



Australian Horticulture Statistics Handbook

Fruit

2017/18

Disclaimer

Any views contained in this publication do not necessarily represent the views of Horticulture Innovation Australia Limited (Hort Innovation) or its commitment to a particular course of action. Hort Innovation makes no representations and expressly disclaims all warranties (to the extent permitted by law) about the accuracy, completeness, or currency of information in the Australian Horticulture Statistics Handbook 2017/18 (“the Handbook”).

Reliance on any information provided by Hort Innovation is entirely at your own risk. Hort Innovation is not responsible for, and will not be liable for, any loss, damage, claim, expense, cost (including legal costs) or other liability arising in any way, including from any Hort Innovation or other person’s negligence or otherwise from your use or non-use of the Handbook, or from reliance on information contained in the material or that Hort Innovation provides to you by any other means.

Copyright © Horticulture Innovation Australia Limited 2019

Copyright subsists in the Handbook. Hort Innovation owns the copyright, other than as permitted under the Copyright ACT 1968 (Cth). The Handbook (in part or as a whole) cannot be reproduced, published, communicated or adapted without the prior written consent of Hort Innovation. Any request or enquiry to use the Handbook should be addressed to:

Communications Manager
Horticulture Innovation Australia Limited
Level 8, 1 Chifley Square
Sydney NSW 2000
Australia
Email: communications@horticulture.com.au
Phone: 02 8295 2300

The Australian Horticulture Statistics Handbook 2017/18 has been funded by Horticulture Innovation Australia Limited using the across industry levy and funds from the Australian Government.

This Handbook is an analysis that combines all available data on production, international trade, processing volumes and fresh market distribution in order to produce statistics on 75 horticultural categories over the year ending 30 June 2018.

Summary of Approach

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

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

- Farm gate production quantity has been informed through a number of sources, including Hort Innovation funded data projects, horticultural government levy data where available, and refined through consultation with informed industry bodies. The corresponding value of production is calculated from wholesale pricing information, before removing known logistical, marketing and wholesale costs to reflect product value at the farm gate.
- Export and import trade volume and value is based on Australian Customs data as reported in IHS Global Trade Atlas data.
- Processing data has been obtained through consultation with industry processors¹.

See pages 16 and 17 under 'research method' for a detailed description on this Handbook's methodology.

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

This publication covers the year ending 30 June 2018 and examines the production and distribution of horticulture products. Some of the key influences on horticultural production and distribution over this period are summarised below.

Production conditions recovered from the previous year's disruptions with impacts most apparent on the supply of fresh vegetables. Some fruit and berry crops were adversely impacted by unseasonal frosts. In these conditions the wholesale value per kg of fresh fruit and vegetables supplied to the local market decreased by 2.0% to \$2.42 per kg.

The supply of product into the domestic food market is influenced by the conditions in the retail channel. The drivers of these conditions which were centred on expanding retail entrants, growth in direct to home channels and increases in eating away from home, all combined to lift the level of retail competition.

Total fresh horticulture exports were valued at **\$2.15 billion** in 2017/18, 6% higher than the previous year. The increase in export value was primarily driven by citrus exports, with cherries, summerfruit, walnuts and carrots also showing strong growth.

Export market optimism has continued to flow into business confidence and is now reflected in the value associated to those with export market exposure.

Introduction.....	7	Mangoes.....	136	Leafy Asian Vegetables.....	346
Abbreviations.....	8	Melons Overview.....	142	Leafy Salad Vegetables.....	352
Definitions.....	9	Muskmelons.....	144	Leeks.....	358
How to use this book.....	10	Watermelons.....	150	Mushrooms.....	364
Research Method.....	16	Nashi.....	156	Onions.....	370
Data Sharing—List of Projects.....	20	Passionfruit.....	160	Parsnips.....	376
International Trade		Papaya/Pawpaw.....	164	Peas.....	380
Total Imports.....	22	Pears.....	170	Potatoes.....	386
Total Exports.....	23	Persimmons.....	176	Pumpkins.....	392
Fresh Imports by region.....	24	Pineapples.....	182	Sweet Corn.....	398
Fresh Exports by region.....	26	Summerfruit Overview.....	186	Sweetpotatoes.....	402
Fresh Imports by state.....	28	Apricots.....	188	Tomatoes.....	408
Fresh Exports by state.....	30	Nectarines/Peaches.....	194	Zucchini.....	414
		Plums.....	200		
Data Tables		Table Grapes.....	206	Nuts	
Production.....	32	Dried Grapes.....	212	Category Overview.....	418
Value of Production.....	34	Prunes.....	216	Almonds.....	420
Volume of Fresh Exports.....	36	Other Dried Tree Fruit.....	220	Chestnuts.....	426
Value of Fresh Exports.....	38	Canning Fruit.....	224	Hazelnuts.....	430
Volume of Fresh Imports.....	40	Olives.....	228	Macadamias.....	436
Value of Fresh Imports.....	42			Pecans.....	442
Fresh Supply.....	44	Vegetables		Pistachios.....	448
Wholesale Value.....	46	Category Overview.....	232	Walnuts.....	454
All Horticulture		Artichokes.....	234	Other Categories	
Horticulture Overview.....	48	Asparagus.....	240	Category Overview.....	460
Fruit		Beans.....	246	Cut Flowers.....	462
Category Overview.....	52	Beetroot.....	252	Nursery.....	468
Apples.....	54	Broccoli/Baby Broccoli.....	258	Turf.....	474
Avocados.....	60	Brussels Sprouts.....	264		
Bananas.....	66	Cabbages.....	270		
Berries Overview.....	70	Capsicums.....	276		
Blueberries.....	72	Carrots.....	282		
Rubus Berries.....	78	Cauliflowers.....	288		
Strawberries.....	84	Celery.....	292		
Cherries.....	90	Chilies.....	296		
Citrus Fruit Overview.....	96	Cucumbers.....	302		
Grapefruit.....	98	Eggplants.....	308		
Lemons/Limes.....	104	Eng, Spinach/Silverbeet/Kale.....	314		
Mandarins.....	110	Fresh Herbs Overview.....	320		
Oranges.....	116	Fennel.....	322		
Custard Apples.....	122	Parsley and other Herbs.....	326		
Kiwifruit.....	126	Garlic.....	330		
Lychees.....	132	Ginger.....	336		
		Head Lettuces.....	342		

Availability of valid statistical information is a key enabler across horticulture. The Australian Horticulture Statistics Handbook for the year ending 30 June 2018, is presented by Horticulture Innovation Australia for the purpose of consolidating horticulture statistical information for use by horticulture industry members and other stakeholders.

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

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

Where additional information has led to a change in the previously quoted value from the 2016/17 edition for a category, this has been noted on the page of the relevant category.

This edition of the Handbook is made available electronically via the Hort Innovation website, at www.horticulture.com.au

Hort Innovation will evaluate the uptake and usage of the Handbook to ensure that future editions are delivered according to user needs.

Any comments regarding the Handbook should be forwarded to Hort Innovation at: feedback@horticulture.com.au

The 2017/18 Handbook has been compiled by Freshlogic.

Abbreviations

% YoY	% increase/decrease this year compared to last year
\$	Australian Dollars
\$b	Billion Australian Dollars
\$m	Million Australian Dollars
2017/18	Year ending 30 June 2018
ABS	Australian Bureau of Statistics
CIF	Cost of Insurance and Freight (a measure of import value)
FOB	Free On Board (a measure of export value)
g	Grams
GTA	Global Trade Atlas
kg	Kilograms
KWE	Kernel Weight Equivalent
ha	Hectares
ISWE	In-Shell Weight Equivalent
L	Litres
m ²	Metres squared (a measure of area)
m m ²	Million metres squared (a measure of area)
ML	Mega Litres (1 million litres)
N/A	Not Available
t	Tonnes (1 thousand kilograms)

States

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

Countries

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

Definitions

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

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

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

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

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

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

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

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

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

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

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

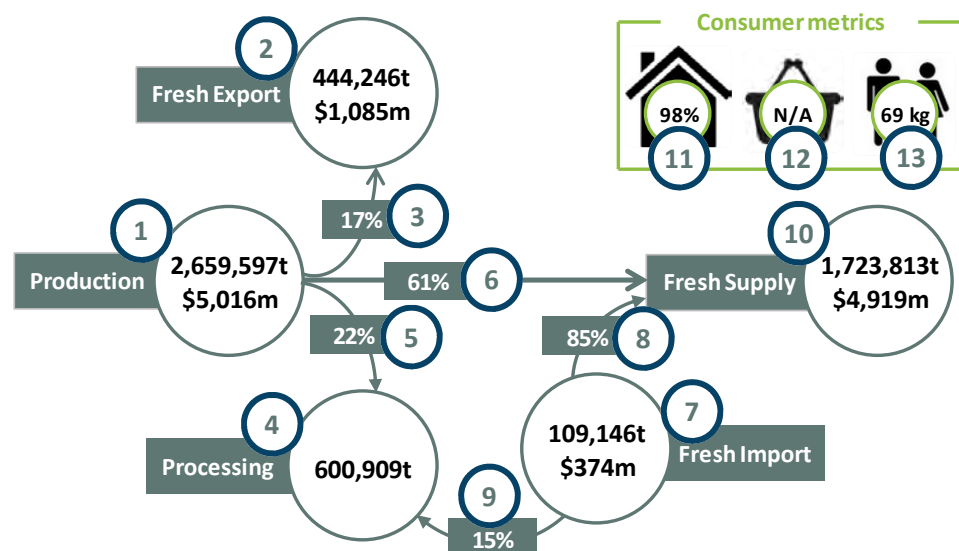
Kernel (Nut categories) —A measure of volume that only includes the edible kernel.

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

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

Fresh supply chain—Fruit and Vegetables

This example supply chain outlines the flow of a fruit or vegetable category over the year ending June 2018. It contains the following elements:

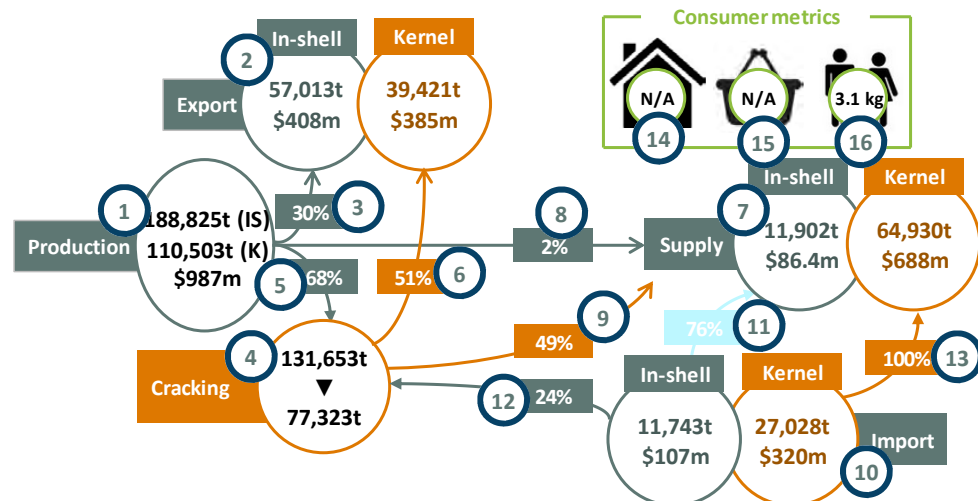


1. **Production.** This is the volume of the category grown in Australia over the year ending June 2018. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
2. **Fresh Exports.** The volume in tonnes of the production that was exported in a fresh form, and the value in million dollars received.
3. **Export Share.** The percentage share of production that was exported.

4. **Processing.** The volume in tonnes of the production that was sent to be processed (such as juicing, freezing or preserving etc).
5. **Processing Share.** The percentage share of production that was processed.
6. **Fresh Supply Share.** The percentage share of production that was sent to the Australian fresh market.
7. **Fresh Imports.** The volume in tonnes of the category that was imported in a fresh format from another country, and the value in million dollars paid to import.
8. **Import Fresh Supply Share.** The percentage share of fresh imports that was sent to the Australian fresh market.
9. **Import Processing Share.** The percentage share of fresh imports that was sent to be processed.
10. **Fresh Supply.** The volume of the category available to the Australian fresh market. It includes both Production that was sold into the fresh market, as well as Fresh Imports that were sold into the fresh market. This profiles the **Fresh Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Fresh Supply at a wholesale market level.
11. **Household Penetration.** The percentage of Australian households who bought the category at least once at retail, to be consumed either in or out of the home, over the year ending June 2018. 'Out of home' consumption is food prepared away from the home typically via food service channels and not prepared from ingredients purchased via retail.
12. **Average Purchase Quantity.** The average quantity purchased at retail per shopping trip by Australian households over the year ending June 2018. A shopping trip refers to a trip where this category is purchased.
13. **Fresh Supply per Capita.** The volume of fresh supply available to the Australian population, on a per capita basis.

Supply chain—Nuts & Olives

This example supply chain outlines the flow of a nut category over the year ending June 2018. Because nuts are sold both in an **In-Shell** and **Kernel** format, the nut supply chain profiles both elements, indicated by **green** for **In-Shell** and **orange** for **Kernel**. The chain contains the following elements:



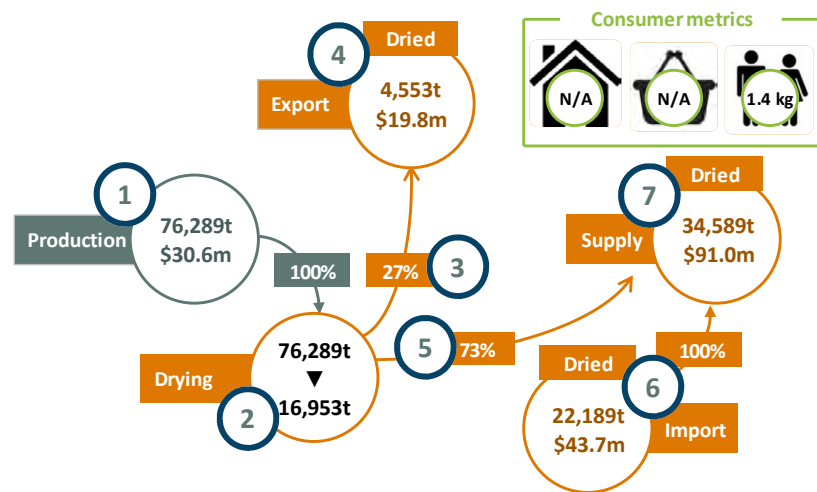
- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2018. This profiles the **Production** (volume in tonnes), in both **In-Shell** (written in **green** and denoted by **IS**) and the **Kernel** equivalent of this volume after cracking (written in **orange** and denoted by **K**), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**.
- 2. Exports.** The volume in tonnes of the production that was exported, and the value in million dollars received. This profiles both **In-Shell** exports and **Kernel** exports.
- 3. In-Shell Export Share.** The percentage share of **In-Shell** production that was exported.
- 4. Cracking.** The volume in tonnes of the **In-Shell** production and imported **In-Shell** product that was sent to be cracked so as to produce kernel. This profiles both the **In-Shell** volume in, and the **Kernel** volume out.

- 5. Cracking Share.** The percentage share of **In-Shell** production that was cracked.
- 6. Kernel Export Share.** The percentage share of cracked **Kernel** that was exported.
- 7. Supply.** This is the volume of the category available to the Australian market. It includes both Production that was sold into the market, as well as Imports that were sold into the market. This profiles the **Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Supply at a wholesale market level. It covers both **In-Shell** and **Kernel** supply.
- 8. In-Shell Supply Share.** The volume in tonnes of the **In-Shell** Production that was supplied to the market.
- 9. Kernel Supply Share.** The volume in tonnes of cracked **Kernel** that was supplied to the market.
- 10. Imports.** The volume in tonnes of the category that was imported from another country, and the value in million dollars paid to import. Profiles both **In-Shell** and **Kernel** imports.
- 11. In-Shell Import Supply Share.** The percentage share of **In-Shell** imports that was sent to the Australian market.
- 12. In-Shell Import Cracking Share.** The percentage share of **In-Shell** imports that was sent to be cracked.
- 13. Kernel Import Supply Share.** The percentage share of **Kernel** imports that was sent to the Australian market.
- 14. Household Penetration.** The percentage of Australian households who bought the category at least once at retail, to be consumed either in or out of the home, over the year ending June 2018. See page 11 for full definition.
- 15. Average Purchase Quantity.** The average quantity purchased at retail per shopping trip by Australian households over the year ending June 2018. A shopping trip refers to a trip where this category is purchased.
- 16. Fresh Supply per capita.** The volume of fresh supply available to the Australian population.

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

Processed supply chain—Dried/Canned Fruit

This example supply chain outlines the flow of the three dried/canned fruit categories over the year ending June 2018. It contains the following elements:



- 1. Production.** The volume of the category grown in Australia over the year ending June 2018. This profiles the **Fresh Production** (written in **green**) and as well as the value in million dollars obtained by the producers i.e. the **Value of Production**.
- 2. Drying/Canning.** The volume in tonnes of the **Fresh** production that was sent to be processed. This profiles both the **Fresh** volume in, and the **Processed** volume out (written in **orange**).
- 3. Export Share.** The percentage share of **Processing** that was exported.
- 4. Dried/Canned Exports.** The volume in tonnes of the **Processing** that was exported in a **Processed** form, and the value in million dollars received.
- 5. Supply Share.** The percentage share of **Processing** that was sold locally.
- 6. Dried/Canned Imports.** The volume in tonnes of imported **Processed** product, and the value in million dollars paid to import.
- 7. Supply.** This profiles the **Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Supply at a wholesale market level. It includes both **Processed** production that was sold into the market, as well as **Processed** Imports that were sold into the market.

Data Tables

These tables are provided for each category. They profile key elements over the last three years (for the years ending June 2016, June 2017 and June 2018), as well as the percentage change in value year on year. They contain:

Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,660	11,887	+55%	16,850	+42%
Production (\$m)	\$ 149.6	\$ 245.1	+64%	\$ 309.0	+26%
Production area (Ha)	1,250	1,375	+10%	1,375	-
Fresh Export Volume (t)	254	356	+40%	221	-38%
Fresh Export Value (\$m)	\$ 5.2	\$ 8.5	+62%	\$ 4.4	-48%
Fresh Import Volume (t)	1,432	1,211	-15%	1,234	+2%
Fresh Import Value (\$m)	\$ 29.8	\$ 27.1	-9%	\$ 29.5	+9%
Fresh Supply (t)	7,939	11,811	+49%	16,401	+39%
Fresh Supply Wholesale Value (\$m)	\$ 210.9	\$ 317.1	+50%	\$ 394.4	+24%
Supply per Capita (kg)	0.33	0.48	+46%	0.66	+37%

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

Overview

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

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

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

In calculating the **production** and **volume processed**, a number of data sources have been relied upon. Where available and in most instances, this has been guided by information from Australian government horticultural levies, and refined through consultation with the Industry Representative Bodies and major trading stakeholders (such as processors, wholesalers and distributors) for the particular category.

Information on Australia's **imports and exports** of fresh and processed horticultural commodities has been compiled using the Global Trade Atlas®, an online global trade information database owned and operated by IHS Markit. Information on Australian trade in the Global Trade Atlas® has been compiled

from information provided to the Australian Customs and Border Protection Service. The Import and Export analysis tables for each category identify the import source country under "Imports by country" and the export destination country under "Export by country".

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

Consumer information including percent of households purchasing a category, and average purchase quantities, has been sourced from Freshlogic's *Mealpulse™* consumer survey and *DocketData™* systems. Supply per capita has been calculated as total volume of fresh supply divided by population for the year ending June 2018 according to the ABS. The number of occupied households is assumed at 9.01 million and the population at 24.9 million for the 2017/18 year*.

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

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

Throughout the document when data sources have been relied upon, this has been noted. Some of the more common sources have been abbreviated. The full list of sources has been provided on pages 18 and 19.

*ABS, Australian Demographic Statistics cat. no. 3101.0

**ABS, Agricultural Commodities cat. no. 7121.0

Common Data Sources

Abbreviation	Data Source	Further information
ABS	Agricultural Commodities, Australian Bureau of Statistics	Information from <i>Agricultural Commodities cat. no. 7121.0, 2016-17, 2015-16, 2014-15 and 2013-14 editions has been compiled.</i> <i>Australian Demographic Statistics cat. no. 3101.0 June 2018 edition.</i> <i>2016 Census of Population and Housing</i>
AC	Ausmarket Consultants	Wholesale pricing information from the Adelaide, Brisbane, Melbourne and Sydney wholesale markets.
CFVIWA	Chamber of Fruit and Vegetable Industries of Western Australia	Wholesale pricing information from the Perth wholesale market.
Freshlogic Analysis	THRUChain analysis—Freshlogic	Supply chain modelling system that aligns the volumes of production and international trade with the volumes distributed through processing and all domestic market channels.
GTA	IHS —Global Trade Atlas®	www.gtis.com/gta

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

Data sharing-List of projects

List of projects

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

<u>Project Code</u>	<u>Project Title</u>
AL16003 (Almonds)	<i>Australian Almond Industry Statistics</i>
AP16002 (Apple/Pear)	<i>Apple and Pear Crop Estimates</i>
AV16006 (Avocado)	<i>Avocado Industry and Market Data Capture and Analysis</i>
CH16000 (Chestnuts)	<i>Communication & Adoption Program for the Australian Chestnut Industry</i>
CT15012 (Citrus)	<i>Australian Citrus Industry Innovation & Market Development Program</i>
CU15000 (Custard Apples)	<i>Custard Apple Dispatch System 2</i>
DP15002 (Prunes)	<i>Innovation & Adoption Program for the Australian Prune Industry</i>
MC15005 (Macadamias)	<i>Benchmarking the Macadamia Industry 2015-2018</i>
MC15009 (Macadamias)	<i>Macadamia Crop Forecasting 2015 - 2018</i>
MG13017 (Mangoes)	<i>Capacity Building, Information, Technology & Extension for the Australian Mango Industry</i>
MT15031 (Dried Grapes)	<i>Australian Dried Fruit Communications Program</i>
NY16004 (Nursery)	<i>Nursery industry statistics and research 2016/17</i>

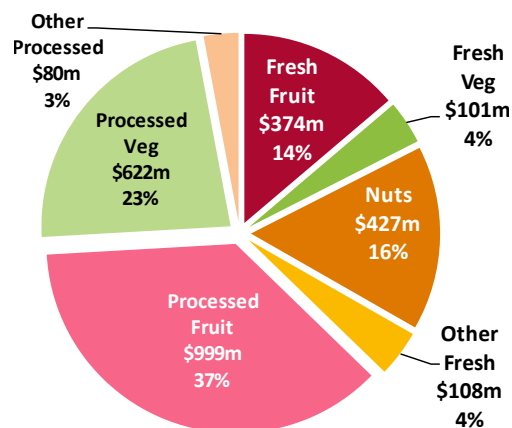
Data sharing-List of projects

<u>Project Code</u>	<u>Project Title</u>
PI13006 (Pineapples)	<i>Study groups enabling industry adaption to pineapple market changes</i>
TM17000 (Tomato)	<i>Processing Tomato Industry Capacity Building</i>
TU16001 (Turf)	<i>Turf industry statistics and research 2016/17</i>
TU17005 (Turf)	<i>Turf industry statistics 2017-18 to 2019-2020</i>
VG15077 (Vegetables)	<i>Financial Performance of Australian Vegetable Farms 2016-17 to 2018-19</i>



Total Imports

For the year ending June 2018, Australia imported **\$2.71 billion** worth of horticultural products. *The values below do not include wine grapes.* Processed fruit was the largest value import grouping. The value of imports by group is profiled in the chart and table below. The table below also includes the **top 3** import categories by value within each group. The value for nuts includes some processed nut products.



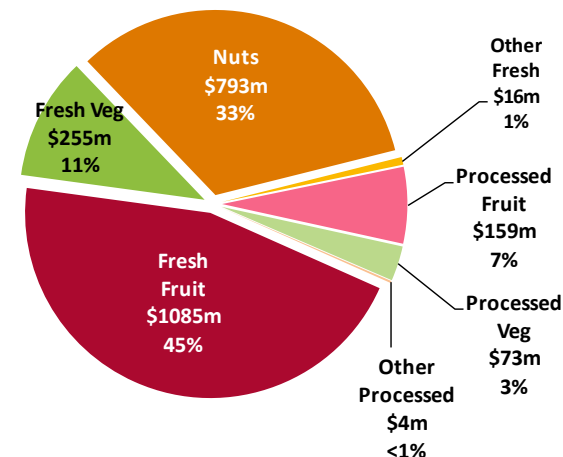
Sources: GTA; (Freshlogic Analysis)

Fresh Fruit\$374.1m	Other Fresh Horticulture\$108.0m
Avocados\$71.7m	Cut Flowers\$70.3m
Grapes\$69.2m	Bulbs\$20.7m
Kiwifruit.....\$54.6m	Live Plants.....\$17.0m
Fresh Vegetables\$100.9m	Processed Fruit\$999.3m
Garlic.....\$27.5m	Olives and Olive Oil\$245.6m
Asparagus.....\$22.3m	Dried Tree Fruits.....\$45.0m
Mushrooms.....\$11.1m	Orange Juice\$45.6m
Nuts\$427.5m	Processed Vegetables\$622.3m
Cashews.....\$178.8m	Potatoes.....\$205.7m
Walnuts\$49.2m	Tomatoes.....\$126.2m
Hazelnuts.....\$29.4m	Beans.....\$57.8m



Total Exports

For the year ending June 2018, Australia exported **\$2.38 billion** worth of horticultural products. Fresh Fruit was the largest value export grouping. The value of exports by group is profiled in the chart and table below. The table below also includes the top 3 export categories within each group. *These values do not include wine grapes.*



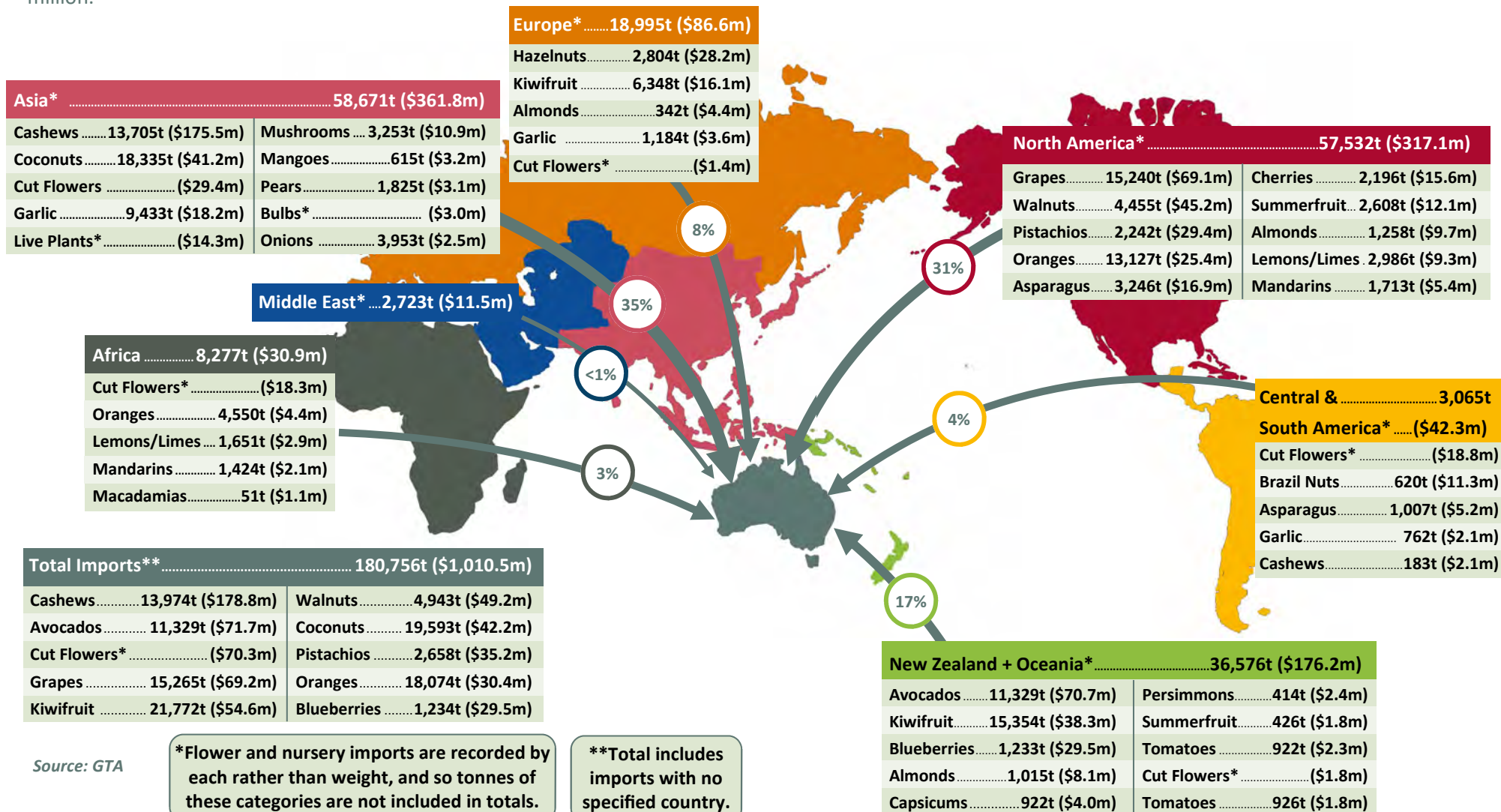
Sources: GTA; (Freshlogic Analysis)

Fresh Fruit\$1085.2m	Other Fresh Horticulture\$16.0m
Table Grapes\$384.1m	Cut Flowers.....\$10.3m
Oranges.....\$280.1m	Live Plants.....\$5.6m
Mandarins.....\$139.1m	Bulbs.....\$0.2m
Fresh Vegetables\$255.2m	Processed Fruit\$159.2m
Carrots.....\$94.6m	Dried Grapes and Grape Juice.....\$43.2m
Potatoes.....\$28.0m	Olives and Olive Oil.....\$26.0m
Asparagus.....\$27.8m	Dried Mangoes.....\$28.7m
Nuts\$793.2m	Processed Vegetables\$72.7m
Almonds.....\$440.3m	Potatoes.....\$15.2m
Macadamias.....\$266.0m	Tomatoes.....\$12.1m
Walnuts.....\$22.7m	Ginger.....\$5.8m



Imports of fresh horticultural products by region

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



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



Exports of fresh horticultural products by region

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

Asia * 535,135t (\$1,554.7)	
Grapes..... 102,602t (\$359.7m)	Cherries 3,669t (\$57.6m)
Oranges..... 160,066t (\$240.0m)	Summerfruit 12,554t (\$48.5m)
Almonds..... 35,791t (\$226.4m)	Carrots..... 37,609t (\$33.3m)
Macadamias.. 23,757t (\$217.3m)	Asparagus..... 3,693t (\$27.7m)
Mandarins..... 49,205t (\$111.7m)	Potatoes..... 34,476t (\$25.3m)

Middle East 117,097 (\$189.5m)	
Carrots..... 67,530t (\$58.5m)	Strawberries..... 1,297t (\$9.3m)
Almonds..... 3,839t (\$33.9m)	Mandarins 5,056t (\$9.0m)
Oranges..... 13,593t (\$14.8m)	Muskmelons..... 3,245t (\$6.9m)
Summerfruit... 4,682t (\$14.3m)	Mangoes..... 1,802t (\$6.6m)
Grapes..... 3,396t (\$10.5m)	Watermelons... 3,813t (\$4.8m)

Africa 2,380t (\$6.1m)
Almonds..... 384t (\$3.0m)

Total Exports** 746,344t (\$2,149.6m)	
Almonds..... 66,311t (\$461.2m)	Carrots 108,175t (\$94.6m)
Grapes..... 110,280t (\$384.1m)	Summerfruit... 17,769t (\$65.1m)
Oranges..... 190,043t (\$280.1m)	Cherries..... 4,114t (\$62.2m)
Macadamias... 25,675t (\$266.0m)	Strawberries..... 4,304t (\$29.7m)
Mandarins..... 63,960t (\$139.1m)	Mangoes..... 7,694t (\$28.7m)

Source: GTA

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

**Total includes exports with no specified country.



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

Europe 34,680t (\$200.1m)	
Almonds..... 19,008t (\$144.4m)	Cut Flowers* (\$3.1m)
Walnuts..... 4,293t (\$18.0m)	Mushrooms 4t (\$2.3m)
Macadamias..... 694t (\$17.3m)	Kiwifruit..... 587t (\$1.8m)
Onions..... 7,836t (\$6.0m)	Pecans..... 55t (\$1.0m)
Apples..... 1,488t (\$3.6m)	

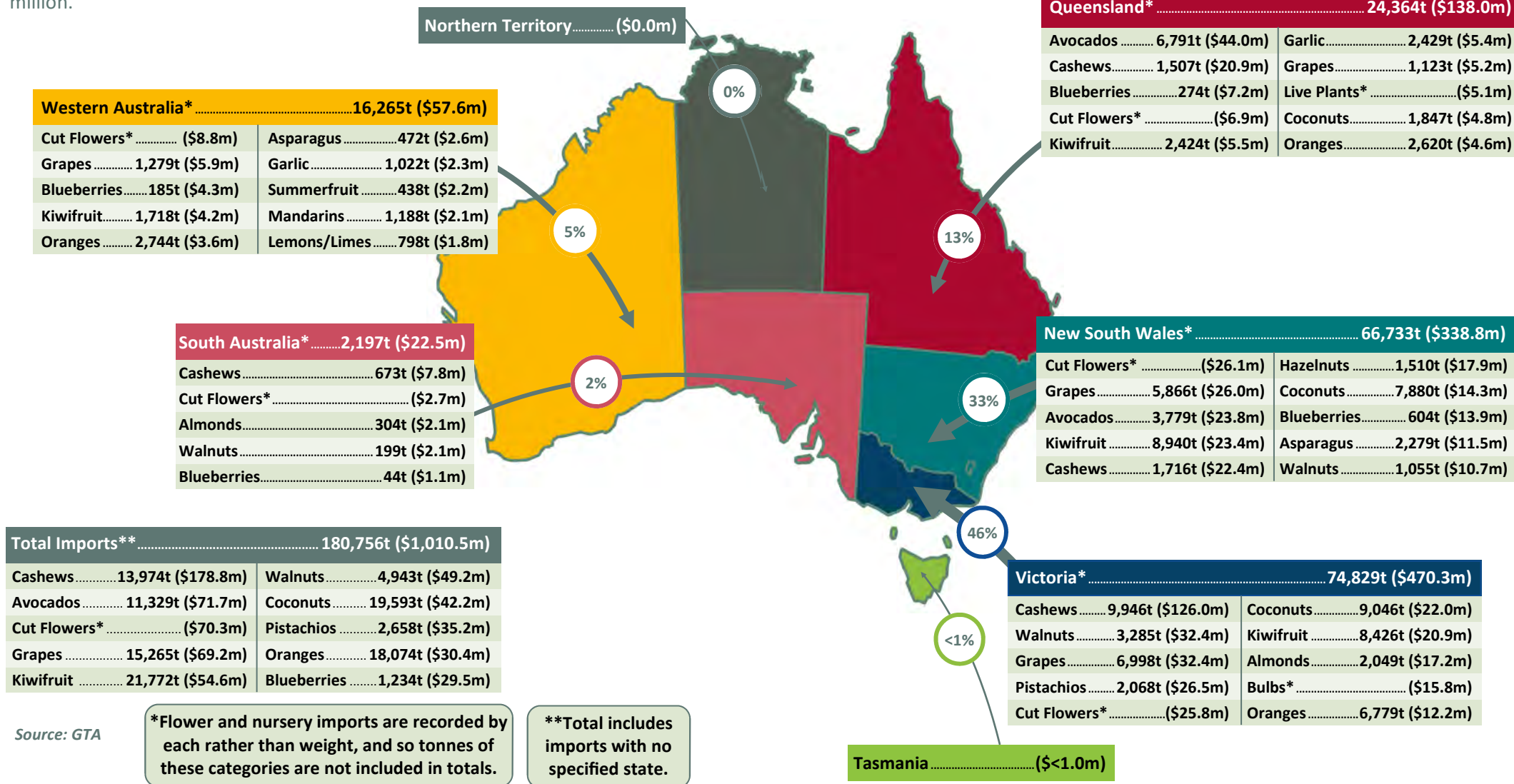
North America* 21,409t (\$86.8m)	
Macadamias.. 987t (\$25.0m)	Mushrooms 2t (\$1.9m)
Oranges..... 9,391t (\$15.7m)	Cherries 101t (\$1.8m)
Almonds..... 2,673t (\$11.4m)	Cut Flowers* (\$1.5m)
Mandarins..... 4,759t (\$9.3m)	Mangoes..... 205t (\$1.2m)
Pears..... 1,612t (\$2.9m)	Summerfruit..... 274t (\$1.1m)

New Zealand + Oceania 42,973t (\$114.1m)	
Almonds..... 2,030t (\$18.1m)	Beans..... 1,600t (\$6.7m)
Grapes..... 4,282t (\$13.8m)	Strawberries..... 7,83t (\$5.7m)
Oranges..... 6,646t (\$8.8m)	Muskmelons 3,577t (\$5.6m)
Mandarins 4,856t (\$8.7m)	Watermelons... 2,895t (\$3.5m)
Pears..... 4,608t (\$7.0m)	Mangoes..... 1,109t (\$3.5m)



Imports of fresh horticultural products by state

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

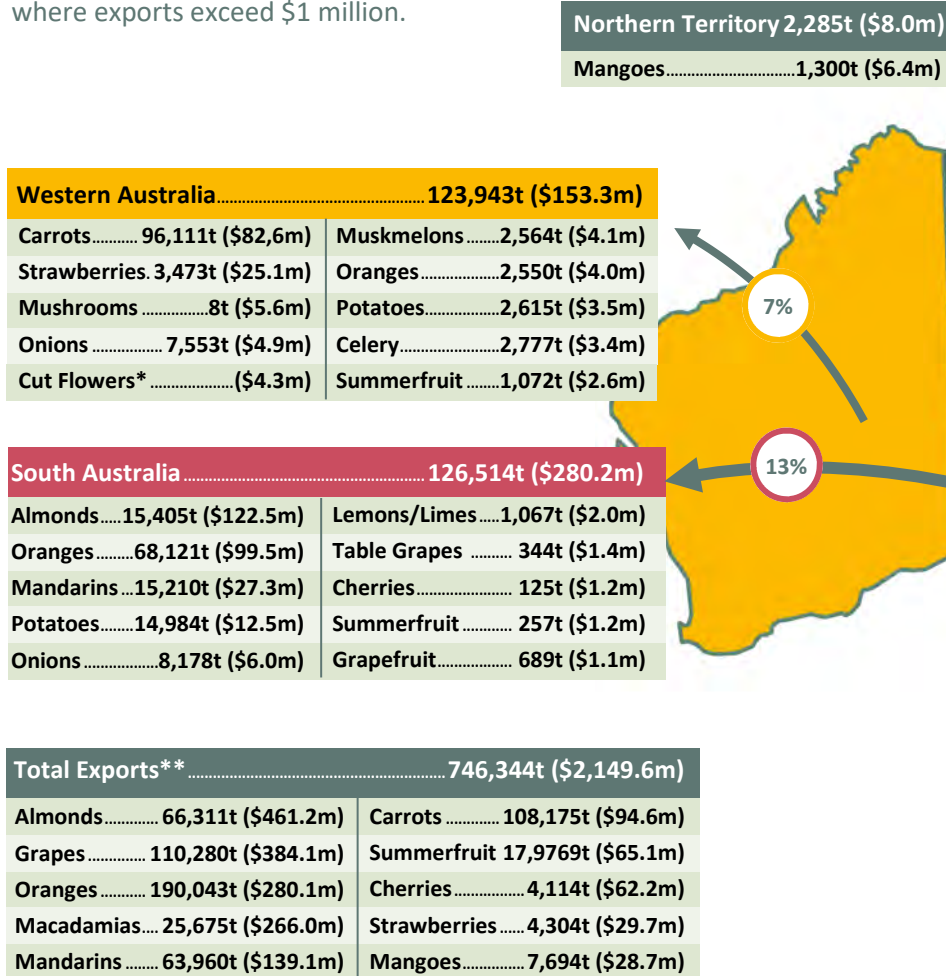


The relative share of the **value** of imports to each of the states is also profiled in the circle associated with each region. Note that the total value and volume for all states (located at the bottom left of the page) includes import information with no specified state, and therefore may exceed the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



Exports of fresh horticultural products by state

These pages profile total exports of **fresh** horticultural products by Australian state or territory of production. For each state, the total exports of fresh products is profiled, as well as up to the top 10 products **by value**, on products where exports exceed \$1 million.



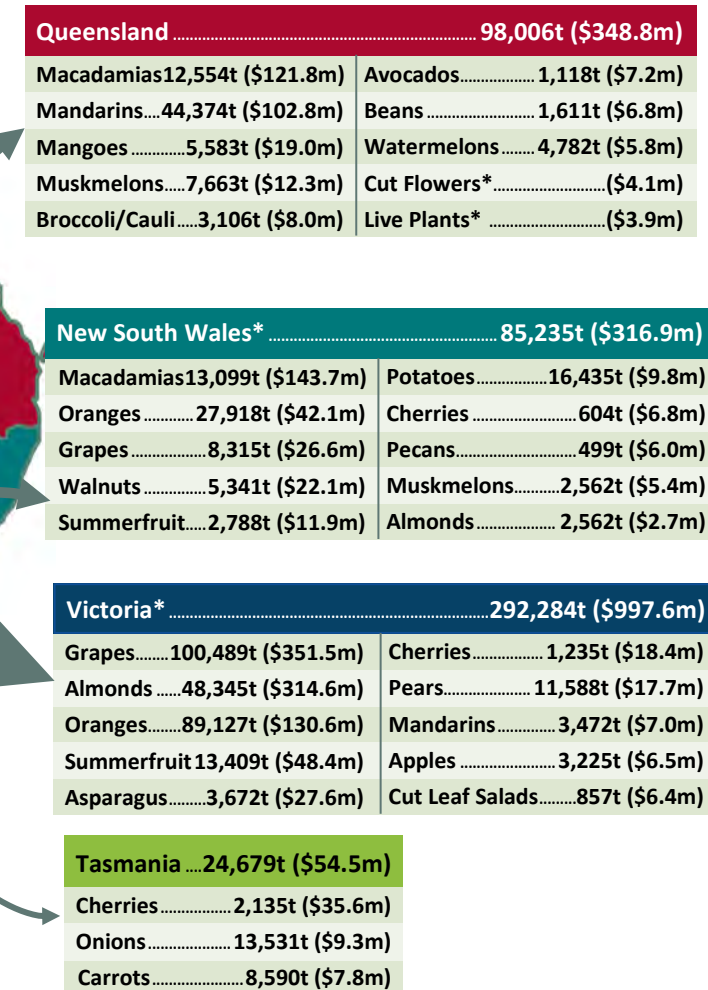
Source: GTA

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

**Total includes exports with no specified state.



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





Production Volume

The table below summarises the **Production** in **tonnes** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Production (t)	Year Ending June 2018	Production (t)
All Horticultural Products	6,541,768	Passionfruit	4,790
All Fruit	2,657,597	Papaya/Pawpaw	16,196
Apples	315,185	Persimmons	2,519
Avocados	77,032	Pears	115,929
Bananas	388,265	Pineapples	76,002
Berries - Combined	116,585	Summerfruit - Combined	153,148
Blueberries	16,850	Apricots	7,732
Rubus Berries	6,189	Nectarines/Peaches	115,651
Strawberries	93,545	Plums	29,764
Cherries	15,650	Table Grapes	177,416
Citrus - Combined	746,297	Processing Fruit Combined*	206,260
Grapefruit	12,660	Dried Grapes	76,289
Lemons/Limes	47,950	Prunes*	11,637
Mandarins	159,598	Other Dried Tree Fruit*	2,035
Oranges	526,089	Canned Fruit*	61,299
Custard Apples	1,693	Olives	55,000
Kiwifruit	9,582	Other Fruit	6,384
Lychees	2,633	All Vegetables	3,695,345
Mangoes	83,315	Artichokes	341
Melons - Combined	215,519	Asparagus	7,576
Muskmelons	45,480	Beans	33,890
Watermelons	170,039	Beetroot	14,167
Nashi	2,170	Broccoli/Baby Broccoli	76,104

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



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

Year Ending June 2018	Production (t)	Year Ending June 2018	Production (t)
Brussels Sprouts	6,210	Potatoes	1,388,968
Cabbage	75,165	Pumpkins	119,546
Capsicums	76,237	Sweet Corn	62,712
Carrots	330,655	Sweetpotatoes	97,222
Cauliflower	74,146	Tomatoes	484,073
Celery	65,240	Zucchini	40,063
Chillies	2,246	Other Vegetables	24,770
Cucumbers	91,084	All Nuts	188,825
Eggplant	9,043	Almonds (Inshell)**	113,516
Eng.Spinach/Silverbeet/Kale	7,028	Chestnuts (Inshell)	1,100
Fresh Herbs - Combined	11,394	Hazelnuts (Inshell)**	714
Fennel	1,020	Macadamias (Inshell)	49,300
Parsley and Other Herbs	10,374	Pecans (Inshell)	3,000
Garlic	2,246	Pistachios (Inshell)	3,200
Ginger	7,234	Walnuts (Inshell)	11,800
Leafy Asian Vegetables	28,541	Other Nuts (Inshell)	6,195
Leafy Salad Vegetables	56,297	Other Horticulture	N/A
Leeks	8,736	Cut Flowers	N/A
Head Lettuce	138,485	Nursery*	N/A
Mushrooms	70,463	Turf	N/A
Onions	249,147		
Parsnips	3,367		
Peas	32,947		

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



Production Value

The table below summarises the **Value of Production** in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Production (\$m)	Year Ending June 2018	Production (\$m)
All Horticultural Products	\$13,232.9	Passionfruit	\$16.8
All Fruit	\$5,015.4	Papaya/Pawpaw	\$31.4
Apples	\$465.3	Persimmons	\$11.6
Avocados	\$543.0	Pears	\$99.0
Bananas	\$484.2	Pineapples	\$53.4
Berries - Combined	\$911.4	Summerfruit - Combined	\$397.8
Blueberries	\$309.0	Apricots	\$29.8
Rubus Berries	\$157.3	Nectarines/Peaches	\$289.5
Strawberries	\$445.0	Plums	\$78.5
Cherries	\$148.7	Table Grapes	\$543.7
Citrus - Combined	\$797.8	Processing Fruit Combined*	\$135.2
Grapefruit	\$16.7	Dried Grapes	\$30.6
Lemons/Limes	\$102.3	Prunes*	\$5.8
Mandarins	\$305.8	Other Dried Tree Fruit*	\$0.7
Oranges	\$373.0	Canned Fruit*	\$26.4
Custard Apples	\$6.5	Olives	\$71.9
Kiwifruit	\$26.3	Other Fruit	\$17.1
Lychees	\$24.0	All Vegetables	\$4,345.7
Mangoes	\$204.3	Artichokes	\$0.8
Melons - Combined	\$124.2	Asparagus	\$61.0
Muskmelons	\$49.5	Beans	\$76.4
Watermelons	\$74.7	Beetroot	\$11.7
Nashi	\$6.5	Broccoli/Baby Broccoli	\$229.8

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



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

Year Ending June 2018	Production (\$m)	Year Ending June 2018	Production (\$m)
Brussels Sprouts	\$18.3	Potatoes	\$745.9
Cabbage	\$41.6	Pumpkins	\$68.8
Capsicums	\$155.6	Sweet Corn	\$60.2
Carrots	\$215.7	Sweetpotatoes	\$73.8
Cauliflower	\$47.4	Tomatoes	\$609.9
Celery	\$60.2	Zucchini	\$72.0
Chillies	\$9.1	Other Vegetables	\$81.6
Cucumbers	\$157.3	All Nuts	\$986.8
Eggplant	\$17.5	Almonds	\$550.1
Eng.Spinach/Silverbeet/Kale	\$19.3	Chestnuts	\$7.9
Fresh Herbs - Combined	\$179.0	Hazelnuts	\$2.0
Fennel	\$2.0	Macadamias	\$297.3
Parsley and Other Herbs	\$176.9	Pecans	\$20.0
Garlic	\$15.6	Pistachios	\$35.4
Ginger	\$48.7	Walnuts	\$38.6
Leafy Asian Vegetables	\$64.5	Other Nuts	\$35.5
Leafy Salad Vegetables	\$348.7	Other Horticulture	\$2,884.9
Leeks	\$21.0	Cut Flowers	\$280.6
Head Lettuce	\$147.1	<i>Nursery*</i>	<i>\$2,331.2</i>
Mushrooms	\$456.6	Turf	\$273.1
Onions	\$164.8		
Parsnips	\$11.2		
Peas	\$54.5		

**Note: The nursery production value has been reported for indication only. This value has been provided outside of THRUchain methodology and is based directly on project output from NY16004. See pages 468 to 473.*



Volume of Fresh Exports

The table below summarises the **Volume of Fresh Exports** in **tonnes** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Fresh Export Volume (t)	Year Ending June 2018	Fresh Export Volume (t)
All Horticultural Products	746,344	Passionfruit	
All Fruit	444,246	Papaya/Pawpaw	16
Apples	5,060	Persimmons	183
Avocados	1,786	Pears	12,467
Bananas		Pineapples	
Berries - Combined	4,529	Summerfruit - Combined	17,769
Blueberries	221	Apricots	404
Rubus Berries	3	Nectarines/Peaches	12,068
Strawberries	4,304	Plums	5,297
Cherries	4,114	Table Grapes	110,280
Citrus - Combined	258,196	Processing Fruit Combined*	
Grapefruit	1,198	Dried Grapes*	
Lemons/Limes	2,883	Prunes*	
Mandarins	63,960	Other Dried Tree Fruit*	
Oranges	190,043	Canned Fruit*	
Custard Apples	85	Olives*	
Kiwifruit	1,027	Other Fruit	305
Lychees	466	All Vegetables	205,665
Mangoes	7,694	Artichokes	5
Melons - Combined	20,271	Asparagus	3,711
Muskmelons	13,543	Beans	1,639
Watermelons	6,728	Beetroot	230
Nashi		Broccoli/Baby Broccoli	5,861

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2018	Fresh Export Volume (t)	Year Ending June 2018	Fresh Export Volume (t)
Brussels Sprouts	266	Potatoes	36,529
Cabbage	1,707	Pumpkins	2,074
Capsicums	317	Sweet Corn	
Carrots	108,175	Sweetpotatoes	922
Cauliflower	799	Tomatoes	804
Celery	4,504	Zucchini	
Chillies	3	Other Vegetables	5,077
Cucumbers	134	All Nuts*	96,434
Eggplant	10	Almonds*	64,196
Eng.Spinach/Silverbeet/Kale	243	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	90
Fennel		Macadamias*	21,221
Parsley and Other Herbs		Pecans*	600
Garlic	118	Pistachios*	102
Ginger	9	Walnuts*	5,399
Leafy Asian Vegetables		Other Nuts*	4,824
Leafy Salad Vegetables	1,358	Other Horticulture	N/A
Leeks	124	Cut Flowers	N/A
Head Lettuce	432	<i>Nursery*</i>	<i>N/A</i>
Mushrooms	89	Turf	N/A
Onions	30,516		
Parsnips			
Peas	7		

**Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 420 to 453.*



Value of Fresh Exports

The table below summarises the **Value of Fresh Exports** in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Fresh Export Value (\$m)	Year Ending June 2018	Fresh Export Value (\$m)
All Horticultural Products	\$2,149.6	Passionfruit	
All Fruit	\$1,085.2	Papaya/Pawpaw	<\$0.1
Apples	\$11.3	Persimmons	\$1.1
Avocados	\$11.6	Pears	\$19.6
Bananas		Pineapples	
Berries - Combined	\$34.2	Summerfruit - Combined	\$65.1
Blueberries	\$4.4	Apricots	\$1.9
Rubus Berries	<\$0.1	Nectarines/Peaches	\$43.2
Strawberries	\$29.7	Plums	\$20.0
Cherries	\$62.2	Table Grapes	\$384.1
Citrus - Combined	\$427.8	Processing Fruit Combined*	
Grapefruit	\$2.1	Dried Grapes*	
Lemons/Limes	\$6.0	Prunes*	
Mandarins	\$139.1	Other Dried Tree Fruit*	
Oranges	\$280.1	Canned Fruit*	
Custard Apples	\$0.4	Olives*	
Kiwifruit	\$3.6	Other Fruit	<\$0.1
Lychees	\$5.2	All Vegetables	\$255.2
Mangoes	\$28.7	Artichokes	<\$0.1
Melons - Combined	\$31.6	Asparagus	\$27.8
Muskmelons	\$23.2	Beans	\$6.9
Watermelons	\$8.4	Beetroot	\$0.7
Nashi		Broccoli/Baby Broccoli	\$16.0

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2018	Fresh Export Value (\$m)	Year Ending June 2018	Fresh Export Value (\$m)
Brussels Sprouts	\$1.2	Potatoes	\$28.0
Cabbage	\$3.2	Pumpkins	\$3.0
Capsicums	\$1.2	Sweet Corn	
Carrots	\$94.6	Sweetpotatoes	\$1.6
Cauliflower	\$1.8	Tomatoes	\$3.0
Celery	\$7.1	Zucchini	
Chillies	<\$0.1	Other Vegetables	\$15.8
Cucumbers	\$0.4	All Nuts*	\$793.2
Eggplant	<\$0.1	Almonds*	\$440.3
Eng.Spinach/Silverbeet/Kale	\$2.0	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	\$0.8
Fennel		Macadamias*	\$266.0
Parsley and Other Herbs		Pecans*	\$7.8
Garlic	\$0.3	Pistachios*	\$1.4
Ginger	\$0.1	Walnuts*	\$22.7
Leafy Asian Vegetables		Other Nuts*	\$54.1
Leafy Salad Vegetables	\$9.4	Other Horticulture	\$16.0
Leeks	\$0.6	Cut Flowers	\$10.4
Head Lettuce	\$1.7	Nursery*	\$5.6
Mushrooms	\$6.8	Turf	
Onions	\$21.7		
Parsnips			
Peas	<\$0.1		

*Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 420 to 453.



Volume of Fresh Imports

The table below summarises the **Volume of Fresh Imports** in **tonnes** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Fresh Import Volume (t)	Year Ending June 2018	Fresh Import Volume (t)
All Horticultural Products	180,756	Passionfruit	
All Fruit	109,146	Papaya/Pawpaw	131
Apples	1,145	Persimmons	445
Avocados	11,330	Pears	1,826
Bananas		Pineapples	
Berries - Combined	1,235	Summerfruit - Combined	3,095
Blueberries	1,234	Apricots	434
Rubus Berries		Nectarines/Peaches	2,281
Strawberries	1	Plums	380
Cherries	2,198	Table Grapes	15,265
Citrus - Combined	27,749	Processing Fruit Combined*	
Grapefruit	1,125	Dried Grapes*	
Lemons/Limes	4,739	Prunes*	
Mandarins	3,805	Other Dried Tree Fruit*	
Oranges	18,074	Canned Fruit*	
Custard Apples		Olives*	
Kiwifruit	21,772	Other Fruit	22,096
Lychees		All Vegetables	32,839
Mangoes	866	Artichokes	
Melons - Combined	1	Asparagus	4,272
Muskmelons	1	Beans	438
Watermelons		Beetroot	3
Nashi		Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2018	Fresh Import Volume (t)	Year Ending June 2018	Fresh Import Volume (t)
Brussels Sprouts		Potatoes	
Cabbage	8	Pumpkins	2
Capsicums	1,182	Sweet Corn	
Carrots		Sweetpotatoes	349
Cauliflower		Tomatoes	926
Celery		Zucchini	
Chillies	12	Other Vegetables	3,443
Cucumbers		All Nuts*	38,771
Eggplant		Almonds*	2,856
Eng.Spinach/Silverbeet/Kale	31	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	2,870
Fennel		Macadamias*	111
Parsley and Other Herbs		Pecans*	
Garlic	12,224	Pistachios*	2,499
Ginger	224	Walnuts*	4,943
Leafy Asian Vegetables		Other Nuts*	25,492
Leafy Salad Vegetables		Other Horticulture	N/A
Leeks	29	Cut Flowers	N/A
Head Lettuce		<i>Nursery*</i>	<i>N/A</i>
Mushrooms	3,288	Turf	N/A
Onions	5,482		
Parsnips			
Peas	925		

**Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 420 to 453.*



Value of Fresh Imports

The table below summarises the **Value of Fresh Imports** in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Fresh Import Value (\$m)	Year Ending June 2018	Fresh Import Value (\$m)
All Horticultural Products	\$1,010.5	Passionfruit	
All Fruit	\$374.1	Papaya/Pawpaw	\$0.4
Apples	\$2.9	Persimmons	\$2.6
Avocados	\$71.7	Pears	\$3.1
Bananas		Pineapples	
Berries - Combined	\$29.5	Summerfruit - Combined	\$14.2
Blueberries	\$29.5	Apricots	\$1.9
Rubus Berries		Nectarines/Peaches	\$10.7
Strawberries	<\$0.1	Plums	\$1.6
Cherries	\$15.6	Table Grapes	\$69.2
Citrus - Combined	\$54.1	Processing Fruit Combined*	
Grapefruit	\$2.3	Dried Grapes*	
Lemons/Limes	\$12.4	Prunes*	
Mandarins	\$9.0	Other Dried Tree Fruit*	
Oranges	\$30.4	Canned Fruit*	
Custard Apples		Olives*	
Kiwifruit	\$54.6	Other Fruit	\$52.2
Lychees		All Vegetables	\$100.9
Mangoes	\$4.1	Artichokes	
Melons - Combined	<\$0.1	Asparagus	\$22.3
Muskmelons	<\$0.1	Beans	\$0.5
Watermelons		Beetroot	<\$0.1
Nashi		Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2018	Fresh Import Value (\$m)	Year Ending June 2018	Fresh Import Value (\$m)
Brussels Sprouts		Potatoes	
Cabbage	<\$0.1	Pumpkins	<\$0.1
Capsicums	\$4.4	Sweet Corn	
Carrots		Sweetpotatoes	\$0.4
Cauliflower		Tomatoes	\$1.8
Celery		Zucchini	
Chillies	\$0.2	Other Vegetables	\$24.5
Cucumbers		All Nuts*	\$427.5
Eggplant	<\$0.1	Almonds*	\$22.8
Eng.Spinach/Silverbeet/Kale	<\$0.1	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	\$29.4
Fennel		Macadamias*	\$0.1
Parsley and Other Herbs		Pecans*	
Garlic	\$27.5	Pistachios*	\$33.5
Ginger	\$0.7	Walnuts*	\$49.2
Leafy Asian Vegetables		Other Nuts*	\$292.5
Leafy Salad Vegetables		Other Horticulture	\$108.0
Leeks	\$0.1	Cut Flowers	\$70.3
Head Lettuce		<i>Nursery*</i>	<i>\$37.7</i>
Mushrooms	\$11.1	Turf	
Onions	\$4.6		
Parsnips			
Peas	\$2.6		

**Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 420 to 453.*



Fresh Supply Volume

The table below summarises the **Volume of Fresh Supply** in **tonnes** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Fresh Supply (t)	Year Ending June 2018	Fresh Supply (t)
All Horticultural Products	4,014,358	Passionfruit	4,488
All Fruit	1,723,813	Papaya/Pawpaw	16,087
Apples	219,115	Persimmons	2,756
Avocados	81,722	Pears	59,428
Bananas	387,104	Pineapples	47,206
Berries - Combined	98,617	Summerfruit - Combined	106,684
Blueberries	16,401	Apricots	6,407
Rubus Berries	5,702	Nectarines/Peaches	84,085
Strawberries	76,514	Plums	16,192
Cherries	12,702	Table Grapes	82,401
Citrus - Combined	294,228	Processing Fruit Combined*	
Grapefruit	12,052	Dried Grapes*	
Lemons/Limes	45,611	Prunes*	
Mandarins	96,314	Other Dried Tree Fruit*	
Oranges	140,250	Canned Fruit*	
Custard Apples	1,608	Olives*	
Kiwifruit	30,327	<i>Other Fruit</i>	10,519
Lychees	2,167	All Vegetables	2,213,712
Mangoes	71,809	Artichokes	335
Melons - Combined	192,673	Asparagus	8,138
Muskmelons	31,046	Beans	32,688
Watermelons	161,627	Beetroot	5,414
Nashi	2,170	Broccoli/Baby Broccoli	66,471

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



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

Year Ending June 2018	Fresh Supply (t)	Year Ending June 2018	Fresh Supply (t)
Brussels Sprouts	4,845	Potatoes	441,439
Cabbage	62,001	Pumpkins	113,767
Capsicums	72,617	Sweet Corn	28,241
Carrots	202,153	Sweetpotatoes	92,911
Cauliflower	67,224	Tomatoes	256,559
Celery	59,772	Zucchini	39,355
Chillies	1,737	<i>Other Vegetables</i>	22,506
Cucumbers	86,202	All Nuts	76,832
Eggplant	8,454	Almonds	28,403
Eng.Spinach/Silverbeet/Kale	6,302	Chestnuts	1,100
Fresh Herbs - Combined	10,966	Hazelnuts	3,326
Fennel	990	Macadamias	3,742
Parsley and Other Herbs	9,975	Pecans	1,215
Garlic	9,860	Pistachios	5,297
Ginger	3,857	Walnuts	8,135
Leafy Asian Vegetables	28,541	<i>Other Nuts</i>	25,615
Leafy Salad Vegetables	45,361	Other Horticulture	N/A
Leeks	8,641	Cut Flowers	N/A
Head Lettuce	138,052	<i>Nursery*</i>	<i>N/A</i>
Mushrooms	71,877	Turf	N/A
Onions	206,731		
Parsnips	3,269		
Peas	7,426		

**Note: Nut supply volume includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 420 to 453.*



Fresh Supply Wholesale Value

The table below summarises the **Wholesale Value** of the Fresh Supply in **million dollars** of all products profiled in this statistics handbook, where appropriate, for the year ending June 2018.

Year Ending June 2018	Wholesale Value (\$m)	Year Ending June 2018	Wholesale Value (\$m)
All Horticultural Products	\$13,411.1	Passionfruit	\$19.7
All Fruit	\$4,919.5	Papaya/Pawpaw	\$37.2
Apples	\$519.5	Persimmons	\$15.0
Avocados	\$650.9	Pears	\$93.5
Bananas	\$586.8	Pineapples	\$48.3
Berries - Combined	\$1,065.3	Summerfruit - Combined	\$391.7
Blueberries	\$394.4	Apricots	\$34.8
Rubus Berries	\$184.1	Nectarines/Peaches	\$291.0
Strawberries	\$486.8	Plums	\$66.0
Cherries	\$135.1	Table Grapes	\$313.7
Citrus - Combined	\$533.0	Processing Fruit Combined*	
Grapefruit	\$19.3	Dried Grapes*	
Lemons/Limes	\$127.0	Prunes*	
Mandarins	\$229.0	Other Dried Tree Fruit*	
Oranges	\$157.8	Canned Fruit*	
Custard Apples	\$7.2	Olives*	
Kiwifruit	\$96.8	Other Fruit	\$50.9
Lychees	\$23.0	All Vegetables	\$4,620.6
Mangoes	\$209.8	Artichokes	\$0.9
Melons - Combined	\$114.4	Asparagus	\$92.4
Muskmelons	\$35.0	Beans	\$84.2
Watermelons	\$79.4	Beetroot	\$11.5
Nashi	\$7.6	Broccoli/Baby Broccoli	\$253.4

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



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

Year Ending June 2018	Wholesale Value (\$m)	Year Ending June 2018	Wholesale Value (\$m)
Brussels Sprouts	\$19.9	Potatoes	\$518.8
Cabbage	\$45.0	Pumpkins	\$77.7
Capsicums	\$183.9	Sweet Corn	\$64.0
Carrots	\$157.8	Sweetpotatoes	\$85.2
Cauliflower	\$53.5	Tomatoes	\$687.7
Celery	\$63.6	Zucchini	\$84.6
Chillies	\$10.4	Other Vegetables	\$87.9
Cucumbers	\$184.0	All Nuts	\$774.2
Eggplant	\$20.5	Almonds	\$251.1
Eng.Spinach/Silverbeet/Kale	\$20.8	Chestnuts	\$9.4
Fresh Herbs - Combined	\$209.8	Hazelnuts	\$32.6
Fennel	\$2.4	Macadamias	\$89.6
Parsley and Other Herbs	\$207.4	Pecans	\$20.1
Garlic	\$87.8	Pistachios	\$70.0
Ginger	\$53.3	Walnuts	\$84.6
Leafy Asian Vegetables	\$75.9	Other Nuts	\$216.9
Leafy Salad Vegetables	\$393.5	Other Horticulture	\$3,096.8
Leeks	\$24.2	Cut Flowers	\$376.0
Head Lettuce	\$171.4	<i>Nursery*</i>	<i>\$2,447.8</i>
Mushrooms	\$554.5	Turf	\$273.1
Onions	\$175.5		
Parsnips	\$13.1		
Peas	\$53.8		

**Note: The nursery wholesale value has been reported for indication only. This value has been provided outside of THRUchain methodology and is based directly on project output from NY16004. See pages 468 to 473.*



All Fresh Horticulture Overview

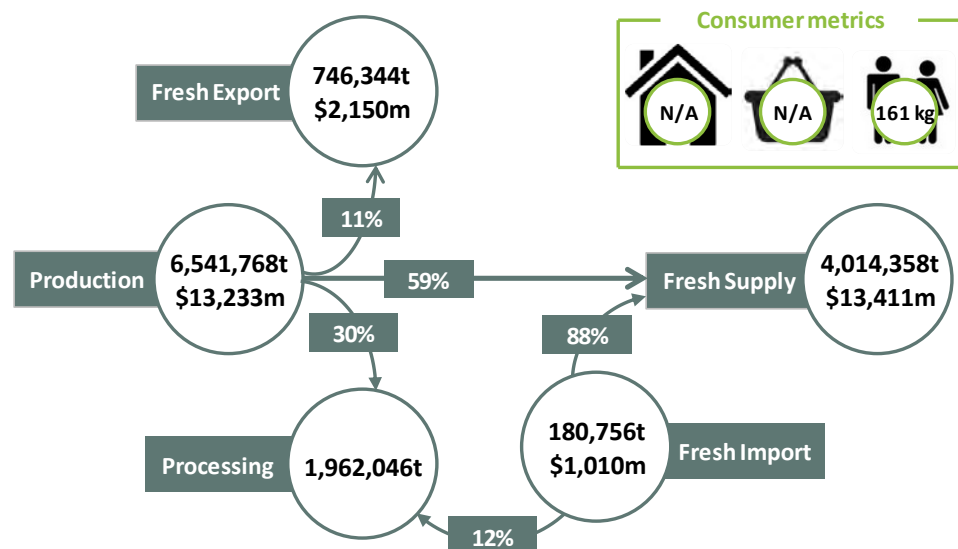
Pages 48-51 profile total horticultural production and trade. It combines information on fruit, vegetables, nuts and other horticultural categories (cut flowers, nursery and turf).

For the year ending June 2018:

- **6.54 million tonnes** of horticultural products (not including cut flowers, nursery and turf products) was produced in Australia.
- The value of production for all categories was **\$13.2 billion** while the wholesale value of the fresh supply was **\$13.4 billion**.
- The supply per capita was **161 kg**, based on the volume supplied.



All Fresh Horticulture Supply Chain—Year Ending June 2018



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



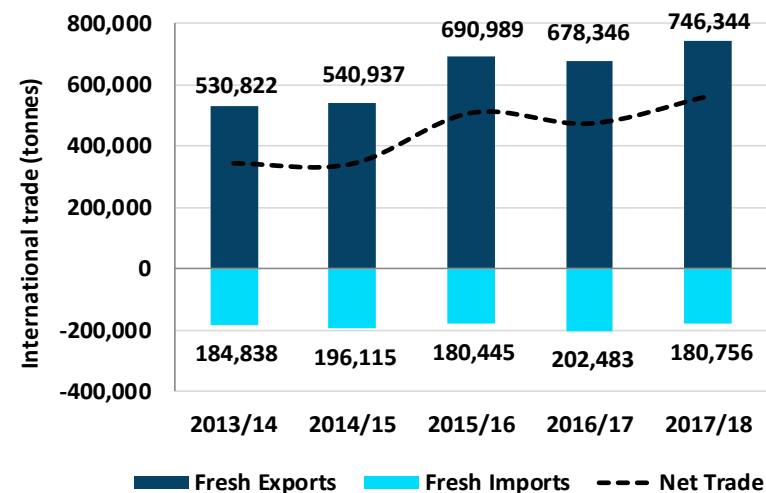
Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,393,024	6,359,401	>-1%	6,541,768	+3%
Production (\$m)	\$12,337.4	\$12,989.5	+5%	\$13,232.9	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	690,989	678,346	-2%	746,344	+10%
Fresh Export Value (\$m)	\$ 2,116.4	\$ 2,031.9	-4%	\$ 2,149.6	+6%
Fresh Import Volume (t)	180,445	202,483	+12%	180,756	-11%
Fresh Import Value (\$m)	\$ 1,013.3	\$ 1,086.9	+7%	\$ 1,010.5	-7%
Fresh Supply (t)	3,895,448	3,950,710	+1%	4,014,358	+2%
Fresh Supply Wholesale Value (\$m)	\$12,337.5	\$13,353.6	+8%	\$13,411.1	<1%
Supply per Capita (kg)	161.57	161.18	>-1%	161.01	>-1%

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

*Note: Figures has been modified from those published in the previous edition of the handbook (2016/17 edition).

All Fresh Horticulture International Trade

Australia is a net exporter of fresh horticultural products. For the year ending June 2018, Australia exported **746,344 tonnes** of fresh horticultural products (not including nursery, turf and flower categories), as profiled in the graph below, where imports are counted as negative tonnes.



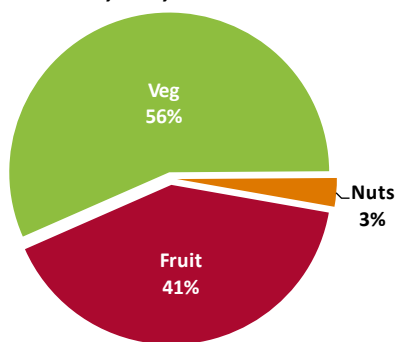
Source: GTA



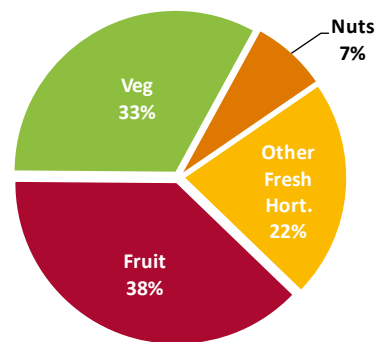
Production

The charts below profile the share of total Australian production of all horticultural categories during the year ending June 2018. For the below charts, only the **value** of the **Other Fresh Horticulture** grouping has been recorded, due to inconsistencies in the units used to measure volumes for this group.

**Production -
6,541,768 t**



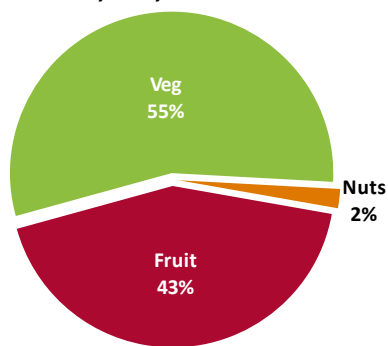
**Value of Production -
\$13,232.9 m**



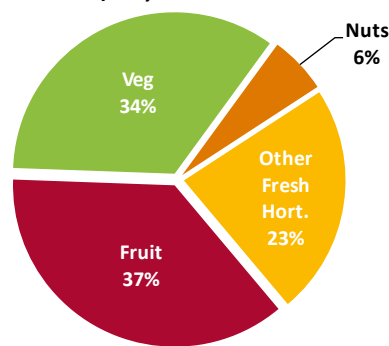
Fresh supply

The charts below profile the share of the total fresh supply of all horticultural categories during the year ending June 2018.

**Fresh Supply Volume -
4,014,358 t**



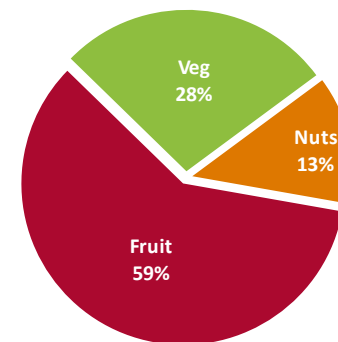
**Wholesale Value -
\$13,411.1 m**



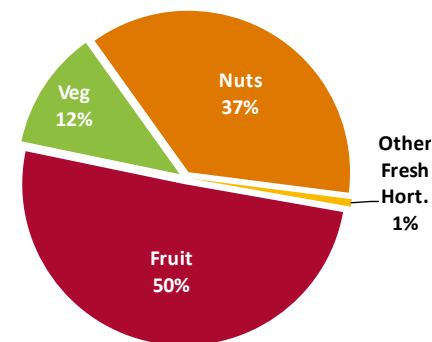
Fresh exports

The charts below profile the share of total Australian fresh exports of all horticultural categories during the year ending June 2018.

**Fresh Export Volume -
746,344 t**



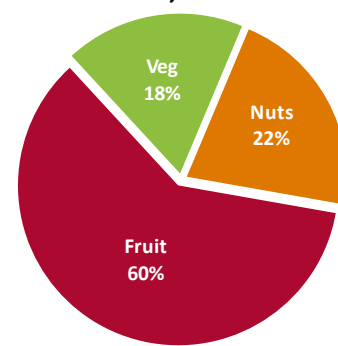
**Fresh Export Value -
\$2,149.6 m**



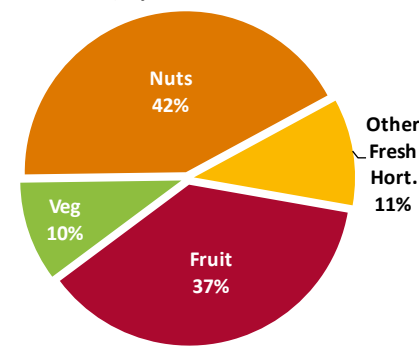
Fresh imports

The charts below profile the share of total Australian fresh imports of all horticultural categories during the year ending June 2018.

**Fresh Import Volume -
180,756 t**



**Fresh Import Value -
\$1,010.5 m**





All Fresh Fruit Overview

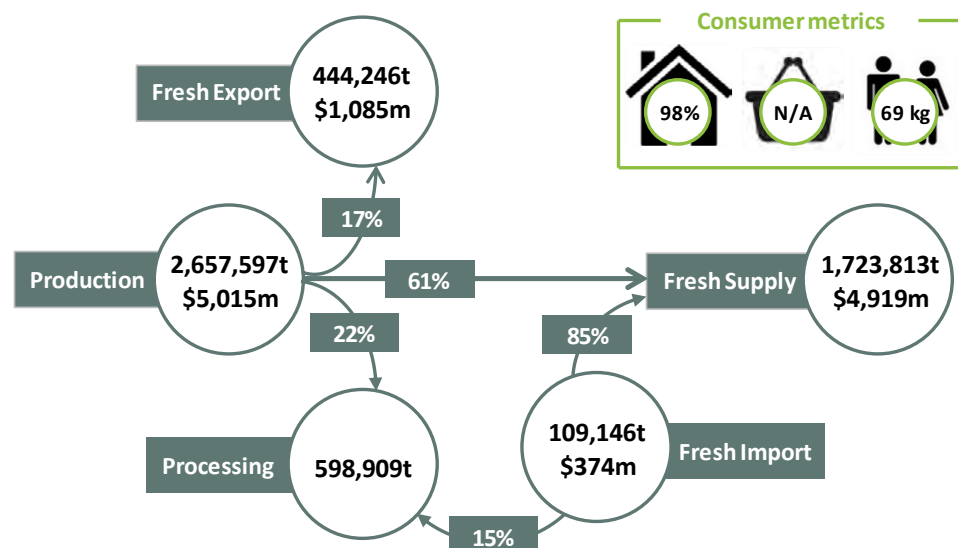
Pages 52-53 profile total fruit production and trade. It combines information on all fruit categories covered in this handbook.

For the year ending June 2018:

- **2.66 million tonnes** of fruit was produced in Australia.
- The value of production was **\$5.02 billion** while the wholesale value of the fresh supply was **\$4.92 billion**.
- **98%** of Australian households purchased fruit.
- The supply per capita was **69 kg**, based on the volume supplied.

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

All Fresh Fruit Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,624,277	2,670,402	+2%	2,657,597	>-1%
Production (\$m)	\$ 4,499.2	\$ 4,932.8	+10%	\$ 5,015.4	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	393,987	388,694	-1%	444,246	+14%
Fresh Export Value (\$m)	\$ 936.6	\$ 949.1	+1%	\$ 1,085.2	+14%
Fresh Import Volume (t)	109,802	126,908	+16%	109,146	-14%
Fresh Import Value (\$m)	\$ 362.9	\$ 423.4	+17%	\$ 374.1	-12%
Fresh Supply (t)	1,701,735	1,751,047	+3%	1,723,813	-2%
Fresh Supply Wholesale Value (\$m)	\$ 4,412.2	\$ 4,994.8	+13%	\$ 4,919.5	-2%
Supply per Capita (kg)	70.58	71.44	+1%	69.14	-3%

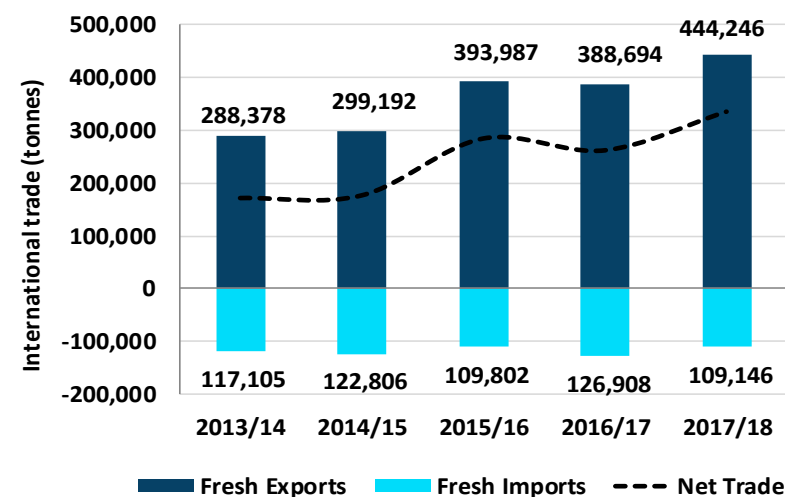
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

**Note: Figures has been modified from those published in the previous edition of the handbook (2016/17 edition).*

All Fresh Fruit International Trade

Australia is a net exporter of fresh fruit. For the year ending June 2018, Australia exported **444,246 tonnes** of fresh fruit, as profiled in the graph below, where imports are counted as negative tonnes.

Net All Fresh Fruit International Trade



Source: GTA



Fresh Apple Overview

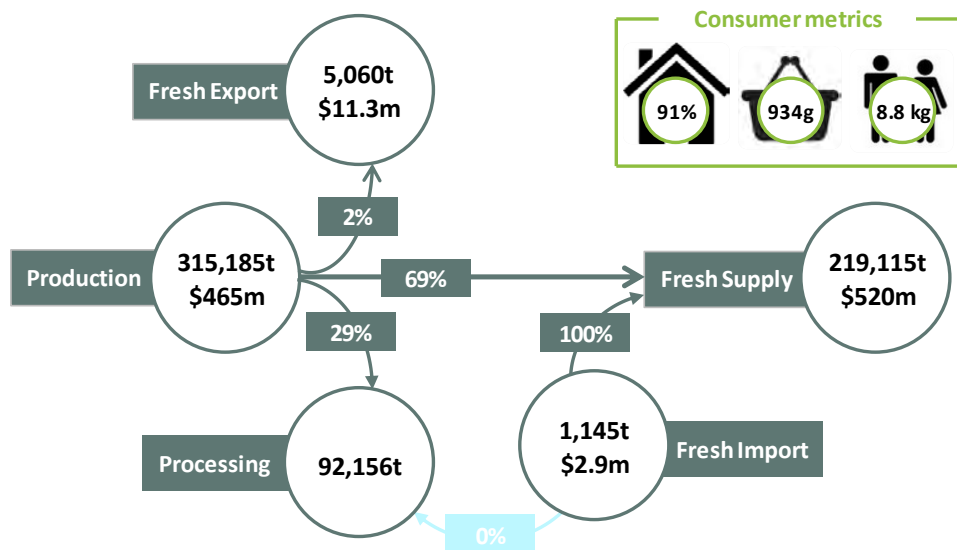
Apple production occurs across all states in Australia. Harvesting typically occurs between February and May. Year-round availability is made possible through the use of controlled atmosphere technology.

For the year ending June 2018:

- **315,185t** was produced with **29%** sent to be processed.
- The value of production was **\$465.3 m** while the wholesale value of the fresh supply was **\$519.5 m**.
- **91%** of Australian households purchased apples, buying an average of **934 g** per shopping trip.
- The supply per capita was **8.8 kg**, based on the volume supplied.



Fresh Apple Supply Chain — Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	316,758	319,686	<1%	315,185	-1%
Production (\$m)	\$ 441.5	\$ 497.2	+13%	\$ 465.3	-6%
Producing Trees (000 Trees)	11,367	11,645	+2%	-	-
Fresh Export Volume (t)	4,665	4,950	+6%	5,060	+2%
Fresh Export Value (\$m)	\$ 12.4	\$ 12.7	+3%	\$ 11.3	-12%
Fresh Import Volume (t)	619	1,053	+70%	1,145	+9%
Fresh Import Value (\$m)	\$ 1.6	\$ 2.4	+49%	\$ 2.9	+17%
Fresh Supply (t)	219,811	223,234	+2%	219,115	-2%
Fresh Supply Wholesale Value (\$m)	\$ 490.2	\$ 554.5	+13%	\$ 519.5	-6%
Supply per Capita (kg)	9.12	9.11	>-1%	8.79	-4%

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

Major Apple Production Areas

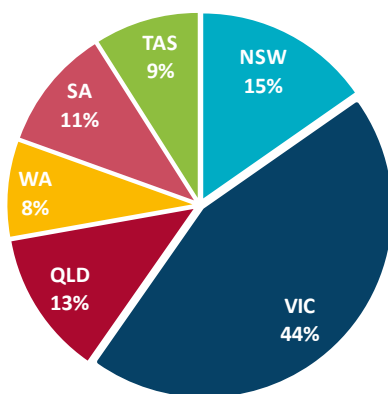
Apples are grown in all Australian states. The major producing areas include **Stanthorpe** in Queensland; **Batlow** and **Orange** in New South Wales; the **Goulburn Valley**, **Gippsland**, **Yarra Valley** and the **Mornington Peninsula** in Victoria; the **Huon Valley** and **North West** Tasmania; **Adelaide Hills** in South Australia; and **Donnybrook** and **Manjimup** in Western Australia.



Source: APAL



2017/18 Fresh Apple Production by State



Source: APAL

Fresh Apple Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	48,223												
Victoria	139,942												
Queensland	39,398												
Western Australia	26,160												
South Australia	33,094												
Tasmania	28,367												
Imports	1,145												
Availability legend			High		Medium		Low						

Source: APAL

Main Apple Varieties

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

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

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

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



Seasonality by Apple Variety

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

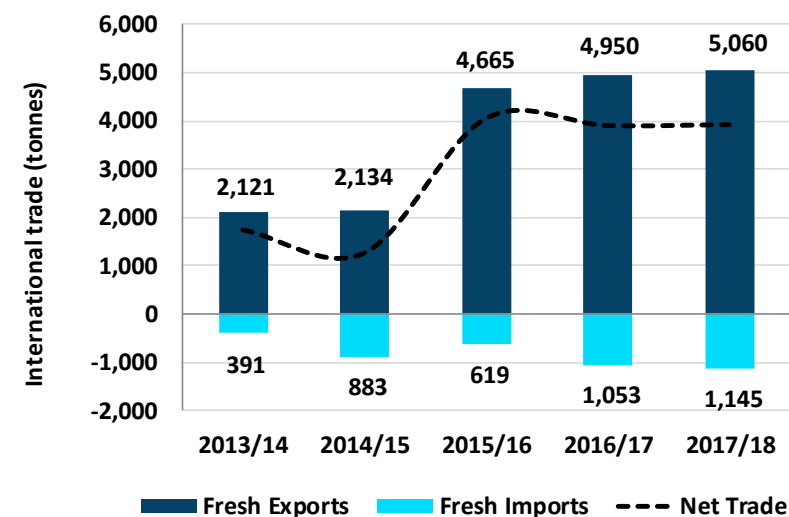
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	91,442												
Royal Gala	51,297												
Granny Smith	40,145												
Sundowner	2,230												
Other	37,915												
Processing	92,156												
Availability legend			High		Medium		Low						

Source: APAL

Fresh Apple International Trade

Australia has traditionally been a net exporter of fresh apples, typically exporting between 2,000-5,000 tonnes per year. For the year ending June 2018, Australia exported **5,060 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Apple International Trade

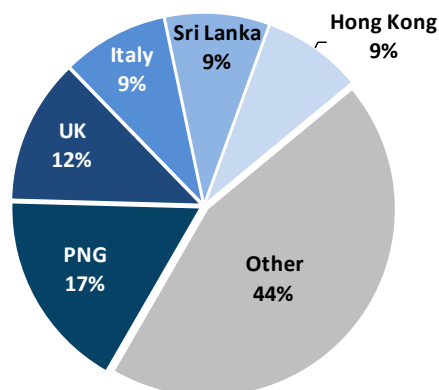


Source: GTA



For the year ending June 2018, **17%** of exported fresh apples were sent to the PNG, as profiled in the chart below.

2017/18 Fresh Apple Exports by Country



Source: GTA

Fresh Apple Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Victoria	401	585	813	Victoria	1,755	2,008	3,225
New South Wales	150	432	282	Queensland	1,271	1,351	995
Queensland	69	36	50	South Australia	823	977	379
Other	-	< 0.5	< 0.5	Tasmania	365	442	213
TOTAL	619	1,053	1,145	New South Wales	187	105	106
				Other	263	66	142
				TOTAL	4,665	4,950	5,060

Fresh Apple Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
China	357	698	594	PNG	1,067	949	865
New Zealand	262	355	550	UK	699	1,222	623
TOTAL	619	1,053	1,145	Italy	-	-	453
				Sri Lanka	45	293	447
				Hong Kong	297	343	428
				Other	2,557	2,143	2,243
				TOTAL	4,665	4,950	5,060

Source: GTA



Processed Apple International Trade

For the year ending June 2018, an additional **807 tonnes** of dried apples were imported, while **197 tonnes** were exported. Australia also imported **23.5 mega litres** of apple juice, while exporting **2.8 mega litres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 57.



Source: GTA





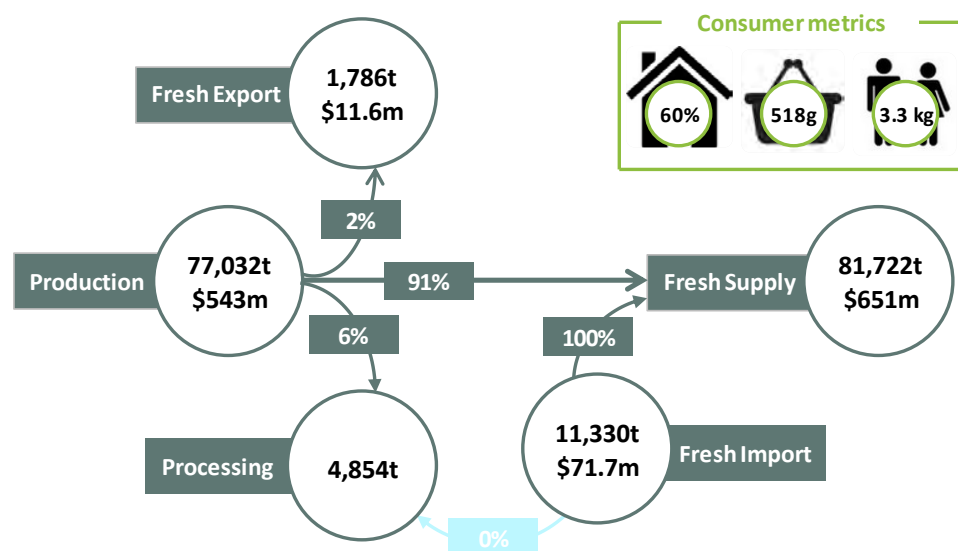
Fresh Avocado Overview

Avocado production occurs mainly in Queensland and Northern New South Wales during the winter, and Western Australia during the summer. The most common varieties of avocado in Australia are the Hass and Shepard. For the year ending June 2018:



- **77,032 t** was produced.
- The value of production was **\$543.0 m** while the wholesale value of the fresh supply was **\$650.9 m**.
- **60%** of Australian households purchased avocados, buying an average of **518g** per shopping trip.
- The supply per capita was **3.3 kg**, based on the volume supplied.

Fresh Avocado Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	66,716	65,992	-1%	77,032	+17%
Production (\$m)	\$ 412.3	\$ 374.5	-9%	\$ 543.0	+45%
Producing Trees (000 Trees)	1,322	1,778	+35%	-	-
Fresh Export Volume (t)	1,546	2,315	+50%	1,786	-23%
Fresh Export Value (\$m)	\$ 9.2	\$ 12.5	+37%	\$ 11.6	-7%
Fresh Import Volume (t)	13,108	23,355	+78%	11,330	-51%
Fresh Import Value (\$m)	\$ 63.6	\$ 116.9	+84%	\$ 71.7	-39%
Fresh Supply (t)	75,608	82,716	+9%	81,722	-1%
Fresh Supply Wholesale Value (\$m)	\$ 514.5	\$ 534.2	+4%	\$ 650.9	+22%
Supply per Capita (kg)	3.14	3.37	+8%	3.28	-3%

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

Major Avocado Production Areas

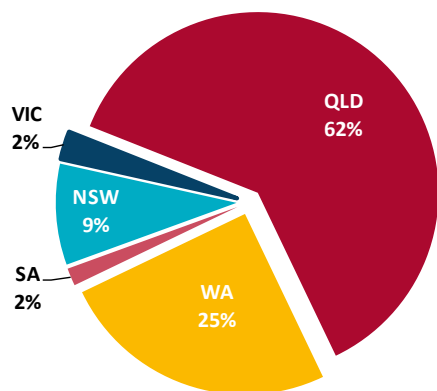
Avocado production occurs predominantly in Queensland during the winter months, particularly the **Atherton Tablelands** and **Bundaberg/Childers** regions, and Western Australia during the summer, particularly in **Pemberton/Manjimup**. Smaller volumes are produced in New South Wales and the Tri-State Area (NSW, VIC and SA) around **Sunraysia**.



Source: AAL



2017/18 Fresh Avocado Production by State



Source: AAL

Fresh Avocado Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	47,670												
Western Australia	19,236												
New South Wales	6,964												
Victoria	1,947												
South Australia	1,215												
Availability legend			High		Medium		Low						

Source: AAL; GTA

Main Avocado Varieties

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

Hass, an oval shaped avocado with dark-green, pebbly skin which darkens when ripe. Hass avocados accounted for **78%** of fresh production.

Shepard, a lighter green, pear shaped avocado which does not darken when it ripens. Shepard avocados accounted for **20%** of fresh production.

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



Seasonality by Avocado Variety

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

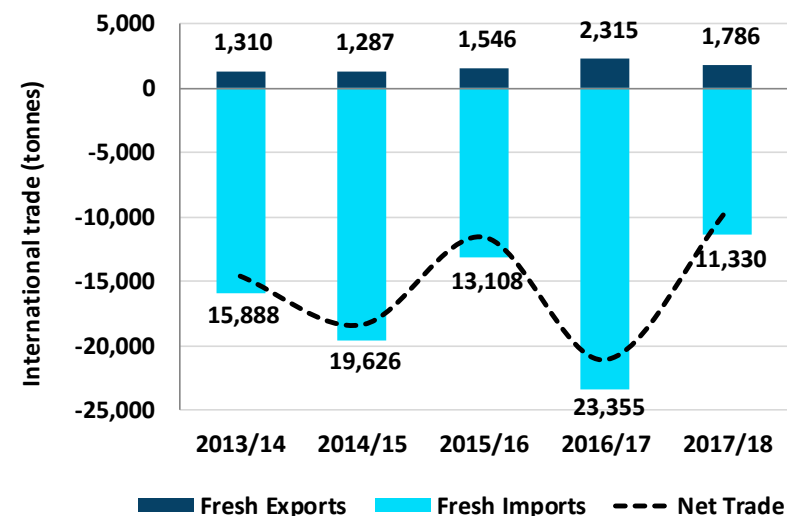
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	59,870												
Shepard	15,085												
Other	2,077												
Availability legend			High		Medium		Low						

Source: AAL

Fresh Avocado International Trade

Australia has traditionally been a net importer of fresh avocados, typically importing between 15,000-25,000 tonnes per year from New Zealand. For the year ending June 2018, Australia imported **11,330 tonnes**, and exported **1,786 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Avocado International Trade

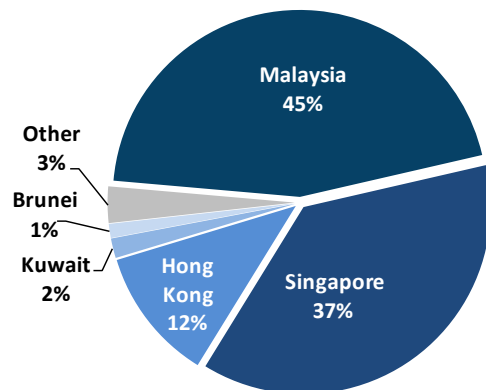


Source: GTA



For the year ending June 2018, Malaysia received **45%** of exported fresh avocados each, as profiled in the chart below.

2017/18 Fresh Avocado Exports by Country



Source: GTA

Fresh Avocado Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Queensland	5,372	10,169	6,791	Queensland	959	1,629	1,118
New South Wales	5,180	7,517	3,779	Western Australia	404	215	276
Victoria	2,497	5,578	759	Victoria	119	251	181
Western Australia	59	91	-	New South Wales	59	172	131
Other	-	< 0.5	-	South Australia	-	2	78
TOTAL	13,108	23,355	11,330	Other	6	46	2
				TOTAL	1,546	2,315	1,786

Fresh Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New Zealand	13,108	23,355	11,330	Malaysia	591	899	804
TOTAL	13,108	23,355	11,330	Singapore	792	905	668
				Hong Kong	87	217	206
				Kuwait	7	100	30
				Brunei	17	23	22
				Other	52	170	56
				TOTAL	1,546	2,315	1,786

Source: GTA





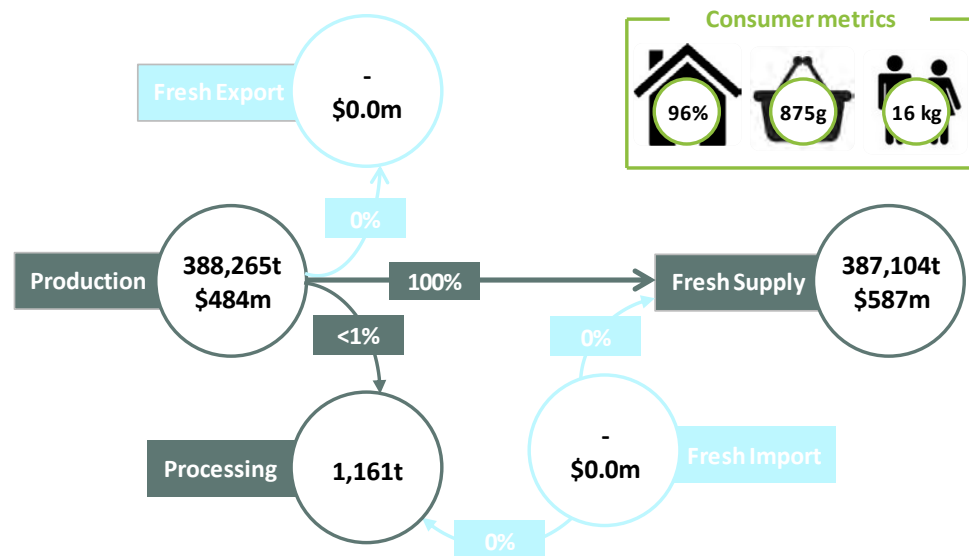
Fresh Banana Overview

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

For the year ending June 2018:

- **388,265 t** was produced.
- The value of production was **\$484.2 m** while the wholesale value of the fresh supply was **\$586.8 m**.
- **96%** of Australian households purchased bananas, buying an average of **875 g** per shopping trip.
- The supply per capita was **16 kg**, based on the volume supplied.

Fresh Banana Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	395,878	413,660	+4%	388,265	-6%
Production (\$m)	\$ 420.6	\$ 514.4	+22%	\$ 484.2	-6%
Production area (Ha)	15,610	14,021	-10%	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	394,694	412,423	+4%	387,104	-6%
Fresh Supply Wholesale Value (\$m)	\$ 509.7	\$ 623.4	+22%	\$ 586.8	-6%
Supply per Capita (kg)	16.37	16.83	+3%	15.53	-8%

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

Major Banana Production Areas

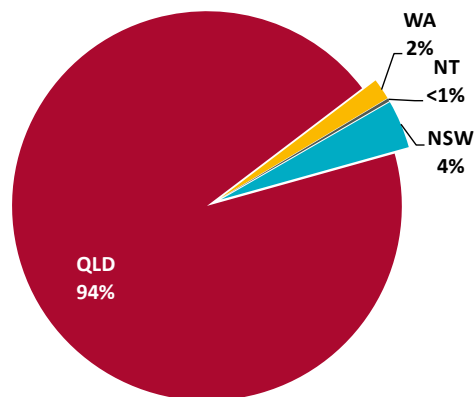
Bananas are produced in the northern states. The major producing areas include **Tully** and **Innisfail**, **Lakeland** and **Bundaberg** in Queensland; **Darwin** in the Northern Territory; the **Coffs Harbour** region in Northern New South Wales; and the **Carnarvon** region in Western Australia.



Source: ABGC



2017/18 Fresh Banana Production by State



Source: ABGC

Fresh Banana Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	364,969												
Western Australia	6,795												
Northern Territory	971												
New South Wales	15,531												
Availability legend			High		Medium		Low						

Source: ABGC

Main Banana Varieties

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

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

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

Seasonality by Banana Variety

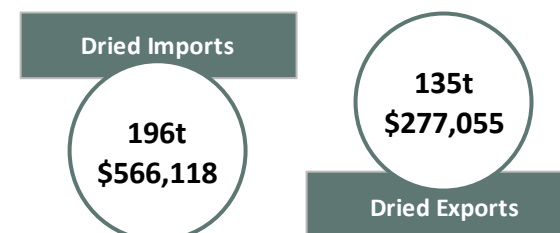
The seasonal availability of some major varieties is profiled in the table below.

Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	376,617												
Lady Fingers	11,648												
Availability legend			High		Medium		Low						

Source: ABGC

Processed Banana International Trade

Australia has a limited amount of international trade in fresh bananas, with the little trade that does occur being dominated by dried banana products. For the year ending June 2018, **196 tonnes** of dried bananas were imported, while **135 tonnes** was exported.



Source: GTA





Fresh Berries Overview

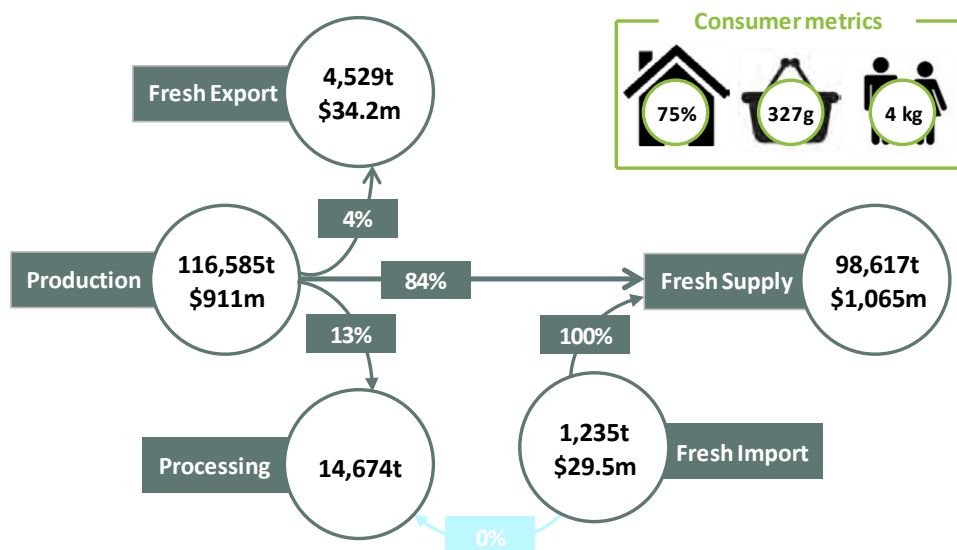
Pages 70-71 profile total berry production and trade. It combines information on blueberries, strawberries and rubus berries (such as raspberries and blackberries). The following pages profile each berry category in more detail.

For the year ending June 2018:

- **116,585 t** was produced.
- The value of production was **\$911.4 m** while the wholesale value of the fresh supply was **\$1,065.3 m**.
- **75%** of Australian households purchased fresh berries, buying an average of **327 g** per shopping trip.
- The supply per capita was **3.9 kg**, based on the volume supplied.



Fresh Berries Supply Chain—Year Ending June 2018



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



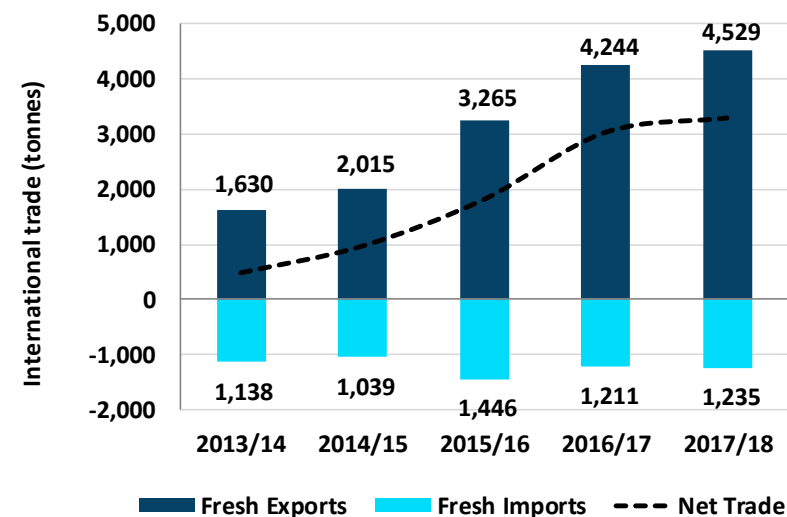
Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	84,709	108,915	+29%	116,585	+7%
Production (\$m)	\$ 658.9	\$ 918.1	+39%	\$ 911.4	>-1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,265	4,244	+30%	4,529	+7%
Fresh Export Value (\$m)	\$ 31.1	\$ 41.2	+32%	\$ 34.2	-17%
Fresh Import Volume (t)	1,446	1,211	-16%	1,235	+2%
Fresh Import Value (\$m)	\$ 29.9	\$ 27.1	-9%	\$ 29.5	+9%
Fresh Supply (t)	70,142	92,936	+32%	98,617	+6%
Fresh Supply Wholesale Value (\$m)	\$ 776.1	\$ 1,067.5	+38%	\$ 1,065.3	>-1%
Supply per Capita (kg)	2.91	3.79	+30%	3.96	+4%

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

Fresh Berries International Trade

Australia typically exports more fresh berries than it imports. For the year ending June 2018, Australia exported **4,529 tonnes** of fresh berries, as profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Berries International Trade



Source: GTA



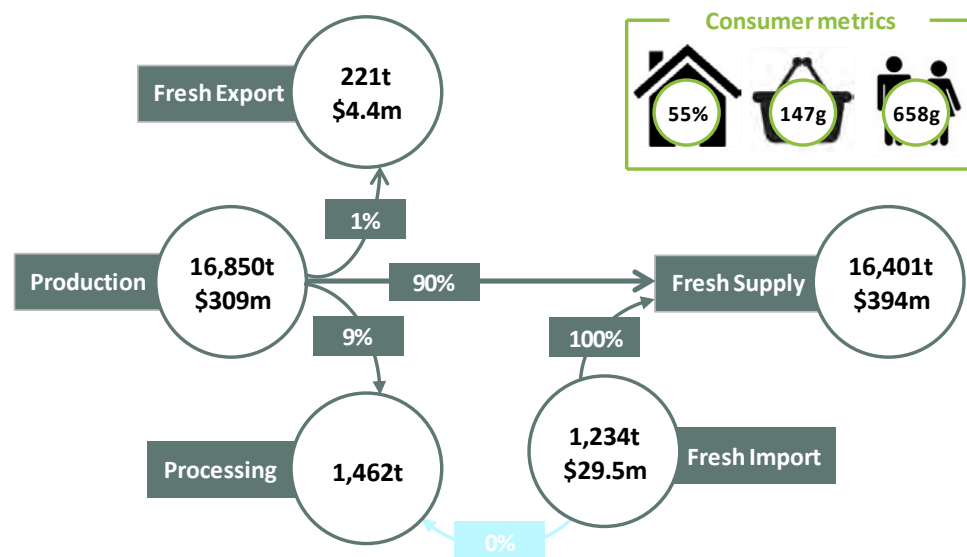
Fresh Blueberries Overview

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

For the year ending June 2018:

- **16,850 t** was produced.
- The value of production was **\$309.0 m** while the wholesale value of the fresh supply was **\$394.4 m**.
- **55%** of Australian households purchased fresh blueberries, buying an average of **147 g** per shopping trip.
- The supply per capita of was **658 g**, based on the volume supplied.

Fresh Blueberries Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,660	11,887	+55%	16,850	+42%
Production (\$m)	\$ 149.6	\$ 245.1	+64%	\$ 309.0	+26%
Production area (Ha)	1,250	1,375	+10%	1,375	-
Fresh Export Volume (t)	254	356	+40%	221	-38%
Fresh Export Value (\$m)	\$ 5.2	\$ 8.5	+62%	\$ 4.4	-48%
Fresh Import Volume (t)	1,432	1,211	-15%	1,234	+2%
Fresh Import Value (\$m)	\$ 29.8	\$ 27.1	-9%	\$ 29.5	+9%
Fresh Supply (t)	7,939	11,811	+49%	16,401	+39%
Fresh Supply Wholesale Value (\$m)	\$ 210.9	\$ 317.1	+50%	\$ 394.4	+24%
Supply per Capita (kg)	0.33	0.48	+46%	0.66	+37%

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

**Note: Production volume has been modified from the quoted volumes published in the previous edition of the handbook (2016/17 edition).*

Major Blueberry Production Areas

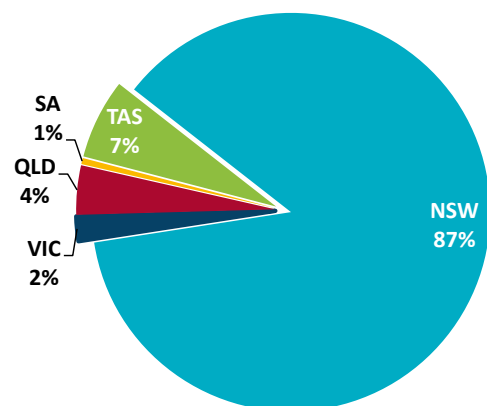
The majority of blueberries are produced in the northern New South Wales region of **Coffs Harbour**. Other production areas in Western Australia, South Australia, Queensland, Victoria and Tasmania allow the season to be extended to close to year round.



Source: BA



2017/18 Fresh Blueberries Production by State



Source: BA

Fresh Blueberries Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	14,659												
Queensland	674												
Tasmania	1,095												
Victoria	337												
South Australia	84												
Imports	1,234												
Availability legend		<div></div> High <div></div> Medium <div></div> Low <div></div> None											

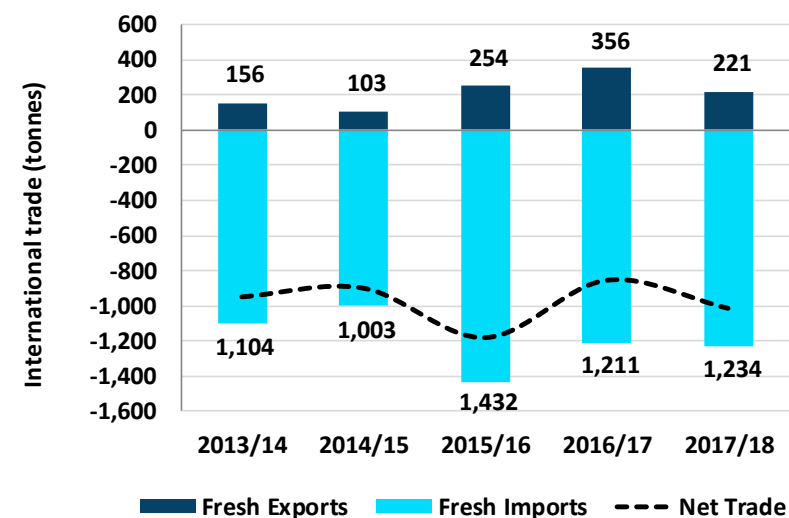
Source: BA

Fresh Blueberries International Trade

Australia has traditionally been a net importer of fresh blueberries, typically importing 1,000-1,400 tonnes per year, with the majority of this volume coming from New Zealand. For the year ending June 2018, Australia imported **1,234 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



Net Fresh Blueberries International Trade

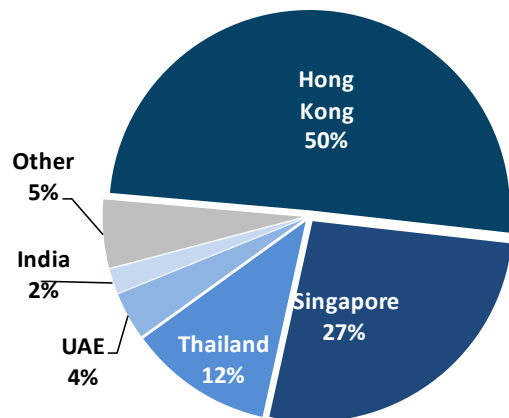


Source: GTA

For the year ending June 2018, **50%** of exported fresh blueberries were sent to Hong Kong, as profiled in the chart on the following page.



2017/18 Fresh Blueberries Exports by Country



Source: GTA

Fresh Blueberry Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	595	570	601	New South Wales	184	265	122
Queensland	381	254	274	Queensland	64	80	80
Western Australia	233	149	185	Victoria	6	6	19
Victoria	224	236	131	Tasmania	< 0.5	1	< 0.5
South Australia	-	3	44	Western Australia	< 0.5	3	-
TOTAL	1,432	1,211	1,234	Other	< 0.5	< 0.5	< 0.5
				TOTAL	254	356	221

Fresh Blueberry Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New Zealand	1,432	1,211	1,231	Hong Kong	115	169	112
Iran	-	-	1	Singapore	83	79	59
UK	-	-	< 0.5	Thailand	20	36	26
Other	-	-	2	UAE	1	16	8
TOTAL	1,432	1,211	1,234	India	-	-	4
				Other	34	55	12
				TOTAL	254	356	221

Source: GTA





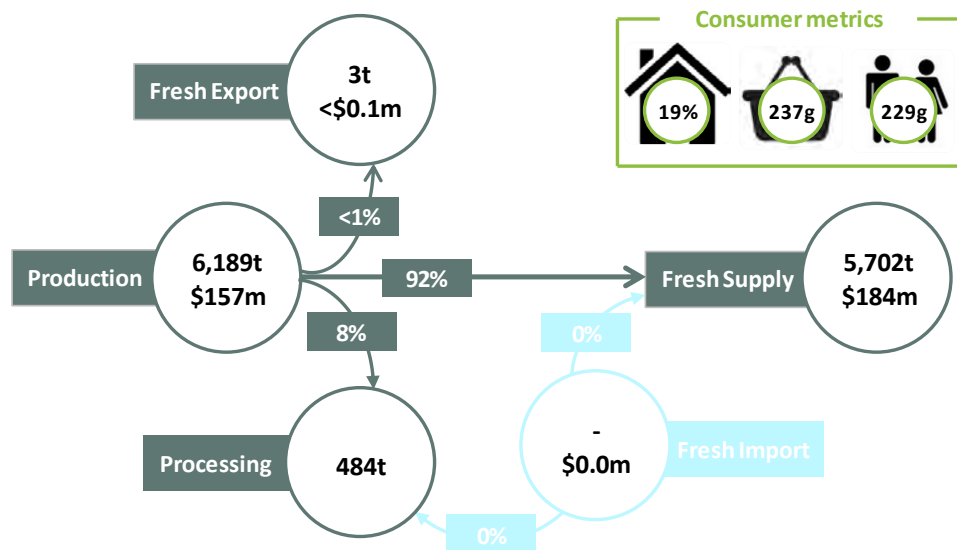
Fresh Rubus Berries Overview

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

For the year ending June 2018:

- **6,189 t** was produced.
- The value of production was **\$157.3 m** while the wholesale value of the fresh supply was **\$184.1 m**.
- **19%** of Australian households purchased fresh rubus berries, buying an average of **237 g** per shopping trip.
- The supply per capita was **229 g**, based on the volume of supply.

Fresh Rubus Berries Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	4,974	5,946	+20%	6,189	+4%
Production (\$m)	\$ 127.6	\$ 166.5	+30%	\$ 157.3	-6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	2	7	>100%	3	-53%
Fresh Export Value (\$m)	< \$0.1	\$ 0.2	>100%	< \$0.1	-64%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	4,504	5,468	+21%	5,702	+4%
Fresh Supply Wholesale Value (\$m)	\$ 149.1	\$ 194.6	+31%	\$ 184.1	-5%
Supply per Capita (kg)	0.19	0.22	+19%	0.23	+3%

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

Major Rubus Berries Production Areas

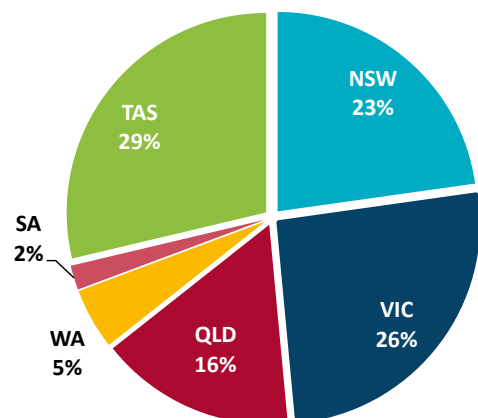
Major rubus berry producing regions include: **South East Queensland**; **North Coast**, **Central and Southern Tableland** regions in New South Wales; **Yarra Valley** in Victoria; **Northern & Southern Tasmania**; **Adelaide Hills** in South Australia; **Gin Gin** and the **Great Southern** region in Western Australia.



Source: BA



2017/18 Fresh Rubus Berries Production by State



Source: BA

Fresh Rubus Berries Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,409												
Victoria	1,593												
Queensland	980												
Western Australia	306												
South Australia	123												
Tasmania	1,777												
Availability legend		High		Medium		Low		None					

Source: BA

Main Rubus Berries Types

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

Raspberries, a bright red aggregate fruit with a hollow core. Raspberries accounted for **85%** of fresh production.

Blackberries, a black aggregate fruit with a white core. Blackberries accounted for **14%** of fresh production.



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

Seasonality by Rubus Berry Type

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

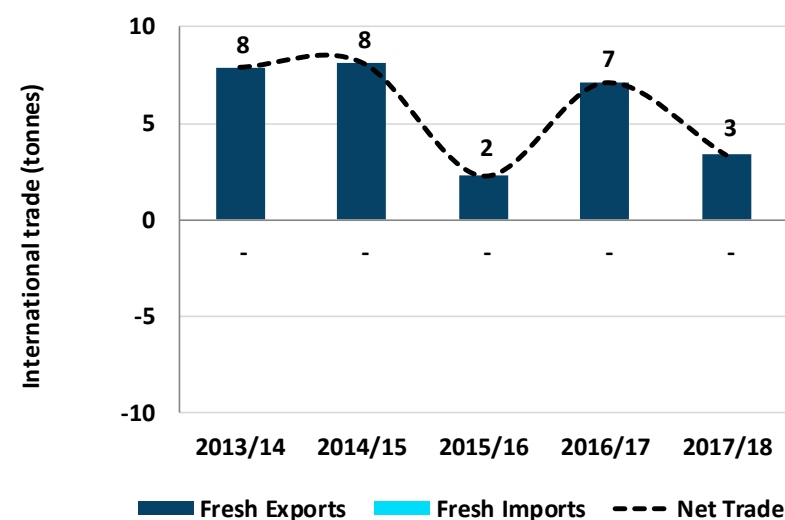
Type	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	5,261												
Blackberries	867												
Other	62												
Availability legend		High		Medium		Low		None					

Source: BA

Fresh Rubus Berries International Trade

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

Net Fresh Rubus Berries International Trade

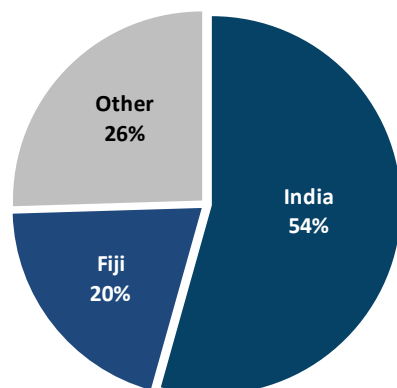


Source: GTA



For the year ending June 2018, **54%** of exported fresh rubus berries were sent to India, as profiled in the chart below.

2017/18 Fresh Rubus Berries Exports by Country



Source: GTA

Fresh Rubus Berries Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018
Victoria	1	1	2
New South Wales	< 0.5	2	1
Queensland	1	5	< 0.5
Tasmania	< 0.5	< 0.5	-
Other	< 0.5	< 0.5	< 0.5
TOTAL	2	7	3

Fresh Rubus Berries Exports by Country

Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018
India	-	< 0.5	2
Fiji	< 0.5	< 0.5	1
Indonesia	-	< 0.5	< 0.5
PNG	< 0.5	< 0.5	< 0.5
New Caledonia	-	< 0.5	< 0.5
Other	2	7	1
TOTAL	2	7	3

Source: GTA



Processed Rubus Berries International Trade

For the year ending June 2018, an additional **9,357 tonnes** of frozen rubus berries were imported, while **79 tonnes** were exported. These volumes have not been included in the fresh imports and exports profiled on page 81.

Frozen Imports

9,357t
\$39.9m

79t

\$488,157

Frozen Exports

Source: GTA





Fresh Strawberries Overview

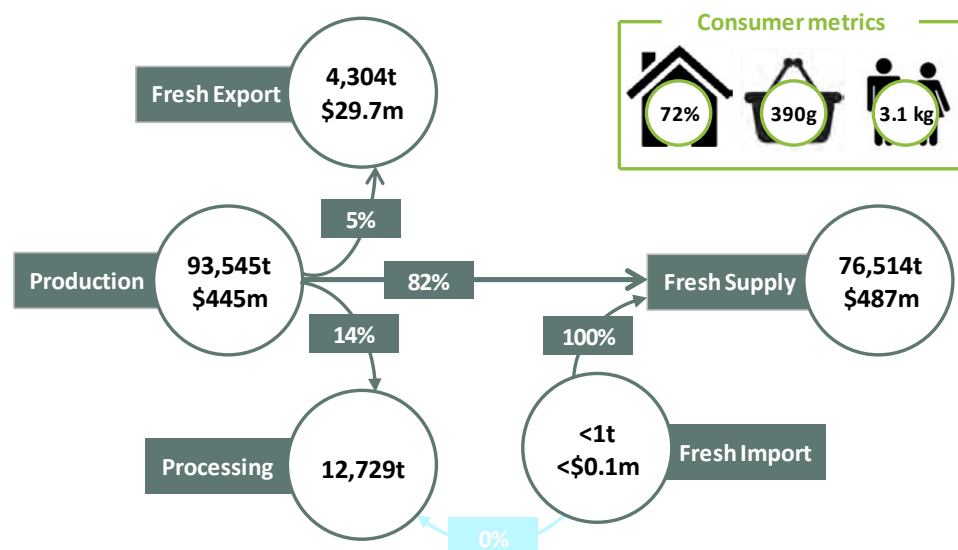
Strawberries are grown in most states in Australia. Year-round availability is made possible through the different regions.

For the year ending June 2018:

- **93,545 t** was produced with **14%** sent to be processed, predominantly in preserves.
- The value of production was **\$445.0 m** while the wholesale value of the fresh supply was **\$486.8 m**.
- **72%** of Australian households purchased fresh strawberries, buying an average of **390 g** per shopping trip.
- The supply per capita was **3.1 kg**, based on the volume supplied.



Fresh Strawberries Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	72,075	91,083	+26%	93,545	+3%
Production (\$m)	\$ 381.6	\$ 506.5	+33%	\$ 445.0	-12%
Production area (Ha)	1,995	2,265	+14%	-	-
Fresh Export Volume (t)	3,010	3,881	+29%	4,304	+11%
Fresh Export Value (\$m)	\$ 25.8	\$ 32.6	+26%	\$ 29.7	-9%
Fresh Import Volume (t)	14	-	-100%	<1	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	< \$0.1	-
Fresh Supply (t)	57,698	75,657	+31%	76,514	+1%
Fresh Supply Wholesale Value (\$m)	\$ 416.0	\$ 555.8	+34%	\$ 486.8	-12%
Supply per Capita (kg)	2.39	3.09	+29%	3.07	>-1%

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

Major Strawberry Production Areas

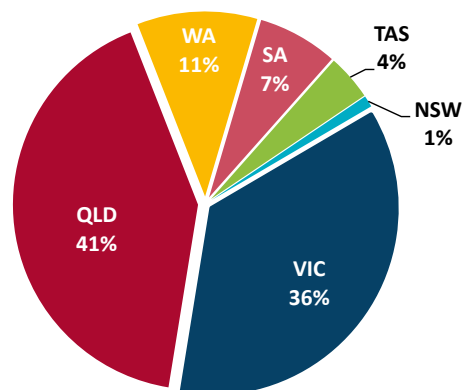
Strawberries are produced in almost all Australian states. The major producing areas include the **Yarra Valley** in Victoria; **Beerwah** in Queensland; **Camden** in New South Wales; the **Adelaide Hills** in South Australia; and **Wanneroo**, **Bullsbrook** and **Albany** in Western Australia.



Source: SAI



2017/18 Fresh Strawberries Production by State



Source: SAI

Fresh Strawberries Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	33,209												
Queensland	39,289												
Western Australia	9,822												
South Australia	6,548												
Tasmania	3,742												
New South Wales	935												
Availability legend		High		Medium		Low		None					

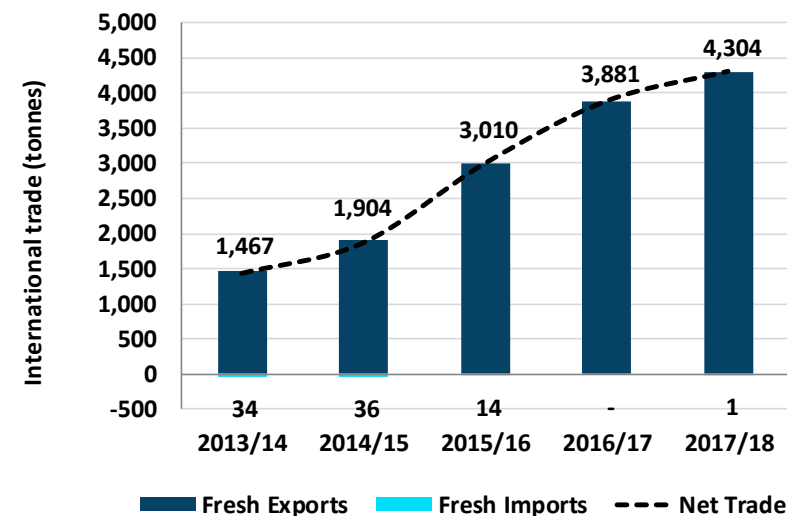
Source: SAI

Fresh Strawberries International Trade

Australia has traditionally been a net exporter of fresh strawberries, with exports having increased in recent years. For the year ending June 2018, Australia exported **4,304 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



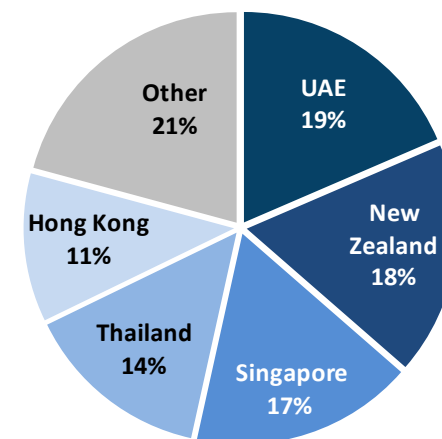
Net Fresh Strawberries International Trade



Source: GTA

For the year ending June 2018, **19%** of exported fresh strawberries were sent to UAE, as profiled in the chart below.

2017/18 Fresh Strawberries Exports by Country



Source: GTA



Fresh Strawberries Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	-	-	1	Western Australia	2,462	3,344	3,473
Victoria	14	-	-	Queensland	467	447	530
TOTAL	14	-	1	New South Wales	11	34	279
				Victoria	16	31	16
				South Australia	3	< 0.5	6
				Other	51	24	< 0.5
				TOTAL	3,010	3,881	4,304

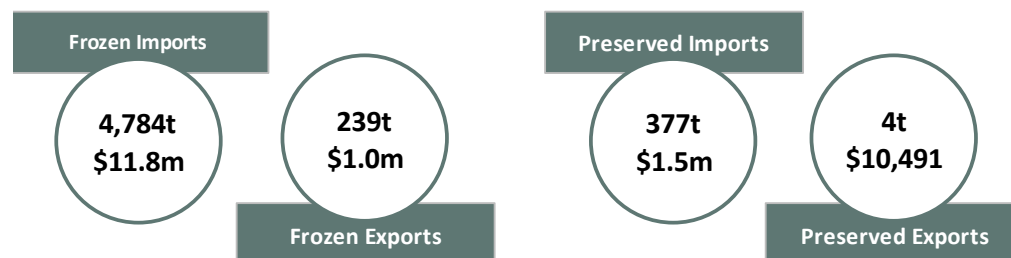
Fresh Strawberries Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Sth. Korea	-	-	1	UAE	590	757	797
China	14	-	-	New Zealand	491	574	770
TOTAL	14	-	1	Singapore	814	940	734
				Thailand	224	450	617
				Hong Kong	197	366	491
				Other	693	793	895
				TOTAL	3,010	3,881	4,304

Source: GTA

Processed Strawberries International Trade

For the year ending June 2018, an additional **4,784 tonnes** of frozen strawberries were imported, while **239 tonnes** were exported. Australia also imported **377 tonnes** of preserved strawberries, while exporting **4 tonnes** of preserved strawberries.



Source: GTA





Fresh Cherries Overview

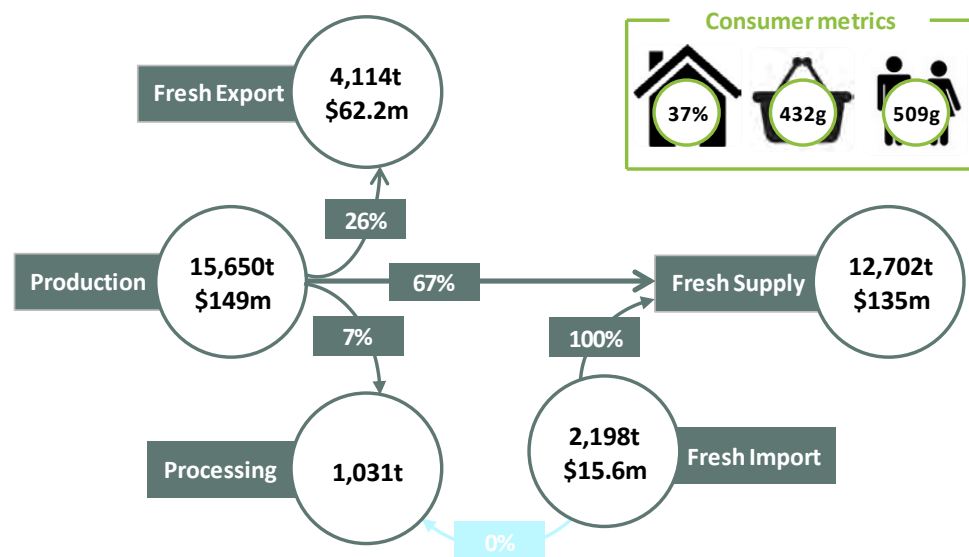
Cherries are produced during the summer months, with the majority of production occurring in the southern states of Australia.

For the year ending June 2018:

- **15,650 t** was produced with **7%** sent to be processed, predominantly in preserves.
- The value of production was **\$148.7 m** while the wholesale value of the fresh supply was **\$135.1 m**.
- **37%** of Australian households purchased fresh cherries, buying an average of **432 g** per shopping trip.
- The supply per capita was **509 g**, based on the volume supplied.



Fresh Cherries Supply Chain—Year Ending June 2018



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

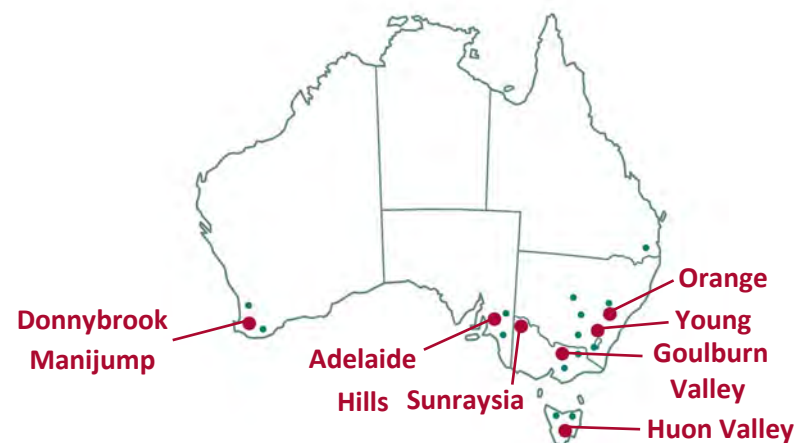


Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	18,584	11,012	-41%	15,650	+42%
Production (\$m)	\$ 164.2	\$ 120.7	-26%	\$ 148.7	+23%
Producing Trees (000 Trees)	1,886	2,150	+14%	-	-
Fresh Export Volume (t)	5,593	2,462	-56%	4,114	+67%
Fresh Export Value (\$m)	\$ 76.1	\$ 43.3	-43%	\$ 62.2	+44%
Fresh Import Volume (t)	1,505	2,295	+52%	2,198	-4%
Fresh Import Value (\$m)	\$ 11.9	\$ 19.5	+63%	\$ 15.6	-20%
Fresh Supply (t)	13,444	10,321	-23%	12,702	+23%
Fresh Supply Wholesale Value (\$m)	\$ 130.8	\$ 126.3	-3%	\$ 135.1	+7%
Supply per Capita (kg)	0.56	0.42	-24%	0.51	+21%

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

Major Cherry Production Areas

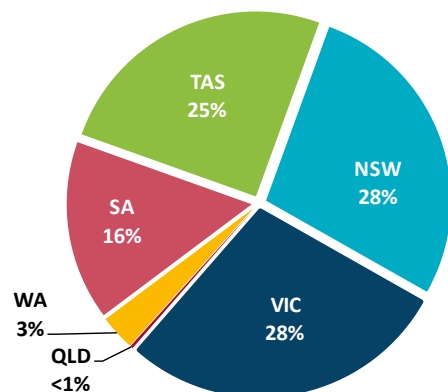
The majority of cherries are produced in the southern states of Australia, with major growing regions including **Orange** and **Young** in New South Wales; the **Huon Valley** in Tasmania; the **Goulburn Valley** and **Sunraysia** regions in Victoria; the **Adelaide Hills** in South Australia; and the **Donnybrook/Manijump** region in Western Australia.



Source: CGAI



2017/18 Fresh Cherries Production by State



Source: CGAI

Fresh Cherries Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	4,413												
New South Wales	4,327												
Tasmania	3,928												
South Australia	2,457												
Western Australia	485												
Queensland	39												
Imports	2,198												
Availability legend		<div>High</div> <div>Medium</div> <div>Low</div> <div>None</div>											

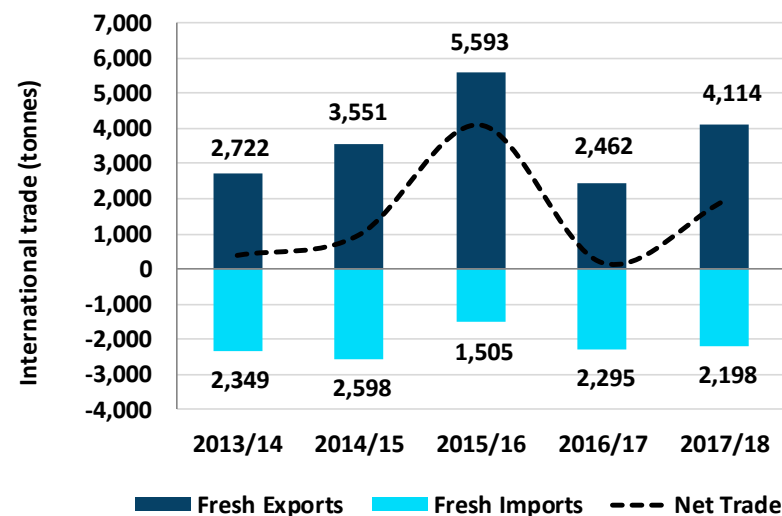
Source: CGAI

Fresh Cherries International Trade

Australia is now a net exporter of fresh cherries, after recent increases to export volumes, with the majority of this volume exported to Hong Kong and China. For the year ending June 2018, Australia imported **2,198 tonnes** of fresh cherries primarily from the United States, and exported **4,114 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



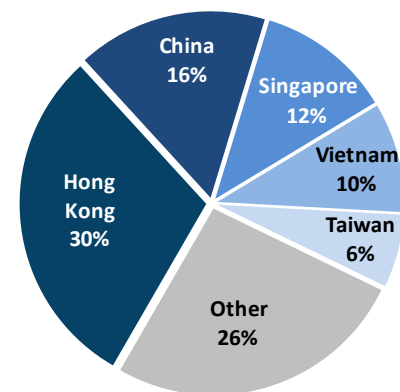
Net Fresh Cherry International Trade



Source: GTA

For the year ending June 2018, **30%** of exported fresh cherries were sent to Hong Kong, as profiled in the chart below.

2017/18 Fresh Cherries Exports by Country





Fresh Cherries Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	746	1,272	1,353	Tasmania	2,872	1,381	2,135
Victoria	382	556	456	Victoria	1,274	507	1,235
Queensland	237	279	216	New South Wales	1,033	539	604
Western Australia	140	187	173	South Australia	324	4	125
TOTAL	1,505	2,295	2,198	Queensland	17	7	16
				Other	72	24	< 0.5
				TOTAL	5,593	2,462	4,114

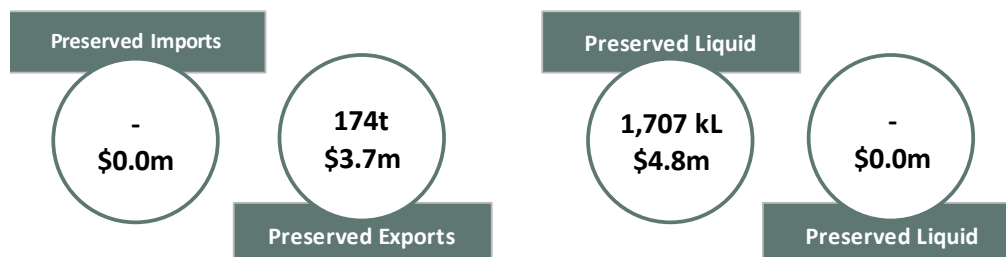
Fresh Cherries Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	1,484	2,286	2,188	Hong Kong	2,247	885	1,229
Canada	-	-	9	China	791	373	678
Iran	1	-	1	Singapore	519	276	480
Netherlands	1	1	1	Vietnam	< 0.5	-	392
Serbia	8	8	-	Taiwan	508	165	260
Other	11	1	< 0.5	Other	1,528	762	1,076
TOTAL	1,505	2,295	2,198	TOTAL	5,593	2,462	4,114

Source: GTA

Processed Cherries International Trade

For the year ending June 2018, an additional **1,707 kilolitres** of preserved cherries in liquid were imported, while **174 tonnes** of preserved cherries were exported.



Source: GTA





Fresh Citrus Fruit Overview

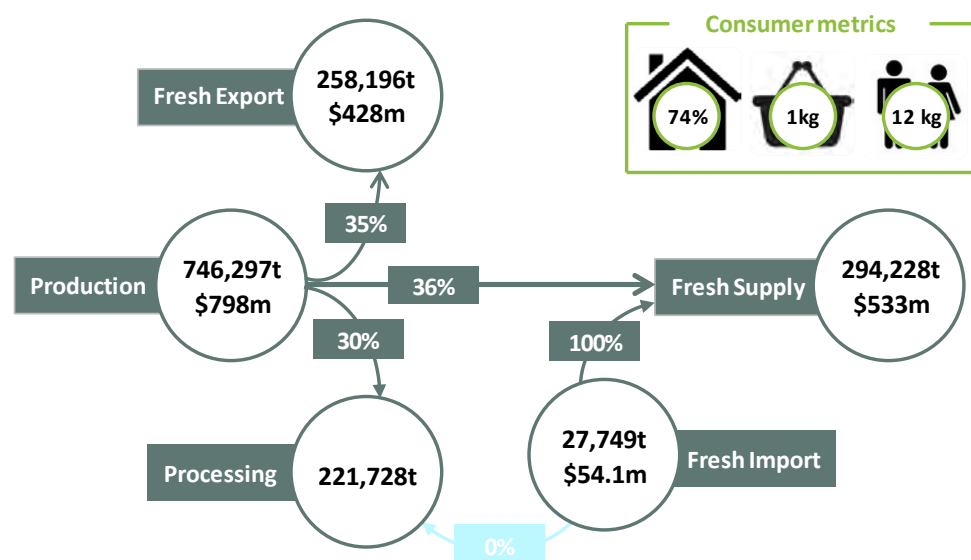
Pages 96-97 profile total citrus fruit production and trade. They combine information on grapefruit, lemons/limes, mandarins and oranges. The following pages profile each citrus fruit category in more detail.

For the year ending June 2018:

- **746,297 t** was produced.
- The value of production was **\$797.8 m** while the wholesale value of the fresh supply was **\$533.0 m**.
- **74%** of Australian households purchased a citrus fruit, buying an average of **1 kg** per shopping trip.
- The supply per capita of citrus for the year ending June 2018 was **12 kg**, based on the volume supplied.



Fresh Citrus Fruit Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	714,154	718,292	<1%	746,297	+4%
Production (\$m)	\$ 678.5	\$ 742.0	+9%	\$ 797.8	+8%
Producing Trees (000 Trees)	9,656	9,867	+2%	-	-
Fresh Export Volume (t)	214,164	218,211	+2%	258,196	+18%
Fresh Export Value (\$m)	\$ 297.3	\$ 331.7	+12%	\$ 427.8	+29%
Fresh Import Volume (t)	25,493	34,061	+34%	27,749	-19%
Fresh Import Value (\$m)	\$ 56.1	\$ 70.2	+25%	\$ 54.1	-23%
Fresh Supply (t)	305,415	313,304	+3%	294,228	-6%
Fresh Supply Wholesale Value (\$m)	\$ 525.7	\$ 580.1	+10%	\$ 533.0	-8%
Supply per Capita (kg)	12.67	12.78	<1%	11.80	-8%

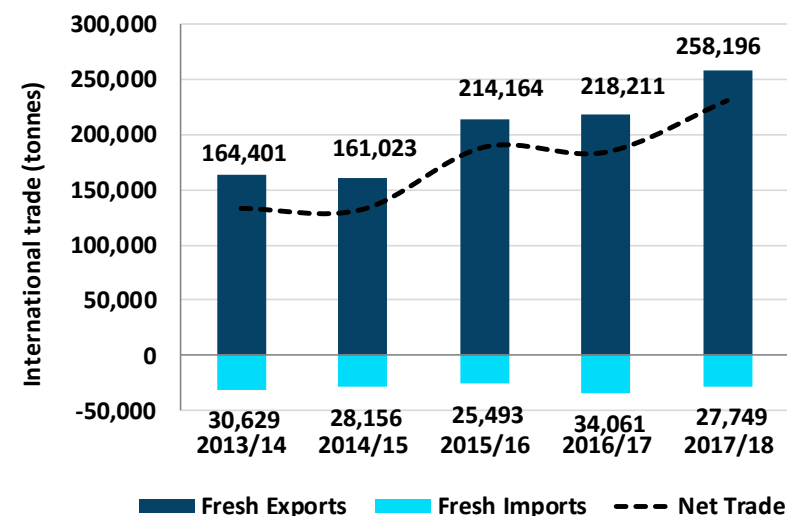
Sources: ABS; AC; CA; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Fresh Citrus Fruit International Trade

Australia is a net citrus fruit exporter. For the year ending June 2018, Australia exported **258,196 tonnes*** of fresh citrus fruit, as profiled in the graph below, where imports are counted as negative tonnes.

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

Net Fresh Citrus International Trade



Source: GTA



Fresh Grapefruit Overview

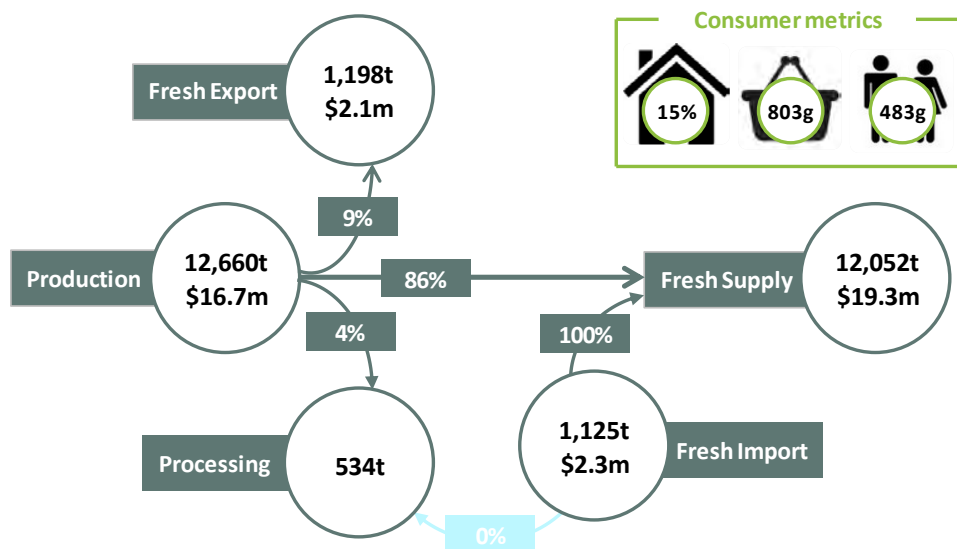
Grapefruit production occurs predominantly in the Murray Valley region. Imports, as well as production from Western Australia and the Northern Territory, allow for close to year round availability.

For the year ending June 2018:

- **12,660 t** was produced with **4%** sent to be processed, predominantly in juicing.
- The value of production was **\$16.7 m** while the wholesale value of the fresh supply was **\$19.3 m**.
- **15%** of Australian households purchased grapefruit, buying an average of **803 g** per shopping trip.
- The supply per capita was **483 g**, based on the volume supplied.



Fresh Grapefruit Fresh Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	12,618	12,647	<1%	12,660	<1%
Production (\$m)	\$ 16.4	\$ 17.4	+6%	\$ 16.7	-4%
Producing Trees (000 Trees)	162	-	-	-	-
Fresh Export Volume (t)	438	1,197	>100%	1,198	<1%
Fresh Export Value (\$m)	\$ 0.7	\$ 2.5	>100%	\$ 2.1	-15%
Fresh Import Volume (t)	1,036	1,291	+25%	1,125	-13%
Fresh Import Value (\$m)	\$ 1.8	\$ 2.5	+38%	\$ 2.3	-9%
Fresh Supply (t)	12,616	12,208	-3%	12,052	-1%
Fresh Supply Wholesale Value (\$m)	\$ 20.2	\$ 20.0	>-1%	\$ 19.3	-4%
Supply per Capita (kg)	0.52	0.50	-5%	0.48	-3%

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

Major Grapefruit Production Areas

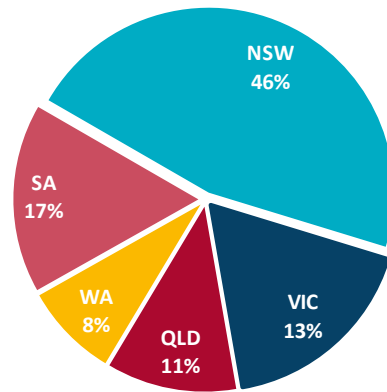
The majority of grapefruit production occurs in the **Riverina** region in New South Wales. Other major producing regions are **Murray Valley** in Victoria; **Central Burnett** in Queensland; **Riverland region** of South Australia, **Perth region** of Western Australia. There are smaller plantings in the Northern Territory.



Source: CA



2017/18 Fresh Grapefruit Production by State



Source: CA

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,697												
Victoria	2,152												
Queensland	1,393												
Western Australia	1,013												
South Australia	2,026												
Northern Territory	380												
Imported	1,125												
Availability legend			High		Medium		Low						None

Fresh Grapefruit Seasonality by State

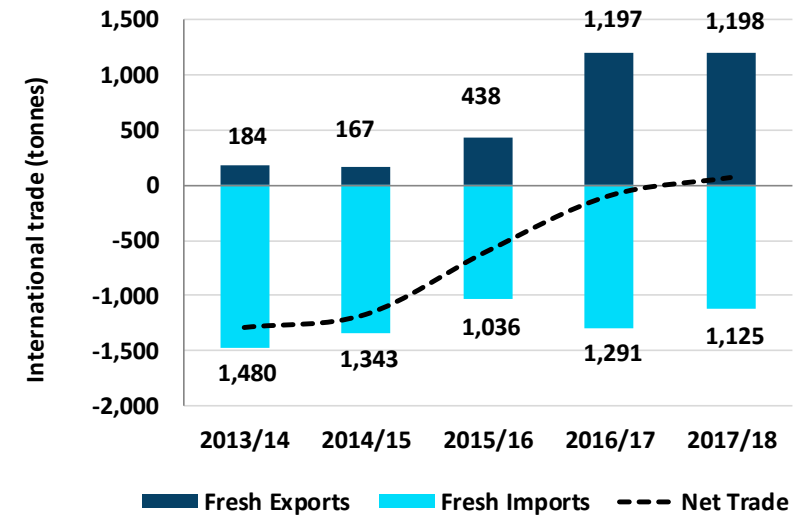
Source: CA

Fresh Grapefruit International Trade

Australia has traditionally been a net importer of fresh grapefruit, typically importing 1,000+ tonnes per year. For the year ending June 2018, Australia exported **1,198 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



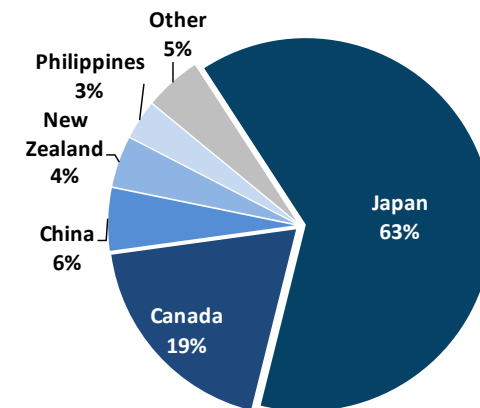
Net Fresh Grapefruit International Trade



Source: GTA

For the year ending June 2018, **63%** of exported fresh grapefruit was sent to Japan, as profiled in the chart below.

2017/18 Fresh Grapefruit Exports by Country



Source: GTA



Fresh Grapefruit Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	411	589	427	South Australia	190	455	689
Victoria	307	339	377	New South Wales	87	257	346
Western Australia	245	258	275	Victoria	132	460	155
Queensland	73	104	46	Queensland	26	17	7
Other	-	-	-	Western Australia	-	9	-
TOTAL	1,036	1,291	1,125	Other	2	< 0.5	< 0.5
				TOTAL	438	1,197	1,198

Fresh Grapefruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	761	957	624	Japan	117	779	756
Israel	275	320	374	Canada	48	153	227
Egypt	-	-	127	China	18	-	65
New Zealand	-	14	-	New Zealand	27	31	53
Thailand	< 0.5	-	-	Philippines	11	4	40
Other	< 0.5	-	-	Other	217	231	58
TOTAL	1,036	1,291	1,125	TOTAL	438	1,197	1,198

Source: GTA

Processed Grapefruit International Trade

For the year ending June 2018, an additional **121 tonnes** of solid grapefruit juice were imported, while **406 kilolitres** were exported.



Source: GTA





Fresh Lemons/Limes

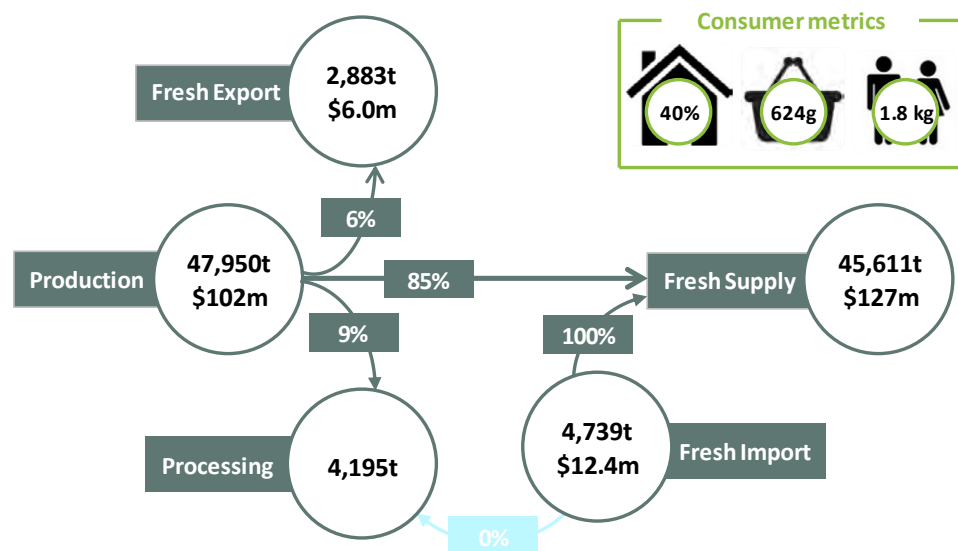
Overview

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

For the year ending June 2018:

- **47,950 t** was produced with **9%** sent to be processed, predominantly in juicing.
- The value of production was **\$102.3 m** while the wholesale value of the fresh supply was **\$127.0 m**.
- **40%** of Australian households purchased fresh lemons or limes, buying an average of **624 g** per shopping trip.
- The supply per capita was **1.8 kg**, based on the volume supplied.

Fresh Lemons/Limes Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	44,757	41,436	-7%	47,950	+16%
Production (\$m)	\$ 113.4	\$ 105.2	-7%	\$ 102.3	-3%
Producing Trees (000 Trees)	568	-	-	-	-
Fresh Export Volume (t)	4,088	1,724	-58%	2,883	+67%
Fresh Export Value (\$m)	\$ 9.6	\$ 4.8	-50%	\$ 6.0	+26%
Fresh Import Volume (t)	6,464	7,812	+21%	4,739	-39%
Fresh Import Value (\$m)	\$ 19.7	\$ 22.3	+13%	\$ 12.4	-44%
Fresh Supply (t)	43,079	43,797	+2%	45,611	+4%
Fresh Supply Wholesale Value (\$m)	\$ 144.9	\$ 144.2	>-1%	\$ 127.0	-12%
Supply per Capita (kg)	1.79	1.79	>-1%	1.83	+2%

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

Major Lemons/Limes Production Areas

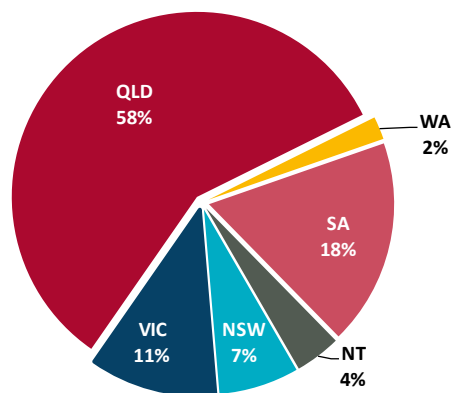
Half of all lemons and limes are grown in Queensland, with major growing regions including **Mareeba**, **Burnett** and **Bundaberg**. **Lismore** in northern New South Wales, **Riverland** in South Australia and **Darwin** in the Northern Territory are other major growing regions.



Source: CA



2017/18 Fresh Lemons/Limes Production by State



Source: CA

Fresh Lemons/Limes Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,357												
Victoria	5,275												
Queensland	27,811												
Western Australia	959												
South Australia	8,631												
Northern Territory	1,918												
Imported	4,739												
Availability legend			High		Medium		Low						

Source: CA

Main Lemons/Limes Category

For the year ending June 2018:

Lemons accounted for **77%** of fresh production.

Limes accounted for **23%** of fresh production.



Seasonality by Lemons/Limes Category

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

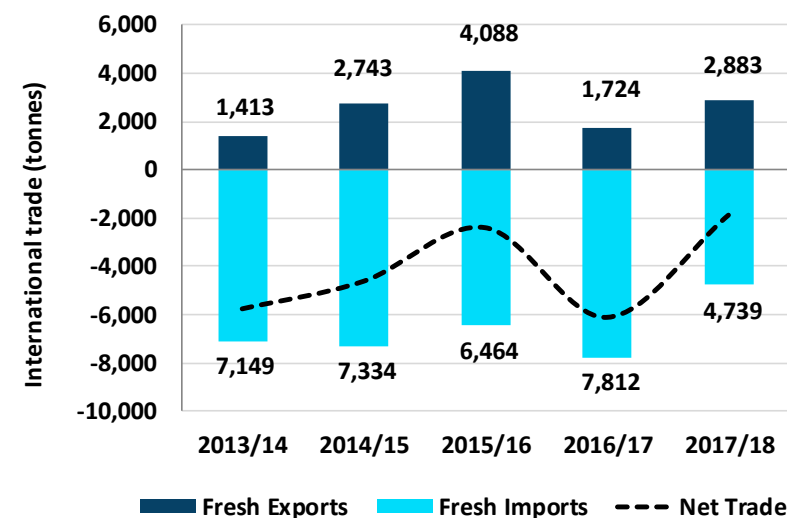
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	36,723												
Limes	11,227												
Availability legend			High		Medium		Low						

Source: CA

Fresh Lemons/Limes International Trade

Australia is a net importer of lemons and limes, with a significant amount of imports being sourced from the US. Exports have been growing in the last 2 years. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Lemons/Limes International Trade

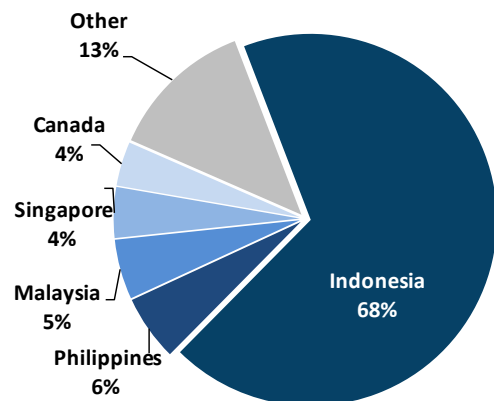


Source: GTA



For the year ending June 2018, **68%** of exported fresh lemons and limes were sent to Indonesia, as profiled in the chart below.

2017/18 Fresh Lemons/Limes Exports by Country



Source: GTA

Fresh Lemons/Limes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	2,517	4,003	2,221	South Australia	504	219	1,067
Victoria	1,836	1,989	1,336	Queensland	2,659	987	1,025
Western Australia	1,029	1,087	798	Victoria	502	318	587
Queensland	1,082	617	383	New South Wales	343	151	149
South Australia	< 0.5	116	-	Western Australia	< 0.5	< 0.5	9
Other	< 0.5	-	-	Other	79	48	46
TOTAL	6,464	7,812	4,739	TOTAL	4,088	1,724	2,883

Fresh Lemons/Limes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	5,666	6,163	2,986	Indonesia	2,752	943	1,967
Egypt	563	1,367	1,651	Philippines	262	218	164
New Zealand	33	243	77	Malaysia	71	11	150
Spain	196	20	23	Singapore	392	190	127
UAE	1	4	1	Canada	147	142	111
Other	6	15	-	Other	464	220	363
TOTAL	6,464	7,812	4,739	TOTAL	4,088	1,724	2,883

Source: GTA





Fresh Mandarins Overview

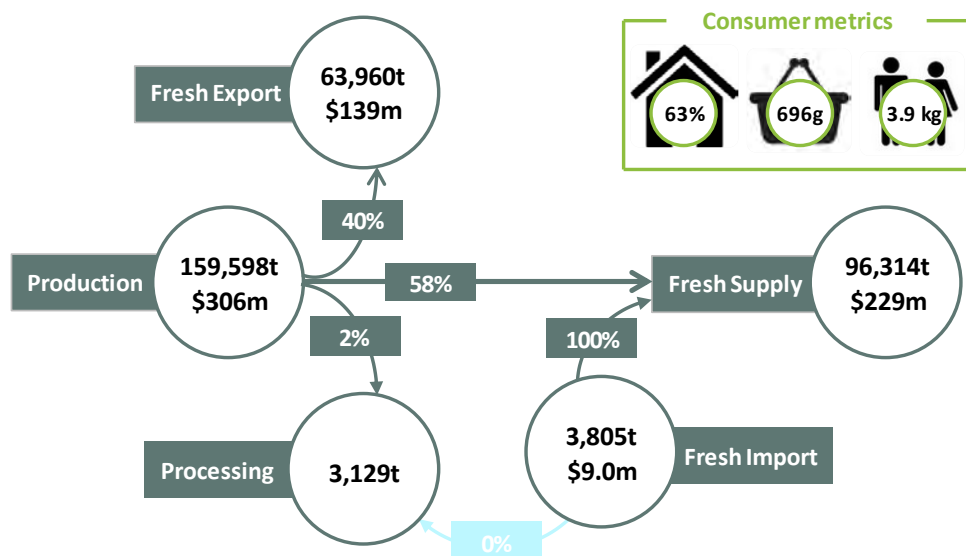
Mandarin production occurs across most states in Australia. Mandarins grow during the winter months.

For the year ending June 2018:

- **159,598 t** was produced with **2%** sent to be processed, predominantly in juicing.
- The value of production was **\$305.8 m** while the wholesale value of the fresh supply was **\$229.0 m**.
- **63%** of Australian households purchased fresh mandarins, buying an average of **696 g** per shopping trip.
- The supply per capita was **3.9 kg**, based on the volume supplied.



Fresh Mandarins Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	153,275	157,818	+3%	159,598	+1%
Production (\$m)	\$ 246.4	\$ 285.9	+16%	\$ 305.8	+7%
Producing Trees (000 Trees)	2,330	2,268	-3%	-	-
Fresh Export Volume (t)	48,974	51,041	+4%	63,960	+25%
Fresh Export Value (\$m)	\$ 84.8	\$ 100.1	+18%	\$ 139.1	+39%
Fresh Import Volume (t)	3,375	4,255	+26%	3,805	-11%
Fresh Import Value (\$m)	\$ 9.1	\$ 10.4	+15%	\$ 9.0	-14%
Fresh Supply (t)	104,670	107,938	+3%	96,314	-11%
Fresh Supply Wholesale Value (\$m)	\$ 211.4	\$ 245.3	+16%	\$ 229.0	-7%
Supply per Capita (kg)	4.34	4.40	+1%	3.86	-12%

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

Major Mandarins Production Areas

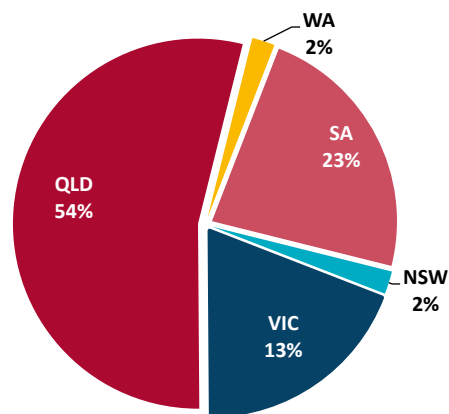
Mandarins are produced in most Australian states. The major producing areas include **Mareeba**, **Emerald** and **Mundubbera** in Queensland, and the **Murray Valley** and **Riverland** areas around the border of South Australia, Victoria and New South Wales.



Source: CA



2017/18 Fresh Mandarins Production by State



Sources: CA

Fresh Mandarins Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,192												
Victoria	30,324												
Queensland	86,183												
Western Australia	3,192												
South Australia	36,708												
Imported	3,805												
Availability legend		High		Medium		Low		None					

Source: CA

Main Mandarins Varieties

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

Imperial mandarins, an early season mandarin with fine smooth glossy skin and a low seed count. Imperial mandarins accounted for **25%** of fresh production for the year ending June 2018.

Murcott (including **Honey Murcott**), a seeded yellow-orange mandarin. Murcott mandarins accounted for **38%** of fresh production.

Afourer, a mostly seedless variety, accounted for **22%** of fresh production.



Seasonality by Mandarins Variety

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

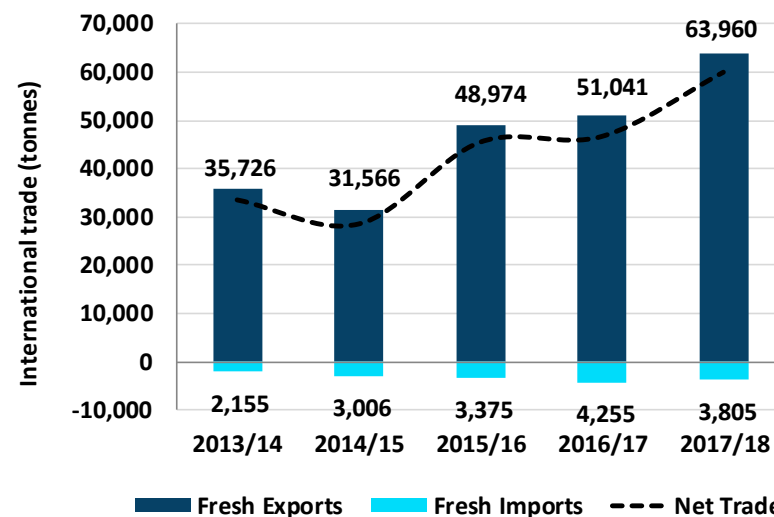
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Imperial	39,117												
Murcott	59,458												
Afourer	34,423												
Others	23,470												
Processing	3,129												
Availability legend		High		Medium		Low		None					

Source: CA

Fresh Mandarins International Trade

Australia is a net exporter of fresh mandarins, growth in volumes over the last three years has resulted in an average of 54,700 tonnes exported per year. Exports increased sharply this year. For the year ending June 2018, Australia exported **63,960 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Mandarins International Trade

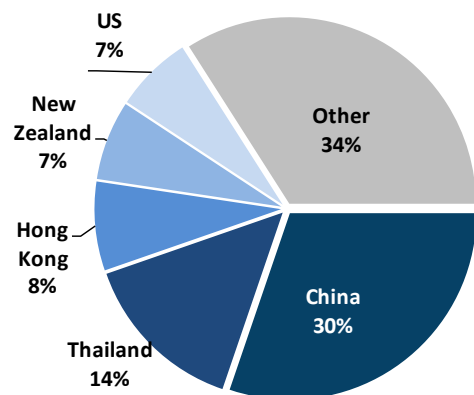


Source: GTA



Australia exports to a number of countries. For the year ending June 2018, **30%** of exported mandarins were sent to China, as profiled in the chart below.

2017/18 Fresh Mandarins Export by Country



Source: GTA

Fresh Mandarins Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Western Australia	955	1,375	1,188	Queensland	28,273	30,525	44,374
New South Wales	922	1,565	1,073	South Australia	9,958	10,695	15,210
Victoria	1,127	930	1,039	Victoria	8,487	7,324	3,472
Queensland	371	385	505	New South Wales	532	418	839
Other	< 0.5	-	-	Western Australia	7	30	42
TOTAL	3,375	4,255	3,805	Other	1,716	2,048	23
				TOTAL	48,974	51,041	63,960

Fresh Mandarins Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	2,111	2,808	1,714	China	7,789	9,461	19,337
Egypt	136	862	1,425	Thailand	7,024	7,884	9,237
Israel	647	535	603	Hong Kong	3,411	3,692	4,926
Spain	445	23	48	New Zealand	5,161	3,811	4,411
New Zealand	15	23	15	US	2,292	3,586	4,279
Other	21	4	< 0.5	Other	23,298	22,606	21,769
TOTAL	3,375	4,255	3,805	TOTAL	48,974	51,041	63,960

Source: GTA



Fresh Oranges Overview

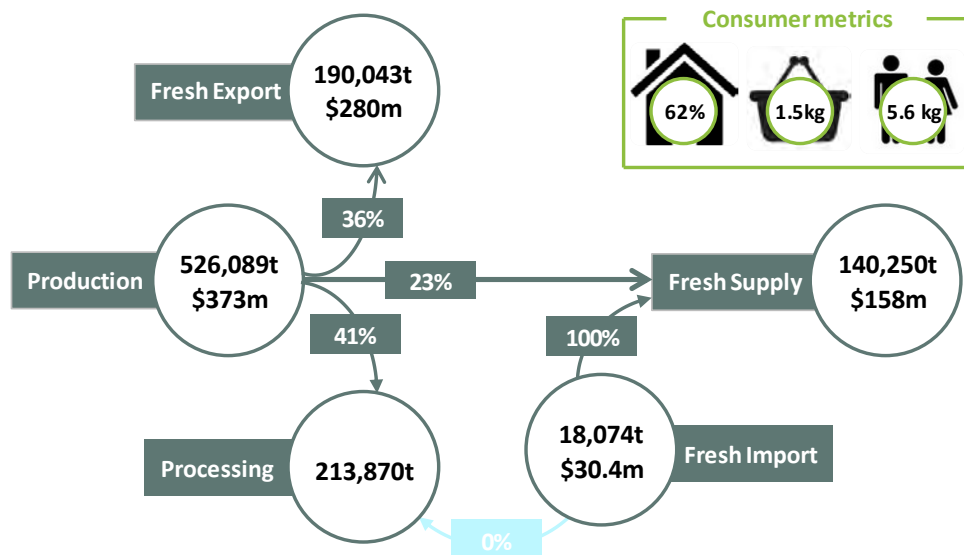
Orange production occurs predominantly in the southern states of Australia. Production is dominated by 2 main varieties; Navel oranges, available during the winter months, and Valencia oranges, available during the summer months.

For the year ending June 2018:

- **526,089 t** was produced with **42%** sent to be processed, predominantly in juicing.
- The value of production was **\$373.0 m** while wholesale value of the fresh supply was **\$157.8 m**.
- **62%** of Australian households purchased fresh oranges, buying an average of **1.5 kg** per shopping trip.
- The supply per capita was **5.6 kg**, based on the volume supplied.



Fresh Orange Supply Chain—Year Ending June 2018



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

Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	503,504	506,391	<1%	526,089	+4%
Production (\$m)	\$ 302.2	\$ 333.5	+10%	\$ 373.0	+12%
Producing Trees (000 Trees)	6,596	6,729	+2%	-	-
Fresh Export Volume (t)	160,580	164,044	+2%	190,043	+16%
Fresh Export Value (\$m)	\$ 202.1	\$ 223.8	+11%	\$ 280.1	+25%
Fresh Import Volume (t)	14,587	20,694	+42%	18,074	-13%
Fresh Import Value (\$m)	\$ 25.3	\$ 35.0	+38%	\$ 30.4	-13%
Fresh Supply (t)	145,050	149,361	+3%	140,250	-6%
Fresh Supply Wholesale Value (\$m)	\$ 149.2	\$ 170.6	+14%	\$ 157.8	-8%
Supply per Capita (kg)	6.02	6.09	+1%	5.63	-8%

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

Major Orange Production Areas

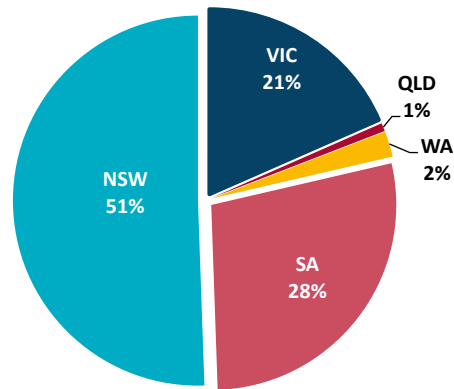
The majority of orange production occurs in the **Riverina** and **Murray Valley** areas on the New South Wales and Victorian borders. Other major producing areas include the **Riverland Region** in South Australia.



Source: CA



2017/18 Fresh Oranges Production by State



Source: CA

Fresh Oranges Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	268,068												
Victoria	96,882												
Queensland	3,775												
Western Australia	9,697												
South Australia	147,667												
Imported	18,074												
Availability legend			High		Medium		Low						None

Source: CA

Main Orange Varieties

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

Navel oranges, an orange that grows during the winter months. The majority of navels grown are destined for the fresh market, and accounted for **87%** of the production sent to the **fresh market**.

Valencia oranges, an orange that grows during the summer months. The majority of Valentias grown are destined for the juicing market, and accounted for **13%** of **fresh production** but contributed the majority of processed production.

Other varieties, including blood oranges and Cara Cara oranges, accounted for **less than 1% of fresh production**.

Seasonality by Orange Variety

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

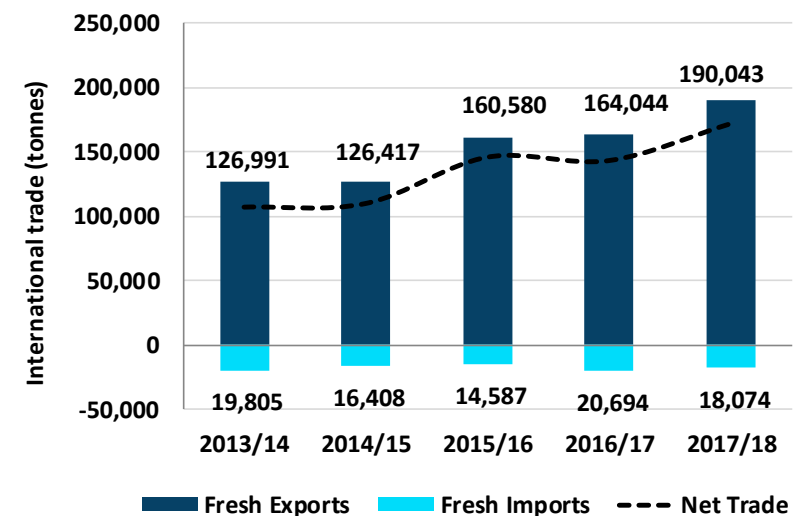
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	270,128												
Valencia	39,793												
Other	2,298												
Processing	213,870												
Availability legend			High		Medium		Low						None

Source: CA

Fresh Oranges International Trade

Australia is a net exporter of fresh oranges, growth in volumes over the last three years has in an average of 172,000 tonnes exported per year. Exports increased again this year. For the year ending June 2018, Australia exported **190,043 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Oranges International Trade

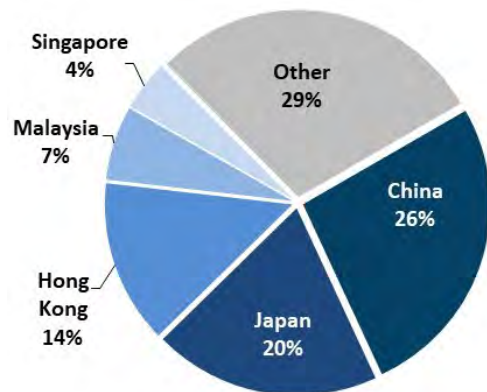


Source: GTA



For the year ending June 2018, **26%** of exported fresh oranges were sent to China, as profiled in the chart below.

2017/18 Fresh Oranges Exports by Country



Source: GTA

Fresh Oranges Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Victoria	4,563	7,011	6,779	Victoria	70,887	76,536	89,127
New South Wales	4,456	6,600	5,892	South Australia	64,971	58,928	68,121
Western Australia	2,852	3,740	2,744	New South Wales	21,272	23,683	27,918
Queensland	2,692	2,490	2,620	Western Australia	1,617	1,917	2,550
South Australia	24	852	39	Queensland	1,310	2,633	1,579
TOTAL	14,587	20,694	18,074	Other	522	346	748
				TOTAL	160,580	164,044	190,043

Fresh Oranges Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	13,116	15,249	13,127	China	23,034	34,051	50,204
Egypt	987	4,855	4,550	Japan	29,898	33,021	37,215
Israel	282	310	325	Hong Kong	39,641	25,773	26,896
Spain	50	45	72	Malaysia	11,991	11,417	12,209
South Africa	-	-	< 0.5	Singapore	11,460	9,929	8,249
Other	153	233	< 0.5	Other	44,555	49,853	55,270
TOTAL	14,587	20,694	18,074	TOTAL	160,580	164,044	190,043

Source: GTA



Processed Oranges International Trade

For the year ending June 2018, an additional **16,273 kilolitres** of frozen orange juice was imported. Australia also imported **2,336 kilolitres** of fresh orange juice, while exporting **2,814 kilolitres** of fresh orange juice.



Source: GTA



Fresh Custard Apples

Overview

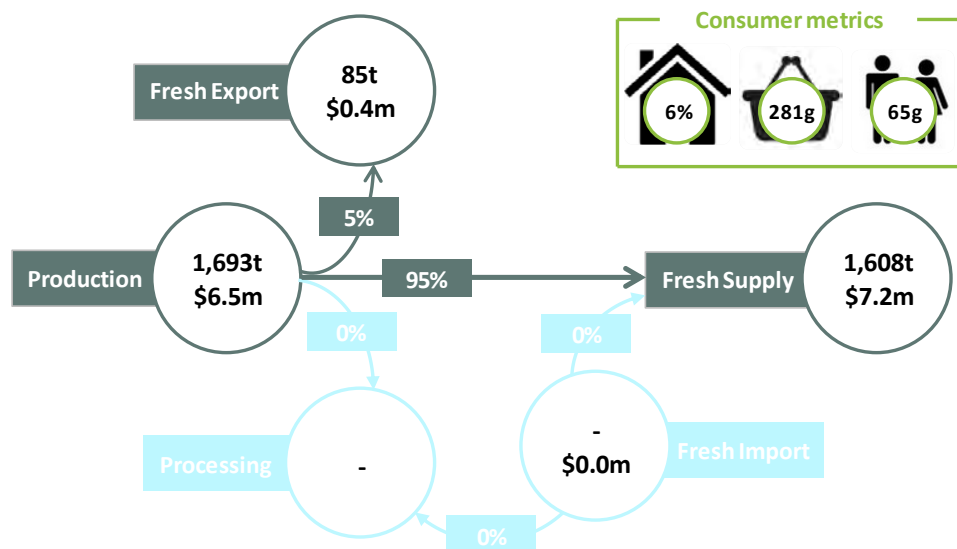
Custard apple production occurs in Queensland and northern New South Wales. The volume of custard apples that Australia imports and exports is negligible. The type of custard apple grown in Australia is unique in the world, known botanically as an atemoya.

For the year ending June 2018:

- **1,693 t** was produced.
- The value of production was **\$6.5 m** while the wholesale value of the fresh supply was **\$7.2 m**.
- **6%** of Australian households purchased fresh custard apples, buying an average of **281 g** per shopping trip.
- The supply per capita was **65 g**, based on the volume supplied.



Fresh Custard Apples Supply Chain—Year Ending June 2018



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

Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,700	1,764	+4%	1,693	-4%
Production (\$m)	\$ 6.8	\$ 7.1	+5%	\$ 6.5	-9%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	85	88	+4%	85	-4%
Fresh Export Value (\$m)	\$ 0.4	\$ 0.5	+5%	\$ 0.4	-9%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,615	1,676	+4%	1,608	-4%
Fresh Supply Wholesale Value (\$m)	\$ 7.5	\$ 7.9	+5%	\$ 7.2	-9%
Supply per Capita (kg)	0.07	0.07	+2%	0.06	-6%

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

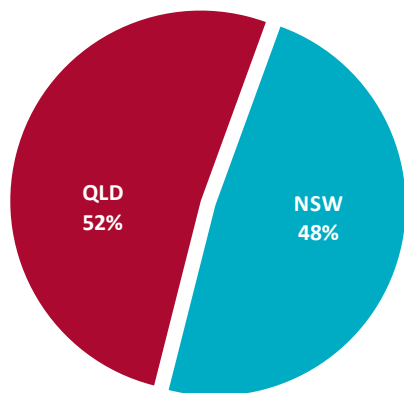
Major Custard Apples Production Areas

The majority of custard apples are grown along the east coast of Australia, from north Queensland to northern New South Wales. Major growing regions include the **Atherton** and **Sunshine Coast** regions of Queensland, and **Lismore** in northern New South Wales.



Source: CAA

2017/18 Fresh Custard Apple Production by State



Source: CAA

Fresh Custard Apples Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	819												
Queensland	874												
Availability legend			High		Medium		Low						

Source: CAA





Fresh Kiwifruit Overview

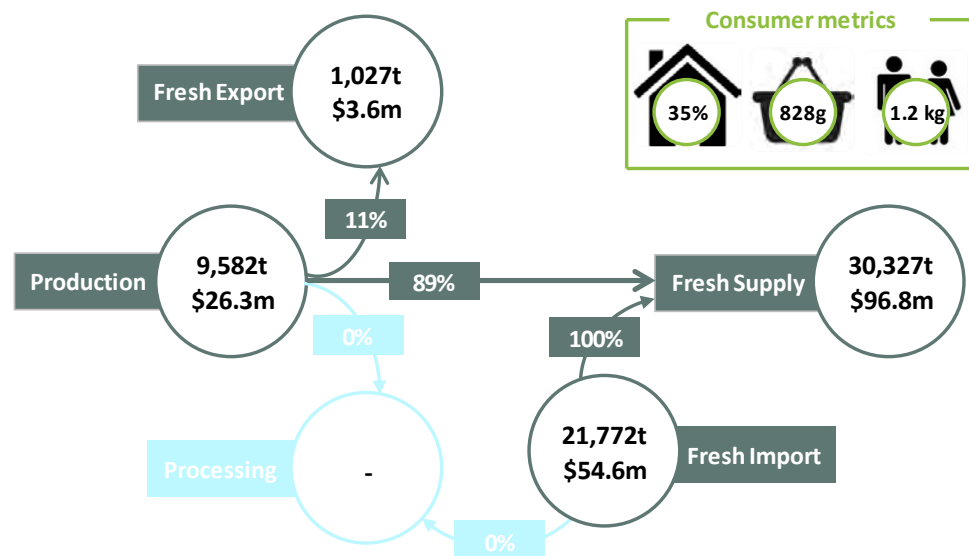
Kiwifruit production occurs predominantly in the southern states of Australia, with a larger volume being sourced from imports. The Australian season occurs between March and July. Year-round availability is made possible through imports, predominantly from New Zealand.

For the year ending June 2018:

- **9,582 t** was produced.
- The value of production was **\$26.3 m** while the wholesale value of the fresh supply was **\$96.8 m**.
- **35%** of Australian households purchased fresh kiwifruit, buying an average of **828 g** of kiwifruit per shopping trip.
- The supply per capita was **1.22 kg**, based on the volume supplied.



Fresh Kiwifruit Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,554	9,791	+2%	9,582	-2%
Production (\$m)	\$ 21.5	\$ 20.4	-5%	\$ 26.3	+28%
Production area (Ha)	129	-	-	-	-
Fresh Export Volume (t)	1,004	944	-6%	1,027	+9%
Fresh Export Value (\$m)	\$ 4.2	\$ 3.0	-28%	\$ 3.6	+20%
Fresh Import Volume (t)	23,254	23,527	+1%	21,772	-7%
Fresh Import Value (\$m)	\$ 50.4	\$ 50.9	+1%	\$ 54.6	+7%
Fresh Supply (t)	31,804	32,374	+2%	30,327	-6%
Fresh Supply Wholesale Value (\$m)	\$ 78.6	\$ 77.0	-2%	\$ 96.8	+26%
Supply per Capita (kg)	1.32	1.32	<1%	1.22	-8%

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

Major Kiwifruit Production Areas

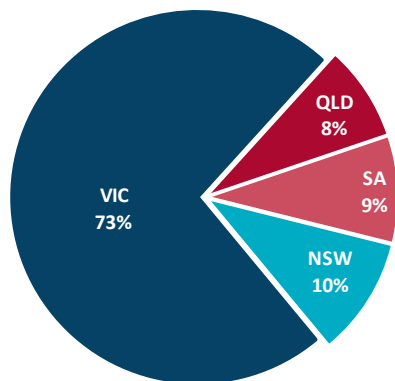
Kiwifruit occurs predominantly in the southern states of Australia. The **Goulburn Valley** region of Victoria is currently the major production area.



Source: (Freshlogic Analysis)



2017/18 Fresh Kiwifruit Production by State



Source: (Freshlogic Analysis)

Fresh Kiwifruit Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	968												
Victoria	6,968												
Queensland	774												
South Australia	871												
Imported	21,772												
Availability legend			High		Medium		Low						

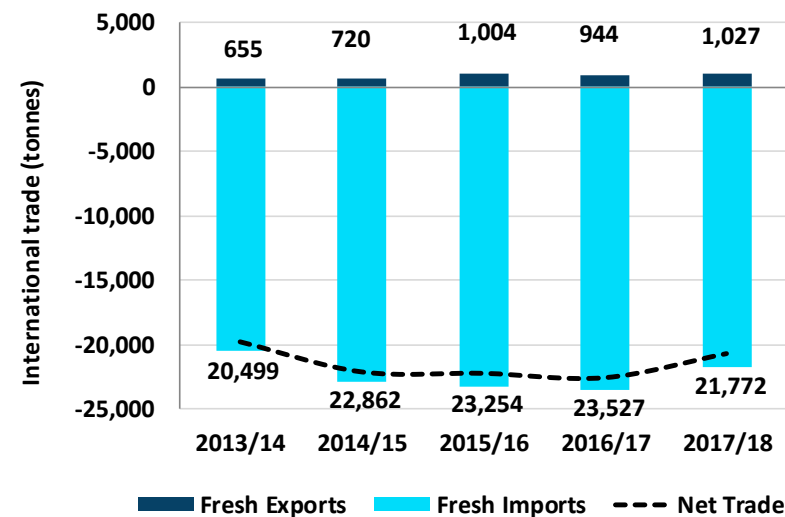
Source: (Freshlogic Analysis)

Fresh Kiwifruit International Trade

Australia is a net importer of fresh kiwifruit, typically importing between 20,000-24,000 tonnes per year. For the year ending June 2018, Australia imported **21,772 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



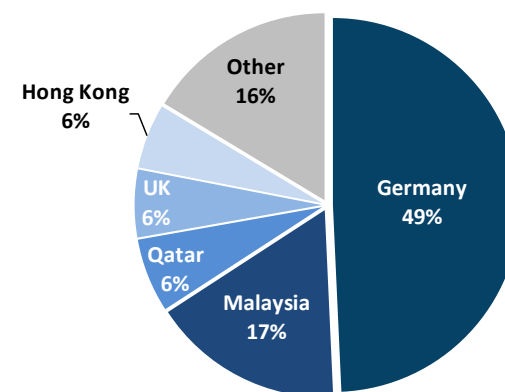
Net Fresh Kiwifruit International Trade



Source: GTA

For the year ending June 2018, **49%** of exported fresh kiwifruit was sent to Germany, as profiled in the chart below.

2017/18 Fresh Kiwifruit Exports by Country



Source: GTA



Fresh Kiwifruit Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	10,232	9,763	8,940	Victoria	549	744	796
Victoria	6,916	8,002	8,426	Queensland	289	109	94
Queensland	3,050	2,961	2,424	Western Australia	6	19	24
Western Australia	2,470	2,301	1,718	New South Wales	58	6	9
South Australia	586	499	264	Northern Territory	-	-	8
TOTAL	23,254	23,527	21,772	Other	102	65	97
				TOTAL	1,004	944	1,027

Fresh Kiwifruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New Zealand	16,445	17,182	15,354	Germany	480	594	506
Italy	6,785	6,302	6,306	Malaysia	44	41	170
US	24	-	70	Qatar	6	18	66
France	-	42	42	UK	44	89	60
Other	-	< 0.5	-	Hong Kong	214	32	57
TOTAL	23,254	23,527	21,772	Other	216	169	168
				TOTAL	1,004	944	1,027

Source: GTA





Fresh Lychees Overview

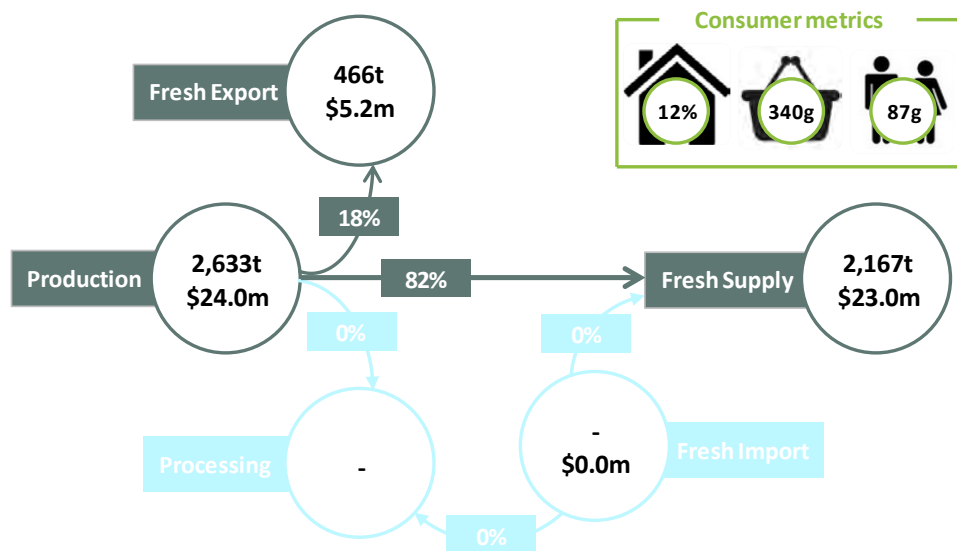
Lychee production occurs predominantly in Queensland, during the summer months.

For the year ending June 2018:

- **2,633 t** was produced.
- The value of production was **\$24.0 m** while the wholesale value of the fresh supply was **\$23.0 m**.
- **12%** of Australian households purchased fresh lychees, buying an average of **340 g** per shopping trip.
- The supply per capita was **87 g**, based on the volume supplied.



Fresh Lychees Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,700	2,419	-10%	2,633	+9%
Production (\$m)	\$ 27.8	\$ 26.7	-4%	\$ 24.0	-10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	440	411	-6%	466	+13%
Fresh Export Value (\$m)	\$ 5.5	\$ 5.6	<1%	\$ 5.2	-7%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	2,260	2,007	-11%	2,167	+8%
Fresh Supply Wholesale Value (\$m)	\$ 27.1	\$ 25.9	-5%	\$ 23.0	-11%
Supply per Capita (kg)	0.09	0.08	-13%	0.09	+6%

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

Major Lychee Production Areas

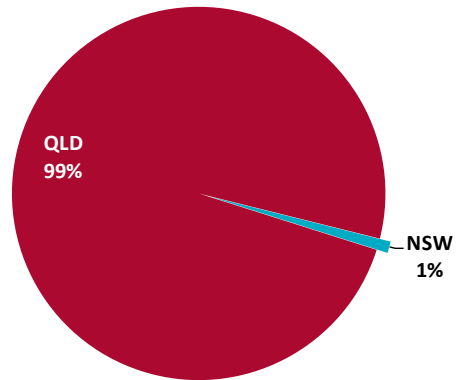
Lychee production occurs predominantly in Queensland. Major growing regions include **Atherton**, **Rockhampton**, **Bundaberg** and the **Sunshine Coast** in Queensland.



Source: ALGA



2017/18 Fresh Lychees Production by State



Source: ALGA

Fresh Lychee Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	26												
Queensland	2,607												
Availability legend			High		Medium		Low						

Source: ALGA



Fresh Mangoes Overview

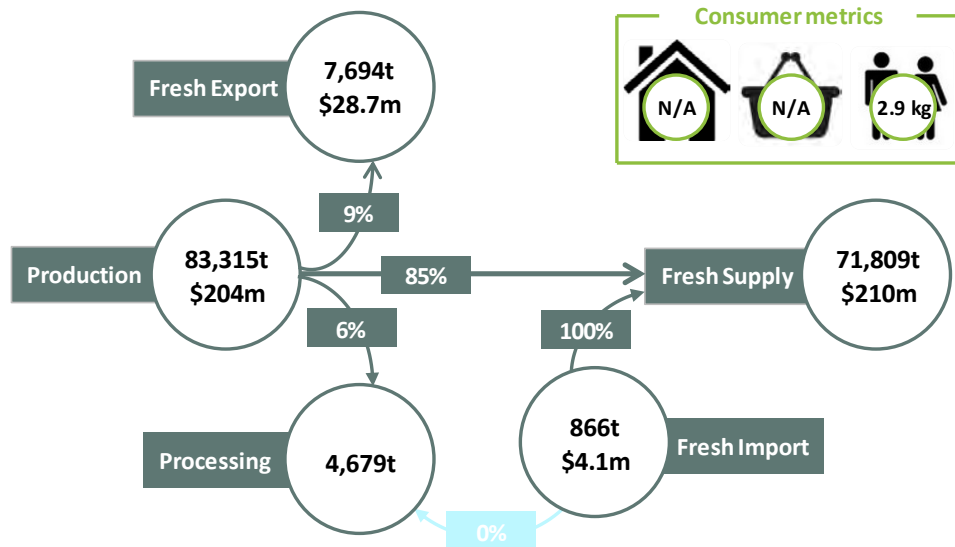
As a tropical fruit, mango production predominantly occurs in the North of Australia, Particularly in Queensland and the Northern Territory.

For the year ending June 2018:

- **83,315 t** was produced.
- The value of production was **\$204.3 m** while the wholesale value of the fresh supply was **\$209.8 m**.
- The supply per capita was **2.9 kg**, based on the volume supplied.



Fresh Mangoes Supply Chain—Year Ending June 2018



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

Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	63,791	61,474	-4%	83,315	+36%
Production (\$m)	\$ 210.3	\$ 195.7	-7%	\$ 204.3	+4%
Producing Trees (000 Trees)	1,217	1,178	-3%	-	-
Fresh Export Volume (t)	7,006	7,120	+2%	7,694	+8%
Fresh Export Value (\$m)	\$ 30.9	\$ 29.7	-4%	\$ 28.7	-3%
Fresh Import Volume (t)	887	1,111	+25%	866	-22%
Fresh Import Value (\$m)	\$ 5.1	\$ 5.7	+12%	\$ 4.1	-28%
Fresh Supply (t)	53,880	52,017	-3%	71,809	+38%
Fresh Supply Wholesale Value (\$m)	\$ 214.9	\$ 200.6	-7%	\$ 209.8	+5%
Supply per Capita (kg)	2.23	2.12	-5%	2.88	+36%

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

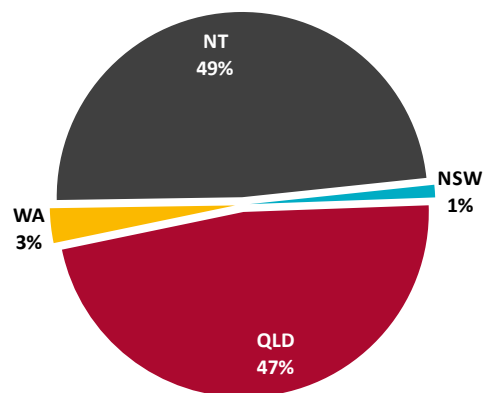
Major Mango Production Areas

Mangoes are predominantly produced in the northern Australian states. The major producing areas include **Darwin** and **Katherine** in the Northern Territory; **Mareeba**, **Bowen** and **Bundaberg** in Queensland. It is also produced in **Kununurra**, Western Australia with small volumes coming from Victoria and New South Wales.



Source: AMIA

2017/18 Fresh Mangoes Production by State



Source: AMIA

Fresh Mangoes Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	904												
Queensland	39,158												
Western Australia	2,499												
Northern Territory	40,202												
Availability legend			High		Medium		Low						None

Source: AMIA

Main Mango Varieties

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

Kensington Pride, also known as KP, is the most common mango variety in Australia, and accounted for **41%** of fresh production.

Calypso, a mango with yellowy orange skin with a deep pink blush, accounted for **29%** of fresh production.

R2E2 mangoes accounted for **14%** of fresh production.

Honey Gold mangoes accounted for **7%** of fresh production.

Other mangoes, such as Keitt, Tommy Atkins, Palmer and Nam Dok Mai, accounted for **3%** of fresh production.

Seasonality by Mango Variety

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

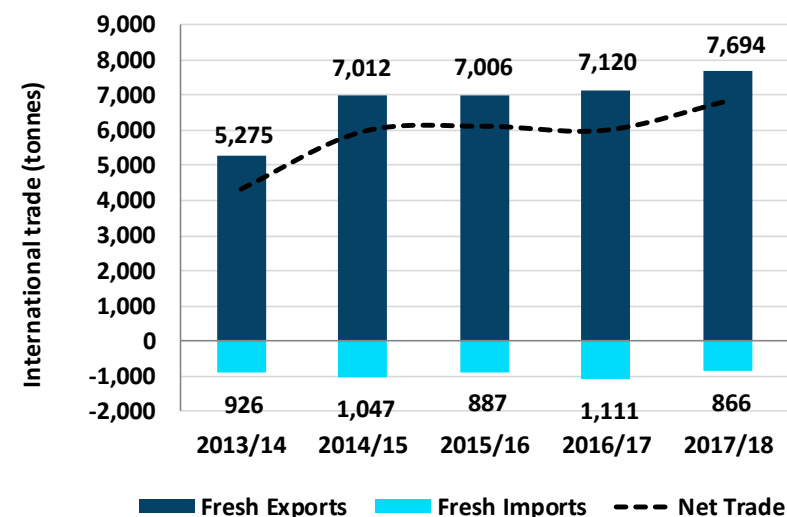
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Kensington Pride	33,933												
Calypso	24,001												
R2E2	11,587												
Honey gold	5,793												
Other	2,770												
Processing	4,679												
Availability legend			High		Medium		Low						None

Source: AMIA

Fresh Mangoes International Trade

Australia is a net exporter of fresh mangoes, with exports growing in recent years. For the year ending June 2018, Australia exported **7,694 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

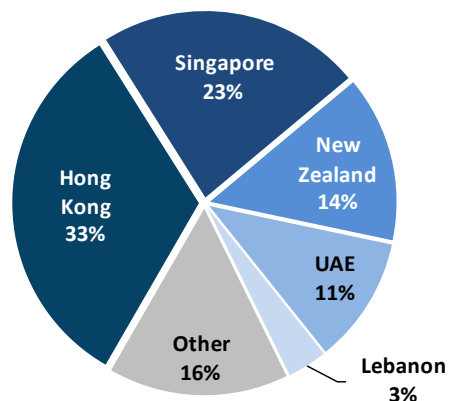
Net Fresh Mangoes International Trade



Source: GTA

For the year ending June 2018, **33%** of exported fresh mangoes were sent to Hong Kong, as profiled in the chart below.

2017/18 Fresh Mangoes Exports by Country



Source: GTA

Fresh Mangoes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Victoria	170	337	377	Queensland	5,465	5,327	5,583
New South Wales	507	518	283	Northern Territory	690	731	1,300
Western Australia	154	214	189	New South Wales	273	461	420
Queensland	52	42	16	Victoria	351	466	298
South Australia	5	1	1	Western Australia	3	39	78
Other	-	< 0.5	< 0.5	Other	224	96	14
TOTAL	887	1,111	866	TOTAL	7,006	7,120	7,694

Fresh Mangoes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Thailand	237	342	351	Hong Kong	3,010	3,328	2,518
Mexico	420	403	224	Singapore	869	1,127	1,759
India	12	84	135	New Zealand	834	828	1,107
Vietnam	38	113	78	UAE	805	756	844
Pakistan	11	37	38	Lebanon	423	244	266
Other	170	132	39	Other	1,064	837	1,200
TOTAL	887	1,111	866	TOTAL	7,006	7,120	7,694





Fresh Melons Overview

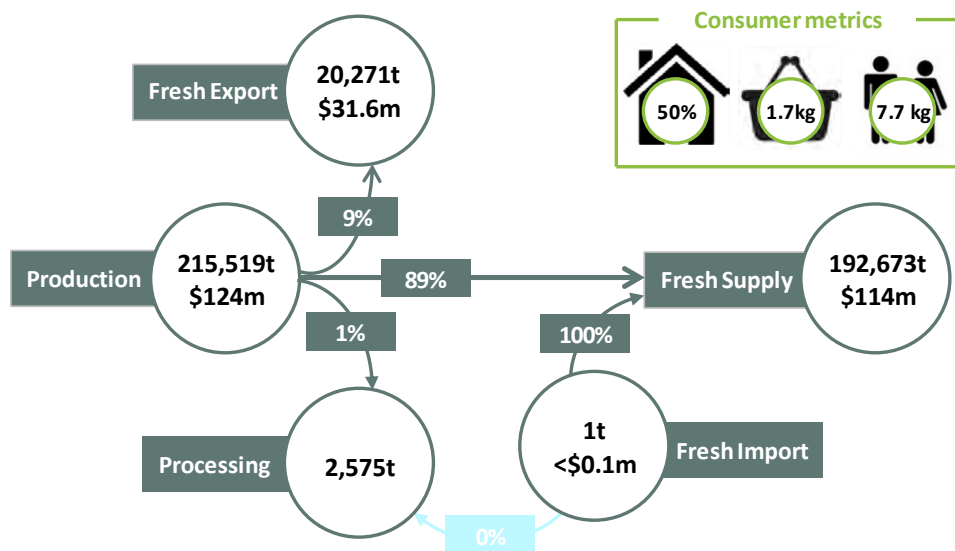
Pages 142-143 profile total melon fruit production and trade. It combines information on watermelons and muskmelons. The following pages profile each melon category in more detail.

For the year ending June 2018:

- **215,519 t** was produced.
- The value of production was **\$124.2 m** while the wholesale value of the fresh supply was **\$114.4 m**.
- **50%** of Australian households purchased fresh melons, buying an average of **1.7 kg** per shopping trip.
- The supply per capita was **7.73 kg**, based on the volume supplied.



Fresh Melons Supply Chain—Year Ending June 2018



Sources: AC; Australian Melon Association (AMA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



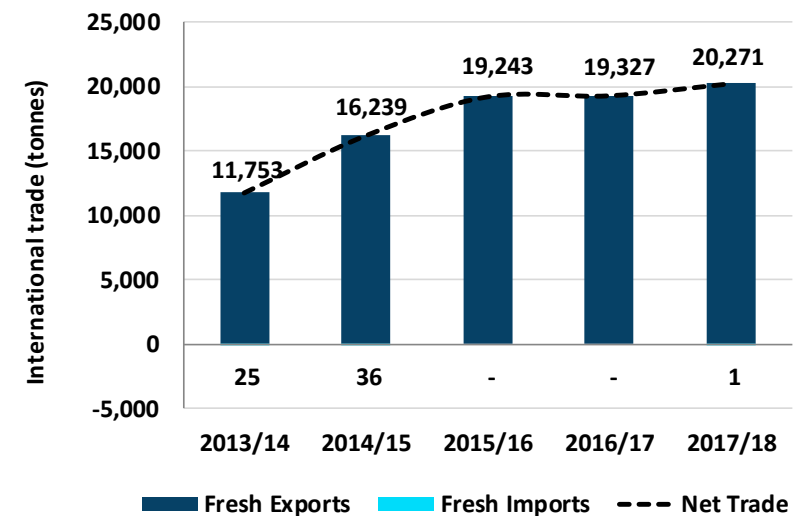
Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	225,727	231,146	+2%	215,519	-7%
Production (\$m)	\$ 165.8	\$ 172.4	+4%	\$ 124.2	-28%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	19,243	19,327	<1%	20,271	+5%
Fresh Export Value (\$m)	\$ 31.0	\$ 31.9	+3%	\$ 31.6	>-1%
Fresh Import Volume (t)	-	-	-	1	-
Fresh Import Value (\$m)	\$ -	\$ -	-	< \$0.1	-
Fresh Supply (t)	203,599	208,880	+3%	192,673	-8%
Fresh Supply Wholesale Value (\$m)	\$ 163.8	\$ 170.8	+4%	\$ 114.4	-33%
Supply per Capita (kg)	8.44	8.52	<1%	7.73	-9%

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

Fresh Melons International Trade

Australia is a net melon exporter. For the year ending June 2018 Australia exported **20,271 tonnes** of fresh melons, as profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Melons International Trade



Source: GTA

Fresh Muskmelons Overview

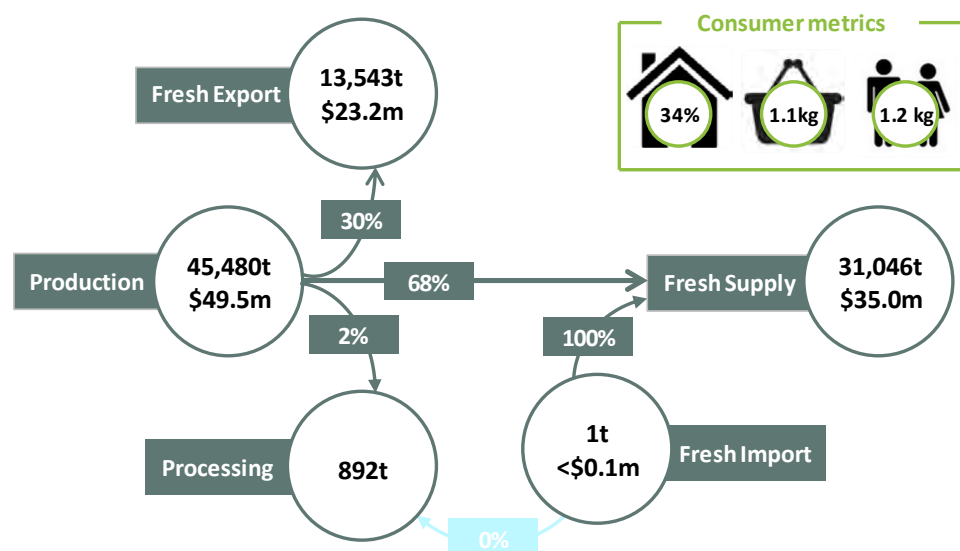
Muskmelons include **rockmelons** and **honey dew melons**. Production occurs across most states of Australia.

For the year ending June 2018:

- **45,480 t** was produced.
- The value of production was **\$49.5 m** while the wholesale value of the fresh supply was **\$35.0 m**.
- **34%** of Australian households purchased fresh muskmelons, buying an average of **1.1 kg** per shopping trip.
- The supply per capita was **1.2kg**, based on the volume supplied.



Fresh Muskmelons Supply Chain—Year Ending June 2018



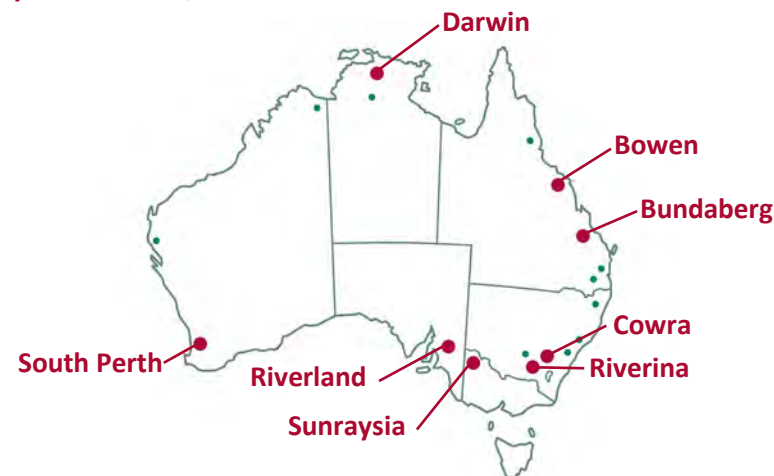
Sources: AC; Australian Melon Association (AMA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	66,932	67,020	<1%	45,480	-32%
Production (\$m)	\$ 70.7	\$ 76.1	+8%	\$ 49.5	-35%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	13,790	13,211	-4%	13,543	+3%
Fresh Export Value (\$m)	\$ 24.0	\$ 23.4	-3%	\$ 23.2	>-1%
Fresh Import Volume (t)	-	-	-	1	-
Fresh Import Value (\$m)	\$ -	\$ -	-	< \$0.1	-
Fresh Supply (t)	51,829	52,495	+1%	31,046	-41%
Fresh Supply Wholesale Value (\$m)	\$ 59.1	\$ 66.0	+12%	\$ 35.0	-47%
Supply per Capita (kg)	2.15	2.14	>-1%	1.25	-42%

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

Major Muskmelon Production Areas

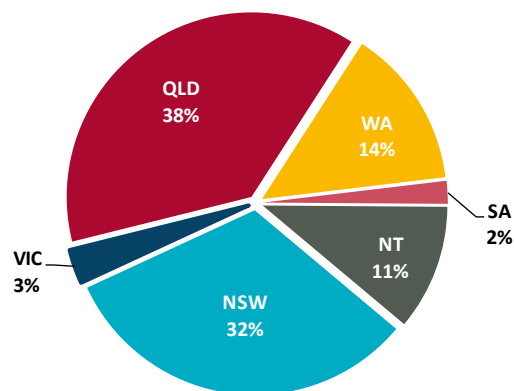
Muskmelons are grown across most states in Australia, with the majority produced in the northern Australian states. The major producing areas include **Bowen** and **Bundaberg** in Queensland; the **Darwin region** the Northern Territory; **Cowra** and **Riverina** in New South Wales; the **Riverland region** of South Australia; and **Sunraysia** in Victoria; and **South Perth** in Western Australia.



Source: AMA



2017/18 Fresh Muskmelons Production by State



Sources: AMA

Fresh Muskmelons Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	14,554												
Victoria	1,364												
Queensland	17,282												
Western Australia	6,367												
South Australia	910												
Northern Territory	5,003												
Availability legend			High		Medium		Low						

Source: AMA

Main Muskmelon Varieties

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

Rockmelons, a round melon with netted greyish-green skin and an orange flesh. Rockmelons accounted for **85%** of fresh production for the year ending June 2018.

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

Other muskmelon varieties include the newly introduced **Piel de Sapo** variety.



Seasonality by Muskmelon Variety

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

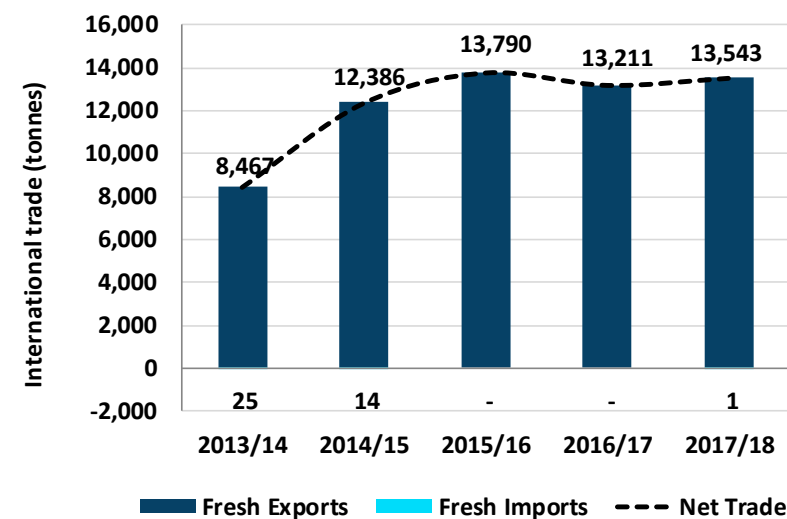
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	38,658												
Honeydew	6,367												
Piel de Sapo	455												
Availability legend			High		Medium		Low						

Source: AMA

Fresh Muskmelons International Trade

Australia is a net exporter of fresh muskmelons, typically exporting between 8,000-14,000 tonnes per year. For the year ending June 2018, Australia exported **13,543 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Muskmelons International Trade

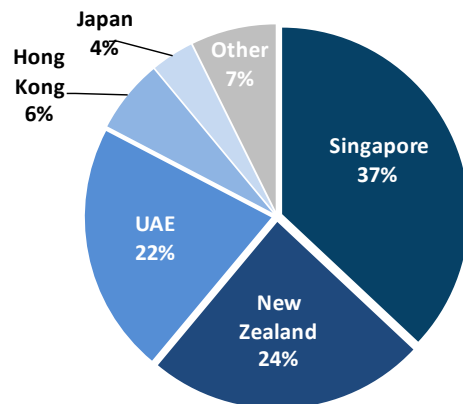


Source: GTA



For the year ending June 2018, **37%** of exported fresh muskmelons were sent to Singapore, as profiled in the chart below.

2017/18 Fresh Muskmelons Exports by State



Source: GTA

Fresh Muskmelons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Queensland	-	-	1	Queensland	7,432	7,624	7,663
TOTAL	-	-	1	Western Australia	2,335	1,836	2,564
				New South Wales	1,717	2,248	2,562
				Victoria	1,343	578	414
				South Australia	295	62	179
				Other	668	863	161
				TOTAL	13,790	13,211	13,543

Fresh Muskmelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New Zealand	-	-	1	Singapore	4,795	5,442	5,010
TOTAL	-	-	1	New Zealand	3,011	3,005	3,259
				UAE	3,744	2,475	2,928
				Hong Kong	1,259	1,171	857
				Japan	-	165	498
				Other	982	952	992
				TOTAL	13,790	13,211	13,543

Source: GTA





Fresh Watermelons

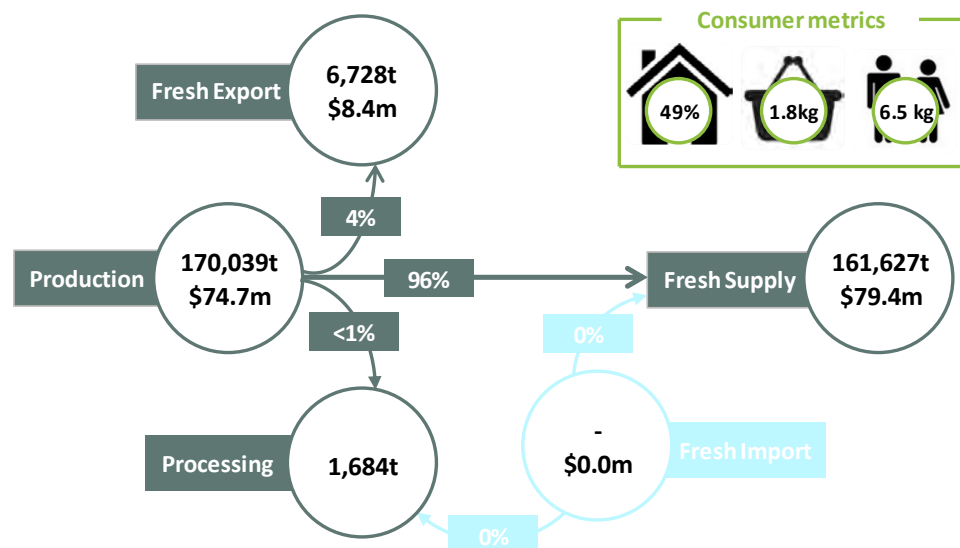
Overview

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

For the year ending June 2018:

- **170,039 t** was produced.
- The value of production was **\$74.7 m** while the wholesale value of the fresh supply was **\$79.4 m**.
- **49%** of Australian households purchased fresh watermelons, buying an average of **1.8 kg** per shopping trip.
- The supply per capita was **6.5 kg**, based on the volume supplied.

Fresh Watermelons Supply Chain—Year Ending June 2018



Sources: AC; Australian Melon Association (AMA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	158,795	164,126	+3%	170,039	+4%
Production (\$m)	\$ 95.1	\$ 96.4	+1%	\$ 74.7	-22%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5,453	6,116	+12%	6,728	+10%
Fresh Export Value (\$m)	\$ 7.0	\$ 8.5	+21%	\$ 8.4	>-1%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	151,770	156,385	+3%	161,627	+3%
Fresh Supply Wholesale Value (\$m)	\$ 104.7	\$ 104.8	<1%	\$ 79.4	-24%
Supply per Capita (kg)	6.29	6.38	+1%	6.48	+2%

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

Major Watermelon Production Areas

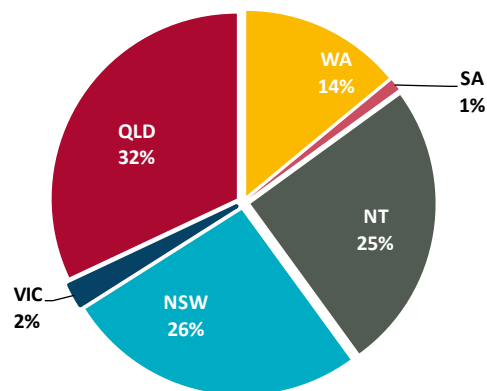
Watermelons are grown across most states in Australia, with the majority produced in the northern Australian states. The major producing areas include **Bundaberg**, **Bowen**, and **Chinchilla** in Queensland; **Darwin** and **Katherine** in Northern Territory; **Riverina** and **Cowra** in New South Wales; and **Kununarra** in Western Australia.



Source: AMA



2017/18 Fresh Watermelons Production by State



Source: AMA

Fresh Watermelons Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	44,210												
Victoria	3,401												
Queensland	54,412												
Western Australia	23,805												
South Australia	1,700												
Northern Territory	42,510												
Availability legend		High		Medium		Low							

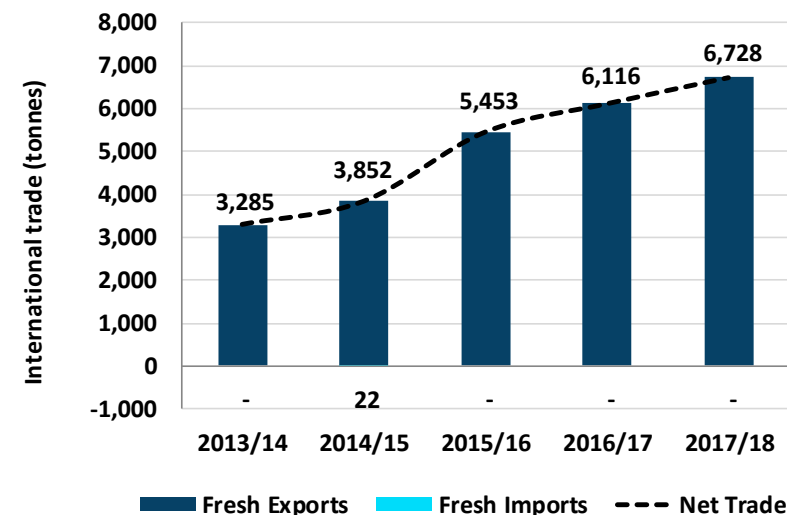
Source: AMA

Fresh Watermelons International Trade

Australia is a net exporter of fresh watermelons, with exports growing in recent years. For the year ending June 2018, Australia exported **6,728** tonnes. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



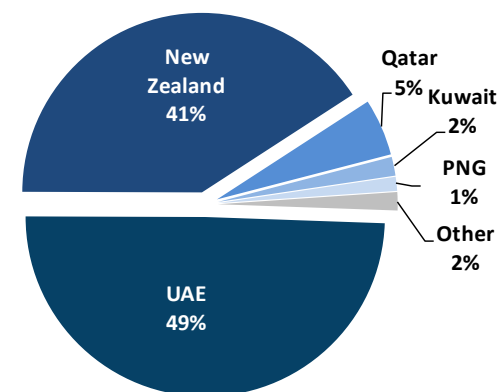
Net Fresh Watermelons International Trade



Source: GTA

For the year ending June 2018, **49%** of exported fresh watermelons were sent to United Arab Emirates, as profiled in the chart below.

2017/18 Fresh Watermelons Exports by Country



Source: GTA



Fresh Watermelons Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018
Queensland	4,442	4,603	4,782
New South Wales	108	328	848
Victoria	412	423	484
Northern Territory	12	104	330
Western Australia	26	366	278
Other	453	291	6
TOTAL	5,453	6,116	6,728

Fresh Watermelons Imports and Exports by Country

Exports by country (Tonnes)			
Year Ending June	2016	2017	2018
UAE	2,550	2,957	3,330
New Zealand	2,385	2,513	2,744
Qatar	136	269	345
Kuwait	151	141	114
PNG	67	78	85
Other	164	158	111
TOTAL	5,453	6,116	6,728

Source: GTA



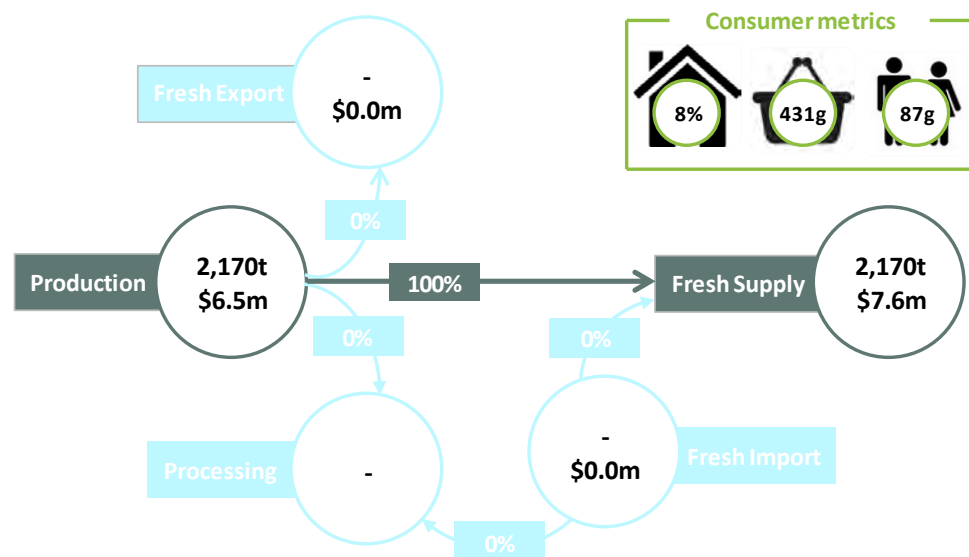
Fresh Nashi Overview

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

For the year ending June 2018:

- **2,170 t** was produced.
- The value of production was **\$6.5 m** while the wholesale value of the fresh supply was **\$7.6 m**.
- **8%** of Australian households purchased fresh nashi, buying an average of **431 g** per shopping trip.
- The supply per capita was **87 g**, based on the volume supplied.

Fresh Nashi Supply Chain—Year Ending June 2018



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

Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,750	1,552	-11%	2,170	+40%
Production (\$m)	\$ 4.8	\$ 4.6	-5%	\$ 6.5	+40%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,750	1,552	-11%	2,170	+40%
Fresh Supply Wholesale Value (\$m)	\$ 5.7	\$ 5.4	-5%	\$ 7.6	+40%
Supply per Capita (kg)	0.07	0.06	-13%	0.09	+37%

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

**Note: Production volume has been modified from the quoted volumes published in the previous edition of the handbook (2016/17 edition).*

Major Nashi Production Areas

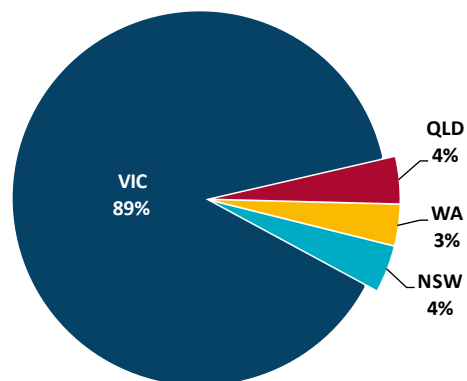
Nashi production occurs predominantly in the **Goulburn Valley** region of Victoria.



Source: ANGA



2017/18 Fresh Nashi Production by State



Source: ANGA

Fresh Nashi Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	87												
Victoria	1,920												
Queensland	87												
Western Australia	76												
Availability legend		High		Medium		Low		None					

Source: ANGA





Fresh Passionfruit Overview

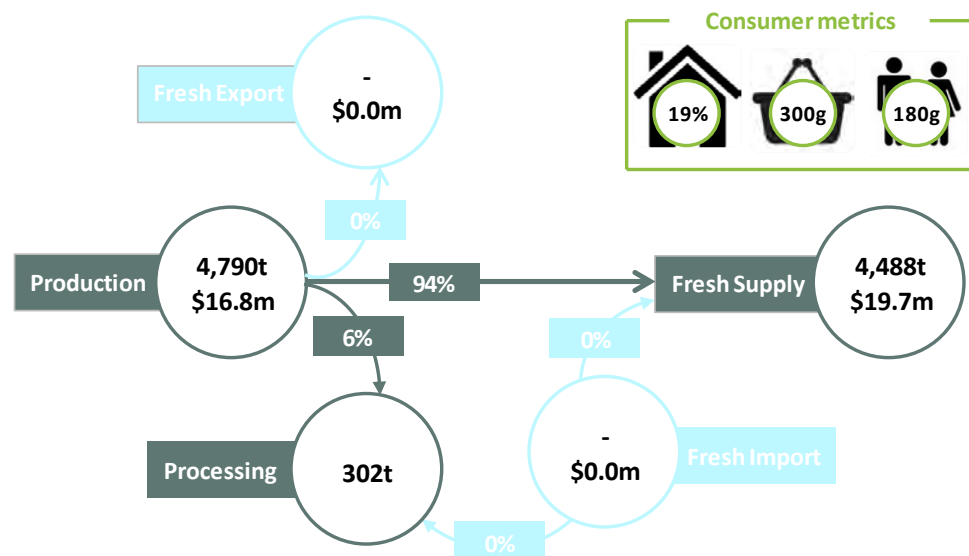
Passionfruit is grown in the north of Australia, with the majority grown in Queensland. The majority of Australian production is destined for the fresh market.

For the year ending June 2018:

- **4,790 t** was produced.
- The value of production was **\$16.8 m** while the wholesale value of the fresh supply was **\$19.7 m**.
- **19%** of Australian households purchased fresh passionfruit, buying an average of **300 g** per shopping trip.
- The supply per capita was **180 g**, based on the volume supplied.



Fresh Passionfruit Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	5,196	5,004	-4%	4,790	-4%
Production (\$m)	\$ 17.2	\$ 19.0	+11%	\$ 16.8	-12%
Producing Vines (000 Vines)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	4,868	4,688	-4%	4,488	-4%
Fresh Supply Wholesale Value (\$m)	\$ 20.1	\$ 22.3	+11%	\$ 19.7	-12%
Supply per Capita (kg)	0.20	0.19	-5%	0.18	-6%

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

Major Passionfruit Production Areas

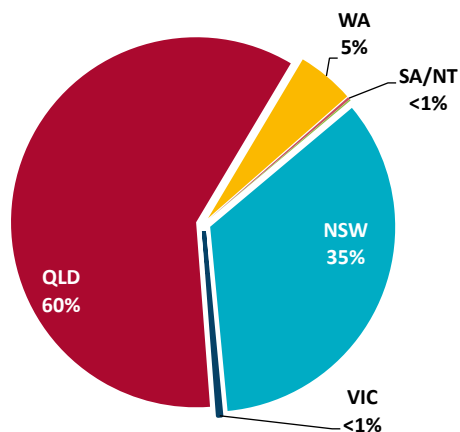
Passionfruit production occurs in the north of Australia. Major production areas include the **Wide Bay** region, **Cooktown**, **Daintree** and **Mareeba** in Far North Queensland and the **Sunshine Coast** in South East Queensland, and **Tweed Valley** in the north of New South Wales.



Source: PAI



2017/18 Fresh Passionfruit Production by State



Source: PAI

Fresh Passionfruit Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,660												
Victoria	14												
Queensland	2,866												
Western Australia	240												
SA/NT	11												
Availability legend		High		Medium		Low		None					

Source: PAI



Photo credit: James Stretch 2016



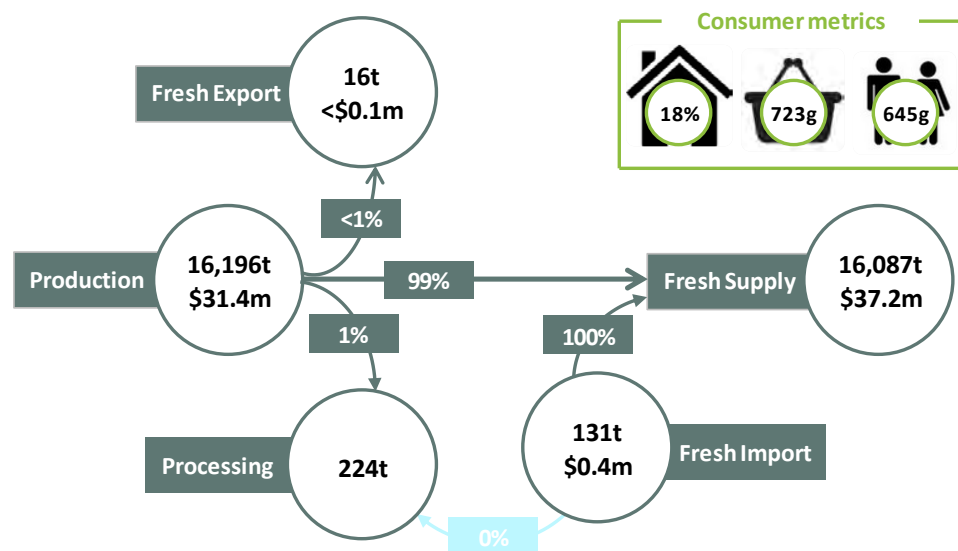
Fresh Papaya/Pawpaw Overview

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

For the year ending June 2018:

- **16,196 t** was produced.
- The value of production was **\$31.4 m** while the wholesale value of the fresh supply was **\$37.2m**.
- **18%** of Australian households purchased fresh red papaya and yellow pawpaw, buying an average of **723 g** per shopping trip.
- The supply per capita was **645 g**, based on the volume supplied.

Fresh Papaya/Pawpaw Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	16,729	18,381	+10%	16,196	-12%
Production (\$m)	\$ 28.4	\$ 31.6	+11%	\$ 31.4	>-1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	89	57	-35%	16	-72%
Fresh Export Value (\$m)	\$ 0.2	\$ 0.2	-16%	<\$0.1	-73%
Fresh Import Volume (t)	106	61	-43%	131	>100%
Fresh Import Value (\$m)	\$ 0.3	\$ 0.2	-47%	\$ 0.4	>100%
Fresh Supply (t)	16,516	18,130	+10%	16,087	-11%
Fresh Supply Wholesale Value (\$m)	\$ 33.4	\$ 37.1	+11%	\$ 37.2	<1%
Supply per Capita (kg)	0.69	0.74	+8%	0.65	-13%

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

Major Papaya/Pawpaw Production Areas

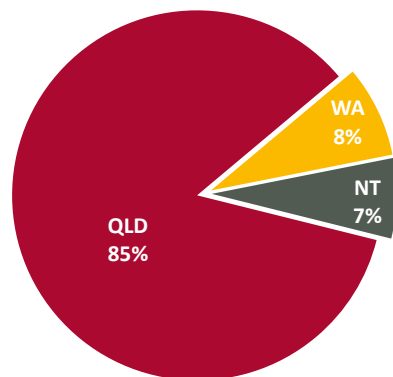
Red papaya and yellow pawpaw are predominantly produced in the northern Australian states. Major producing areas are **Mareeba** and **Tully** in Queensland.



Source: PA



2017/18 Fresh Papaya/Pawpaw Production by State



Source: PA

Fresh Papaya/Pawpaw Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	13,766												
Western Australia	1,296												
Northern Territory	1,134												
Imported	131												
Availability legend		High		Medium		Low		None					

Source: PA

Main Categories

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

Red papaya accounted for **65%** of fresh production.

Yellow pawpaw accounted for **35%** of fresh production.

Seasonality by category

Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Papaya	10,527												
Pawpaw	5,669												
Availability legend		High		Medium		Low		None					

Source: PA

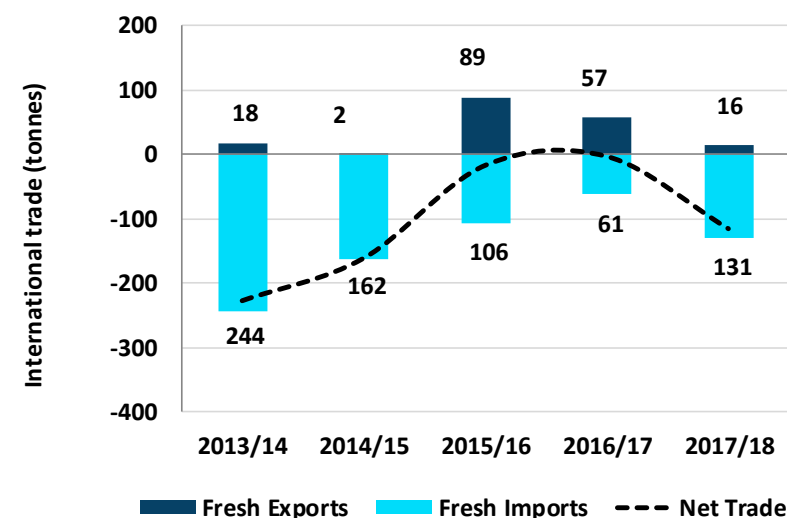


Fresh Papaya/Pawpaw International Trade

Australia is a net importer of fresh red papaya and yellow pawpaw, typically importing between 100-300 tonnes per year. For the year ending June 2018, Australia imported **131 tonnes**.

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

Net Fresh Papaya/Pawpaw International Trade

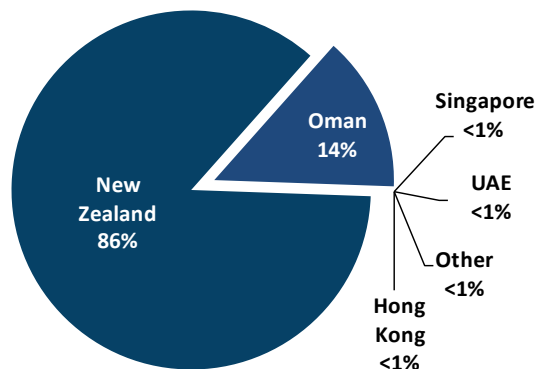


Source: GTA



For the year ending June 2018, **86%** of exported fresh red papaya and yellow pawpaw were sent to New Zealand, as profiled in the chart below.

2017/18 Fresh Papaya/Pawpaw Exports by Country



Source: GTA

Papaya/Pawpaw Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Victoria	89	54	128	Queensland	89	57	16
New South Wales	17	7	3	New South Wales	-	< 0.5	< 0.5
Other	-	-	< 0.5	Victoria	-	< 0.5	< 0.5
TOTAL	106	61	131	Tasmania	< 0.5	< 0.5	-
				Other	< 0.5	1	< 0.5
				TOTAL	89	57	16

Papaya/Pawpaw Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Fiji	106	61	103	New Zealand	87	-	13
Thailand	-	-	28	Oman	-	-	2
TOTAL	106	61	131	Hong Kong	1	1	< 0.5
				Singapore	< 0.5	4	< 0.5
				UAE	-	53	< 0.5
				Other	< 0.5	< 0.5	< 0.5
				TOTAL	89	57	16

Source: GTA





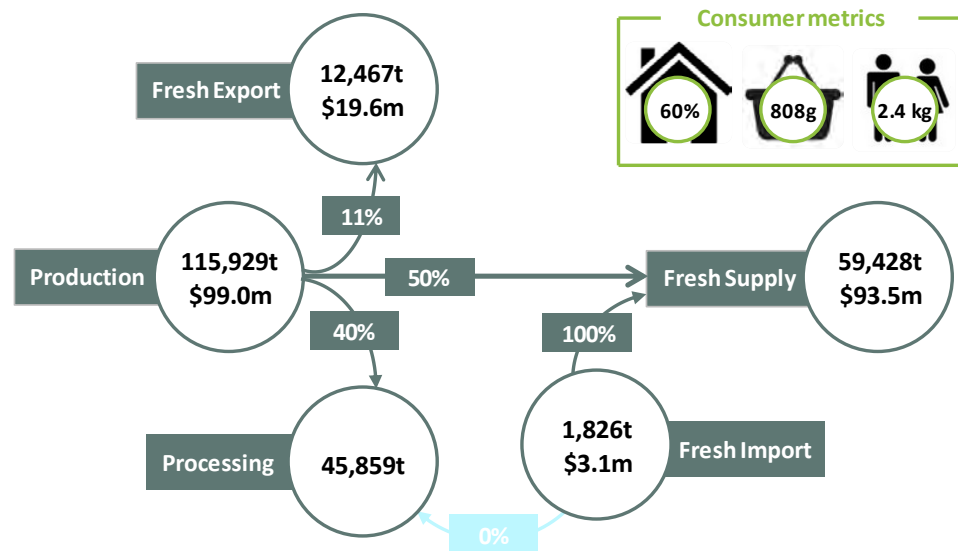
Fresh Pears Overview

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

For the year ending June 2018:

- **115,929 t** was produced with **40%** sent to be processed.
- The value of production was **\$99.0 m** while the wholesale value of the fresh supply was **\$93.5 m**.
- **60%** of Australian households purchased fresh pears, buying an average of **808 g** per shopping trip.
- The supply per capita was **2.4 kg**, based on the volume supplied.

Fresh Pears Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	117,677	108,065	-8%	115,929	+7%
Production (\$m)	\$ 116.4	\$ 122.9	+6%	\$ 99.0	-19%
Producing Trees (000 Trees)	1,441	1,465	+2%	-	-
Fresh Export Volume (t)	12,260	7,131	-42%	12,467	+75%
Fresh Export Value (\$m)	\$ 21.7	\$ 12.2	-44%	\$ 19.6	+60%
Fresh Import Volume (t)	1,487	2,158	+45%	1,826	-15%
Fresh Import Value (\$m)	\$ 2.6	\$ 3.4	+33%	\$ 3.1	-9%
Fresh Supply (t)	58,762	58,595	>-1%	59,428	+1%
Fresh Supply Wholesale Value (\$m)	\$ 110.0	\$ 128.5	+17%	\$ 93.5	-27%
Supply per Capita (kg)	2.44	2.39	-2%	2.38	>-1%

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

Major Pears Production Areas

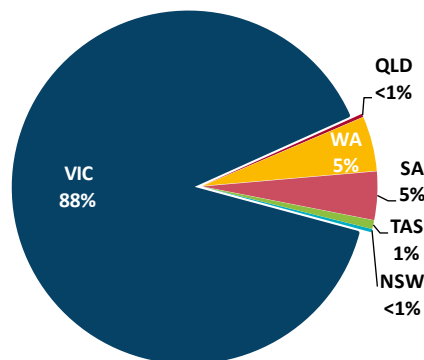
Pears are produced across Australia, although the majority of production occurs in Victoria around **Goulburn Valley**, **Yarra Valley** and **Gippsland**. Other growing areas also include **Stanthorpe** in Queensland; **Batlow** in New South Wales; the **Huon Valley** in Tasmania; **Adelaide Hills** in South Australia; and **Manjimup** in Western Australia.



Source: APAL



2017/18 Fresh Pears Production by State



Source: APAL

Fresh Pears Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	354												
Victoria	103,252												
Queensland	342												
Western Australia	5,875												
South Australia	5,181												
Tasmania	924												
Imported	1,826												
Availability legend			High		Medium		Low						

Source: APAL

Main Pear varieties

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

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

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

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



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

Seasonality by Pear Variety

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

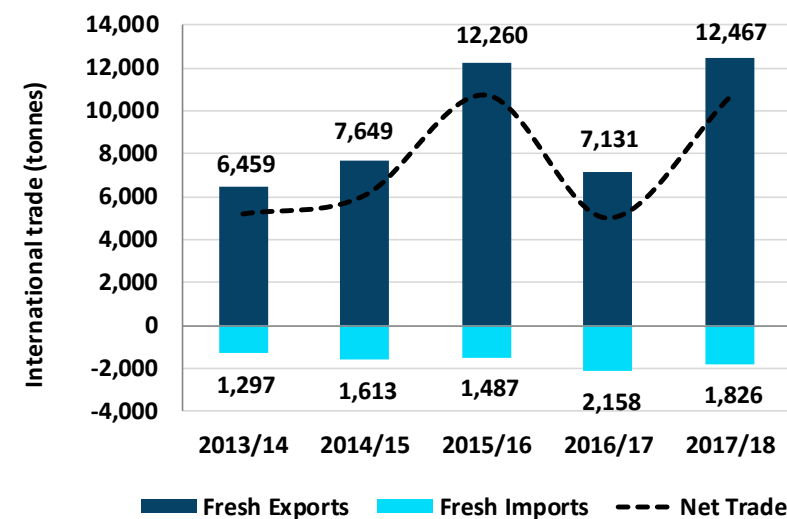
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	44,144												
William	13,664												
Beurre Bosc	7,007												
Corella	701												
Others	4,204												
Processed	45,859												
Availability legend			High		Medium		Low						

Source: APAL

Fresh Pears International Trade

For the year ending June 2018, Australia exported **12,467 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Pears International Trade

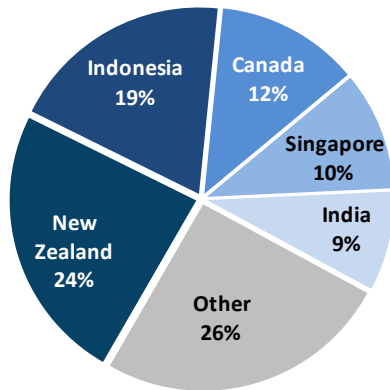


Source: GTA



For the year ending June 2018, **24%** of exported fresh pears were sent to New Zealand, as profiled in the chart below.

2017/18 Fresh Pears Exports by Country



Source: GTA

Fresh Pears Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	769	973	890	Victoria	11,589	6,474	11,588
Victoria	628	964	771	Queensland	393	317	468
Queensland	90	222	165	New South Wales	154	202	292
TOTAL	1,487	2,158	1,826	Western Australia	93	65	27
				South Australia	< 0.5	6	1
				Other	31	68	92
				TOTAL	12,260	7,131	12,467

Fresh Pears Imports and Exports by Country

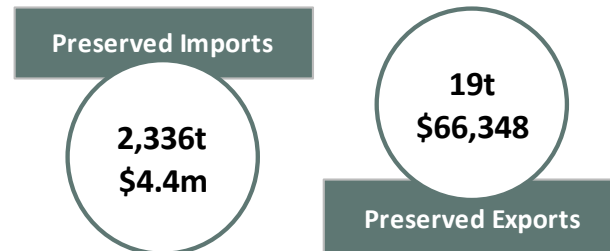
Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
China	1,374	1,959	1,638	New Zealand	2,985	2,205	2,989
Sth. Korea	113	200	187	Indonesia	4,700	1,757	2,406
TOTAL	1,487	2,158	1,826	Canada	998	855	1,540
				Singapore	1,018	494	1,284
				India	-	121	1,076
				Other	2,559	1,699	3,172
				TOTAL	12,260	7,131	12,467

Source: GTA



Processed Pears International Trade

For the year ending June 2018, an additional **2,336 tonnes** of preserved pears were imported, while **19 tonnes** were exported.



Source: GTA





Fresh Persimmons Overview

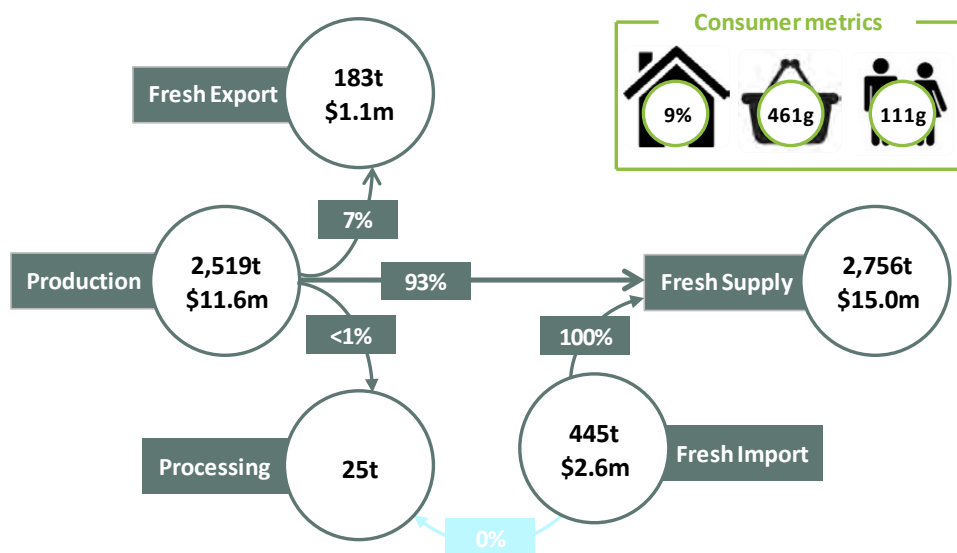
Persimmons are grown around Australia, with half of all production occurring in Queensland. There is a small export crop, but the majority of production is used in the fresh market.

For the year ending June 2018:

- **2,519 t** was produced.
- The value of production was **\$11.6 m** while the wholesale value of the fresh supply was **\$15.0 m**.
- **9%** of Australian households purchased fresh persimmons, buying an average of **461 g** per shopping trip.
- The supply per capita was **111 g**, based on the volume supplied.



Fresh Persimmons Supply Chain —Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,660	2,516	-5%	2,519	<1%
Production (\$m)	\$ 10.3	\$ 10.5	+2%	\$ 11.6	+11%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	195	143	-27%	183	+28%
Fresh Export Value (\$m)	\$ 1.0	\$ 0.7	-29%	\$ 1.1	+48%
Fresh Import Volume (t)	546	492	-10%	445	-10%
Fresh Import Value (\$m)	\$ 2.9	\$ 2.8	-4%	\$ 2.6	-9%
Fresh Supply (t)	2,932	2,827	-4%	2,756	-2%
Fresh Supply Wholesale Value (\$m)	\$ 13.5	\$ 14.1	+4%	\$ 15.0	+7%
Supply per Capita (kg)	0.12	0.12	-5%	0.11	-4%

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

Major Persimmons Production Areas

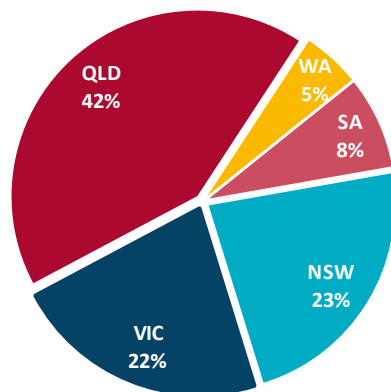
Persimmons are produced primarily in **south east Queensland**. Other major producing areas include **Sydney Basin** in New South Wales; **Sunraysia**, the **Goulburn** and **Murray valley** regions in Victoria, and **Riverland** around the South Australian and Victorian border.



Source: PAus



2017/18 Fresh Persimmons Production by State



Source: PAus

Fresh Persimmons Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	579												
Victoria	554												
Queensland	1,058												
Western Australia	126												
South Australia	202												
Imported	617												
Availability legend													
		High			Medium			Low			None		

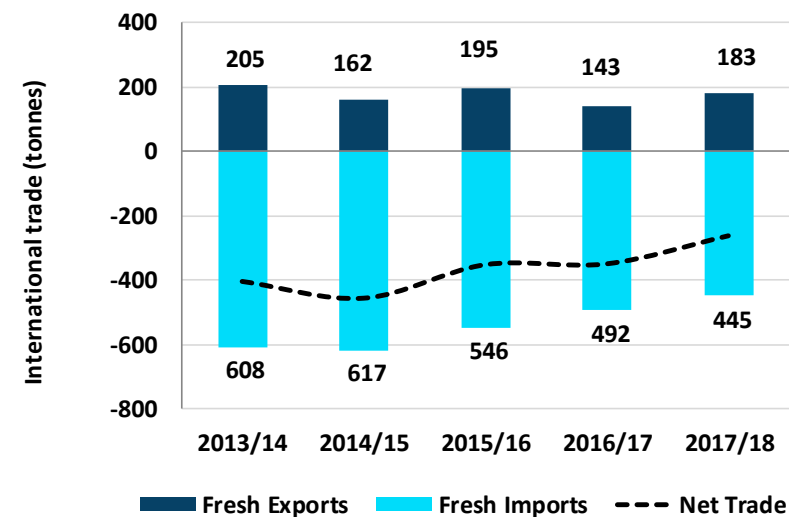
Source: PAus

Fresh Persimmons International Trade

There is a small amount of international trade of persimmons, typically with more imports than exports. For the year ending June 2018, Australia exported **183 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



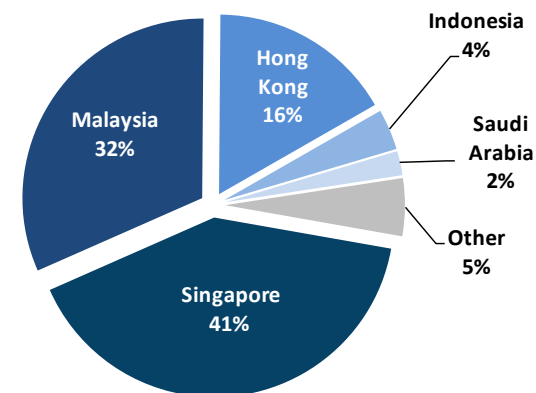
Net Fresh Persimmons International Trade



Source: GTA

For the year ending June 2018, **41%** of exported persimmons were sent to Singapore, as profiled in the chart below.

2017/18 Fresh Persimmons Exports by Country



Source: GTA



Fresh Persimmons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	297	290	290	Victoria	30	13	57
Victoria	153	120	57	Queensland	121	89	53
Western Australia	49	65	51	South Australia	38	29	31
Queensland	47	17	48	Western Australia	-	6	26
TOTAL	546	492	445	New South Wales	6	7	12
				Other	< 0.5	< 0.5	3
				TOTAL	195	143	183

Fresh Persimmons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New Zealand	544	479	408	Singapore	66	41	74
US	2	13	30	Malaysia	83	55	58
Other	< 0.5	-	7	Hong Kong	31	35	30
TOTAL	546	492	445	Indonesia	< 0.5	< 0.5	7
				Saudi Arabia	3	4	4
				Other	12	8	9
				TOTAL	195	143	183

Source: GTA





Fresh Pineapples Overview

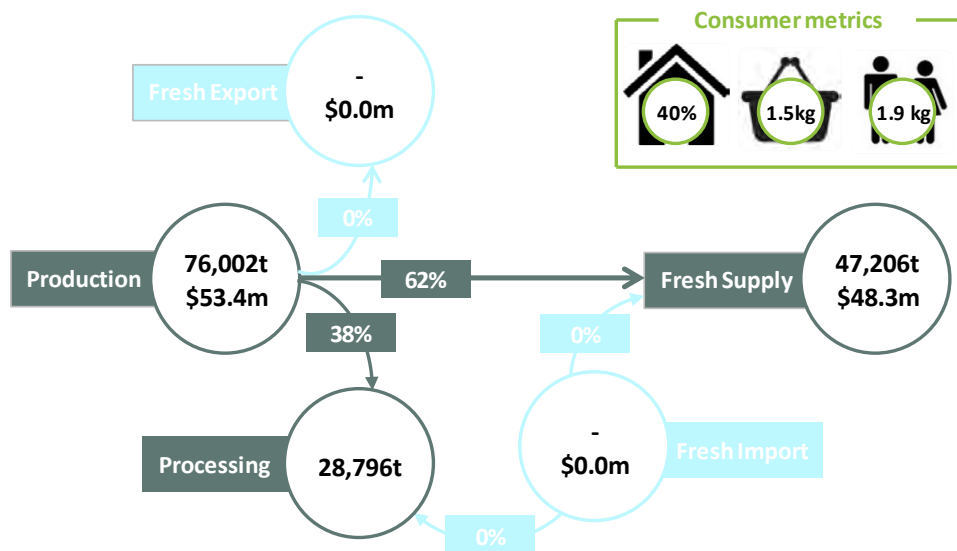
The majority of pineapple production occurs in Queensland. **38%** of pineapples grown in Australia in 2018 were sent to be processed, with the majority of this volume either tinned or juiced.

For the year ending June 2018:

- **76,002 t** was produced with **38%** sent to be processed.
- The value of production was **\$53.4 m** while the wholesale value of the fresh supply was **\$48.3 m**.
- **40%** of Australian households purchased fresh pineapples, buying an average of **1.5 kg** per shopping trip.
- The supply per capita was **1.9 kg**, based on the volume supplied.



Fresh Pineapples Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	75,376	77,482	+3%	76,002	-2%
Production (\$m)	\$ 55.0	\$ 54.2	-1%	\$ 53.4	-1%
Production area (Ha)	1,609	1,609	-	1,628	+1%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	47,486	45,897	-3%	47,206	+3%
Fresh Supply Wholesale Value (\$m)	\$ 50.7	\$ 47.7	-6%	\$ 48.3	+1%
Supply per Capita (kg)	1.97	1.87	-5%	1.89	+1%

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

Major Pineapple Production Areas

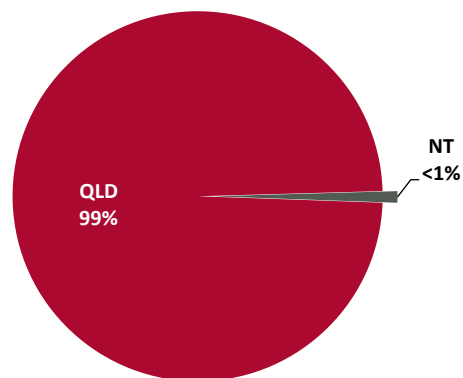
Pineapples are produced primarily in Queensland. The major producing areas include **South East Queensland** (from Beerwah to Wamuran), **Mareeba**, **Rollingstone**, **Yeppoon** and **Wide Bay** in Queensland and **Darwin** in NT.



Source: QDAF



2015/16 Fresh Pineapple Production by State



Sources: ABS; (Freshlogic Analysis)

Fresh Pineapple Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	75,242												
Northern Territory	760												
Availability legend		High		Medium		Low		None					

Source: (Freshlogic Analysis); QDAF

Processed Pineapple International Trade

For the year ending June 2018, an additional **19,495 tonnes** of preserved pineapples were imported, while **126 tonnes** were exported. Australia also imported **4,184 kilo litres** of pineapple juice, while exporting **1,600 kilo litres** of pineapple juice.



Source: GTA





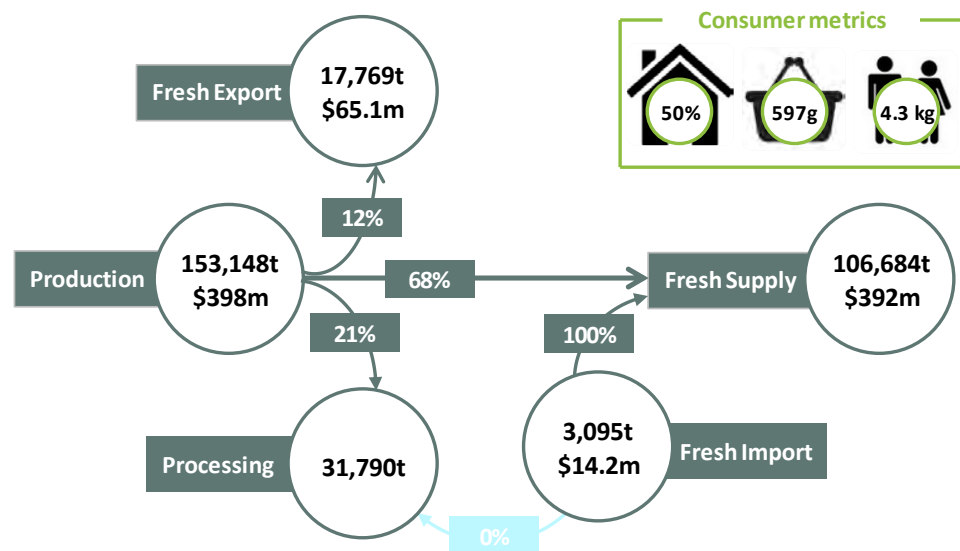
Fresh Summerfruit Overview

Pages 186-187 profile total summerfruit production and trade. They combine information on apricots, nectarines/peaches and plums. The following pages profile each summerfruit category in more detail.

For the year ending June 2018:

- **153,148 t** was produced.
- The value of production was **\$397.8 m** while the wholesale value of the fresh supply was **\$391.7 m**.
- **50%** of Australian households purchased a summerfruit, buying an average of **597 g** per shopping trip.
- The supply per capita of summerfruit was **4.3 kg**, based on the volume supplied.

Fresh Summerfruit Supply Chain—Year Ending June 2018



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



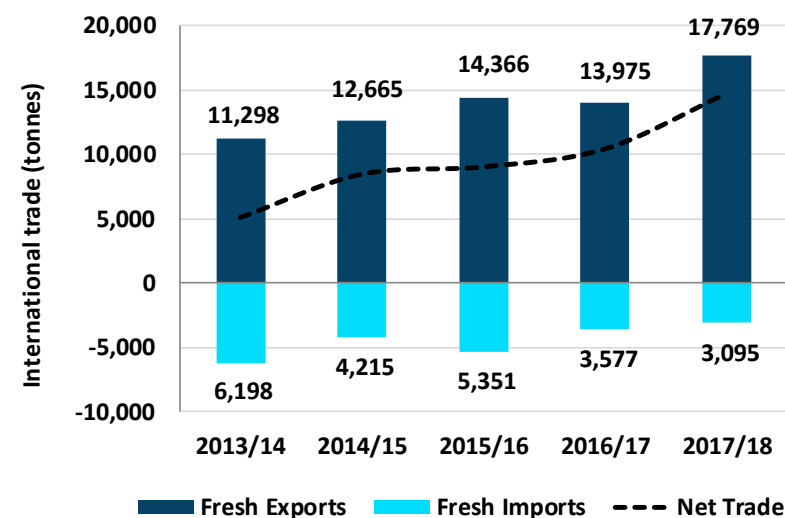
Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	144,844	136,430	-6%	153,148	+12%
Production (\$m)	\$ 376.9	\$ 394.2	+5%	\$ 397.8	<1%
Producing Trees (000 Trees)	5,488	5,645	+3%	-	-
Fresh Export Volume (t)	14,366	13,975	-3%	17,769	+27%
Fresh Export Value (\$m)	\$ 48.3	\$ 51.4	+7%	\$ 65.1	+27%
Fresh Import Volume (t)	5,351	3,577	-33%	3,095	-13%
Fresh Import Value (\$m)	\$ 24.1	\$ 15.5	-36%	\$ 14.2	-9%
Fresh Supply (t)	102,853	97,163	-6%	106,684	+10%
Fresh Supply Wholesale Value (\$m)	\$ 393.1	\$ 406.5	+3%	\$ 391.7	-4%
Supply per Capita (kg)	4.27	3.96	-7%	4.28	+8%

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

Fresh Summerfruit International Trade

Australia is a net summerfruit exporter. Imports of peaches and nectarines from the US began in the year ending June 2014. For the year ending June 2018 Australia exported **17,769 tonnes** of fresh summerfruit, as profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Summerfruit International Trade



Source: GTA



Fresh Apricots Overview

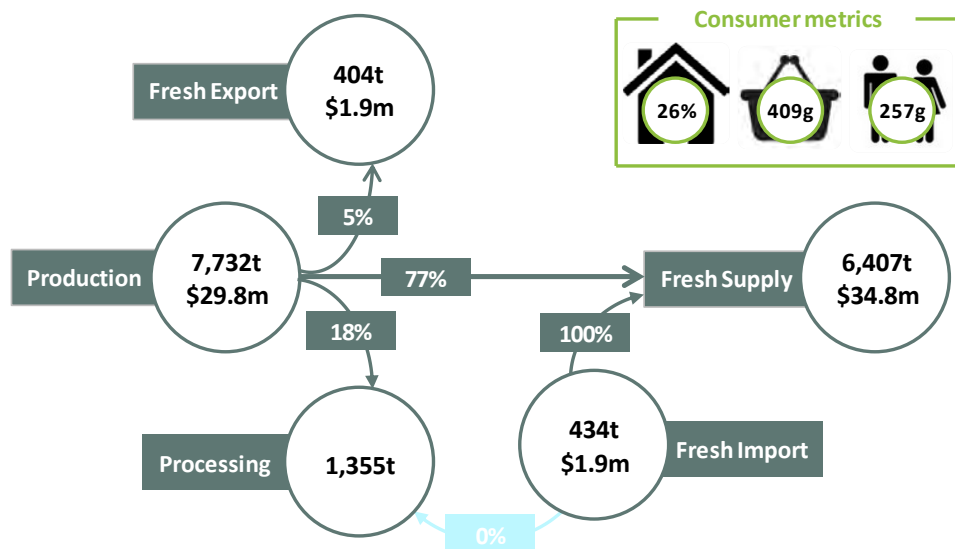
The majority of apricot production occurs in the southern states. Approximately a fifth of apricots grown in Australia are sent to be processed, either tinned or dried.

For the year ending June 2018:

- **7,732 t** was produced with **18%** sent to be processed.
- The value of production was **\$29.8 m** while the wholesale value of the fresh supply was **\$34.8 m**.
- **26%** of Australian households purchased fresh apricots, buying an average of **409 g** per shopping trip.
- The supply per capita was **257 g**, based on the volume supplied.



Fresh Apricots Supply Chain—Year Ending June 2018



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

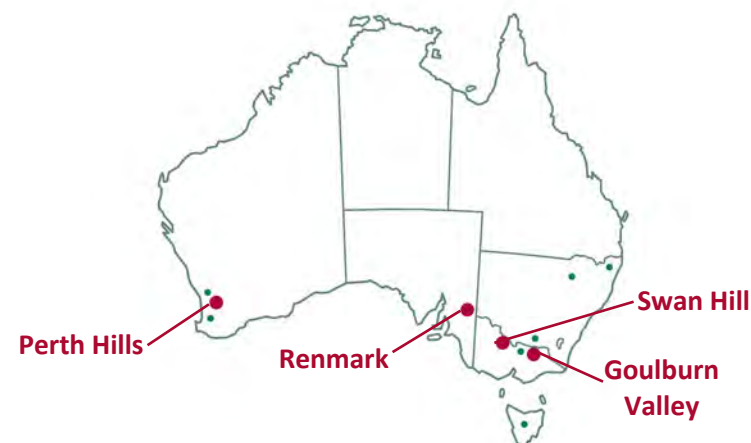


Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,392	7,163	-3%	7,732	+8%
Production (\$m)	\$ 31.8	\$ 29.9	-6%	\$ 29.8	>-1%
Producing Trees (000 Trees)	501	415	-17%	-	-
Fresh Export Volume (t)	601	431	-28%	404	-6%
Fresh Export Value (\$m)	\$ 2.5	\$ 1.7	-34%	\$ 1.9	+14%
Fresh Import Volume (t)	900	794	-12%	434	-45%
Fresh Import Value (\$m)	\$ 4.7	\$ 4.2	-12%	\$ 1.9	-55%
Fresh Supply (t)	6,359	6,270	-1%	6,407	+2%
Fresh Supply Wholesale Value (\$m)	\$ 39.8	\$ 37.6	-6%	\$ 34.8	-7%
Supply per Capita (kg)	0.26	0.26	-3%	0.26	<1%

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

Major Apricots Production Areas

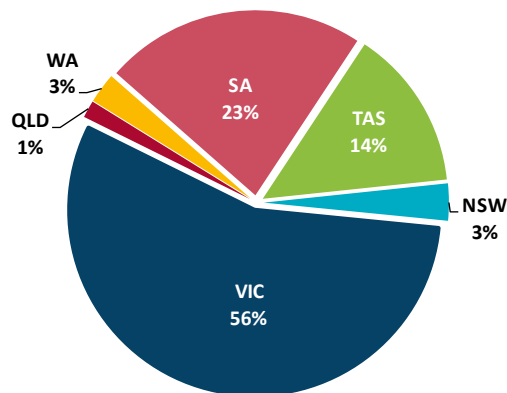
Apricots are primarily produced in the southern states. More than half of production occurs in Victoria, in the **Goulburn Valley** and **Swan Hill** areas. Other major producing areas include **Renmark** in South Australia, and **Perth Hills** in Western Australia.



Source: SAL



2017/18 Fresh Apricots Production by State



Source: SAL

Fresh Apricots Seasonality by State

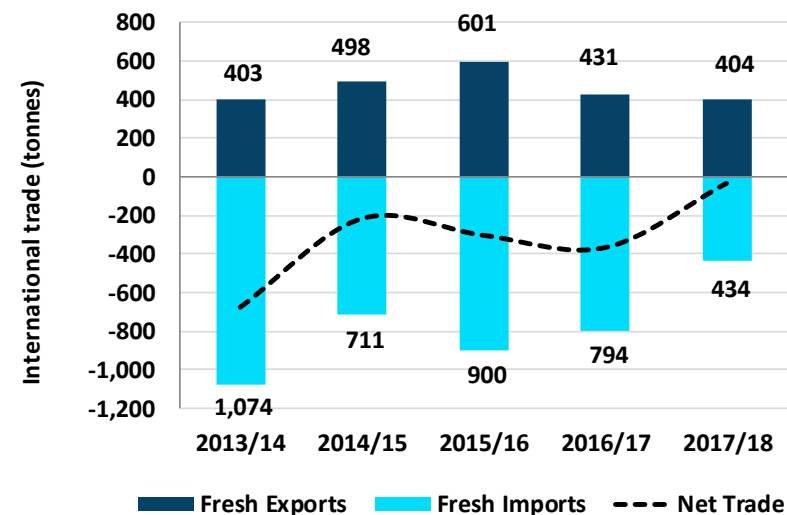
State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	250												
Victoria	4,311												
Queensland	117												
Western Australia	204												
South Australia	1,763												
Tasmania	1,087												
Availability legend			High		Medium		Low						None

Source: SAL

Fresh Apricots International Trade

Australia is a net importer of fresh apricots, typically importing between 400-1,000 tonnes per year. For the year ending June 2018, Australia imported **404 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

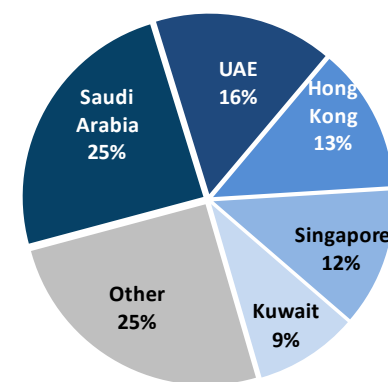
Net Fresh Apricot International Trade



Source: GTA

For the year ending June 2018, **25%** of exported fresh apricots were sent to Saudi Arabia, as profiled in the chart below.

2017/18 Fresh Apricots Exports by Country



Source: GTA



Fresh Apricots Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	418	411	247	Victoria	500	325	320
Queensland	123	111	74	New South Wales	32	73	56
Victoria	223	169	63	Tasmania	1	12	18
Western Australia	135	104	49	Queensland	11	7	4
TOTAL	900	794	434	South Australia	< 0.5	1	< 0.5
				Other	58	14	6
				TOTAL	601	431	404

Fresh Apricots Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New Zealand	858	793	412	Saudi Arabia	151	136	99
Turkey	42	-	19	UAE	232	120	64
US	-	1	3	Hong Kong	30	50	52
China	< 0.5	-	-	Singapore	47	51	50
Other	< 0.5	-	0	Kuwait	45	30	37
TOTAL	900	794	434	Other	95	44	102
				TOTAL	601	431	404

Source: GTA

Processed Apricots International Trade

For the year ending June 2018, an additional **4,442 tonnes** of dried apricots and **2,650 tonnes** of preserved apricots were imported, while **143 tonnes** of dried apricots and **16 tonnes** of preserved apricots were exported.



Source: GTA



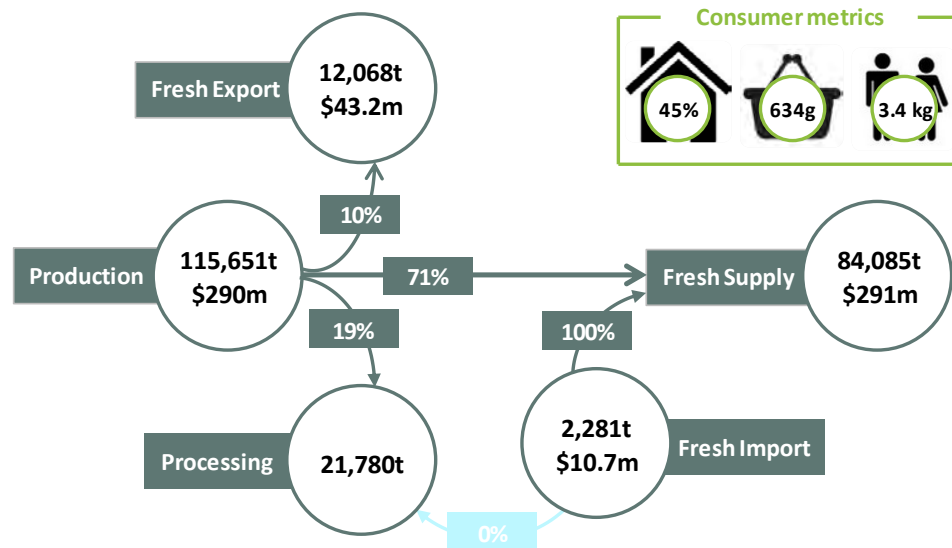
Fresh Nectarines/ Peaches Overview

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

For the year ending June 2018:

- **115,651 t** was produced with **19%** sent to be processed. Majority are peaches destined for canning.
- The value of production was worth **\$289.5 m** while the wholesale value of the fresh supply was **\$291.0 m**.
- **45%** of Australian households purchased fresh nectarines and peaches, buying an average of **634 g** per shopping trip.
- The supply per capita was **3.4 kg**, based on the volume supplied.

Fresh Nectarines/Peaches Supply Chain—Year Ending June 2018



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

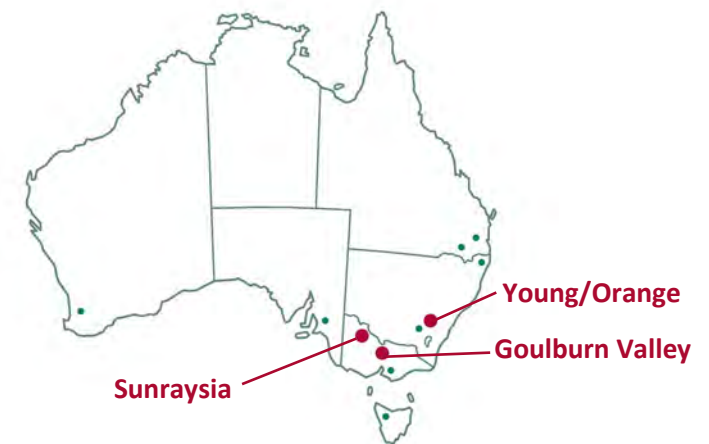
Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	108,571	102,270	-6%	115,651	+13%
Production (\$m)	\$ 281.1	\$ 289.6	+3%	\$ 289.5	>-1%
Producing Trees (000 Trees)	3,562	3,742	+5%	-	-
Fresh Export Volume (t)	10,018	9,023	-10%	12,068	+34%
Fresh Export Value (\$m)	\$ 33.8	\$ 33.9	<1%	\$ 43.2	+28%
Fresh Import Volume (t)	3,653	2,235	-39%	2,281	+2%
Fresh Import Value (\$m)	\$ 15.4	\$ 8.8	-43%	\$ 10.7	+22%
Fresh Supply (t)	82,062	76,400	-7%	84,085	+10%
Fresh Supply Wholesale Value (\$m)	\$ 296.8	\$ 303.0	+2%	\$ 291.0	-4%
Supply per Capita (kg)	3.40	3.12	-8%	3.37	+8%

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

*Note: Production volume has been modified from those published in the previous edition of the handbook (2016/17 edition).

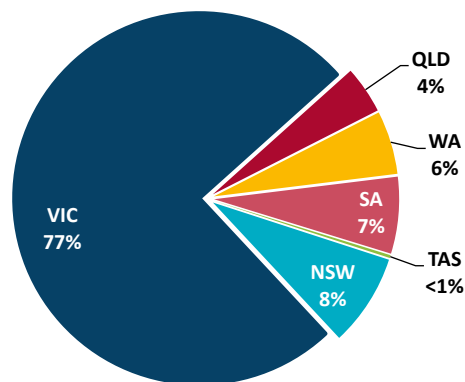
Major Nectarine/Peach Production Areas

Nectarines and peaches are primarily produced in the southern states. More than half of production occurs in Victoria, in the **Goulburn Valley** and **Sunraysia** areas. Other major producing areas include **Young** and **Orange** in New South Wales.



Source: SAL

2017/18 Fresh Nectarines/Peaches Production by State



Source: SAL

Fresh Nectarines/Peaches Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	9,081												
Victoria	88,787												
Queensland	4,596												
Western Australia	5,112												
South Australia	7,822												
Tasmania	254												
Imported	2,281												
Availability legend		High		Medium		Low		None					

Source: SAL

Main Categories

Nectarines accounted for **53%** of combined production for the year ending June 2018.

Peaches accounted for **47%** of combined production for the year ending June 2018.

Seasonality by Category

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

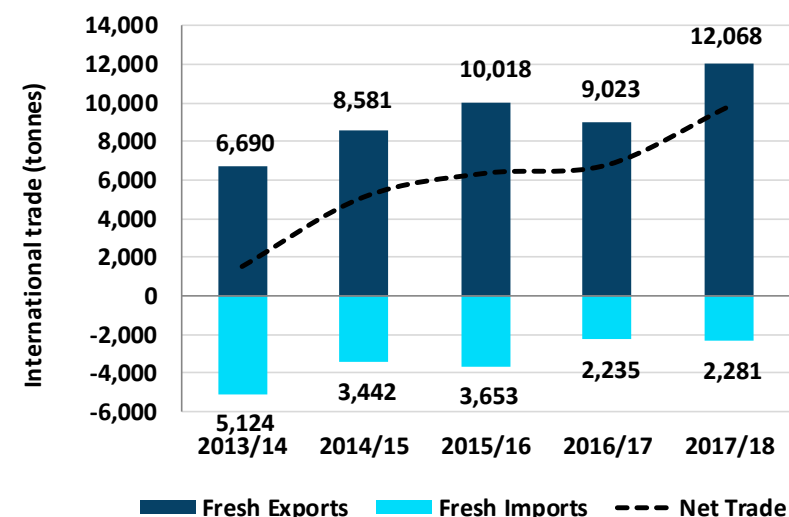
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Nectarines	61,754												
Peaches	53,898												
Availability legend		High		Medium		Low		None					

Source: SAL

Fresh Nectarines/Peaches International Trade

Australia is a net exporter of fresh nectarines and peaches, with exports growing in recent years. For the year ending June 2018, Australia exported **12,068 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

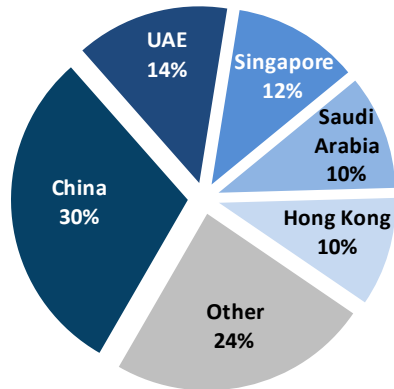
Net Fresh Nectarines/Peaches International Trade



Source: GTA

For the year ending June 2018, **30%** of exported fresh nectarines and peaches were sent to China, as profiled in the chart below.

2017/18 Fresh Nectarines/Peaches Exports by Country



Source: GTA

Fresh Nectarines/Peaches Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	1,715	1,285	1,268	Victoria	8,921	7,355	10,672
Victoria	734	394	489	New South Wales	430	874	939
Western Australia	704	407	350	South Australia	125	165	241
Queensland	499	148	174	Western Australia	30	35	120
TOTAL	3,653	2,235	2,281	Queensland	267	206	79
				Other	245	389	16
				TOTAL	10,018	9,023	12,068

Fresh Nectarines/Peaches Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	3,653	2,201	2,227	China	-	1,866	3,641
China	< 0.5	34	40	UAE	2,343	1,957	1,693
New Zealand	-	-	14	Singapore	965	849	1,391
Other	< 0.5	-	-	Saudi Arabia	707	991	1,267
TOTAL	3,653	2,235	2,281	Hong Kong	4,434	1,711	1,204
				Other	1,569	1,649	2,872
				TOTAL	10,018	9,023	12,068

Source: GTA

Processed Nectarines/Peaches International Trade

For the year ending June 2018, an additional **8,214 tonnes** of preserved peaches were imported, while **34 tonnes** were exported.

Preserved Imports

8,214
\$14.8m

34

\$137,154

Preserved Exports

Source: GTA





Fresh Plums Overview

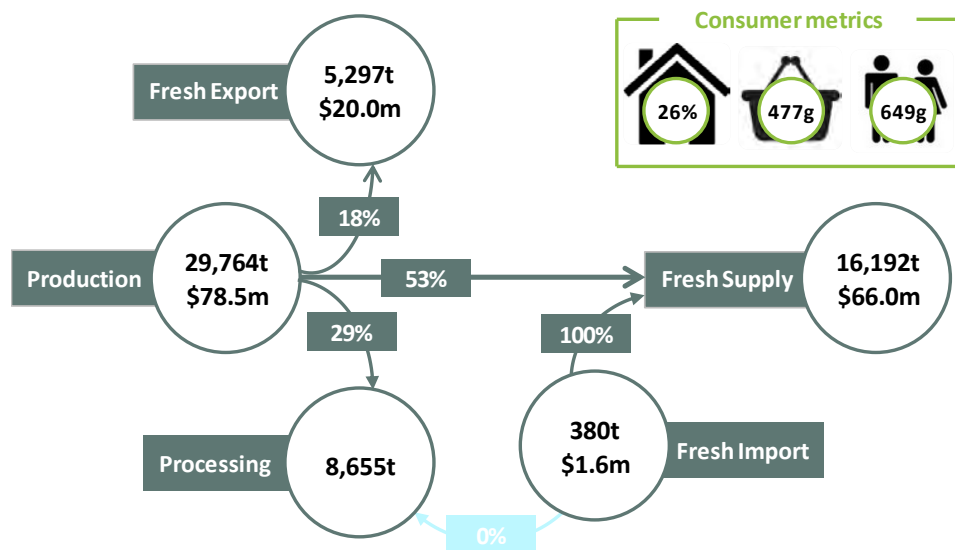
The majority of plum production occurs in the southern states, with Victoria being the major producing state.

For the year ending June 2018:

- **29,764 t** was produced.
- The value of production was **\$78.5 m** while the wholesale value of the fresh supply was **\$66.0 m**.
- **26%** of Australian households purchased fresh plums, buying an average of **477 g** per shopping trip.
- The supply per capita was **649 g**, based on the volume supplied.



Fresh Plums Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	28,881	26,997	-7%	29,764	+10%
Production (\$m)	\$ 64.0	\$ 74.8	+17%	\$ 78.5	+5%
Producing Trees (000 Trees)	1,425	1,488	+4%	-	-
Fresh Export Volume (t)	3,748	4,521	+21%	5,297	+17%
Fresh Export Value (\$m)	\$ 11.9	\$ 15.9	+33%	\$ 20.0	+26%
Fresh Import Volume (t)	798	548	-31%	380	-31%
Fresh Import Value (\$m)	\$ 4.0	\$ 2.6	-34%	\$ 1.6	-40%
Fresh Supply (t)	14,432	14,493	<1%	16,192	+12%
Fresh Supply Wholesale Value (\$m)	\$ 56.4	\$ 65.9	+17%	\$ 66.0	<1%
Supply per Capita (kg)	0.60	0.59	-1%	0.65	+10%

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

Major Plum Production Areas

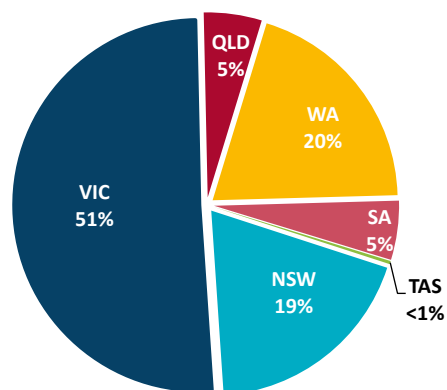
Plums are primarily produced in the southern states. More than half of production occurs in Victoria, in the **Goulburn Valley**. Other major producing areas include **Young** and **Orange** in New South Wales, and **Perth** in Western Australia.



Source: SAL



2017/18 Fresh Plums Production by State



Source: SAL

Fresh Plums Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,634												
Victoria	15,099												
Queensland	1,507												
Western Australia	5,906												
South Australia	1,537												
Tasmania	83												
Imported	380												
Availability legend		<div></div> High <div></div> Medium <div></div> Low <div></div> None											

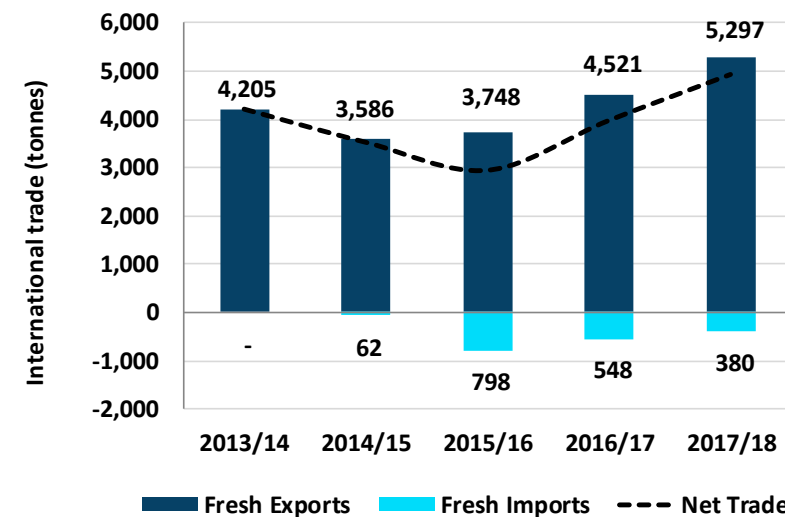
Source: SAL

Fresh Plums International Trade

Australia is a net exporter of fresh plums, typically exporting between 3,000-5,000 tonnes per year. For the year ending June 2018, Australia exported **5,297 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



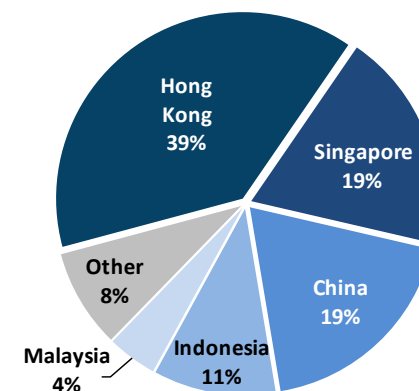
Net Fresh Plums International Trade



Source: GTA

For the year ending June 2018, **39%** of exported fresh plums were sent to Hong Kong, as profiled in the chart below.

2017/18 Fresh Plums Exports by Country



Source: GTA



Fresh Plums Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
New South Wales	354	254	177	Victoria	1,545	2,088	2,418
Victoria	197	148	155	New South Wales	851	1,830	1,794
Western Australia	149	86	39	Western Australia	1,038	437	952
Queensland	99	60	9	Queensland	142	48	86
TOTAL	798	548	380	Tasmania	8	-	32
				Other	163	117	16
				TOTAL	3,748	4,521	5,297

Fresh Plums Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	798	548	379	Hong Kong	1,948	3,096	2,052
Germany	-	-	1	Singapore	1,011	772	1,009
Iran	-	< 0.5	-	China	-	1	993
Singapore	-	< 0.5	-	Indonesia	164	276	562
Other	-	< 0.5	-	Malaysia	214	174	228
TOTAL	798	548	380	Other	411	201	453
				TOTAL	3,748	4,521	5,297

Source: GTA





Fresh Table Grapes Overview

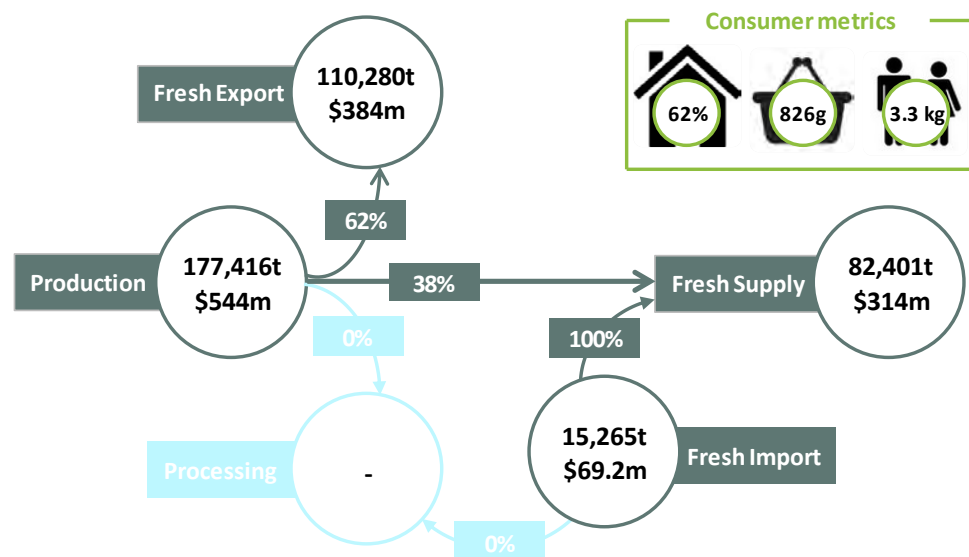
Table grapes are grown across all states of Australia, with Victoria being the major producing state.

For the year ending June 2018:

- **177,416 t** was produced.
- The value of production was **\$543.7 m** while the wholesale value of the fresh supply was **\$313.7 m**.
- **62%** of Australian households purchased table grapes, buying an average of **826 g** per shopping trip.
- The supply per capita was **3.3 kg**, based on the volume supplied.

Note: Table grape volumes do not include grapes grown for wine or drying. Dried grape production can be found on page 212. Wine grapes are not covered in this handbook.

Fresh Table Grapes Supply Chain—Year Ending June 2018



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

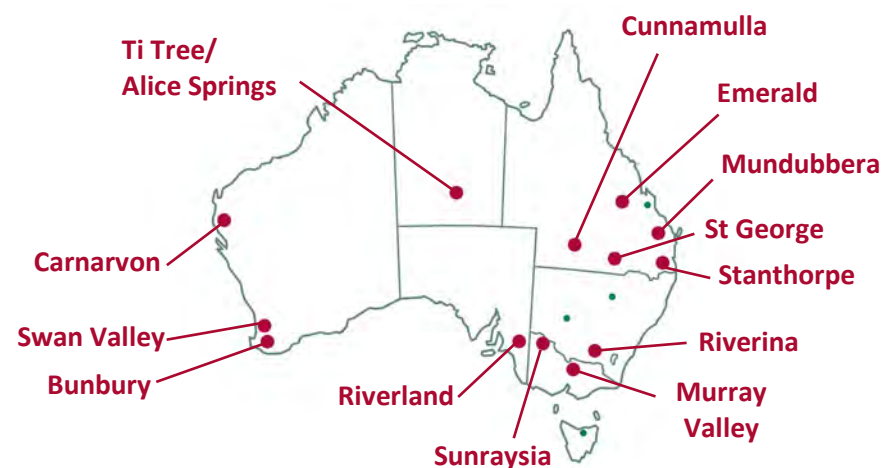


Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	178,595	171,637	-4%	177,416	+3%
Production (\$m)	\$ 514.5	\$ 534.4	+4%	\$ 543.7	+2%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	110,007	106,666	-3%	110,280	+3%
Fresh Export Value (\$m)	\$ 367.3	\$ 372.7	+1%	\$ 384.1	+3%
Fresh Import Volume (t)	13,784	14,405	+5%	15,265	+6%
Fresh Import Value (\$m)	\$ 66.1	\$ 63.3	-4%	\$ 69.2	+9%
Fresh Supply (t)	82,372	79,376	-4%	82,401	+4%
Fresh Supply Wholesale Value (\$m)	\$ 285.8	\$ 312.8	+9%	\$ 313.7	<1%
Supply per Capita (kg)	3.42	3.24	-5%	3.30	+2%

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

Major Table Grape Production Areas

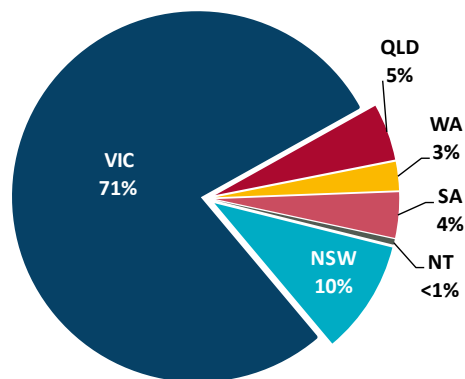
Table grapes are produced in all Australian states. The majority of production occurs in Victoria, in the **Sunraysia** and **Murray Valley** areas. Other major producing areas include: the **Riverland** in South Australia; **Carnarvon**, **Swan Valley** and **Bunbury** in Western Australia; **Ti Tree/Alice Springs** in the Northern Territory; **Mundubbera**, **Emerald**, **St George**, **Cunnamulla** and **Stanthorpe** in Queensland; and the **Riverina** in New South Wales.



Source: ATGA



2017/18 Fresh Table Grapes Production by State



Source: ATGA

Fresh Table Grapes Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	17,742												
Victoria	138,384												
Queensland	8,871												
Western Australia	4,453												
South Australia	7,097												
Northern Territory	869												
Imported	15,265												
Availability legend			High		Medium		Low						

Source: ATGA

Main Table Grape Varieties

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

Menindee and **Thompson**, the two most common green varieties in Australia. These grapes accounted for **38%** of fresh production for the year ending June 2018.

Crimson, **Flame** and **Globe**, the main red varieties in Australia. These three varieties accounted for **31%** of fresh production.

Sugrathirteen, the most common black variety in Australia, accounted for **2%** of fresh production.



Seasonality by Table Grape Variety

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

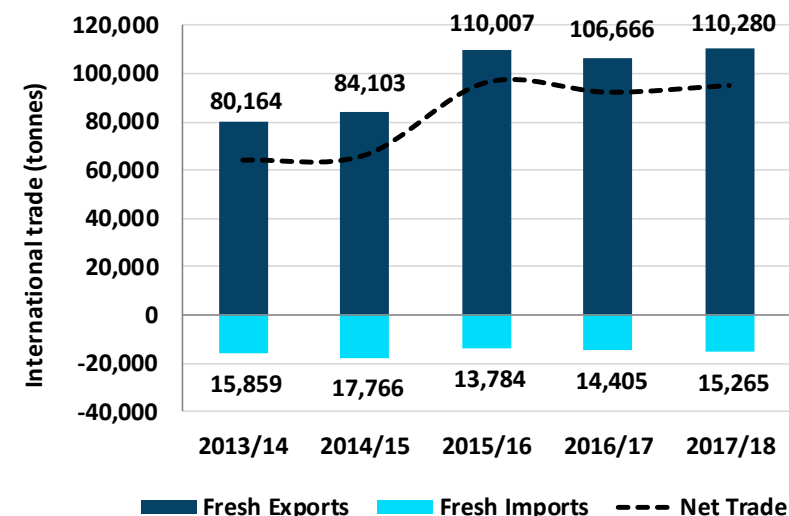
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Menindee	23,064												
White - Thompson	44,354												
Red - Crimson	33,709												
Red - Flame	10,645												
Red - Globe	8,871												
Black	7,068												
Other	49,705												
Availability legend			High		Medium		Low						

Source: ATGA

Fresh Table Grapes International Trade

Australia is a net exporter of fresh table grapes, with exports growing in recent years. For the year ending June 2018, Australia exported **110,280 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Table Grapes International Trade

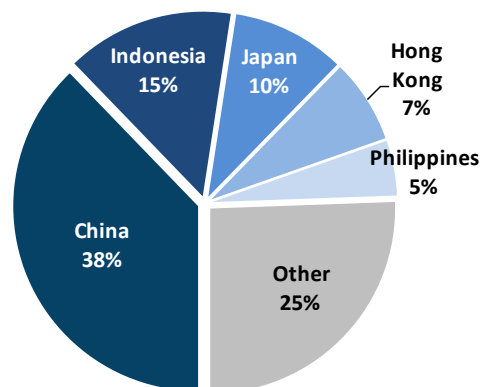


Source: GTA



For the year ending June 2018, **39%** of exported fresh table grapes were sent to China, as profiled in the chart below.

2017/18 Fresh Table Grapes Exports by Country



Source: GTA

Fresh Table Grapes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
Victoria	6,000	6,198	6,998	Victoria	101,735	99,911	100,489
New South Wales	4,904	5,698	5,866	New South Wales	5,273	5,623	8,315
Western Australia	1,224	1,439	1,279	Queensland	1,691	238	865
Queensland	1,575	1,058	1,123	South Australia	628	255	344
South Australia	80	12	-	Western Australia	25	53	218
Other	-	< 0.5	-	Other	655	587	48
TOTAL	13,784	14,405	15,265	TOTAL	110,007	106,666	110,280

Fresh Table Grapes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2016	2017	2018	Year Ending June	2016	2017	2018
US	13,711	14,382	15,224	China	29,936	41,114	41,668
Mexico	-	-	17	Indonesia	17,363	15,586	16,149
China	-	-	14	Japan	9,383	8,397	10,882
Sth. Korea	53	23	10	Hong Kong	13,097	8,013	8,074
Other	21	-	< 0.5	Philippines	4,446	3,684	5,310
TOTAL	13,784	14,405	15,265	Other	35,783	29,871	28,197
				TOTAL	110,007	106,666	110,280

Source: GTA





Dried Grapes Overview

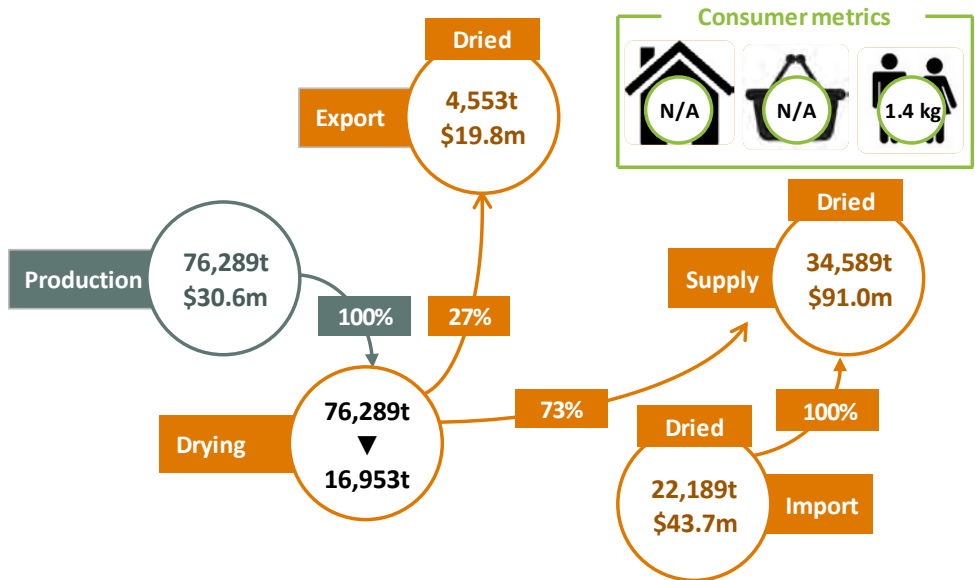
Grapes grown for drying are predominantly grown in Victoria and New South Wales with **Sunraysia** being the major producing area. The main varieties grown for dried grapes include sultanas, currants and raisins.



For the year ending June 2018:

- **76,289 t** of fresh grapes were produced for drying, which after drying accounted for **16,953 tonnes** of dried grapes.
- The value of production of the fresh grapes grown for drying was **\$30.6 m**, while the wholesale value of the dried supply was **\$91.0 m**.
- The dried supply per capita was **1.41 kg**, based on the volume supplied.

Dried Grapes Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	18,309	15,000	-18%	16,953	+13%
Production (\$m)	\$ 33.0	\$ 27.0	-18%	\$ 30.6	+13%
Production area (Ha)	-	-	-	3,840	-
Dried Export Volume (t)	5,000	4,484	-10%	4,553	+2%
Dried Export Value (\$m)	\$ 19.4	\$ 18.7	-4%	\$ 19.8	+6%
Dried Import Volume (t)	20,259	21,940	+8%	22,189	+1%
Dried Import Value (\$m)	\$ 52.1	\$ 46.6	-11%	\$ 43.7	-6%
Dried Supply (t)	33,569	32,456	-3%	34,589	+7%
Dried Supply Wholesale Value (\$m)	\$ 101.5	\$ 92.0	-9%	\$ 91.0	-1%
Supply per Capita (kg)	1.39	1.32	-5%	1.41	+7%

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

Major Dried Grape Production Areas

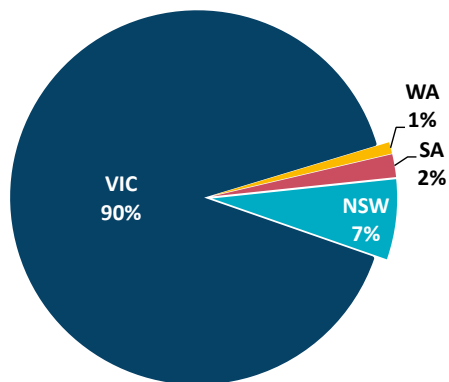
The majority of production of table grapes for drying occurs in Victoria, particularly in the **Sunraysia** area of Victoria, including the **Mildura** region and along the **Murray** and **Darling Rivers** south west of New South Wales.



Source: DFA



2017/18 Dried Grapes Production by State



Source: DFA

Dried Grapes Production Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,340												
Victoria	68,660												
Western Australia	763												
South Australia	1,526												
Fresh production legend		High		Medium		Low		None					

Source: DFA

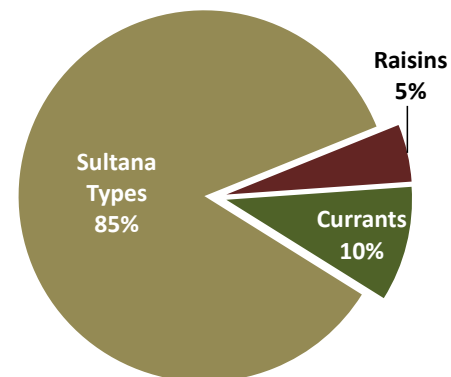
Main Dried Grape Varieties

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

Sultana types, which are the most commonly dried grape variety in Australia. These dried grapes accounted for **85%** of production.

Currants and **raisins** are the alternative varieties of dried grapes grown in Australia and accounted for **15%** of production.

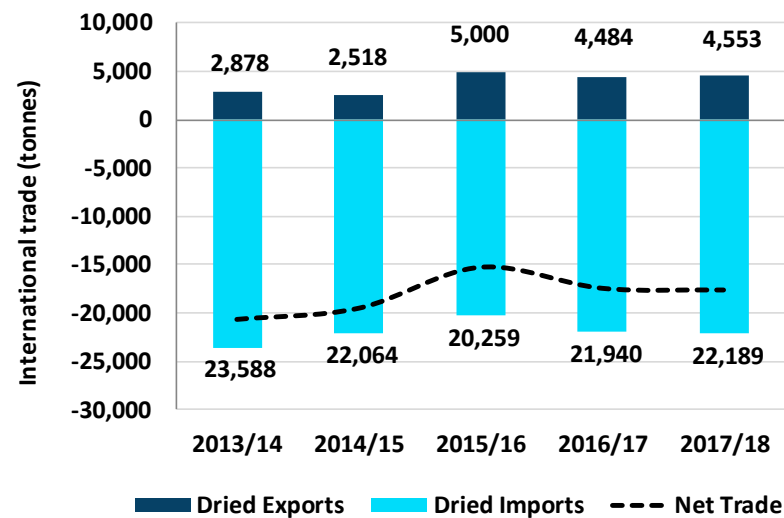
2017/18 Main Dried Grape Varieties



Source: DFA

Processed Dried Grapes International Trade

For the year ending June 2018, Australia imported **22,189 tonnes** of dried grapes. The exports and imports of dried grapes over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



Prunes Overview

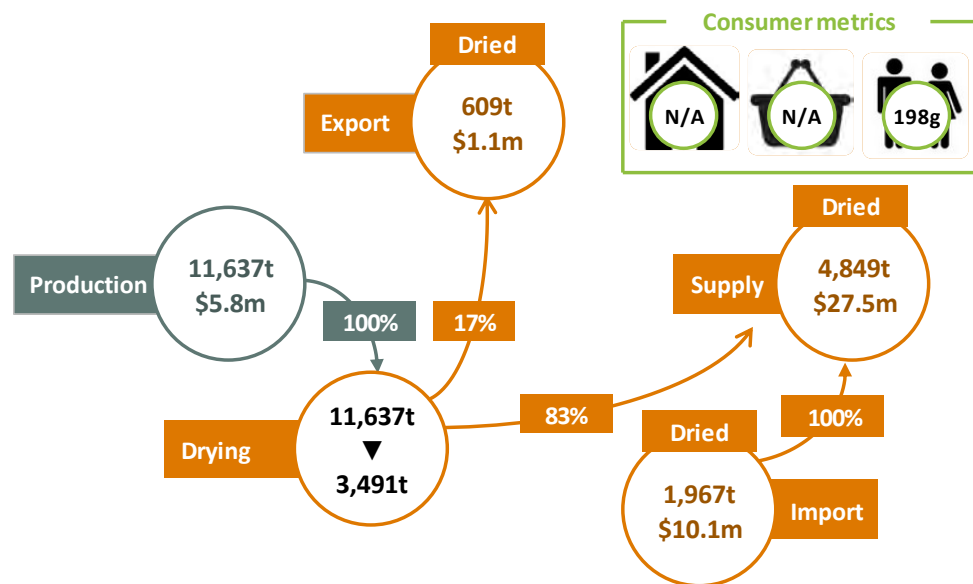
Plums grown for drying are predominantly grown in New South Wales and Victoria, with **Griffith** being the major producing area.

For the year ending June 2018:

- **11,637 t** of fresh plums were produced for drying, which after drying accounted for **3,491 tonnes** of prunes.
- The value of production of the fresh plums grown for drying was **\$5.8 m**, while the wholesale value of the dried supply was **\$27.5 m**.
- The dried supply per capita was **198 g**, based on the volume supplied.



Prunes Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	3,286	2,380	-28%	3,491	+47%
Production (\$m)	\$ 7.9	\$ 5.3	-32%	\$ 5.8	+8%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	1,035	1,124	+9%	609	-46%
Dried Export Value (\$m)	\$ 2.4	\$ 2.7	+9%	\$ 1.1	-60%
Dried Import Volume (t)	2,705	2,803	+4%	1,967	-30%
Dried Import Value (\$m)	\$ 14.2	\$ 13.7	-3%	\$ 10.1	-26%
Dried Supply (t)	4,955	4,059	-18%	4,849	+19%
Dried Supply Wholesale Value (\$m)	\$ 28.5	\$ 21.8	-23%	\$ 27.5	+26%
Supply per Capita (kg)	0.21	0.17	-19%	0.20	+19%

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

**Note: Production volume has been modified from those published in the previous edition of the handbook (2016/17 edition).*

Major Prunes Production Areas

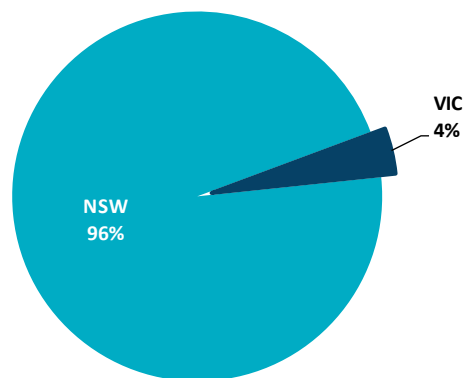
The majority of production of plums for drying occurs in New South Wales, particularly in the **Griffith** region. Other producing regions include Young in NSW and Cobram in Victoria.



Source: DFA



2017/18 Prunes Production by State



Source: DFA

Prunes Production Seasonality by State

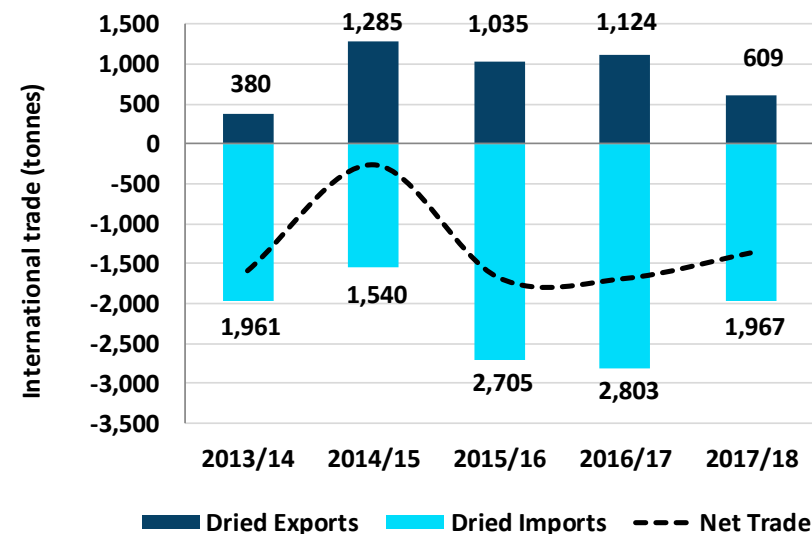
State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	11,171												
Victoria	465												
Fresh production legend			High			Medium			Low			None	

Source: DFA



Prunes International Trade

For the year ending June 2018, Australia imported **1,967 tonnes** and exported **609 tonnes** of prunes. The exports and imports of prunes over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



Dried Tree Fruit Overview

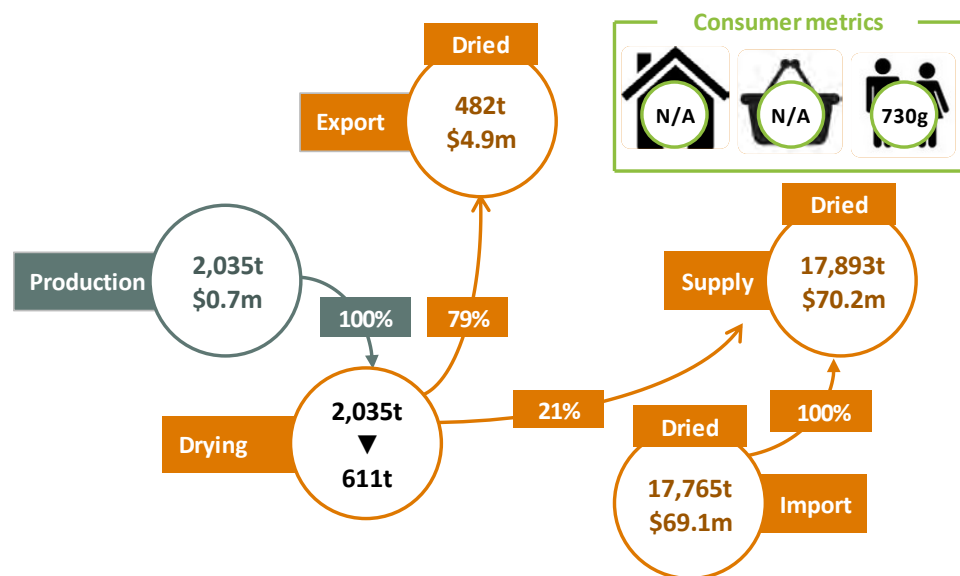
Dried Tree Fruits other than plums are a combination of dried fruits from different categories, predominantly summerfruit. The majority of the fruit grown for this category are from **Riverland**, **Sunraysia** and **Goulburn** regions.



For the year ending June 2018:

- **2,035 t** of fresh tree fruit were produced for drying, which after drying accounted for **611 tonnes** of dried tree fruit.
- The value of production of the fresh tree fruit grown for drying was **\$0.7 m**, while the wholesale value of the dried supply was **\$70.2 m**.
- The dried supply per capita was **730 g**, based on the volume supplied.

Dried Tree Fruit Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	388	458	+18%	611	+33%
Production (\$m)	\$ 0.4	\$ 0.5	+40%	\$ 0.7	+19%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	229	241	+6%	482	+100%
Dried Export Value (\$m)	\$ 3.7	\$ 3.0	-19%	\$ 4.9	+63%
Dried Import Volume (t)	18,193	17,854	-2%	17,765	>-1%
Dried Import Value (\$m)	\$ 82.7	\$ 74.6	-10%	\$ 69.1	-7%
Dried Supply (t)	18,353	18,071	-2%	17,893	>-1%
Dried Supply Wholesale Value (\$m)	\$ 85.0	\$ 77.1	-9%	\$ 70.2	-9%
Supply per Capita (kg)	0.76	0.74	-3%	0.73	>-1%

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

Major Dried Tree Fruit Production Areas

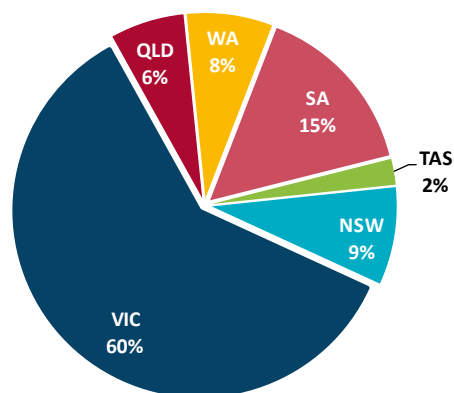
Tree fruits grown for drying are grown across Australia, with this category consisting of a number of different fruit categories. The majority of production of apricots for drying occurs in **Riverland** and **Sunraysia**. Peaches, nectarines, apples and pears are also grown and dried in smaller quantities in **Goulburn Valley**.



Source: DFA



2017/18 Dried Tree Fruit Production by State



Source: DFA

Fresh Tree Fruit Production for drying—Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	173												
Victoria	1,223												
Queensland	131												
Western Australia	152												
South Australia	309												
Tasmania	46												
Fresh production legend		<div style="display: flex; justify-content: space-around;"> High Medium Low None </div>											

Source: DFA

Main Dried Tree Fruit Varieties

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

Apricots accounted for **47%** of production.

Apples grown for drying accounted for **36%** of production.

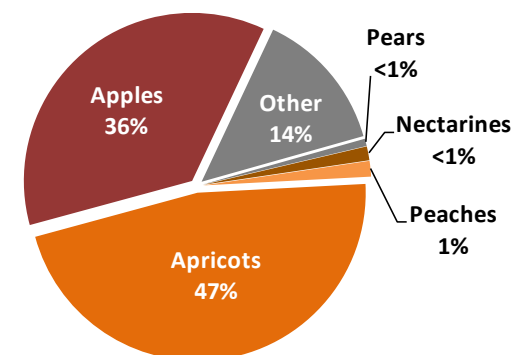
Nectarines and **Peaches** and accounted for **2%** of production.

Pears grown for drying accounted for less than **1%** of production.

Other fruits grown for drying, including pineapples and mandarins, accounted for **14%** of production.



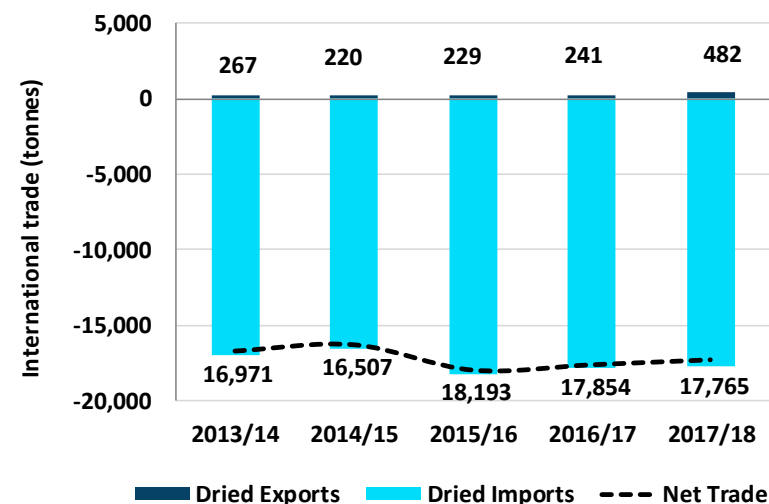
2017/18 Main Dried Tree Fruit Varieties



Sources: GTA; DFA

Processed Dried Tree Fruit International Trade

For the year ending June 2018, Australia imported **17,765 tonnes** of dried tree fruit. The exports and imports of dried fruit over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



Canned Fruit Overview

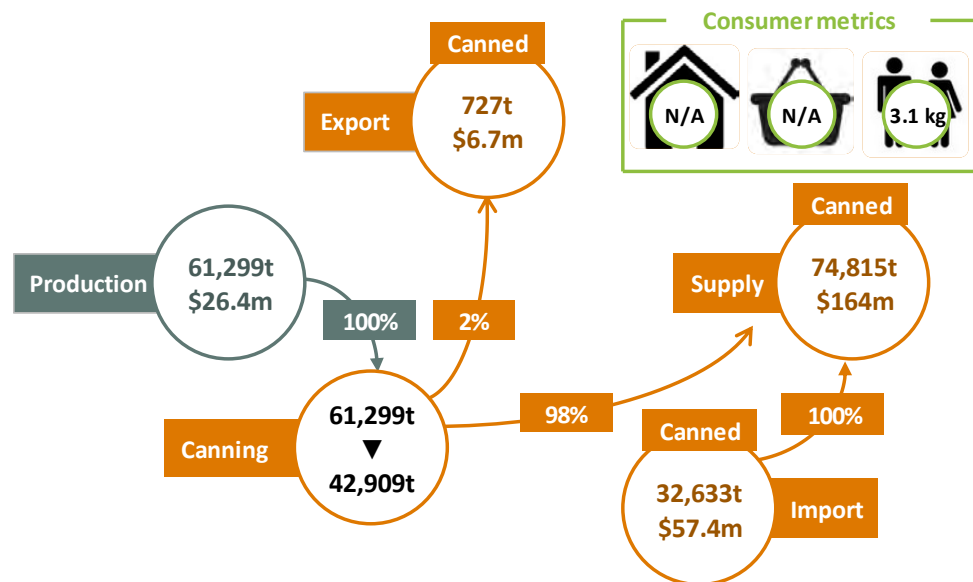
Canned Fruit is a combination of fruits from different categories, predominantly pineapples, peaches and pears. The majority of the fruit grown for this category are found around Australia typically within close proximity to canning processors.

For the year ending June 2018:

- **61,299 t** of fresh fruit was produced for canning.
- The value of production of the fresh fruit grown for canning was **\$26.4 m**, while the wholesale value of the canned supply was **\$164.0 m**.
- The supply per capita was **3.1 kg**, based on the volume supplied.



Canned Fruit Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Canned Production (t)	41,874	41,424	-1%	42,909	+4%
Production (\$m)	\$ 25.9	\$ 25.8	>-1%	\$ 26.4	+2%
Production area (Ha)	-	-	-	-	-
Canned Export Volume (t)	1,501	1,057	-30%	727	-31%
Canned Export Value (\$m)	\$ 6.1	\$ 5.1	-16%	\$ 6.7	+30%
Canned Import Volume (t)	33,601	33,795	<1%	32,633	-3%
Canned Import Value (\$m)	\$ 61.3	\$ 64.7	+5%	\$ 57.4	-11%
Canned Supply (t)	73,974	74,162	<1%	74,815	<1%
Supply Wholesale Value (\$m)	\$ 167.3	\$ 175.7	+5%	\$ 164.0	-7%
Supply per Capita (kg)	3.07	3.03	-1%	3.05	<1%

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

*Note: Production and supply volume and value has been modified from those published in the previous edition of the handbook (2016/17 edition).

Major Canned Fruit Production Areas

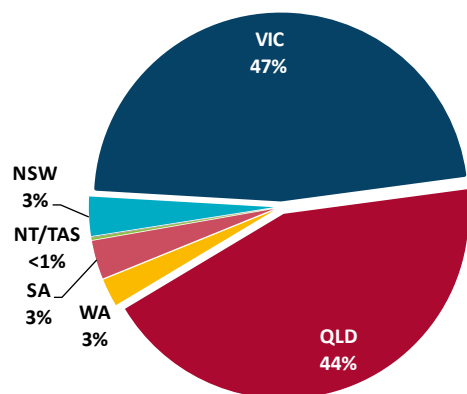
Fruit grown for canning is grown across Australia as this category consists of a variety of different fruits. The majority of production of pineapples for canning occurs in the **Sunshine Coast** and **Yeppoon** regions of Queensland. Peaches, apricots, and pears are also grown and canned in the **Goulburn Valley**.



Source: (Freshlogic Analysis)



2017/18 Canned Fruit Production by State



Source: (Freshlogic Analysis)

Fresh Fruit Production for Canning—Seasonality by State

State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,102												
Victoria	28,779												
Queensland	26,686												
Western Australia	1,498												
South Australia	2,070												
Tasmania	129												
Northern Territory	36												
Availability legend		<div style="display: flex; justify-content: space-around;"> High Medium Low None </div>											

Source: (Freshlogic Analysis)

Main Canned Fruit Products

There are a number of categories of tree fruits grown for canning in Australia and consists mainly of 3 main types for the year ending 2018. These include:

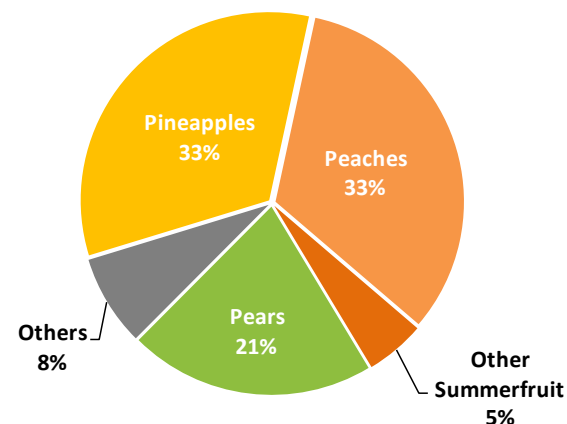
Pineapples account for **33%** of canned fruit processing for the year.

Summerfruit including peaches, apricots, and plums from the **Goulburn** region accounted for **38%** of canned fruit production.

Pears account for **21%** of the fruit grown for canning in Australia.

Other fruit account for **8%** of the remaining canned fruit.

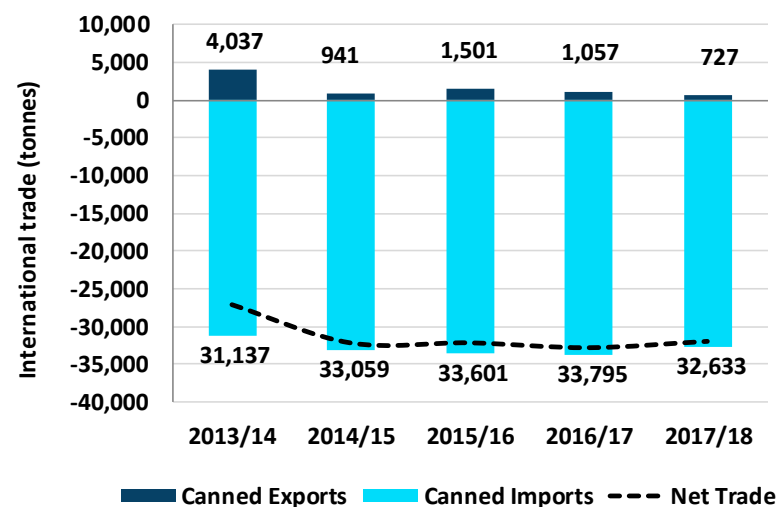
2017/18 Main Canned Fruit Products



Source: (Freshlogic Analysis)

Processed Canned Fruit International Trade

For the year ending June 2018, Australia imported **32,633 tonnes** of canned fruit. The exports and imports of canned fruit over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



Olives Overview

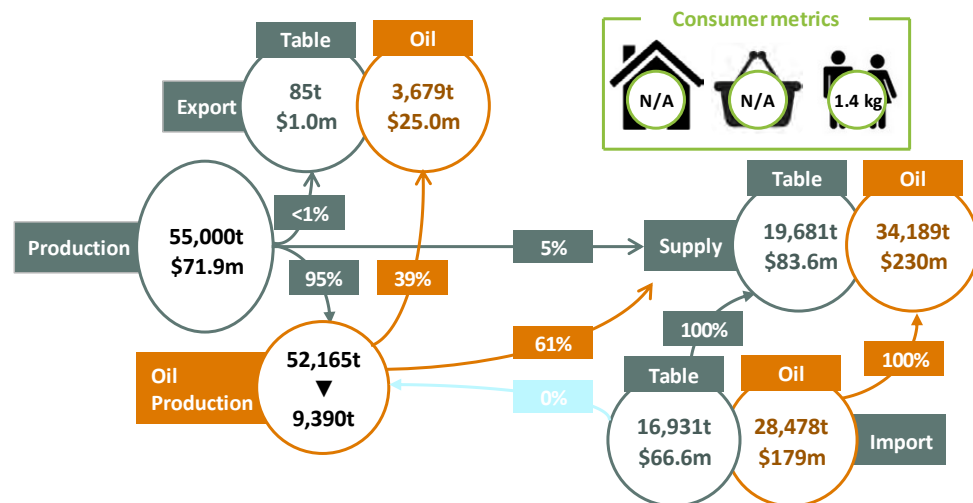
Olives are grown in many states of Australia, with the majority of production being grown in Victoria. Almost all olives grown in Australia are grown for the production of olive oil, with some grown for use as table olives. Both forms are profiled below.



For the year ending June 2018:

- **55,000 t** of fresh olives were produced, **95%** or **52,165 t** of which were extracted for oil, producing **9,390 tonnes** equivalent to **10.3 million litres** of olive oil.
- The value of production of olives was **\$71.9 m**, while the wholesale value of the oil supply was **\$230.3 m** and the wholesale value of the table supply was **\$83.6 m**.
- The consumption of **olive oil** per capita was **1.4 kg**, based on the volume supplied.

Olive Oil/Table Olive Supply Chain—Year Ending June 2018



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



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	90,323	130,000	+44%	55,000	-58%
Production (\$m)	\$ 112.1	\$ 125.1	+12%	\$ 71.9	-43%
Production area (Ha)	20,568	20,568	-	20,568	-
Olive Oil Export Volume (t)	4,827	3,800	-21%	3,679	-3%
Olive Oil Export Value (\$m)	\$ 29.5	\$ 21.9	-26%	\$ 25.0	+15%
Olive Oil Import Volume (t)	24,992	30,164	+21%	28,478	-6%
Olive Oil Import Value (\$m)	\$ 140.5	\$ 163.7	+17%	\$ 178.8	+9%
Olive Oil Supply (t)	36,423	43,931	+21%	34,189	-22%
Olive Oil Wholesale Value (\$m)	\$ 232.8	\$ 271.1	+16%	\$ 230.3	-15%
Oil Consumption per Capita (kg)	1.51	1.79	+19%	1.39	-22%

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

*Note: Olive Oil Wholesale Value has been modified from those published in the previous edition of the handbook (2016/17 edition).

Major Olive Production Areas

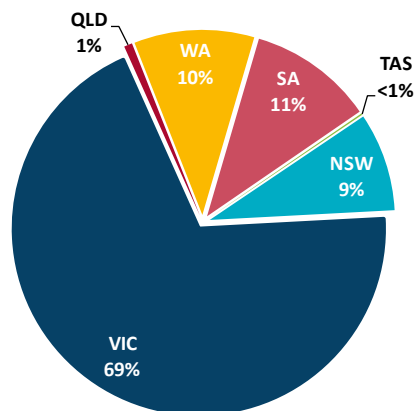
The majority of production of olives in Australia occurs in Victoria, with the largest production area being in the **Murray Valley region** north west of Victoria. Other areas of production include Riverina region in NSW and Boort in Victoria.



Source: AOA



2017/18 Olives Production by State



Source: AOA

Fresh Olive Production —Seasonality by State

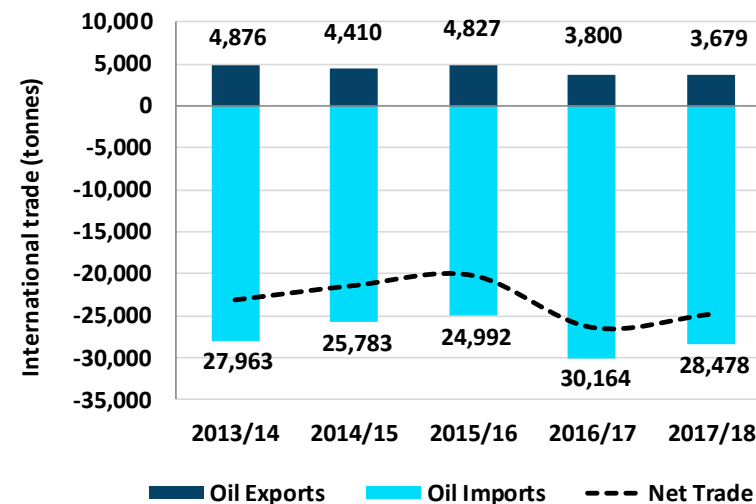
State	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	4,730												
Victoria	38,033												
Queensland	396												
Western Australia	5,775												
South Australia	5,995												
Tasmania	72												
Availability legend			High		Medium		Low						None

Source: AOA



Olive Oil International Trade

For the year ending June 2018, Australia imported **28,478 tonnes** of olive oil (**this number does not include table olives**). The exports and imports of olive oil over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

