



Australian Horticulture Statistics Handbook

Fruit

2016/17

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The Australian Horticulture Statistics Handbook 2016/17 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 2017.

Summary of Approach

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

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

- Farm gate production quantity has been informed through a number of sources, including Hort Innovation funded data projects, horticultural government levy data where available, and refined through consultation with informed industry bodies. The corresponding value of production is calculated from wholesale pricing information, before removing known logistical, marketing and wholesale costs to reflect product value at the farm gate.
- Export and import trade volume and value is based on Australian Customs data as reported in IHS Global Trade Atlas data.
- Processing data has been obtained through consultation with industry 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 2017 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 were disrupted by climate events in Queensland and biosecurity in Western Australia with most of the impact on vegetables. In these conditions the wholesale value per kg of fresh fruit and vegetables supplied to the local market increased by 11.4% to \$2.45 per kg.

The domestic food market conditions remain competitive as new entrants into the retail channel expanded their store networks. Australian household expenditure on food out of home increased to 34.8% of total food expenditure and was reflected in stronger demand from food service buyers.

Total fresh horticulture exports were valued at **\$2.01 billion** in 2016/17 with increases in the exports of citrus, table grapes, macadamias, and carrots. This was 5% lower than the previous year, primarily driven by a marked reduction in Almond export prices.

Export market optimism has once again lifted and is reflected in a higher level of investment in export market development activity.

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Availability of valid statistical information is a key enabler across horticulture. The Australian Horticulture Statistics Handbook for the year ending 30 June 2017, 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.

Headers in import and export analysis tables for each category have been revised in this edition for clarity. ‘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 2015/16 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 2016/17 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
2016/17	Year ending 30 June 2017
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.

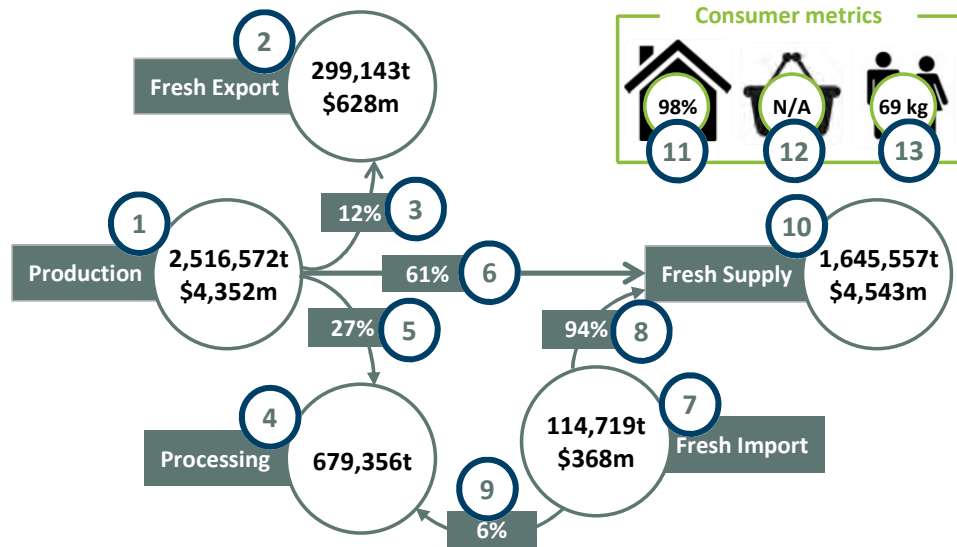
Kernel (Nut categories) —A measure of volume that only includes the edible kernel.

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 2017. It contains the following elements:

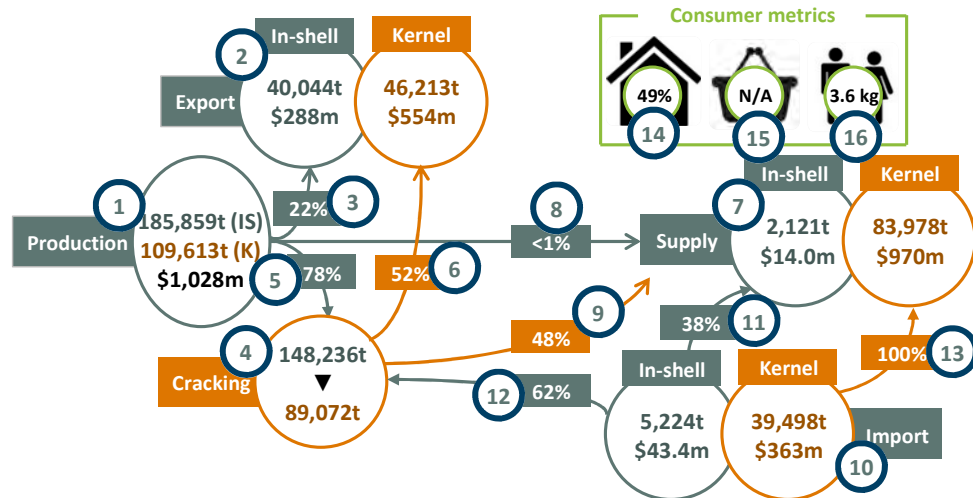


- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2017. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
- 2. 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 2017. '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 2017. 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 2017. 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:



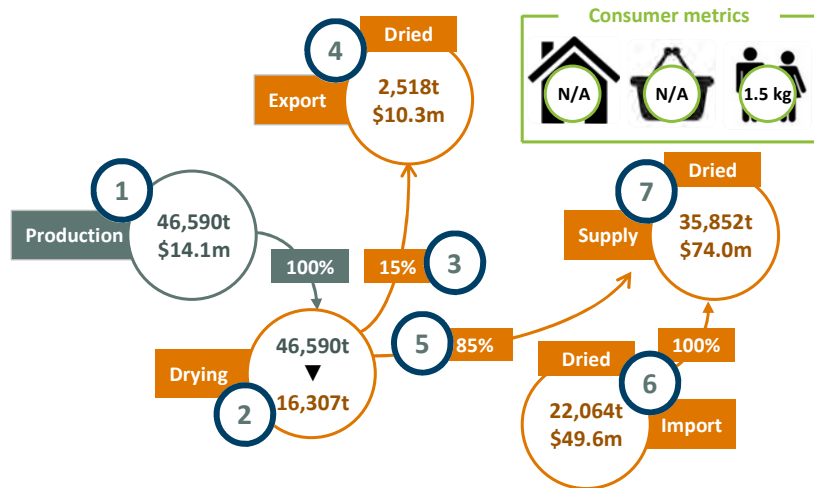
- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2017. This profiles the **Production** (volume in tonnes), in both *In-Shell* (written in *green* and denoted by *IS*) and the *Kernel* equivalent of this volume after cracking (written in *orange* and 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 2017. 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 2017. 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 2017. It contains the following elements:



- 1. Production.** The volume of the category grown in Australia over the year ending June 2017. 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 2015, June 2016 and June 2017), as well as the percentage change in value year on year. They contain:

Year Ending June	2013		2014		2015	
	Value	Value	% YoY	Value	% YoY	
Production (t)	77,844	83,527	+7%	87,543	+5%	
Production (\$m)	\$ 567.0	\$ 644.2	+14%	\$ 679.0	+5%	
Production area (Ha)	2,092	3,123	+49%	-	-	
Fresh Export Volume (t)	850	1,630	+92%	2,015	+24%	
Fresh Export Value (\$m)	\$ 6.3	\$ 11.8	+88%	\$ 14.5	+23%	
Fresh Import Volume (t)	1,098	1,138	+4%	1,039	-9%	
Fresh Import Value (\$m)	\$ 17.0	\$ 19.1	+12%	\$ 18.6	-2%	
Fresh Supply (t)	65,660	70,217	+7%	73,271	+4%	
Fresh Supply Wholesale Value (\$m)	\$ 681.4	\$ 767.1	+13%	\$ 809.0	+5%	
Supply per Capita (kg)	2.84	2.99	+5%	3.08	+3%	

- Production.** The volume of the category grown in Australia.
- Value of Production.** The value of the production over the year.
- Production Area/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 2017 according to the ABS. The number of occupied households is assumed at 8.4 million and the population at 24.6 million for the 2016/17 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

<u>Abbreviation</u>	<u>Data Source</u>	<u>Further information</u>
ABS	<i>Agricultural Commodities</i> , Australian Bureau of Statistics	Information from <i>Agricultural Commodities cat. no. 7121.0</i> , 2015-16, 2014-15 and 2013-14 editions has been compiled. <i>Australian Demographic Statistics cat. no. 3101.0</i> June 2017 edition. <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

<u>Abbreviation</u>	<u>Data Source</u>	<u>Further information</u>
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.

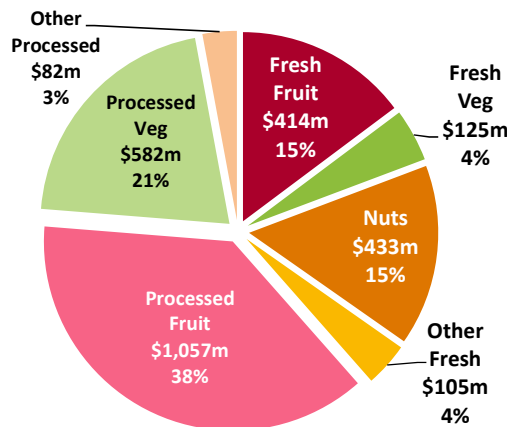
<u>Project Code</u>	<u>Project Title</u>
AL16002 (Almonds)	<i>Australian Almond Industry Statistics</i>
AP16002 (Apples)	<i>Apple and Pear Crop Estimates</i>
AV16006 (Avocados)	<i>Avocado Industry Data Capture and Analysis</i>
CH15000 (Chestnuts)	<i>Communication and adoption program for the Australian Chestnut Industry</i>
CT15012 (Citrus)	<i>Australian Citrus Industry Innovation and Market Development Program</i>
CU15002 (Custard Apples)	<i>Custard Apple Dispatch System 2</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 and Extension for the Australian mango industry (Crop Forecast)</i>
NY16004 (Nursery)	<i>Nursery industry statistics and research 2016/17</i>
PI13006 (Pineapples)	<i>Study groups enabling industry adaption to pineapple market changes (V)</i>

Data sharing-List of projects

<u>Project Code</u>	<u>Project Title</u>
TM13007 (Tomatoes)	<i>Australian Processing Tomato Industry Capacity Building Program</i>
TU16001 (Turf)	<i>Turf industry statistics and research 2016/17</i>
VG15077 (Vegetables)	<i>Financial Performance of Australian Vegetable Farms 2016-17 to 2018-19</i>

Total Imports

For the year ending June 2017, Australia imported **\$2.79 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.

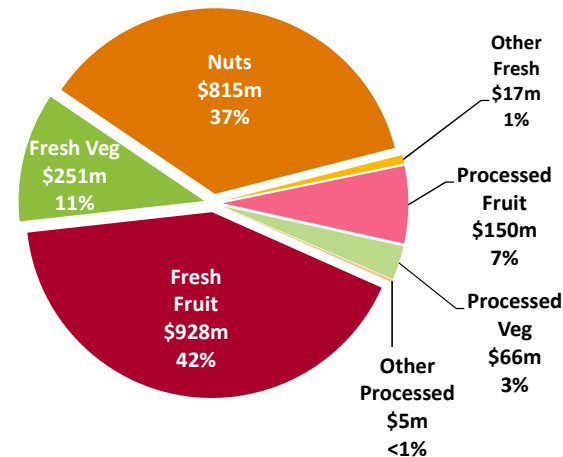


Sources: GTA; (Freshlogic Analysis)

Fresh Fruit	\$413.7m	Other Fresh Horticulture	\$105.1m
Avocados	\$116.9m	Cut Flowers	\$66.8m
Grapes	\$63.3m	Bulbs	\$23.3m
Kiwifruit.....	\$50.9m	Live Plants.....	\$15.0m
Fresh Vegetables	\$125.2m	Processed Fruit	\$1,056.7m
Garlic.....	\$46.0m	Olives and Olive Oil.....	\$223.8m
Asparagus.....	\$25.2m	Orange Juice	\$58.5m
Mushrooms.....	\$10.7m	Dried Tree Fruits.....	\$50.0m
Nuts	\$433.3m	Processed Vegetables	\$582.2m
Cashews.....	\$185.8m	Potatoes.....	\$183.3m
Walnuts	\$42.3m	Tomatoes.....	\$153.1m
Hazelnuts.....	\$38.0m	Beans.....	\$65.7m

Total Exports

For the year ending June 2017, Australia exported **\$2.23 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.*

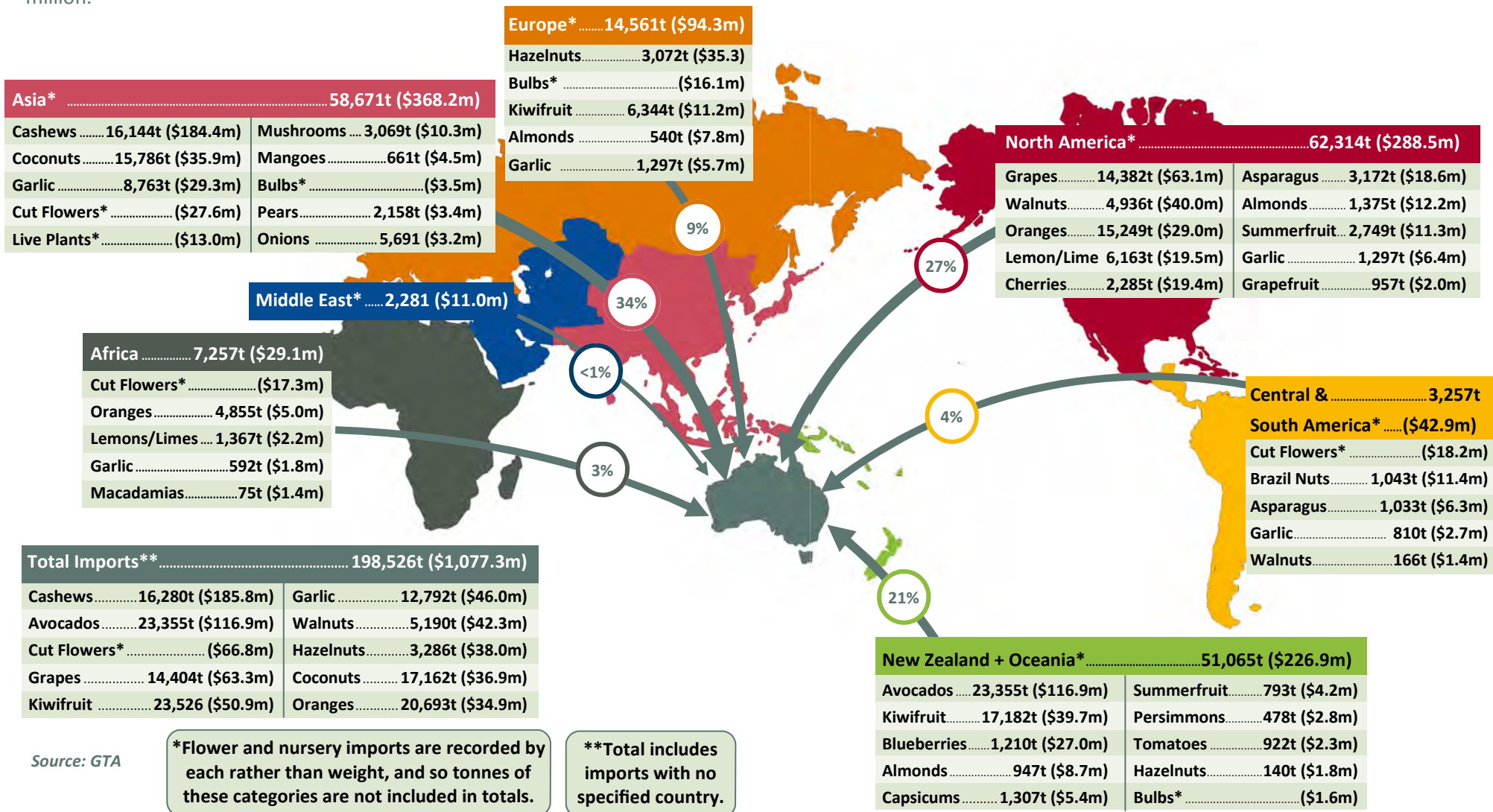


Sources: GTA; (Freshlogic Analysis)

Fresh Fruit	\$927.7m	Other Fresh Horticulture	\$16.9m
Table Grapes	\$372.6m	Cut Flowers.....	\$9.7m
Oranges.....	\$223.7m	Live Plants.....	\$6.9m
Mandarins.....	\$78.7m	Bulbs.....	\$0.2m
Fresh Vegetables	\$250.6m	Processed Fruit	\$149.7m
Carrots.....	\$90.7m	Dried Grapes and Grape Juice.....	\$37.0m
Asparagus.....	\$30.9m	Olives and Olive Oil.....	\$23.6m
Potatoes.....	\$27.8m	Orange Juice.....	\$7.9m
Nuts	\$815.3m	Processed Vegetables	\$65.6m
Almonds.....	\$461.2m	Tomatoes.....	\$20.9m
Macadamias.....	\$291.0m	Potatoes.....	\$16.8m
Walnuts.....	\$15.9m	Cabbage.....	\$5.5m

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 7 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*466,310t (\$1,382.6m)	
Grapes.....96,936t (\$340.7m)	Cherries.....2,079t (\$38.4m)
Macadamias...26,308t (\$241.3m)	Summerfruit...9,519t (\$35.8m)
Almonds.....31,390t (\$199.7m)	Carrots.....39,995t (\$35.5m)
Oranges.....135,529t (\$186.0m)	Asparagus.....5,028t (\$30.7m)
Mandarins.....28,670t (\$56.9m)	Potatoes.....32,414t (\$24.2m)

Middle East104,076t (\$175.5m)	
Carrots.....60,272t (\$52.5m)	Strawberries...1,231t (\$10.9m)
Almonds.....2,584t (\$21.5m)	Mandarins.....4,183t (\$6.7m)
Grapes.....5,614t (\$18.0m)	Macadamias.....250t (\$5.9m)
Summerfruit...3,975t (\$13.3m)	Muskmelons.....2,794t (\$5.5m)
Oranges.....11,152t (\$11.2m)	Watermelons...3,374t (\$5.3m)

Africa2,123t (\$10.3m)
Almonds.....907t (\$6.9m)
Seed Potato.....1,101t (\$1.3m)

Total Exports**670,060t (\$2,010.5m)	
Almonds.....66,311t (\$461.1m)	Mandarins.....40,870t (\$78.7m)
Grapes.....106,666t (\$372.7m)	Summerfruit...13,975t (\$51.4m)
Macadamias...28,378t (\$291.0m)	Cherries.....2,461t (\$43.3m)
Oranges.....164,043t (\$223.8m)	Strawberries.....3,881t (\$32.6m)
Carrots.....102,937t (\$90.8m)	Asparagus.....5,056 (\$30.9m)

Source: GTA

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

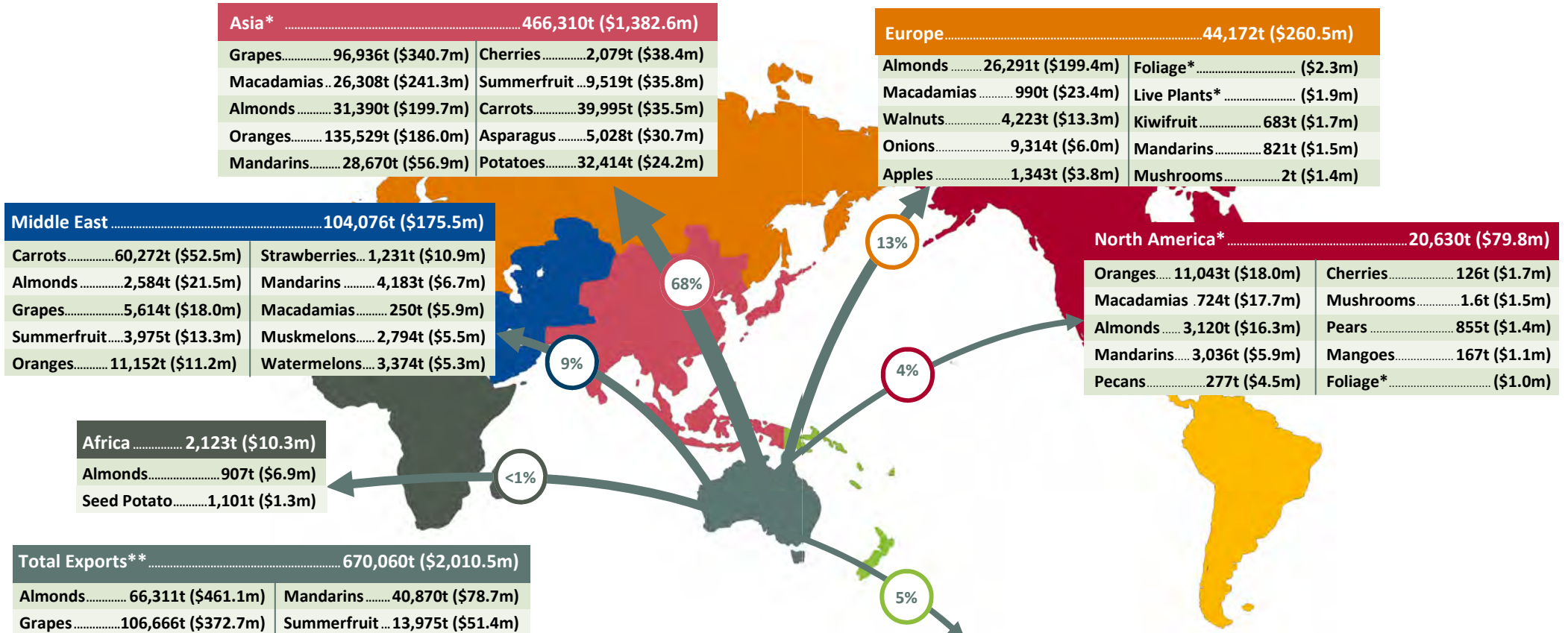
**Total includes exports with no specified country.

The relative share of the **value** of exports to each of the 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 export information with no specified country, and therefore may exceed the sum of the individual regions.

Europe44,172t (\$260.5m)	
Almonds.....26,291t (\$199.4m)	Foliage*.....(\$2.3m)
Macadamias.....990t (\$23.4m)	Live Plants*.....(\$1.9m)
Walnuts.....4,223t (\$13.3m)	Kiwifruit.....683t (\$1.7m)
Onions.....9,314t (\$6.0m)	Mandarins.....821t (\$1.5m)
Apples.....1,343t (\$3.8m)	Mushrooms.....2t (\$1.4m)

North America*20,630t (\$79.8m)	
Oranges.....11,043t (\$18.0m)	Cherries.....126t (\$1.7m)
Macadamias...724t (\$17.7m)	Mushrooms.....1.6t (\$1.5m)
Almonds.....3,120t (\$16.3m)	Pears.....855t (\$1.4m)
Mandarins...3,036t (\$5.9m)	Mangoes.....167t (\$1.1m)
Pecans.....277t (\$4.5m)	Foliage*.....(\$1.0m)

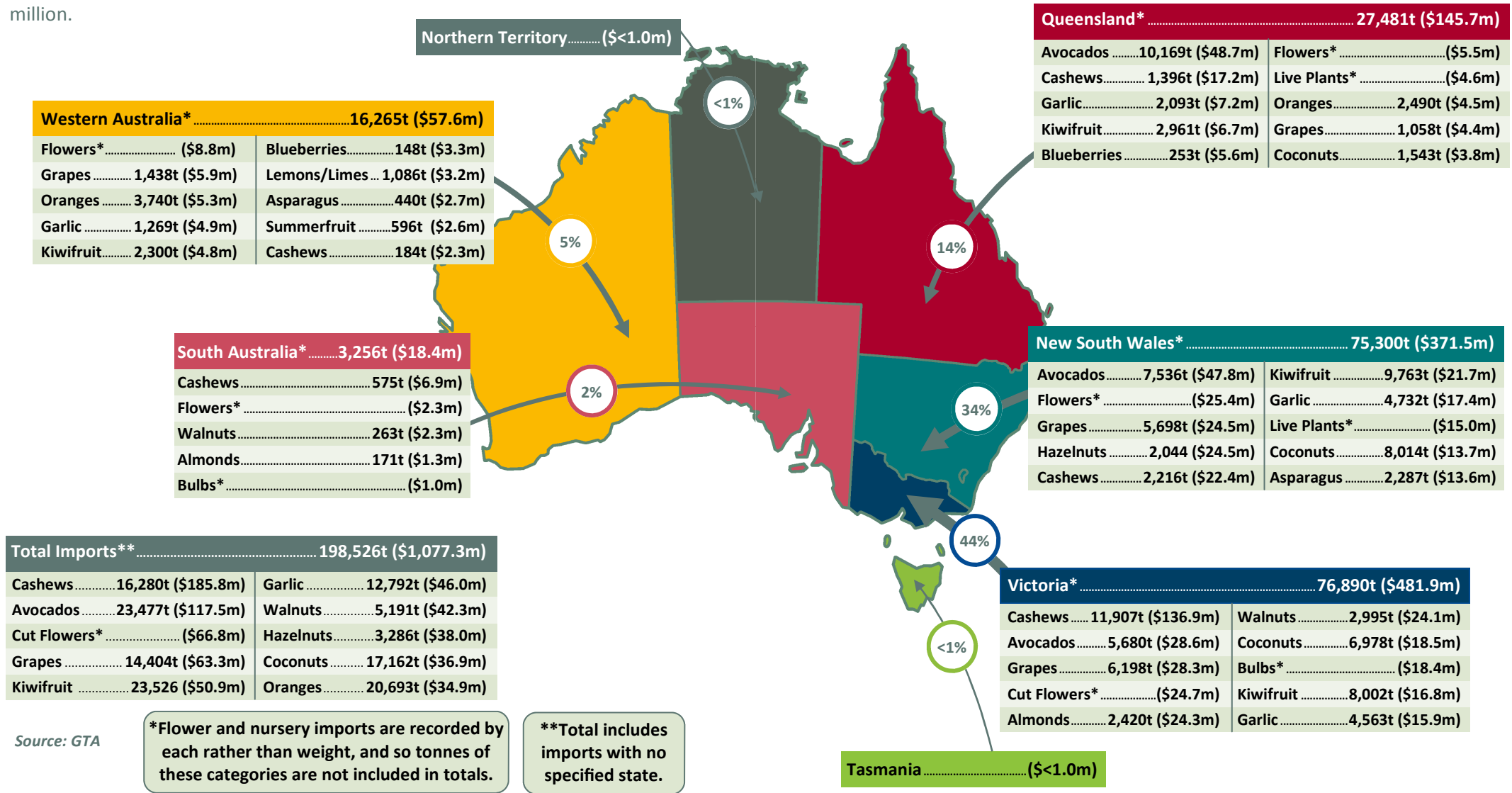
New Zealand + Oceania37,440t (\$106.4m)	
Almonds.....1,893t (\$16.3m)	Muskmelons...3,369t (\$5.7m)
Grapes.....3,843t (\$13.1m)	Pears.....3,579t (\$5.5m)
Oranges.....6,114t (\$8.4m)	Strawberries.....586t (\$5.3m)
Mandarins.....4,158t (\$7.6m)	Mangoes.....829t (\$3.2m)
Beans.....1,549t (\$6.6m)	Watermelons...2,641t (\$2.9m)



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.

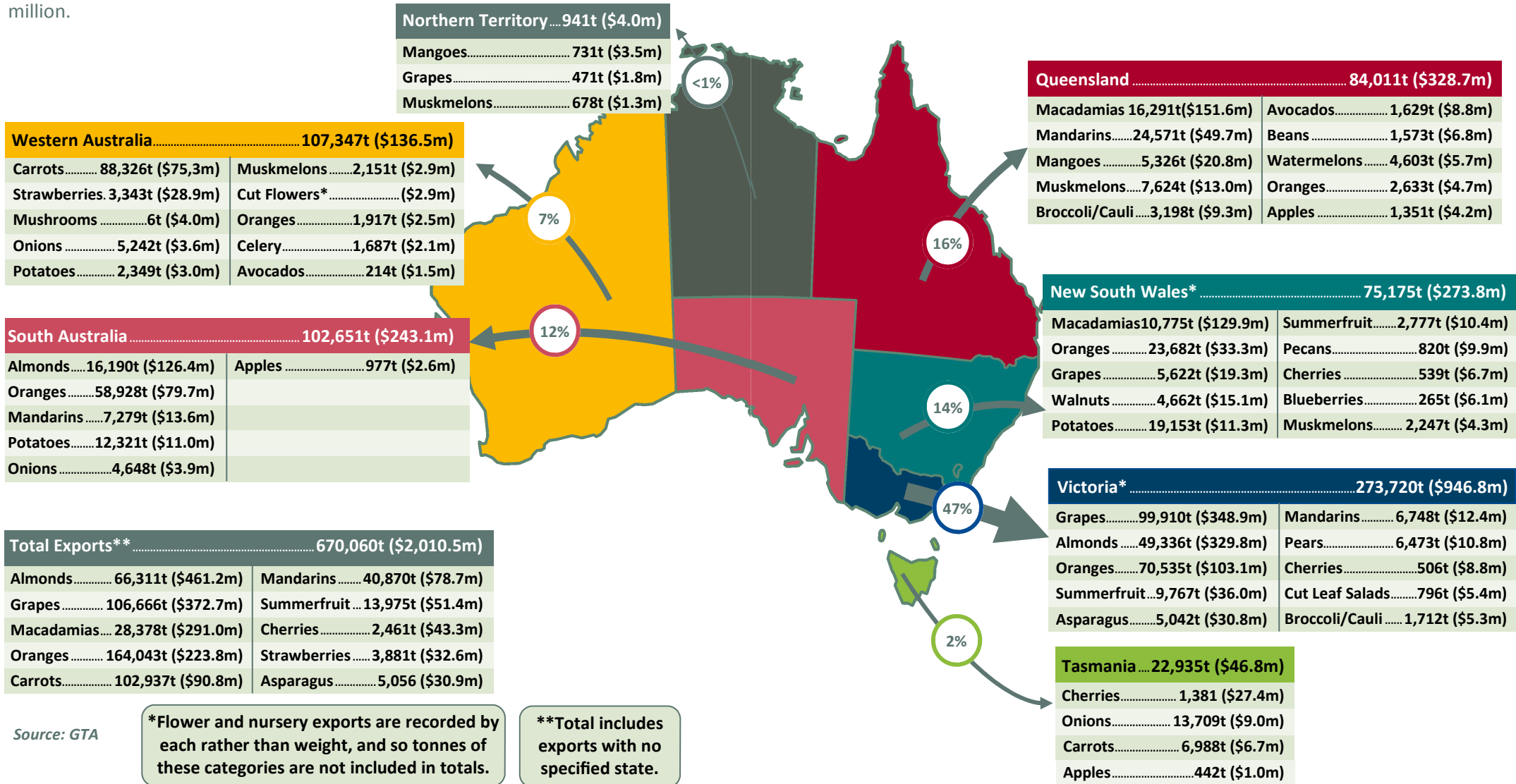
The relative share of the **value** of imports to each of the states is also profiled in the circle associated with each region. Note that the total value and volume for all states (located at the bottom left of the page) includes import information with no specified state, and therefore may exceed the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



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 2017.

Year Ending June 2017	Production (t)	Year Ending June 2017	Production (t)
All Horticultural Products	6,337,978	Passionfruit	5,004
All Fruit	2,649,093	Papaya/Pawpaw	18,381
Apples	319,686	Persimmons	2,516
Avocados	65,992	Pears	108,065
Bananas	413,660	Pineapples	77,482
Berries - Combined	106,582	Summerfruit - Combined	126,177
Blueberries	9,553	Apricots	7,163
Rubus Berries	5,946	Nectarines/Peaches	92,017
Strawberries	91,083	Plums	26,997
Cherries	11,012	Table Grapes	171,637
Citrus - Combined	708,121	Processing Fruit Combined*	261,639
Grapefruit	12,647	Dried Grapes	67,500
Lemons/Limes	41,436	Prunes*	12,500
Mandarins	147,648	Other Dried Tree Fruit*	1,528
Oranges	506,391	Canned Fruit*	50,111
Custard Apples	1,764	Olives	130,000
Kiwifruit	9,791	Other Fruit	7,686
Lychees	2,419	All Vegetables	3,502,673
Mangoes	61,474	Artichokes	374
Melons - Combined	231,146	Asparagus	8,033
Muskmelons	67,020	Beans	29,039
Watermelons	164,126	Beetroot	14,053
Nashi	3,000	Broccoli/Baby Broccoli	75,231

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 2017	Production (t)	Year Ending June 2017	Production (t)
Brussels Sprouts	5,734	Potatoes	1,333,418
Cabbage	71,126	Pumpkins	120,981
Capsicums	73,488	Sweet Corn	61,333
Carrots	318,198	Sweetpotatoes	87,847
Cauliflower	67,704	Tomatoes	426,398
Celery	62,100	Zucchini	37,580
Chillies	2,213	Other Vegetables	23,801
Cucumbers	87,776	All Nuts	186,211
Eggplant	9,028	Almonds (Inshell)**	115,429
Eng.Spinach/Silverbeet/Kale	7,205	Chestnuts (Inshell)	1,200
Fresh Herbs - Combined	11,367	Hazelnuts (Inshell)**	600
Fennel	1,140	Macadamias (Inshell)	46,450
Parsley and Other Herbs	10,227	Pecans (Inshell)	2,600
Garlic	1,786	Pistachios (Inshell)	1,600
Ginger	7,405	Walnuts (Inshell)	13,000
Leafy Asian Vegetables	29,067	Other Nuts (Inshell)	5,332
Leafy Salad Vegetables	52,356	Other Horticulture	N/A
Leeks	9,051	Cut Flowers	N/A
Head Lettuce	128,225	Nursery	N/A
Mushrooms	67,089	Turf	N/A
Onions	237,635		
Parsnips	3,301		
Peas	32,733		

*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 2017.

Year Ending June 2017	Production (\$m)	Year Ending June 2017	Production (\$m)
All Horticultural Products	\$12,910.0	Passionfruit	\$19.0
All Fruit	\$4,859.5	Papaya/Pawpaw	\$31.6
Apples	\$497.2	Persimmons	\$10.5
Avocados	\$374.5	Pears	\$122.9
Bananas	\$514.4	Pineapples	\$54.2
Berries - Combined	\$866.6	Summerfruit - Combined	\$386.1
Blueberries	\$193.6	Apricots	\$29.9
Rubus Berries	\$166.5	Nectarines/Peaches	\$281.4
Strawberries	\$506.5	Plums	\$74.8
Cherries	\$120.7	Table Grapes	\$534.4
Citrus - Combined	\$724.2	Processing Fruit Combined*	\$177.4
Grapefruit	\$17.4	Dried Grapes	\$27.0
Lemons/Limes	\$105.2	Prunes*	\$8.4
Mandarins	\$268.1	Other Dried Tree Fruit*	\$0.5
Oranges	\$333.5	Canned Fruit*	\$16.3
Custard Apples	\$7.1	Olives	\$125.1
Kiwifruit	\$20.4	Other Fruit	\$19.6
Lychees	\$26.7	All Vegetables	\$4,291.6
Mangoes	\$195.7	Artichokes	\$0.9
Melons - Combined	\$172.4	Asparagus	\$52.9
Muskmelons	\$76.1	Beans	\$77.8
Watermelons	\$96.4	Beetroot	\$10.7
Nashi	\$8.9	Broccoli/Baby Broccoli	\$228.6

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 2017	Production (\$m)	Year Ending June 2017	Production (\$m)
Brussels Sprouts	\$17.7	Potatoes	\$717.0
Cabbage	\$45.0	Pumpkins	\$76.2
Capsicums	\$172.4	Sweet Corn	\$66.6
Carrots	\$231.3	Sweetpotatoes	\$87.7
Cauliflower	\$52.9	Tomatoes	\$645.2
Celery	\$59.6	Zucchini	\$70.9
Chillies	\$9.4	Other Vegetables	\$80.0
Cucumbers	\$182.1	All Nuts	\$922.6
Eggplant	\$14.9	Almonds	\$553.6
Eng.Spinach/Silverbeet/Kale	\$20.4	Chestnuts	\$11.8
Fresh Herbs - Combined	\$155.5	Hazelnuts	\$2.0
Fennel	\$2.3	Macadamias	\$255.5
Parsley and Other Herbs	\$153.3	Pecans	\$18.5
Garlic	\$7.9	Pistachios	\$19.0
Ginger	\$19.8	Walnuts	\$33.0
Leafy Asian Vegetables	\$67.7	Other Nuts	\$29.3
Leafy Salad Vegetables	\$304.3	Other Horticulture	\$2,836.2
Leeks	\$20.4	Cut Flowers	\$275.6
Head Lettuce	\$154.5	Nursery*	\$2,290.0
Mushrooms	\$396.6	Turf	\$270.6
Onions	\$174.2		
Parsnips	\$10.7		
Peas	\$59.7		

**Note: The nursery production value is from 2015/16 and 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 2017.

Year Ending June 2017	Fresh Export Volume (t)	Year Ending June 2017	Fresh Export Volume (t)
All Horticultural Products	670,060	Passionfruit	
All Fruit	378,524	Papaya/Pawpaw	57
Apples	4,950	Persimmons	143
Avocados	2,315	Pears	7,131
Bananas		Pineapples	
Berries - Combined	4,244	Summerfruit - Combined	13,975
Blueberries	356	Apricots	431
Rubus Berries	7	Nectarines/Peaches	9,023
Strawberries	3,881	Plums	4,521
Cherries	2,462	Table Grapes	106,666
Citrus - Combined	208,041	Processing Fruit Combined*	
Grapefruit	1,197	Dried Grapes*	
Lemons/Limes	1,724	Prunes*	
Mandarins	40,871	Other Dried Tree Fruit*	
Oranges	164,044	Canned Fruit*	
Custard Apples	88	Olives*	
Kiwifruit	944	Other Fruit	649
Lychees	411	All Vegetables	192,412
Mangoes	7,120	Artichokes	7
Melons - Combined	19,327	Asparagus	5,056
Muskmelons	13,211	Beans	1,594
Watermelons	6,116	Beetroot	367
Nashi		Broccoli/Baby Broccoli	5,010

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2017	Fresh Export Volume (t)	Year Ending June 2017	Fresh Export Volume (t)
Brussels Sprouts	248	Potatoes	34,782
Cabbage	2,624	Pumpkins	2,086
Capsicums	346	Sweet Corn	
Carrots	102,937	Sweetpotatoes	866
Cauliflower	683	Tomatoes	530
Celery	3,872	Zucchini	
Chillies	3	Other Vegetables	4,447
Cucumbers	105	All Nuts*	99,124
Eggplant	10	Almonds*	66,311
Eng.Spinach/Silverbeet/Kale	166	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	23
Fennel		Macadamias*	23,903
Parsley and Other Herbs		Pecans*	911
Garlic	94	Pistachios*	127
Ginger	17	Walnuts*	4,750
Leafy Asian Vegetables		Other Nuts*	3,099
Leafy Salad Vegetables	1,313	Other Horticulture	N/A
Leeks	176	Cut Flowers	N/A
Head Lettuce	194	Nursery	N/A
Mushrooms	62	Turf	N/A
Onions	24,798		
Parsnips			
Peas	18		

*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 2017.

Year Ending June 2017	Fresh Export Value (\$m)
All Horticultural Products	\$2,010.5
All Fruit	\$927.7
Apples	\$12.7
Avocados	\$12.5
Bananas	
Berries - Combined	\$41.2
Blueberries	\$8.5
Rubus Berries	\$0.2
Strawberries	\$32.6
Cherries	\$43.3
Citrus - Combined	\$310.3
Grapefruit	\$2.5
Lemons/Limes	\$4.8
Mandarins	\$78.7
Oranges	\$223.8
Custard Apples	\$0.5
Kiwifruit	\$3.0
Lychees	\$5.6
Mangoes	\$29.7
Melons - Combined	\$31.9
Muskmelons	\$23.4
Watermelons	\$8.5
Nashi	

Year Ending June 2017	Fresh Export Value (\$m)
Passionfruit	
Papaya/Pawpaw	\$0.2
Persimmons	\$0.7
Pears	\$12.2
Pineapples	
Summerfruit - Combined	\$51.4
Apricots	\$1.7
Nectarines/Peaches	\$33.9
Plums	\$15.9
Table Grapes	\$372.7
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	\$0.3
All Vegetables	\$250.6
Artichokes	<\$0.1
Asparagus	\$31.0
Beans	\$6.9
Beetroot	\$0.8
Broccoli/Baby Broccoli	\$15.3

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2017	Fresh Export Value (\$m)
Brussels Sprouts	\$1.1
Cabbage	\$4.6
Capsicums	\$1.3
Carrots	\$90.8
Cauliflower	\$1.7
Celery	\$6.2
Chillies	<\$0.1
Cucumbers	\$0.4
Eggplant	<\$0.1
Eng.Spinach/Silverbeet/Kale	\$1.4
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	\$0.4
Ginger	\$0.2
Leafy Asian Vegetables	
Leafy Salad Vegetables	\$8.4
Leeks	\$0.8
Head Lettuce	\$1.3
Mushrooms	\$4.9
Onions	\$18.1
Parsnips	
Peas	\$0.1

Year Ending June 2017	Fresh Export Value (\$m)
Potatoes	\$27.8
Pumpkins	\$3.2
Sweet Corn	
Sweetpotatoes	\$1.8
Tomatoes	\$2.5
Zucchini	
Other Vegetables	\$19.7
All Nuts*	\$815.3
Almonds*	\$461.2
Chestnuts*	
Hazelnuts*	\$0.3
Macadamias*	\$291.0
Pecans*	\$11.0
Pistachios*	\$1.8
Walnuts*	\$15.9
Other Nuts*	\$34.1
Other Horticulture	\$16.9
Cut Flowers	\$9.7
Nursery	\$7.2
Turf	

*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 2017.

Year Ending June 2017	Fresh Import Volume (t)
All Horticultural Products	198,526
All Fruit	122,951
Apples	1,053
Avocados	23,355
Bananas	
Berries - Combined	1,211
Blueberries	1,211
Rubus Berries	
Strawberries	
Cherries	2,295
Citrus - Combined	30,104
Grapefruit	1,291
Lemons/Limes	7,812
Mandarins	298
Oranges	20,694
Custard Apples	
Kiwifruit	23,527
Lychees	
Mangoes	1,111
Melons - Combined	
Muskmelons	
Watermelons	
Nashi	

Year Ending June 2017	Fresh Import Volume (t)
Passionfruit	
Papaya/Pawpaw	61
Persimmons	492
Pears	2,158
Pineapples	
Summerfruit - Combined	3,577
Apricots	794
Nectarines/Peaches	2,235
Plums	548
Table Grapes	14,405
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	19,610
All Vegetables	35,609
Artichokes	
Asparagus	4,249
Beans	717
Beetroot	3
Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2017	Fresh Import Volume (t)
Brussels Sprouts	
Cabbage	1
Capsicums	1,374
Carrots	10
Cauliflower	
Celery	<0.1
Chillies	14
Cucumbers	1
Eggplant	
Eng.Spinach/Silverbeet/Kale	
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	12,792
Ginger	120
Leafy Asian Vegetables	
Leafy Salad Vegetables	4
Leeks	24
Head Lettuce	
Mushrooms	3,151
Onions	8,337
Parsnips	
Peas	782

Year Ending June 2017	Fresh Import Volume (t)
Potatoes	
Pumpkins	1
Sweet Corn	
Sweetpotatoes	124
Tomatoes	932
Zucchini	
Other Vegetables	2,972
All Nuts*	39,966
Almonds*	2,902
Chestnuts*	
Hazelnuts*	3,286
Macadamias*	81
Pecans*	
Pistachios*	2,340
Walnuts*	5,191
Other Nuts*	26,166
Other Horticulture	N/A
Cut Flowers	N/A
Nursery	N/A
Turf	N/A

*Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 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 2017.

Year Ending June 2017	Fresh Import Value (\$m)	Year Ending June 2017	Fresh Import Value (\$m)
All Horticultural Products	\$1,077.3	Passionfruit	
All Fruit	\$413.7	Papaya/Pawpaw	\$0.2
Apples	\$2.4	Persimmons	\$2.8
Avocados	\$116.9	Pears	\$3.4
Bananas		Pineapples	
Berries - Combined	\$27.1	Summerfruit - Combined	\$15.5
Blueberries	\$27.1	Apricots	\$4.2
Rubus Berries		Nectarines/Peaches	\$8.8
Strawberries		Plums	\$2.6
Cherries	\$19.5	Table Grapes	\$63.3
Citrus - Combined	\$60.6	Processing Fruit Combined*	
Grapefruit	\$2.5	Dried Grapes*	
Lemons/Limes	\$22.3	Prunes*	
Mandarins	\$0.8	Other Dried Tree Fruit*	
Oranges	\$35.0	Canned Fruit*	
Custard Apples		Olives*	
Kiwifruit	\$50.9	<i>Other Fruit</i>	\$45.4
Lychees		All Vegetables	\$125.2
Mangoes	\$5.7	Artichokes	
Melons - Combined		Asparagus	\$25.2
Muskmelons		Beans	\$0.7
Watermelons		Beetroot	<\$0.1
Nashi		Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2017	Fresh Import Value (\$m)	Year Ending June 2017	Fresh Import Value (\$m)
Brussels Sprouts		Potatoes	
Cabbage	<\$0.1	Pumpkins	<\$0.1
Capsicums	\$5.4	Sweet Corn	
Carrots	<\$0.1	Sweetpotatoes	\$0.4
Cauliflower		Tomatoes	\$2.3
Celery	<\$0.1	Zucchini	
Chillies	\$0.2	<i>Other Vegetables</i>	\$25.3
Cucumbers	<\$0.1	All Nuts*	\$433.3
Eggplant		Almonds*	\$29.0
Eng.Spinach/Silverbeet/Kale		Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	\$38.0
Fennel		Macadamias*	\$0.4
Parsley and Other Herbs		Pecans*	
Garlic	\$46.0	Pistachios*	\$32.3
Ginger	\$0.6	Walnuts*	\$42.3
Leafy Asian Vegetables		<i>Other Nuts*</i>	\$291.2
Leafy Salad Vegetables	<\$0.1	Other Horticulture	\$105.1
Leeks	<\$0.1	Cut Flowers	\$66.8
Head Lettuce	<\$0.1	Nursery	\$38.3
Mushrooms	\$10.7	Turf	
Onions	\$5.8		
Parsnips			
Peas	\$2.4		

*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 2017.

Year Ending June 2017	Fresh Supply (t)	Year Ending June 2017	Fresh Supply (t)
All Horticultural Products	3,944,107	Passionfruit	4,688
All Fruit	1,746,427	Papaya/Pawpaw	18,130
Apples	223,234	Persimmons	2,827
Avocados	82,716	Pears	58,595
Bananas	412,423	Pineapples	45,897
Berries - Combined	90,626	Summerfruit - Combined	97,164
Blueberries	9,500	Apricots	6,270
Rubus Berries	5,469	Nectarines/Peaches	76,400
Strawberries	75,657	Plums	14,493
Cherries	10,321	Table Grapes	79,376
Citrus - Combined	309,546	Processing Fruit Combined*	
Grapefruit	12,208	Dried Grapes*	
Lemons/Limes	43,797	Prunes*	
Mandarins	104,180	Other Dried Tree Fruit*	
Oranges	149,361	Canned Fruit*	
Custard Apples	1,676	Olives*	
Kiwifruit	32,373	Other Fruit	10,931
Lychees	2,007	All Vegetables	2,125,792
Mangoes	52,017	Artichokes	367
Melons - Combined	208,880	Asparagus	7,226
Muskmelons	52,494	Beans	28,163
Watermelons	156,386	Beetroot	5,232
Nashi	3,000	Broccoli/Baby Broccoli	66,500

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 2017	Fresh Supply (t)	Year Ending June 2017	Fresh Supply (t)
Brussels Sprouts	4,471	Potatoes	428,613
Cabbage	57,653	Pumpkins	115,145
Capsicums	70,193	Sweet Corn	27,619
Carrots	195,710	Sweetpotatoes	84,547
Cauliflower	61,430	Tomatoes	242,119
Celery	57,310	Zucchini	36,916
Chillies	1,713	Other Vegetables	21,727
Cucumbers	83,096	All Nuts	71,888
Eggplant	8,439	Almonds	24,749
Eng.Spinach/Silverbeet/Kale	6,512	Chestnuts	1,200
Fresh Herbs - Combined	10,941	Hazelnuts	3,720
Fennel	1,107	Macadamias	1,326
Parsley and Other Herbs	9,834	Pecans	812
Garlic	9,900	Pistachios	3,662
Ginger	3,932	Walnuts	9,058
Leafy Asian Vegetables	29,067	Other Nuts	27,360
Leafy Salad Vegetables	42,140	Other Horticulture	N/A
Leeks	8,898	Cut Flowers	N/A
Head Lettuce	128,031	Nursery*	N/A
Mushrooms	68,414	Turf	N/A
Onions	203,335		
Parsnips	3,205		
Peas	7,229		

*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 2017.

Year Ending June 2017	Wholesale Value (\$m)	Year Ending June 2017	Wholesale Value (\$m)
All Horticultural Products	\$13,221.4	Passionfruit	\$22.3
All Fruit	\$4,929.3	Papaya/Pawpaw	\$37.1
Apples	\$554.5	Persimmons	\$14.1
Avocados	\$534.2	Pears	\$128.5
Bananas	\$623.4	Pineapples	\$47.7
Berries - Combined	\$1,005.6	Summerfruit - Combined	\$406.5
Blueberries	\$255.1	Apricots	\$37.6
Rubus Berries	\$194.6	Nectarines/Peaches	\$303.0
Strawberries	\$555.8	Plums	\$65.9
Cherries	\$126.3	Table Grapes	\$312.8
Citrus - Combined	\$571.6	Processing Fruit Combined*	
Grapefruit	\$20.0	Dried Grapes*	
Lemons/Limes	\$144.2	Prunes*	
Mandarins	\$236.7	Other Dried Tree Fruit*	
Oranges	\$170.6	Canned Fruit*	
Custard Apples	\$7.9	Olives*	
Kiwifruit	\$77.0	<i>Other Fruit</i>	\$52.2
Lychees	\$25.9	All Vegetables	\$4,572.0
Mangoes	\$200.6	Artichokes	\$1.0
Melons - Combined	\$170.8	Asparagus	\$75.9
Muskmelons	\$66.0	Beans	\$86.9
Watermelons	\$104.8	Beetroot	\$10.3
Nashi	\$10.5	Broccoli/Baby Broccoli	\$252.7

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 2017	Wholesale Value (\$m)	Year Ending June 2017	Wholesale Value (\$m)
Brussels Sprouts	\$19.4	Potatoes	\$500.0
Cabbage	\$47.5	Pumpkins	\$86.2
Capsicums	\$204.3	Sweet Corn	\$70.7
Carrots	\$179.8	Sweetpotatoes	\$101.3
Cauliflower	\$60.0	Tomatoes	\$732.5
Celery	\$63.8	Zucchini	\$83.3
Chillies	\$10.8	<i>Other Vegetables</i>	\$59.3
Cucumbers	\$213.2	All Nuts	\$674.0
Eggplant	\$17.4	Almonds	\$216.6
Eng.Spinach/Silverbeet/Kale	\$22.4	Chestnuts	\$13.9
Fresh Herbs - Combined	\$182.4	Hazelnuts	\$43.7
Fennel	\$2.7	Macadamias	\$28.0
Parsley and Other Herbs	\$179.7	Pecans	\$16.2
Garlic	\$74.2	Pistachios	\$51.1
Ginger	\$21.5	Walnuts	\$70.0
Leafy Asian Vegetables	\$79.7	<i>Other Nuts</i>	\$234.6
Leafy Salad Vegetables	\$343.2	Other Horticulture	\$3,046.1
Leeks	\$23.3	Cut Flowers	\$370.9
Head Lettuce	\$180.5	<i>Nursery*</i>	<i>\$2,404.5</i>
Mushrooms	\$482.8	Turf	\$270.6
Onions	\$193.2		
Parsnips	\$12.6		
Peas	\$57.9		

**Note: The nursery wholesale value is from 2015/16 and 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

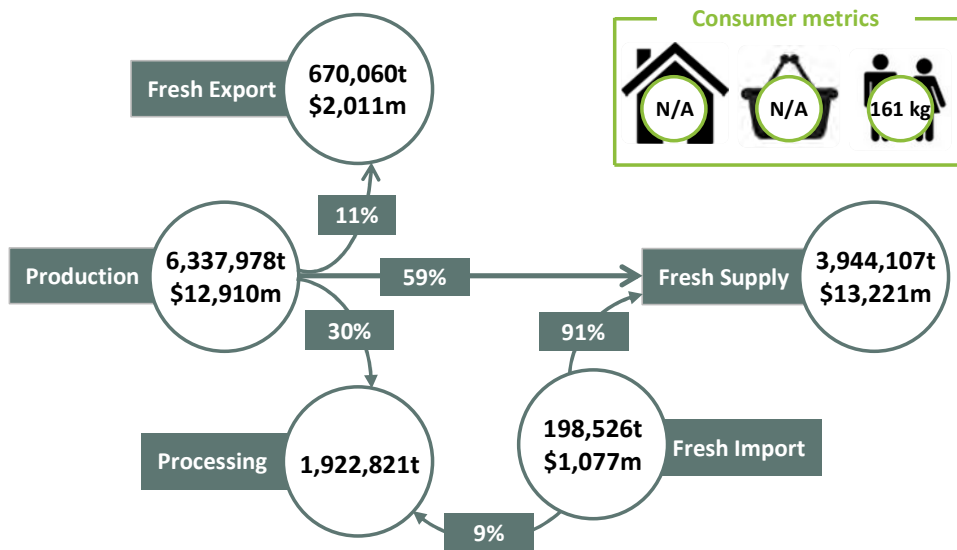
Pages 48-51 profile total horticultural production and trade. It combines information on fruit, vegetables, nuts and other horticultural categories (cut flowers, nursery and turf).



For the year ending June 2017:

- **6.34 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 **\$12.9 billion** while the wholesale value of the fresh supply was **\$13.2 billion**.
- The supply per capita was **161 kg**, based on the volume supplied.

All Fresh Horticulture Supply Chain—Year Ending June 2017



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

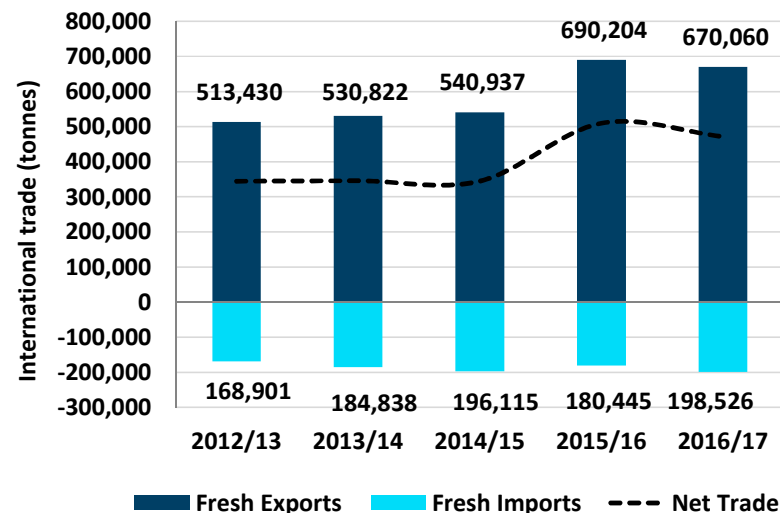


Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,137,500	6,382,295	+4%	6,337,978	>-1%
Production (\$m)	\$11,852.3	\$12,325.1	+4%	\$12,910.0	+5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	540,937	690,204	+28%	670,060	-3%
Fresh Export Value (\$m)	\$ 1,554.7	\$ 2,116.4	+36%	\$ 2,010.5	-5%
Fresh Import Volume (t)	196,115	180,445	-8%	198,526	+10%
Fresh Import Value (\$m)	\$ 968.9	\$ 1,013.3	+5%	\$ 1,077.3	+6%
Fresh Supply (t)	3,808,763	3,896,234	+2%	3,944,107	+1%
Fresh Supply Wholesale Value (\$m)	\$12,447.2	\$12,366.9	>-1%	\$13,221.4	+7%
Supply per Capita (kg)	160.15	161.60	<1%	160.91	>-1%

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

All Fresh Horticulture International Trade

Australia is a net exporter of fresh horticultural products. For the year ending June 2017 Australia exported **670,060 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.



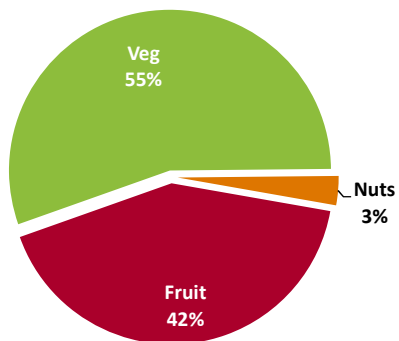
Source: GTA



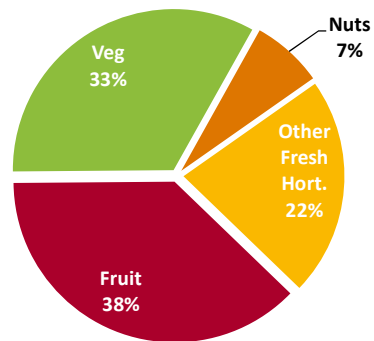
Production

The charts below profile the share of total Australian production of all horticultural categories during the year ending June 2017. 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 - 6,337,978 t



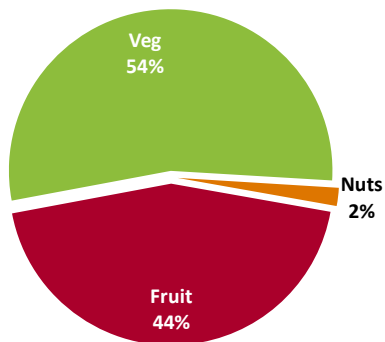
Value of Production - \$12,910.0 m



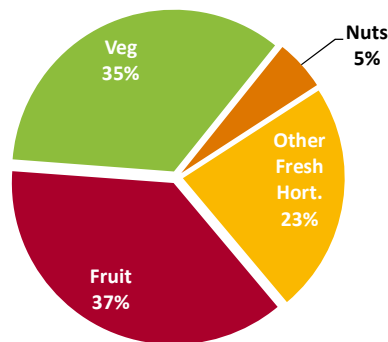
Fresh supply

The charts below profile the share of the total fresh supply of all horticultural categories during the year ending June 2017.

Fresh Supply Volume - 3,944,107 t



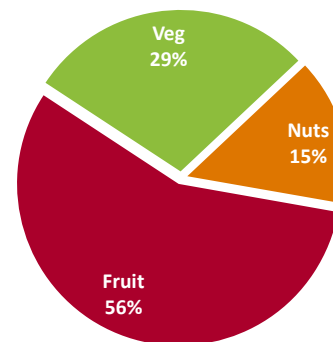
Wholesale Value - \$13,221.4 m



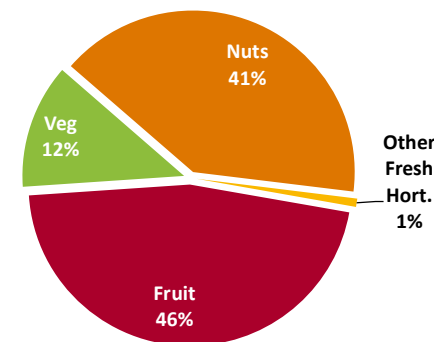
Fresh exports

The charts below profile the share of total Australian fresh exports of all horticultural categories during the year ending June 2017.

Fresh Export Volume - 670,060 t



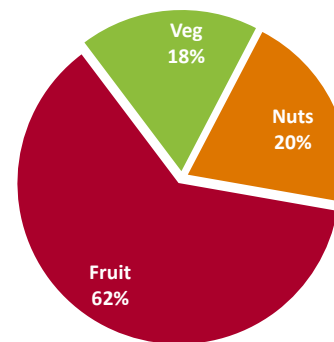
Fresh Export Value - \$2,010.5 m



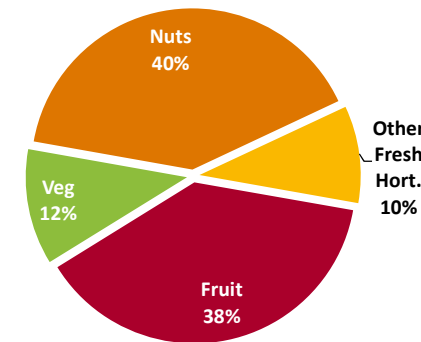
Fresh imports

The charts below profile the share of total Australian fresh imports of all horticultural categories during the year ending June 2017.

Fresh Import Volume - 198,526 t



Fresh Import Value - \$1,077.3 m





All Fresh Fruit Overview

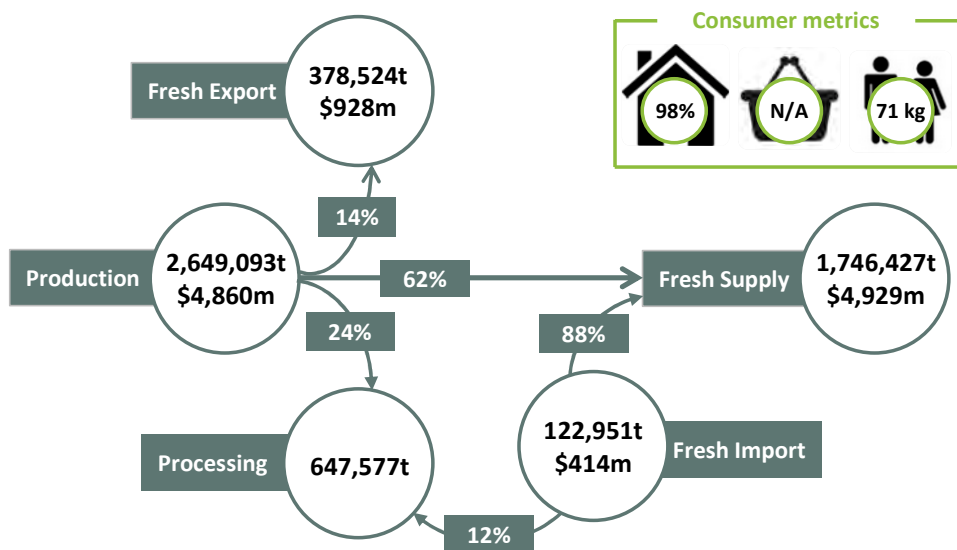
Pages 52-53 profile total fruit production and trade. It combines information on all fruit categories covered in this handbook.

For the year ending June 2017:

- **2.65 million tonnes** of fruit was produced in Australia.
- The value of production was **\$4.86 billion** while the wholesale value of the fresh supply was **\$4.93 billion**.
- **98%** of Australian households purchased fruit.
- The supply per capita was **71 kg**, based on the volume supplied.



All Fresh Fruit Supply Chain—Year Ending June 2017



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



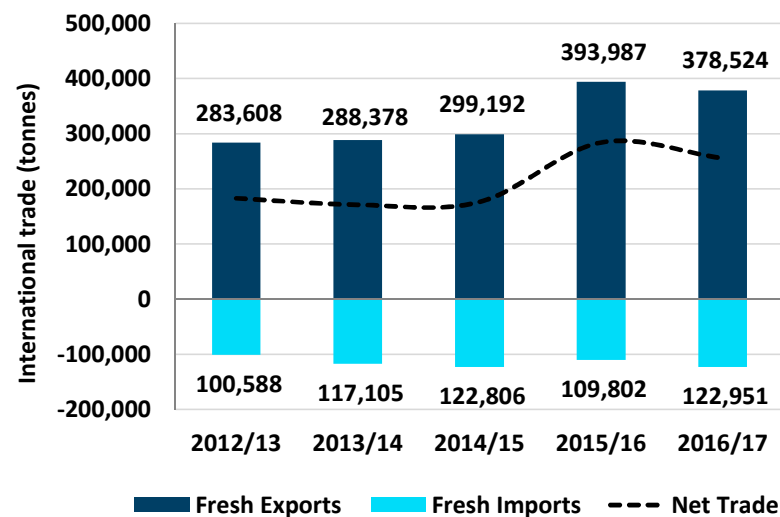
Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,437,701	2,613,549	+7%	2,649,093	+1%
Production (\$m)	\$ 4,320.6	\$ 4,490.5	+4%	\$ 4,859.5	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	299,192	393,987	+32%	378,524	-4%
Fresh Export Value (\$m)	\$ 627.9	\$ 936.6	+49%	\$ 927.7	>-1%
Fresh Import Volume (t)	122,806	109,802	-11%	122,951	+12%
Fresh Import Value (\$m)	\$ 387.2	\$ 362.9	-6%	\$ 413.7	+14%
Fresh Supply (t)	1,637,044	1,701,735	+4%	1,746,427	+3%
Fresh Supply Wholesale Value (\$m)	\$ 4,559.8	\$ 4,412.2	-3%	\$ 4,929.3	+12%
Supply per Capita (kg)	68.83	70.58	+3%	71.25	<1%

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

All Fresh Fruit International Trade

Australia is a net exporter of fresh fruit. For the year ending June 2017, Australia exported **378,524 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

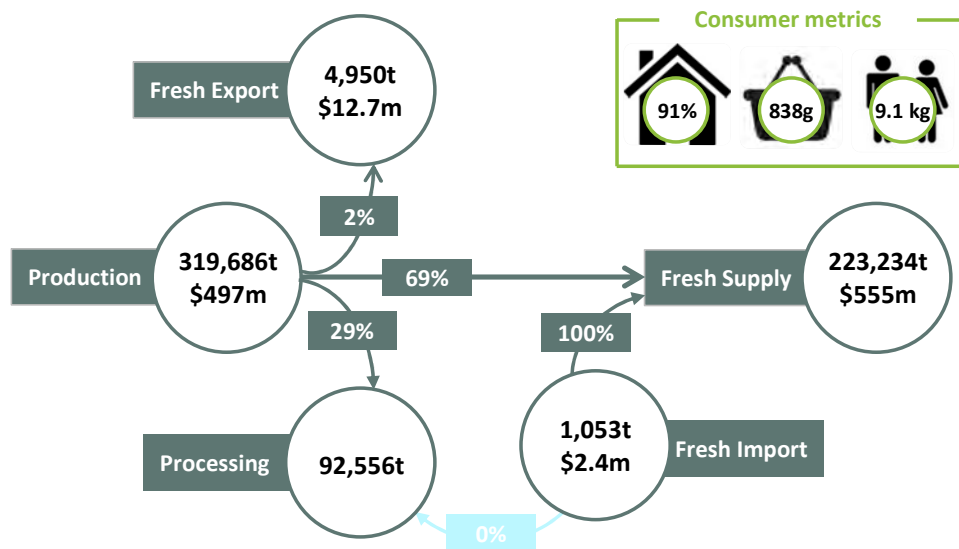
Apple production occurs across all states in Australia. Harvesting typically occurs between February and May. Year-round availability is made possible through the use of controlled atmosphere technology.



For the year ending June 2017:

- **319,686t** was produced with **29%** sent to be processed.
- The value of production was **\$497.2 m** while the wholesale value of the fresh supply was **\$554.5 m**.
- **91%** of Australian households purchased apples, buying an average of **838 g** per shopping trip.
- The supply per capita was **9.1 kg**, based on the volume supplied.

Fresh Apple Supply Chain — Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	311,758	316,758	+2%	319,686	<1%
Production (\$m)	\$ 507.4	\$ 441.5	-13%	\$ 497.2	+13%
Producing Trees (000 Trees)	10,178	11,367	+12%	-	-
Fresh Export Volume (t)	2,134	4,665	>100%	4,950	+6%
Fresh Export Value (\$m)	\$ 5.9	\$ 12.4	>100%	\$ 12.7	+3%
Fresh Import Volume (t)	883	619	-30%	1,053	+70%
Fresh Import Value (\$m)	\$ 2.6	\$ 1.6	-36%	\$ 2.4	+49%
Fresh Supply (t)	216,997	219,811	+1%	223,234	+2%
Fresh Supply Wholesale Value (\$m)	\$ 571.6	\$ 490.2	-14%	\$ 554.5	+13%
Supply per Capita (kg)	9.12	9.12	>-1%	9.11	>-1%

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

Major Apple Production Areas

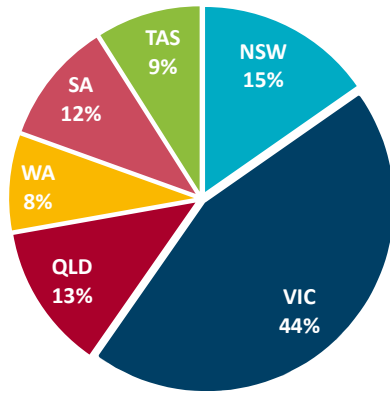
Apples are grown in all Australian states. The major producing areas include **Stanthorpe** in Queensland; **Batlow** and **Orange** in New South Wales; the **Goulburn Valley**, **Gippsland**, **Yarra Valley** and the **Mornington Peninsula** in Victoria; the **Huon Valley** and **North West** Tasmania;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



Source: APAL



2016/17 Fresh Apple Production by State



Source: APAL

Fresh Apple Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	48,912	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	141,941	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	39,961	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	26,534	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	33,567	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	28,772	High	High	High	High	High	High	High	High	High	High	High	High
Imports	1,053	None	None	None	None	None	None	None	None	None	None	None	None
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 **37%** 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 **20%** of fresh production.



Seasonality by Apple Variety

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

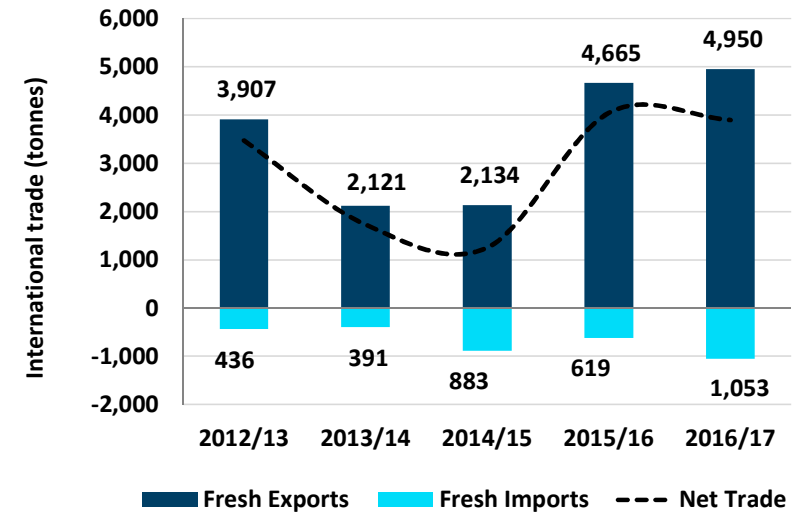
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	84,038	High	High	High	High	High	High	High	High	High	High	High	High
Royal Gala	52,240	High	High	High	High	High	High	High	High	High	High	High	High
Granny Smith	45,426	High	High	High	High	High	High	High	High	High	High	High	High
Sundowner	12,492	High	High	High	High	High	High	High	High	High	High	High	High
Other	32,934	High	High	High	High	High	High	High	High	High	High	High	High
Processing	92,556	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low									

Source: APAL

Fresh Apple International Trade

Australia has traditionally been a net exporter of fresh apples, typically exporting between 2,000-4,000 tonnes per year. For the year ending June 2017, Australia exported **4,950 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

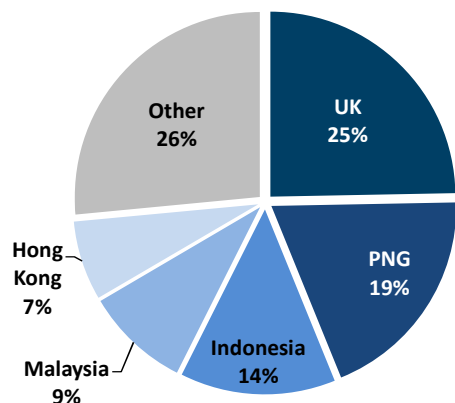


Source: GTA



For the year ending June 2017, **25%** of exported fresh apples were sent to the United Kingdom, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Victoria	406	401	585	Victoria	474	1,755	2,008
New South Wales	316	150	432	Queensland	1,100	1,271	1,351
Queensland	68	69	36	South Australia	229	823	977
South Australia	73	-	-	Tasmania	245	365	442
Western Australia	20	-	-	New South Wales	29	187	105
Other	-	-	< 0.5	Other	58	263	66
TOTAL	883	619	1,053	TOTAL	2,134	4,665	4,950

Fresh Apple Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
China	474	357	698	UK	234	699	1,222
New Zealand	277	262	355	PNG	942	1,067	949
Other	132	-	-	Indonesia	230	434	671
TOTAL	883	619	1,053	Malaysia	77	411	453
				Hong Kong	46	297	343
				Other	606	1,757	1,312
				TOTAL	2,134	4,665	4,950

Source: GTA



Processed Apple International Trade

For the year ending June 2017, an additional **779 tonnes** of dried apples were imported, while **67 tonnes** were exported. Australia also imported **25.2 mega litres** of apple juice, while exporting **3.2 mega litres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 57.



Source: GTA





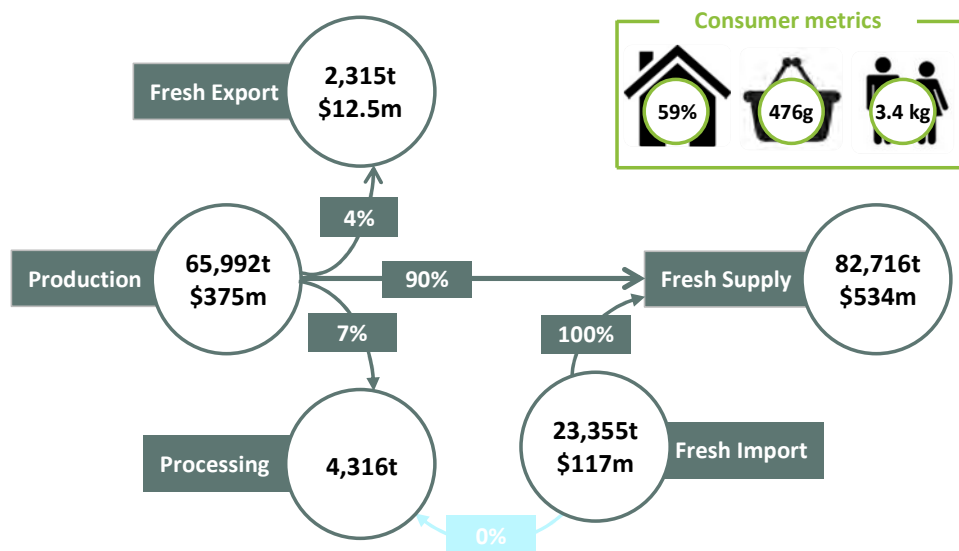
Fresh Avocado Overview

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 2017:



- **65,992 t** was produced.
- The value of production was **\$374.5 m** while the wholesale value of the fresh supply was **\$534.2 m**.
- **59%** of Australian households purchased avocados, buying an average of **476g** per shopping trip.
- The supply per capita was **3.4 kg**, based on the volume supplied.

Fresh Avocado Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	57,595	66,716	+16%	65,992	-1%
Production (\$m)	\$ 331.4	\$ 412.3	+24%	\$ 374.5	-9%
Producing Trees (000 Trees)	1,251	1,322	+6%	-	-
Fresh Export Volume (t)	1,287	1,546	+20%	2,315	+50%
Fresh Export Value (\$m)	\$ 6.4	\$ 9.2	+43%	\$ 12.5	+37%
Fresh Import Volume (t)	19,626	13,108	-33%	23,355	+78%
Fresh Import Value (\$m)	\$ 85.9	\$ 63.6	-26%	\$ 116.9	+84%
Fresh Supply (t)	73,629	75,608	+3%	82,716	+9%
Fresh Supply Wholesale Value (\$m)	\$ 451.0	\$ 514.5	+14%	\$ 534.2	+4%
Supply per Capita (kg)	3.10	3.14	+1%	3.37	+8%

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

Major Avocado Production Areas

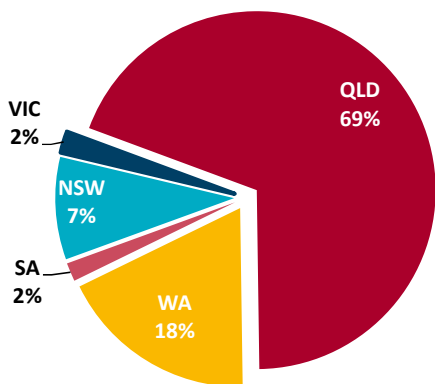
Avocado production occurs predominantly in Queensland during the winter months, particularly the **Atherton Tablelands** and **Bundaberg/Childers** regions, and Western Australia during the summer, particularly in **Pemberton/Manjimup**. Smaller volumes are produced in New South Wales and the Tri-State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



Source: AAL



2016/17 Fresh Avocado Production by State



Source: AAL

Fresh Avocado Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	45,608	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
Western Australia	11,875	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
New South Wales	6,108	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
Victoria	1,296	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
South Australia	1,105	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
Imports	23,355	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
Availability legend		High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None

Source: AAL; GTA

Main Avocado Varieties

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

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

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

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.

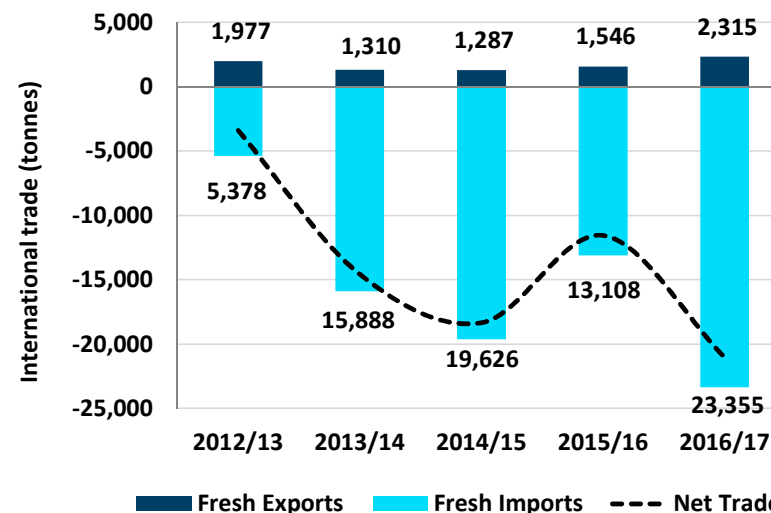
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	52,963	High	High	High	High	High	High	High	High	High	High	High	High
Shepard	10,860								High	High	High		
Other	2,169	High	High	High	High					High	High	High	High
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

Source: AAL

Fresh Avocado International Trade

Australia has traditionally been a net importer of fresh avocados, typically importing between 15,000-20,000 tonnes per year from New Zealand. For the year ending June 2017, Australia imported **23,355 tonnes**, and exported **2,315 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

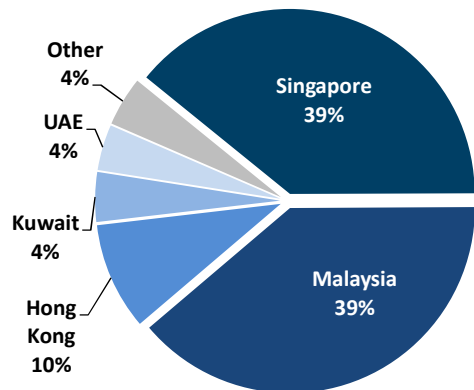


Source: GTA



For the year ending June 2017, both Singapore and Malaysia received **39%** of exported fresh avocados each, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Queensland	7,196	5,372	10,169	Queensland	781	959	1,629
New South Wales	8,145	5,180	7,517	Victoria	59	119	251
Victoria	4,276	2,497	5,578	Western Australia	401	404	215
Western Australia	10	59	91	New South Wales	41	59	172
Other	< 0.5	-	0	Northern Territory	-	-	13
TOTAL	19,626	13,108	23,355	Other	5	6	35
				TOTAL	1,287	1,546	2,315

Fresh Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New Zealand	19,626	13,108	23,355	Singapore	765	792	905
TOTAL	19,626	13,108	23,355	Malaysia	454	591	899
				Hong Kong	23	87	217
				Kuwait	2	7	100
				UAE	4	7	93
				Other	39	62	100
				TOTAL	1,287	1,546	2,315

Source: GTA





Fresh Banana Overview

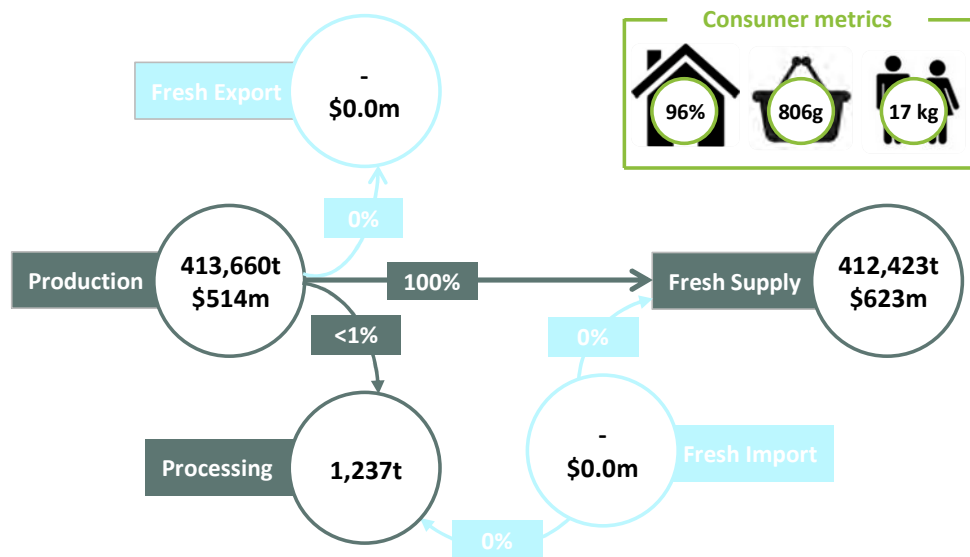
As a tropical fruit, banana production predominantly occurs in the North of Australia, in Queensland, Northern NSW, the Northern Territory and Western Australia. There is minimal international trade of fresh bananas, with some limited trade of dried banana products.



For the year ending June 2017:

- **413,660 t** was produced.
- The value of production was **\$514.4 m** while the wholesale value of the fresh supply was **\$623.4 m**.
- **96%** of Australian households purchased bananas, buying an average of **806 g** per shopping trip.
- The supply per capita was **17 kg**, based on the volume supplied.

Fresh Banana Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	370,989	395,878	+7%	413,660	+4%
Production (\$m)	\$ 588.5	\$ 420.6	-29%	\$ 514.4	+22%
Production area (Ha)	10,936	15,610	+43%	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	369,876	394,694	+7%	412,423	+4%
Fresh Supply Wholesale Value (\$m)	\$ 713.2	\$ 509.7	-29%	\$ 623.4	+22%
Supply per Capita (kg)	15.55	16.37	+5%	16.83	+3%

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

*Note: Production value has been modified from the quoted values published in the previous edition of the handbook (2015/16 edition).

Major Banana Production Areas

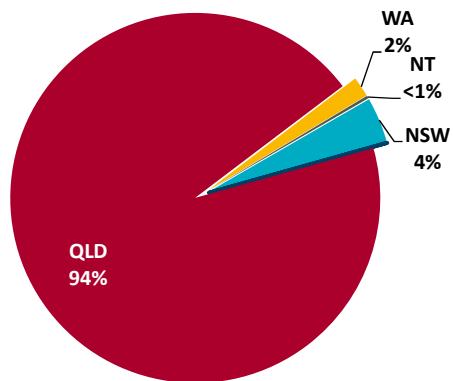
Bananas are produced in the northern states. The major producing areas include **Tully** and **Innisfail**, **Lakeland** and **Bundaberg** in Queensland; **Darwin** in the Northern Territory; the **Coffs Harbour** region in Northern New South Wales; and the **Carnarvon** region in Western Australia.



Source: ABGC



2016/17 Fresh Banana Production by State



Source: ABGC

Fresh Banana Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	388,840	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	7,239	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	1,034	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	16,546	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Medium	Low	Low	None	None	None	None	None	None

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 **95%** of fresh production.

Lady Finger, a shorter and straighter banana. Lady Finger bananas accounted for **4%** of fresh production.

Other varieties, including Red bananas and Plantains, accounted for **<1%** of fresh production.

Seasonality by Banana Variety

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

Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	392,977	High	High	High	High	High	High	High	High	High	High	High	High
Lady Fingers	17,787	High	High	High	High	High	High	High	High	High	High	High	High
Other	2,896	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Medium	Low	Low	None	None	None	None	None	None

Source: ABGC

Processed Banana International Trade

Australia has a limited amount of international trade in fresh bananas, with the little trade that does occur being dominated by dried banana products. For the year ending June 2017, **348 tonnes** of dried bananas were imported, while **133 tonnes** was exported.



Source: GTA





Fresh Berries Overview

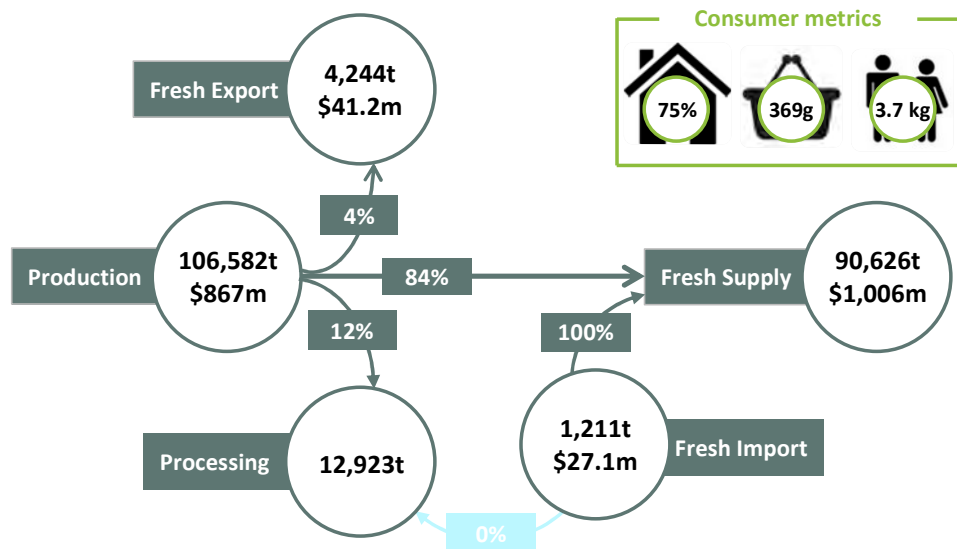
Pages 70-71 profile total berry production and trade. It combines information on blueberries, strawberries and rubus berries (such as raspberries and blackberries). The following pages profile each berry category in more detail.



For the year ending June 2017:

- **106,582 t** was produced.
- The value of production was **\$866.6 m** while the wholesale value of the fresh supply was **\$1,005.6 m**.
- **75%** of Australian households purchased fresh berries, buying an average of **369 g** per shopping trip.
- The supply per capita was **3.7 kg**, based on the volume supplied.

Fresh Berries Supply Chain—Year Ending June 2017



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



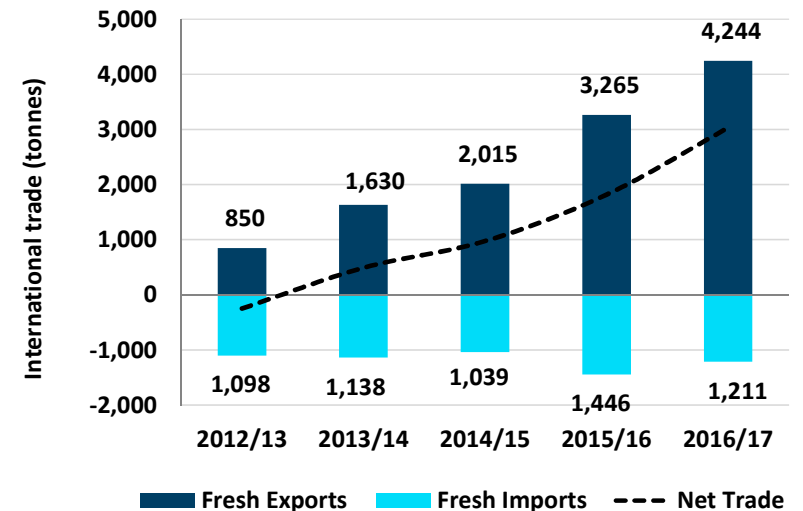
Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	87,543	84,709	-3%	106,582	+26%
Production (\$m)	\$ 679.0	\$ 658.9	-3%	\$ 866.6	+32%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	2,015	3,265	+62%	4,244	+30%
Fresh Export Value (\$m)	\$ 14.5	\$ 31.1	>100%	\$ 41.2	+32%
Fresh Import Volume (t)	1,039	1,446	+39%	1,211	-16%
Fresh Import Value (\$m)	\$ 18.6	\$ 29.9	+60%	\$ 27.1	-9%
Fresh Supply (t)	73,271	70,142	-4%	90,626	+29%
Fresh Supply Wholesale Value (\$m)	\$ 809.0	\$ 776.1	-4%	\$ 1,005.6	+30%
Supply per Capita (kg)	3.08	2.91	-6%	3.70	+27%

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 2017, Australia exported **4,244 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

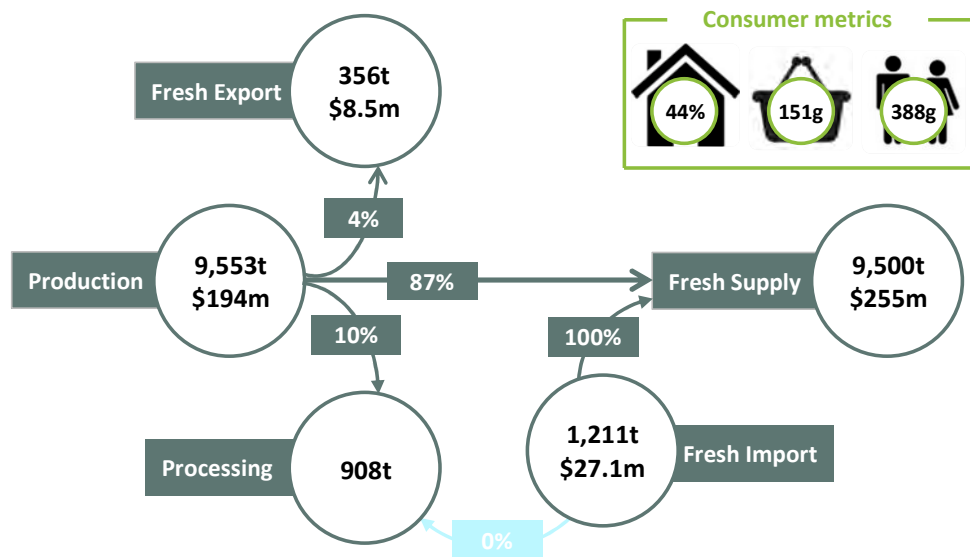
Blueberry production is centred in the northern New South Wales region of Coffs Harbour. The majority of the production in this region occurs over the summer months. A number of other blueberry production regions across Australia allow for close to year-round availability.



For the year ending June 2017:

- **9,553 t** was produced.
- The value of production was **\$193.6 m** while the wholesale value of the fresh supply was **\$255.1 m**.
- **44%** of Australian households purchased fresh blueberries, buying an average of **151 g** per shopping trip.
- The supply per capita of was **388 g**, based on the volume supplied.

Fresh Blueberries Supply Chain—Year Ending June 2017



Sources: Australian Blueberry Grower's Association (ABGA); ABS; AC; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	7,355	7,660	+4%	9,553	+25%	
Production (\$m)	\$ 155.5	\$ 149.6	-4%	\$ 193.6	+29%	
Production area (Ha)	1,125	1,250	+11%	1,375	+10%	
Fresh Export Volume (t)	103	254	>100%	356	+40%	
Fresh Export Value (\$m)	\$ 2.0	\$ 5.2	>100%	\$ 8.5	+62%	
Fresh Import Volume (t)	1,003	1,432	+43%	1,211	-15%	
Fresh Import Value (\$m)	\$ 18.4	\$ 29.8	+62%	\$ 27.1	-9%	
Fresh Supply (t)	7,525	7,939	+6%	9,500	+20%	
Fresh Supply Wholesale Value (\$m)	\$ 211.7	\$ 210.9	>-1%	\$ 255.1	+21%	
Supply per Capita (kg)	0.32	0.33	+4%	0.39	+18%	

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

Major Blueberry Production Areas

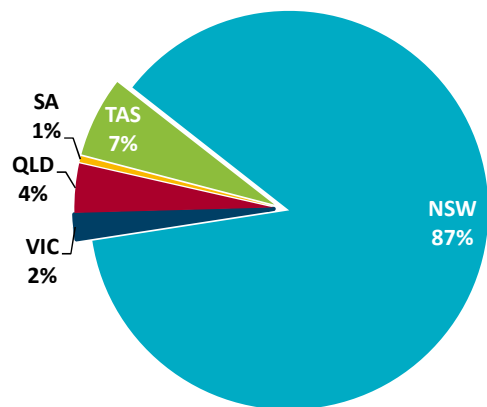
The majority of blueberries are produced in the northern New South Wales region of **Coffs Harbour**. Other production areas in Western Australia, South Australia, Queensland, Victoria and Tasmania allow the season to be extended to close to year round.



Source: ABGA



2016/17 Fresh Blueberries Production by State



Source: ABGA

Fresh Blueberries Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,311	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	382						Medium	Medium	Medium	Medium	Medium		
Tasmania	621						High	High	High	High	High		
Victoria	191						High	High	High	High	High		
South Australia	48						High	High	High	High	High	High	
Imports	1,211						High	High	High	High	High		
Availability legend		High	Medium	Low	None								

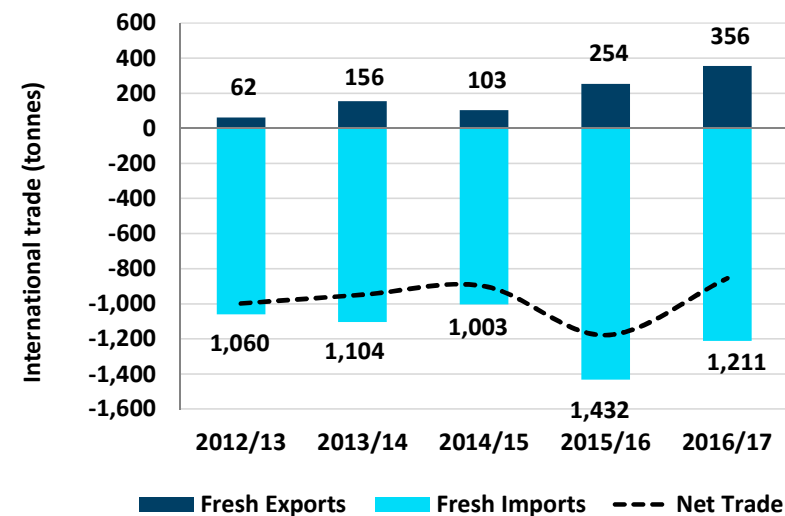
Source: ABGA

Fresh Blueberries International Trade

Australia has traditionally been a net importer of fresh blueberries, typically importing about 1,000 tonnes per year, with the majority of this volume coming from New Zealand. For the year ending June 2017, Australia imported **1,211 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

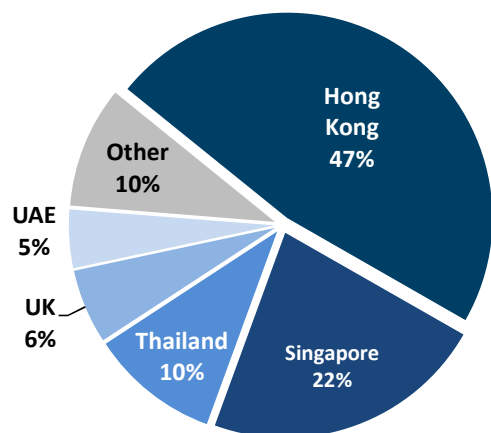


Source: GTA

For the year ending June 2017, **47%** of exported fresh blueberries were sent to Hong Kong, as profiled in the chart on the following page.



2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	582	595	570	New South Wales	81	184	265
Queensland	127	381	254	Queensland	13	64	80
Victoria	149	224	236	Victoria	3	6	6
Western Australia	144	233	149	Western Australia	-	< 0.5	3
South Australia	-	-	3	Tasmania	< 0.5	< 0.5	1
TOTAL	1,003	1,432	1,211	Other	6	< 0.5	< 0.5
				TOTAL	103	254	356

Fresh Blueberry Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New Zealand	999	1,432	1,211	Hong Kong	56	115	169
US	3	-	-	Singapore	16	83	79
Namibia	1	-	-	Thailand	9	20	36
Other	< 0.5	-	-	UK	-	11	21
TOTAL	1,003	1,432	1,211	UAE	1	1	16
				Other	21	23	34
				TOTAL	103	254	356

Source: GTA





Fresh Rubus Berries Overview

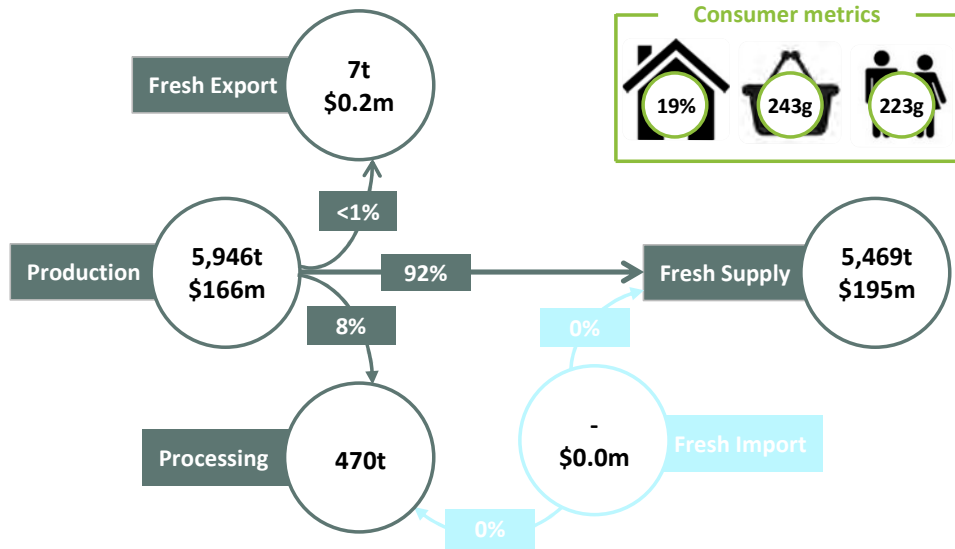
Rubus berries include raspberries, blackberries and other berries such as boysenberries and silvanberries. Production occurs all along the Eastern Seaboard of Australia, with the majority of production centred on Victoria and Tasmania.



For the year ending June 2017:

- **5,946 t** was produced.
- The value of production was **\$166.5 m** while the wholesale value of the fresh supply was **\$194.6 m**.
- **19%** of Australian households purchased fresh rubus berries, buying an average of **243 g** per shopping trip.
- The supply per capita was **223 g**, based on the volume of supply.

Fresh Rubus Berries Supply Chain—Year Ending June 2017



Sources: AC; CFVIWA; GTA; Raspberries and Blackberries Australia Inc. (RABA); MP & DD (Freshlogic Analysis)



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,166	4,974	+57%	5,946	+20%
Production (\$m)	\$ 103.4	\$ 127.6	+23%	\$ 166.5	+30%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	8	2	-72%	7	>100%
Fresh Export Value (\$m)	\$ 0.1	< \$0.1	-60%	\$ 0.2	>100%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	2,889	4,504	+56%	5,469	+21%
Fresh Supply Wholesale Value (\$m)	\$ 123.3	\$ 149.1	+21%	\$ 194.6	+31%
Supply per Capita (kg)	0.12	0.19	+54%	0.22	+19%

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

Major Rubus Berries Production Areas

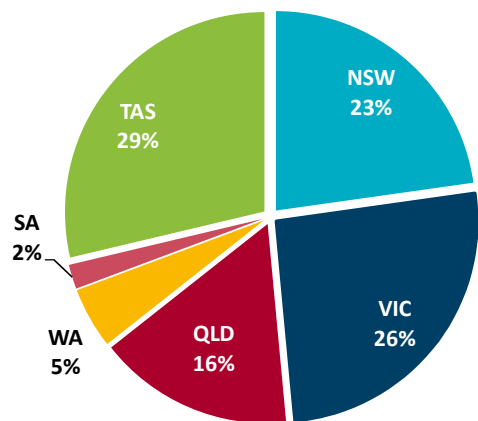
Major rubus berry producing regions include: **South East Queensland**; **North Coast, Central and Southern Tableland** regions in New South Wales; **Yarra Valley** in Victoria; **Northern & Southern Tasmania**; **Adelaide Hills** in South Australia; **Gin Gin** and the **Great Southern** region in Western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



Source: RABA



2016/17 Fresh Rubus Berries Production by State



Source: RABA

Fresh Rubus Berries Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,354	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Victoria	1,531	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Queensland	942	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Western Australia	294	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
South Australia	118	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Tasmania	1,707	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Availability legend		High	High	High	Medium	Medium	Low	Low	None	None	None	None	None

Source: RABA

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.

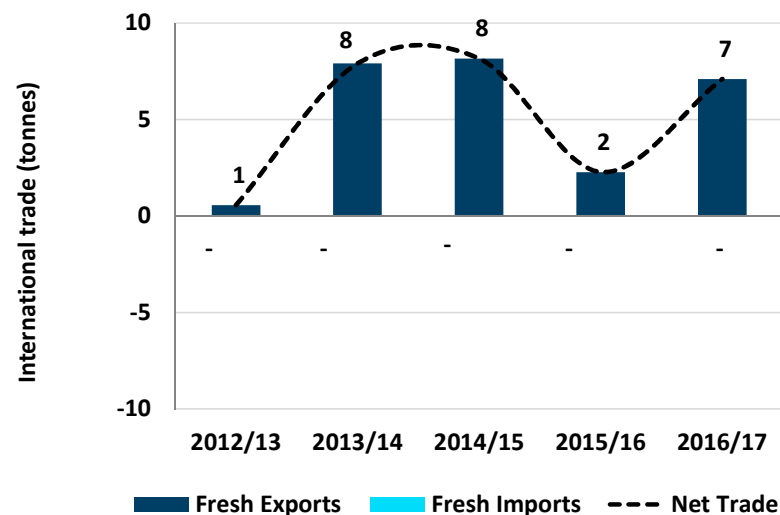
Type	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	5,054	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Blackberries	832	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Other	59	High	High	High	High	Medium	Medium	Low	Low	None	None	None	None
Availability legend		High	High	High	Medium	Medium	Low	Low	None	None	None	None	None

Source: RABA

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

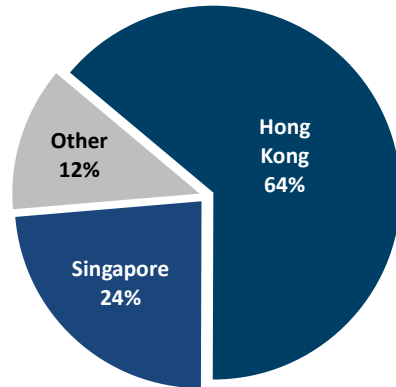


Source: GTA



For the year ending June 2017, **64%** of exported fresh rubus berries were sent to Hong Kong, as profiled in the chart below.

2016/17 Fresh Rubus Berries Exports by Country



Source: GTA

Fresh Rubus Berries Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2015	2016	2017
Queensland	1	1	5
New South Wales	7	<0.5	2
Victoria	<0.5	1	1
Tasmania	-	<0.5	<0.5
Other	<0.5	<0.5	<0.5
TOTAL	8	2	7

Fresh Rubus Berries Exports by Country

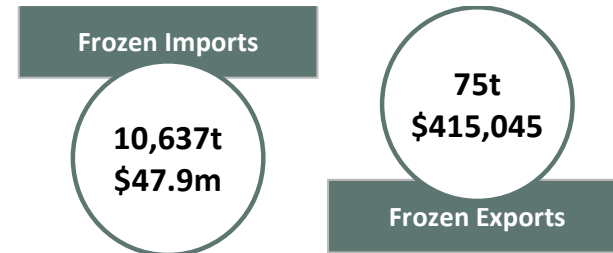
Exports by country (Tonnes)			
Year Ending June	2015	2016	2017
Hong Kong	<0.5	1	5
Singapore	6	<0.5	2
India	-	-	<0.5
New Caledonia	<0.5	-	<0.5
PNG	<0.5	<0.5	<0.5
Other	3	1	1
TOTAL	8	2	7

Source: GTA



Processed Rubus Berries International Trade

For the year ending June 2017, an additional **10,637 tonnes** of frozen rubus berries were imported, while **75 tonnes** were exported. These volumes have not been included in the fresh imports and exports profiled on page 81.



Source: GTA





Fresh Strawberries Overview

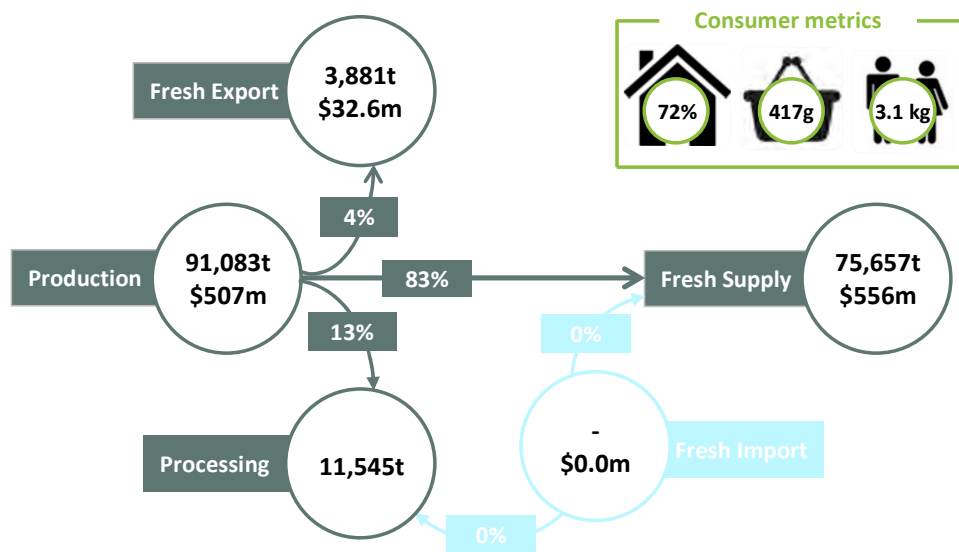
Strawberries are grown in most states in Australia. Year-round availability is made possible through the different regions.

For the year ending June 2017:

- **91,083 t** was produced with **13%** sent to be processed, predominantly in preserves.
- The value of production was **\$506.5 m** while the wholesale value of the fresh supply was **\$555.8 m**.
- **72%** of Australian households purchased fresh strawberries, buying an average of **417 g** per shopping trip.
- The supply per capita was **3.1 kg**, based on the volume supplied.



Fresh Strawberries Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	77,022	72,075	-6%	91,083	+26%
Production (\$m)	\$ 420.1	\$ 381.6	-9%	\$ 506.5	+33%
Production area (Ha)	2,240	1,995	-11%	-	-
Fresh Export Volume (t)	1,904	3,010	+58%	3,881	+29%
Fresh Export Value (\$m)	\$ 12.4	\$ 25.8	>100%	\$ 32.6	+26%
Fresh Import Volume (t)	36	14	-62%	-	-100%
Fresh Import Value (\$m)	\$ 0.2	< \$0.1	-81%	\$ -	-100%
Fresh Supply (t)	62,857	57,698	-8%	75,657	+31%
Fresh Supply Wholesale Value (\$m)	\$ 473.9	\$ 416.0	-12%	\$ 555.8	+34%
Supply per Capita (kg)	2.64	2.39	-9%	3.09	+29%

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

Major Strawberry Production Areas

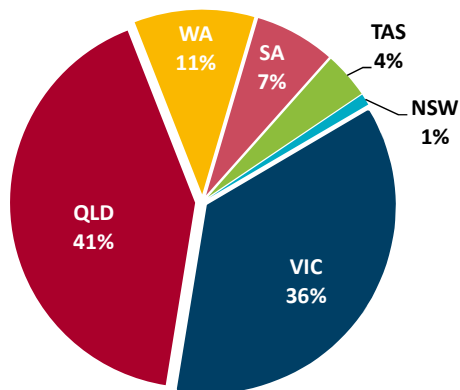
Strawberries are produced in almost all Australian states. The major producing areas include the **Yarra Valley** in Victoria; **Beerwah** in Queensland; **Camden** in New South Wales; the **Adelaide Hills** in South Australia; and **Wanneroo, Bullsbrook** and **Albany** in Western Australia.



Source: SAI



2016/17 Fresh Strawberries Production by State



Source: SAI

Fresh Strawberries Seasonality by State

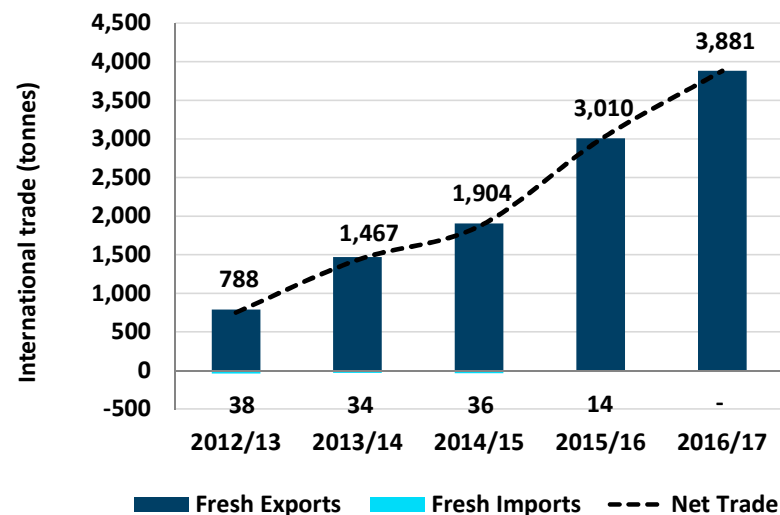
State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	32,790												
Queensland	37,799												
Western Australia	9,564												
South Australia	6,376												
Tasmania	3,643												
New South Wales	911												
Availability legend			High		Medium		Low						None

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 2017, Australia exported **3,881 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.

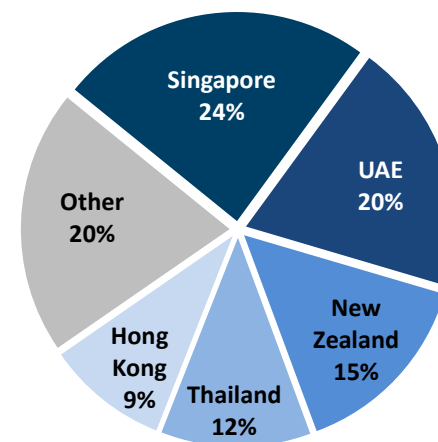
Net Fresh Strawberries International Trade



Source: GTA

For the year ending June 2017, **24%** of exported fresh strawberries were sent to Singapore, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Victoria	34	14	-	Western Australia	1,723	2,462	3,344
New South Wales	2	-	-	Queensland	158	467	447
Western Australia	< 0.5	-	-	New South Wales	4	11	34
Other	< 0.5	-	-	Victoria	16	16	31
TOTAL	36	14	-	Tasmania	-	30	6
				Other	3	24	18
				TOTAL	1,904	3,010	3,881

Fresh Strawberries Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
China	13	14	-	Singapore	563	814	940
New Zealand	23	-	-	UAE	322	590	757
Other	< 0.5	-	-	New Zealand	365	491	574
TOTAL	36	14	-	Thailand	134	224	450
				Hong Kong	159	197	366
				Other	361	693	793
				TOTAL	1,904	3,010	3,881

Source: GTA

Processed Strawberries International Trade

For the year ending June 2017, an additional **5,191 tonnes** of frozen strawberries were imported, while **49 tonnes** were exported. Australia also imported **426 tonnes** of preserved strawberries, while exporting **2 tonnes** of preserved strawberries.



Source: GTA





Fresh Cherries Overview

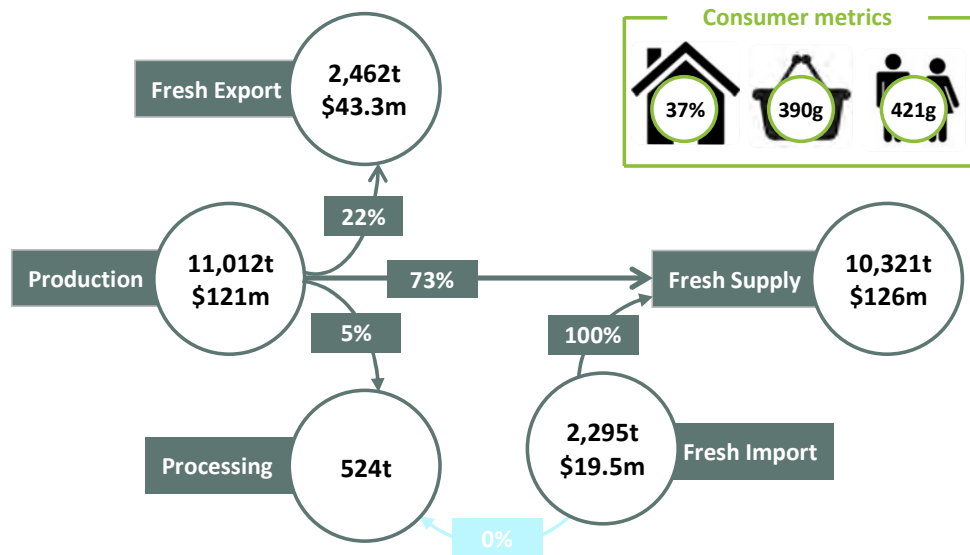
Cherries are produced during the summer months, with the majority of production occurring in the southern states of Australia.

For the year ending June 2017:

- **11,012 t** was produced with **5%** sent to be processed, predominantly in preserves.
- The value of production was **\$120.7 m** while the wholesale value of the fresh supply was **\$126.3 m**.
- **37%** of Australian households purchased fresh cherries, buying an average of **390 g** per shopping trip.
- The supply per capita was **421 g**, based on the volume supplied.



Fresh Cherries Supply Chain—Year Ending June 2017



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

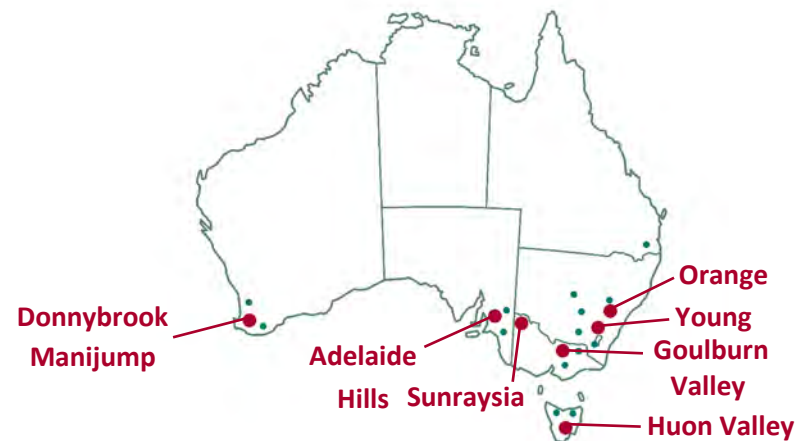


Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	15,945	18,584	+17%	11,012	-41%	
Production (\$m)	\$ 122.1	\$ 164.2	+34%	\$ 120.7	-26%	
Producing Trees (000 Trees)	1,775	1,886	+6%	-	-	
Fresh Export Volume (t)	3,551	5,593	+58%	2,462	-56%	
Fresh Export Value (\$m)	\$ 47.9	\$ 76.1	+59%	\$ 43.3	-43%	
Fresh Import Volume (t)	2,598	1,505	-42%	2,295	+52%	
Fresh Import Value (\$m)	\$ 18.6	\$ 11.9	-36%	\$ 19.5	+63%	
Fresh Supply (t)	13,764	13,444	-2%	10,321	-23%	
Fresh Supply Wholesale Value (\$m)	\$ 116.8	\$ 130.8	+12%	\$ 126.3	-3%	
Supply per Capita (kg)	0.58	0.56	-4%	0.42	-24%	

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

Major Cherry Production Areas

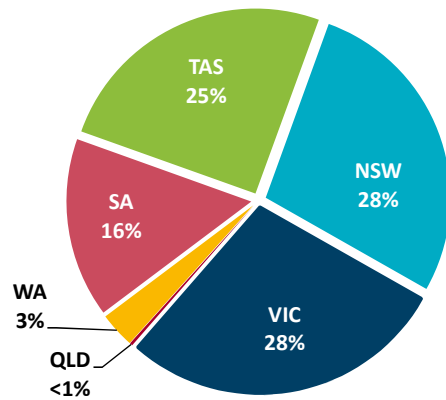
The majority of cherries are produced in the southern states of Australia, with major growing regions including **Orange** and **Young** in New South Wales; the **Huon Valley** in Tasmania; the **Goulburn Valley** and **Sunraysia** regions in Victoria; the **Adelaide Hills** in South Australia; and the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



Source: CGAI



2016/17 Fresh Cherries Production by State



Source: CGAI

Fresh Cherries Seasonality by State

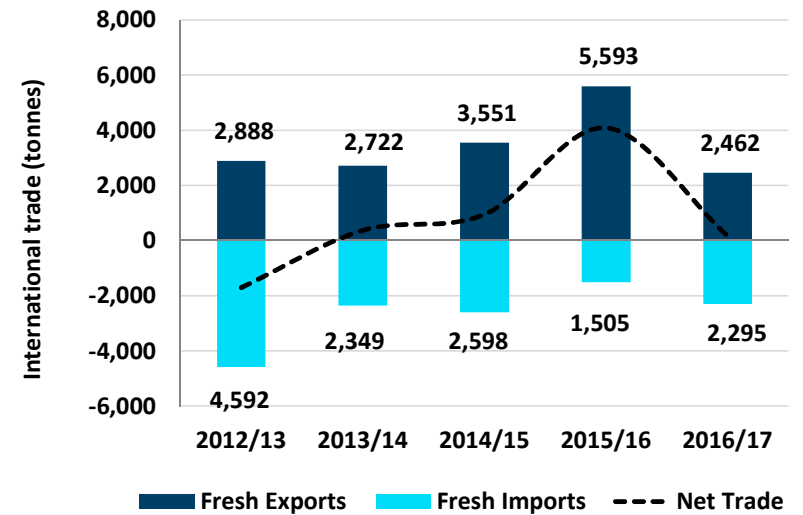
State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	3,105					High	High	High	High				
New South Wales	3,045				High	High	High	High	High				
Tasmania	2,764					High	High	High	High				
South Australia	1,729				High	High	High	High	High				
Western Australia	341				High	High	High	High	High				
Queensland	28				High	High	High	High	High				
Imports	2,295	High										High	High
Availability legend		High			Medium			Low					None

Source: CGAI

Fresh Cherries International Trade

Australia has traditionally been a net importer of fresh cherries, with the majority of this volume coming from the United States. In recent years, exports have been increasing. For the year ending June 2017, Australia imported **2,295 tonnes** of fresh cherries, and exported **2,462 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.

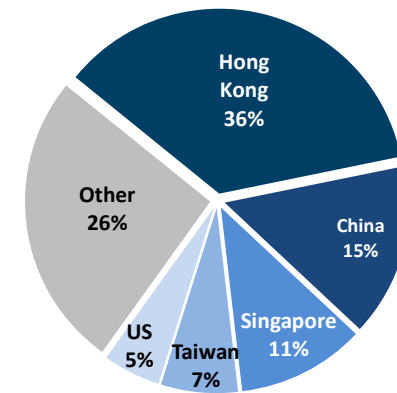
Net Fresh Cherry International Trade



Source: GTA

For the year ending June 2017, **36%** of exported fresh cherries were sent to Hong Kong, as profiled in the chart below.

2016/17 Fresh Cherries Exports by Country



Source: GTA



Fresh Cherries Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	1,305	746	1,272	Tasmania	1,560	2,872	1,381
Victoria	608	382	556	New South Wales	711	1,033	539
Queensland	384	237	279	Victoria	1,015	1,274	507
Western Australia	300	140	187	Northern Territory	1	24	21
South Australia	1	-	-	Queensland	10	17	7
TOTAL	2,598	1,505	2,295	Other	254	372	7
				TOTAL	3,551	5,593	2,462

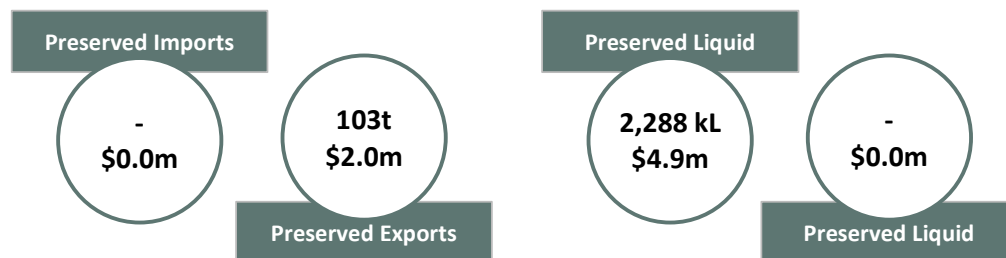
Fresh Cherries Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	2,565	1,484	2,286	Hong Kong	1,566	2,247	885
Serbia	18	8	8	China	324	791	373
New Zealand	15	6	1	Singapore	391	519	276
Netherlands	1	1	1	Taiwan	280	508	165
Mexico	-	4	-	US	-	64	124
Other	< 0.5	2	-	Other	991	1,465	638
TOTAL	2,598	1,505	2,295	TOTAL	3,551	5,593	2,462

Source: GTA

Processed Cherries International Trade

For the year ending June 2017, an additional **2,288 kilolitres** of preserved cherries in liquid were imported, while **103 tonnes** of preserved cherries were exported.



Source: GTA





Fresh Citrus Fruit Overview

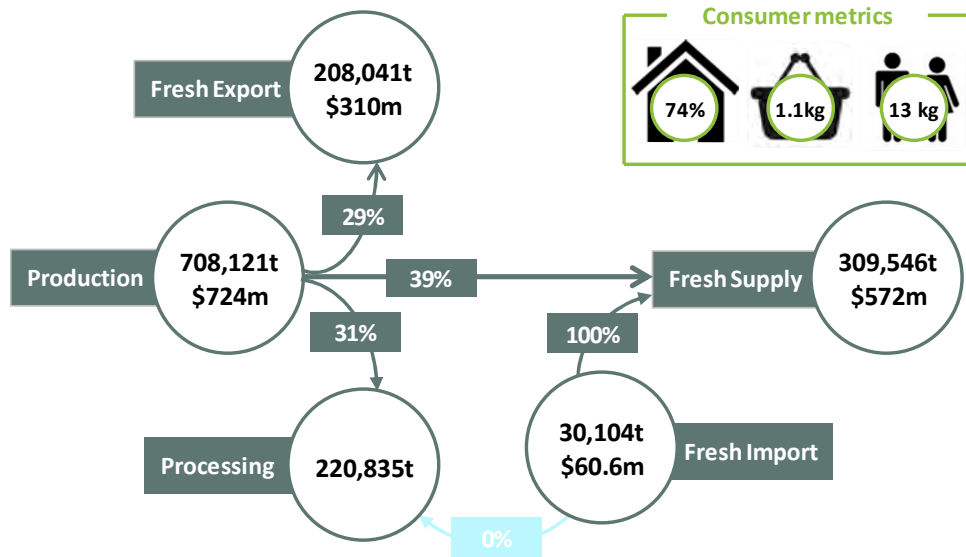
Pages 96-97 profile total citrus fruit production and trade. They combine information on grapefruit, lemons/limes, mandarins and oranges. The following pages profile each citrus fruit category in more detail.

For the year ending June 2017:

- **708,121 t** was produced.
- The value of production was **\$724.2 m** while the wholesale value of the fresh supply was **\$571.6 m**.
- **74%** of Australian households purchased a citrus fruit, buying an average of **1.1 kg** per shopping trip.
- The supply per capita of citrus for the year ending June 2017 was **13 kg**, based on the volume supplied.



Fresh Citrus Fruit Supply Chain—Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	626,294	714,154	+14%	708,121	>-1%	
Production (\$m)	\$ 558.9	\$ 678.5	+21%	\$ 724.2	+7%	
Producing Trees (000 Trees)	11,401	11,902	+4%	-	-	
Fresh Export Volume (t)	161,023	214,164	+33%	208,041	-3%	
Fresh Export Value (\$m)	\$ 206.5	\$ 297.3	+44%	\$ 310.3	+4%	
Fresh Import Volume (t)	28,156	25,493	-9%	30,104	+18%	
Fresh Import Value (\$m)	\$ 61.1	\$ 56.1	-8%	\$ 60.6	+8%	
Fresh Supply (t)	268,783	305,415	+14%	309,546	+1%	
Fresh Supply Wholesale Value (\$m)	\$ 478.5	\$ 525.7	+10%	\$ 571.6	+9%	
Supply per Capita (kg)	11.30	12.67	+12%	12.63	>-1%	

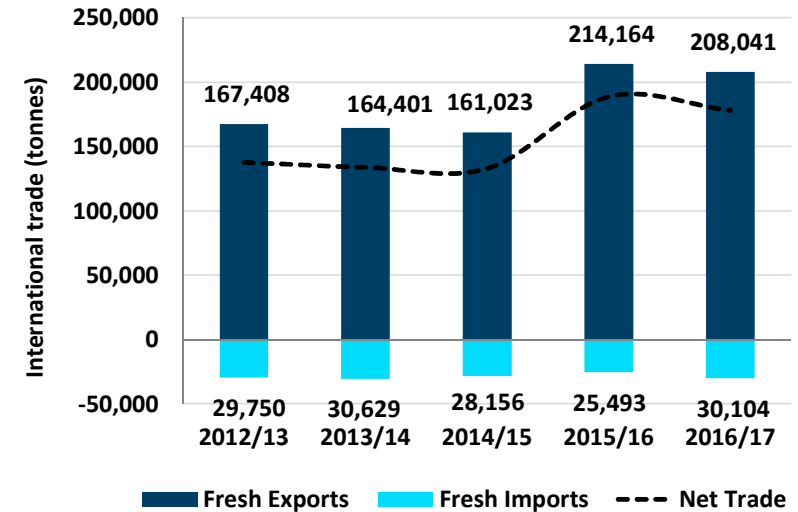
Sources: AC; CA; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Fresh Citrus Fruit International Trade

Australia is a net citrus fruit exporter. For the year ending June 2017, Australia exported **208,041 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

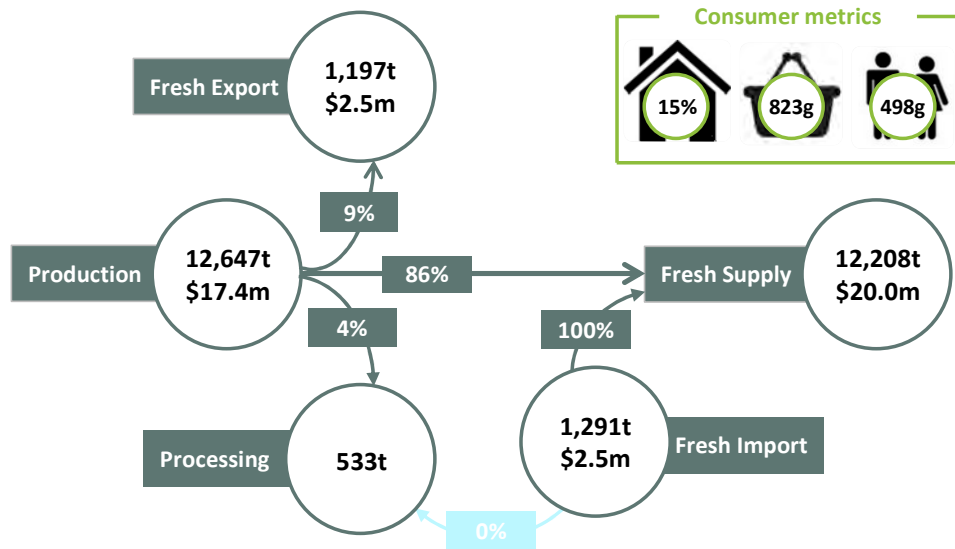
Grapefruit production occurs predominantly in the Murray Valley region. Imports, as well as production from Western Australia and the Northern Territory, allow for close to year round availability.



For the year ending June 2017:

- **12,647 t** was produced with **4%** sent to be processed, predominantly in juicing.
- The value of production was **\$17.4 m** while the wholesale value of the fresh supply was **\$20.0 m**.
- **15%** of Australian households purchased grapefruit, buying an average of **823 g** per shopping trip.
- The supply per capita was **498 g**, based on the volume supplied.

Fresh Grapefruit Fresh Supply Chain—Year Ending June 2017



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

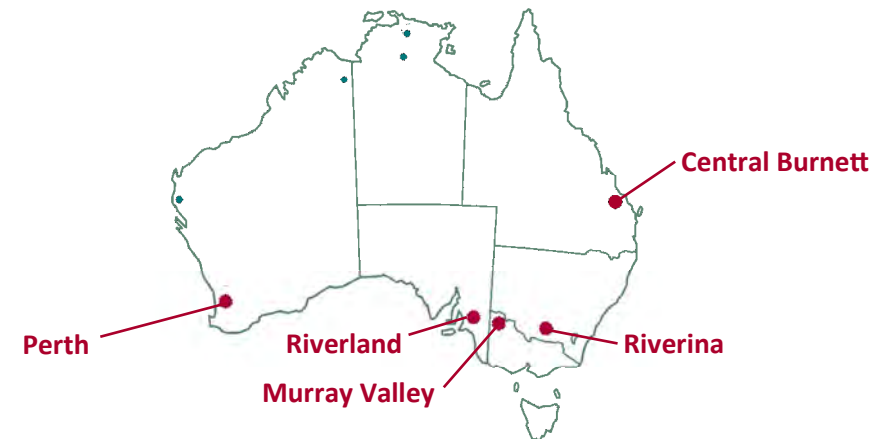


Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	11,842	12,618	+7%	12,647	<1%	
Production (\$m)	\$ 13.7	\$ 16.4	+20%	\$ 17.4	+6%	
Producing Trees (000 Trees)	151	162	+7%	-	-	
Fresh Export Volume (t)	167	438	>100%	1,197	>100%	
Fresh Export Value (\$m)	\$ 0.3	\$ 0.7	>100%	\$ 2.5	>100%	
Fresh Import Volume (t)	1,343	1,036	-23%	1,291	+25%	
Fresh Import Value (\$m)	\$ 2.3	\$ 1.8	-21%	\$ 2.5	+38%	
Fresh Supply (t)	12,087	12,616	+4%	12,208	-3%	
Fresh Supply Wholesale Value (\$m)	\$ 17.7	\$ 20.2	+14%	\$ 20.0	>-1%	
Supply per Capita (kg)	0.51	0.52	+3%	0.50	-5%	

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

Major Grapefruit Production Areas

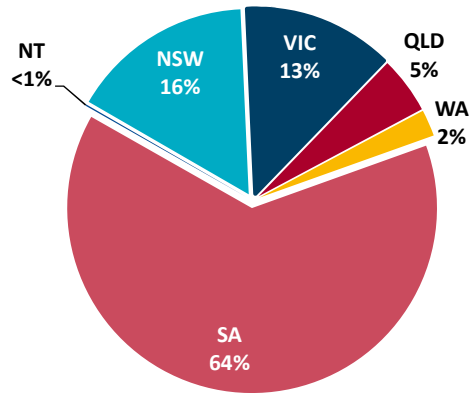
The majority of grapefruit production occurs in the **Murray Valley** region in Victoria. Other major producing regions are **Riverina** in New South Wales; **Central Burnett** in Queensland; **Riverland region** of South Australia, **Perth region** of Western Australia. There are smaller plantings in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



Source: CA



2016/17 Fresh Grapefruit Production by State



Source: CA

Fresh Grapefruit Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,017	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	1,639	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	630	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	293	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	8,051	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	17	High	High	High	High	High	High	High	High	High	High	High	High
Imported	1,291	None	None	None	None	None	None	None	None	None	None	None	None
Availability legend		High	High	Medium	Medium	Low	Low	None	None	None	None	None	None

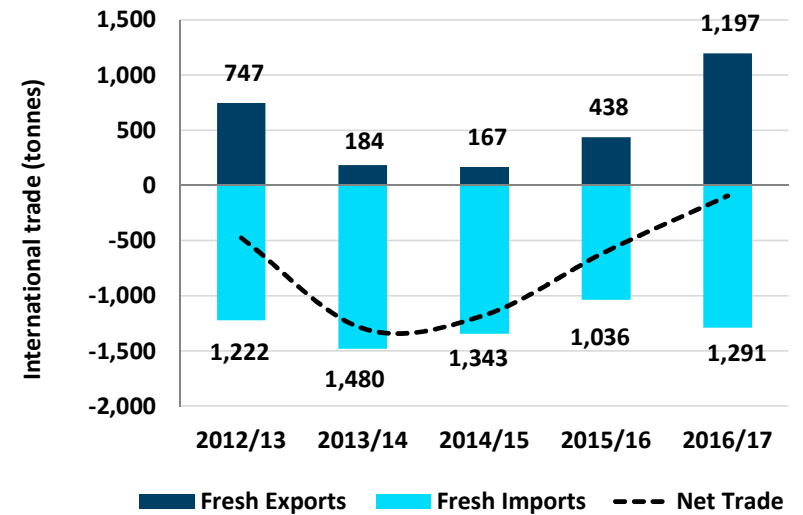
Source: CA

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 2017, Australia exported **1,197 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.



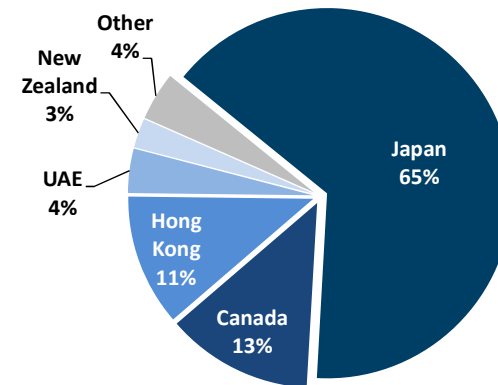
Net Fresh Grapefruit International Trade



Source: GTA

For the year ending June 2017, **65%** of exported fresh grapefruit was sent to Japan, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	476	411	589	Victoria	39	132	460
Victoria	401	307	339	South Australia	12	190	455
Western Australia	355	245	258	New South Wales	105	87	257
Queensland	111	73	104	Queensland	10	26	17
TOTAL	1,343	1,036	1,291	Western Australia	-	-	9
				Other	< 0.5	2	< 0.5
				TOTAL	167	438	1,197

Fresh Grapefruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	1,041	761	957	Japan	4	117	779
Israel	302	275	320	Canada	99	48	153
New Zealand	-	-	14	Hong Kong	-	< 0.5	138
Thailand	-	< 0.5	-	UAE	2	7	46
Other	-	< 0.5	-	New Zealand	32	27	31
TOTAL	1,343	1,036	1,291	Other	31	240	51
				TOTAL	167	438	1,197

Source: GTA

Processed Grapefruit International Trade

For the year ending June 2017, an additional **142 tonnes** of solid grapefruit juice were imported, while **415 kilolitres** were exported.



Source: GTA





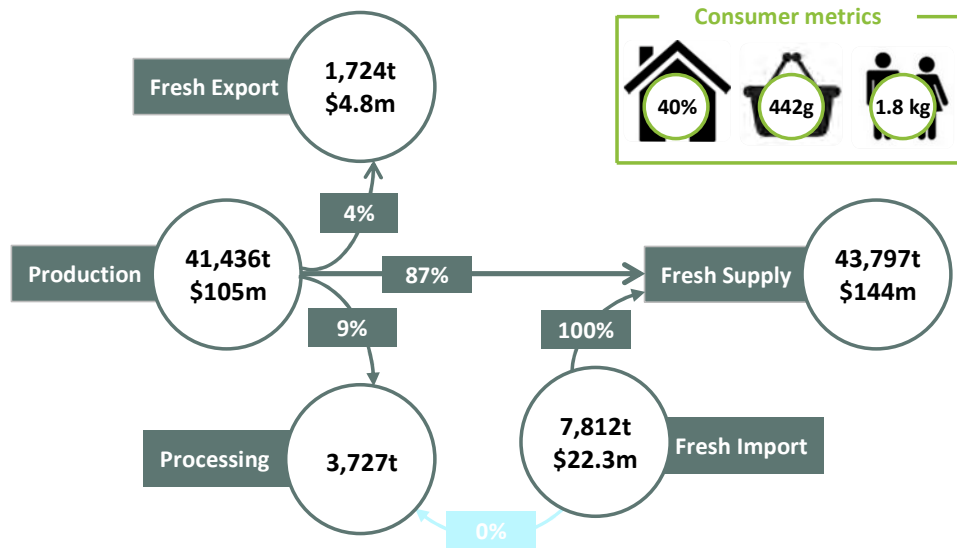
Fresh Lemons/Limes Overview

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 2017:



- **41,436 t** was produced with **9%** sent to be processed, predominantly in juicing.
- The value of production was **\$105.2 m** while the wholesale value of the fresh supply was **\$144.2 m**.
- **40%** of Australian households purchased fresh lemons or limes, buying an average of **442 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 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	42,729	44,757	+5%	41,436	-7%
Production (\$m)	\$ 106.6	\$ 113.4	+6%	\$ 105.2	-7%
Producing Trees (000 Trees)	501	568	+13%	-	-
Fresh Export Volume (t)	2,743	4,088	+49%	1,724	-58%
Fresh Export Value (\$m)	\$ 6.1	\$ 9.6	+56%	\$ 4.8	-50%
Fresh Import Volume (t)	7,334	6,464	-12%	7,812	+21%
Fresh Import Value (\$m)	\$ 21.8	\$ 19.7	-9%	\$ 22.3	+13%
Fresh Supply (t)	42,705	43,079	<1%	43,797	+2%
Fresh Supply Wholesale Value (\$m)	\$ 141.7	\$ 144.9	+2%	\$ 144.2	>-1%
Supply per Capita (kg)	1.80	1.79	>-1%	1.79	>-1%

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

Major Lemons/Limes Production Areas

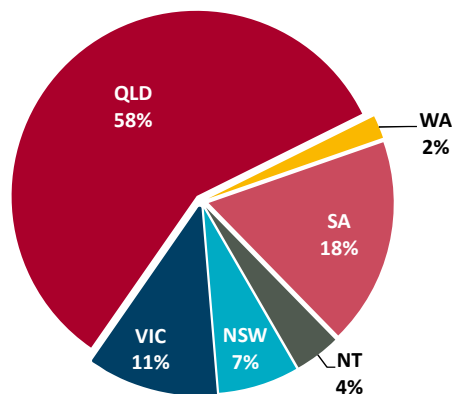
Half of all lemons and limes are grown in Queensland, with major growing regions including **Mareeba**, **Burnett** and **Bundaberg**. **Lismore** in northern New South Wales, **Riverland** in South Australia and **Darwin** in the Northern Territory are other major growing regions.



Source: CA



2016/17 Fresh Lemons/Limes Production by State



Source: CA

Fresh Lemons/Limes Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,901	High	High	High	High	None	None	Low	Low	Low	Low	Low	Low
Victoria	4,558	High	High	High	High	None	None	Low	Low	Low	Low	Low	Low
Queensland	24,033	High	High	High	High	None	None	Low	Low	Low	Low	Low	Low
Western Australia	829	High	High	High	High	None	None	Low	Low	Low	Low	Low	Low
South Australia	7,458	None	Low	Low	Low	Low	None	None	None	None	None	None	None
Northern Territory	1,657	High	High	High	High	None	None	Low	Low	Low	Low	Low	Low
Imported	7,812	None	Low	Low	Low	Low	Low	Low	Low	Low	None	None	None
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

Source: CA

Main Lemons/Limes Category

For the year ending June 2017:

Lemons accounted for **76%** of fresh production.

Limes accounted for **24%** of fresh production.



Seasonality by Lemons/Limes Category

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

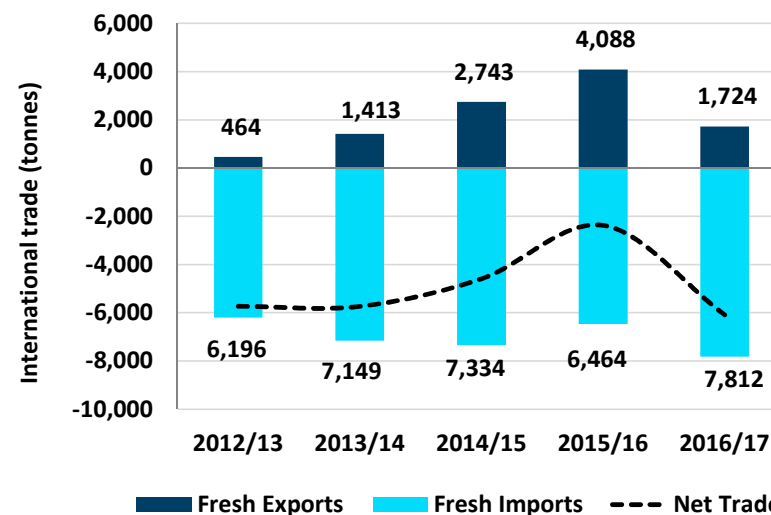
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	31,397	High	High	High	High	None	None	None	Low	Low	Low	Low	Low
Limes	10,039	None	None	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

Source: CA

Fresh Lemons/Limes International Trade

Australia is a net importer of lemons and limes, with the majority 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

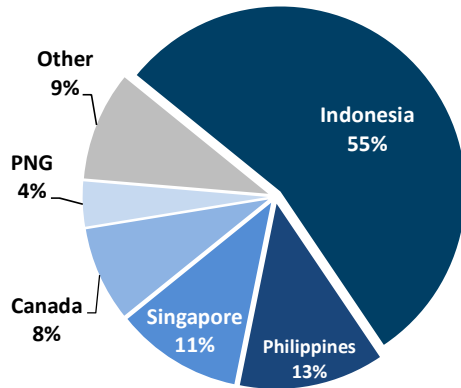


Source: GTA



For the year ending June 2017, **55%** of exported fresh lemons and limes were sent to Indonesia, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	2,948	2,517	4,003	Queensland	1,657	2,659	987
Victoria	2,241	1,836	1,989	Victoria	401	502	318
Western Australia	771	1,029	1,087	South Australia	321	504	219
Queensland	1,372	1,082	617	New South Wales	354	343	151
South Australia	3	< 0.5	116	Tasmania	< 0.5	< 0.5	22
Other	-	< 0.5	-	Other	11	79	27
TOTAL	7,334	6,464	7,812	TOTAL	2,743	4,088	1,724

Fresh Lemons/Limes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	7,220	5,666	6,163	Indonesia	1,277	2,752	943
Egypt	-	563	1,367	Philippines	145	262	218
New Zealand	105	33	243	Singapore	483	392	190
Spain	-	196	20	Canada	258	147	142
Iran	4	5	13	PNG	42	65	67
Other	5	1	6	Other	539	470	164
TOTAL	7,334	6,464	7,812	TOTAL	2,743	4,088	1,724

Source: GTA





Fresh Mandarins Overview

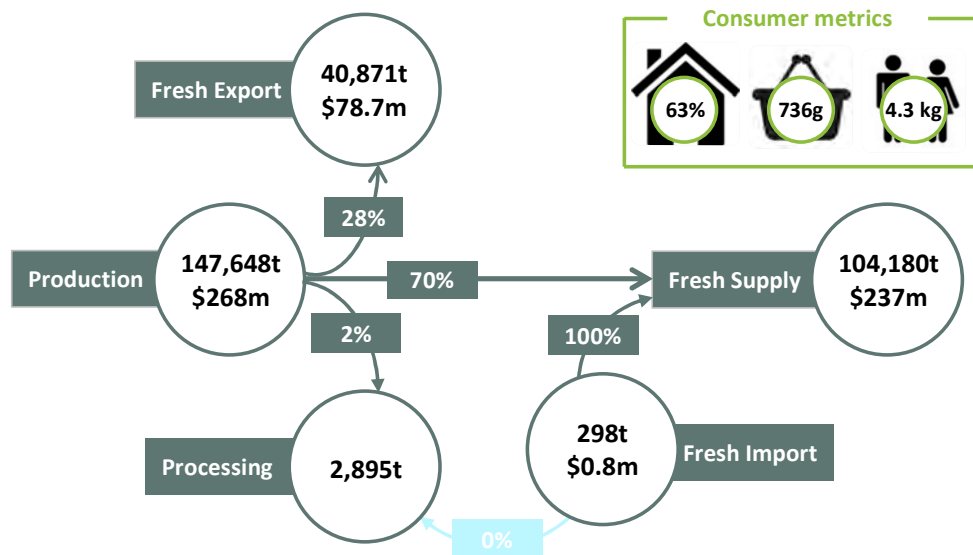
Mandarin production occurs across most states in Australia. Mandarins grow during the winter months.

For the year ending June 2017:

- **147,648 t** was produced with **2%** sent to be processed, predominantly in juicing.
- The value of production was **\$268.1 m** while the wholesale value of the fresh supply was **\$236.7 m**.
- **63%** of Australian households purchased fresh mandarins, buying an average of **736 g** per shopping trip.
- The supply per capita was **4.3 kg**, based on the volume supplied.



Fresh Mandarins Supply Chain—Year Ending June 2017



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

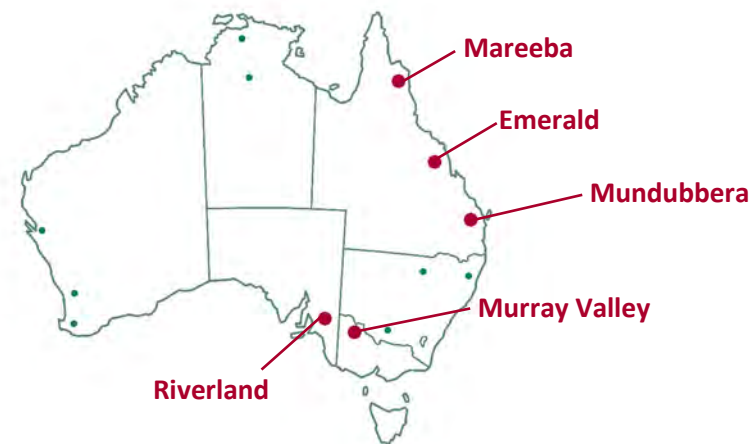


Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	104,624	153,275	+47%	147,648	-4%
Production (\$m)	\$ 177.9	\$ 246.4	+39%	\$ 268.1	+9%
Producing Trees (000 Trees)	1,907	2,330	+22%	-	-
Fresh Export Volume (t)	31,566	48,974	+55%	40,871	-17%
Fresh Export Value (\$m)	\$ 55.2	\$ 84.8	+53%	\$ 78.7	-7%
Fresh Import Volume (t)	3,006	3,375	+12%	298	-91%
Fresh Import Value (\$m)	\$ 9.0	\$ 9.1	+1%	\$ 0.8	-91%
Fresh Supply (t)	70,142	104,670	+49%	104,180	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 159.7	\$ 211.4	+32%	\$ 236.7	+12%
Supply per Capita (kg)	2.95	4.34	+47%	4.25	-2%

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

Major Mandarins Production Areas

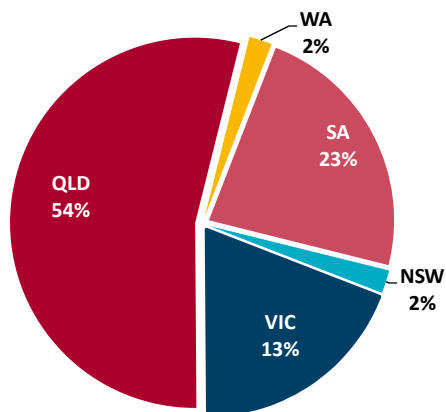
Mandarins are produced in most Australian states. The major producing areas include **Mareeba**, **Emerald** and **Mundubbera** in Queensland, and the **Murray Valley** and **Riverland** areas around the border of South Australia, Victoria and New South Wales.



Source: CA



2016/17 Fresh Mandarins Production by State



Sources: CA

Fresh Mandarins Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,953	High	High	High	Medium								
Victoria	28,053	High	High	High	Medium								
Queensland	79,730	High	High	High	Medium								
Western Australia	2,953	High	High	High	Medium								
South Australia	33,959	High	High	High	Medium								
Imported	298					Low	Low	Low					
Availability legend		High	High	High	Medium	Medium	Low	Low	None	None	None	None	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 **34%** of fresh production for the year ending June 2017.

Murcott (including **Honey Murcott**), a seeded yellow-orange mandarin. Murcott mandarins accounted for **30%** 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.

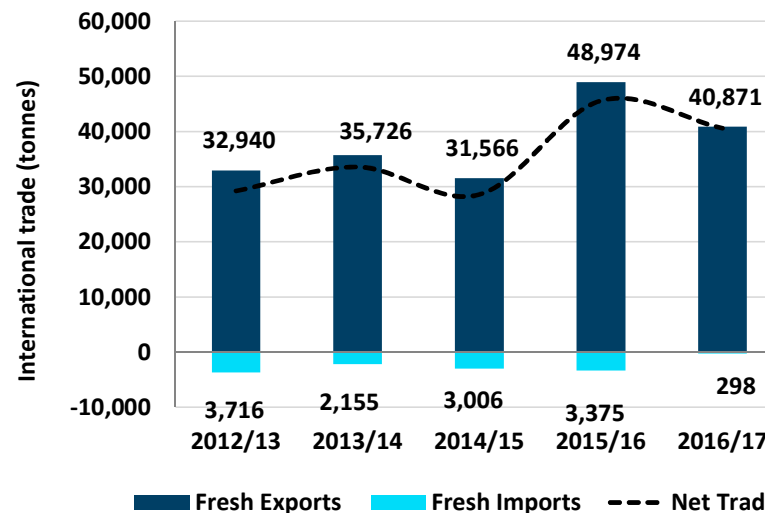
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Imperial	49,216	High	High	High	Medium								
Murcott	43,426	High	High	High	Medium								
Afourer	31,846	High	High	High	Medium								
Others	20,265	High	High	High	Medium								
Processing	2,895	High	High	High	Medium								
Availability legend		High	High	High	Medium	Medium	Low	Low	None	None	None	None	None

Source: CA

Fresh Mandarins International Trade

Australia is a net exporter of fresh mandarins, typically exporting between 30,000-35,000 tonnes per year. Exports decreased this year, coming off a very high 2015/16. For the year ending June 2017, Australia exported **40,871 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

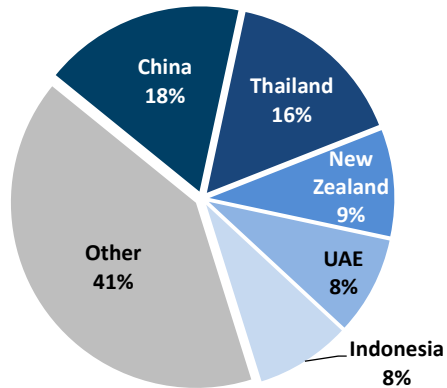
Net Fresh Mandarins International Trade



Source: GTA

Australia exports to a number of countries. For the year ending June 2017, **18%** of exported mandarins were sent to China, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	1,012	922	154	Queensland	17,259	28,273	24,572
Western Australia	692	955	106	South Australia	5,630	9,958	7,279
Queensland	254	371	25	Victoria	5,037	8,487	6,749
Victoria	1,048	1,127	13	New South Wales	269	532	216
TOTAL	3,006	3,375	298	Western Australia	< 0.5	7	26
				Other	3,372	1,716	2,029
				TOTAL	31,566	48,974	40,871

Fresh Mandarins Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	2,480	2,111	188	China	5,007	7,789	7,165
Israel	482	647	106	Thailand	3,882	7,024	6,399
New Zealand	< 0.5	15	1	New Zealand	3,970	5,161	3,811
Spain	-	445	-	UAE	2,653	6,260	3,485
Egypt	-	136	-	Indonesia	5,632	3,313	3,386
Other	44	21	4	Other	10,422	19,428	16,625
TOTAL	3,006	3,375	298	TOTAL	31,566	48,974	40,871

Source: GTA



Fresh Oranges Overview

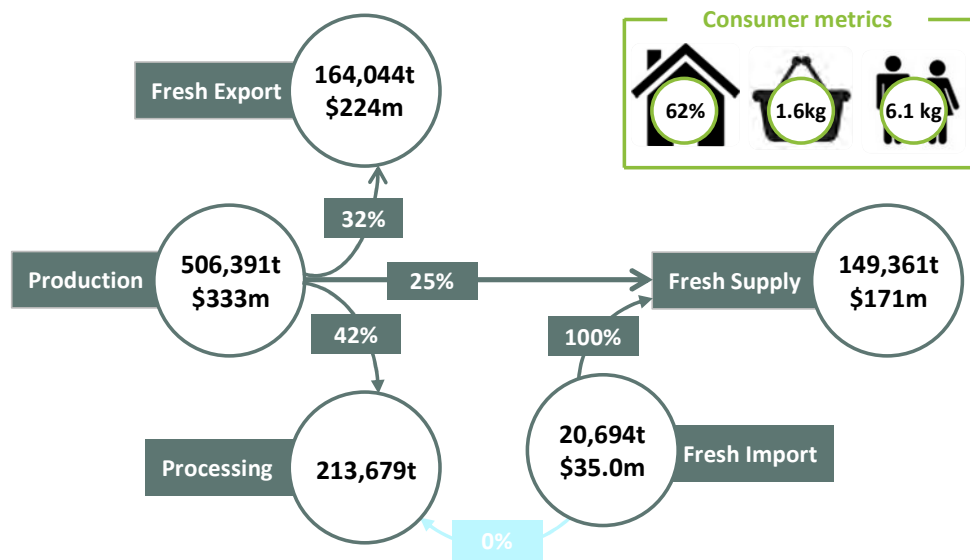
Orange production occurs predominantly in the southern states of Australia. Production is dominated by 2 main varieties; Navel oranges, available during the winter months, and Valencia oranges, available during the summer months.



For the year ending June 2017:

- **506,391 t** was produced with **42%** sent to be processed, predominantly in juicing.
- The value of production was **\$333.5 m** while wholesale value of the fresh supply was **\$170.6 m**.
- **62%** of Australian households purchased fresh oranges, buying an average of **1.6 kg** per shopping trip.
- The supply per capita was **6.1 kg**, based on the volume supplied.

Fresh Orange Supply Chain—Year Ending June 2017



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

Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	467,099	503,504	+8%	506,391	<1%
Production (\$m)	\$ 260.7	\$ 302.2	+16%	\$ 333.5	+10%
Producing Trees (000 Trees)	8,841	8,841	-	-	-
Fresh Export Volume (t)	126,417	160,580	+27%	164,044	+2%
Fresh Export Value (\$m)	\$ 144.6	\$ 202.1	+40%	\$ 223.8	+11%
Fresh Import Volume (t)	16,408	14,587	-11%	20,694	+42%
Fresh Import Value (\$m)	\$ 27.9	\$ 25.3	-9%	\$ 35.0	+38%
Fresh Supply (t)	143,849	145,050	<1%	149,361	+3%
Fresh Supply Wholesale Value (\$m)	\$ 159.5	\$ 149.2	-6%	\$ 170.6	+14%
Supply per Capita (kg)	6.05	6.02	>-1%	6.09	+1%

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

Major Orange Production Areas

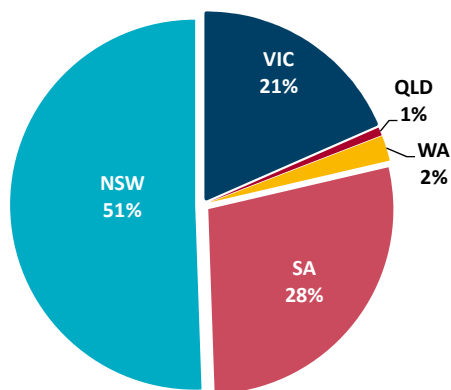
The majority of orange production occurs in the **Riverina** and **Murray Valley** areas on the New South Wales and Victorian borders. Other major producing areas include the **Riverland Region** in South Australia.



Source: CA



2016/17 Fresh Oranges Production by State



Source: CA

Fresh Oranges Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	258,031	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	93,255	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	3,634	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	9,333	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	142,138	High	High	High	High	High	High	High	High	High	High	High	High
Imported	20,694	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	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.

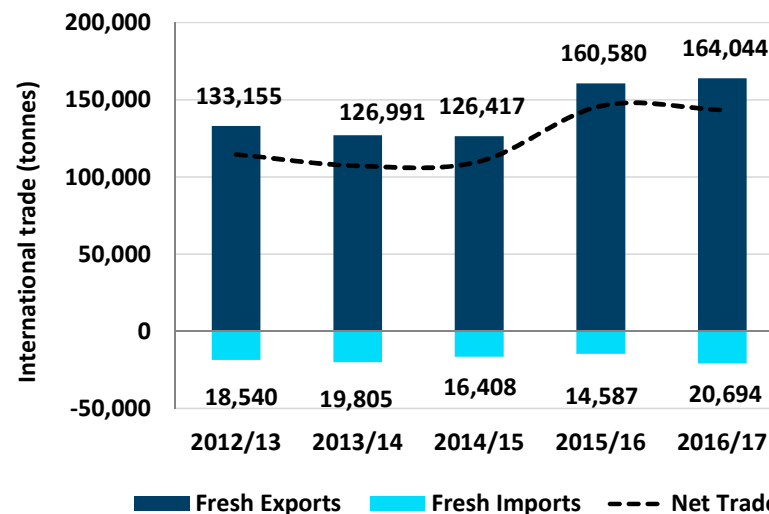
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	253,250	High	High	High	High	High	High	High	High	High	High	High	High
Valencia	37,307	High	High	High	High	High	High	High	High	High	High	High	High
Other	2,154	High	High	High	High	High	High	High	High	High	High	High	High
Processing	213,679	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Low	None							

Source: CA

Fresh Oranges International Trade

Australia is a net exporter of fresh oranges, typically exporting between 120,000-130,000 tonnes per year. Exports increased significantly this year. For the year ending June 2017, Australia exported **164,044 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

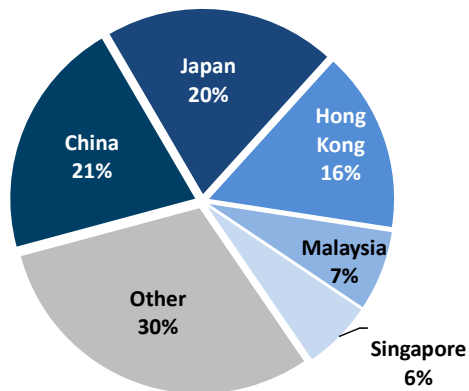
Net Fresh Oranges International Trade



Source: GTA

For the year ending June 2017, **21%** of exported fresh oranges were sent to China, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Victoria	5,490	4,563	7,011	Victoria	59,938	70,887	76,536
New South Wales	5,662	4,456	6,600	South Australia	48,436	64,971	58,928
Western Australia	2,492	2,852	3,740	New South Wales	16,603	21,272	23,683
Queensland	2,764	2,692	2,490	Queensland	1,131	1,310	2,633
South Australia	-	24	852	Western Australia	51	1,617	1,917
TOTAL	16,408	14,587	20,694	Other	259	522	346
				TOTAL	126,417	160,580	164,044

Fresh Oranges Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	15,735	13,116	15,249	China	14,216	23,034	34,051
Egypt	414	987	4,855	Japan	26,812	29,898	33,021
Israel	213	282	310	Hong Kong	28,584	39,641	25,773
Spain	-	50	45	Malaysia	12,109	11,991	11,417
Thailand	-	22	-	Singapore	9,341	11,460	9,929
Other	46	131	233	Other	35,355	44,555	49,853
TOTAL	16,408	14,587	20,694	TOTAL	126,417	160,580	164,044

Source: GTA

Processed Oranges International Trade

For the year ending June 2017, an additional **16,699 kilolitres** of frozen orange juice was imported. Australia also imported **2,950 kilolitres** of fresh orange juice, while exporting **4,381 kilolitres** of fresh orange juice.



Source: GTA



Fresh Custard Apples Overview

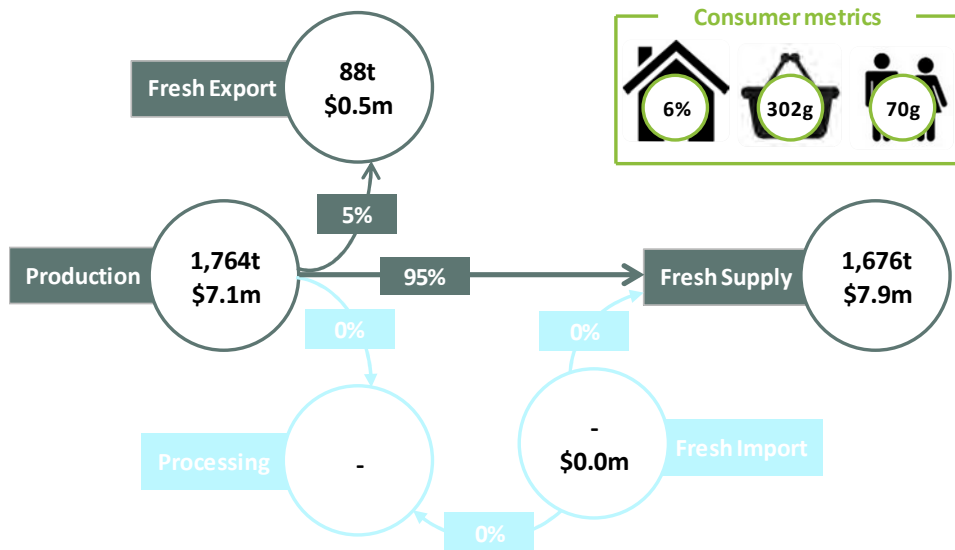
Custard apple production occurs in Queensland and northern New South Wales. The volume of custard apples that Australia imports and exports is negligible. The type of custard apple grown in Australia is unique in the world, known botanically as an atemoya.

For the year ending June 2017:

- **1,764 t** was produced.
- The value of production was **\$7.1 m** while the wholesale value of the fresh supply was **\$7.9 m**.
- **6%** of Australian households purchased fresh custard apples, buying an average of **302 g** per shopping trip.
- The supply per capita was **70 g**, based on the volume supplied.



Fresh Custard Apples Supply Chain—Year Ending June 2017



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

Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	1,465	1,700	+16%	1,764	+4%	
Production (\$m)	\$ 5.4	\$ 6.8	+25%	\$ 7.1	+5%	
Production area (Ha)	-	-	-	-	-	
Fresh Export Volume (t)	73	85	+16%	88	+4%	
Fresh Export Value (\$m)	\$ 0.3	\$ 0.4	+25%	\$ 0.5	+5%	
Fresh Import Volume (t)	-	-	-	-	-	
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-	
Fresh Supply (t)	1,391	1,615	+16%	1,676	+4%	
Fresh Supply Wholesale Value (\$m)	\$ 6.0	\$ 7.5	+25%	\$ 7.9	+5%	
Supply per Capita (kg)	0.06	0.07	+14%	0.07	+2%	

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

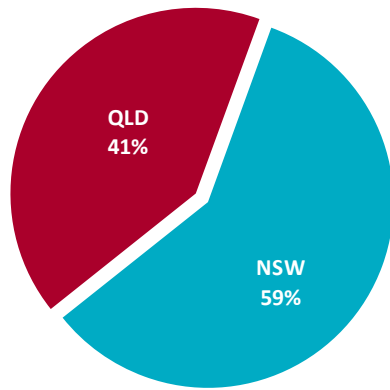
Major Custard Apples Production Areas

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

2016/17 Fresh Custard Apple Production by State



Source: CAA

Fresh Custard Apples Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,037	■	■	■	■						■	■	■
Queensland	727	■	■	■				■	■	■			
Availability legend		■	High		■	Medium		■	Low			None	

Source: CAA





Fresh Kiwifruit Overview

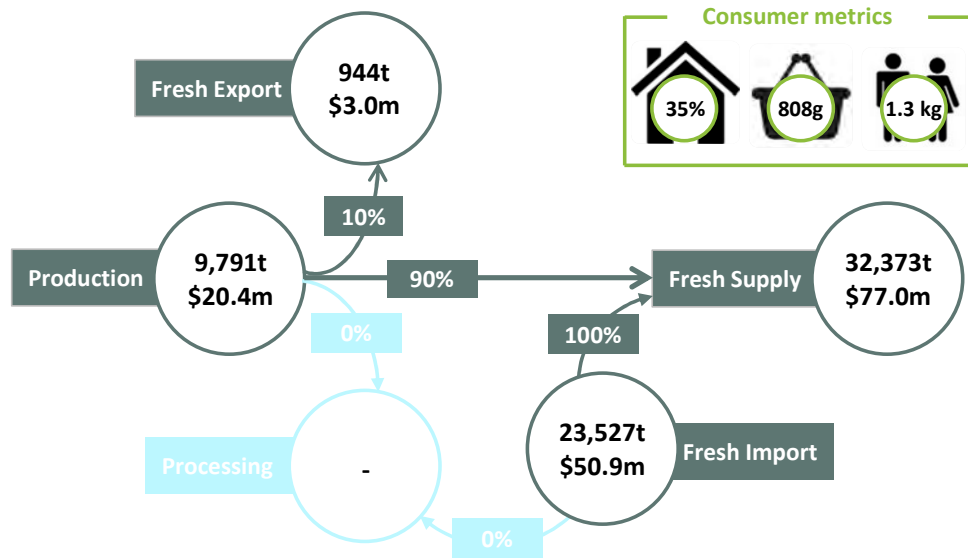
Kiwifruit production occurs predominantly in the southern states of Australia, with a larger volume being sourced from imports. The Australian season occurs between March and July. Year-round availability is made possible through imports, predominantly from New Zealand.



For the year ending June 2017:

- **9,791 t** was produced.
- The value of production was **\$20.4 m** while the wholesale value of the fresh supply was **\$77.0 m**.
- **35%** of Australian households purchased fresh kiwifruit, buying an average of **808 g** of kiwifruit per shopping trip.
- The supply per capita was **1.32 kg**, based on the volume supplied.

Fresh Kiwifruit Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,194	9,554	+4%	9,791	+2%
Production (\$m)	\$ 21.6	\$ 21.5	>-1%	\$ 20.4	-5%
Production area (Ha)	-	129	-	-	-
Fresh Export Volume (t)	720	1,004	+39%	944	-6%
Fresh Export Value (\$m)	\$ 2.7	\$ 4.2	+54%	\$ 3.0	-28%
Fresh Import Volume (t)	22,862	23,254	+2%	23,527	+1%
Fresh Import Value (\$m)	\$ 50.3	\$ 50.4	<1%	\$ 50.9	+1%
Fresh Supply (t)	31,336	31,804	+1%	32,373	+2%
Fresh Supply Wholesale Value (\$m)	\$ 83.9	\$ 78.6	-6%	\$ 77.0	-2%
Supply per Capita (kg)	1.32	1.32	<1%	1.32	<1%

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

**Note: Production volume and value has been modified from the quoted volumes published in the previous edition of the handbook (2015/16 edition).*

Major Kiwifruit Production Areas

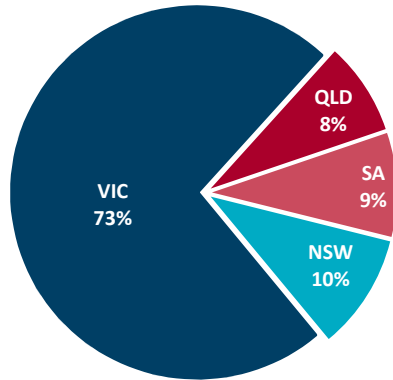
Kiwifruit occurs predominantly in the southern states of Australia. The **Goulburn Valley** region of Victoria is currently the major production area.



Source: (Freshlogic Analysis)



2016/17 Fresh Kiwifruit Production by State



Source: (Freshlogic Analysis)

Fresh Kiwifruit Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	989												
Victoria	7,120												
Queensland	791												
South Australia	890												
Imported	23,527												
Availability legend		High	Medium	Low	None								

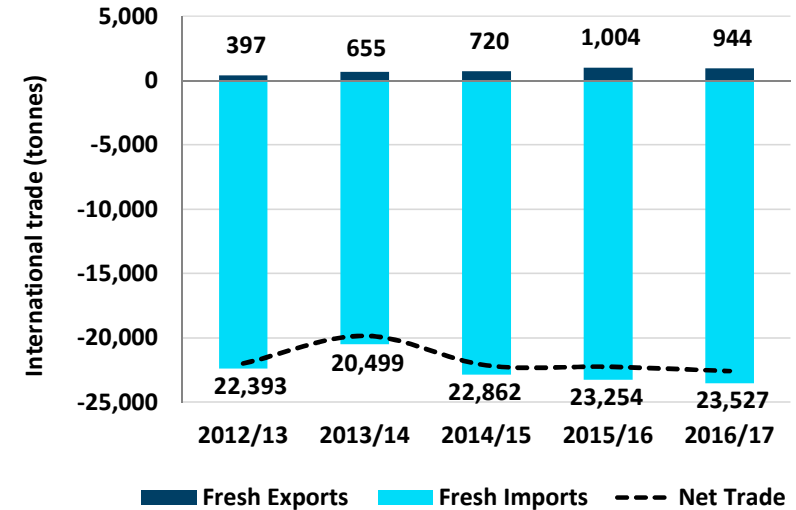
Source: (Freshlogic Analysis)

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 2017, Australia imported **23,527 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.



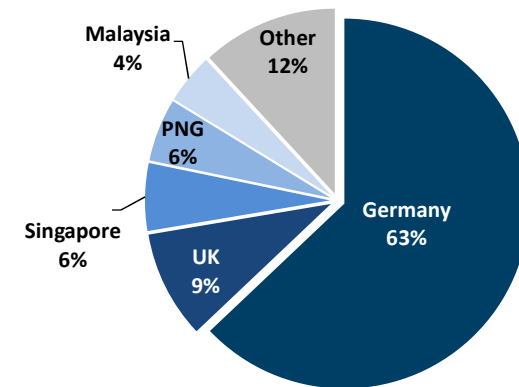
Net Fresh Kiwifruit International Trade



Source: GTA

For the year ending June 2017, **63%** of exported fresh kiwifruit was sent to Germany, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	9,615	10,232	9,763	Victoria	369	549	744
Victoria	7,226	6,916	8,002	Queensland	264	289	109
Queensland	3,410	3,050	2,961	Western Australia	2	6	19
Western Australia	2,037	2,470	2,301	New South Wales	2	58	6
South Australia	575	586	499	Tasmania	-	-	1
TOTAL	22,862	23,254	23,527	Other	82	102	64
				TOTAL	720	1,004	944

Fresh Kiwifruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New Zealand	17,218	16,445	17,182	Germany	262	480	594
Italy	5,533	6,785	6,302	UK	66	44	89
France	63	-	42	Singapore	128	114	56
US	48	24	-	PNG	33	47	52
Other	< 0.5	-	< 0.5	Malaysia	44	44	41
TOTAL	22,862	23,254	23,527	Other	187	276	112
				TOTAL	720	1,004	944

Source: GTA





Fresh Lychees Overview

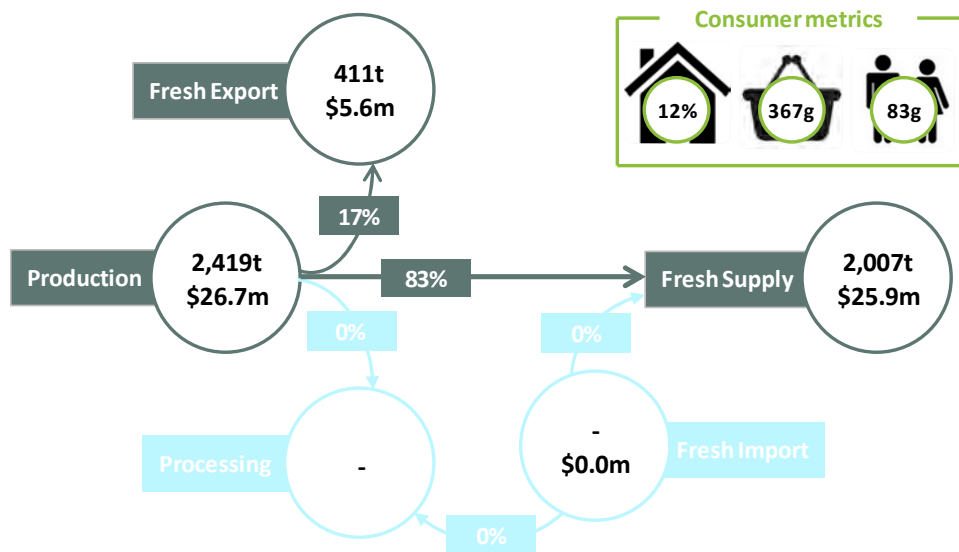
Lychee production occurs predominantly in Queensland, during the summer months.

For the year ending June 2017:

- **2,419 t** was produced.
- The value of production was **\$26.7 m** while the wholesale value of the fresh supply was **\$25.9 m**.
- **12%** of Australian households purchased fresh lychees, buying an average of **367 g** per shopping trip.
- The supply per capita was **83 g**, based on the volume supplied.



Fresh Lychees Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,250	2,700	+20%	2,419	-10%
Production (\$m)	\$ 17.5	\$ 27.8	+58%	\$ 26.7	-4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	350	440	+26%	411	-6%
Fresh Export Value (\$m)	\$ 3.3	\$ 5.5	+66%	\$ 5.6	<1%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,900	2,260	+19%	2,007	-11%
Fresh Supply Wholesale Value (\$m)	\$ 17.3	\$ 27.1	+57%	\$ 25.9	-5%
Supply per Capita (kg)	0.08	0.09	+17%	0.08	-13%

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

*Note: The 2014/15 edition of the handbook had no exports recorded. This and the 2015/16 edition now profiles this volume.

Major Lychee Production Areas

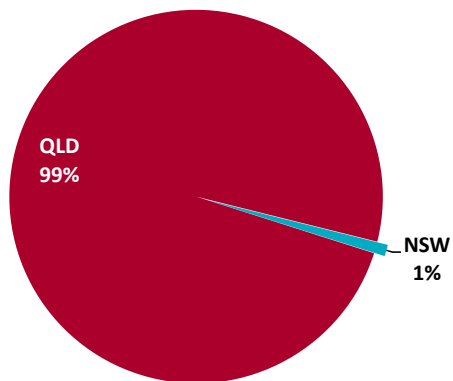
Lychee production occurs predominantly in Queensland. Major growing regions include **Atherton**, **Rockhampton**, **Bundaberg** and the **Sunshine Coast** in Queensland.



Source: ALGA



2016/17 Fresh Lychees Production by State



Source: ALGA

Fresh Lychee Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	24							Low	Low	Low			
Queensland	2,394			High	High	High	High	High	High	High			
Availability legend			High		Medium			Low				None	

Source: ALGA





Fresh Mangoes Overview

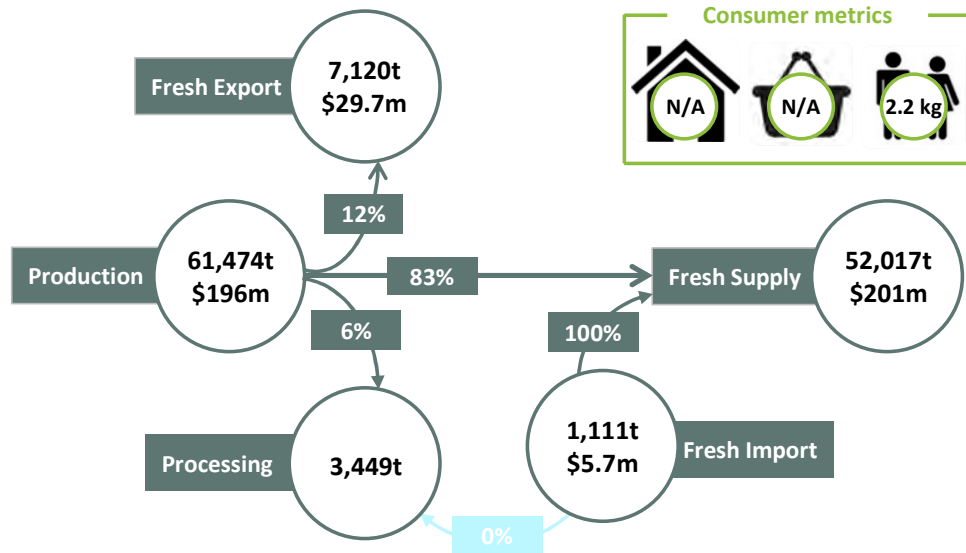
As a tropical fruit, mango production predominantly occurs in the North of Australia, particularly in Queensland and the Northern Territory.

For the year ending June 2017:

- **61,474 t** was produced.
- The value of production was **\$195.7 m** while the wholesale value of the fresh supply was **\$200.6 m**.
- The supply per capita was **2.2 kg**, based on the volume supplied.



Fresh Mangoes Supply Chain—Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	66,087	63,791	-3%	61,474	-4%	
Production (\$m)	\$ 190.7	\$ 210.3	+10%	\$ 195.7	-7%	
Producing Trees (000 Trees)	1,063	1,217	+15%	-	-	
Fresh Export Volume (t)	7,012	7,006	>-1%	7,120	+2%	
Fresh Export Value (\$m)	\$ 25.2	\$ 30.9	+23%	\$ 29.7	-4%	
Fresh Import Volume (t)	1,047	887	-15%	1,111	+25%	
Fresh Import Value (\$m)	\$ 6.3	\$ 5.1	-18%	\$ 5.7	+12%	
Fresh Supply (t)	56,220	53,880	-4%	52,017	-3%	
Fresh Supply Wholesale Value (\$m)	\$ 198.6	\$ 214.9	+8%	\$ 200.6	-7%	
Supply per Capita (kg)	2.36	2.23	-5%	2.16	-3%	

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

Major Mango Production Areas

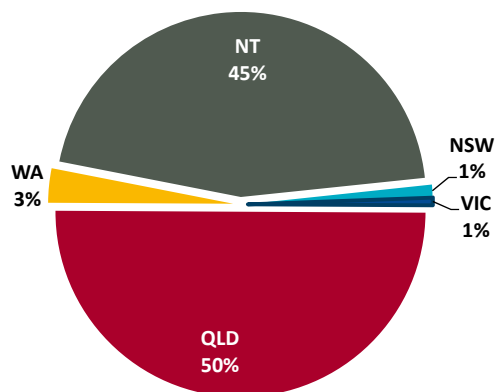
Mangoes are predominantly produced in the northern Australian states. The major producing areas include **Darwin** and **Katherine** in the Northern Territory; **Mareeba**, **Bowen** and **Bundaberg** in Queensland. It is also produced in **Kununurra**, Western Australia with small volumes coming from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



Source: AMIA



2016/17 Fresh Mangoes Production by State



Source: AMIA

Fresh Mangoes Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	667								Low	Medium			
Victoria	407								Low	Medium			
Queensland	30,737				High	High	High	High	High	Medium			
Western Australia	1,844				High	High	High	High	High	Medium			
Northern Territory	27,819		Low	Low	High	High	High	High	High	High			
Imported	1,111	Low	Low									Low	Low
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 **46%** of fresh production.

Calypso, a mango with yellowy orange skin with a deep pink blush, accounted for **17%** of fresh production.

R2E2 mangoes accounted for **22%** of fresh production.

Honey Gold mangoes accounted for **10%** of fresh production.

Other mangoes, such as Keitt, Tommy Atkins, Palmer and Nam Dok Mai, accounted for **5%** of fresh production.



Seasonality by Mango Variety

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

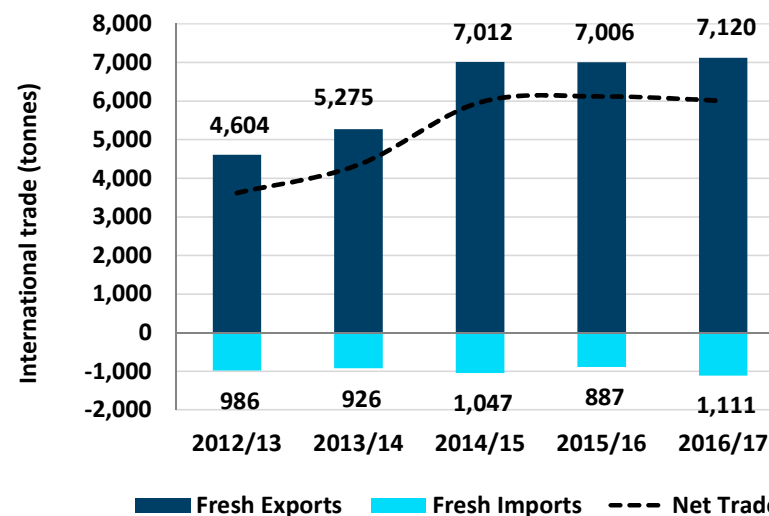
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Kensington Pride	26,692		High	High	High	High	High	High	High	High			
Calypso	9,864		High	High	High	High	High	High	High	High			
R2E2	12,766				High	High	High	High	High	High			
Honey gold	5,803				High	High	High	High	High	High			
Other	2,901				High	High	High	High	High	High			
Processing	3,449				High	High	High	High	High	High			
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 2017, Australia exported **7,120 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

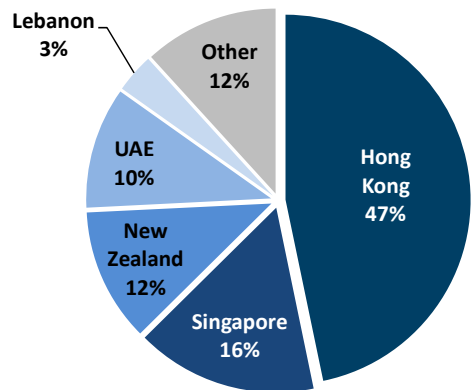


Source: GTA



For the year ending June 2017, **47%** of exported fresh mangoes were sent to Hong Kong, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	517	507	518	Queensland	5,456	5,465	5,327
Victoria	313	170	337	Northern Territory	726	690	731
Western Australia	164	154	214	Victoria	350	351	466
Queensland	44	52	42	New South Wales	263	273	461
South Australia	7	5	1	Western Australia	1	3	39
Other	< 0.5	-	< 0.5	Other	216	224	96
TOTAL	1,047	887	1,111	TOTAL	7,012	7,006	7,120

Fresh Mangoes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
Mexico	382	420	403	Hong Kong	2,707	3,010	3,328
Thailand	367	237	342	Singapore	953	869	1,127
Vietnam	21	38	113	New Zealand	886	834	828
India	13	12	84	UAE	813	805	756
Philippines	221	136	78	Lebanon	422	423	244
Other	43	45	91	Other	1,231	1,064	837
TOTAL	1,047	887	1,111	TOTAL	7,012	7,006	7,120

Source: GTA





Fresh Melons Overview

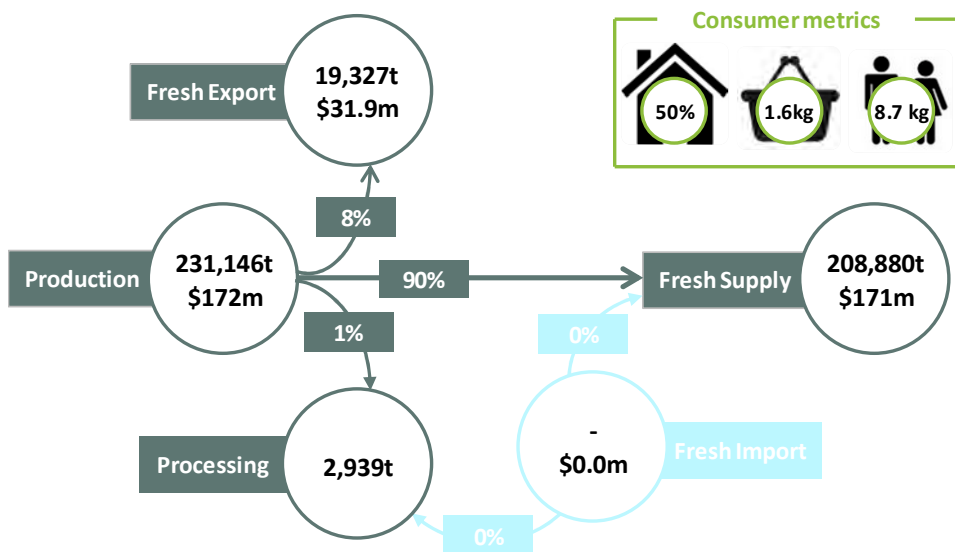
Pages 142-143 profile total melon fruit production and trade. It combines information on watermelons and muskmelons. The following pages profile each melon category in more detail.

For the year ending June 2017:

- **231,146 t** was produced.
- The value of production was **\$172.4 m** while the wholesale value of the fresh supply was **\$170.8 m**.
- **50%** of Australian households purchased fresh melons, buying an average of **1.6 kg** per shopping trip.
- The supply per capita was **8.66 kg**, based on the volume supplied.



Fresh Melons Supply Chain—Year Ending June 2017



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



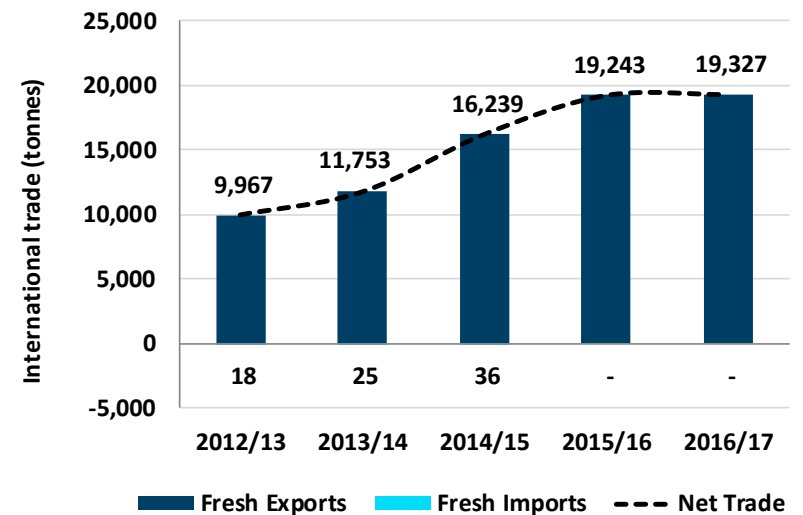
Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	217,207	225,727	+4%	231,146	+2%
Production (\$m)	\$ 185.7	\$ 165.8	-11%	\$ 172.4	+4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	16,239	19,243	+19%	19,327	<1%
Fresh Export Value (\$m)	\$ 24.1	\$ 31.0	+29%	\$ 31.9	+3%
Fresh Import Volume (t)	36	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	198,221	203,599	+3%	208,880	+3%
Fresh Supply Wholesale Value (\$m)	\$ 194.2	\$ 163.8	-16%	\$ 170.8	+4%
Supply per Capita (kg)	8.33	8.44	+1%	8.66	+3%

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

Fresh Melons International Trade

Australia is a net melon exporter. For the year ending June 2017 Australia exported **19,327 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

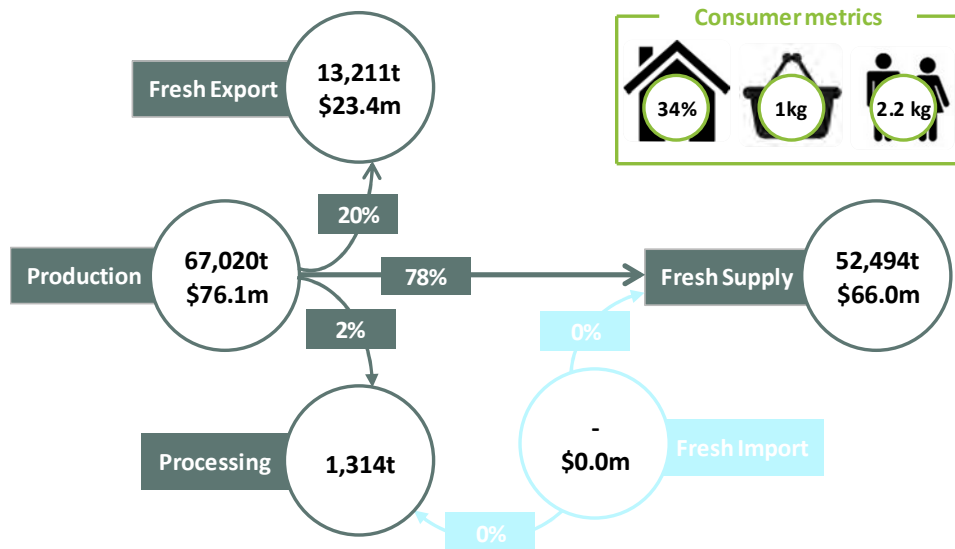
Muskmelons include **rockmelons** and **honey dew melons**. Production occurs across most states of Australia.

For the year ending June 2017:

- **67,020 t** was produced.
- The value of production was **\$76.1 m** while the wholesale value of the fresh supply was **\$66.0 m**.
- **34%** of Australian households purchased fresh muskmelons, buying an average of **1.0 kg** per shopping trip.
- The supply per capita was **2.2kg**, based on the volume supplied.



Fresh Muskmelons Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	65,281	66,932	+3%	67,020	<1%
Production (\$m)	\$ 69.5	\$ 70.7	+2%	\$ 76.1	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	12,386	13,790	+11%	13,211	-4%
Fresh Export Value (\$m)	\$ 19.6	\$ 24.0	+23%	\$ 23.4	-3%
Fresh Import Volume (t)	14	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	51,628	51,829	<1%	52,494	+1%
Fresh Supply Wholesale Value (\$m)	\$ 62.0	\$ 59.1	-5%	\$ 66.0	+12%
Supply per Capita (kg)	2.17	2.15	>-1%	2.18	+1%

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

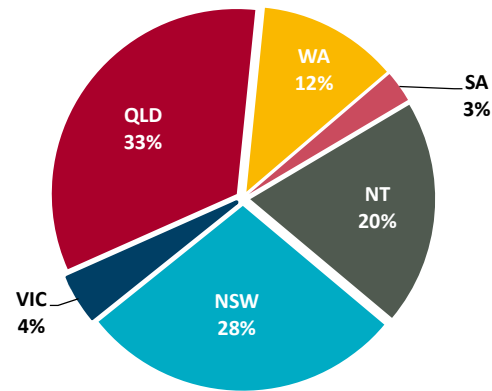
Major Muskmelon Production Areas

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

2016/17 Fresh Muskmelons Production by State



Sources: AMA

Fresh Muskmelons Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	18,848							High	High	High	High		
Victoria	2,749							High	High	High	High		
Queensland	22,296		High	High	High	High	High	High	High	High	High		
Western Australia	8,134	High	High	High	High								High
South Australia	1,851							High	High	High	High		
Northern Territory	13,143	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

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 **87%** of fresh production for the year ending June 2017.

Honeydew melons, a round melon with a light green flesh. Honeydew melons accounted for **13%** 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.

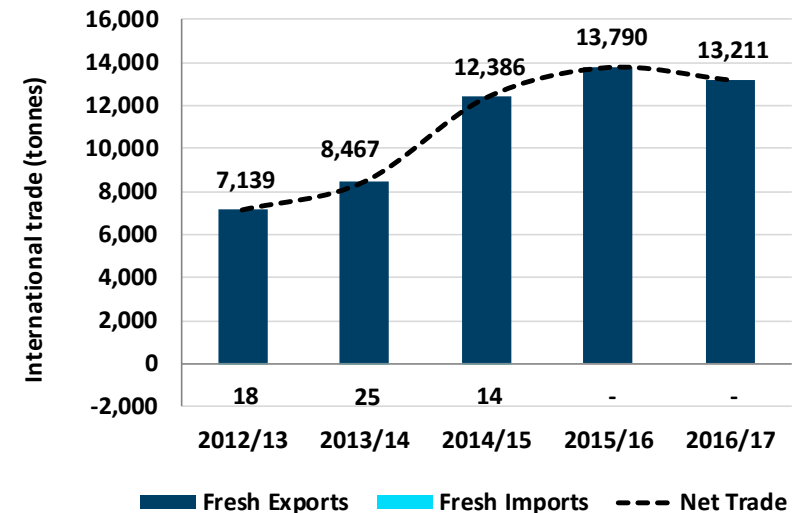
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	57,985	High	High	High	High	High	High	High	High	High	High	High	High
Honeydew	8,542	High	High	High	High	High	High	High	High	High	High	High	High
Piel de Sapo	493								High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

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 2017, Australia exported **13,211 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

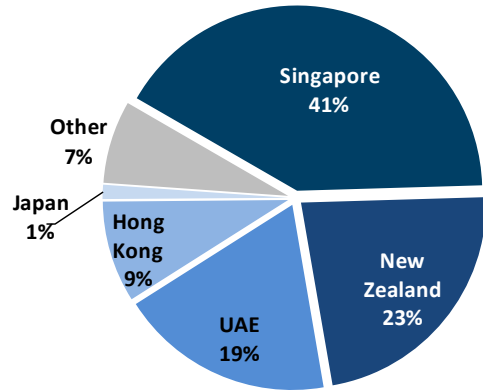


Source: GTA



For the year ending June 2017, **41%** of exported fresh muskmelons were sent to Singapore, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Queensland	14	-	-	Queensland	6,021	7,432	7,624
TOTAL	14	-	-	New South Wales	2,462	1,717	2,248
				Western Australia	2,325	2,335	1,836
				Northern Territory	139	133	678
				Victoria	850	1,343	578
				Other	589	829	247
				TOTAL	12,386	13,790	13,211

Fresh Muskmelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	14	-	-	Singapore	4,132	4,795	5,442
TOTAL	14	-	-	New Zealand	2,991	3,011	3,005
				UAE	3,366	3,744	2,475
				Hong Kong	1,009	1,259	1,171
				Japan	-	-	165
				Other	889	982	952
				TOTAL	12,386	13,790	13,211

Source: GTA





Fresh Watermelons

Overview

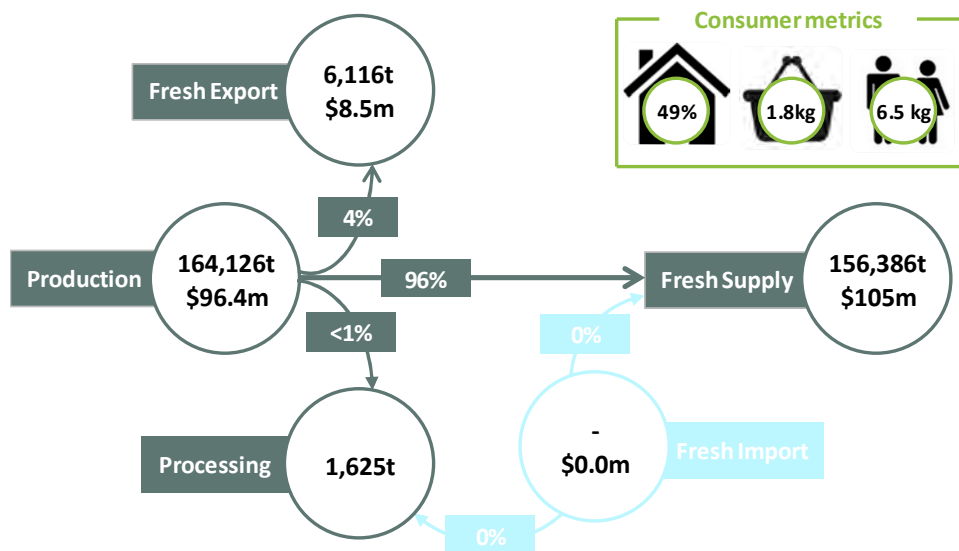
Watermelon production occurs across Australia, but predominantly in the northern states. The majority of production is destined for the fresh market, with limited volumes of export.

For the year ending June 2017:

- **164,126 t** was produced.
- The value of production was **\$96.4 m** while the wholesale value of the fresh supply was **\$104.8 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 2017



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

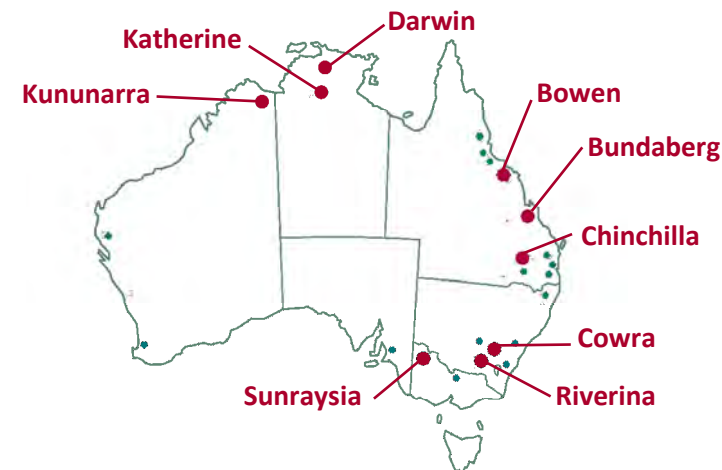


Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	151,927	158,795	+5%	164,126	+3%
Production (\$m)	\$ 116.3	\$ 95.1	-18%	\$ 96.4	+1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,852	5,453	+42%	6,116	+12%
Fresh Export Value (\$m)	\$ 4.5	\$ 7.0	+54%	\$ 8.5	+21%
Fresh Import Volume (t)	22	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	146,592	151,770	+4%	156,386	+3%
Fresh Supply Wholesale Value (\$m)	\$ 132.2	\$ 104.7	-21%	\$ 104.8	<1%
Supply per Capita (kg)	6.16	6.29	+2%	6.49	+3%

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

Major Watermelon Production Areas

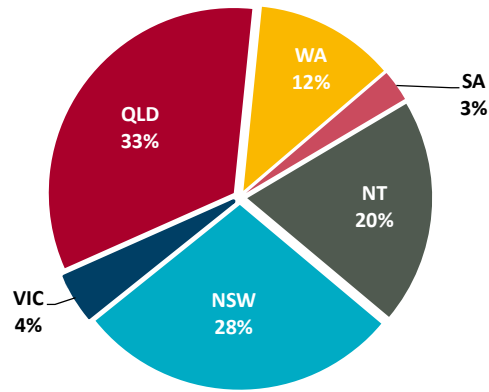
Watermelons are grown across most states in Australia, with the majority produced in the northern Australian states. The major producing areas include **Bundaberg, Bowen, and Chinchilla** in Queensland; **Darwin and Katherine** in Northern Territory; **Riverina and Cowra** in New South Wales; and **Kununarra**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



Source: AMA



2016/17 Fresh Watermelons Production by State



Source: AMA

Fresh Watermelons Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	46,156							High	High	High	High		
Victoria	6,732					High	High	High	High	High	High		
Queensland	54,601	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	19,919	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	4,532					High	High	High	High	High	High		
Northern Territory	32,185	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

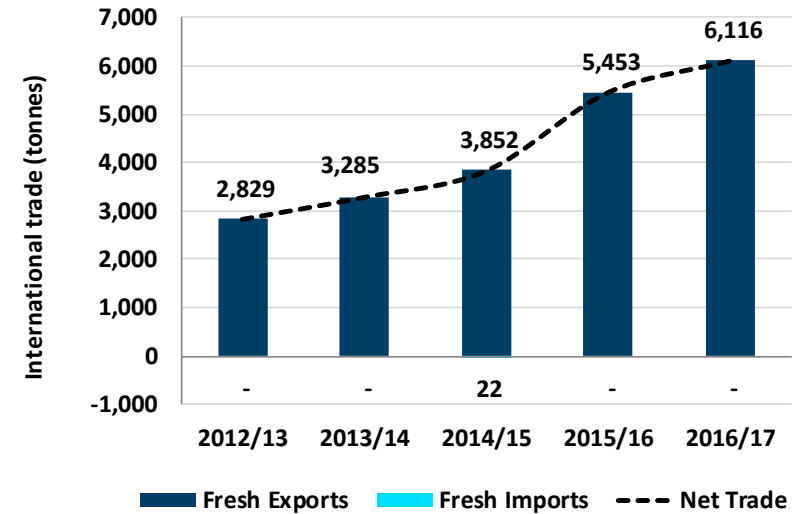
Source: AMA

Fresh Watermelons International Trade

Australia is a net exporter of fresh watermelons, with exports growing in recent years. For the year ending June 2017, Australia exported **6,116** 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.



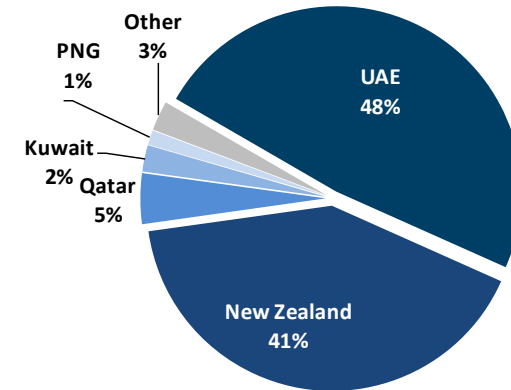
Net Fresh Watermelons International Trade



Source: GTA

For the year ending June 2017, **48%** of exported fresh watermelons were sent to New Zealand, as profiled in the chart below.

2016/17 Fresh Watermelons Exports by Country



Source: GTA



Fresh Watermelons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
Queensland	22	-	-	Queensland	3,271	4,442	4,603
TOTAL	22	-	-	Victoria	402	412	423
				Western Australia	11	26	366
				New South Wales	125	108	328
				South Australia	-	11	116
				Other	42	454	279
				TOTAL	3,852	5,453	6,116

Fresh Watermelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
Other	22	-	-	UAE	1,489	2,550	2,957
TOTAL	22	-	-	New Zealand	2,134	2,385	2,513
				Qatar	37	136	269
				Kuwait	60	151	141
				PNG	72	67	78
				Other	60	164	158
				TOTAL	3,852	5,453	6,116

Source: GTA





Fresh Nashi Overview

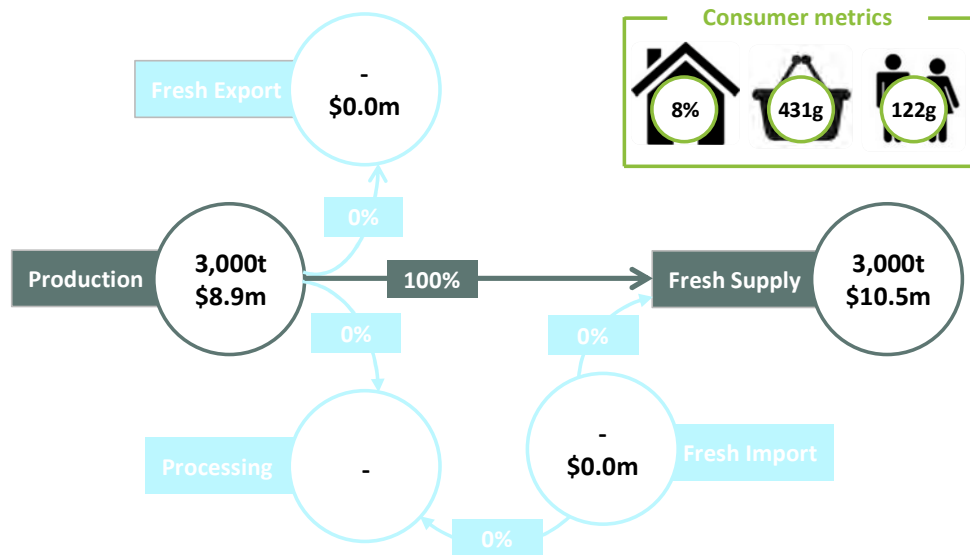
Nashi fruit, and other Asian pears as they are sometimes known, are grown predominantly in the Goulburn Valley region of Victoria. Nashi fruit grown in Australia are all grown for the fresh market.



For the year ending June 2017:

- **3,000 t** was produced.
- The value of production was **\$8.9 m** while the wholesale value of the fresh supply was **\$10.5 m**.
- **8%** of Australian households purchased fresh nashi, buying an average of **431 g** per shopping trip.
- The supply per capita was **122 g**, based on the volume supplied.

Fresh Nashi Supply Chain—Year Ending June 2017



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



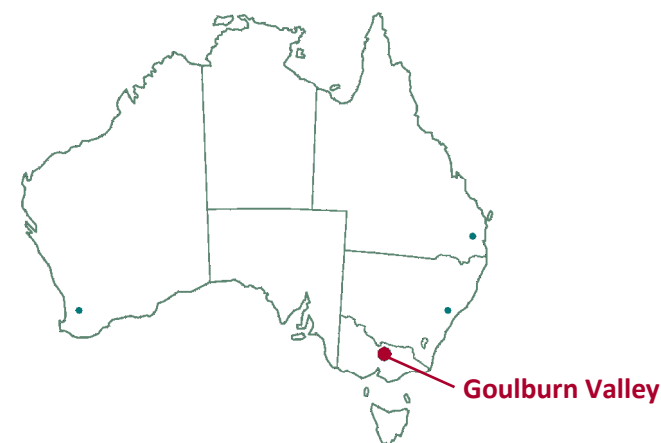
Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,750	1,750	-36%	3,000	+71%
Production (\$m)	\$ 7.6	\$ 4.8	-36%	\$ 8.9	+84%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	2,750	1,750	-36%	3,000	+71%
Fresh Supply Wholesale Value (\$m)	\$ 9.0	\$ 5.7	-36%	\$ 10.5	+84%
Supply per Capita (kg)	0.12	0.07	-37%	0.12	+69%

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 (2015/16 edition).

Major Nashi Production Areas

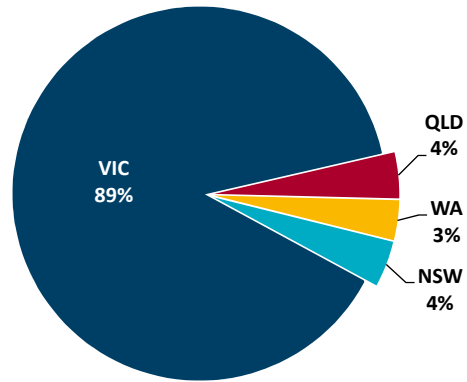
Nashi production occurs predominantly in the **Goulburn Valley** region of Victoria.



Source: ANGA



2016/17 Fresh Nashi Production by State



Source: ANGA

Fresh Nashi Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	120	High	High	High	Medium	Medium				Low	Low	None	None
Victoria	2,655	High	High	High	Medium	Medium				Low	Low	None	None
Queensland	120	High	High	High	Medium	Medium				Low	Low	None	None
Western Australia	105	High	High	High	Medium	Medium				Low	Low	None	None
Availability legend		High	High	High	Medium	Medium	Low	Low	None	None	None	None	None

Source: ANGA





Fresh Passionfruit Overview

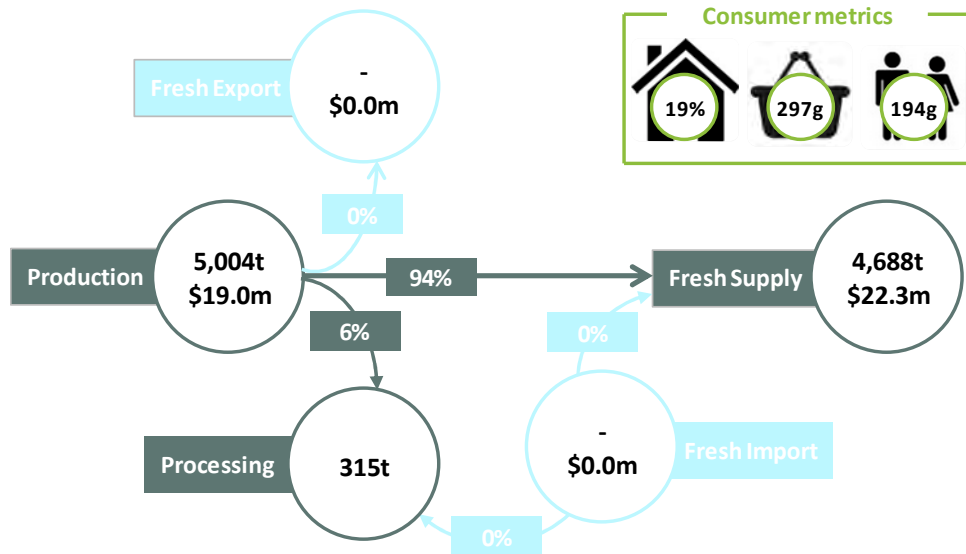
Passionfruit is grown in the north of Australia, with the majority grown in Queensland. The majority of Australian production is destined for the fresh market.

For the year ending June 2017:

- **5,004 t** was produced.
- The value of production was **\$19.0 m** while the wholesale value of the fresh supply was **\$22.3 m**.
- **19%** of Australian households purchased fresh passionfruit, buying an average of **297 g** per shopping trip.
- The supply per capita was **194 g**, based on the volume supplied.



Fresh Passionfruit Supply Chain—Year Ending June 2017



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

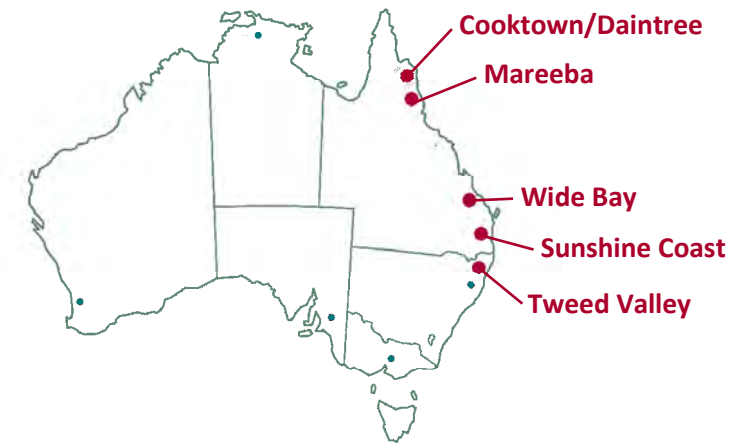


Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	4,269	5,196	+22%	5,004	-4%
Production (\$m)	\$ 15.6	\$ 17.2	+10%	\$ 19.0	+11%
Producing Vines (000 Vines)	224	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	3,954	4,868	+23%	4,688	-4%
Fresh Supply Wholesale Value (\$m)	\$ 18.2	\$ 20.1	+10%	\$ 22.3	+11%
Supply per Capita (kg)	0.17	0.20	+21%	0.19	-5%

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

Major Passionfruit Production Areas

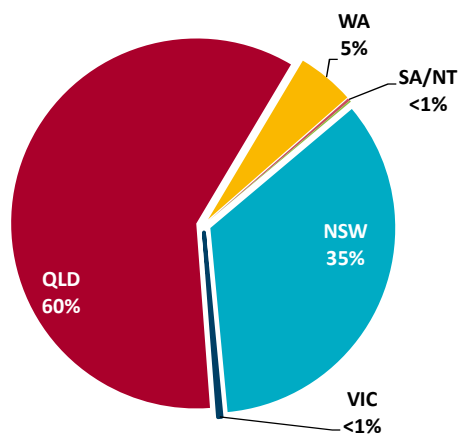
Passionfruit production occurs in the north of Australia. Major production areas include the **Wide Bay** region, **Cooktown**, **Daintree** and **Mareeba** in Far North Queensland and the **Sunshine Coast** in South East Queensland, and **Tweed Valley** in the north of New South Wales.



Source: PAI



2016/17 Fresh Passionfruit Production by State



Source: PAI

Fresh Passionfruit Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,734	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	15	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	2,994	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	250	High	High	High	High	High	High	High	High	High	High	High	High
SA/NT	11	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

Source: PAI





Fresh Papaya/Pawpaw Overview

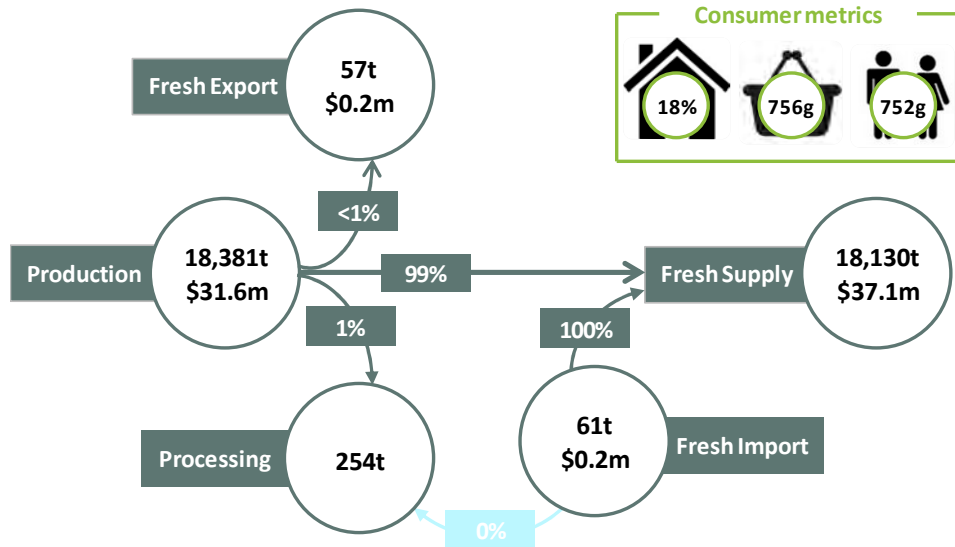
As a tropical fruit, red papaya and yellow pawpaw production predominantly occurs in the North of Australia, in Queensland, as well as some production in the Northern Territory and Western Australia.



For the year ending June 2017:

- **18,381 t** was produced.
- The value of production was **\$31.6 m** while the wholesale value of the fresh supply was **\$37.1m**.
- **18%** of Australian households purchased fresh red papaya and yellow pawpaw, buying an average of **756 g** per shopping trip.
- The supply per capita was **752 g**, based on the volume supplied.

Fresh Papaya/Pawpaw Supply Chain—Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	13,949	16,729	+20%	18,381	+10%	
Production (\$m)	\$ 25.2	\$ 28.4	+13%	\$ 31.6	+11%	
Production area (Ha)	-	-	-	-	-	
Fresh Export Volume (t)	2	89	>100%	57	-35%	
Fresh Export Value (\$m)	< \$0.1	\$ 0.2	>100%	\$ 0.2	-16%	
Fresh Import Volume (t)	162	106	-35%	61	-43%	
Fresh Import Value (\$m)	\$ 0.5	\$ 0.3	-35%	\$ 0.2	-47%	
Fresh Supply (t)	13,900	16,516	+19%	18,130	+10%	
Fresh Supply Wholesale Value (\$m)	\$ 29.9	\$ 33.4	+12%	\$ 37.1	+11%	
Supply per Capita (kg)	0.58	0.69	+17%	0.75	+9%	

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

Major Papaya/Pawpaw Production Areas

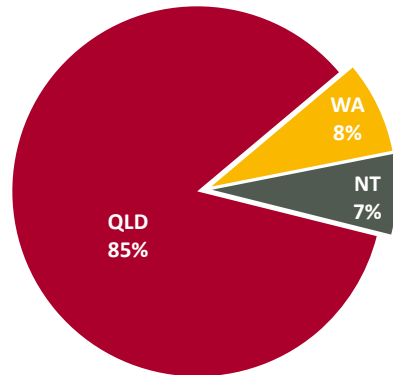
Red papaya and yellow pawpaw are predominantly produced in the northern Australian states. Major producing areas are **Mareeba** and **Tully** in Queensland.



Source: PA



2016/17 Fresh Papaya/Pawpaw Production by State



Source: PA

Fresh Papaya/Pawpaw Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	15,623	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	1,470	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Northern Territory	1,287	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Imported	61	None	None	None	None	None	None	None	None	None	None	None	None
Availability legend		High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	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	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Red Papaya	11,947	High	High	High	High	High	High	High	High	High	High	High	High
Yellow Pawpaw	6,433	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Availability legend		High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None

Source: PA

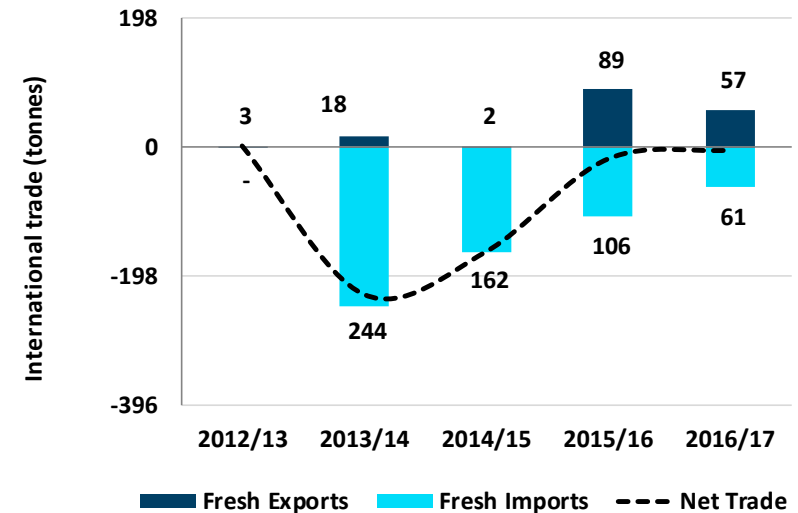


Fresh Papaya/Pawpaw International Trade

Australia is a net importer of fresh red papaya and yellow pawpaw, typically importing between 100-500 tonnes per year. For the year ending June 2017, Australia imported **61 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

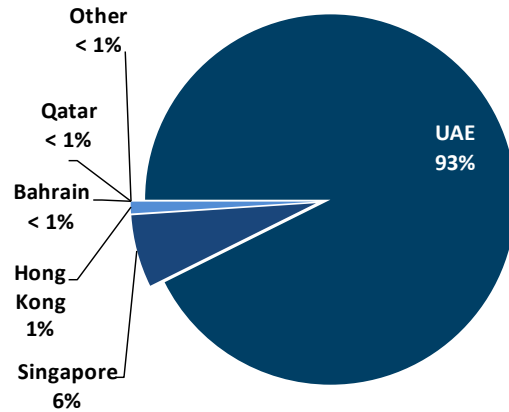


Source: GTA



For the year ending June 2017, **93%** of exported fresh red papaya and yellow pawpaw were sent to UAE, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Victoria	150	89	54	Queensland	2	89	57
New South Wales	13	17	7	Victoria	-	-	< 0.5
TOTAL	162	106	61	Tasmania	-	< 0.5	< 0.5
				New South Wales	< 0.5	-	< 0.5
				Other	< 0.5	< 0.5	1
				TOTAL	2	89	57

Papaya/Pawpaw Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
Fiji	158	106	61	UAE	-	-	53
Vietnam	< 0.5	-	-	Singapore	< 0.5	< 0.5	4
Other	4	-	-	Hong Kong	-	1	1
TOTAL	162	106	61	Bahrain	-	-	< 0.5
				Qatar	-	-	< 0.5
				Other	2	87	< 0.5
				TOTAL	2	89	57

Source: GTA





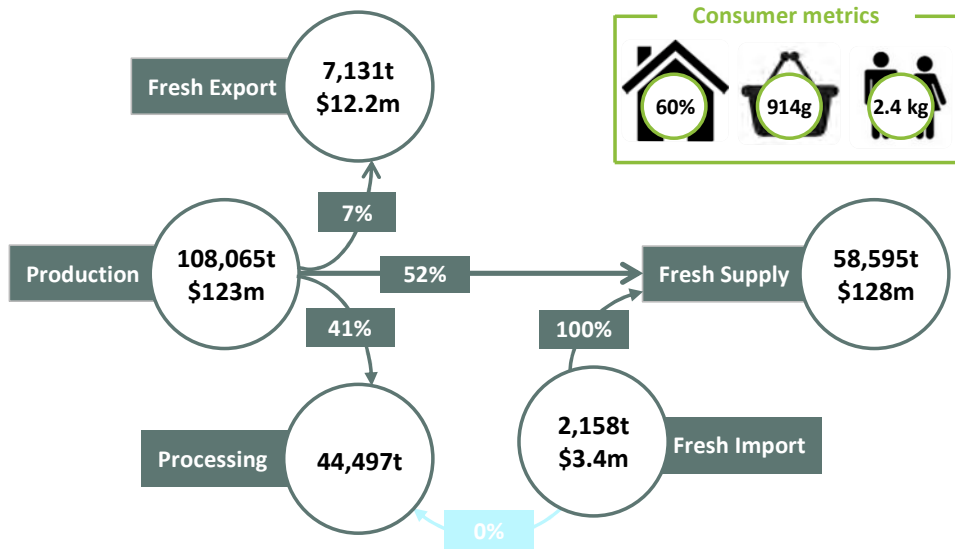
Fresh Pears Overview

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 2017:



- **108,065 t** was produced with **41%** sent to be processed.
- The value of production was **\$122.9 m** while the wholesale value of the fresh supply was **\$128.5 m**.
- **60%** of Australian households purchased fresh pears, buying an average of **914 g** per shopping trip.
- The supply per capita was **2.4 kg**, based on the volume supplied.

Fresh Pears Supply Chain—Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	104,370	117,677	+13%	108,065	-8%	
Production (\$m)	\$ 104.7	\$ 116.4	+11%	\$ 122.9	+6%	
Producing Trees (000 Trees)	1,621	1,441	-11%	-	-	
Fresh Export Volume (t)	7,649	12,260	+60%	7,131	-42%	
Fresh Export Value (\$m)	\$ 12.5	\$ 21.7	+74%	\$ 12.2	-44%	
Fresh Import Volume (t)	1,613	1,487	-8%	2,158	+45%	
Fresh Import Value (\$m)	\$ 3.0	\$ 2.6	-14%	\$ 3.4	+33%	
Fresh Supply (t)	58,033	58,762	+1%	58,595	>-1%	
Fresh Supply Wholesale Value (\$m)	\$ 107.1	\$ 110.0	+3%	\$ 128.5	+17%	
Supply per Capita (kg)	2.44	2.44	>-1%	2.39	-2%	

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

Major Pears Production Areas

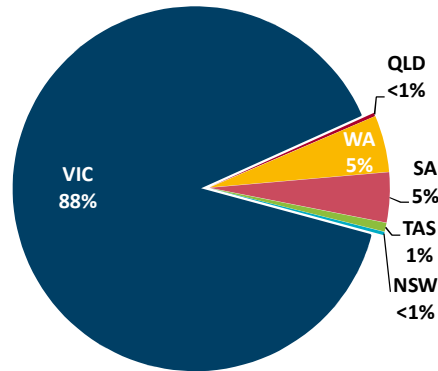
Pears are produced across Australia, although the majority of production occurs in Victoria around **Goulburn Valley**, **Yarra Valley** and **Gippsland**. Other growing areas also include **Stanthorpe** in Queensland; **Batlow** in New South Wales; the **Huon Valley** in Tasmania; **Adelaide Hills**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



Source: APAL



2016/17 Fresh Pears Production by State



Source: APAL

Fresh Pears Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	330	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	96,248	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	319	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	5,477	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	4,830	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	862	High	High	High	High	High	High	High	High	High	High	High	High
Imported	2,158	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

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.

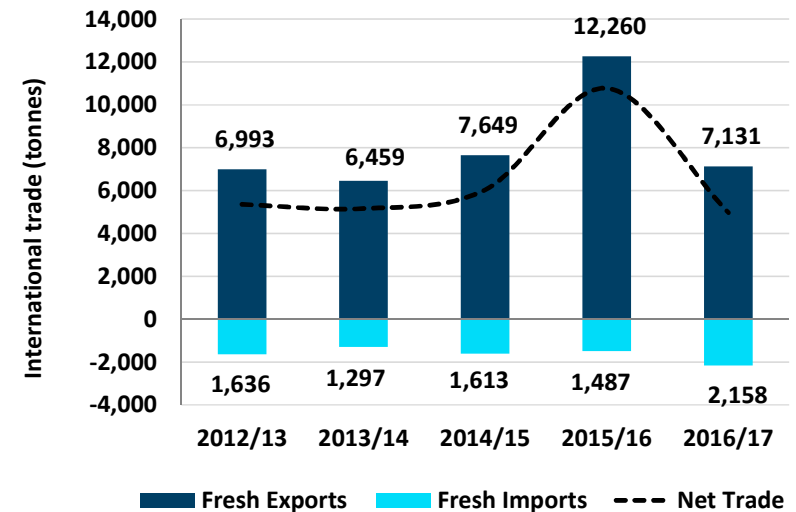
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	40,048	High	High	High	High	High	High	High	High	High	High	High	High
William	12,396	High	High	High	High	High	High	High	High	High	High	High	High
Beurre Bosc	6,357	High	High	High	High	High	High	High	High	High	High	High	High
Corella	636	High	High	High	High	High	High	High	High	High	High	High	High
Others	3,814	High	High	High	High	High	High	High	High	High	High	High	High
Processed	44,497	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

Source: APAL

Fresh Pears International Trade

For the year ending June 2017, Australia exported **7,131 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 Pears International Trade

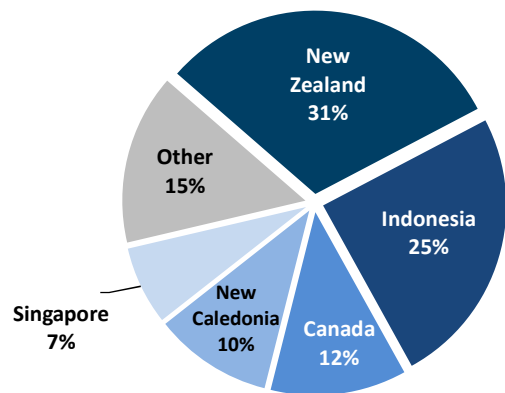


Source: GTA



For the year ending June 2017, **31%** of exported fresh pears were sent to New Zealand, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	798	769	973	Victoria	7,153	11,589	6,474
Victoria	726	628	964	Queensland	331	393	317
Queensland	90	90	222	New South Wales	117	154	202
TOTAL	1,613	1,487	2,158	Western Australia	27	93	65
				South Australia	1	< 0.5	6
				Other	19	31	68
				TOTAL	7,649	12,260	7,131

Fresh Pears Imports and Exports by Country

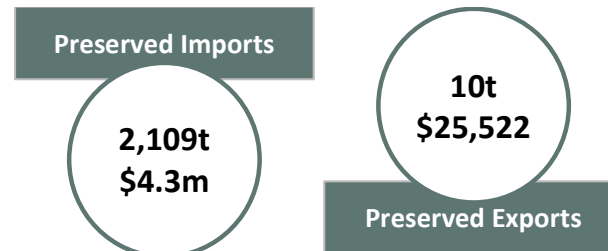
Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
China	1,505	1,374	1,959	New Zealand	2,066	2,985	2,205
Sth. Korea	88	113	200	Indonesia	1,924	4,700	1,757
Taiwan	19	-	-	Canada	1,306	998	855
Other	1	0	-	New Caledonia	631	625	747
TOTAL	1,613	1,487	2,158	Singapore	337	1,018	494
				Other	1,384	1,934	1,073
				TOTAL	7,649	12,260	7,131

Source: GTA



Processed Pears International Trade

For the year ending June 2017, an additional **2,109 tonnes** of preserved pears were imported, while **10 tonnes** were exported.



Source: GTA





Fresh Persimmons Overview

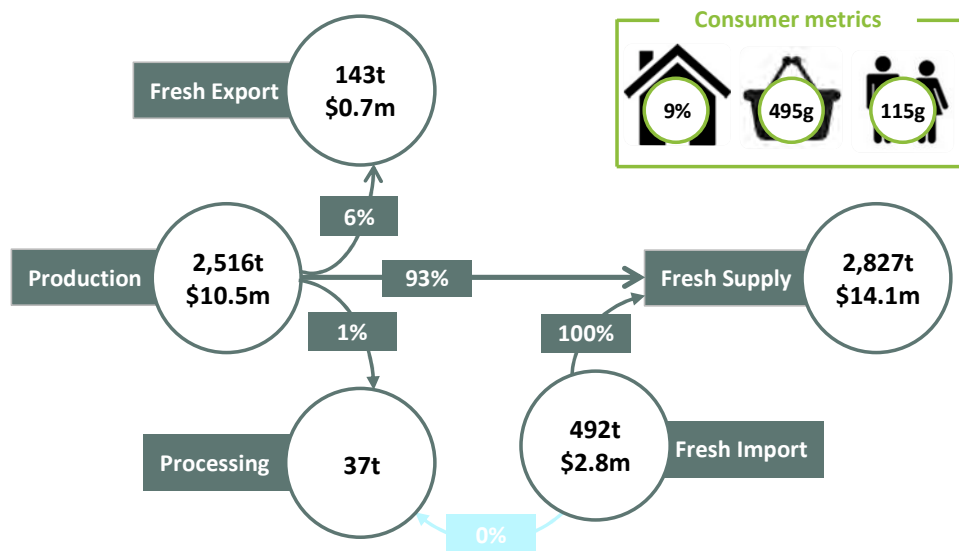
Persimmons are grown around Australia, with half of all production occurring in Queensland. There is a small export crop, but the majority of production is used in the fresh market.

For the year ending June 2017:

- **2,516 t** was produced.
- The value of production was **\$10.5 m** while the wholesale value of the fresh supply was **\$14.1 m**.
- **9%** of Australian households purchased fresh persimmons, buying an average of **495 g** per shopping trip.
- The supply per capita was **115 g**, based on the volume supplied.



Fresh Persimmons Supply Chain —Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	2,482	2,660	+7%	2,516	-5%	
Production (\$m)	\$ 8.4	\$ 10.3	+22%	\$ 10.5	+2%	
Production area (Ha)	-	-	-	-	-	
Fresh Export Volume (t)	162	195	+20%	143	-27%	
Fresh Export Value (\$m)	\$ 0.7	\$ 1.0	+41%	\$ 0.7	-29%	
Fresh Import Volume (t)	617	546	-11%	492	-10%	
Fresh Import Value (\$m)	\$ 2.7	\$ 2.9	+9%	\$ 2.8	-4%	
Fresh Supply (t)	2,755	2,932	+6%	2,827	-4%	
Fresh Supply Wholesale Value (\$m)	\$ 11.7	\$ 13.5	+16%	\$ 14.1	+4%	
Supply per Capita (kg)	0.12	0.12	+5%	0.12	-5%	

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

Major Persimmons Production Areas

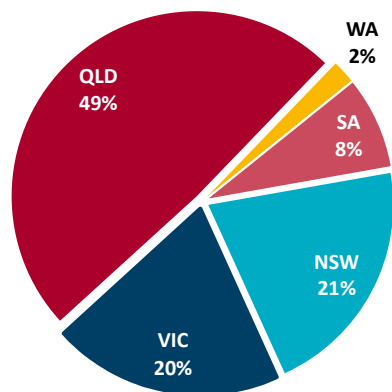
Persimmons are produced primarily in **south east Queensland**. Other major producing areas include **Sydney Basin** in New South Wales; **Sunraysia**, the **Goulburn** and **Murray valley** regions in Victoria, and **Riverland** around the South Australian and Victorian border.



Source: PAus



2016/17 Fresh Persimmons Production by State



Source: PAus

Fresh Persimmons Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	528									High	High	High	High
Victoria	503									High	High	High	High
Queensland	1,233								High	High	High	High	High
Western Australia	50									High	High	High	High
South Australia	201									High	High	High	High
Imported	617	High	High	High	High	High							High
Availability legend		High	High	High	High	High	Medium	Medium	Low	Low	None	None	None

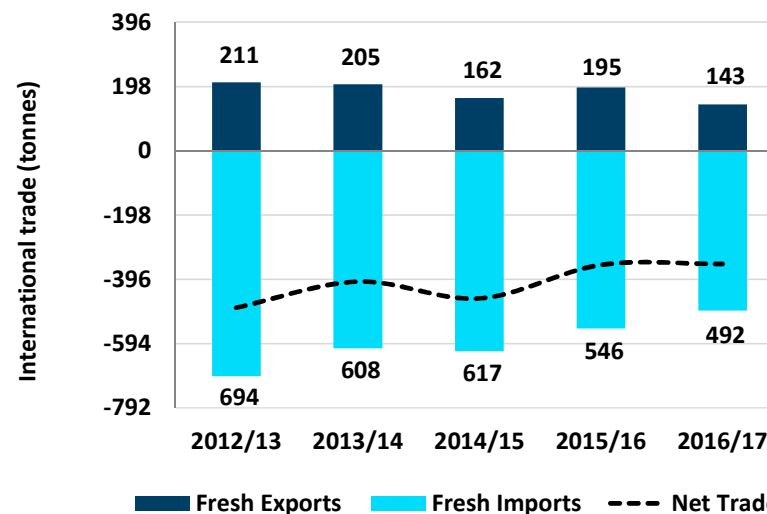
Source: PAus

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 2017, Australia exported **143 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.



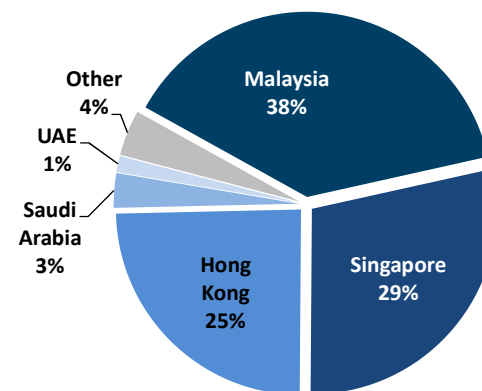
Net Fresh Persimmons International Trade



Source: GTA

For the year ending June 2017, **38%** of exported persimmons were sent to Malaysia, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	308	297	290	Queensland	108	121	89
Victoria	175	153	120	South Australia	31	38	29
Western Australia	87	49	65	Victoria	19	30	13
Queensland	47	47	17	New South Wales	3	6	7
TOTAL	617	546	492	Western Australia	<0.5	-	6
				Other	2	< 0.5	< 0.5
				TOTAL	162	195	143

Fresh Persimmons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New Zealand	606	544	479	Malaysia	85	83	55
US	11	2	13	Singapore	44	66	41
Other	-	< 0.5	-	Hong Kong	25	31	35
TOTAL	617	546	492	Saudi Arabia	2	3	4
				UAE	1	7	2
				Other	5	6	6
				TOTAL	162	195	143

Source: GTA





Fresh Pineapples Overview

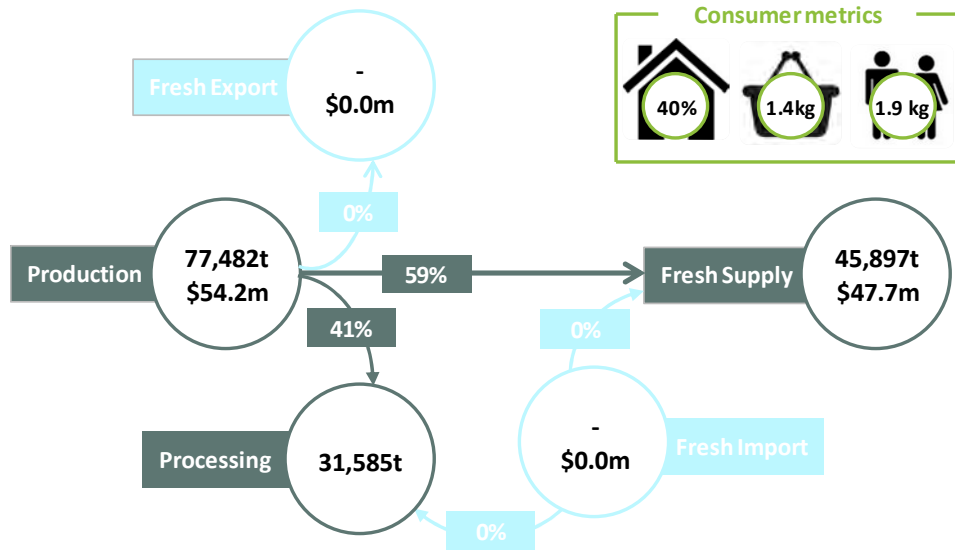
The majority of pineapple production occurs in Queensland. **41%** of pineapples grown in Australia in 2017 were sent to be processed, with the majority of this volume either tinned or juiced.



For the year ending June 2017:

- **77,482 t** was produced with **41%** sent to be processed.
- The value of production was **\$54.2 m** while the wholesale value of the fresh supply was **\$47.7 m**.
- **40%** of Australian households purchased fresh pineapples, buying an average of **1.4 kg** per shopping trip.
- The supply per capita was **1.9 kg**, based on the volume supplied.

Fresh Pineapples Supply Chain—Year Ending June 2017



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

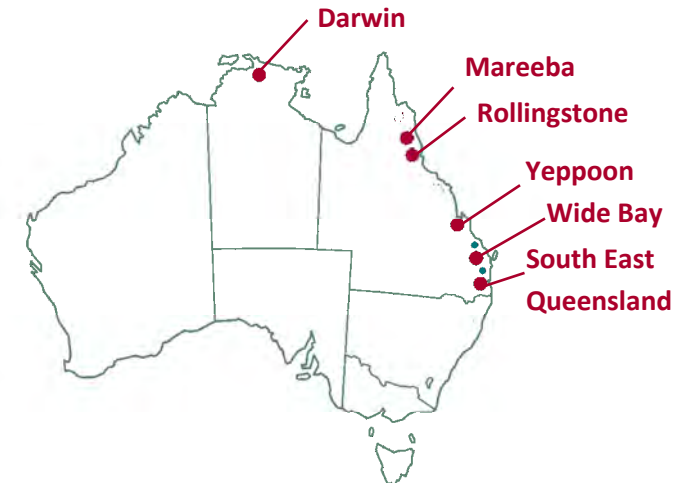


Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	67,434	75,376	+12%	77,482	+3%
Production (\$m)	\$ 52.4	\$ 55.0	+5%	\$ 54.2	-1%
Production area (Ha)	2,032	1,609	-21%	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	43,946	47,486	+8%	45,897	-3%
Fresh Supply Wholesale Value (\$m)	\$ 49.6	\$ 50.7	+2%	\$ 47.7	-6%
Supply per Capita (kg)	1.85	1.97	+7%	1.87	-5%

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

Major Pineapple Production Areas

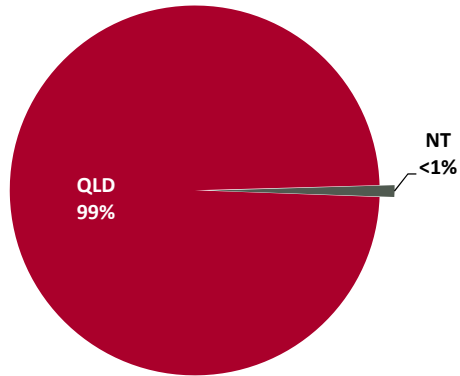
Pineapples are produced primarily in Queensland. The major producing areas include **South East Queensland** (from Beerwah to Wamuran), **Mareeba**, **Rollingstone**, **Yeppoon** and **Wide Bay** in Queensland and **Darwin** in NT.



Source: QDAF



2015/16 Fresh Pineapple Production by State



Sources: ABS; (Freshlogic Analysis)

Fresh Pineapple Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	76,707	High	High	High	Medium	Medium	Medium	Low	Low	Low	None	None	None
Northern Territory	775	None	None	None	Medium	Medium	Medium	Low	Low	Low	None	None	None
Availability legend		High	Medium		Low		None						

Source: (Freshlogic Analysis)

Processed Pineapple International Trade

For the year ending June 2017, an additional **20,428 tonnes** of preserved pineapples were imported, while **166 tonnes** were exported. Australia also imported **4,064 kilo litres** of pineapple juice, while exporting **1,706 kilo litres** of pineapple juice.



Source: GTA





Fresh Summerfruit Overview

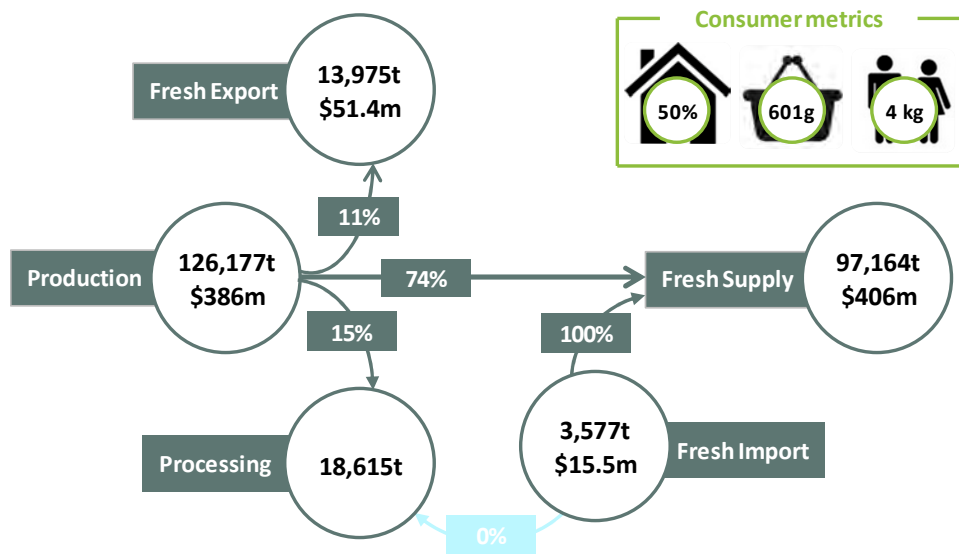
Pages 186-187 profile total summerfruit production and trade. They combine information on apricots, nectarines/peaches and plums. The following pages profile each summerfruit category in more detail.

For the year ending June 2017:

- **126,177 t** was produced.
- The value of production was **\$386.1 m** while the wholesale value of the fresh supply was **\$406.5 m**.
- **50%** of Australian households purchased a summerfruit, buying an average of **601 g** per shopping trip.
- The supply per capita of summerfruit was **4.0 kg**, based on the volume supplied.



Fresh Summerfruit Supply Chain—Year Ending June 2017



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



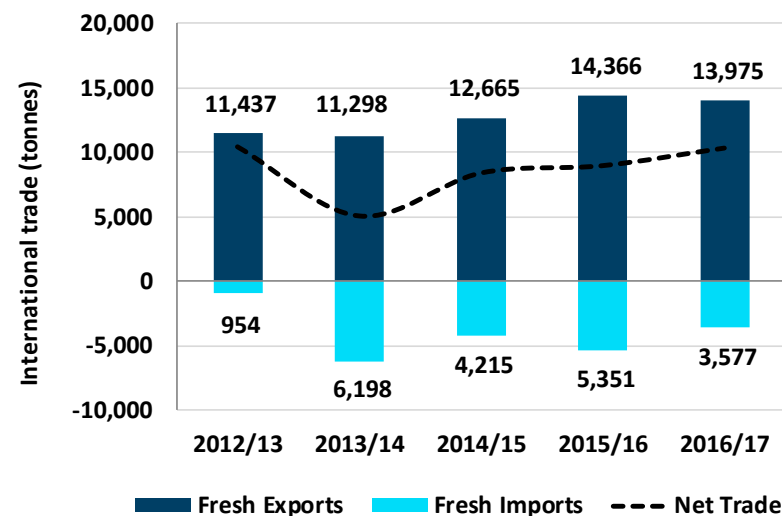
Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	126,326	134,115	+6%	126,177	-6%
Production (\$m)	\$ 327.9	\$ 368.2	+12%	\$ 386.1	+5%
Producing Trees (000 Trees)	5,240	5,488	+5%	-	-
Fresh Export Volume (t)	12,665	14,366	+13%	13,975	-3%
Fresh Export Value (\$m)	\$ 38.7	\$ 48.3	+25%	\$ 51.4	+7%
Fresh Import Volume (t)	4,215	5,351	+27%	3,577	-33%
Fresh Import Value (\$m)	\$ 18.6	\$ 24.1	+30%	\$ 15.5	-36%
Fresh Supply (t)	100,531	102,853	+2%	97,164	-6%
Fresh Supply Wholesale Value (\$m)	\$ 354.3	\$ 393.1	+11%	\$ 406.5	+3%
Supply per Capita (kg)	4.23	4.27	<1%	3.96	-7%

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 2017 Australia exported **13,975 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

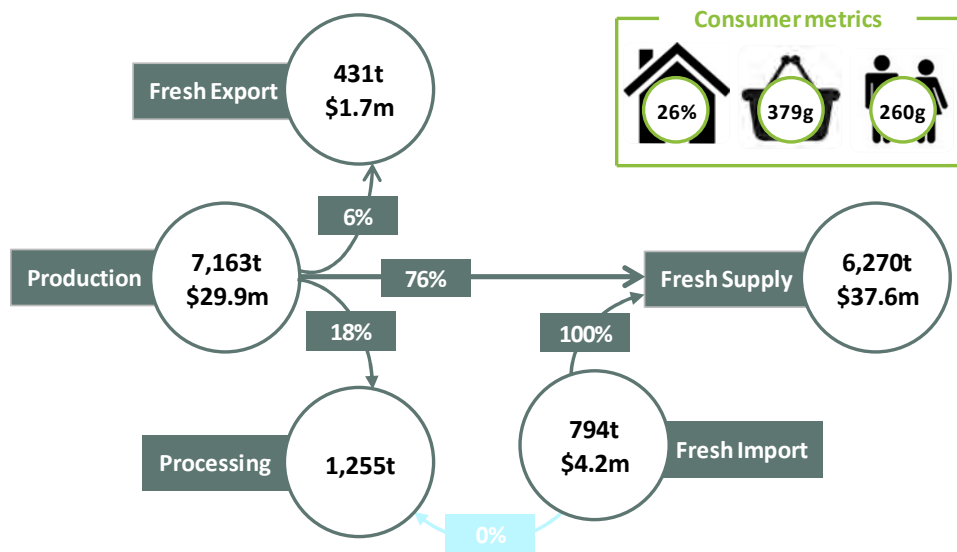
The majority of apricot production occurs in the southern states. Approximately a fifth of apricots grown in Australia are sent to be processed, either tinned or dried.

For the year ending June 2017:

- **7,163 t** was produced with **18%** sent to be processed.
- The value of production was **\$29.9 m** while the wholesale value of the fresh supply was **\$37.6 m**.
- **26%** of Australian households purchased fresh apricots, buying an average of **379 g** per shopping trip.
- The supply per capita was **260 g**, based on the volume supplied.



Fresh Apricots Supply Chain—Year Ending June 2017



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

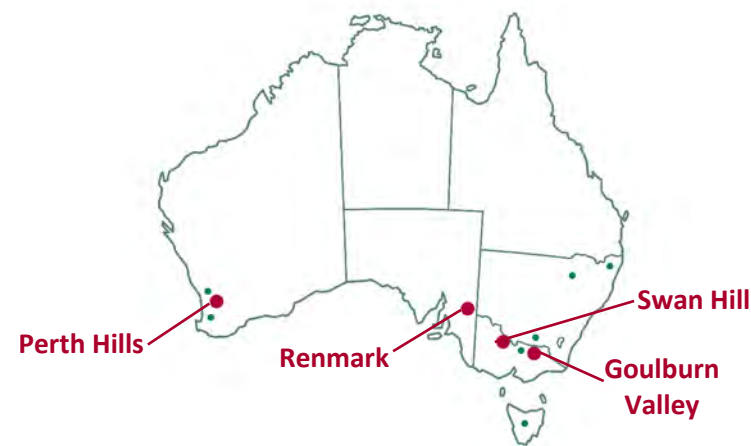


Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	7,477	7,392	-1%	7,163	-3%	
Production (\$m)	\$ 24.8	\$ 31.8	+28%	\$ 29.9	-6%	
Producing Trees (000 Trees)	501	501	-	-	-	
Fresh Export Volume (t)	498	601	+21%	431	-28%	
Fresh Export Value (\$m)	\$ 1.7	\$ 2.5	+53%	\$ 1.7	-34%	
Fresh Import Volume (t)	711	900	+27%	794	-12%	
Fresh Import Value (\$m)	\$ 3.6	\$ 4.7	+33%	\$ 4.2	-12%	
Fresh Supply (t)	6,342	6,359	<1%	6,270	-1%	
Fresh Supply Wholesale Value (\$m)	\$ 30.3	\$ 39.8	+31%	\$ 37.6	-6%	
Supply per Capita (kg)	0.27	0.26	-1%	0.26	-3%	

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

Major Apricots Production Areas

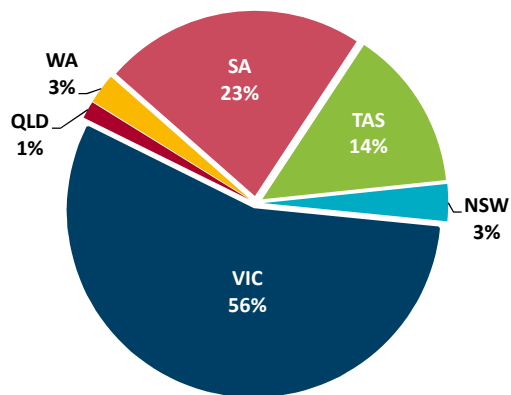
Apricots are primarily produced in the southern states. More than half of production occurs in Victoria, in the **Goulburn Valley** and **Swan Hill** areas. Other major producing areas include **Renmark** in South Australia, and **Perth Hills** in Western Australia.



Source: SAL



2016/17 Fresh Apricots Production by State



Source: SAL

Fresh Apricots Seasonality by State

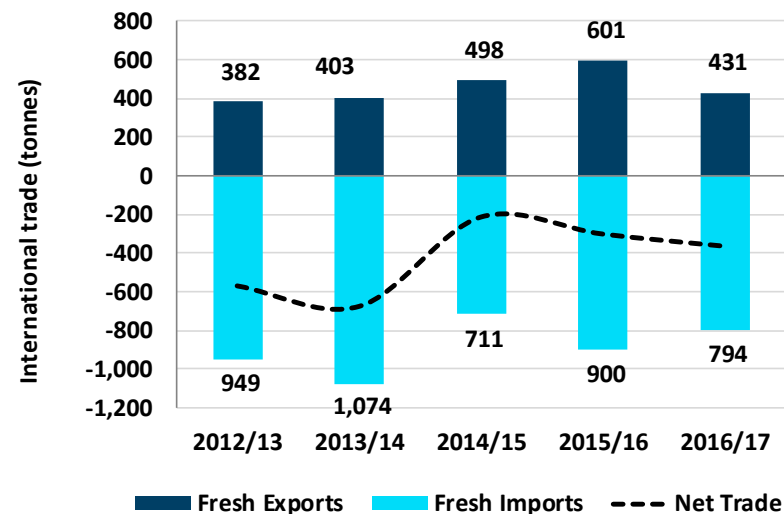
State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	232					Low	Medium	High	High	Medium			
Victoria	3,993					Low	Medium	High	High	Medium			
Queensland	108					Low	Medium	High	High	Medium			
Western Australia	189					Low	Medium	High	High	Medium			
South Australia	1,634					Low	Medium	High	High	Medium			
Tasmania	1,007											Low	None
Imported	794	Low	Low										
Availability legend		High	Medium	Low	None								

Source: SAL

Fresh Apricots International Trade

Australia is a net importer of fresh apricots, typically importing between 700-1,000 tonnes per year. For the year ending June 2017, Australia imported **794 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.

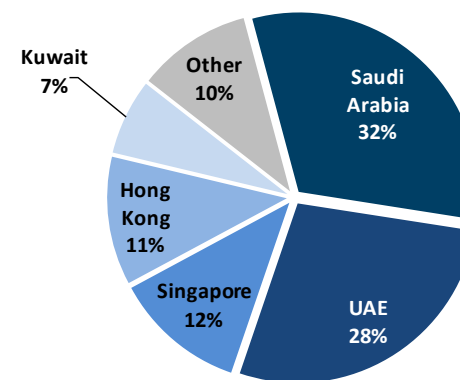
Net Fresh Apricot International Trade



Source: GTA

For the year ending June 2017, **32%** of exported fresh apricots were sent to Saudi Arabia, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	268	418	411	Victoria	382	500	325
Victoria	262	223	169	New South Wales	51	32	73
Queensland	60	123	111	Tasmania	< 0.5	1	12
Western Australia	122	135	104	Northern Territory	-	1	8
TOTAL	711	900	794	Queensland	13	11	7
				Other	52	57	7
				TOTAL	498	601	431

Fresh Apricots Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New Zealand	648	858	793	Saudi Arabia	51	151	136
US	-	-	1	UAE	208	232	120
Turkey	63	42	-	Singapore	33	47	51
China	< 0.5	< 0.5	-	Hong Kong	128	30	50
Other	< 0.5	< 0.5	0	Kuwait	28	45	30
TOTAL	711	900	794	Other	50	95	44
				TOTAL	498	601	431

Source: GTA

Processed Apricots International Trade

For the year ending June 2017, an additional **4,063 tonnes** of dried apricots and **2,894 tonnes** of preserved apricots were imported, while **56 tonnes** of dried apricots and **35 tonnes** of preserved apricots were exported.



Source: GTA



Fresh Nectarines/ Peaches

Overview

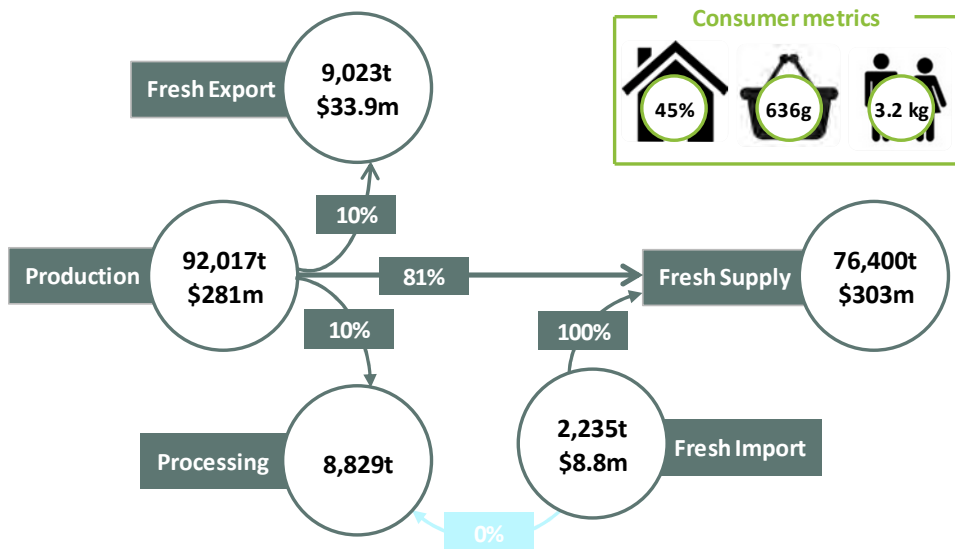
The majority of nectarine and peach production occurs in the south of Australia, with Victoria being the major producing state.

For the year ending June 2017:

- **92,017 t** was produced with **10%** sent to be processed.
- The value of production was worth **\$281.4 m** while the wholesale value of the fresh supply was **\$303.0 m**.
- **45%** of Australian households purchased fresh nectarines and peaches, buying an average of **636 g** per shopping trip.
- The supply per capita was **3.2 kg**, based on the volume supplied.



Fresh Nectarines/Peaches Supply Chain—Year Ending June 2017



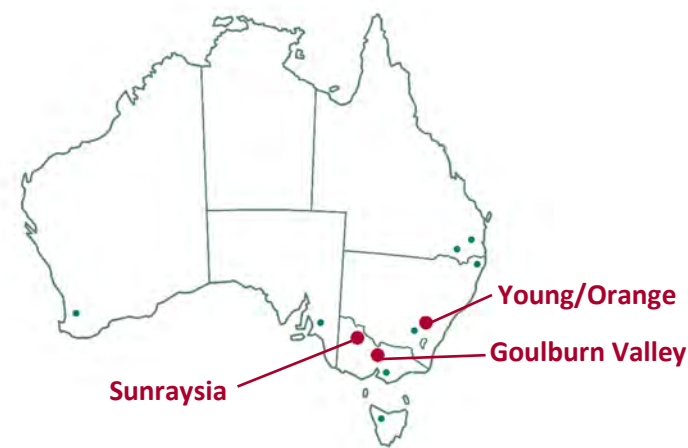
Sources: ABS; AC; CFVIWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)

Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	95,200	97,842	+3%	92,017	-6%	
Production (\$m)	\$ 251.3	\$ 272.4	+8%	\$ 281.4	+3%	
Producing Trees (000 Trees)	3,315	3,562	+7%	-	-	
Fresh Export Volume (t)	8,581	10,018	+17%	9,023	-10%	
Fresh Export Value (\$m)	\$ 26.5	\$ 33.8	+27%	\$ 33.9	<1%	
Fresh Import Volume (t)	3,442	3,653	+6%	2,235	-39%	
Fresh Import Value (\$m)	\$ 14.7	\$ 15.4	+5%	\$ 8.8	-43%	
Fresh Supply (t)	80,380	82,062	+2%	76,400	-7%	
Fresh Supply Wholesale Value (\$m)	\$ 278.0	\$ 296.8	+7%	\$ 303.0	+2%	
Supply per Capita (kg)	3.38	3.40	<1%	3.17	-7%	

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

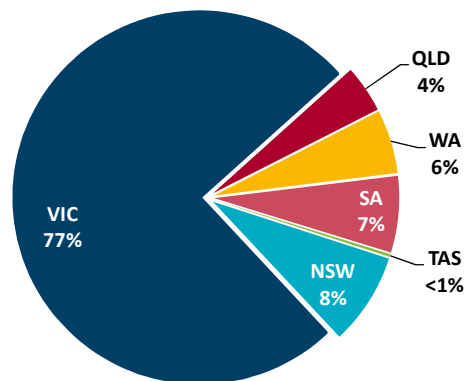
Major Nectarine/Peach Production Areas

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

2016/17 Fresh Nectarines/Peaches Production by State



Source: SAL

Fresh Nectarines/Peaches Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	7,413												
Victoria	70,139												
Queensland	3,802												
Western Australia	4,263												
South Australia	6,174												
Tasmania	227												
Imported	2,235												
Availability legend		High	Medium	Low	None								

Source: SAL

Main Categories

Nectarines accounted for **60%** of combined production for the year ending June 2017.

Peaches accounted for **40%** of combined production for the year ending June 2017.

Seasonality by Category

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

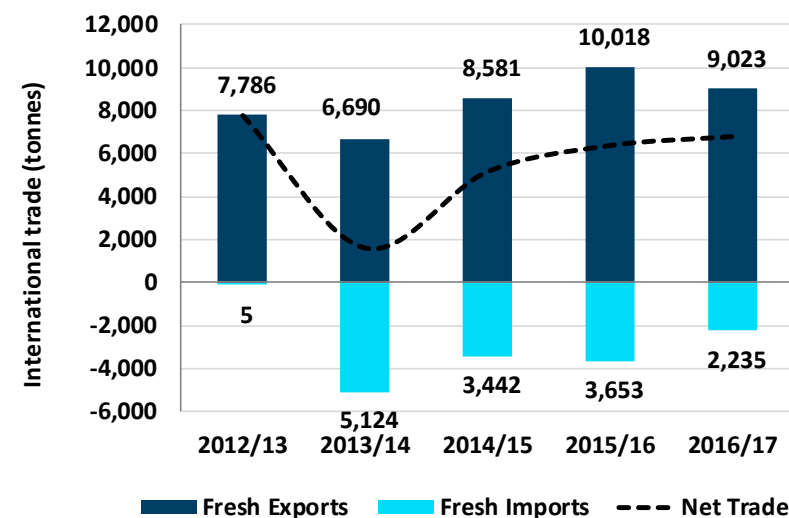
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Nectarines	55,106												
Peaches	36,911												
Availability legend		High	Medium	Low	None								

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 2017, Australia exported **9,023 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

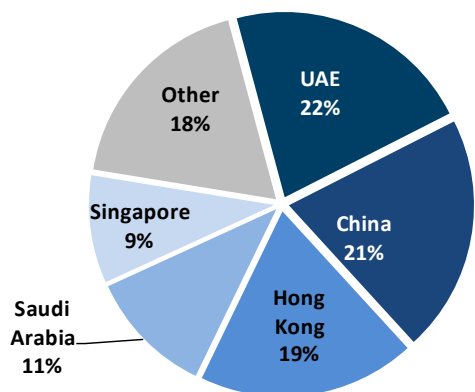
Net Fresh Nectarines/Peaches International Trade



Source: GTA

For the year ending June 2017, **22%** of exported fresh nectarines and peaches were sent to UAE, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	1,421	1,715	1,285	Victoria	7,359	8,921	7,355
Western Australia	549	704	407	New South Wales	617	430	874
Victoria	947	734	394	Queensland	125	267	206
Queensland	525	499	148	South Australia	156	125	165
Other	-	-	< 0.5	Northern Territory	-	16	120
TOTAL	3,442	3,653	2,235	Other	323	259	303
				TOTAL	8,581	10,018	9,023

Fresh Nectarines/Peaches Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	3,442	3,653	2,201	UAE	2,129	2,343	1,957
China	< 0.5	< 0.5	34	China	-	-	1,866
Other	< 0.5	< 0.5	-	Hong Kong	3,755	4,434	1,711
TOTAL	3,442	3,653	2,235	Saudi Arabia	395	707	991
				Singapore	983	965	849
				Other	1,319	1,569	1,649
				TOTAL	8,581	10,018	9,023

Source: GTA

Processed Nectarines/Peaches International Trade

For the year ending June 2017, an additional **8,591 tonnes** of preserved peaches were imported, while **115 tonnes** were exported.



Source: GTA





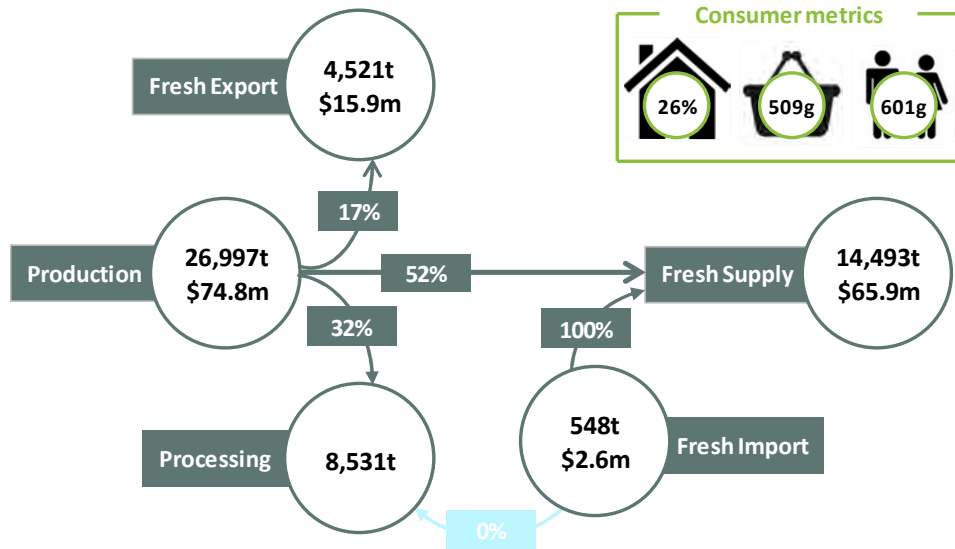
Fresh Plums Overview

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

For the year ending June 2017:

- **26,997 t** was produced.
- The value of production was **\$74.8 m** while the wholesale value of the fresh supply was **\$65.9 m**.
- **26%** of Australian households purchased fresh plums, buying an average of **509 g** per shopping trip.
- The supply per capita was **601 g**, based on the volume supplied.

Fresh Plums Supply Chain—Year Ending June 2017



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

Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	23,649	28,881	+22%	26,997	-7%	
Production (\$m)	\$ 51.9	\$ 64.0	+23%	\$ 74.8	+17%	
Producing Trees (000 Trees)	1,425	1,425	-	-	-	
Fresh Export Volume (t)	3,586	3,748	+5%	4,521	+21%	
Fresh Export Value (\$m)	\$ 10.5	\$ 11.9	+14%	\$ 15.9	+33%	
Fresh Import Volume (t)	62	798	>100%	548	-31%	
Fresh Import Value (\$m)	\$ 0.3	\$ 4.0	>100%	\$ 2.6	-34%	
Fresh Supply (t)	13,809	14,432	+5%	14,493	<1%	
Fresh Supply Wholesale Value (\$m)	\$ 45.9	\$ 56.4	+23%	\$ 65.9	+17%	
Supply per Capita (kg)	0.58	0.60	+3%	0.60	<1%	

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

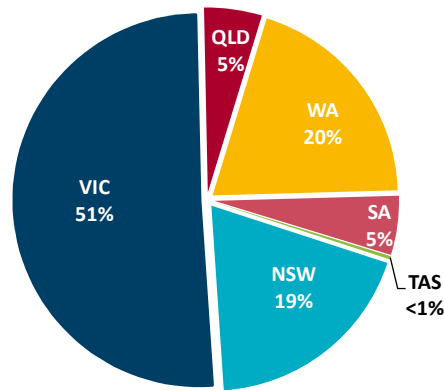
Major Plum Production Areas

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

2016/17 Fresh Plums Production by State



Source: SAL

Fresh Plums Seasonality by State

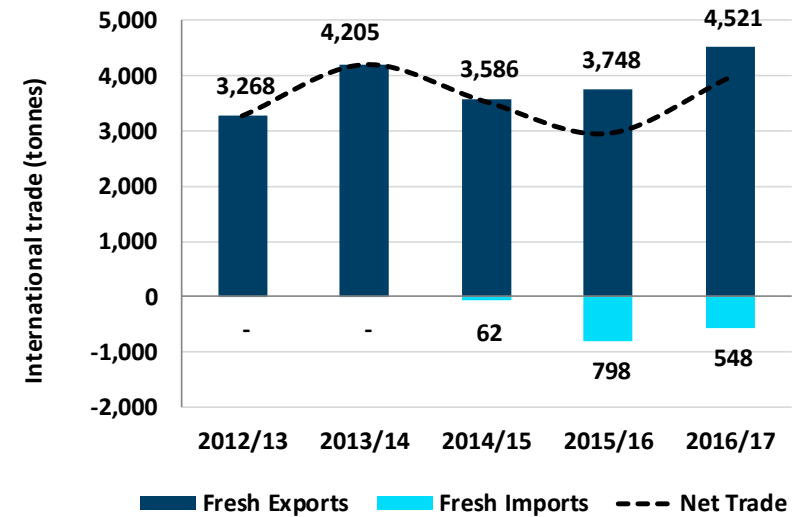
State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,110												
Victoria	13,695												
Queensland	1,367												
Western Australia	5,357												
South Australia	1,394												
Tasmania	75												
Imported	548												
Availability legend			High		Medium		Low						None

Source: SAL

Fresh Plums International Trade

Australia is a net exporter of fresh plums, typically exporting between 3,000-4,500 tonnes per year. For the year ending June 2017, Australia exported **4,521 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.

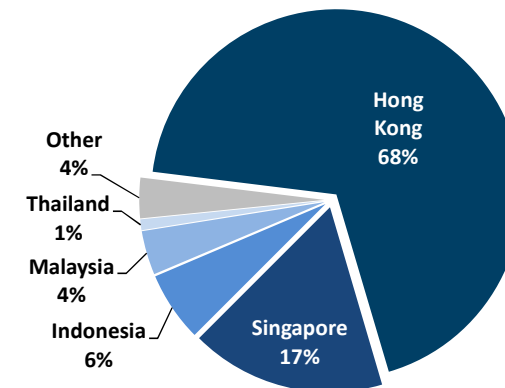
Net Fresh Plums International Trade



Source: GTA

For the year ending June 2017, **68%** of exported fresh plums were sent to Hong Kong, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	34	354	254	Victoria	1,810	1,545	2,088
Victoria	11	197	148	New South Wales	929	851	1,830
Western Australia	13	149	86	Western Australia	668	1,038	437
Queensland	4	99	60	Queensland	90	142	48
TOTAL	62	798	548	South Australia	36	119	46
				Other	53	51	71
				TOTAL	3,586	3,748	4,521

Fresh Plums Imports and Exports by Country

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	57	798	548	Hong Kong	2,076	1,948	3,096
Iran	-	-	< 0.5	Singapore	835	1,011	772
Singapore	-	-	< 0.5	Indonesia	114	164	276
Serbia	5	-	-	Malaysia	208	214	174
Other	-	-	< 0.5	Thailand	37	30	43
TOTAL	62	798	548	Other	318	382	160
				TOTAL	3,586	3,748	4,521

Source: GTA





Fresh Table Grapes Overview

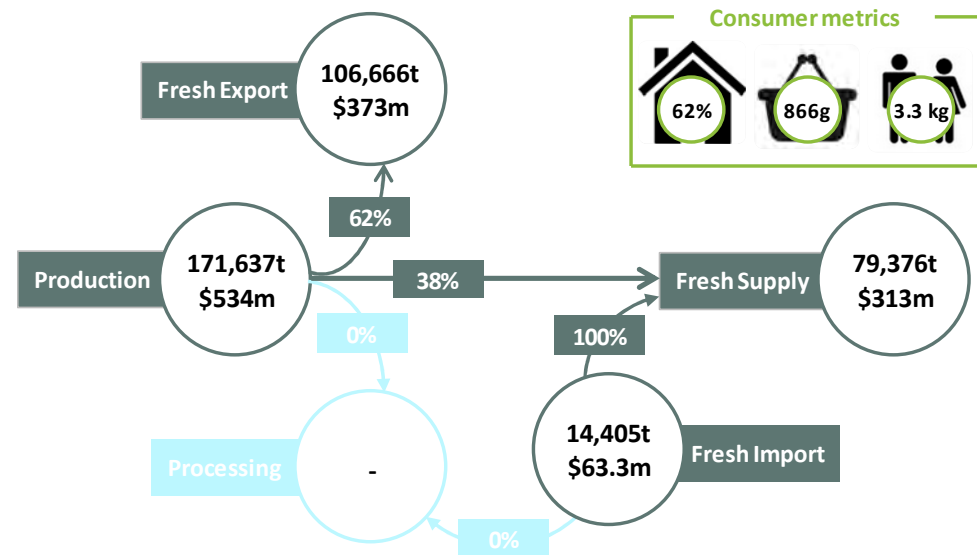
Table grapes are grown across all states of Australia, with Victoria being the major producing state.

For the year ending June 2017:

- **171,637 t** was produced.
- The value of production was **\$534.4 m** while the wholesale value of the fresh supply was **\$312.8 m**.
- **62%** of Australian households purchased table grapes, buying an average of **866 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 2017



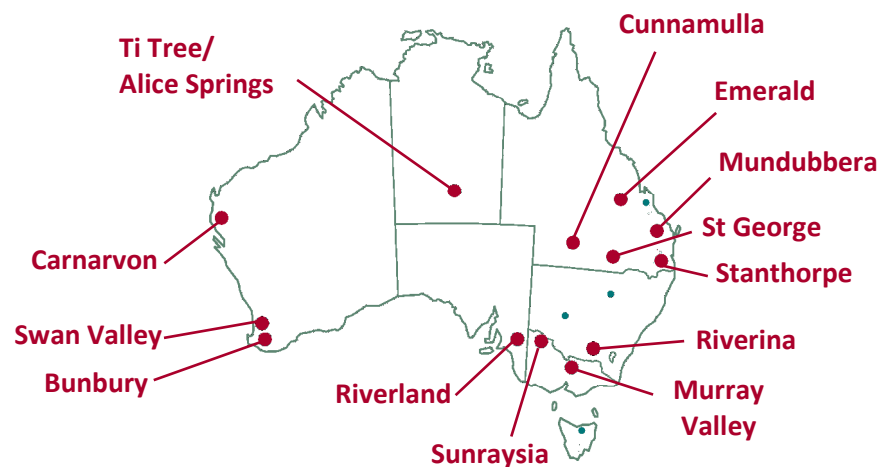
Sources: AC, Australian Table Grape Association (ATGA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	160,168	178,595	+12%	171,637	-4%
Production (\$m)	\$ 400.5	\$ 514.5	+28%	\$ 534.4	+4%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	84,103	110,007	+31%	106,666	-3%
Fresh Export Value (\$m)	\$ 240.2	\$ 367.3	+53%	\$ 372.7	+1%
Fresh Import Volume (t)	17,766	13,784	-22%	14,405	+5%
Fresh Import Value (\$m)	\$ 72.3	\$ 66.1	-8%	\$ 63.3	-4%
Fresh Supply (t)	93,830	82,372	-12%	79,376	-4%
Fresh Supply Wholesale Value (\$m)	\$ 284.9	\$ 285.8	<1%	\$ 312.8	+9%
Supply per Capita (kg)	3.95	3.42	-13%	3.29	-4%

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

Major Table Grape Production Areas

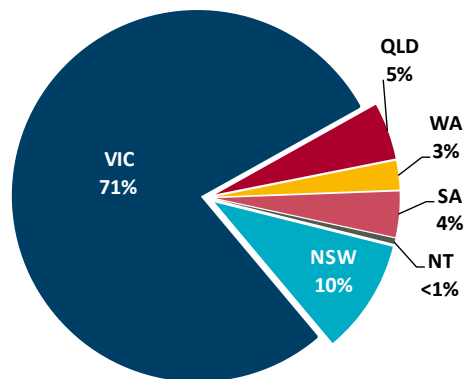
Table grapes are produced in all Australian states. The majority of production occurs in Victoria, in the **Sunraysia** and **Murray Valley** areas. Other major producing areas include: the **Riverland** in South Australia; **Carnarvon, Swan Valley** and **Bunbury** in Western Australia; **Ti Tree/Alice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



Source: ATGA



2016/17 Fresh Table Grapes Production by State



Source: ATGA

Fresh Table Grapes Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	17,164												
Victoria	133,877												
Queensland	8,582												
Western Australia	4,308												
South Australia	6,865												
Northern Territory	841												
Imported	14,405												
Availability legend			High		Medium		Low						None

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 2017.

Crimson, **Flame** and **Globe**, the main red varieties in Australia. These three varieties accounted for **32%** of fresh production.

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

Other varieties accounted for the remaining 28% of fresh production.



Seasonality by Table Grape Variety

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

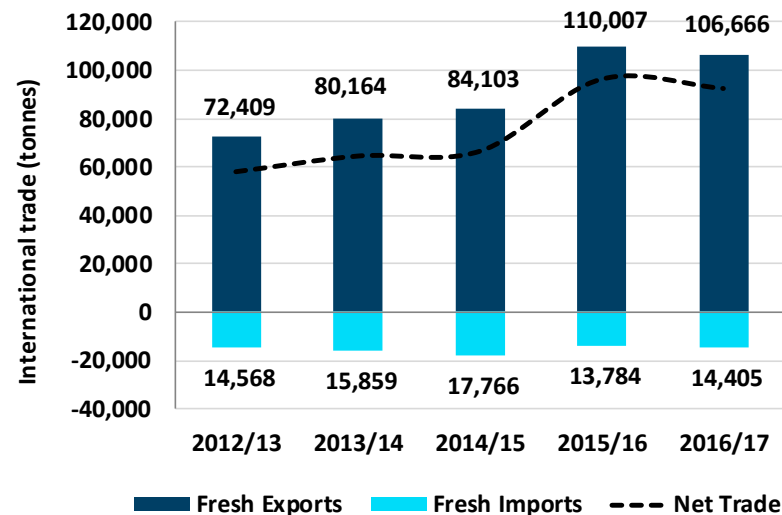
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Menindee	22,313												
White - Thompson	42,909												
Red - Crimson	36,044												
Red - Flame	10,298												
Red - Globe	8,582												
Black - Midnight	3,405												
Other	48,086												
Availability legend			High		Medium		Low						None

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 2017, Australia exported **106,666 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

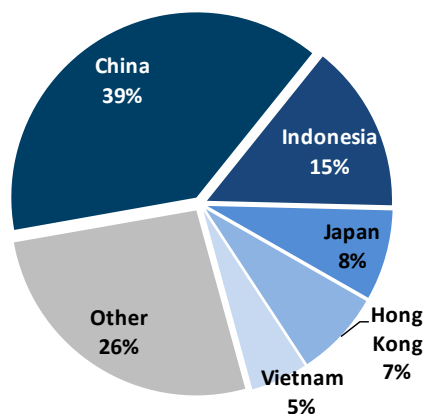


Source: GTA



For the year ending June 2017, **39%** of exported fresh table grapes were sent to China, as profiled in the chart below.

2016/17 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	2015	2016	2017	Year Ending June	2015	2016	2017
Victoria	6,950	6,000	6,198	Victoria	78,450	101,735	99,911
New South Wales	6,133	4,904	5,698	New South Wales	3,586	5,273	5,623
Western Australia	2,228	1,224	1,439	Northern Territory	-	47	472
Queensland	2,387	1,575	1,058	South Australia	683	628	255
South Australia	67	80	12	Queensland	800	1,691	238
Other	-	-	< 0.5	Other	585	633	168
TOTAL	17,766	13,784	14,405	TOTAL	84,103	110,007	106,666

Fresh Table Grapes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
US	17,741	13,711	14,382	China	4,892	29,936	41,114
Sth. Korea	25	53	23	Indonesia	13,204	17,363	15,586
Other	-	0	21	Japan	2,394	9,383	8,397
TOTAL	17,766	13,784	14,405	Hong Kong	29,659	13,097	8,013
				Vietnam	5	4,285	5,287
				Other	33,950	35,943	28,269
				TOTAL	84,103	110,007	106,666

Source: GTA





Dried Grapes Overview

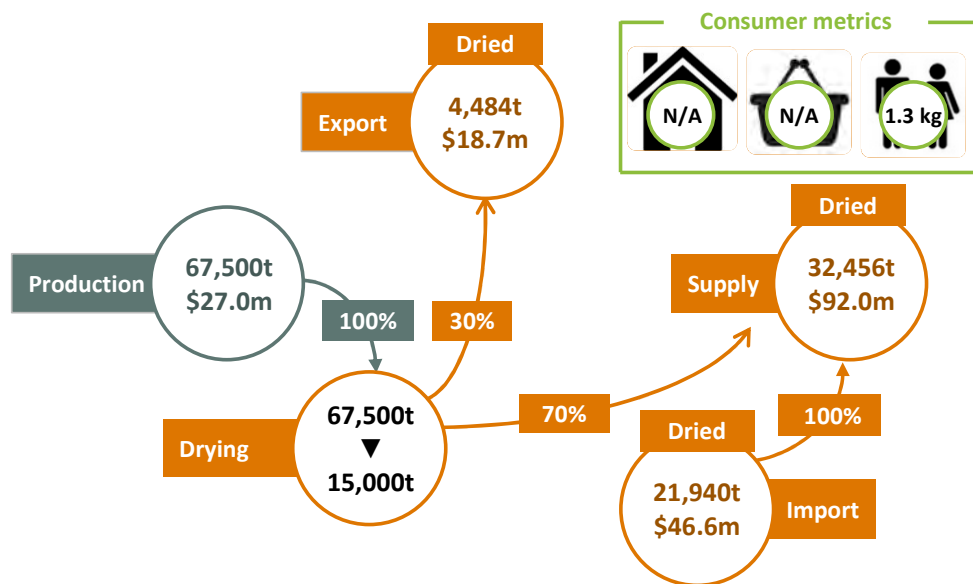
Grapes grown for drying are predominantly grown in Victoria and New South Wales with **Sunraysia** being the major producing area. The main varieties grown for dried grapes include sultanas, currants and raisins.



For the year ending June 2017:

- **67,500 t** of fresh grapes were produced for drying, which after drying accounted for **15,000 tonnes** of dried grapes.
- The value of production of the fresh grapes grown for drying was **\$27 m**, while the wholesale value of the dried supply was **\$92.0 m**.
- The dried supply per capita was **1.32 kg**, based on the volume supplied.

Dried Grapes Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	16,307	18,309	+12%	15,000	-18%
Production (\$m)	\$ 28.3	\$ 33.0	+17%	\$ 27.0	-18%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	2,518	5,000	+99%	4,484	-10%
Dried Export Value (\$m)	\$ 10.3	\$ 19.4	+88%	\$ 18.7	-4%
Dried Import Volume (t)	22,064	20,259	-8%	21,940	+8%
Dried Import Value (\$m)	\$ 49.6	\$ 52.1	+5%	\$ 46.6	-11%
Dried Supply (t)	35,852	33,569	-6%	32,456	-3%
Dried Supply Wholesale Value (\$m)	\$ 94.3	\$ 101.5	+8%	\$ 92.0	-9%
Supply per Capita (kg)	1.51	1.39	-8%	1.32	-5%

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

Major Dried Grape Production Areas

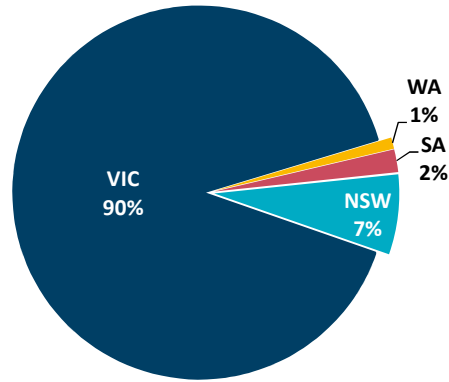
The majority of production of table grapes for drying occurs in Victoria, particularly in the **Sunraysia** area of Victoria, including the **Mildura** region and along the **Murray** and **Darling Rivers** south west of New South Wales.



Source: DFA



2016/17 Dried Grapes Production by State



Source: DFA

Dried Grapes Production Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	4,725						High	Medium	Low				
Victoria	60,750					High	Medium	Low					
Western Australia	675						High	Medium	Low				
South Australia	1,350						High	Medium	Low				
Fresh production legend			High	Medium	Low								None

Source: DFA

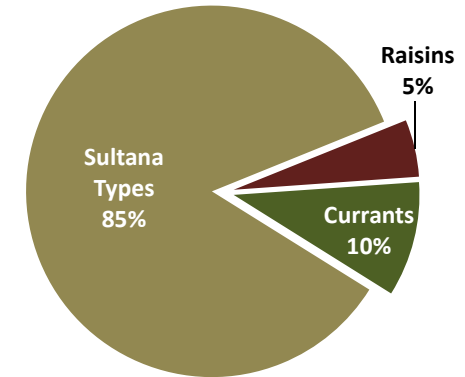
Main Dried Grape Varieties

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.

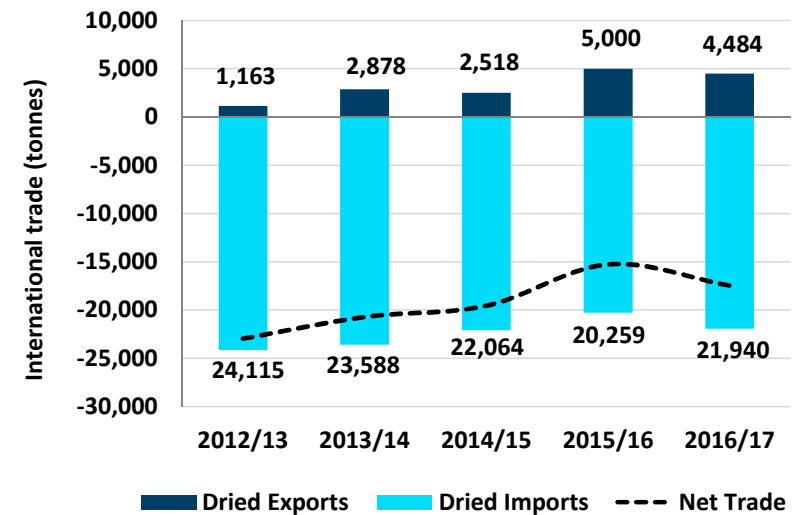
2016/17 Main Dried Grape Varieties



Source: DFA

Processed Dried Grapes International Trade

For the year ending June 2017, Australia imported **21,940 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

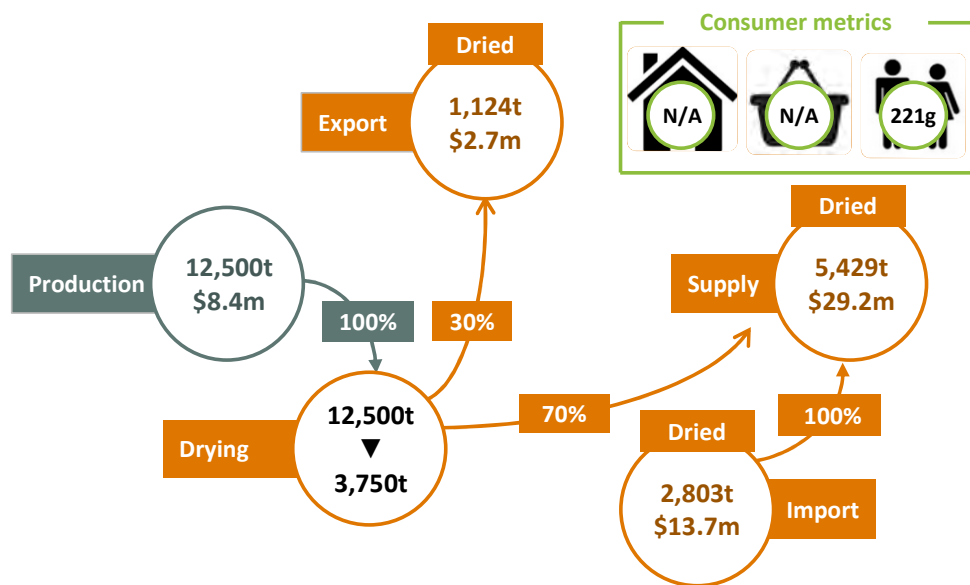
Plums grown for drying are predominantly grown in New South Wales and Victoria, with **Griffith** being the major producing area.



For the year ending June 2017:

- **12,500 t** of fresh plums were produced for drying, which after drying accounted for **3,750 tonnes** of prunes.
- The value of production of the fresh plums grown for drying was **\$8.4 m**, while the wholesale value of the dried supply was **\$29.2 m**.
- The dried supply per capita was **221 g**, based on the volume supplied.

Prunes Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	1,698	3,286	+93%	3,750	+14%
Production (\$m)	\$ 3.2	\$ 7.9	>100%	\$ 8.4	+7%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	1,285	1,035	-19%	1,124	+9%
Dried Export Value (\$m)	\$ 2.4	\$ 2.4	+2%	\$ 2.7	+9%
Dried Import Volume (t)	1,540	2,705	+76%	2,803	+4%
Dried Import Value (\$m)	\$ 8.6	\$ 14.2	+64%	\$ 13.7	-3%
Dried Supply (t)	1,953	4,955	>100%	5,429	+10%
Dried Supply Wholesale Value (\$m)	\$ 12.0	\$ 28.5	>100%	\$ 29.2	+2%
Supply per Capita (kg)	0.08	0.21	>100%	0.22	+8%

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

Major Prunes Production Areas

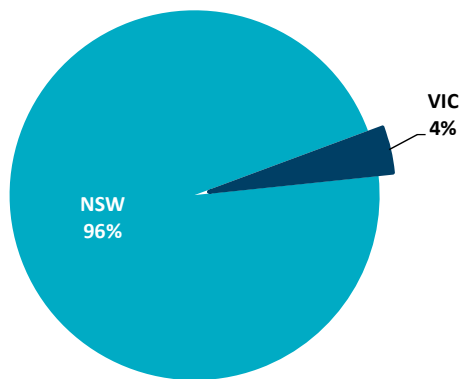
The majority of production of plums for drying occurs in New South Wales, particularly in the **Griffith** region. Other producing regions include Young in NSW and Cobram in Victoria.



Source: DFA



2016/17 Prunes Production by State



Source: DFA

Prunes Production Seasonality by State

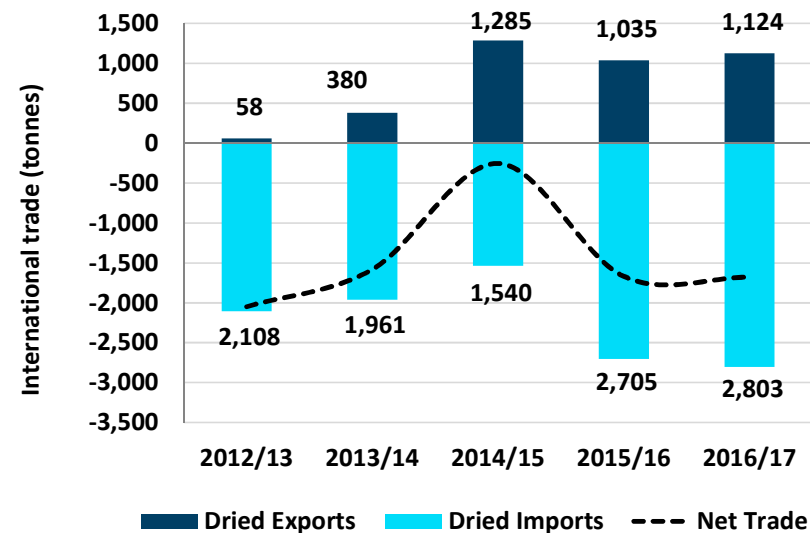
State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	12,000												
Victoria	500												
Fresh production legend			High		Medium		Low						None

Source: DFA



Processed Prunes International Trade

For the year ending June 2017, Australia imported **2,803 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

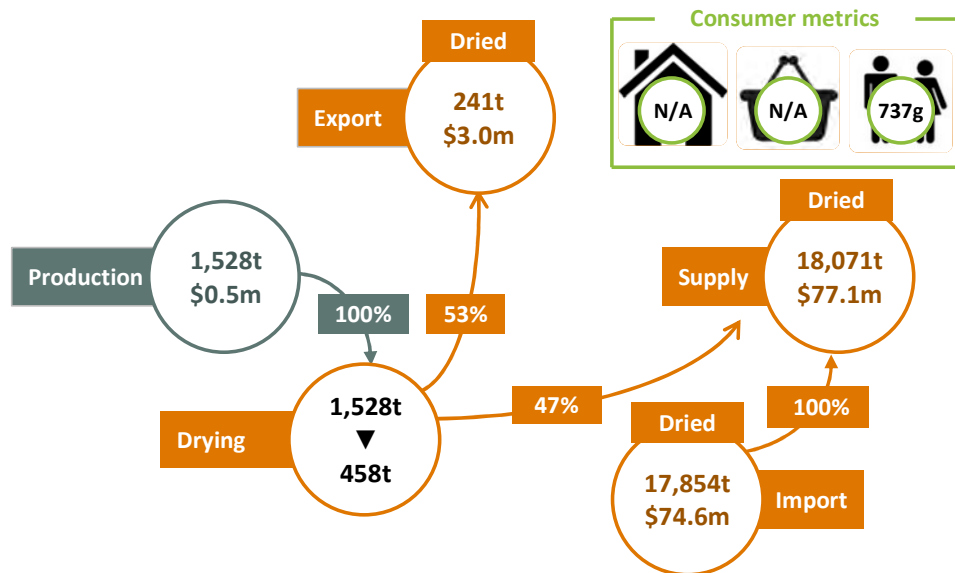
Dried Tree Fruits other than plums are a combination of dried fruits from different categories, predominantly summerfruit. The majority of the fruit grown for this category are from **Riverland**, **Sunraysia** and **Goulburn** regions.



For the year ending June 2017:

- **1,528 t** of fresh tree fruit were produced for drying, which after drying accounted for **458 tonnes** of dried tree fruit.
- The value of production of the fresh tree fruit grown for drying was **\$0.5 m**, while the wholesale value of the dried supply was **\$77.1 m**.
- The dried supply per capita was **737 g**, based on the volume supplied.

Dried Tree Fruit Supply Chain—Year Ending June 2017



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



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	401	385	-4%	458	+19%
Production (\$m)	\$ 0.4	\$ 0.4	+5%	\$ 0.5	+41%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	220	229	+4%	241	+6%
Dried Export Value (\$m)	\$ 2.4	\$ 3.7	+54%	\$ 3.0	-19%
Dried Import Volume (t)	16,507	18,193	+10%	17,854	-2%
Dried Import Value (\$m)	\$ 78.9	\$ 82.7	+5%	\$ 74.6	-10%
Dried Supply (t)	16,688	18,349	+10%	18,071	-2%
Dried Supply Wholesale Value (\$m)	\$ 80.7	\$ 85.0	+5%	\$ 77.1	-9%
Supply per Capita (kg)	0.70	0.76	+8%	0.74	-3%

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

*Note: Wholesale Value has been modified from the quoted values published in the previous edition of the handbook (2015/16 edition).

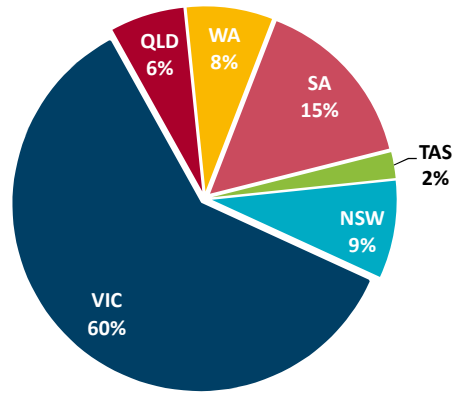
Major Dried Tree Fruit Production Areas

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

2016/17 Dried Tree Fruit Production by State



Source: DFA

Fresh Tree Fruit Production for drying—Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	129												
Victoria	909												
Queensland	98												
Western Australia	113												
South Australia	230												
Tasmania	34												
Fresh production legend		High		Medium		Low		None					

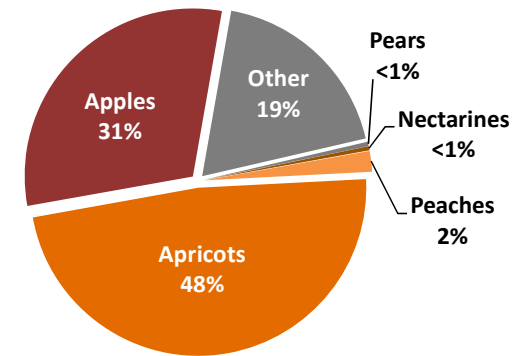
Source: DFA

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 **48%** of production.
- Apples** grown for drying accounted for **31%** 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 **19%** of production.

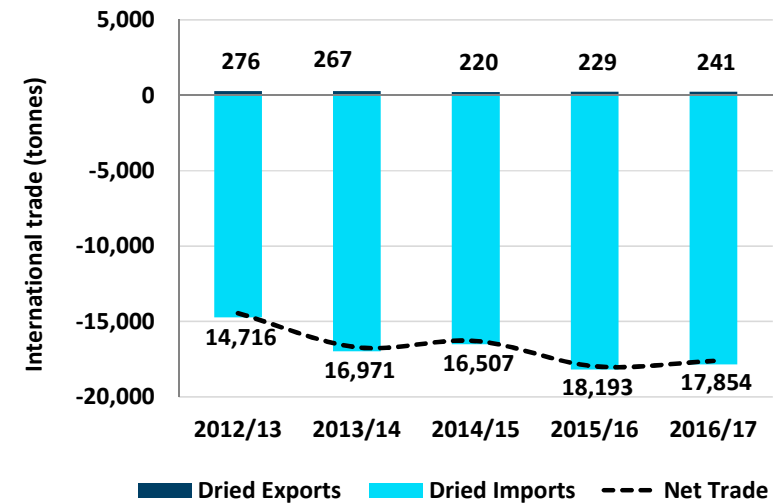
2016/17 Main Dried Tree Fruit Varieties



Sources: GTA; DFA

Processed Dried Tree Fruit International Trade

For the year ending June 2017, Australia imported **17,854 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

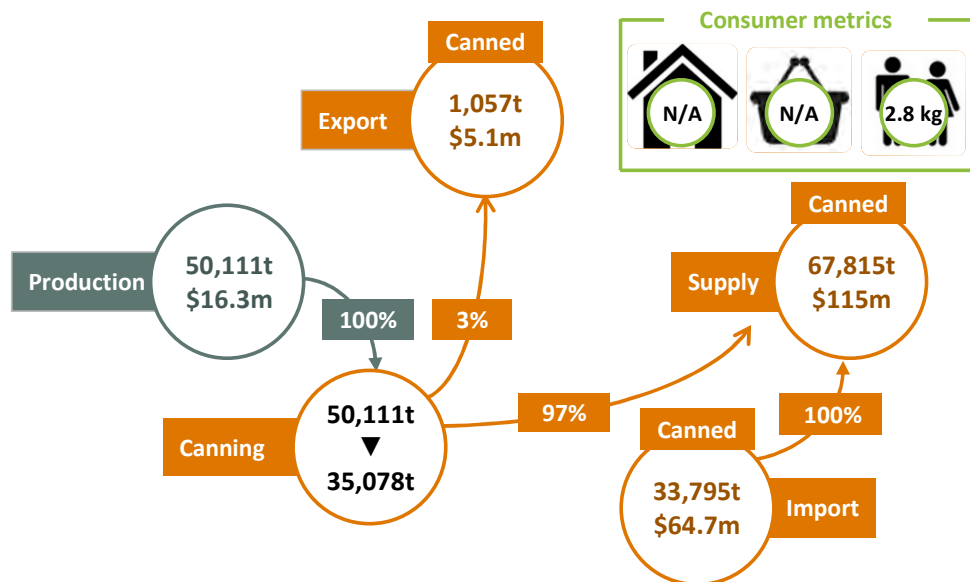
Canned Fruit is a combination of fruits from different categories, predominantly pineapples, peaches and pears. The majority of the fruit grown for this category are found around Australia typically within close proximity to canning processors.



For the year ending June 2017:

- **50,111 t** of fresh fruit was produced for canning.
- The value of production of the fresh fruit grown for canning was **\$16.3 m**, while the wholesale value of the canned supply was **\$115.4 m**.
- The supply per capita was **2.8 kg**, based on the volume supplied.

Canned Fruit Supply Chain—Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	Value
Canned Production (t)	30,524	35,030	+15%	35,078	<1%	
Production (\$m)	\$ 12.9	\$ 15.2	+17%	\$ 16.3	+7%	
Production area (Ha)	-	-	-	-	-	
Canned Export Volume (t)	941	1,501	+59%	1,057	-30%	
Canned Export Value (\$m)	\$ 3.8	\$ 6.1	+60%	\$ 5.1	-16%	
Canned Import Volume (t)	33,059	33,601	+2%	33,795	<1%	
Canned Import Value (\$m)	\$ 53.0	\$ 61.3	+16%	\$ 64.7	+5%	
Canned Supply (t)	62,642	67,130	+7%	67,815	+1%	
Supply Wholesale Value (\$m)	\$ 88.4	\$ 95.3	+8%	\$ 115.4	+21%	
Supply per Capita (kg)	2.63	2.78	+6%	2.77	>-1%	

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

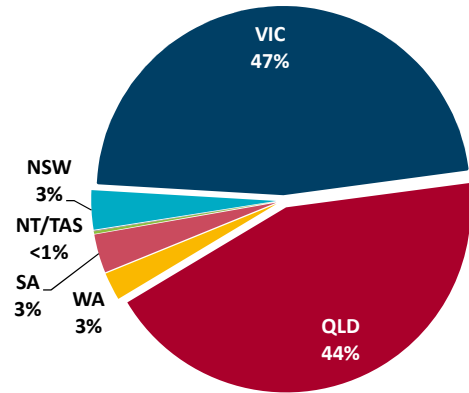
Major Canned Fruit Production Areas

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)

2016/17 Canned Fruit Production by State



Source: (Freshlogic Analysis)

Fresh Fruit Production for Canning—Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,549												
Victoria	21,207												
Queensland	19,665												
Western Australia	1,104												
South Australia	1,525												
Tasmania	95												
Northern Territory	27												
Availability legend		High	Medium	Low	None								

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 2017. These include:

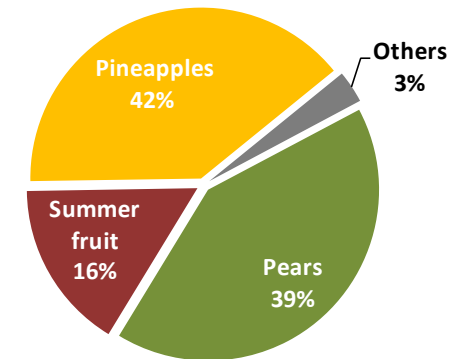
Pineapples account for **42%** of canned fruit processing for the year.

Summerfruit including peaches, apricots, and plums from the **Goulburn** region accounted for **16%** of canned fruit production.

Pears account for **39%** of the fruit grown for canning in Australia.

Other fruit account for **3%** of the remaining canned fruit.

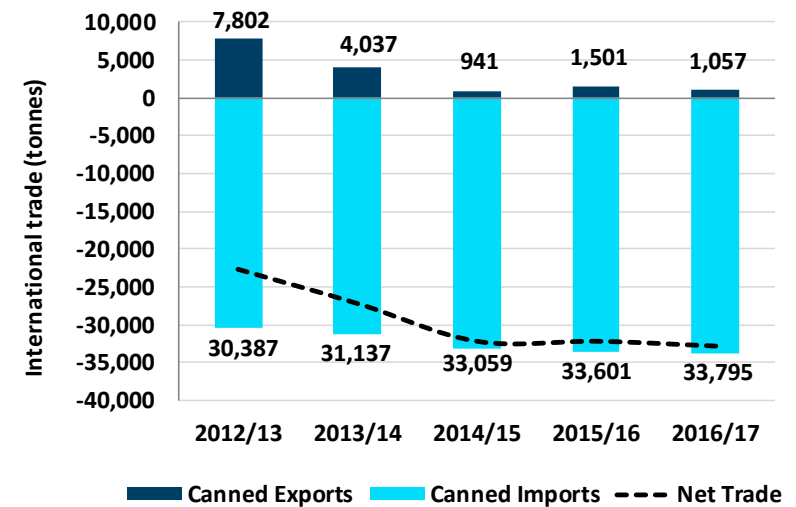
2016/17 Main Canned Fruit Products



Source: (Freshlogic Analysis)

Processed Canned Fruit International Trade

For the year ending June 2017, Australia imported **33,795 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

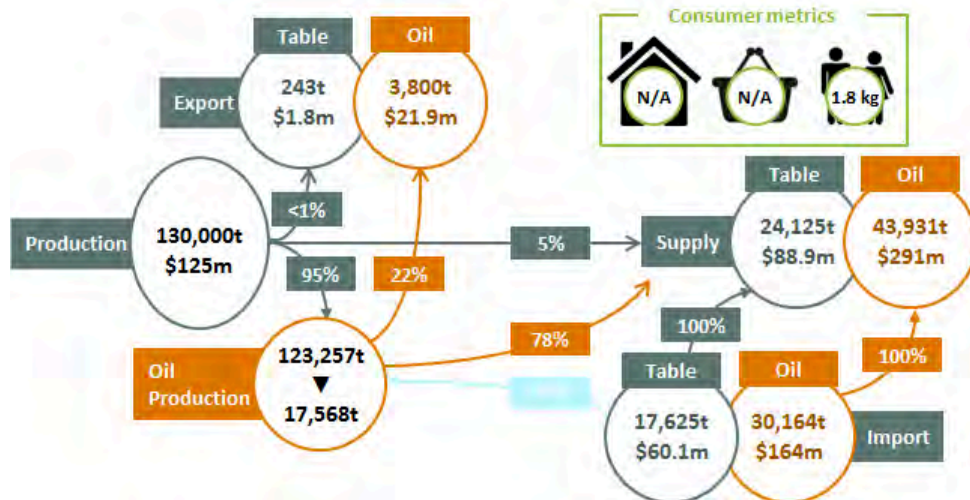
Olives are grown in many states of Australia, with the majority of production being grown in Victoria. Almost all olives grown in Australia are grown for the production of olive oil, with some grown for use as table olives. Both forms are profiled below.



For the year ending June 2017:

- **130,000 t** of fresh olives were produced, **95%** or **123,257 t** of which were extracted for oil, producing **17,568 tonnes** equivalent to **19.2 million litres** of olive oil.
- The value of production of olives was **\$125.1 m**, while the wholesale value of the oil supply was **\$291 m** and the wholesale value of the table supply was **\$88.9 m**.
- The consumption of **olive oil** per capita was **1.8 kg**, based on the volume supplied.

Olive Oil/Table Olive Supply Chain—Year Ending June 2017



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



Year Ending June	2015		2016		2017	
	Value	Value	% YoY	Value	% YoY	
Production (t)	107,711	90,323	-16%	130,000	+44%	
Production (\$m)	\$ 122.4	\$ 112.1	-8%	\$ 125.1	+12%	
Production area (Ha)	20,568	20,568	-	20,568	-	
Olive Oil Export Volume (t)	4,410	4,827	+9%	3,800	-21%	
Olive Oil Export Value (\$m)	\$ 23.2	\$ 29.5	+27%	\$ 21.9	-26%	
Olive Oil Import Volume (t)	25,783	24,992	-3%	30,164	+21%	
Olive Oil Import Value (\$m)	\$ 113.3	\$ 140.5	+24%	\$ 163.7	+17%	
Olive Oil Supply (t)	40,815	36,423	-11%	43,931	+21%	
Olive Oil Wholesale Value (\$m)	\$ 247.3	\$ 255.7	+3%	\$ 290.7	+14%	
Oil Consumption per Capita (kg)	1.72	1.51	-12%	1.79	+19%	

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

**Note: Production volume and value has been modified from those published in the previous edition of the handbook (2015/16 edition).*

Major Olive Production Areas

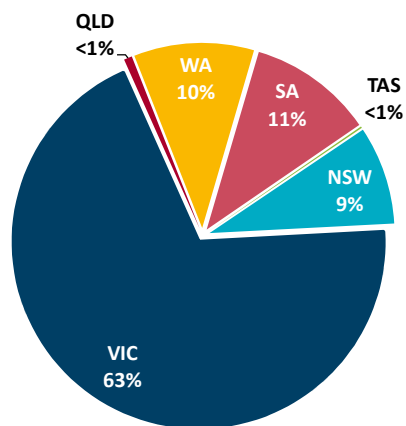
The majority of production of olives in Australia occurs in Victoria, with the largest production area being in the **Murray Valley region** north west of Victoria. Other areas of production include Riverina region in NSW and Boort in Victoria.



Source: AOA



2016/17 Olives Production by State



Source: AOA

Fresh Olive Production — Seasonality by State

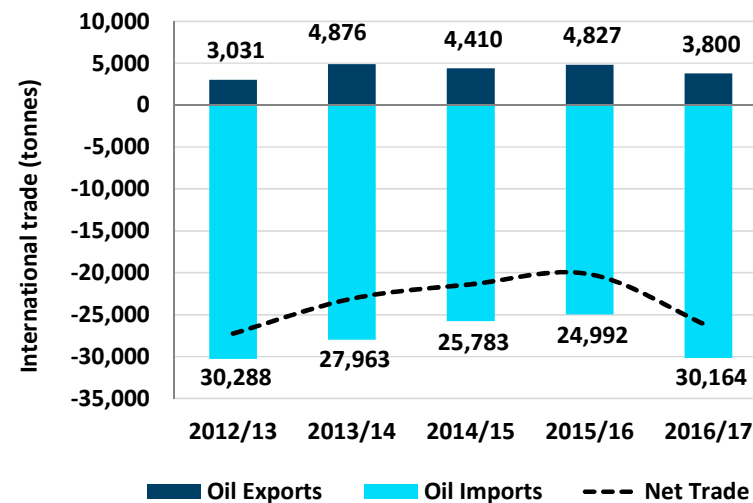
State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	11,180												
Victoria	89,895	High											
Queensland	936												
Western Australia	13,650												
South Australia	14,170												
Tasmania	169	High	High										
Availability legend		High		Medium		Low							None

Source: AOA



Olive Oil International Trade

For the year ending June 2017, Australia imported **30,164 tonnes** of olive oil (**this number does not include table olives**). The exports and imports of canned over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

