t)	47,655	47,805	<1%	42,740	-11%
Food Service Wholesale Value (\$m)	\$125.6	\$125.7	<1%	\$144.8	+15%

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

Fresh Tomatoes Production

MAJOR PRODUCTION AREAS

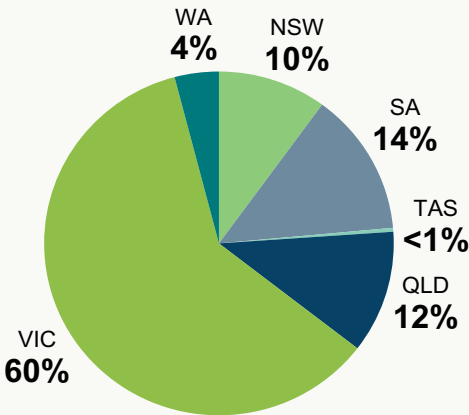


Source: AUSVEG

Tomatoes are grown in most states of Australia, with the majority of production occurring in Victoria and South Australia. Traditionally most tomatoes were produced outdoors in Queensland. In recent years, more tomatoes have been grown in high-tech glasshouses.



2021/22 FRESH TOMATOES PRODUCTION BY STATE



Source: AUSVEG

2021/22 FRESH TOMATOES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	264,191	\$163.2												
South Australia	58,983	\$201.6												
Queensland	50,384	\$95.4												
New South Wales	43,881	\$141.5												
Western Australia	17,816	\$38.9												
Tasmania	1,653	\$4.5												

Availability legend: High Medium Low None

Source: AUVEG

MAIN TOMATOES TYPES

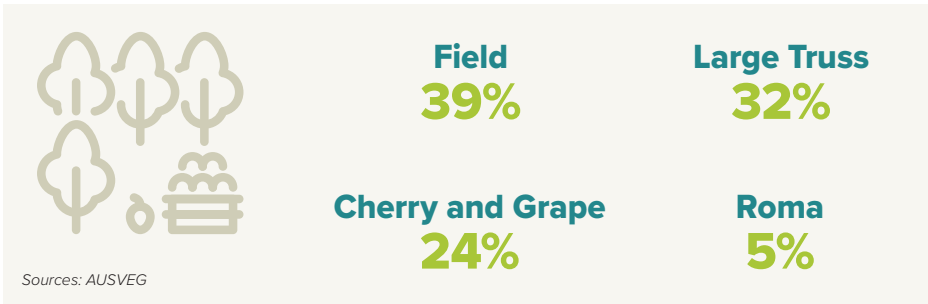
There are number of tomato types grown in Australia for the year ending June 2022, with these types grouping a number of varieties. These major types include:

Field, a round to oval tomato with a red skin, these varieties are most commonly grown outdoors. Feild tomatoes accounted for **39%** of fresh production.

Large Truss, a round to oval tomato with a red skin and typically sold with the vine still attached. Large truss tomatoes are most commonly grown in glasshouses, and accounted for **32%** of fresh production.

Cherry and Grape, a smaller round to oval shaped tomatoes with a red skin, these varieties are grown both outdoors or more commonly in glasshouses. These types accounted for **24%** of fresh production.

Roma, including baby roma tomatoes, an oval egg-shaped tomato with red skin. These varieties accounted for **5%** of fresh production.

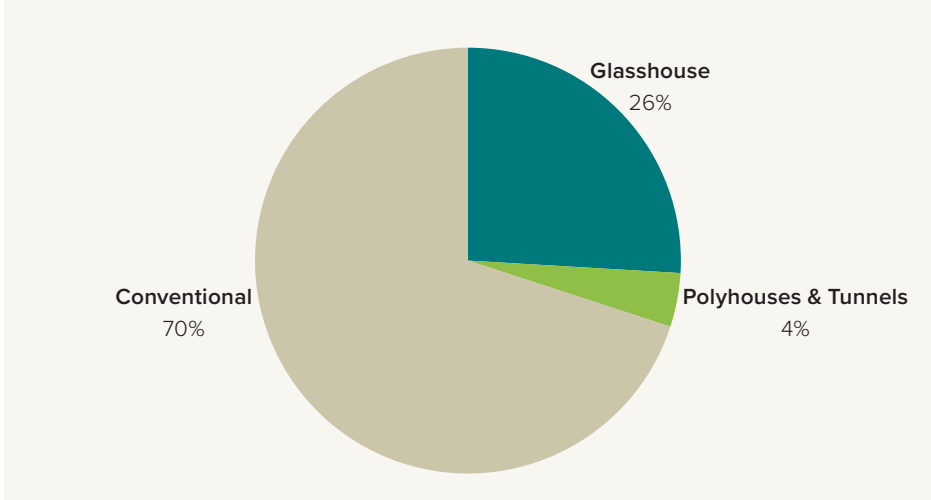


2021/22 FRESH TOMATOES SEASONALITY BY TYPE													
Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Field	83,561												
Large Truss	67,886												
Cherry/Grape	52,366												
Roma	10,923												
Processing	222,172												

Availability legend: High Medium Low None

Sources: APTRC; AUSVEG; (Freshlogic Analysis)

2021/22 FRESH TOMATOES PRODUCTION BY SYSTEM



Production of tomatoes in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 26%**, **Polyhouses & Tunnels 4%** and **Conventional 70%**.

2021/22 FRESH TOMATOES PRODUCTION SYSTEM BY STATE

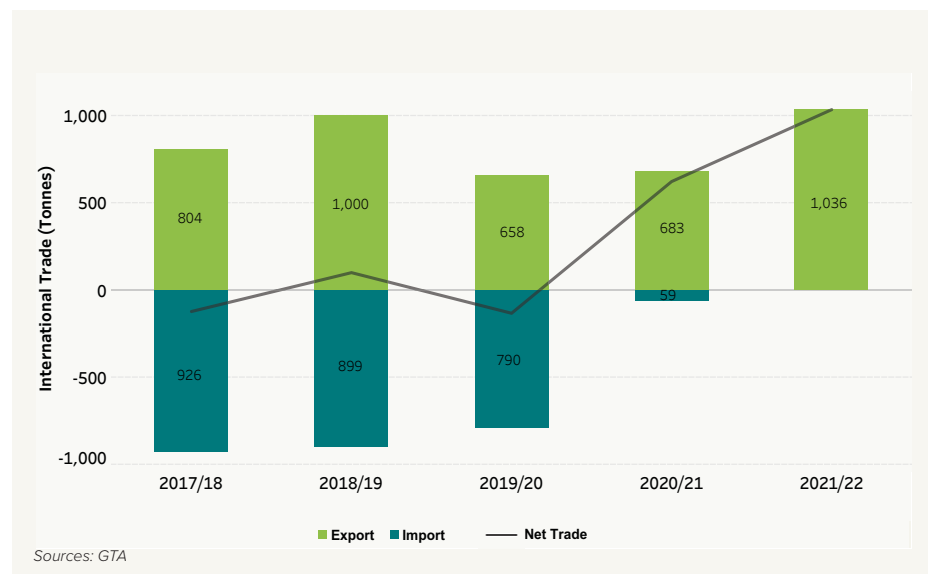
State	Glasshouse			Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	64	31,510	\$116.6	11	2,500	\$7.7	-	9,871	\$17.3
Victoria	75	32,375	\$119.8	6	1,200	\$3.7	-	230,616	\$39.8
Queensland	7	2,342	\$8.7	10	2,000	\$6.1	-	46,042	\$80.6
Western Australia	4	1,790	\$6.6	11	3,250	\$9.9	-	12,776	\$22.4
South Australia	94	44,980	\$166.4	32	8,120	\$24.9	-	5,883	\$10.3
Tasmania	1	308	\$11	4	800	\$2.4	-	545	\$1.0
Northern Territory	0	0	\$-	0	0	\$-	-	0	\$-



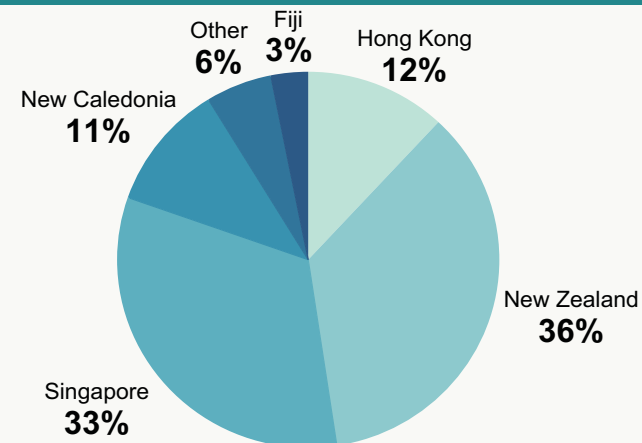
Fresh Tomatoes International Trade

FRESH TOMATOES INTERNATIONAL TRADE

Australia has traditionally been a net importer of fresh tomatoes, with imports decreasing in years. For the year ending June 2022, Australia exported **1,036 tonnes** of fresh tomatoes. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH TOMATOES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **36%** of exported fresh tomatoes were sent to **New Zealand**, as profiled in the chart above.

FRESH TOMATOES 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
New South Wales	317	52	-	Queensland	359	234	482
Victoria	111	8	-	New South Wales	196	260	359
Queensland	362	-	-	Victoria	90	154	166
TOTAL	790	59	-	South Australia	< 0.5	33	13
				Western Australia	11	2	1
				Other	< 0.5	-	15
				TOTAL	658	683	1,036

FRESH TOMATOES 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
New Zealand	790	52	-	New Zealand	186	92	370
Vietnam	-	5	-	Singapore	236	276	340
US	-	3	-	Hong Kong	79	119	123
Other	-	< 0.5	-	New Caledonia	45	86	113
TOTAL	790	59	-	Fiji	37	14	32
				Other	74	96	58
				TOTAL	658	683	1,036

Source: GTA

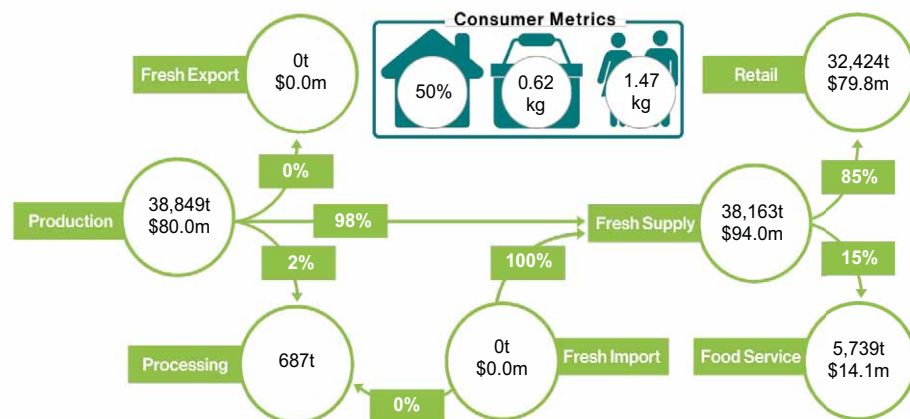
Zucchini





Fresh Zucchini Overview

FRESH ZUCCHINI SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

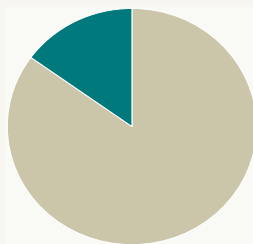
TOTAL PRODUCTION:



\$80M

38,849t produced and valued at **\$80M** with 2% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 80% ■ Food Service 20%

The wholesale value of the fresh supply was **\$94M**, with **\$79.8M** distributed into retail and **\$14.1M** into food service.

CONSUMER METRICS:



50%

50% of Australian households purchased zucchini, buying an average of **618g** per shopping trip.

PER CAPITA CONSUMPTION:

1.47kg



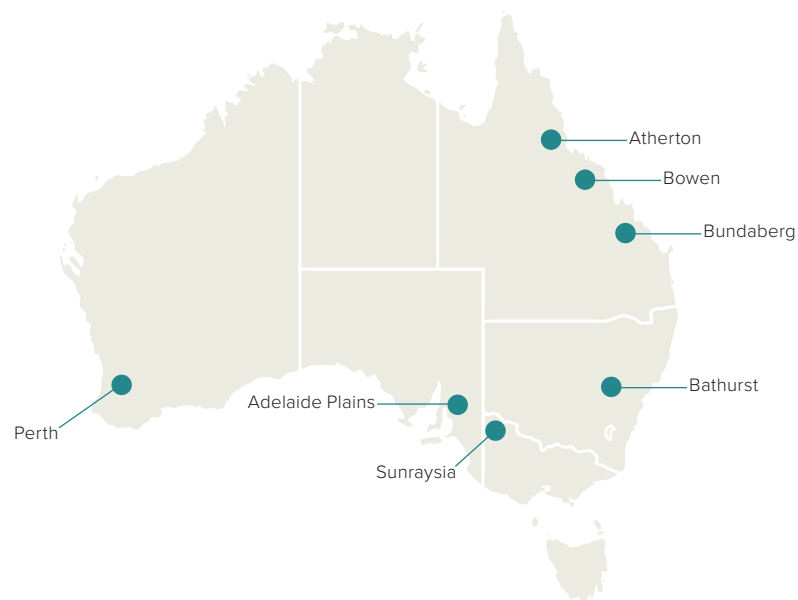
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	44,078	41,399	-6%	38,849	-6%
Production (\$m)	\$86.6	\$84.4	-3%	\$80.0	-5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	43,299	40,667	-6%	38,163	-6%
Fresh Supply Wholesale Value (\$m)	\$101.7	\$99.1	-3%	\$94.0	-5%
Supply per Capita (kg)	1.68	1.58	-6%	1.47	-7%
Retail Supply (t)	37,327	34,610	-7%	32,424	-6%
Retail Supply Wholesale Value (\$m)	\$87.7	\$84.3	-4%	\$79.8	-5%
Food Service Supply (t)	5,972	6,057	+1%	5,739	-5%
Food Service Wholesale Value (\$m)	\$14.0	\$14.8	+5%	\$14.1	-4%

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

Fresh Zucchini Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

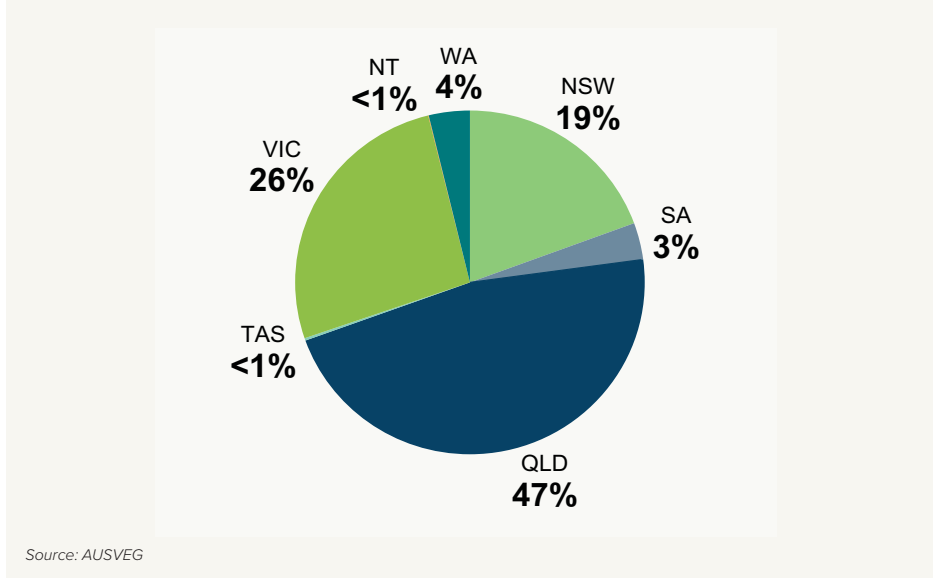
Zucchini is grown in most states of Australia, with the majority of production occurring in Queensland and Victoria.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH ZUCCHINI PRODUCTION BY STATE



2021/22 FRESH ZUCCHINI SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	18,131	\$37.3												
Victoria	10,264	\$21.1												
New South Wales	7,535	\$15.5												
Western Australia	1,468	\$3.0												
South Australia	1,344	\$2.8												
Tasmania	87	\$0.2												

Availability legend: High Medium Low None

Source: AUSVEG