



# Australian Horticulture Statistics Handbook

## Nuts

2016/17

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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:

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

- Farm gate production quantity has been informed through a number of sources, including Hort Innovation funded data projects, horticultural government levy data where available, and refined through consultation with informed industry bodies. The corresponding value of production is calculated from wholesale pricing information, before removing known logistical, marketing and wholesale costs to reflect product value at the farm gate.
- Export and import trade volume and value is based on Australian Customs data as reported in IHS Global Trade Atlas data.
- Processing data has been obtained through consultation with industry processors<sup>1</sup>.

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

<sup>1</sup>Note 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](http://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](mailto: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 <sup>2</sup>   | Metres squared (a measure of area)                        |
| m m <sup>2</sup> | 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.

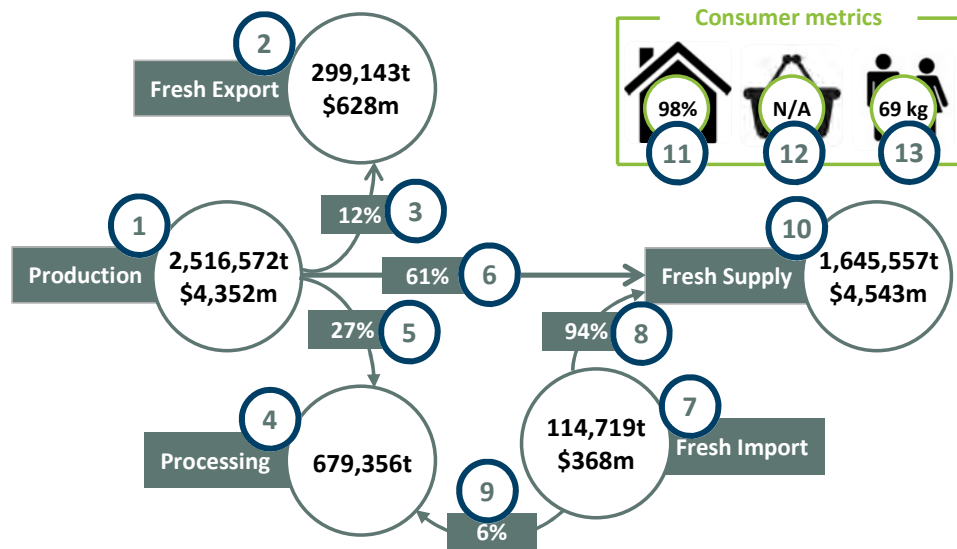
**Kernel (Nut categories)** —A measure of volume that only includes the edible kernel.

**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:

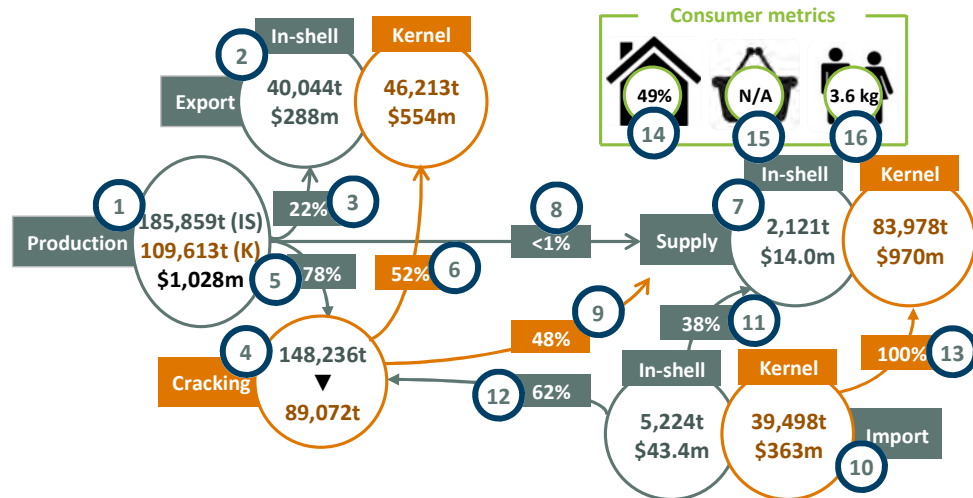


- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2017. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
- 2.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



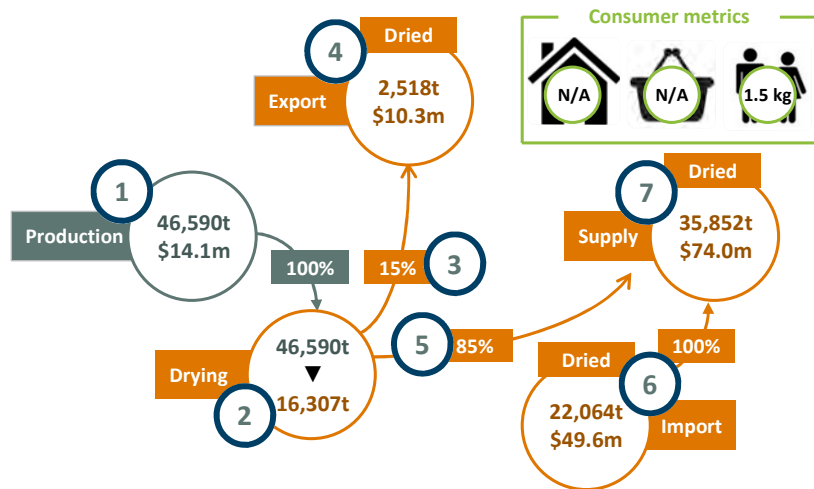
- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2017. This profiles the **Production** (volume in tonnes), in both *In-Shell* (written in *green* and denoted by *IS*) and the *Kernel* equivalent of this volume after cracking (written in *orange* and 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/Number of Trees/Vines.** A measure of the growing area of the category (in hectares), or the number of trees/vines used to grow the category over the year. This data has been gathered from the Australian Bureau of Statistics Agricultural Statistics information, the largest survey of growers available. *This information has been included for indicative purposes only, and should be viewed as such.*
- Export Volume and Value.** The volume in tonnes and the value in million dollars of the category exported in a fresh form over the year.
- Import Volume and Value.** The volume in tonnes and the value in million dollars of the category imported in a fresh form over the year.
- Supply.** The volume in tonnes of the category made available to the local Australian fresh market, including locally grown product and imported fresh product.
- Wholesale Value.** The value in million dollars of the supply at a wholesale market level.
- Supply per capita.** The volume available to the Australian public. Calculated as the volume supply divided by the population for the year.



### Overview

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

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

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

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

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

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

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

**Consumer information** including percent of households purchasing a category, and average purchase quantities, has been sourced from Freshlogic's *Mealpulse™* consumer survey and *DocketData™* systems. Supply per capita has been calculated as total volume of fresh supply divided by population for the year ending June 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>   |
|----------------------------|---|--|
| <b>ABS</b>                 | <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.<br><i>Australian Demographic Statistics cat. no. 3101.0</i> June 2017 edition.<br><i>2016 Census of Population and Housing</i> |
| <b>AC</b>                  | Ausmarket Consultants   | Wholesale pricing information from the Adelaide, Brisbane, Melbourne and Sydney wholesale markets.   |
| <b>CFVIWA</b>              | Chamber of Fruit and Vegetable Industries of Western Australia    | Wholesale pricing information from the Perth wholesale market.   |
| <b>Freshlogic Analysis</b> | 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.  |
| <b>GTA</b>                 | IHS —Global Trade Atlas®  | <a href="http://www.gtis.com/gta">www.gtis.com/gta</a>   |

| <u>Abbreviation</u> | <u>Data Source</u>               | <u>Further information</u>  |
|---------------------|----------------------------------|---|
| <b>IRB</b>          | Industry Representative Bodies   | Consultation with informed bodies to ensure information reconciles.<br><br>The abbreviation 'IRB' is listed where multiple industry bodies were contacted for a category/group.<br><br>Where one industry body was contacted for an individual category, the relevant name is listed. |
| <b>MP &amp; DD</b>  | 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.

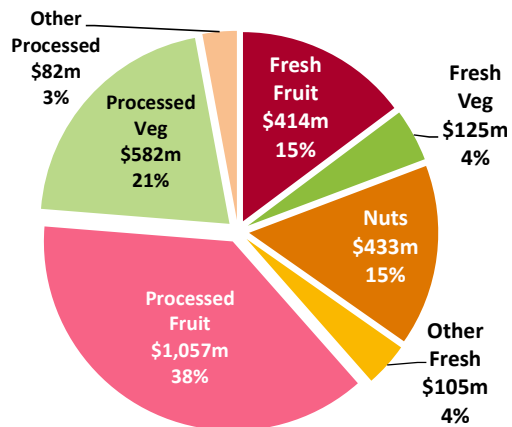
| <u>Project Code</u>                       | <u>Project Title</u>  |
|---|---|
| <b>AL16002</b><br><b>(Almonds)</b>        | <i>Australian Almond Industry Statistics</i>  |
| <b>AP16002</b><br><b>(Apples)</b>         | <i>Apple and Pear Crop Estimates</i>  |
| <b>AV16006</b><br><b>(Avocados)</b>       | <i>Avocado Industry Data Capture and Analysis</i>   |
| <b>CH15000</b><br><b>(Chestnuts)</b>      | <i>Communication and adoption program for the Australian Chestnut Industry</i>                                    |
| <b>CT15012</b><br><b>(Citrus)</b>         | <i>Australian Citrus Industry Innovation and Market Development Program</i>                                       |
| <b>CU15002</b><br><b>(Custard Apples)</b> | <i>Custard Apple Dispatch System 2</i>  |
| <b>MC15005</b><br><b>(Macadamias)</b>     | <i>Benchmarking the Macadamia Industry 2015-2018</i>  |
| <b>MC15009</b><br><b>(Macadamias)</b>     | <i>Macadamia Crop Forecasting 2015 - 2018</i>   |
| <b>MG13017</b><br><b>(Mangoes)</b>        | <i>Capacity Building, Information, Technology and Extension for the Australian mango industry (Crop Forecast)</i> |
| <b>NY16004</b><br><b>(Nursery)</b>        | <i>Nursery industry statistics and research 2016/17</i>   |
| <b>PI13006</b><br><b>(Pineapples)</b>     | <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>  |
|---------------------------------------|---|
| <b>TM13007</b><br><b>(Tomatoes)</b>   | <i>Australian Processing Tomato Industry Capacity Building Program</i>        |
| <b>TU16001</b><br><b>(Turf)</b>       | <i>Turf industry statistics and research 2016/17</i>                          |
| <b>VG15077</b><br><b>(Vegetables)</b> | <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.

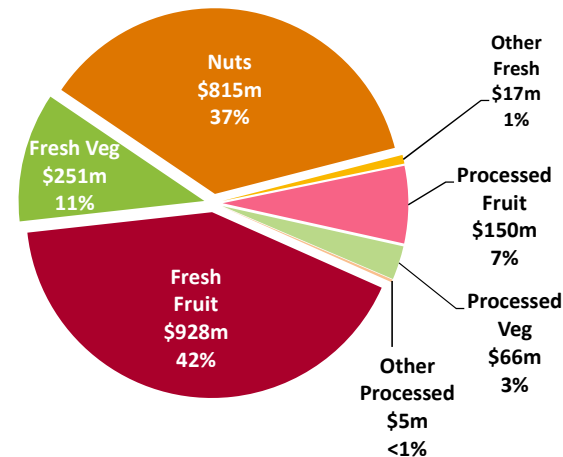


Sources: GTA; (Freshlogic Analysis)

|                               |                 |                                       |                   |
|-------------------------------|-----------------|---------------------------------------|-------------------|
| <b>Fresh Fruit</b> .....      | <b>\$413.7m</b> | <b>Other Fresh Horticulture</b> ..... | <b>\$105.1m</b>   |
| Avocados .....                | \$116.9m        | Cut Flowers .....                     | \$66.8m           |
| Grapes .....                  | \$63.3m         | Bulbs .....                           | \$23.3m           |
| Kiwifruit.....                | \$50.9m         | Live Plants.....                      | \$15.0m           |
| <b>Fresh Vegetables</b> ..... | <b>\$125.2m</b> | <b>Processed Fruit</b> .....          | <b>\$1,056.7m</b> |
| Garlic.....                   | \$46.0m         | Olives and Olive Oil.....             | \$223.8m          |
| Asparagus.....                | \$25.2m         | Orange Juice .....                    | \$58.5m           |
| Mushrooms.....                | \$10.7m         | Dried Tree Fruits.....                | \$50.0m           |
| <b>Nuts</b> .....             | <b>\$433.3m</b> | <b>Processed Vegetables</b> .....     | <b>\$582.2m</b>   |
| 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.*

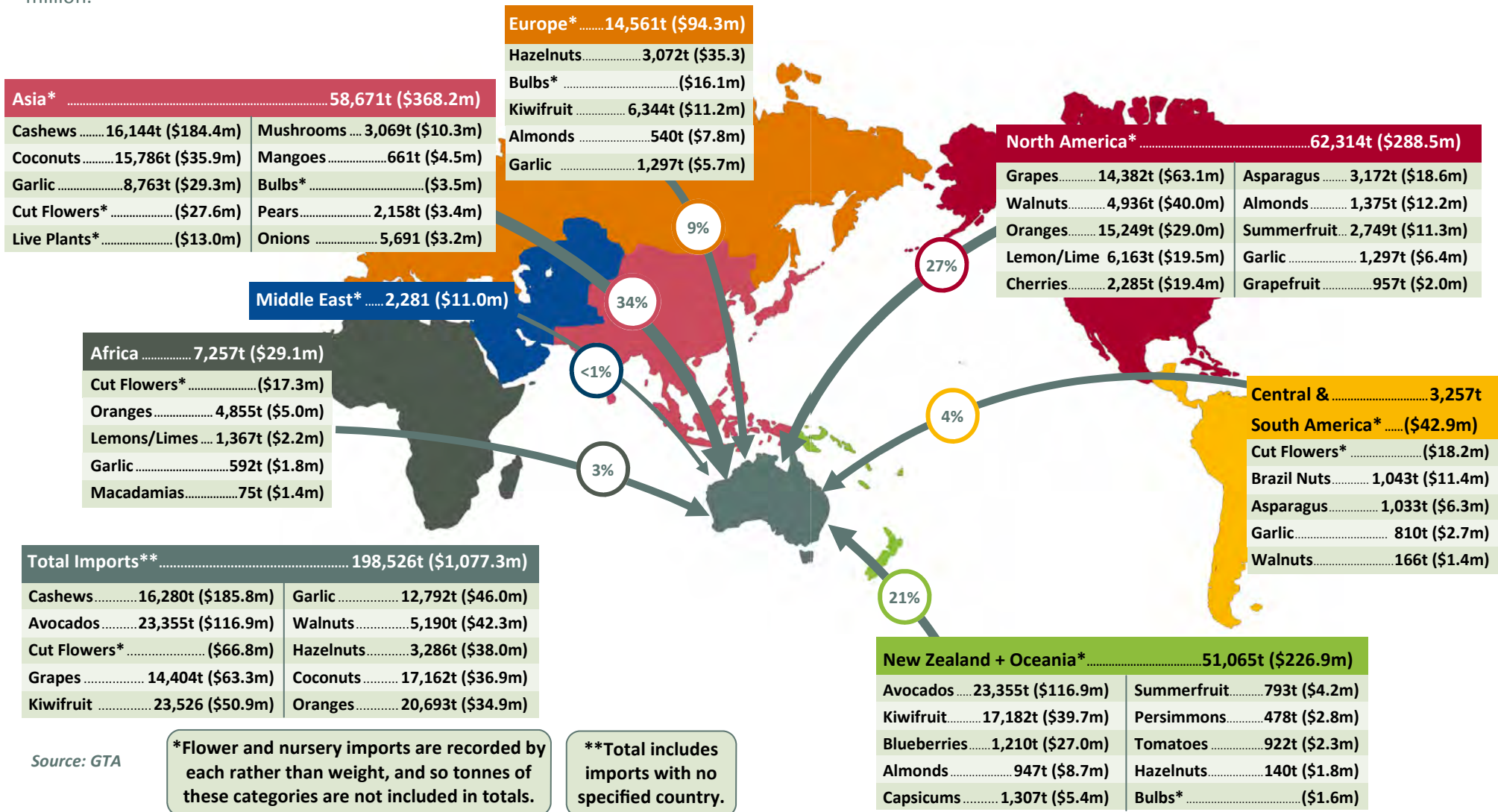


Sources: GTA; (Freshlogic Analysis)

|                               |                 |                                       |                 |
|-------------------------------|-----------------|---------------------------------------|-----------------|
| <b>Fresh Fruit</b> .....      | <b>\$927.7m</b> | <b>Other Fresh Horticulture</b> ..... | <b>\$16.9m</b>  |
| Table Grapes .....            | \$372.6m        | Cut Flowers.....                      | \$9.7m          |
| Oranges.....                  | \$223.7m        | Live Plants.....                      | \$6.9m          |
| Mandarins.....                | \$78.7m         | Bulbs.....                            | \$0.2m          |
| <b>Fresh Vegetables</b> ..... | <b>\$250.6m</b> | <b>Processed Fruit</b> .....          | <b>\$149.7m</b> |
| 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          |
| <b>Nuts</b> .....             | <b>\$815.3m</b> | <b>Processed Vegetables</b> .....     | <b>\$65.6m</b>  |
| 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.

Source: GTA

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

\*\*Total includes imports with no specified country.

## 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.

|   |                                |
|---|--------------------------------|
| <b>Asia*</b> .....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) |

|   |                                 |
|---|---------------------------------|
| <b>Middle East</b> .....104,076t (\$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)   |

|                                     |
|-------------------------------------|
| <b>Africa</b> .....2,123t (\$10.3m) |
| Almonds.....907t (\$6.9m)           |
| Seed Potato.....1,101t (\$1.3m)     |

|   |                                   |
|---|-----------------------------------|
| <b>Total Exports**</b> .....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.

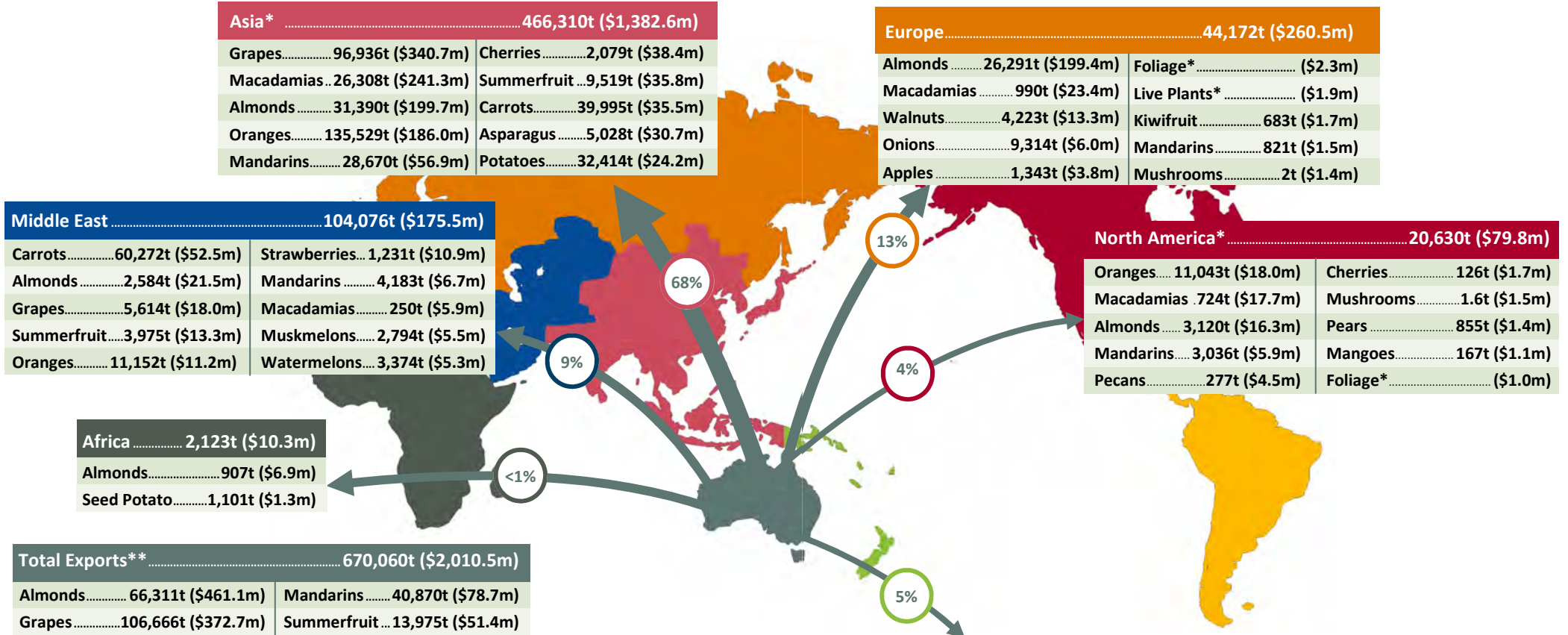
\*\*Total includes exports with no specified country.

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.

|                                       |                             |
|---------------------------------------|-----------------------------|
| <b>Europe</b> .....44,172t (\$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)   |

|  |                             |
|--|-----------------------------|
| <b>North America*</b> .....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)       |

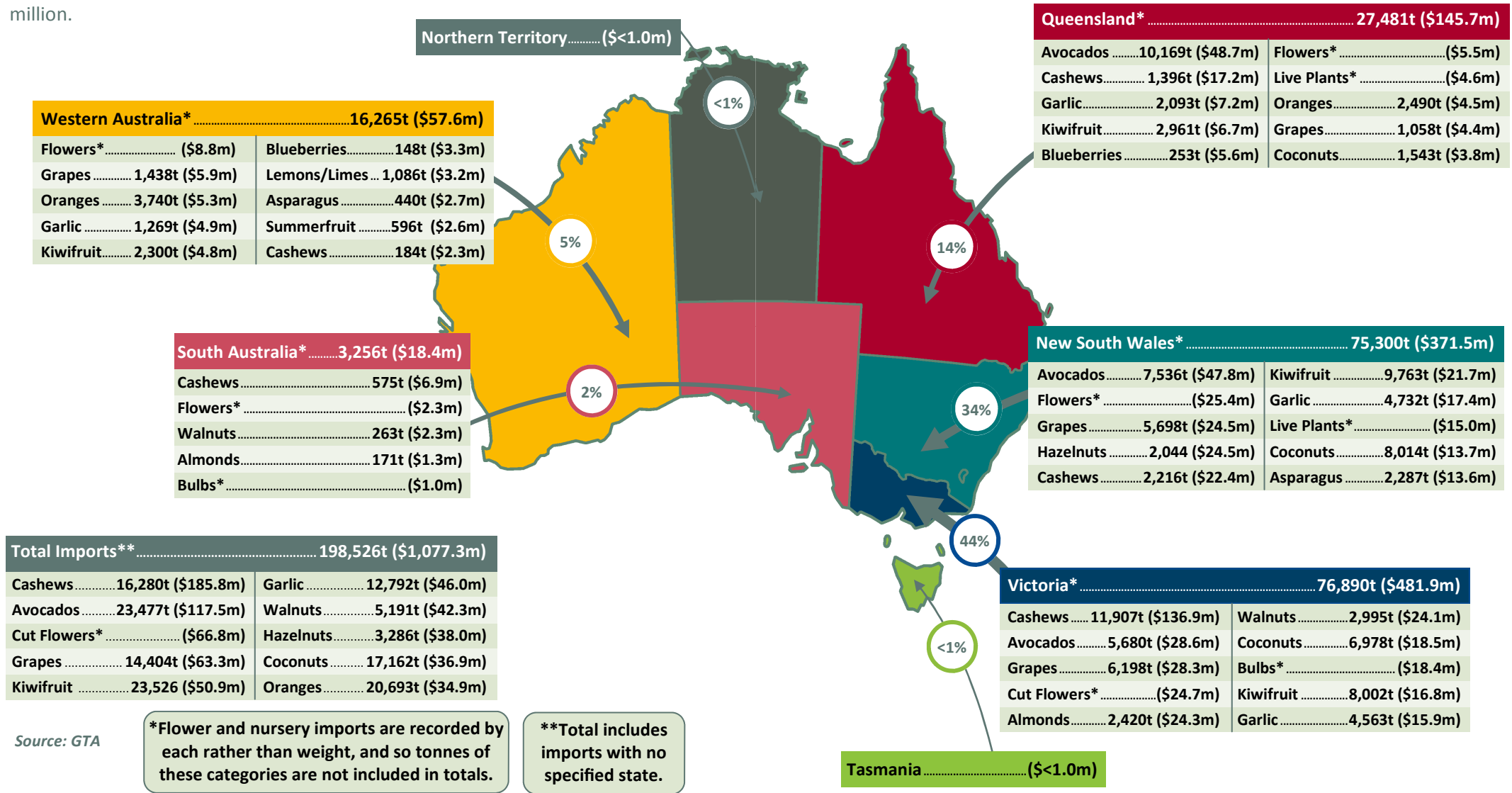
|  |                                |
|--|--------------------------------|
| <b>New Zealand + Oceania</b> .....37,440t (\$106.4m) |                                |
| Almonds.....1,893t (\$16.3m)                         | Muskmelons...3,369t (\$5.7m)   |
| Grapes.....3,843t (\$13.1m)                          | 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.

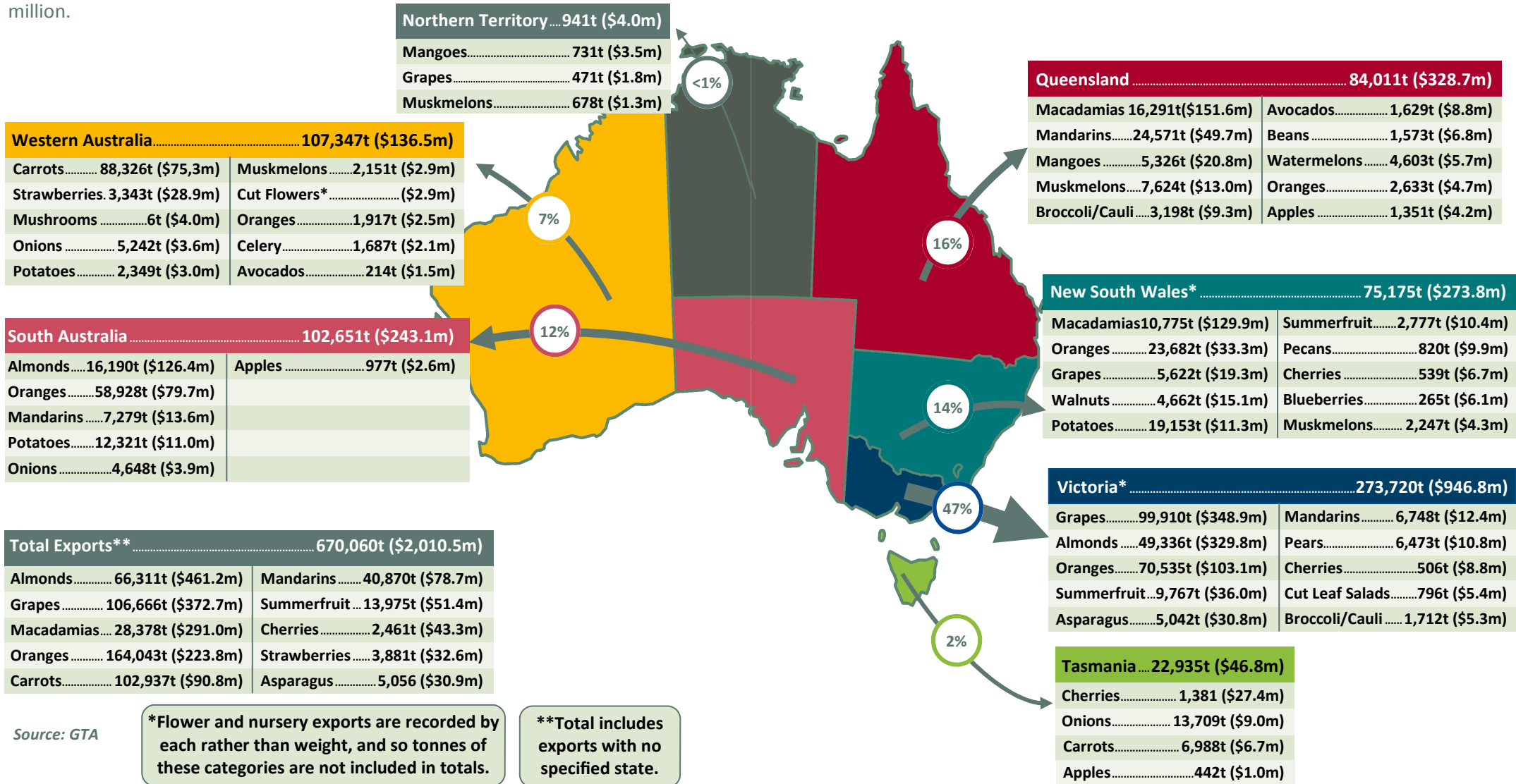
The relative share of the **value** of imports to each of the states is also profiled in the circle associated with each region. Note that the total value and volume for all states (located at the bottom left of the page) includes import information with no specified state, and therefore may exceed the 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            |
| <b>All Fruit</b>           | <b>2,649,093</b> | 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            | <b>All Vegetables</b>      | <b>3,502,673</b> |
| 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         | <b>All Nuts</b>           | <b>186,211</b> |
| 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         | <b>Other Horticulture</b> | <b>N/A</b>     |
| 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           |
| <b>All Fruit</b>           | <b>\$4,859.5</b> | 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           | <b>All Vegetables</b>      | <b>\$4,291.6</b> |
| 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          | <b>All Nuts</b>           | <b>\$922.6</b>   |
| 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          | <b>Other Horticulture</b> | <b>\$2,836.2</b> |
| 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) |
|----------------------------|-------------------------|
| All Horticultural Products | 670,060                 |
| <b>All Fruit</b>           | <b>378,524</b>          |
| Apples                     | 4,950                   |
| Avocados                   | 2,315                   |
| Bananas                    |                         |
| Berries - Combined         | 4,244                   |
| Blueberries                | 356                     |
| Rubus Berries              | 7                       |
| Strawberries               | 3,881                   |
| Cherries                   | 2,462                   |
| Citrus - Combined          | 208,041                 |
| Grapefruit                 | 1,197                   |
| Lemons/Limes               | 1,724                   |
| Mandarins                  | 40,871                  |
| Oranges                    | 164,044                 |
| Custard Apples             | 88                      |
| Kiwifruit                  | 944                     |
| Lychees                    | 411                     |
| Mangoes                    | 7,120                   |
| Melons - Combined          | 19,327                  |
| Muskmelons                 | 13,211                  |
| Watermelons                | 6,116                   |
| Nashi                      |                         |

| Year Ending June 2017      | Fresh Export Volume (t) |
|----------------------------|-------------------------|
| Passionfruit               |                         |
| Papaya/Pawpaw              | 57                      |
| Persimmons                 | 143                     |
| Pears                      | 7,131                   |
| Pineapples                 |                         |
| Summerfruit - Combined     | 13,975                  |
| Apricots                   | 431                     |
| Nectarines/Peaches         | 9,023                   |
| Plums                      | 4,521                   |
| Table Grapes               | 106,666                 |
| Processing Fruit Combined* |                         |
| Dried Grapes*              |                         |
| Prunes*                    |                         |
| Other Dried Tree Fruit*    |                         |
| Canned Fruit*              |                         |
| Olives*                    |                         |
| Other Fruit                | 649                     |
| <b>All Vegetables</b>      | <b>192,412</b>          |
| Artichokes                 | 7                       |
| Asparagus                  | 5,056                   |
| Beans                      | 1,594                   |
| Beetroot                   | 367                     |
| Broccoli/Baby Broccoli     | 5,010                   |

Sources: GTA; IRB; (Freshlogic Analysis)

| Year Ending June 2017       | Fresh Export Volume (t) |
|-----------------------------|-------------------------|
| Brussels Sprouts            | 248                     |
| Cabbage                     | 2,624                   |
| Capsicums                   | 346                     |
| Carrots                     | 102,937                 |
| Cauliflower                 | 683                     |
| Celery                      | 3,872                   |
| Chillies                    | 3                       |
| Cucumbers                   | 105                     |
| Eggplant                    | 10                      |
| Eng.Spinach/Silverbeet/Kale | 166                     |
| Fresh Herbs - Combined      |                         |
| Fennel                      |                         |
| Parsley and Other Herbs     |                         |
| Garlic                      | 94                      |
| Ginger                      | 17                      |
| Leafy Asian Vegetables      |                         |
| Leafy Salad Vegetables      | 1,313                   |
| Leeks                       | 176                     |
| Head Lettuce                | 194                     |
| Mushrooms                   | 62                      |
| Onions                      | 24,798                  |
| Parsnips                    |                         |
| Peas                        | 18                      |

| Year Ending June 2017     | Fresh Export Volume (t) |
|---------------------------|-------------------------|
| Potatoes                  | 34,782                  |
| Pumpkins                  | 2,086                   |
| Sweet Corn                |                         |
| Sweetpotatoes             | 866                     |
| Tomatoes                  | 530                     |
| Zucchini                  |                         |
| Other Vegetables          | 4,447                   |
| <b>All Nuts*</b>          | <b>99,124</b>           |
| Almonds*                  | 66,311                  |
| Chestnuts*                |                         |
| Hazelnuts*                | 23                      |
| Macadamias*               | 23,903                  |
| Pecans*                   | 911                     |
| Pistachios*               | 127                     |
| Walnuts*                  | 4,750                   |
| Other Nuts*               | 3,099                   |
| <b>Other Horticulture</b> | <b>N/A</b>              |
| Cut Flowers               | N/A                     |
| Nursery                   | N/A                     |
| Turf                      | N/A                     |

\*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                |
| <b>All Fruit</b>           | <b>\$927.7</b>           |
| 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                    |
| <b>All Vegetables</b>      | <b>\$250.6</b>           |
| 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                   |
| <b>All Nuts*</b>          | <b>\$815.3</b>           |
| Almonds*                  | \$461.2                  |
| Chestnuts*                |                          |
| Hazelnuts*                | \$0.3                    |
| Macadamias*               | \$291.0                  |
| Pecans*                   | \$11.0                   |
| Pistachios*               | \$1.8                    |
| Walnuts*                  | \$15.9                   |
| Other Nuts*               | \$34.1                   |
| <b>Other Horticulture</b> | <b>\$16.9</b>            |
| 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                 |
| <b>All Fruit</b>           | <b>122,951</b>          |
| 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                  |
| <b>All Vegetables</b>      | <b>35,609</b>           |
| 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                   |
| <b>All Nuts*</b>          | <b>39,966</b>           |
| Almonds*                  | 2,902                   |
| Chestnuts*                |                         |
| Hazelnuts*                | 3,286                   |
| Macadamias*               | 81                      |
| Pecans*                   |                         |
| Pistachios*               | 2,340                   |
| Walnuts*                  | 5,191                   |
| Other Nuts*               | 26,166                  |
| <b>Other Horticulture</b> | <b>N/A</b>              |
| 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               |                          |
| <b>All Fruit</b>           | <b>\$413.7</b>           | 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                   | Other Fruit                | \$45.4                   |
| Lychees                    |                          | <b>All Vegetables</b>      | <b>\$125.2</b>           |
| 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                    | Other Vegetables          | \$25.3                   |
| Cucumbers                   | <\$0.1                   | <b>All Nuts*</b>          | <b>\$433.3</b>           |
| 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      |                          | Other Nuts*               | \$291.2                  |
| Leafy Salad Vegetables      | <\$0.1                   | <b>Other Horticulture</b> | <b>\$105.1</b>           |
| 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            |
| <b>All Fruit</b>           | <b>1,746,427</b> | 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            | <b>All Vegetables</b>      | <b>2,125,792</b> |
| 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           | <b>All Nuts</b>           | <b>71,888</b>    |
| 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           | <b>Other Horticulture</b> | <b>N/A</b>       |
| 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                |
| <b>All Fruit</b>           | <b>\$4,929.3</b>      | 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                | <b>All Vegetables</b>      | <b>\$4,572.0</b>      |
| 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               | <b>All Nuts</b>           | <b>\$674.0</b>        |
| 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               | <b>Other Horticulture</b> | <b>\$3,046.1</b>      |
| 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

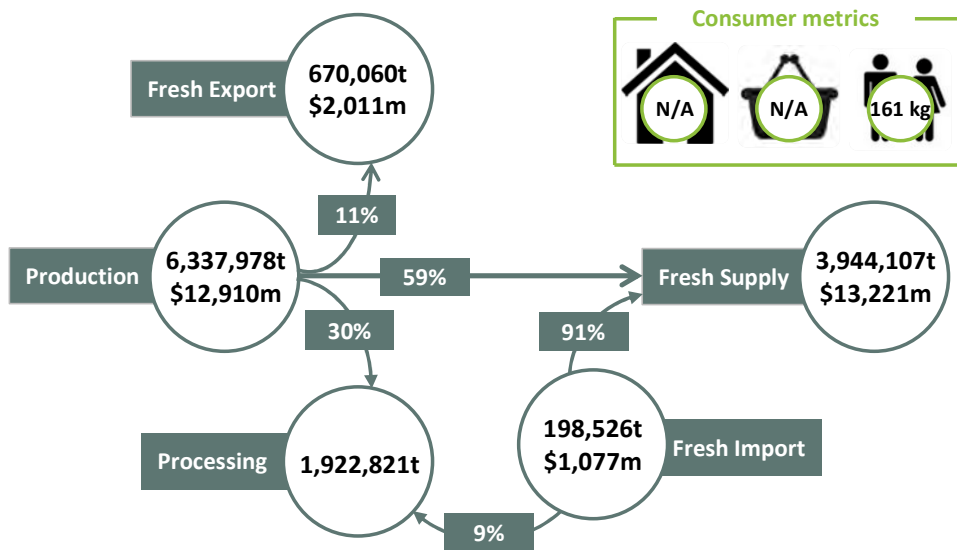
Pages 48-51 profile total horticultural production and trade. It combines information on fruit, vegetables, nuts and other horticultural categories (cut flowers, nursery and turf).

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)

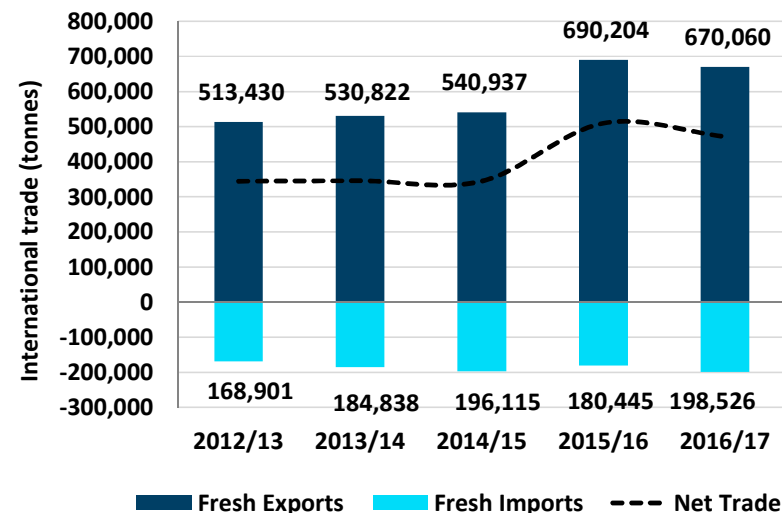


| Year Ending June                   | 2015       | 2016       |       | 2017       |       |
|------------------------------------|------------|------------|-------|------------|-------|
|                                    | Value      | Value      | % YoY | Value      | % YoY |
| Production (t)                     | 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.



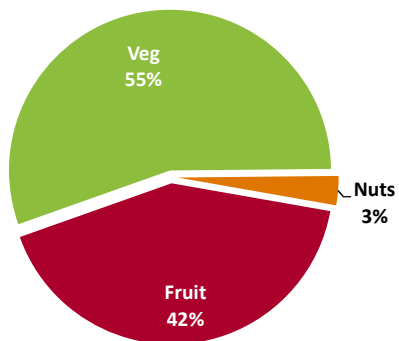
Source: GTA



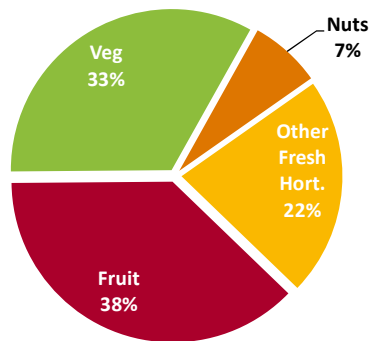
### Production

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



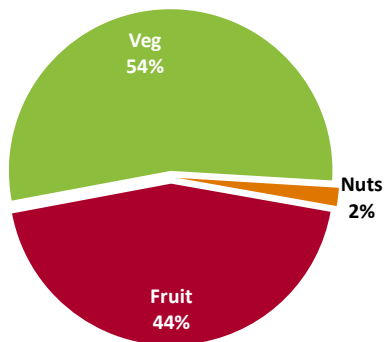
Value of Production - \$12,910.0 m



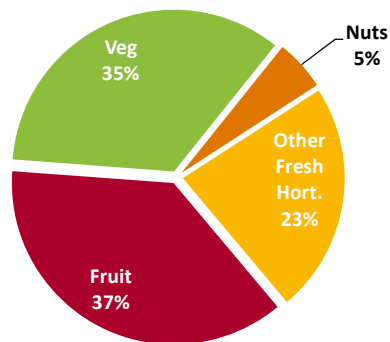
### Fresh supply

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



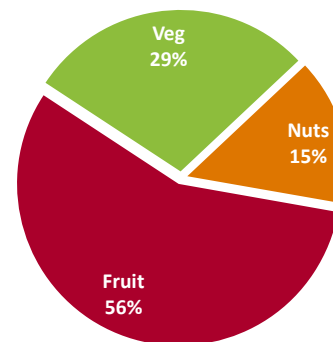
Wholesale Value - \$13,221.4 m



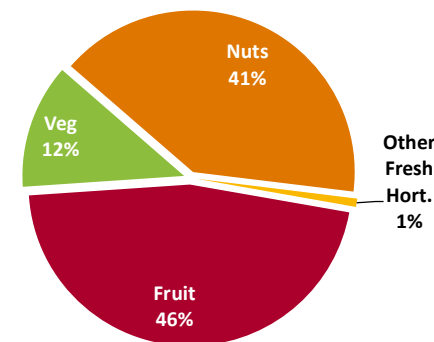
### Fresh exports

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



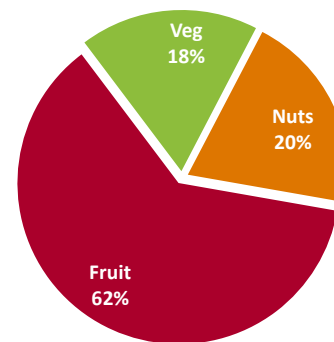
Fresh Export Value - \$2,010.5 m



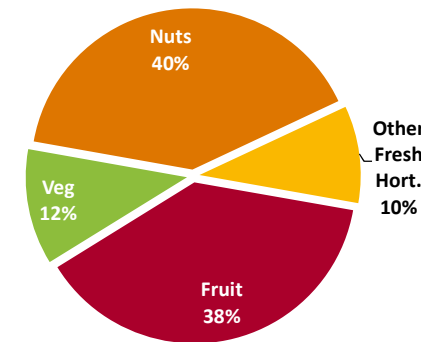
### Fresh imports

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 Nuts — Overview

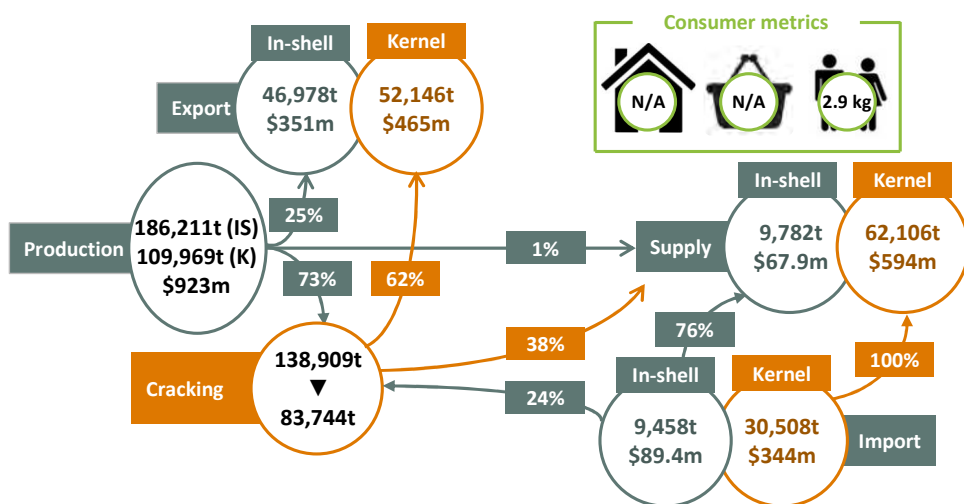
Pages 418-419 profile total nut production and trade. It combines information on all nut categories covered in this handbook\*.

For the year ending June 2017:

- **186,211 t** of nuts (in-shell weight) was produced with a kernel equivalent weight of **109,969 t**.
  - The value of production was worth **\$922.6 million** while the wholesale value of nuts in-shell and kernel supply was **\$674.6 million**.
  - **50%** of Australian households purchased nuts.
  - The supply per capita was **2.93 kg**, based on the volume supplied.
- \*'Other Nuts' are included in the calculation of the category overview totals but have not been profiled separately.*



### All Nuts Supply Chain—Year Ending June 2017



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



| Year Ending June             | 2015       |       | 2016       |       | 2017     |       |
|------------------------------|------------|-------|------------|-------|----------|-------|
|                              | Value      | % YoY | Value      | % YoY | Value    | % YoY |
| Production (ISWE t)          | 185,675    |       | 184,231    | >-1%  | 186,211  | +1%   |
| Production (\$m)             | \$ 1,052.6 |       | \$ 1,215.7 | +15%  | \$ 922.6 | -24%  |
| Production area (Ha)         | 53,007     |       | 57,871     | +9%   | 63,196   | +9%   |
| Export Volume (t)            | 79,971     |       | 86,718     | +8%   | 99,124   | +14%  |
| Export Value (\$m)           | \$ 737.8   |       | \$ 934.1   | +27%  | \$ 815.3 | -13%  |
| Import Volume (t)            | 38,292     |       | 39,807     | +4%   | 39,966   | <-1%  |
| Import Value (\$m)           | \$ 387.9   |       | \$ 436.8   | +13%  | \$ 433.3 | >-1%  |
| Supply (t)                   | 84,002     |       | 77,071     | -8%   | 71,888   | -7%   |
| Supply Wholesale Value (\$m) | \$ 962.3   |       | \$ 929.3   | -3%   | \$ 674.0 | -27%  |
| Supply per Capita (kg)       | 3.53       |       | 3.20       | -9%   | 2.93     | -8%   |

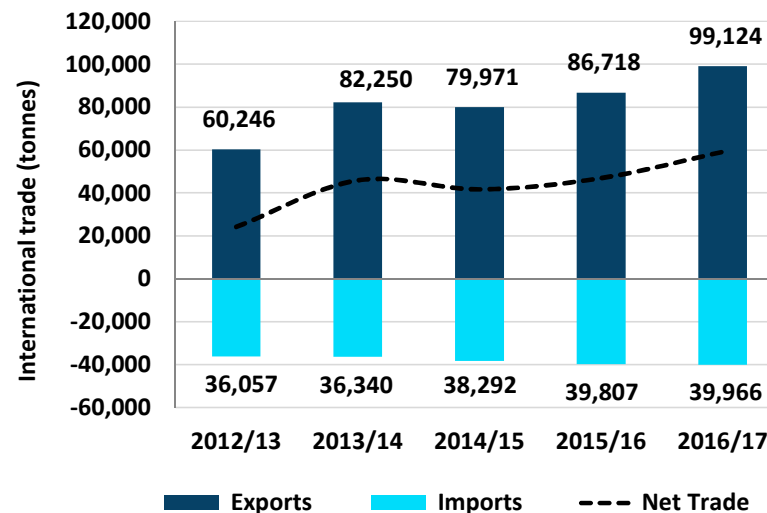
Sources: ABS; AC; CFVIWA; GTA; IRB; MP & DD (Freshlogic Analysis)

*\*Note: Figures has been modified from those published in the previous edition of the handbook (2015/16 edition).*

## All Nuts International Trade

Australia is a net exporter of nuts. For the year ending June 2017, Australia exported **99,124 tonnes** of nuts, as profiled in the graph below, where imports are counted as negative tonnes.

### Net All Nuts International Trade



Source: GTA; IRB



## Almond Overview

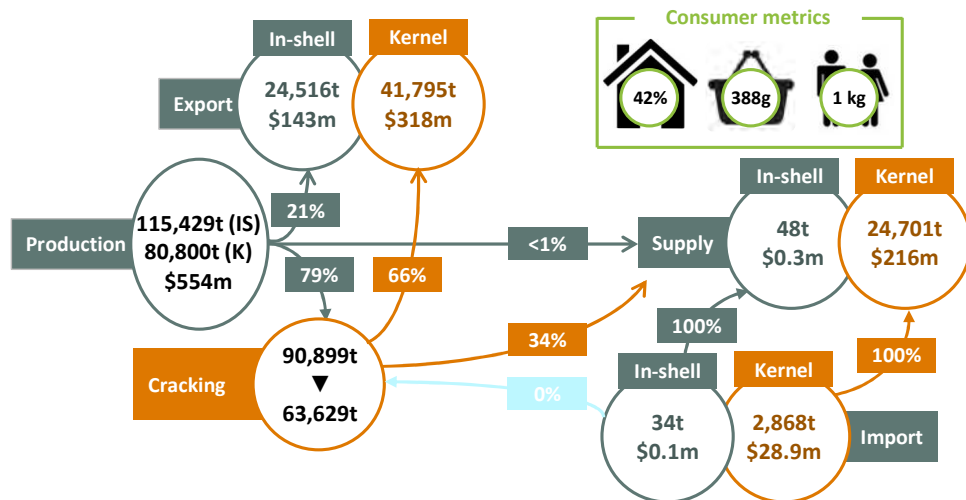
Almonds are grown in the south of Australia, with the majority of production occurring along the Murray River downstream of Swan Hill. The industry has a strong export market focus, with 2.7 tonnes sold overseas for every tonne sold domestically. The majority of almonds are cracked and sold in kernel form.



For the year ending June 2017:

- **115,429 t** of almonds (in-shell weight) was produced, with a kernel equivalent weight of **80,800 t**.
- The value of production was worth **\$554.1 m** while the wholesale value of almonds in-shell and kernel supply was **\$216.6 m**.
- **42%** of Australian households purchased packaged almonds, buying an average of **388 g** per shopping trip.
- The supply per capita of in-shell and kernel almonds was **1 kg**, based on the volume supplied.

## Almond Supply Chain —Year Ending June 2017



Sources: Almond Board of Australia (ABA); ABS; AC; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



| Year Ending June             | 2015     |       | 2016     |       | 2017     |       |
|------------------------------|----------|-------|----------|-------|----------|-------|
|                              | Value    | % YoY | Value    | % YoY | Value    | % YoY |
| Production (KWE t)           | 82,509   |       | 82,333   | >-1%  | 80,800   | -2%   |
| Production (\$m)             | \$ 707.5 |       | \$ 854.1 | +21%  | \$ 553.6 | -35%  |
| Production area (Ha)         | 29,437   |       | 30,981   | +5%   | 35,866   | +16%  |
| Export Volume (KWE t)        | 51,732   |       | 54,840   | +6%   | 58,957   | +8%   |
| Export Value (\$m)           | \$ 521.8 |       | \$ 616.2 | +18%  | \$ 461.2 | -25%  |
| Import Volume (KWE t)        | 2,365    |       | 1,562    | -34%  | 2,892    | +85%  |
| Import Value (\$m)           | \$ 25.3  |       | \$ 20.8  | -18%  | \$ 29.0  | +40%  |
| Supply (KWE t)               | 33,142   |       | 29,055   | -12%  | 24,735   | -15%  |
| Supply Wholesale Value (\$m) | \$ 363.6 |       | \$ 385.1 | +6%   | \$ 216.6 | -44%  |
| Supply per Capita (kg)       | 0.97     |       | 1.00     | +3%   | 1.00     | <1%   |

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

\*Note: all volumes quoted in the table above are in Kernel Weight Equivalent (KWE).

## Major Almond Production Areas

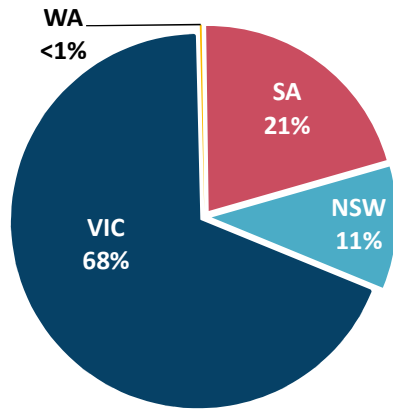
Almonds are produced in the southern states of Australia, predominantly in the Victorian region of **Sunraysia**. Other major production regions include **Adelaide** and the **Riverland region** of South Australia, the **Riverina** in New South Wales and in **Swan Region** in Western Australia.



Source: ABA



## 2016/17 Almond Production by State (Kernel)



Source: ABA

## Almond Harvest Season by State (Kernel)

| State             | 16/17 Tonnes | Jul     | Aug | Sep            | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May  | Jun |
|-------------------|--------------|---------|-----|----------------|-----|-----|-----|-----|-----|-----|-----|------|-----|
| New South Wales   | 8,602        |         |     |                |     |     |     |     |     |     |     |      |     |
| Victoria          | 55,279       |         |     |                |     |     |     |     |     |     |     |      |     |
| South Australia   | 16,779       |         |     |                |     |     |     |     |     |     |     |      |     |
| Western Australia | 140          |         |     |                |     |     |     |     |     |     |     |      |     |
| Harvest legend    |              | Harvest |     | End of Harvest |     |     |     |     |     |     |     | None |     |

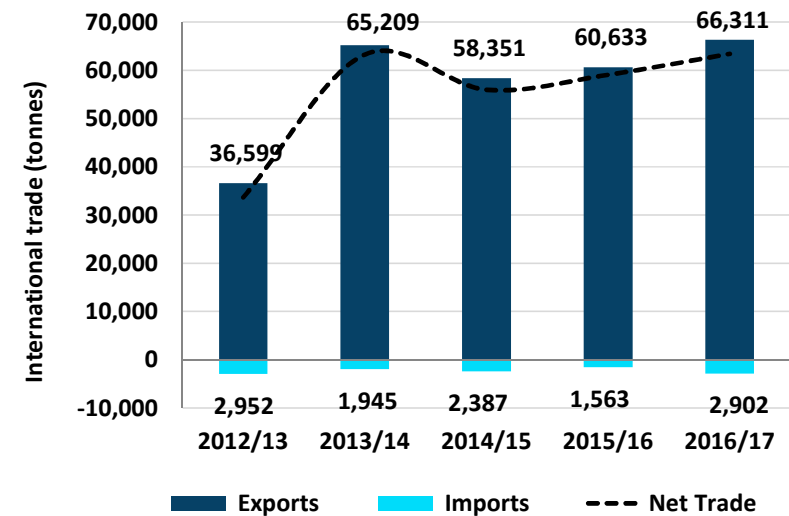
Source: ABA

## Almond International Trade (In-shell and Kernel)

Exports of almonds have been increasing in recent years as local production has increased. Exports are a mix of both in-shell and kernel, while the majority of imports are in kernel form. For the year ending June 2017, Australia exported **24,516 tonnes** of in-shell almonds (**37%** of combined exports) and **41,795 tonnes** of kernel almonds (**63%** of combined exports). This equates to **66,311 tonnes** exported in 2016/17, or **58,957 tonnes in kernel equivalent weight (KWE)**. Australia imported **34 tonnes** of in-shell almonds (**<1%** of almond imports) and **2,868 tonnes** of kernel almonds (**99%** of imports). 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, and all information is provided in total volume, rather than KWE.



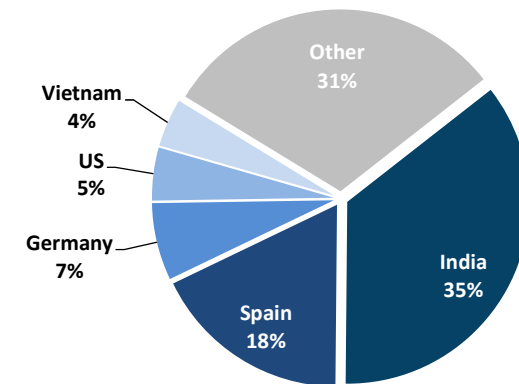
## Net Almond International Trade



Source: GTA

For the year ending June 2017, **35%** of exported almonds (*both in-shell and kernel*) were sent to India, as profiled in the chart below.

## 2016/17 Almond Export by Country



Source: GTA



## Almond Imports by State and Exports by State (Both In-Shell and Kernel)

| 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                              | 1,688           | 1,183           | 2,421           | Victoria                                       | 44,435        | 45,707        | 49,336        |
| New South Wales                       | 363             | 137             | 296             | South Australia                                | 11,681        | 13,136        | 16,190        |
| South Australia                       | 281             | 243             | 172             | Queensland                                     | 55            | 11            | 40            |
| Queensland                            | -               | -               | 14              | New South Wales                                | 16            | 151           | 24            |
| Western Australia                     | 55              | < 0.5           | < 0.5           | Western Australia                              | -             | < 0.5         | < 0.5         |
| <b>Other</b>                          | <b>&lt; 0.5</b> | <b>&lt; 0.5</b> | <b>&lt; 0.5</b> | <b>Other</b>                                   | <b>2,164</b>  | <b>1,627</b>  | <b>721</b>    |
| <b>TOTAL</b>                          | <b>2,387</b>    | <b>1,563</b>    | <b>2,902</b>    | <b>TOTAL</b>                                   | <b>58,351</b> | <b>60,633</b> | <b>66,311</b> |

## Almond Imports and Exports by Country (Both In-Shell and Kernel)

| Imports by country (Tonnes) |              |              |              | Exports by country (Tonnes) |               |               |               |
|-----------------------------|--------------|--------------|--------------|-----------------------------|---------------|---------------|---------------|
| Year Ending June            | 2015         | 2016         | 2017         | Year Ending June            | 2015          | 2016          | 2017          |
| US                          | 2,167        | 907          | 1,375        | India                       | 21,508        | 16,520        | 23,673        |
| Spain                       | 65           | 264          | 480          | Spain                       | 8,363         | 9,276         | 11,759        |
| Italy                       | 2            | 12           | 60           | Germany                     | 3,529         | 4,732         | 4,545         |
| Vietnam                     | -            | -            | 24           | US                          | 5,247         | 5,092         | 3,118         |
| Pakistan                    | 2            | 12           | 11           | Vietnam                     | 51            | 2,524         | 2,844         |
| <b>Other</b>                | <b>152</b>   | <b>368</b>   | <b>952</b>   | <b>Other</b>                | <b>19,653</b> | <b>22,489</b> | <b>20,372</b> |
| <b>TOTAL</b>                | <b>2,387</b> | <b>1,563</b> | <b>2,902</b> | <b>TOTAL</b>                | <b>58,351</b> | <b>60,633</b> | <b>66,311</b> |

Source: GTA





## Chestnut Overview

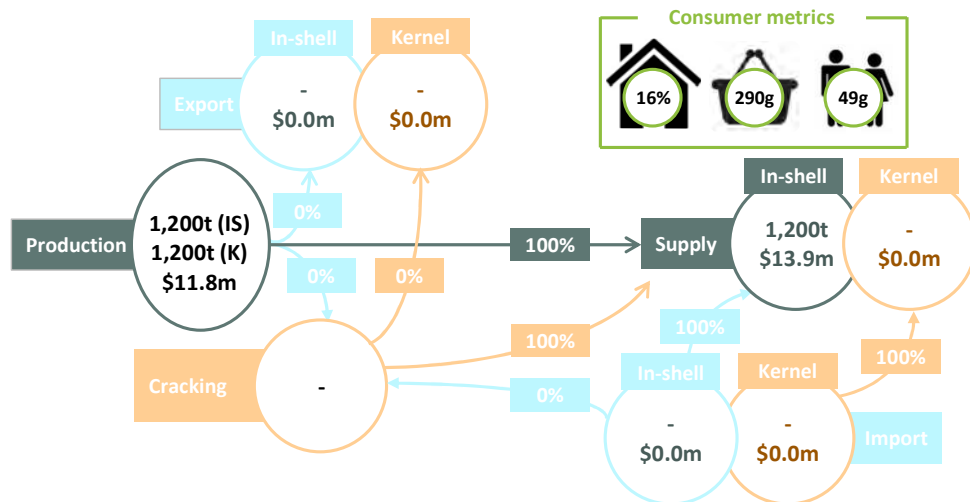
Chestnuts are grown in the south of Australia, with the majority of production occurring in Victoria. Chestnut production has a strong domestic market focus. Chestnuts are all sold in a fresh in-shell form.



For the year ending June 2017:

- **1,200 t** was produced.
- The value of production was **\$11.8 m** while the wholesale value of the supply was **\$13.9 m**.
- **16%** of Australian households purchased chestnuts, buying an average of **290 g** per shopping trip.
- The supply per capita was **49 g**, based on the volume supplied.

## Chestnut Supply Chain — Year ending June 2017



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



| Year Ending June             | 2015    |         | 2016  |         | 2017  |  |
|------------------------------|---------|---------|-------|---------|-------|--|
|                              | Value   | Value   | % YoY | Value   | % YoY |  |
| Production (KWE t)           | 1,071   | 893     | -17%  | 1,200   | +34%  |  |
| Production (\$m)             | \$ 10.5 | \$ 8.8  | -16%  | \$ 11.8 | +34%  |  |
| Production area (Ha)         | 1,400   | 1,440   | +3%   | 1,480   | +3%   |  |
| Export Volume (KWE t)        | -       | -       | -     | -       | -     |  |
| Export Value (\$m)           | \$ -    | \$ -    | -     | \$ -    | -     |  |
| Import Volume (KWE t)        | -       | -       | -     | -       | -     |  |
| Import Value (\$m)           | \$ -    | \$ -    | -     | \$ -    | -     |  |
| Supply (KWE t)               | 1,071   | 893     | -17%  | 1,200   | +34%  |  |
| Supply Wholesale Value (\$m) | \$ 12.3 | \$ 10.3 | -16%  | \$ 13.9 | +34%  |  |
| Supply per Capita (kg)       | 0.05    | 0.04    | -18%  | 0.05    | +32%  |  |

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

## Major Chestnut Production Areas

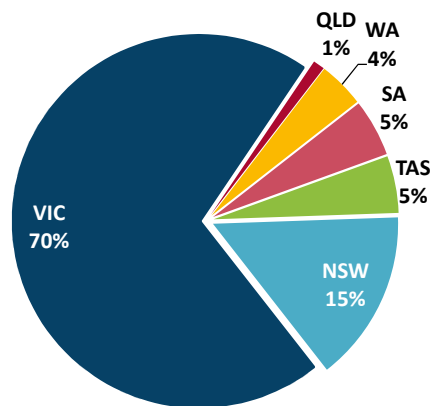
Chestnuts are produced in the southern states of Australia, requiring a cooler climate. The major production region is in the **north east of Victoria**.



Source: CAI



### 2016/17 Chestnut Production by State



Source: CAI

### Chestnut Harvest Season by State (In Shell)

| State             | 16/17 Tonnes | Jul     | Aug | Sep            | Oct | Nov  | Dec | Jan | Feb | Mar | Apr | May | Jun |
|-------------------|--------------|---------|-----|----------------|-----|------|-----|-----|-----|-----|-----|-----|-----|
| New South Wales   | 180          |         |     |                |     |      |     |     |     |     |     |     |     |
| Victoria          | 840          |         |     |                |     |      |     |     |     |     |     |     |     |
| Queensland        | 12           |         |     |                |     |      |     |     |     |     |     |     |     |
| Western Australia | 48           |         |     |                |     |      |     |     |     |     |     |     |     |
| South Australia   | 60           |         |     |                |     |      |     |     |     |     |     |     |     |
| Tasmania          | 60           |         |     |                |     |      |     |     |     |     |     |     |     |
| Harvest legend    |              | Harvest |     | End of Harvest |     | None |     |     |     |     |     |     |     |

Source: CAI



Images on pages 426 to 429 supplied courtesy of Chestnuts Australia Inc.





## Hazelnut Overview

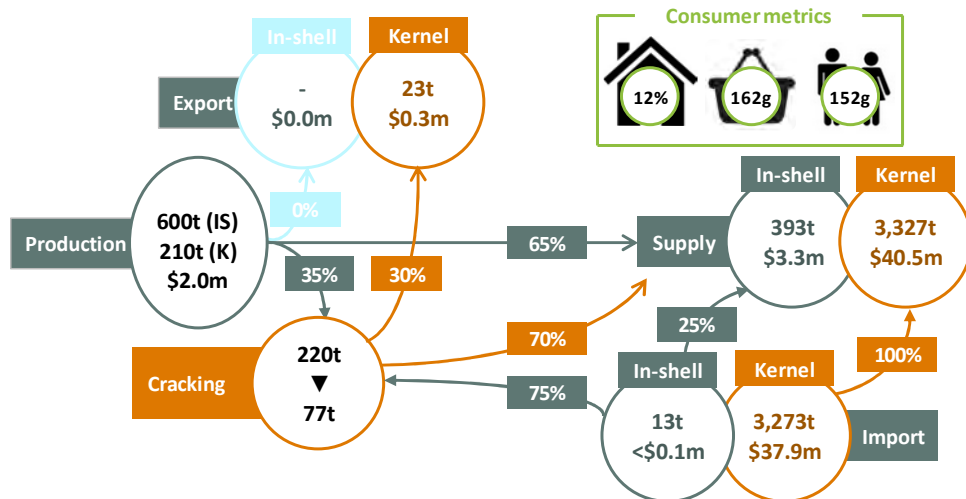
Hazelnuts are grown in the south of Australia, with production occurring in Victoria and New South Wales. The majority of hazelnuts are cracked and sold in kernel form.

For the year ending June 2017:

- **600 t** of hazelnuts (in-shell weight) was produced with a kernel weight equivalent (KWE) of **210 t**.
- The value of production was worth **\$2 m** while the wholesale value of hazelnuts in-shell and kernel supply was **\$43.7 m**, which combines local and imported product.
- **12%** of Australian households purchased hazelnuts, buying an average of **162 g** per shopping trip.
- The supply per capita of in-shell and kernel hazelnuts was **152 g**, based on the volume supplied.



## Hazelnut Supply Chain—Year Ending June 2017



Sources: AC; CFVIWA; GTA; Hazelnut Growers of Australia (HGA); MP & DD (Freshlogic Analysis)



| Year Ending June             | 2015    |         | 2016  |         | 2017  |  |
|------------------------------|---------|---------|-------|---------|-------|--|
|                              | Value   | Value   | % YoY | Value   | % YoY |  |
| Production (KWE t)           | 190     | 170     | -11%  | 210     | +24%  |  |
| Production (\$m)             | \$ 2.4  | \$ 2.0  | -17%  | \$ 2.0  | -1%   |  |
| Production area (Ha)         | 190     | 200     | +5%   | 210     | +5%   |  |
| Export Volume (KWE t)        | 45      | 40      | -11%  | 23      | -43%  |  |
| Export Value (\$m)           | \$ 0.9  | \$ 0.9  | <1%   | \$ 0.3  | -64%  |  |
| Import Volume (KWE t)        | 3,116   | 2,961   | -5%   | 3,277   | +11%  |  |
| Import Value (\$m)           | \$ 40.2 | \$ 44.9 | +12%  | \$ 38.0 | -15%  |  |
| Supply (KWE t)               | 3,261   | 3,091   | -5%   | 3,465   | +12%  |  |
| Supply Wholesale Value (\$m) | \$ 45.9 | \$ 48.7 | +6%   | \$ 43.7 | -10%  |  |
| Supply per Capita (kg)       | 0.15    | 0.14    | -7%   | 0.15    | +11%  |  |

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

\*Note: all volumes quoted in the table above are in KWE.

## Major Hazelnut Production Areas

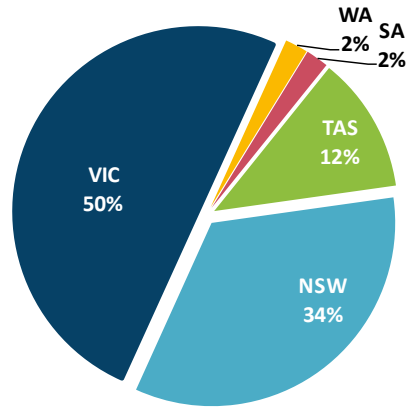
Hazelnuts are produced in the southern states of Australia, requiring a cooler climate. The major production regions are in **Myrtleford** in Victoria and **Orange** in New South Wales.



Source: HGA



### 2016/17 Hazelnut Production by State



Source: HGA

### Hazelnut Harvest Season by State (Kernel)

| State             | 16/17 Tonnes | Jul     | Aug | Sep            | Oct | Nov  | Dec | Jan | Feb     | Mar            | Apr | May | Jun |
|-------------------|--------------|---------|-----|----------------|-----|------|-----|-----|---------|----------------|-----|-----|-----|
| New South Wales   | 71           |         |     |                |     |      |     |     | Harvest | End of Harvest |     |     |     |
| Victoria          | 105          |         |     |                |     |      |     |     | Harvest | End of Harvest |     |     |     |
| Western Australia | 4            |         |     |                |     |      |     |     | Harvest | End of Harvest |     |     |     |
| South Australia   | 4            |         |     |                |     |      |     |     | Harvest | End of Harvest |     |     |     |
| Tasmania          | 25           |         |     |                |     |      |     |     | Harvest | End of Harvest |     |     |     |
| Harvest legend    |              | Harvest |     | End of Harvest |     | None |     |     |         |                |     |     |     |

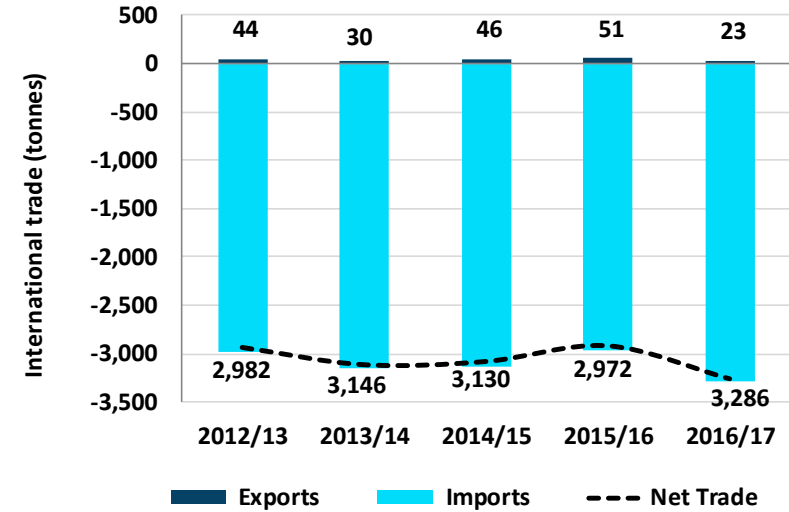
Source: HGA

### Hazelnut International Trade

Australia is a net importer of hazelnuts, with the majority of imports being in kernel form. For the year ending June 2017, Australia exported **23 tonnes** of kernel hazelnuts, while importing **13 tonnes** of in-shell hazelnuts (<1% of hazelnut imports) and **3,273 tonnes** of kernel hazelnuts (**99%** of imports). 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. The majority of imports are classified as to which country they are sourced from.



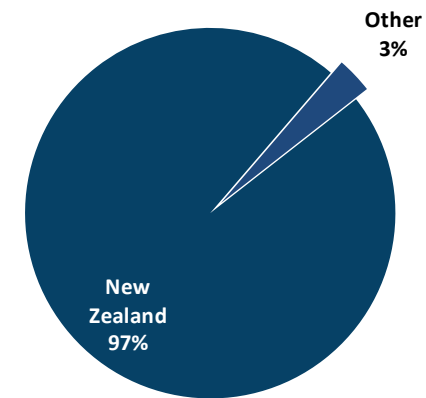
### Net Hazelnut International Trade



Source: GTA

For the year ending June 2017, **97%** of exported hazelnuts were sent to New Zealand, as profiled in the chart below.

### 2016/17 Hazelnut Exports by Country



Source: GTA



## Hazelnut Imports and Exports by State (both In-shell and Kernel)

| 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                       | 574          | 1,639        | 2,044        | Victoria                                       | 40        | 44        | 22        |
| Victoria                              | 413          | 1,163        | 1,052        | New South Wales                                | < 0.5     | -         | < 0.5     |
| Queensland                            | 43           | 150          | 168          | <b>Other</b>                                   | <b>5</b>  | <b>7</b>  | <b>1</b>  |
| Western Australia                     | -            | 20           | 22           | <b>TOTAL</b>                                   | <b>46</b> | <b>51</b> | <b>23</b> |
| <b>Other</b>                          | <b>2,100</b> | -            | <b>0</b>     |  |           |           |           |
| <b>TOTAL</b>                          | <b>3,130</b> | <b>2,972</b> | <b>3,286</b> |  |           |           |           |

## Hazelnut Imports and Exports by Country (both In-shell and Kernel)

| Imports by country (Tonnes) |              |                 |              | Exports by country (Tonnes) |                 |                 |                 |
|-----------------------------|--------------|-----------------|--------------|-----------------------------|-----------------|-----------------|-----------------|
| Year Ending June            | 2015         | 2016            | 2017         | Year Ending June            | 2015            | 2016            | 2017            |
| Turkey                      | 998          | 2,313           | 2,740        | New Zealand                 | 40              | 51              | 22              |
| Italy                       | -            | 420             | 334          | Sri Lanka                   | -               | -               | 1               |
| US                          | 31           | 59              | 72           | Brunei                      | < 0.5           | < 0.5           | < 0.5           |
| Azerbaijan                  | -            | -               | < 0.5        | New Caledonia               | 5               | -               | -               |
| Luxembourg                  | -            | 180             | -            | Hong Kong                   | < 0.5           | -               | -               |
| <b>Other</b>                | <b>2,100</b> | <b>&lt; 0.5</b> | <b>140</b>   | <b>Other</b>                | <b>&lt; 0.5</b> | <b>&lt; 0.5</b> | <b>&lt; 0.5</b> |
| <b>TOTAL</b>                | <b>3,130</b> | <b>2,972</b>    | <b>3,286</b> | <b>TOTAL</b>                | <b>46</b>       | <b>51</b>       | <b>23</b>       |

Source: GTA





## Macadamia Overview

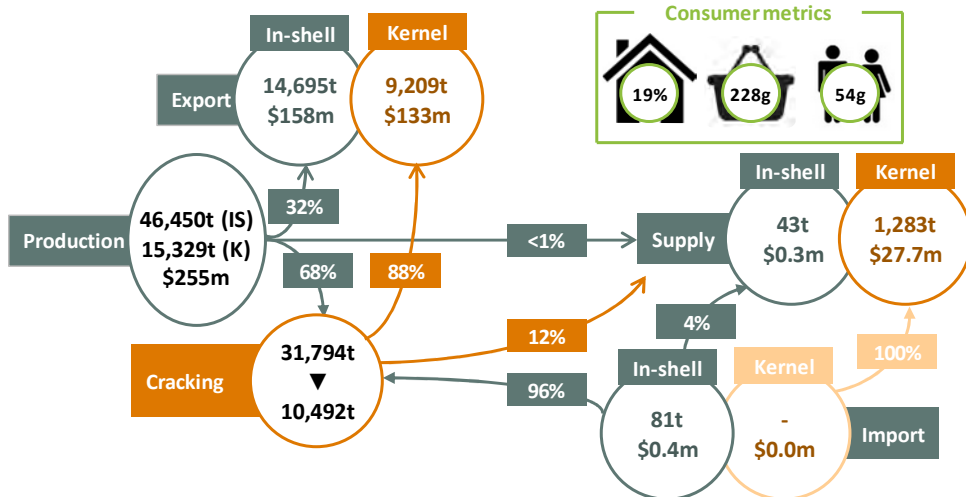
The macadamia industry has benefited from a sound export focused growth agenda and now exports **92%** of total production. Macadamia production occurs predominantly in northern NSW and Bundaberg. Majority are sold in kernel form, however there are also some export markets that prefer the in shell form.



For the year ending June 2017:

- **46,450 t** of macadamias (*in-shell weight at 3.5% moisture*) was produced with a kernel equivalent weight of **15,329 t**.
- The value of production was worth **\$255.5 m** while the wholesale value of macadamias in-shell and kernel supply was **\$28 m**.
- **19%** of Australian households purchased macadamias, buying an average of **228 g** per shopping trip.
- The supply per capita of in-shell and kernel macadamias was **54 g**, based on the volume supplied.

## Macadamia Supply Chain — Year Ending June 2017



Sources: ABS; AC; Australia Macadamia Society (AMS); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



| Year Ending June             | 2015     |          | 2016  |          | 2017  |  |
|------------------------------|----------|----------|-------|----------|-------|--|
|                              | Value    | Value    | % YoY | Value    | % YoY |  |
| Production (KWE t)           | 14,452   | 15,558   | +8%   | 15,329   | -1%   |  |
| Production (\$m)             | \$ 214.5 | \$ 247.3 | +15%  | \$ 255.5 | +3%   |  |
| Production area (Ha)         | 16,500   | 19,000   | +15%  | 19,000   | -     |  |
| Export Volume (KWE t)        | 8,602    | 11,950   | +39%  | 14,058   | +18%  |  |
| Export Value (\$m)           | \$ 152.4 | \$ 253.2 | +66%  | \$ 291.0 | +15%  |  |
| Import Volume (KWE t)        | 177      | 482      | >100% | 27       | -94%  |  |
| Import Value (\$m)           | \$ 0.7   | \$ 2.8   | >100% | \$ 0.4   | -86%  |  |
| Supply (KWE t)               | 6,027    | 4,090    | -32%  | 1,297    | -68%  |  |
| Supply Wholesale Value (\$m) | \$ 111.7 | \$ 89.1  | -20%  | \$ 28.0  | -69%  |  |
| Supply per Capita (kg)       | 0.26     | 0.17     | -34%  | 0.05     | -68%  |  |

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

\*Note: all volumes quoted in the table above are in KWE.

## Major Macadamia Production Areas

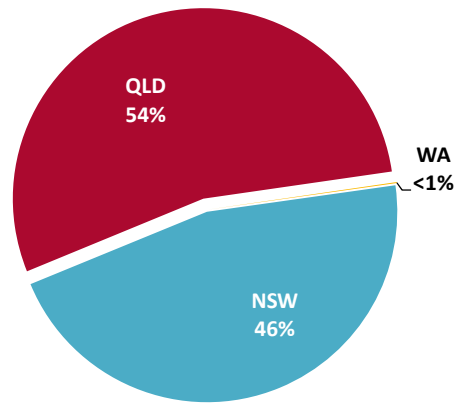
Macadamias are produced in the northern states of Australia, with production predominantly occurring in the coastal region of northern New South Wales and south east Queensland. Major production areas include the **Northern Rivers region** of New South Wales and the **Bundaberg region** of Queensland.



Source: AMS



## 2016/17 Macadamia Production by State



Source: AMS

## Macadamia Harvest Season by State (Kernel)

| State             | 16/17 Tonnes | Jul       | Aug       | Sep              | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun  |
|-------------------|--------------|-----------|-----------|------------------|-----|-----|-----|-----|-----|-----|-----|-----|------|
| New South Wales   | 7,051        | ■         | ■         | ■                |     |     |     |     |     |     |     |     |      |
| Queensland        | 8,266        | ■         | ■         |                  |     |     |     |     | ■   | ■   | ■   | ■   | ■    |
| Western Australia | 11           | ■         |           |                  |     |     |     | ■   | ■   | ■   | ■   | ■   | ■    |
| Harvest legend    |              | ■ Harvest | ■ Harvest | ■ End of Harvest |     |     |     |     |     |     |     |     | None |

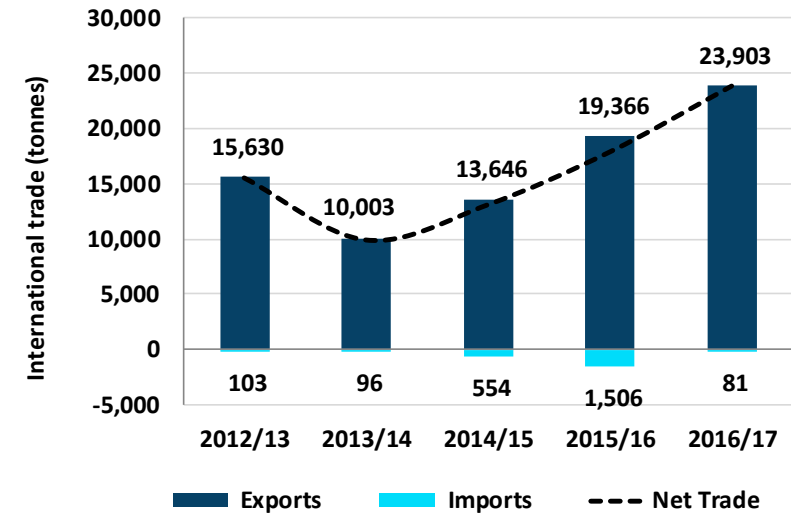
Source: AMS

## Macadamia International Trade

Australia is a net exporter of macadamias, with a small volume of imports, predominantly in-shell. For the year ending June 2017, Australia exported **14,695 tonnes** of macadamias in-shell and **9,209 tonnes** of macadamia kernels, and imported **81 tonnes** of macadamias in-shell. When exports are assessed on a kernel-weight equivalent (accounting for the heavier individual weight of in-shell macadamias), **66%** of exported macadamias were in a kernel form. 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. A large proportion of imports and exports are classified by their country or origin.



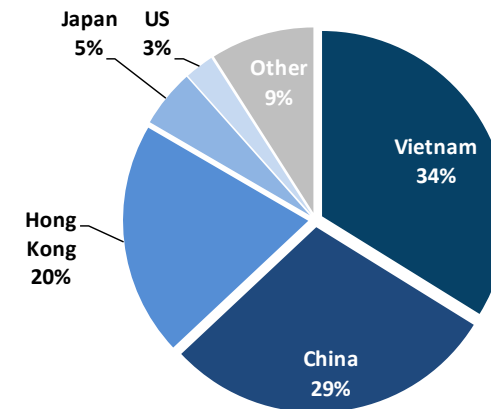
## Net Macadamia International Trade



Sources: AMS; GTA

For the year ending June 2017, **34%** of exported macadamia nuts were sent to Vietnam, as profiled in the chart below.

## 2016/17 Macadamia Exports by Country



Sources: AMS; GTA



## Macadamia Imports and Exports by State (both In-shell and Kernel)

| 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                            | 554        | 1,506        | 81           | Queensland                                     | 1,790         | 2,213         | 16,291        |
| <b>Other</b>                          | <b>277</b> | <b>2,433</b> | <b>2,200</b> | New South Wales                                | 3,871         | 3,545         | 10,776        |
| <b>TOTAL</b>                          | <b>831</b> | <b>3,939</b> | <b>2,281</b> | Western Australia                              | < 0.5         | 3             | 69            |
|                                       |            |              |              | Victoria                                       | 24            | 37            | 69            |
|                                       |            |              |              | <b>Other</b>                                   | <b>8,291</b>  | <b>18,510</b> | <b>1,174</b>  |
|                                       |            |              |              | <b>TOTAL</b>                                   | <b>13,976</b> | <b>24,308</b> | <b>28,378</b> |

## Macadamia Imports and Exports by Country (both In-shell and Kernel)

| Imports by country (Tonnes) |            |              |              | Exports by country (Tonnes) |               |               |               |
|-----------------------------|------------|--------------|--------------|-----------------------------|---------------|---------------|---------------|
| Year Ending June            | 2015       | 2016         | 2017         | Year Ending June            | 2015          | 2016          | 2017          |
| Unidentified                | 277        | 2,433        | 2,067        | Vietnam                     | 65            | 37            | 9,604         |
| Kenya                       | -          | -            | 59           | China                       | 4,874         | 7,614         | 8,278         |
| Hong Kong                   | -          | -            | 46           | Hong Kong                   | 283           | 459           | 5,777         |
| Malawi                      | -          | -            | 17           | Japan                       | 1,055         | 1,176         | 1,434         |
| Netherlands                 | -          | -            | 10           | US                          | 956           | 684           | 716           |
| <b>Other</b>                | <b>554</b> | <b>1,506</b> | <b>82</b>    | <b>Other</b>                | <b>6,744</b>  | <b>14,338</b> | <b>2,569</b>  |
| <b>TOTAL</b>                | <b>831</b> | <b>3,939</b> | <b>2,281</b> | <b>TOTAL</b>                | <b>13,976</b> | <b>24,308</b> | <b>28,378</b> |

Source: GTA





## Pecan Overview

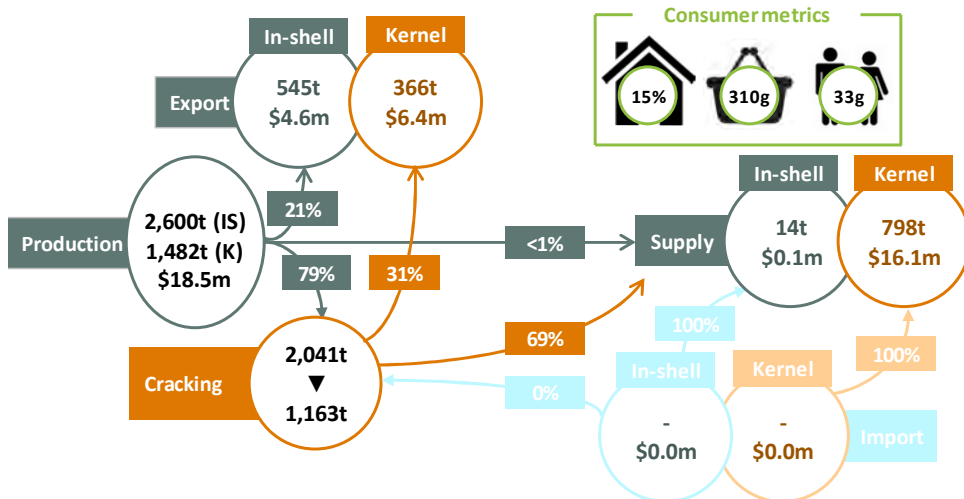
Pecan production is centred in northern New South Wales and south-eastern Queensland. The majority of pecans are sold domestically in kernel form, however there is a small export market.



For the year ending June 2017:

- **2,600 t** of pecans (in-shell weight) was produced with a kernel equivalent weight of **1,482 t**.
- The value of production was worth **\$18.5 m** while the wholesale value of pecans in-shell and kernel supply was **\$16.2 m**.
- **15%** of Australian households purchased pecans, buying an average of **310 g** per shopping trip.
- The supply per capita of in-shell and kernel pecans was **33 g**, based on the volume supplied.

## Pecan Supply Chain—Year Ending June 2017



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



| Year Ending June             | 2015    |         | 2016  |         | 2017  |  |
|------------------------------|---------|---------|-------|---------|-------|--|
|                              | Value   | Value   | % YoY | Value   | % YoY |  |
| Production (KWE t)           | 1,988   | 2,012   | +1%   | 1,482   | -26%  |  |
| Production (\$m)             | \$ 17.5 | \$ 24.2 | +38%  | \$ 18.5 | -24%  |  |
| Production area (Ha)         | 1,550   | 1,550   | -     | 1,550   | -     |  |
| Export Volume (KWE t)        | 616     | 729     | +18%  | 676     | -7%   |  |
| Export Value (\$m)           | \$ 7.1  | \$ 10.6 | +50%  | \$ 11.0 | +4%   |  |
| Import Volume (KWE t)        | -       | -       | -     | -       | -     |  |
| Import Value (\$m)           | \$ -    | \$ -    | -     | \$ -    | -     |  |
| Supply (KWE t)               | 1,373   | 1,283   | -7%   | 806     | -37%  |  |
| Supply Wholesale Value (\$m) | \$ 17.1 | \$ 18.6 | +9%   | \$ 16.2 | -13%  |  |
| Supply per Capita (kg)       | 0.06    | 0.05    | -8%   | 0.03    | -38%  |  |

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

\*Note: all volumes quoted in the table above are in KWE.

## Major Pecan Production Areas

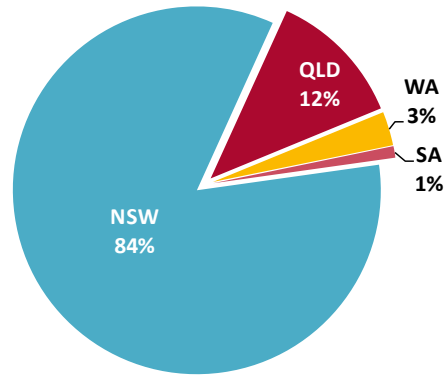
Pecans are predominantly produced in New South Wales, with the majority of production occurring in the **Gwydir Valley** in northern inland New South Wales.



Source: APGA



### 2016/17 Pecan Production by State



Source: APGA

### Pecan Harvest Season by State (In-shell)

| State             | 16/17 Tonnes | Jul | Aug     | Sep | Oct | Nov            | Dec | Jan | Feb  | Mar | Apr | May | Jun |
|-------------------|--------------|-----|---------|-----|-----|----------------|-----|-----|------|-----|-----|-----|-----|
| New South Wales   | 2,184        | ■   |         |     |     |                |     |     |      |     | ■   | ■   | ■   |
| Queensland        | 312          | ■   |         |     |     |                |     |     |      |     | ■   | ■   | ■   |
| Western Australia | 78           | ■   |         |     |     |                |     |     |      |     | ■   | ■   | ■   |
| South Australia   | 26           | ■   |         |     |     |                |     |     |      |     | ■   | ■   | ■   |
| Harvest legend    |              | ■   | Harvest |     | ■   | End of Harvest |     |     | None |     |     |     |     |

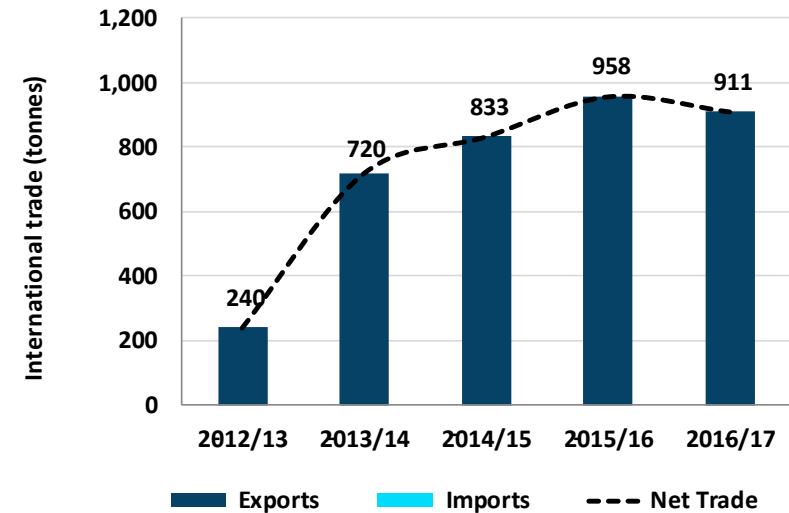
Source: APGA

### Pecan International Trade

Australia is a net exporter of pecans, with the majority of exports being in in-shell form. For the year ending June 2017, Australia exported **545 tonnes** of in-shell pecans (**60%** of pecan exports) and **366 tonnes** of kernel pecans (**40%** of exports). The exports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



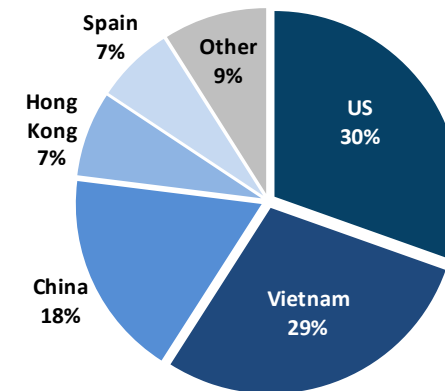
### Net Pecan International Trade



Source: GTA

For the year ending June 2017, **30%** of exported pecans were sent to the United States, as profiled in the chart below.

### 2016/17 Pecan Exports by Country



Source: GTA





Pecan Exports by State (both In-shell and Kernel)

| Exports by state of production origin (Tonnes) |            |            |            |
|--|------------|------------|------------|
| Year Ending June                               | 2015       | 2016       | 2017       |
| New South Wales                                | 700        | 841        | 820        |
| Queensland                                     | 104        | 92         | 70         |
| Victoria                                       | 27         | 22         | 15         |
| <b>Other</b>                                   | <b>2</b>   | <b>2</b>   | <b>6</b>   |
| <b>TOTAL</b>                                   | <b>833</b> | <b>958</b> | <b>911</b> |

Pecan Exports by Country (both In-shell and Kernel)

| Exports by country (Tonnes) |            |            |            |
|-----------------------------|------------|------------|------------|
| Year Ending June            | 2015       | 2016       | 2017       |
| US                          | 185        | 219        | 277        |
| Vietnam                     | 413        | 517        | 261        |
| China                       | 12         | 95         | 163        |
| Hong Kong                   | 87         | 1          | 67         |
| Spain                       | 12         | 24         | 61         |
| <b>Other</b>                | <b>125</b> | <b>102</b> | <b>82</b>  |
| <b>TOTAL</b>                | <b>833</b> | <b>958</b> | <b>911</b> |

Source: GTA





## Pistachios Overview

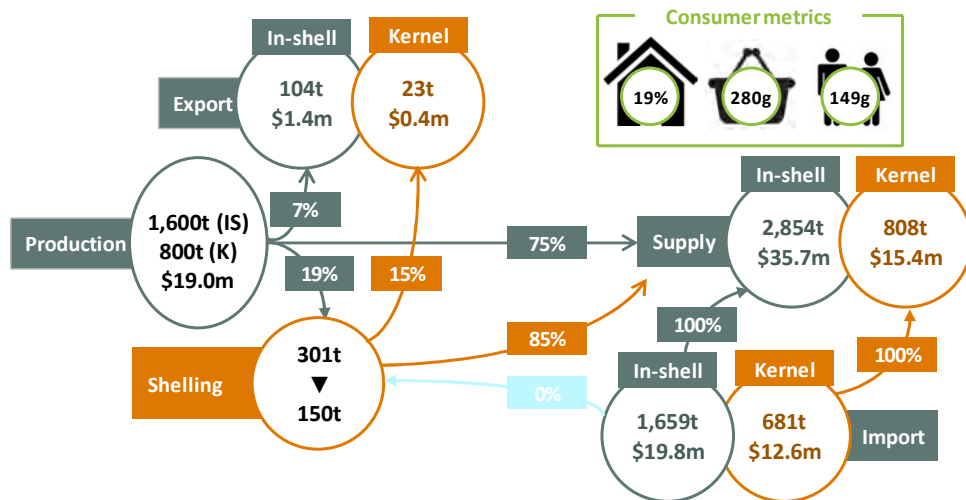
Pistachios are grown in the south of Australia, with the majority of production occurring in Victoria. Pistachio production follows a biennial pattern with high & low years and are predominately sold in-shell.



For the year ending June 2017:

- **1,600 t** of pistachios (in-shell weight) was produced with a kernel equivalent weight of **800 t**.
- The value of Australian production was worth **\$19.0 m**.
- The wholesale value of pistachios in-shell and kernel supply was **\$51.1 m**.
- **19%** of Australian households purchased pistachios, buying an average of **280 g** per shopping trip.
- The supply per capita of in-shell and kernel pistachios was **149 g**, based on the volume supplied.

## Pistachio 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 |  |
| Production (ISWE t)          | 1,750   | 2,000   | +14%  | 1,600   | -20%  |  |
| Production (\$m)             | \$ 25.1 | \$ 32.2 | +28%  | \$ 19.0 | -41%  |  |
| Production area (Ha)         | 950     | 1,100   | +16%  | 1,200   | +9%   |  |
| Export Volume (t)            | 36      | 300     | >100% | 127     | -58%  |  |
| Export Value (\$m)           | \$ 0.8  | \$ 4.6  | >100% | \$ 1.8  | -61%  |  |
| Import Volume (t)            | 1,889   | 1,894   | <1%   | 2,340   | +24%  |  |
| Import Value (\$m)           | \$ 32.2 | \$ 35.1 | +9%   | \$ 32.3 | -8%   |  |
| Supply (t)                   | 3,443   | 3,318   | -4%   | 3,662   | +10%  |  |
| Supply Wholesale Value (\$m) | \$ 57.4 | \$ 61.3 | +7%   | \$ 51.1 | -17%  |  |
| Supply per Capita (kg)       | 0.14    | 0.14    | -5%   | 0.15    | +9%   |  |

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

## Major Pistachio Production Areas

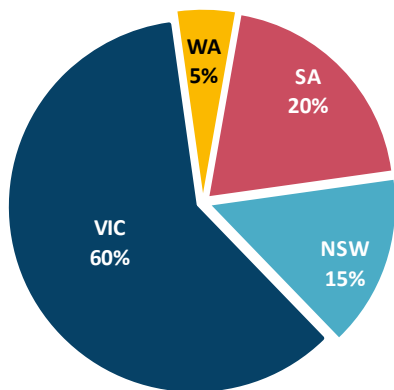
The major production areas are along the **Murray River Valley** between Swan Hill in Victoria and **Waikerie** in South Australia. Further plantings are in central west Victoria and Pinnaroo, South Australia. There are also a small number of growers in central NSW; southern Victoria and Western Australia.



Sources: ANIC; (Freshlogic Analysis)



### 2016/17 Pistachio Production by State



Source: (Freshlogic Analysis)

### Pistachio Harvest Season by State (In-shell)

| State             | 16/17 Tonnes | Jul | Aug     | Sep | Oct            | Nov | Dec | Jan | Feb     | Mar     | Apr     | May | Jun |
|-------------------|--------------|-----|---------|-----|----------------|-----|-----|-----|---------|---------|---------|-----|-----|
| New South Wales   | 240          |     |         |     |                |     |     |     | Harvest | Harvest | Harvest |     |     |
| Victoria          | 960          |     |         |     |                |     |     |     | Harvest | Harvest | Harvest |     |     |
| Western Australia | 80           |     |         |     |                |     |     |     | Harvest | Harvest | Harvest |     |     |
| South Australia   | 320          |     |         |     |                |     |     |     | Harvest | Harvest | Harvest |     |     |
| Harvest legend    |              |     | Harvest |     | End of Harvest |     |     |     |         |         | None    |     |     |

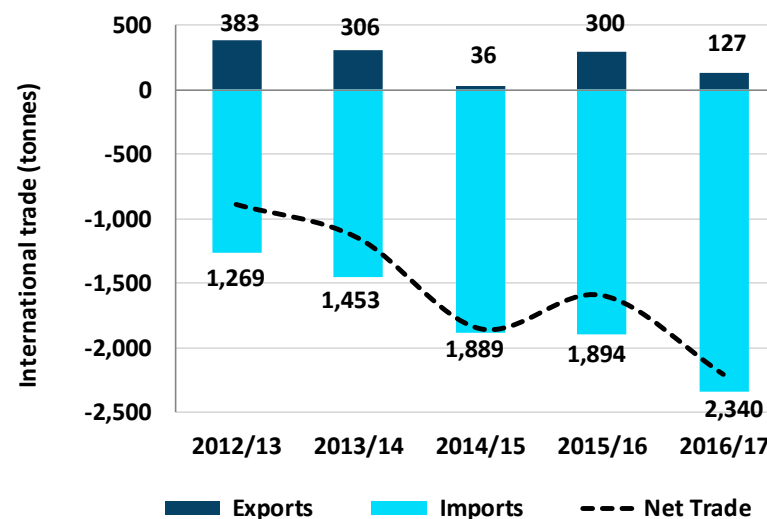
Source: (Freshlogic Analysis)

### Pistachio International Trade

Australia is a net importer of pistachios, with the majority of imports being in in-shell form. For the year ending June 2017, Australia exported **104 tonnes** of in-shell pistachios (**81%** of pistachio exports) and **23 tonnes** of kernel pistachios (**19%** of exports), while importing **1,659 tonnes** of in-shell pistachios (**71%** of pistachio imports) and **681 tonnes** of kernel pistachios (**29%** of imports). 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. A large proportion of imports are classified as to which country they are sourced from.



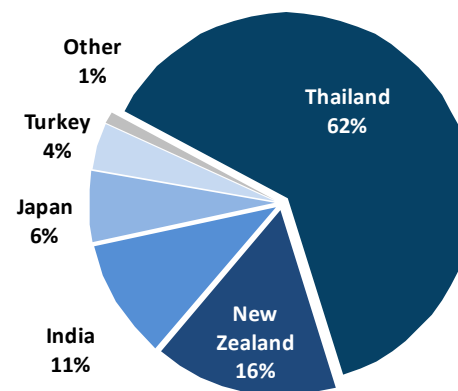
### Net Pistachio International Trade



Source: GTA; (Freshlogic Analysis)

For the year ending June 2017, **62%** of exported pistachios were sent to Thailand, as profiled in the chart below.

### 2016/17 Pistachio Exports by Country



Source: GTA; (Freshlogic Analysis)



## Pistachio Imports and Exports by State (both In-shell and Kernel)

| 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                              | 301          | 609          | 1,090        | Victoria                                       | 10        | 256        | 120        |
| New South Wales                       | 123          | 313          | 402          | New South Wales                                | < 0.5     | 1          | 1          |
| South Australia                       | 122          | 269          | 142          | South Australia                                | -         | 14         | < 0.5      |
| Queensland                            | 73           | 119          | 78           | Queensland                                     | -         | < 0.5      | -          |
| Western Australia                     | -            | 4            | 25           | <b>Other</b>                                   | <b>26</b> | <b>29</b>  | <b>5</b>   |
| <b>Other</b>                          | <b>1,269</b> | <b>580</b>   | <b>603</b>   | <b>TOTAL</b>                                   | <b>36</b> | <b>300</b> | <b>127</b> |
| <b>TOTAL</b>                          | <b>1,889</b> | <b>1,894</b> | <b>2,340</b> |  |           |            |            |

## Pistachio Imports and Exports by Country (both In-shell and Kernel)

| Imports by country (Tonnes) |              |              |              | Exports by country (Tonnes) |           |            |            |
|-----------------------------|--------------|--------------|--------------|-----------------------------|-----------|------------|------------|
| Year Ending June            | 2015         | 2016         | 2017         | Year Ending June            | 2015      | 2016       | 2017       |
| US                          | 436          | 835          | 1,392        | Thailand                    | -         | 26         | 78         |
| Iran                        | 124          | 314          | 295          | New Zealand                 | 26        | 57         | 20         |
| Turkey                      | 2            | 137          | 32           | India                       | -         | 27         | 13         |
| Greece                      | -            | 1            | 13           | Japan                       | -         | 6          | 8          |
| Germany                     | 2            | 3            | 2            | Turkey                      | -         | 14         | 5          |
| <b>Other</b>                | <b>1,324</b> | <b>604</b>   | <b>606</b>   | <b>Other</b>                | <b>10</b> | <b>171</b> | <b>3</b>   |
| <b>TOTAL</b>                | <b>1,889</b> | <b>1,894</b> | <b>2,340</b> | <b>TOTAL</b>                | <b>36</b> | <b>300</b> | <b>127</b> |

Source: GTA; (Freshlogic Analysis)





## Walnuts Overview

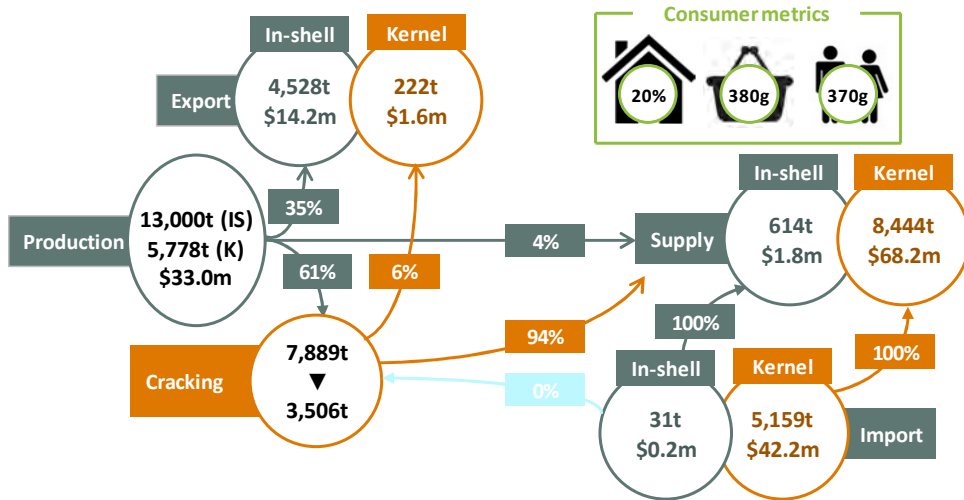
Walnuts are grown across Australia, with the majority of production occurring in New South Wales. Walnuts have a strong export focus, with a significant volume of the Australian production being sold locally in-shell.



For the year ending June 2017:

- **13,000 t** of walnuts (in-shell weight) was produced with a kernel equivalent weight of **5,778 t**.
- The value of production was worth **\$33 m** while the wholesale value of walnuts in-shell and kernel supply was **\$70 m**.
- **20%** of Australian households purchased walnuts, buying an average of **380 g** per shopping trip.
- The supply per capita of in-shell and kernel walnuts was **370 g**, based on the volume supplied.

### Walnut Supply Chain — Year Ending June 2017



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

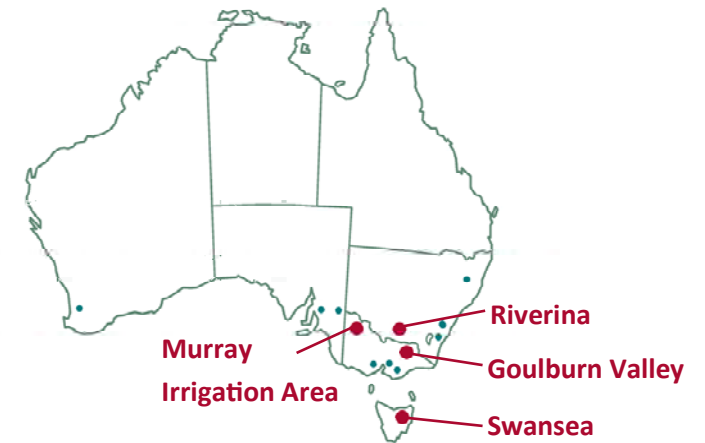


| Year Ending June             | 2015    |         | 2016  |         | 2017  |  |
|------------------------------|---------|---------|-------|---------|-------|--|
|                              | Value   | Value   | % YoY | Value   | % YoY |  |
| Production (ISWE t)          | 11,205  | 6,500   | -42%  | 13,000  | +100% |  |
| Production (\$m)             | \$ 46.9 | \$ 23.0 | -51%  | \$ 33.0 | +44%  |  |
| Production area (Ha)         | 2,980   | 3,600   | +21%  | 3,890   | +8%   |  |
| Export Volume (t)            | 4,524   | 2,910   | -36%  | 4,750   | +63%  |  |
| Export Value (\$m)           | \$ 25.7 | \$ 14.2 | -45%  | \$ 15.9 | +12%  |  |
| Import Volume (t)            | 4,548   | 5,137   | +13%  | 5,191   | +1%   |  |
| Import Value (\$m)           | \$ 59.4 | \$ 50.9 | -14%  | \$ 42.3 | -17%  |  |
| Supply (t)                   | 7,805   | 6,723   | -14%  | 9,058   | +35%  |  |
| Supply Wholesale Value (\$m) | \$ 85.2 | \$ 84.0 | -1%   | \$ 70.0 | -17%  |  |
| Supply per Capita (kg)       | 0.33    | 0.28    | -15%  | 0.37    | +33%  |  |

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

## Major Walnut Production Areas

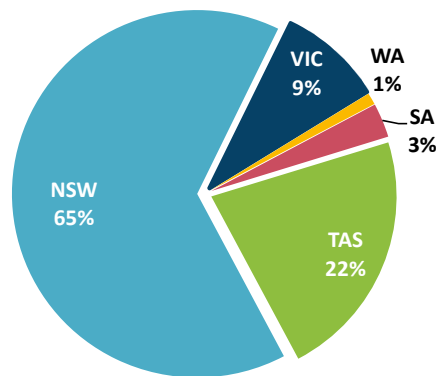
Walnuts are produced in the southern states of Australia, with the majority of production occurring in New South Wales. Major production regions include the **Riverina** in NSW; the **Goulburn Valley** and **Murray Irrigation Area** of Victoria; and the **Swansea** region in Tasmania.



Source: Wala



### 2016/17 Walnut Production by State



Source: Wala

### Walnuts Harvest Season by State (In-shell)

| State             | 16/17 Tonnes | Jul     | Aug     | Sep | Oct | Nov            | Dec | Jan | Feb | Mar     | Apr            | May | Jun |
|-------------------|--------------|---------|---------|-----|-----|----------------|-----|-----|-----|---------|----------------|-----|-----|
| New South Wales   | 8,450        | Harvest | Harvest |     |     |                |     |     |     |         | End of Harvest |     |     |
| Victoria          | 1,170        | Harvest |         |     |     |                |     |     |     |         |                |     |     |
| Western Australia | 130          | Harvest |         |     |     |                |     |     |     |         |                |     |     |
| South Australia   | 390          |         |         |     |     |                |     |     |     | Harvest | Harvest        |     |     |
| Tasmania          | 2,860        | Harvest | Harvest |     |     |                |     |     |     |         |                |     |     |
| Harvest legend    |              | Harvest | Harvest |     |     | End of Harvest |     |     |     |         | None           |     |     |

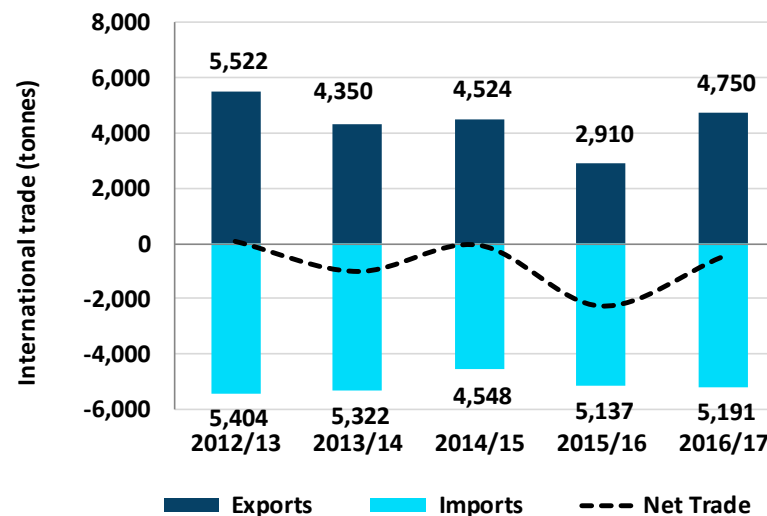
Source: Wala

### Walnuts International Trade

Australia has traditionally been a net importer of walnuts, although exports have been growing in recent years. For the year ending June 2017, Australia exported **4,528 tonnes** of in-shell walnuts (**95%** of walnuts exports) and **222 tonnes** of kernel walnuts (**2%** of exports), while importing **31 tonnes** of in-shell walnuts (**<1%** of walnut imports) and **5,159 tonnes** of kernel walnuts (**99%** of imports). 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. A large proportion of imports are classified as to which country they are sourced from.



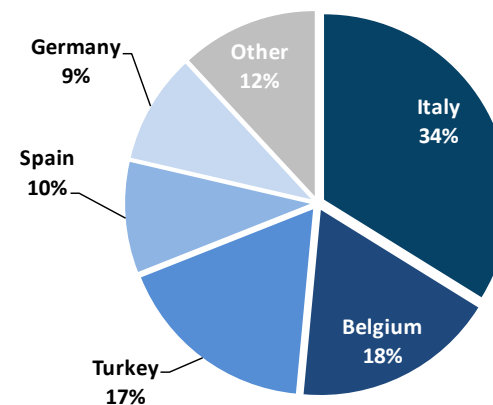
### Net Walnut International Trade



Source: GTA

For the year ending June 2017, **34%** of exported walnuts were sent to Italy, as profiled in the chart below.

### 2016/17 Walnut Exports by Country



Source: GTA



Walnut Imports and Exports by State (both In-shell and Kernel)

| 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                              | 10           | 31           | 2,995        | New South Wales                                | 4,446        | 2,881        | 4,663        |
| New South Wales                       | 1            | < 0.5        | 1,480        | Victoria                                       | 12           | 22           | 61           |
| Queensland                            | -            | -            | 354          | Queensland                                     | 1            | 2            | 2            |
| South Australia                       | -            | -            | 264          | Western Australia                              | -            | < 0.5        | 1            |
| Western Australia                     | -            | 1            | 98           | <b>Other</b>                                   | <b>65</b>    | <b>6</b>     | <b>22</b>    |
| <b>Other</b>                          | <b>4,537</b> | <b>5,105</b> | <b>-</b>     | <b>TOTAL</b>                                   | <b>4,524</b> | <b>2,910</b> | <b>4,750</b> |
| <b>TOTAL</b>                          | <b>4,548</b> | <b>5,137</b> | <b>5,191</b> |  |              |              |              |

Walnut Imports and Exports by Country (both In-shell and Kernel)

| Imports by country (Tonnes) |              |              |              | Exports by country (Tonnes) |              |              |              |
|-----------------------------|--------------|--------------|--------------|-----------------------------|--------------|--------------|--------------|
| Year Ending June            | 2015         | 2016         | 2017         | Year Ending June            | 2015         | 2016         | 2017         |
| US                          | 1            | 32           | 4,936        | Italy                       | 2,056        | 1,286        | 1,607        |
| Chile                       | -            | -            | 167          | Belgium                     | 21           | 366          | 839          |
| China                       | -            | < 0.5        | 38           | Turkey                      | -            | 179          | 831          |
| Moldova                     | -            | -            | 20           | Spain                       | 421          | -            | 457          |
| India                       | -            | -            | 12           | Germany                     | 576          | 468          | 451          |
| <b>Other</b>                | <b>4,547</b> | <b>5,105</b> | <b>17</b>    | <b>Other</b>                | <b>1,450</b> | <b>610</b>   | <b>565</b>   |
| <b>TOTAL</b>                | <b>4,548</b> | <b>5,137</b> | <b>5,191</b> | <b>TOTAL</b>                | <b>4,524</b> | <b>2,910</b> | <b>4,750</b> |

Source: GTA

