



# **Australian Horticulture Statistics Handbook 2019/20**

## **FRUIT**

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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 2020.

### 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 10 to 12 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 2020 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 adversely impacted by drought that caused levels of crop losses and summer bushfires escalated and ran into February to impair east coast interstate logistics and deter regional tourism.

In February 2020 the impact of Covid-19 started with bans on international travel and rising concerns with Australian consumers about health impacts. By March the situation escalated into social distancing guidelines into lock downs, levels of panic food buying at retail and the closure of dining out venues.

The flow on impact for the year had the retail channel increasing its share of household food expenditure as food service channels were constrained.

In these conditions the amenity categories enjoyed increase demand as consumers in lock down and who couldn't travel, sought to improve their homes.

The wholesale value per kg of fresh fruit and vegetables supplied to the local market increased by 4% to \$2.71 per kg.

Total fresh horticulture exports were valued at **\$2.71 billion** in 2019/20, 2% higher than the previous year. The increase in export value was driven predominately by Table Grapes and Mandarins.

Export market success continues to be the driver of industry growth.



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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 2020 is presented by Horticulture Innovation Australia for the purpose of consolidating horticulture statistical information for use by horticulture industry members and other stakeholders.

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

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

Where additional information has led to a change in the previously quoted value from the 2018/19 edition for a category, this has been noted on the page of the relevant category.

Any comments regarding the Handbook should be forwarded to Hort Innovation at: [feedback@horticulture.com.au](mailto:feedback@horticulture.com.au)

The 2019/20 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
2019/20	Year ending 30 June 2020
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.

**Retail**— The retailers who on sell fruit and vegetables to consumers. This encompasses all forms of retailing including; supermarkets, greengrocers, farmers markets, specialty food stores and online offers.

**Food Service**— The enterprises who use fruit and vegetables as an ingredient in assembling meals. This encompasses all forms of meal provision including; restaurants, cafes, fast food, hotels, travel and event providers, hospitals, schools and other similar institutions.

## Research Method

### 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.

Information on the **retail and food service channels** is defined by separating the fresh market total volume arrived at by the Freshlogic's THRUChain modelling system, into two channels. Retail volumes are defined to accommodate the total volume of household purchases of fruit and vegetables. The resulting food service volumes are then validated with a network of food service providers. The values of product sold for both channels are based on the wholesale prices.

**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 2020 according to the ABS. The number of occupied households is assumed at 9.12 million and the population at 25.8 million for the 2019/20 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 22 and 23.

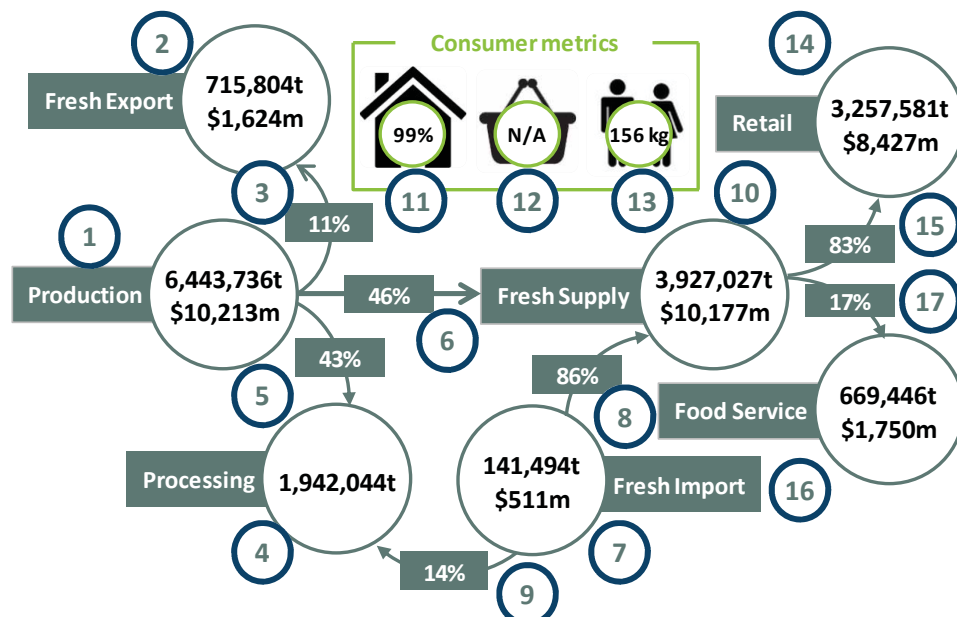
\*ABS, Australian Demographic Statistics cat. no. 3101.0

\*\*ABS, Agricultural Commodities cat. no. 7121.0

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 2020. It contains the following elements:



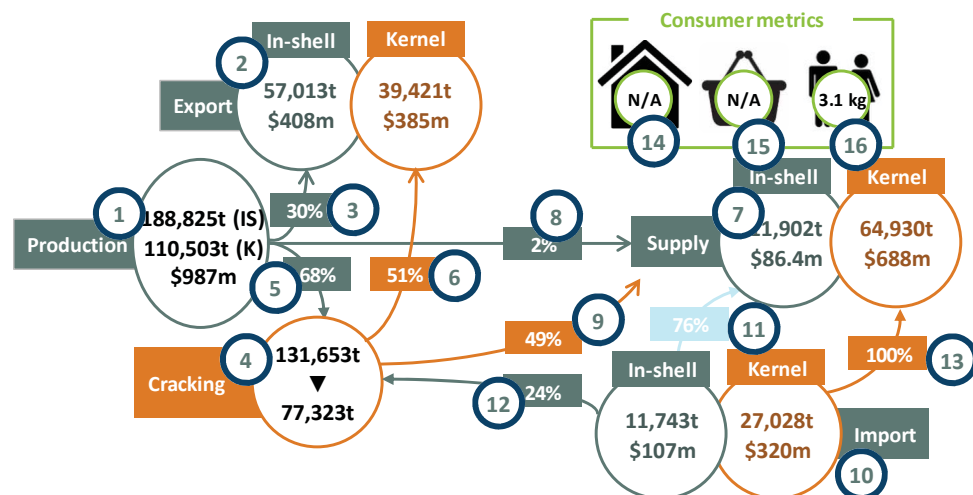
1. **Production.** This is the volume of the category grown in Australia over the year ending June 2020. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
2. **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 2020. '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 2020. 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.
14. **Retail.** The volume of the category that went into the Australian retail market. This profiles the Retail Volume (volume in tonnes), and the Retail Wholesale Value in million dollars, which is the value of the Retail at a wholesale market level.
15. **Retail Share.** The percentage of fresh supply that was sent to the Australian fresh Retail market.
16. **Food Service.** The volume of the category that went into the Australian food service market. This profiles the Food Service Volume (volume in tonnes), and the Food Service Wholesale Value in million dollars, which is the value of Food Service at a wholesale market level.
17. **Food Service Share.** The percentage of fresh supply that was sent to the Australian fresh Food Service market.



## Supply chain—Nuts & Olives

This example supply chain outlines the flow of a nut category over the year ending June 2020. 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 2020. 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.

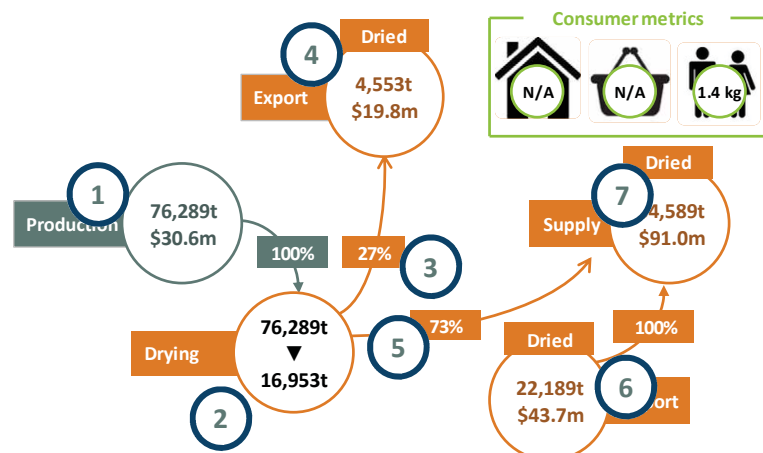
- 6. Kernel Export Share.** The percentage share of cracked **Kernel** that was exported.
- 7. Supply.** This is the volume of the category available to the Australian market. It includes both **Production** that was sold into the market, as well as Imports that were sold into the market. This profiles 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 2020. See page 15 for full definition.
- 15. Average Purchase Quantity.** The average quantity purchased at retail per shopping trip by Australian households over the year ending June 2020. 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: Supply into retail and food service are not reported for Nuts & Olives.*

*Note: 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 2020. It contains the following elements:



- 1. Production.** The volume of the category grown in Australia over the year ending June 2020. 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.

*Note: Supply into retail and food service are not reported for Dried & Canned Fruit.*

## Data Tables

These tables are provided for each category. They profile key elements over the last three years (for the years ending June 2018, June 2019 and June 2020), as well as the percentage change in value year on year. They contain:

Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	315,183	310,876	-1%	301,792	-3%
Production (\$m)	\$ 465.3	\$ 512.8	+10%	\$ 578.7	+13%
Producing Trees (000 Trees)	11,421	11,421	-	11,421	-
Fresh Export Volume (t)	5,058	4,416	-13%	2,953	-33%
Fresh Export Value (\$m)	\$ 11.3	\$ 10.6	-6%	\$ 7.6	-28%
Fresh Import Volume (t)	1,145	732	-36%	786	+7%
Fresh Import Value (\$m)	\$ 2.9	\$ 1.9	-35%	\$ 1.9	<1%
Fresh Supply (t)	219,115	213,712	-2%	213,398	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 519.5	\$ 572.6	+10%	\$ 652.4	+14%
Supply per Capita (kg)	8.79	8.48	-4%	8.27	-2%
Retail Supply (t)	-	185,032	-	189,117	+2%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 495.8	-	\$ 578.2	+17%
Food Service Supply (t)	-	28,680	-	24,281	-15%
Food Service Wholesale Value (\$m)	\$ -	\$ 76.8	-	\$ 74.2	-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.

## How to use this book

- **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.
- **Retail Supply Volume and Value.** The volume in tonnes and the value in million dollars of the category that went into the Australian retail market in a fresh form over the year.
- **Food Service Volume and Value.** The volume in tonnes and the value in million dollars of the category that went into the Australian food service market in a fresh form over the year.

## Common Data Sources

Abbreviation	Data Source	Further information
<b>ABS</b>	Agricultural Commodities, Australian Bureau of Statistics	Information from <i>Agricultural Commodities cat. no. 7121.0, 2019-18, 2017-18, 2016-17, 2015-16, 2014-15 and 2013-14 editions has been compiled. Australian Demographic Statistics cat. no. 3101.0 June 2020 edition. 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>

Abbreviation	Data Source	Further information
<b>IRB</b>	Industry Representative Bodies	Consultation with informed bodies to ensure information reconciles.  The abbreviation 'IRB' is listed where multiple industry bodies were contacted for a category/group.  Where one industry body was contacted for an individual category, the relevant name is listed.
<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>AL19005</b> (Almonds)	<i>Australian Almond Industry Statistics and Data collection 2020-2022</i>
<b>AP16002</b> (Apple/Pear)	<i>Apple and Pear Crop Estimate</i>
<b>AV20000</b> (Avocado)	<i>Avocado industry and market data capture and analysis</i>
<b>CT18002</b> (Citrus)	<i>Citrus Market Development; Market Access and Quality</i>
<b>CU15000</b> (Custard Apple)	<i>Custard Apple Dispatch System 2—CADS 2</i>
<b>MC18003</b> (Macadamias)	<i>Macadamia Crop Forecasting 2020-2022</i>
<b>MG17000</b> (Mangoes)	<i>Building best management practice capacity for the Australian mango industry</i>
<b>MT15031</b> (Dried Grapes)	<i>Australian Dried Fruit Communications Program</i>
<b>NY17008</b> (Nursery)	<i>Nursery Industry Statistics 2017/18 to 2019/20</i>
<b>OL16001</b> (Olives)	<i>Australian Olive Industry Benchmarking Program</i>
<b>PI17001</b> (Pineapples)	<i>Pineapple integrated crop protection program</i>

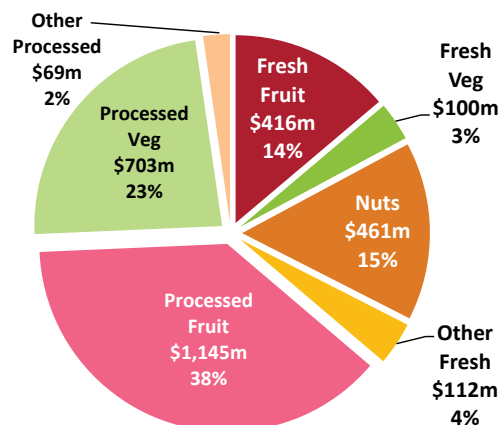
## Data sharing-List of projects

<u>Project Code</u>	<u>Project Title</u>
<b>TU17005</b> (Turf)	<i>Turf industry statistics 2017/18 to 2019/20</i>
<b>TM17000</b> (Tomatoes)	<i>Processing Tomato Industry capacity building</i>
<b>VG15077</b> (Vegetables)	<i>Financial Performance of Australian Vegetable farms 2016-2017 to 2018-2019</i>



## Total Imports

For the year ending June 2020, Australia imported **\$3.01 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.



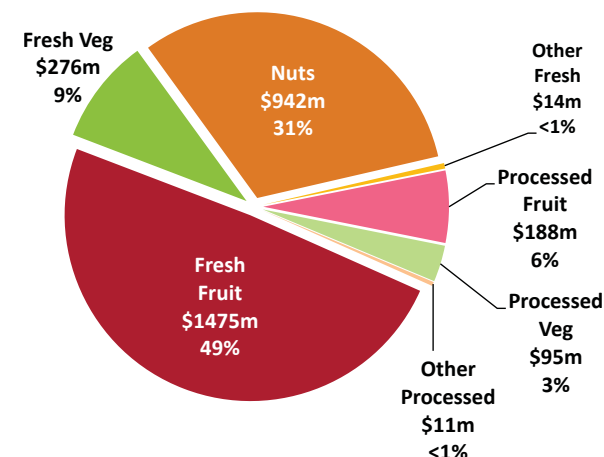
Sources: GTA; (Freshlogic Analysis)

<b>Fresh Fruit</b> .....	<b>\$415.9m</b>	<b>Other Fresh Horticulture</b> .....	<b>\$112.0m</b>
Grapes .....	\$85.1m	Cut Flowers .....	\$74.2m
Avocados .....	\$79.8m	Live Plants .....	\$19.4m
Kiwifruit .....	\$69.5m	Bulbs .....	\$18.4m
<b>Fresh Vegetables</b> .....	<b>\$100.2m</b>	<b>Processed Fruit</b> .....	<b>\$1,145.5m</b>
Garlic .....	\$41.6m	Olives and Olive Oil .....	\$245.3m
Asparagus .....	\$21.6m	Dried Grapes .....	\$67.7m
Mushrooms .....	\$13.8m	Dried Tree Fruits .....	\$50.1m
<b>Nuts</b> .....	<b>\$462.6m</b>	<b>Processed Vegetables</b> .....	<b>\$703.1m</b>
Cashews .....	\$157.7m	Potatoes .....	\$204.9m
Walnuts .....	\$44.2m	Tomatoes .....	\$154.4m
Hazelnuts .....	\$37.6m	Beans .....	\$71.3m



## Total Exports

For the year ending June 2020, Australia exported **\$3.00 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.*



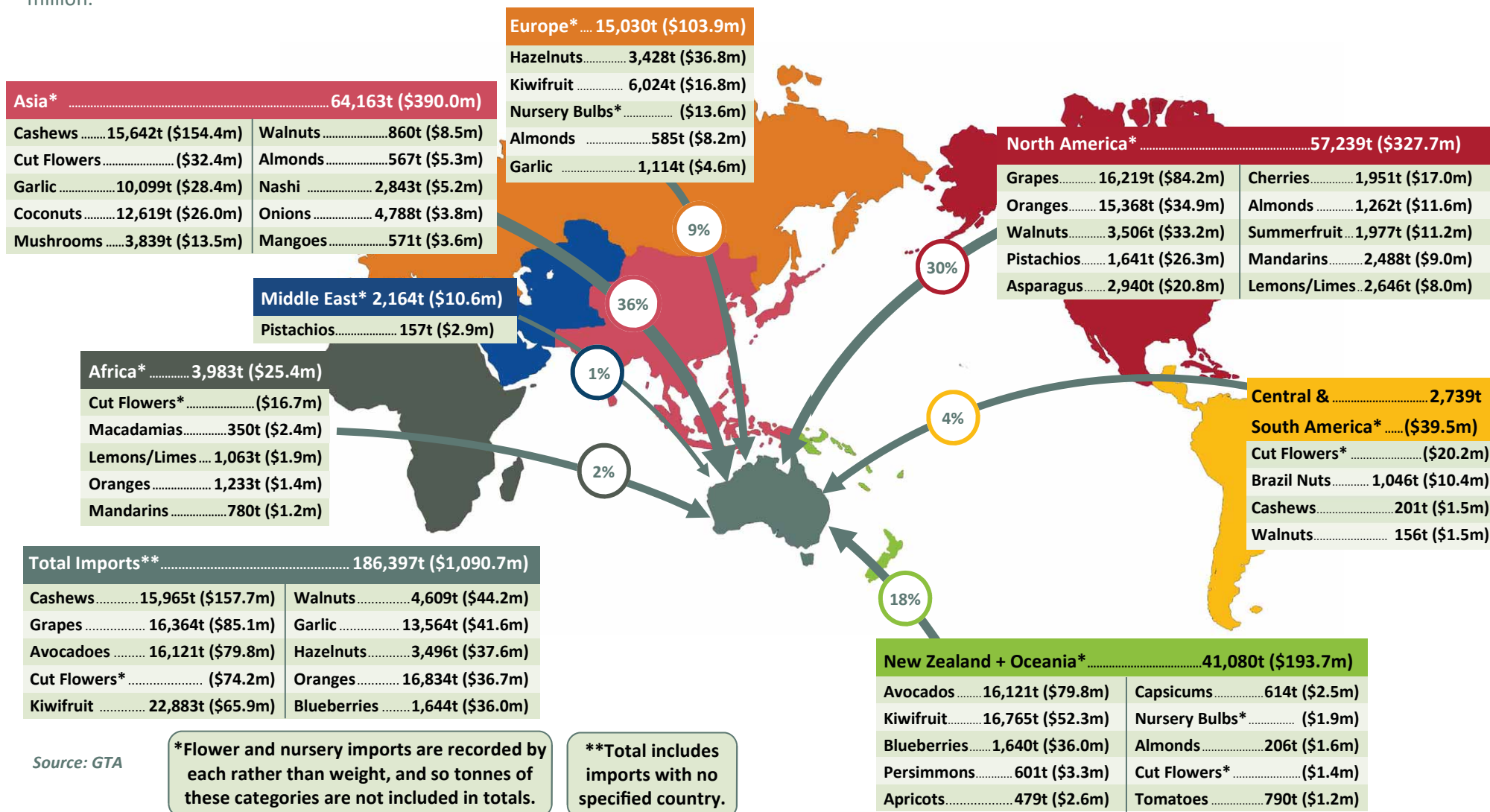
Sources: GTA; (Freshlogic Analysis)

<b>Fresh Fruit</b> .....	<b>\$1,475.3m</b>	<b>Other Fresh Horticulture</b> .....	<b>\$14.3m</b>
Table Grapes .....	\$622.9m	Cut Flowers .....	\$8.4m
Oranges .....	\$310.1m	Live Plants .....	\$5.9m
Mandarins .....	\$187.2m	Bulbs .....	\$0.1m
<b>Fresh Vegetables</b> .....	<b>\$275.9m</b>	<b>Processed Fruit</b> .....	<b>\$188.1m</b>
Carrots .....	\$91.1m	Dried Grapes and Grape Juice .....	\$46.6m
Potatoes .....	\$33.6m	Olives and Olive Oil .....	\$19.3m
Onions .....	\$30.2m	Orange Juice .....	\$7.0m
<b>Nuts</b> .....	<b>\$942.5m</b>	<b>Processed Vegetables</b> .....	<b>\$95.3m</b>
Almonds .....	\$647.6m	Potatoes .....	\$22.9m
Macadamias .....	\$233.9m	Tomatoes .....	\$22.8m
Walnuts .....	\$14.6m	Ginger .....	\$4.4m



## Imports of fresh horticultural products by region

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



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



## Exports of fresh horticultural products by region

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

<b>Asia*</b> ..... 607,343t (\$2,082.1)	
Grapes..... 141,948t (\$586.1m)	Cherries ..... 4,039t (\$76.5m)
Almonds..... 51,572t (\$445.9m)	Summerfruit 15,679t (\$67.0m)
Oranges..... 171,312t (\$268.7m)	Carrots..... 36,451t (\$33.3m)
Macadamias.. 16,441t (\$165.6m)	Potatoes..... 36,437t (\$28.6m)
Mandarins..... 59,108t (\$151.4m)	Asparagus ..... 3,059t (\$24.8m)

<b>Middle East*</b> ..... 121,643t (\$199.9m)	
Carrots..... 64,862t (\$55.1m)	Mandarins ..... 6,857t (\$12.0m)
Grapes..... 6,044t (\$20.9m)	Mangoes ..... 2,356t (\$11.1m)
Oranges..... 16,144t (\$17.8m)	Watermelons... 4,142t (\$9.0m)
Summerfruit... 4,527t (\$16.8m)	Strawberries... 1,063t (\$7.9m)
Almonds ..... 1,467t (\$13.3m)	Macadamias..... 258t (\$7.6m)

<b>Africa*</b> ..... 1,970t (\$8.5m)
Almonds..... 628t (\$5.4m)

<b>Total Exports**</b> ..... 826,093t (\$2,707.9m)	
Almonds..... 74,299t (\$647.6m)	Carrots ..... 103,868t (\$91.1m)
Grapes..... 152,180t (\$622.9m)	Summerfruit... 21,269t (\$89.1m)
Oranges..... 201,268t (\$310.1m)	Cherries ..... 4,460t (\$81.7m)
Macadamias... 18,828t (\$233.9m)	Mangoes..... 7,707t (\$33.7m)
Mandarins ..... 77,136t (\$187.2m)	Potatoes..... 40,249t (\$33.6m)

Source: GTA

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

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

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

<b>Europe*</b> ..... 34,721t (\$202.1m)	
Almonds ..... 14,893t (\$135.7m)	Live Plants* ..... (\$2.2m)
Macadamias ..... 1,083t (\$32.8m)	Cut Flowers* ..... (\$2.1m)
Onions ..... 13,867t (\$10.8m)	Apples..... 650t (\$1.6m)
Walnuts ..... 2,184t (\$10.4m)	
Mushrooms ..... 3t (\$2.3m)	

<b>North America*</b> ..... 21,424t (\$90.1m)	
Macadamias. 922t (\$25.4m)	Pears ..... 1,385t (\$2.3m)
Almonds ..... 3,049t (\$17.5m)	Mangoes..... 338t (\$1.8m)
Mandarins.. 6,058t (\$13.8m)	Cherries ..... 91t (\$1.6m)
Oranges..... 7,264t (\$13.8m)	Cut Flowers* ..... (\$1.5m)
Summerfruit... 812t (\$4.1m)	Pecans ..... 141t (\$1.3m)

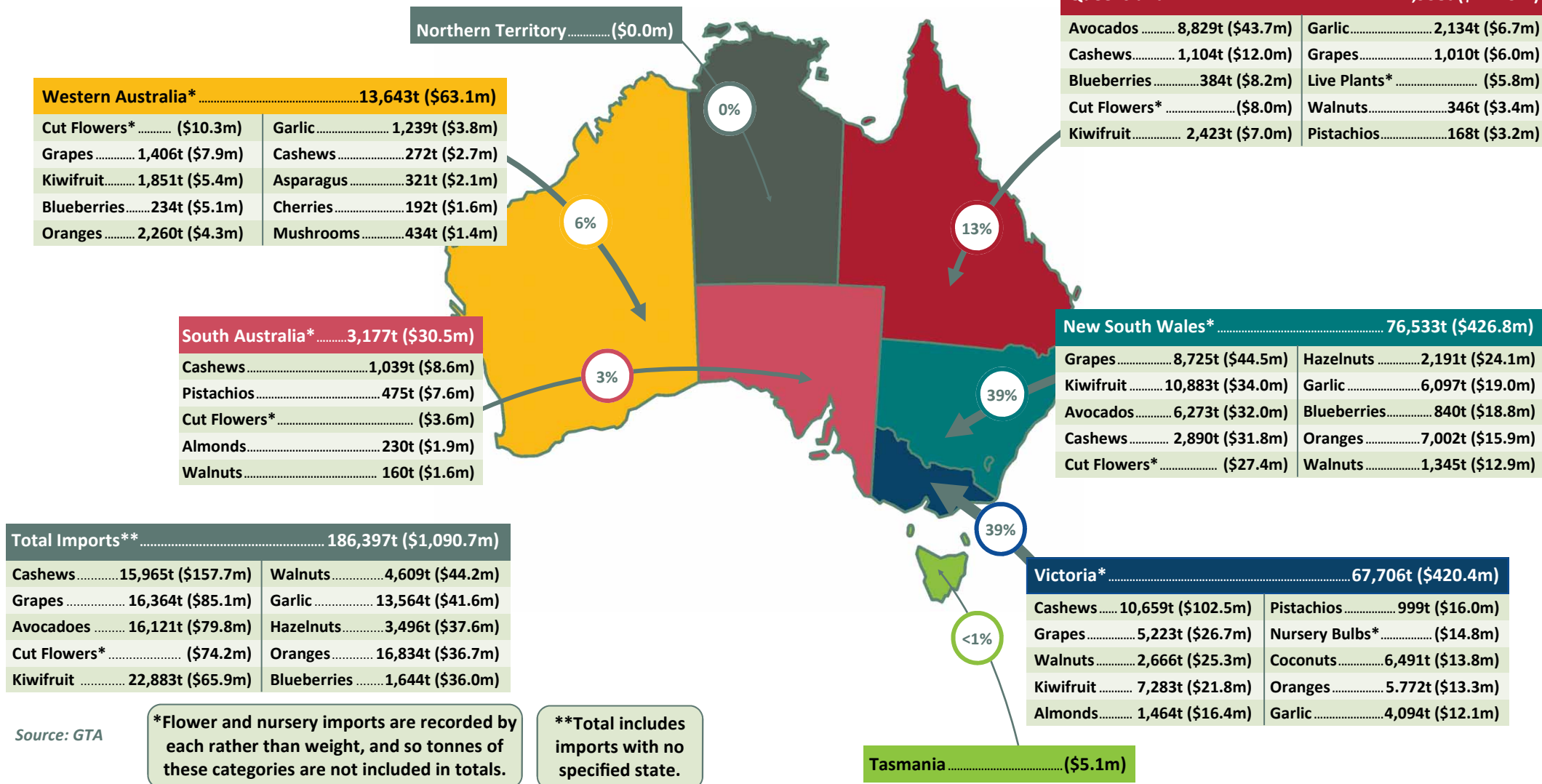
<b>New Zealand + Oceania*</b> ..... 38,309t (\$122.5m)	
Almonds..... 2,420t (\$27.5m)	Pears..... 4,507t (\$6.7m)
Grapes ..... 4,154t (\$15.6m)	Strawberries..... 684t (\$4.7m)
Mandarins ..... 5,047t (\$9.6m)	Mangoes..... 1,308t (\$4.5m)
Oranges ..... 6,212t (\$9.0m)	Muskmelons .... 2,521t (\$4.4m)
Beans..... 1,535t (\$7.9m)	Watermelons.... 2,427t (\$3.4m)





## Imports of fresh horticultural products by state

These pages profile total imports of **fresh** horticultural products by Australian state or territory. The total imports of fresh products is profiled for each state. And the text box at the bottom left of the page depicts the top 10 products by **value**, for products where imports exceed \$1million.



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



## Exports of fresh horticultural products by state

These pages profile total exports of **fresh** horticultural products by Australian state or territory of production. The total exports of fresh products is profiled for each state. And the text box at the bottom left of the page depicts the top 10 products **by value**, for products where exports exceed \$1million.

<b>Northern Territory</b> 1,400t (\$6.1m)
Mangoes.....1,089t (\$5.4m)

### Western Australia\* 126,800t (\$174.1m)

Carrots..... 94,082t (\$80.5m)	Muskmelons.....3,845t (\$5.7m)
Strawberries 3,576t (\$26.5m)	Onions.....5,985t (\$5.5m)
Grapes..... 1,169t (\$10.3m)	Oranges.....3,274t (\$5.4m)
Avocados..... 1,370t (\$8.4m)	Mushrooms.....7t (\$4.7m)
Potatoes.....5,459t (\$6.7m)	Celery.....3,095t (\$4.1m)

### South Australia\* 136,544t (\$349.7m)

Almonds.....19,399t (\$180.9m)	Lemons/Limes.....1,237t (\$2.4m)
Oranges.....65,355t (\$101.4m)	Grapes.....415t (\$2.0m)
Mandarins.....15,156t (\$27.8m)	Cherries.....77t (\$1.8m)
Potatoes.....23,701t (\$18.8m)	Grapefruit.....1,003t (\$1.7m)
Onions.....8,635t (\$8.3m)	

### Total Exports\*\* 826,093t (\$2,707.9m)

Almonds..... 74,299t (\$647.6m)	Carrots..... 103,868t (\$91.1m)
Grapes..... 152,180t (\$622.9m)	Summerfruit...21,269t (\$89.1m)
Oranges..... 201,268t (\$310.1m)	Cherries..... 4,460t (\$81.7m)
Macadamias...18,828t (\$233.9m)	Mangoes..... 7,707t (\$33.7m)
Mandarins.....77,136t (\$187.2m)	Potatoes.....40,249t (\$33.6m)

Source: GTA

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

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



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

### Queensland\* 97,288t (\$334.8m)

Mandarins.....50,822t (\$135.3m)	Beans.....1,585t (\$8.3m)
Macadamias.....6,900t (\$70.2m)	Watermelons.....4,571t (\$7.5m)
Mangoes.....5,111t (\$20.9m)	Broccoli/Caulif.....2,481t (\$7.5m)
Muskmelons.....7,945t (\$14.3m)	Strawberries.....616t (\$4.2m)
Avocados.....1,599t (\$10.2m)	Cut Flowers*.....(\$3.0m)

### New South Wales\* 90,738t (\$380.6m)

Macadamias 11,860t (\$162.9m)	Almonds.....1,462t (\$12.0m)
Oranges.....34,155t (\$52.5m)	Pecans.....1,204t (\$11.9m)
Grapes.....12,387t (\$45.3m)	Potatoes.....10,498t (\$6.8m)
Walnuts.....2,988t (\$14.1m)	Mangoes.....1,177t (\$5.9m)
Cherries.....950t (\$13.4m)	Muskmelons.....2,628t (\$5.2m)

### Victoria\* 345,107t (\$1,400.7m)

Grapes.....137,666t (\$562.3m)	Asparagus.....3,046t (\$24.7m)
Almonds.....53,338t (\$453.7m)	Mandarins.....9,285t (\$18.9m)
Oranges.....96,869t (\$148.2m)	Pears.....9,361t (\$15.3m)
Summerfruit 18,200t (\$76.8m)	Broccoli/Caulif....1,918t (\$8.4m)
Cherries.....1,682t (\$28.8m)	Cut Leaf Salad.....932t (\$6.9m)

### Tasmania\* 27,836t (\$59.1m)

Cherries.....1,731t (\$37.4m)
Onions.....20,438t (\$14.2m)
Carrots.....5,109t (\$4.7m)



## 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 2020.

Year Ending June 2020	Production (t)	Year Ending June 2020	Production (t)
All Horticultural Products	6,528,078	Passionfruit	4,783
<b>All Fruit</b>	<b>2,574,347</b>	Papaya/Pawpaw	19,648
Apples	301,792	Persimmons	2,771
Avocados	87,546	Pears	118,545
Bananas	381,676	Pineapples	66,069
Berries - Combined	113,025	Summerfruit - Combined	137,716
Blueberries	20,783	Apricots	7,275
Rubus Berries	9,932	Nectarines/Peaches	103,094
Strawberries	82,310	Plums	27,347
Cherries	14,720	Table Grapes	214,660
Citrus - Combined	767,766	Processing Fruit Combined*	125,993
Grapefruit	12,055	Dried Grapes	13,250
Lemons/Limes	71,432	Prunes*	8,773
Mandarins	172,934	Other Dried Tree Fruit*	2,156
Oranges	511,345	Canned Fruit*	51,814
Custard Apples	1,422	Olives	50,000
Kiwifruit	8,202	Other Fruit	5,399
Lychees	2,434	<b>All Vegetables</b>	<b>3,723,506</b>
Mangoes	72,022	Artichokes	452
Melons - Combined	190,024	Asparagus	8,279
Muskmelons	58,136	Beans	32,759
Watermelons	131,889	Beetroot	15,253
Nashi	877	Broccoli/Baby Broccoli	76,631

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 2020	Production (t)	Year Ending June 2020	Production (t)
Brussels Sprouts	5,609	Potatoes	1,388,859
Cabbage	78,918	Pumpkins	116,071
Capsicums	71,718	Sweet Corn	73,212
Carrots	330,145	Sweetpotatoes	106,715
Cauliflower	73,980	Tomatoes	460,789
Celery	61,531	Zucchini	44,078
Chillies	2,092	Other Vegetables	26,415
Cucumbers	95,723	<b>All Nuts</b>	<b>230,225</b>
Eggplant	10,557	Almonds (Inshell)**	158,714
Eng.Spinach/Silverbeet/Kale	7,080	Chestnuts (Inshell)	1,250
Fresh Herbs - Combined	13,340	Hazelnuts (Inshell)**	1,000
Fennel	1,345	Macadamias (Inshell)	45,200
Parsley and Other Herbs	11,995	Pecans (Inshell)	3,732
Garlic	2,925	Pistachios (Inshell)	2,900
Ginger	6,004	Walnuts (Inshell)	12,800
Leafy Asian Vegetables	31,897	Other Nuts (Inshell)	4,629
Leafy Salad Vegetables	69,321	<b>Other Horticulture</b>	<b>N/A</b>
Leeks	11,519	Cut Flowers	N/A
Head Lettuce	135,119	Nursery*	N/A
Mushrooms	68,823	Turf	N/A
Onions	265,162		
Parsnips	3,425		
Peas	29,104		

*\*\*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 2020.

Year Ending June 2020	Production (\$m)	Year Ending June 2020	Production (\$m)
All Horticultural Products	\$15,060.7	Passionfruit	\$23.6
<b>All Fruit</b>	<b>\$5,695.4</b>	Papaya/Pawpaw	\$31.8
Apples	\$578.7	Persimmons	\$11.0
Avocados	\$450.0	Pears	\$130.0
Bananas	\$596.2	Pineapples	\$52.2
Berries - Combined	\$1,040.6	Summerfruit - Combined	\$413.9
Blueberries	\$389.6	Apricots	\$29.4
Rubus Berries	\$216.0	Nectarines/Peaches	\$310.1
Strawberries	\$435.0	Plums	\$74.4
Cherries	\$184.0	Table Grapes	\$750.4
Citrus - Combined	\$942.4	Processing Fruit Combined*	\$116.0
Grapefruit	\$18.4	Dried Grapes	\$29.1
Lemons/Limes	\$152.3	Prunes*	\$5.8
Mandarins	\$357.0	Other Dried Tree Fruit*	\$0.7
Oranges	\$414.7	Canned Fruit*	\$18.4
Custard Apples	\$5.9	Olives	\$62.0
Kiwifruit	\$26.7	Other Fruit	<\$0.1
Lychees	\$31.9	<b>All Vegetables</b>	<b>\$4,851.3</b>
Mangoes	\$185.2	Artichokes	\$1.0
Melons - Combined	\$152.1	Asparagus	\$86.7
Muskmelons	\$68.4	Beans	\$104.0
Watermelons	\$83.7	Beetroot	\$12.2
Nashi	\$3.1	Broccoli/Baby Broccoli	\$288.0

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 2020	Production (\$m)	Year Ending June 2020	Production (\$m)
Brussels Sprouts	\$20.9	Potatoes	\$716.4
Cabbage	\$59.5	Pumpkins	\$107.5
Capsicums	\$212.9	Sweet Corn	\$113.8
Carrots	\$222.1	Sweetpotatoes	\$83.0
Cauliflower	\$65.6	Tomatoes	\$584.4
Celery	\$74.1	Zucchini	\$86.6
Chillies	\$8.5	Other Vegetables	\$105.5
Cucumbers	\$174.1	<b>All Nuts</b>	<b>\$1,377.7</b>
Eggplant	\$21.1	Almonds	\$954.0
Eng.Spinach/Silverbeet/Kale	\$19.9	Chestnuts	\$9.1
Fresh Herbs - Combined	\$231.3	Hazelnuts	\$3.7
Fennel	\$2.7	Macadamias	\$245.1
Parsley and Other Herbs	\$228.7	Pecans	\$29.7
Garlic	\$21.6	Pistachios	\$35.8
Ginger	\$28.3	Walnuts	\$55.0
Leafy Asian Vegetables	\$77.2	Other Nuts	\$45.3
Leafy Salad Vegetables	\$407.5	<b>Other Horticulture</b>	<b>\$3,136.2</b>
Leeks	\$28.4	Cut Flowers	\$293.0
Head Lettuce	\$206.2	<i>Nursery*</i>	<i>\$2,563.0</i>
Mushrooms	\$367.8	Turf	\$280.2
Onions	\$243.9		
Parsnips	\$12.1		
Peas	\$59.2		

*\*Note: The nursery production value has been reported for indication only. This value has been provided outside of THRUchain methodology and is based directly on project output from NY17008. See pages 474 to 479.*





## 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 2020.

Year Ending June 2020	Fresh Export Volume (t)	Year Ending June 2020	Fresh Export Volume (t)
All Horticultural Products	826,093	Passionfruit	
<b>All Fruit</b>	<b>515,435</b>	Papaya/Pawpaw	10
Apples	2,953	Persimmons	140
Avocados	4,051	Pears	9,732
Bananas		Pineapples	
Berries - Combined	5,084	Summerfruit - Combined	21,269
Blueberries	393	Apricots	885
Rubus Berries	13	Nectarines/Peaches	15,170
Strawberries	4,678	Plums	5,214
Cherries	4,460	Table Grapes	152,180
Citrus - Combined	284,667	Processing Fruit Combined*	
Grapefruit	1,706	Dried Grapes*	
Lemons/Limes	4,206	Prunes*	
Mandarins	77,316	Other Dried Tree Fruit*	
Oranges	201,268	Canned Fruit*	
Custard Apples	71	Olives*	
Kiwifruit	605	Other Fruit	303
Lychees	431	<b>All Vegetables</b>	<b>210,824</b>
Mangoes	7,707	Artichokes	9
Melons - Combined	21,772	Asparagus	3,068
Muskmelons	14,887	Beans	1,633
Watermelons	6,885	Beetroot	375
Nashi		Broccoli/Baby Broccoli	5,169

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2020	Fresh Export Volume (t)	Year Ending June 2020	Fresh Export Volume (t)
Brussels Sprouts	263	Potatoes	40,249
Cabbage	1,294	Pumpkins	3,256
Capsicums	506	Sweet Corn	
Carrots	103,868	Sweetpotatoes	2,371
Cauliflower	705	Tomatoes	658
Celery	5,132	Zucchini	
Chillies	5	Other Vegetables	3,467
Cucumbers	81	<b>All Nuts*</b>	<b>99,835</b>
Eggplant	7	Almonds*	74,299
Eng.Spinach/Silverbeet/Kale	256	Chestnuts*	7
Fresh Herbs - Combined		Hazelnuts*	6
Fennel		Macadamias*	18,828
Parsley and Other Herbs		Pecans*	1,371
Garlic		Pistachios*	597
Ginger	25	Walnuts*	3,036
Leafy Asian Vegetables		Other Nuts*	1,692
Leafy Salad Vegetables	1,345	<b>Other Horticulture</b>	<b>N/A</b>
Leeks	98	Cut Flowers	N/A
Head Lettuce	427	<i>Nursery*</i>	<i>N/A</i>
Mushrooms	72	Turf	N/A
Onions	36,480		
Parsnips			
Peas	6		

*\*Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.*



## 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 2020.

Year Ending June 2020	Fresh Export Value (\$m)	Year Ending June 2020	Fresh Export Value (\$m)
All Horticultural Products	\$2,707.9	Passionfruit	
<b>All Fruit</b>	<b>\$1,475.3</b>	Papaya/Pawpaw	<\$0.1
Apples	\$7.6	Persimmons	\$1.0
Avocados	\$25.0	Pears	\$16.1
Bananas		Pineapples	
Berries - Combined	\$42.0	Summerfruit - Combined	\$89.1
Blueberries	\$8.4	Apricots	\$4.1
Rubus Berries	\$0.2	Nectarines/Peaches	\$64.4
Strawberries	\$33.4	Plums	\$20.6
Cherries	\$81.7	Table Grapes	\$622.9
Citrus - Combined	\$508.5	Processing Fruit Combined*	
Grapefruit	\$2.7	Dried Grapes*	
Lemons/Limes	\$7.9	Prunes*	
Mandarins	\$187.2	Other Dried Tree Fruit*	
Oranges	\$310.1	Canned Fruit*	
Custard Apples	\$0.4	Olives*	
Kiwifruit	\$3.0	Other Fruit	<\$0.1
Lychees	\$6.9	<b>All Vegetables</b>	<b>\$275.9</b>
Mangoes	\$33.7	Artichokes	<\$0.1
Melons - Combined	\$39.3	Asparagus	\$24.9
Muskmelons	\$26.2	Beans	\$8.7
Watermelons	\$13.1	Beetroot	\$1.3
Nashi		Broccoli/Baby Broccoli	\$19.7

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2020	Fresh Export Value (\$m)	Year Ending June 2020	Fresh Export Value (\$m)
Brussels Sprouts	\$1.6	Potatoes	\$33.6
Cabbage	\$2.7	Pumpkins	\$5.8
Capsicums	\$2.2	Sweet Corn	
Carrots	\$91.1	Sweetpotatoes	\$3.7
Cauliflower	\$2.2	Tomatoes	\$2.9
Celery	\$8.8	Zucchini	
Chillies	<\$0.1	Other Vegetables	\$15.1
Cucumbers	\$0.4	<b>All Nuts*</b>	<b>\$942.5</b>
Eggplant	<\$0.1	Almonds*	\$647.6
Eng.Spinach/Silverbeet/Kale	\$2.5	Chestnuts*	<\$0.1
Fresh Herbs - Combined		Hazelnuts*	<\$0.1
Fennel		Macadamias*	\$233.9
Parsley and Other Herbs		Pecans*	\$13.4
Garlic		Pistachios*	\$7.6
Ginger	\$0.3	Walnuts*	\$14.6
Leafy Asian Vegetables		Other Nuts*	\$25.3
Leafy Salad Vegetables	\$9.9	<b>Other Horticulture</b>	<b>\$14.3</b>
Leeks	\$0.4	Cut Flowers	\$8.4
Head Lettuce	\$1.3	Nursery*	\$5.9
Mushrooms	\$6.3	Turf	
Onions	\$30.2		
Parsnips			
Peas	<\$0.1		

\*Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.



## 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 2020.

Year Ending June 2020	Fresh Import Volume (t)
All Horticultural Products	186,397
<b>All Fruit</b>	<b>108,263</b>
Apples	786
Avocados	16,121
Bananas	
Berries - Combined	1,648
Blueberries	1,644
Rubus Berries	
Strawberries	4
Cherries	1,954
Citrus - Combined	25,122
Grapefruit	1,022
Lemons/Limes	3,902
Mandarins	3,360
Oranges	16,834
Custard Apples	
Kiwifruit	22,883
Lychees	
Mangoes	838
Melons - Combined	155
Muskmelons	
Watermelons	155
Nashi	2,843

Year Ending June 2020	Fresh Import Volume (t)
Passionfruit	
Papaya/Pawpaw	86
Persimmons	602
Pears	
Pineapples	
Summerfruit - Combined	2,549
Apricots	484
Nectarines/Peaches	1,717
Plums	348
Table Grapes	16,364
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	16,318
<b>All Vegetables</b>	<b>32,845</b>
Artichokes	1
Asparagus	3,068
Beans	559
Beetroot	8
Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2020	Fresh Import Volume (t)
Brussels Sprouts	
Cabbage	
Capsicums	695
Carrots	
Cauliflower	
Celery	
Chillies	7
Cucumbers	
Eggplant	
Eng.Spinach/Silverbeet/Kale	
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	13,564
Ginger	204
Leafy Asian Vegetables	
Leafy Salad Vegetables	23
Leeks	
Head Lettuce	3
Mushrooms	3,874
Onions	6,298
Parsnips	
Peas	764

Year Ending June 2020	Fresh Import Volume (t)
Potatoes	
Pumpkins	13
Sweet Corn	
Sweetpotatoes	795
Tomatoes	790
Zucchini	
Other Vegetables	2,180
<b>All Nuts*</b>	<b>45,288</b>
Almonds*	2,624
Chestnuts*	66
Hazelnuts*	3,496
Macadamias*	570
Pecans*	
Pistachios*	1,955
Walnuts*	4,609
Other Nuts*	31,969
<b>Other Horticulture</b>	<b>N/A</b>
Cut Flowers	N/A
<i>Nursery*</i>	<i>N/A</i>
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 426 to 460.*



## 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 2020.

Year Ending June 2020	Fresh Import Value (\$m)	Year Ending June 2020	Fresh Import Value (\$m)
All Horticultural Products	\$1,090.7	Passionfruit	
<b>All Fruit</b>	<b>\$415.9</b>	Papaya/Pawpaw	\$0.4
Apples	\$1.9	Persimmons	\$3.3
Avocados	\$79.8	Pears	
Bananas		Pineapples	
Berries - Combined	\$36.0	Summerfruit - Combined	\$14.1
Blueberries	\$36.0	Apricots	\$2.6
Rubus Berries		Nectarines/Peaches	\$9.5
Strawberries	<\$0.1	Plums	\$1.9
Cherries	\$17.1	Table Grapes	\$85.1
Citrus - Combined	\$60.0	Processing Fruit Combined*	
Grapefruit	\$2.4	Dried Grapes*	
Lemons/Limes	\$10.3	Prunes*	
Mandarins	\$10.5	Other Dried Tree Fruit*	
Oranges	\$36.7	Canned Fruit*	
Custard Apples		Olives*	
Kiwifruit	\$69.5	Other Fruit	\$38.7
Lychees		<b>All Vegetables</b>	<b>\$100.2</b>
Mangoes	\$4.9	Artichokes	<\$0.1
Melons - Combined	\$0.2	Asparagus	\$21.6
Muskmelons		Beans	\$0.7
Watermelons	\$0.2	Beetroot	<\$0.1
Nashi	\$5.2	Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2020	Fresh Import Value (\$m)	Year Ending June 2020	Fresh Import Value (\$m)
Brussels Sprouts		Potatoes	
Cabbage		Pumpkins	<\$0.1
Capsicums	\$2.7	Sweet Corn	
Carrots		Sweetpotatoes	\$0.9
Cauliflower		Tomatoes	\$1.2
Celery		Zucchini	
Chillies	\$0.1	Other Vegetables	\$8.6
Cucumbers		<b>All Nuts*</b>	<b>\$462.6</b>
Eggplant		Almonds*	\$26.7
Eng.Spinach/Silverbeet/Kale	<\$0.1	Chestnuts*	\$1.5
Fresh Herbs - Combined		Hazelnuts*	\$37.6
Fennel		Macadamias*	\$2.7
Parsley and Other Herbs		Pecans*	
Garlic	\$41.6	Pistachios*	\$33.1
Ginger	\$1.1	Walnuts*	\$44.2
Leafy Asian Vegetables		Other Nuts*	\$316.9
Leafy Salad Vegetables	\$0.1	<b>Other Horticulture</b>	<b>\$112.0</b>
Leeks		Cut Flowers	\$74.2
Head Lettuce	<\$0.1	Nursery*	\$37.8
Mushrooms	\$13.8	Turf	
Onions	\$5.7		
Parsnips			
Peas	\$2.0		

\*Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.





## 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 2020.

Year Ending June 2020	Fresh Supply (t)	Year Ending June 2020	Fresh Supply (t)
All Horticultural Products	4,034,166	Passionfruit	4,338
<b>All Fruit</b>	<b>1,673,661</b>	Papaya/Pawpaw	19,452
Apples	213,398	Persimmons	3,228
Avocados	94,245	Pears	62,337
Bananas	380,534	Pineapples	42,352
Berries - Combined	97,497	Summerfruit - Combined	92,447
Blueberries	20,231	Apricots	5,599
Rubus Berries	9,100	Nectarines/Peaches	72,320
Strawberries	68,166	Plums	14,528
Cherries	11,124	Table Grapes	78,843
Citrus - Combined	301,866	Processing Fruit Combined*	
Grapefruit	10,863	Dried Grapes*	
Lemons/Limes	64,205	Prunes*	
Mandarins	95,587	Other Dried Tree Fruit*	
Oranges	131,211	Canned Fruit*	
Custard Apples	1,351	Olives*	
Kiwifruit	30,480	Other Fruit	6,760
Lychees	2,003	<b>All Vegetables</b>	<b>2,242,095</b>
Mangoes	61,724	Artichokes	445
Melons - Combined	165,961	Asparagus	8,279
Muskmelons	42,109	Beans	31,685
Watermelons	123,852	Beetroot	5,707
Nashi	3,720	Broccoli/Baby Broccoli	67,748

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 2020	Fresh Supply (t)	Year Ending June 2020	Fresh Supply (t)
Brussels Sprouts	4,354	Potatoes	443,674
Cabbage	65,586	Pumpkins	109,228
Capsicums	67,689	Sweet Corn	32,969
Carrots	205,982	Sweetpotatoes	95,881
Cauliflower	67,166	Tomatoes	250,444
Celery	55,491	Zucchini	43,299
Chillies	1,611	Other Vegetables	24,523
Cucumbers	90,652	<b>All Nuts</b>	<b>118,411</b>
Eggplant	9,873	Almonds	57,137
Eng.Spinach/Silverbeet/Kale	6,306	Chestnuts	1,302
Fresh Herbs - Combined	12,839	Hazelnuts	4,262
Fennel	1,306	Macadamias	4,838
Parsley and Other Herbs	11,533	Pecans	1,389
Garlic	10,571	Pistachios	5,776
Ginger	3,185	Walnuts	10,058
Leafy Asian Vegetables	31,897	Other Nuts	33,648
Leafy Salad Vegetables	56,205	<b>Other Horticulture</b>	<b>N/A</b>
Leeks	11,422	Cut Flowers	N/A
Head Lettuce	134,694	<i>Nursery*</i>	<i>N/A</i>
Mushrooms	70,880	Turf	N/A
Onions	211,975		
Parsnips	3,325		
Peas	6,507		

*\*\*Note: Nut supply volume includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 426 to 460.*



## 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 2020.

Year Ending June 2020	Wholesale Value (\$m)	Year Ending June 2020	Wholesale Value (\$m)
All Horticultural Products	\$15,415.8	Passionfruit	\$27.5
<b>All Fruit</b>	<b>\$5,406.4</b>	Papaya/Pawpaw	\$37.5
Apples	\$652.4	Persimmons	\$14.6
Avocados	\$540.0	Pears	\$128.3
Bananas	\$722.5	Pineapples	\$48.2
Berries - Combined	\$1,222.9	Summerfruit - Combined	\$394.8
Blueberries	\$497.4	Apricots	\$32.6
Rubus Berries	\$252.9	Nectarines/Peaches	\$301.2
Strawberries	\$472.6	Plums	\$61.0
Cherries	\$161.7	Table Grapes	\$328.1
Citrus - Combined	\$619.0	Processing Fruit Combined*	
Grapefruit	\$20.8	Dried Grapes*	
Lemons/Limes	\$180.6	Prunes*	
Mandarins	\$240.6	Other Dried Tree Fruit*	
Oranges	\$177.1	Canned Fruit*	
Custard Apples	\$6.5	Olives*	
Kiwifruit	\$114.1	Other Fruit	\$19.3
Lychees	\$30.6	<b>All Vegetables</b>	<b>\$5,203.8</b>
Mangoes	\$183.0	Artichokes	\$1.1
Melons - Combined	\$139.5	Asparagus	\$122.6
Muskmelons	\$54.1	Beans	\$115.7
Watermelons	\$85.4	Beetroot	\$11.4
Nashi	\$15.7	Broccoli/Baby Broccoli	\$317.9

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 2020	Wholesale Value (\$m)	Year Ending June 2020	Wholesale Value (\$m)
Brussels Sprouts	\$22.5	Potatoes	\$496.6
Cabbage	\$66.2	Pumpkins	\$120.4
Capsicums	\$249.5	Sweet Corn	\$120.9
Carrots	\$168.7	Sweetpotatoes	\$94.0
Cauliflower	\$74.4	Tomatoes	\$660.1
Celery	\$78.2	Zucchini	\$101.7
Chillies	\$9.7	Other Vegetables	\$83.3
Cucumbers	\$203.8	<b>All Nuts</b>	<b>\$1,454.3</b>
Eggplant	\$24.7	Almonds	\$561.2
Eng.Spinach/Silverbeet/Kale	\$20.7	Chestnuts	\$11.2
Fresh Herbs - Combined	\$271.2	Hazelnuts	\$46.6
Fennel	\$3.1	Macadamias	\$115.3
Parsley and Other Herbs	\$268.1	Pecans	\$17.7
Garlic	\$96.6	Pistachios	\$87.9
Ginger	\$30.7	Walnuts	\$104.4
Leafy Asian Vegetables	\$90.9	Other Nuts	\$510.1
Leafy Salad Vegetables	\$461.2	<b>Other Horticulture</b>	<b>\$3,351.2</b>
Leeks	\$32.9	Cut Flowers	\$385.3
Head Lettuce	\$241.3	<i>Nursery*</i>	<i>\$2,685.7</i>
Mushrooms	\$450.0	Turf	\$280.2
Onions	\$261.9		
Parsnips	\$14.2		
Peas	\$58.1		

*\*Note: The nursery wholesale value has been reported for indication only. This value has been provided outside of THRUchain methodology and is based directly on project output from NY17008. See pages 474 to 479.*



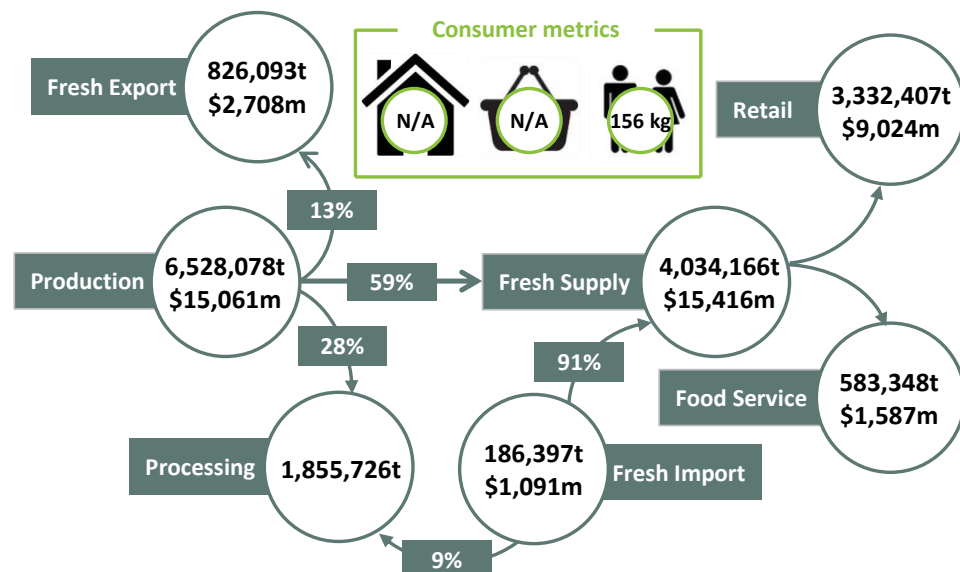
## All Fresh Horticulture Overview

Pages 52-55 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 2020:

- **6.53 million tonnes** of horticultural products (not including cut flowers, nursery and turf products) was produced in Australia and the value for all categories was **\$15.1 billion**.
- The wholesale value of the fresh supply was **\$15.4 billion** for all categories, with **\$9.0 billion** into retail and **\$1.6 billion** into food service (not including cut flowers, nursery, turf and nut products).
- The supply per capita was **156 kg**, based on the volume supplied.

### All Fresh Horticulture Supply Chain—Year Ending June 2020



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

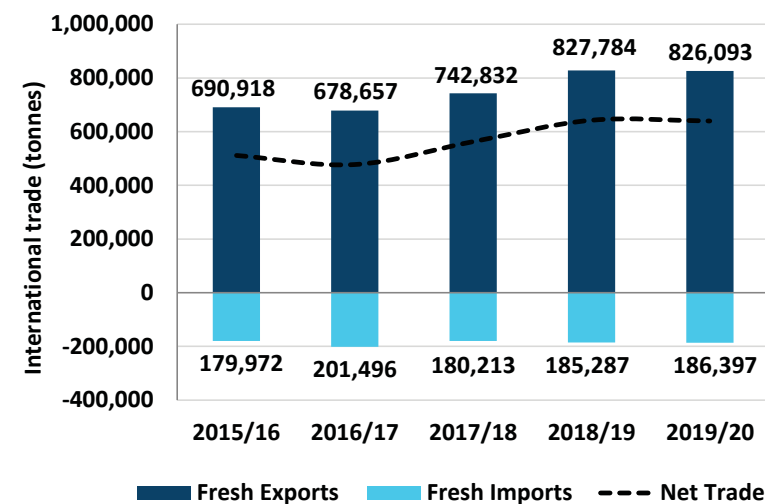


Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,506,062	6,624,791	+2%	6,528,078	-1%
Production (\$m)	\$13,244.0	\$14,391.0	+9%	\$15,060.7	+5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	742,832	827,784	+11%	826,093	>-1%
Fresh Export Value (\$m)	\$ 2,079.9	\$ 2,645.7	+27%	\$ 2,707.9	+2%
Fresh Import Volume (t)	180,213	185,287	+3%	186,397	<1%
Fresh Import Value (\$m)	\$ 995.6	\$ 1,064.9	+7%	\$ 1,090.7	+2%
Fresh Supply (t)	4,033,665	4,037,111	<1%	4,034,166	>-1%
Fresh Supply Wholesale Value (\$m)	\$13,518.8	\$14,433.5	+7%	\$15,415.8	+7%
Supply per Capita (kg)	161.78	160.17	>-1%	156.36	-2%
Retail Supply (t)	-	3,262,652	-	3,332,407	+2%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 8,455.6	-	\$ 9,023.6	+7%
Food Service Supply (t)	-	680,563	-	583,348	-14%
Food Service Wholesale Value (\$m)	\$ -	\$ 1,786.1	-	\$ 1,586.7	-11%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

### All Fresh Horticulture International Trade

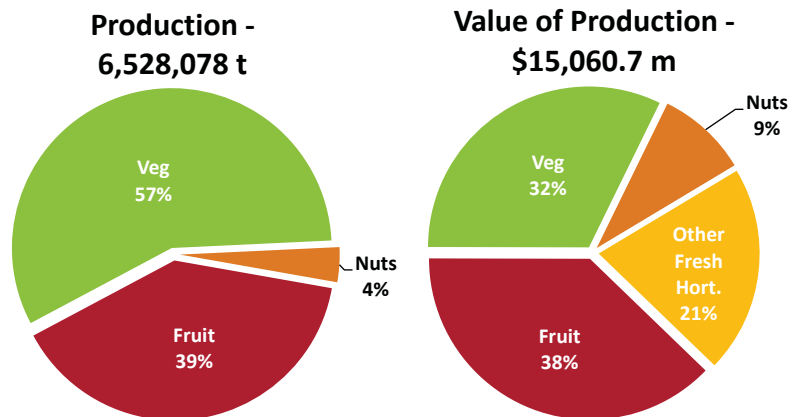


Source: GTA



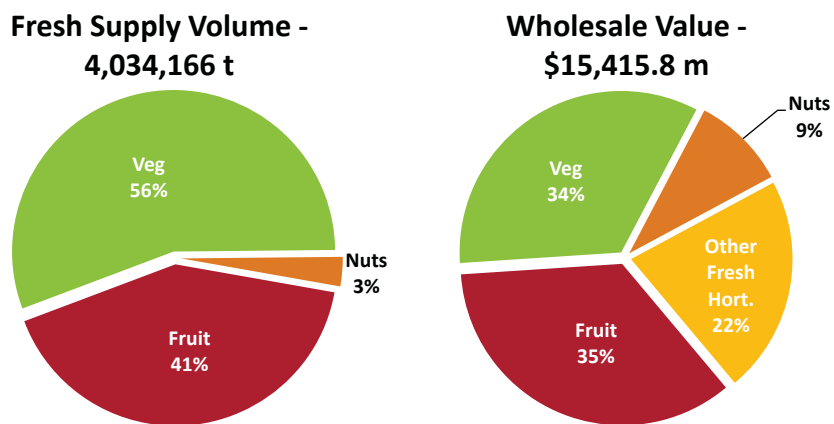
## Production

The charts below profile the share of total Australian production of all horticultural categories during the year ending June 2020. 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.



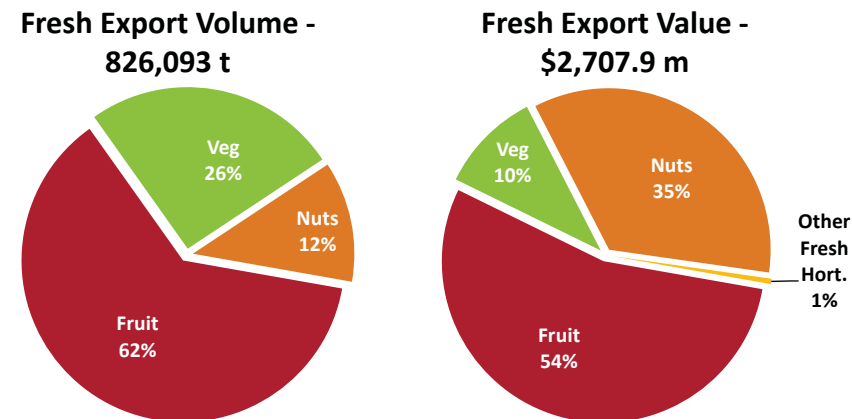
## Fresh supply

The charts below profile the share of the total fresh supply of all horticultural categories during the year ending June 2020.



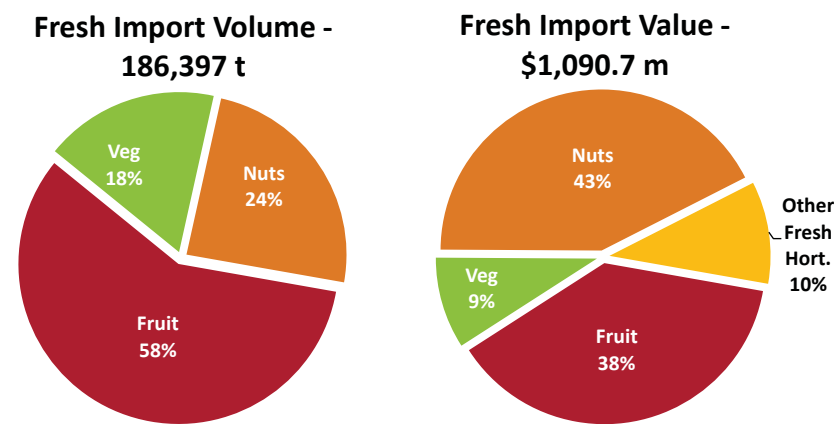
## Fresh exports

The charts below profile the share of total Australian fresh exports of all horticultural categories during the year ending June 2020.



## Fresh imports

The charts below profile the share of total Australian fresh imports of all horticultural categories during the year ending June 2020.





## All Fresh Fruit Overview

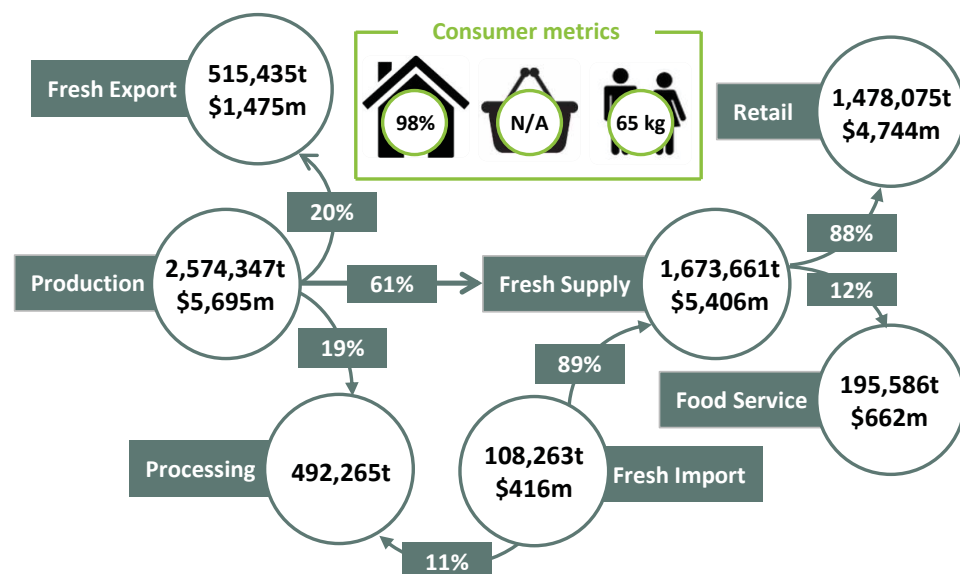
Pages 56-57 profile total fruit production and trade. It combines information on all fruit categories covered in this handbook.

For the year ending June 2020:

- **2.57 million tonnes** of fruit was produced in Australia valued at **\$5.7 billion**.
  - The wholesale value of the fresh supply was **\$5.41 billion** with **\$4,744 m** distributed into retail and **\$662 m** into food service.
  - **98%** of Australian households purchased fruit.
  - The supply per capita was **65 kg**, based on the volume supplied.
- \* 'Other Fruit' are included in the calculation of the category overview totals but have not been profiled separately.



## All Fresh Fruit Supply Chain—Year Ending June 2020



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



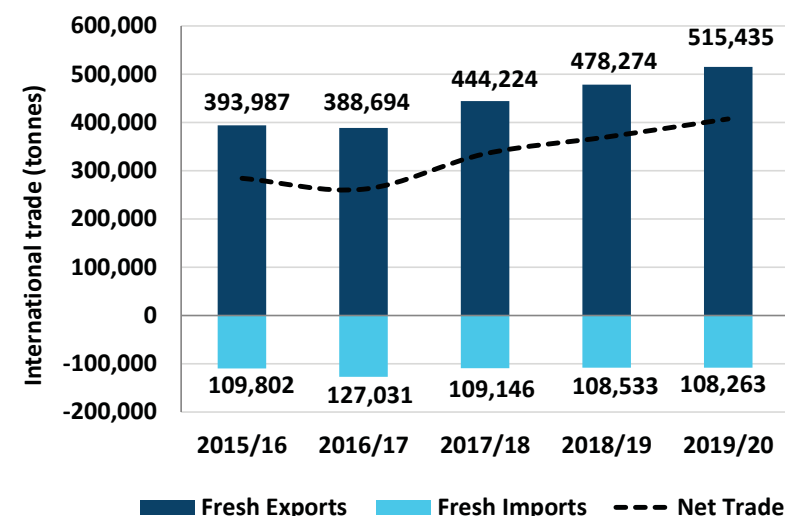
Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,620,215	2,685,451	+2%	2,574,347	-4%
Production (\$m)	\$ 5,075.5	\$ 5,544.9	+9%	\$ 5,695.4	+3%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	444,224	478,274	+8%	515,435	+8%
Fresh Export Value (\$m)	\$ 1,085.1	\$ 1,332.0	+23%	\$ 1,475.3	+11%
Fresh Import Volume (t)	109,146	108,533	>-1%	108,263	>-1%
Fresh Import Value (\$m)	\$ 374.1	\$ 392.2	+5%	\$ 415.9	+6%
Fresh Supply (t)	1,743,008	1,722,963	-1%	1,673,661	-3%
Fresh Supply Wholesale Value (\$m)	\$ 4,993.2	\$ 5,231.6	+5%	\$ 5,406.4	+3%
Supply per Capita (kg)	69.91	68.36	-2%	64.87	-5%
Retail Supply (t)	-	1,480,435	-	1,478,075	>-1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 4,491.7	-	\$ 4,744.1	+6%
Food Service Supply (t)	-	242,529	-	195,586	-19%
Food Service Wholesale Value (\$m)	\$ -	\$ 740.0	-	\$ 662.3	-10%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

## All Fresh Fruit International Trade

### Net All Fresh Fruit International Trade



Source: GTA





## Fresh Apple Overview

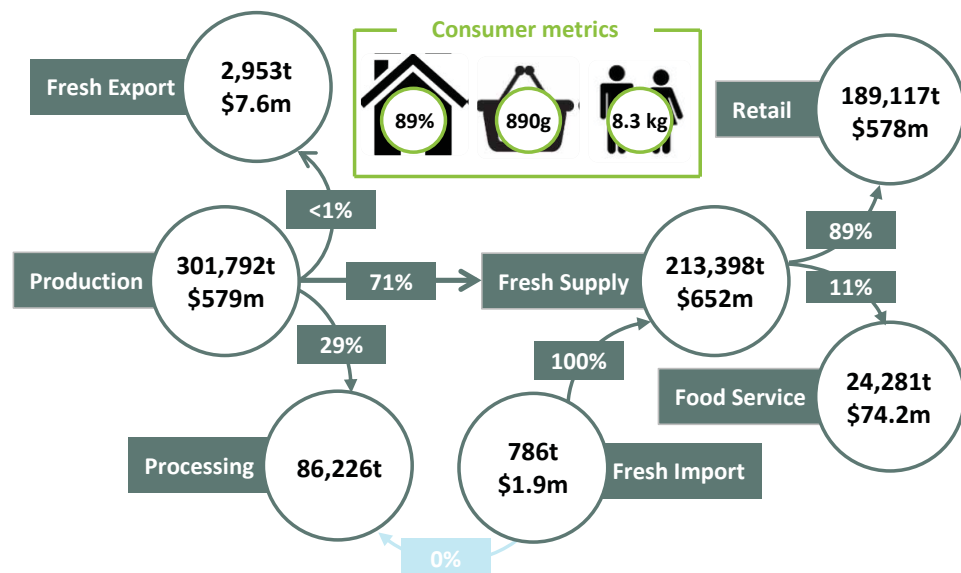
Apple production occurs across all states in Australia. Harvesting typically occurs between February and May. Year-round availability is made possible through the use of controlled atmosphere technology.

For the year ending June 2020:

- **301,792 t** produced and valued at **\$579 m** with **29%** sent to be processed.
- The wholesale value of the fresh supply was **\$652 m**, with **\$578 m** distributed into retail and **\$74.2 m** into food service.
- **89%** of Australian households purchased apples, buying an average of **890 g** per shopping trip.
- The supply per capita was **8.3 kg**, based on the volume supplied.



### Fresh Apple Supply Chain — Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	315,183	310,876	-1%	301,792	-3%
Production (\$m)	\$ 465.3	\$ 512.8	+10%	\$ 578.7	+13%
Producing Trees (000 Trees)	11,421	11,421	-	11,421	-
Fresh Export Volume (t)	5,058	4,416	-13%	2,953	-33%
Fresh Export Value (\$m)	\$ 11.3	\$ 10.6	-6%	\$ 7.6	-28%
Fresh Import Volume (t)	1,145	732	-36%	786	+7%
Fresh Import Value (\$m)	\$ 2.9	\$ 1.9	-35%	\$ 1.9	<1%
Fresh Supply (t)	219,115	213,712	-2%	213,398	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 519.5	\$ 572.6	+10%	\$ 652.4	+14%
Supply per Capita (kg)	8.79	8.48	-4%	8.27	-2%
Retail Supply (t)	-	185,032	-	189,117	+2%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 495.8	-	\$ 578.2	+17%
Food Service Supply (t)	-	28,680	-	24,281	-15%
Food Service Wholesale Value (\$m)	\$ -	\$ 76.8	-	\$ 74.2	-3%

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

## Major Apple Production Areas

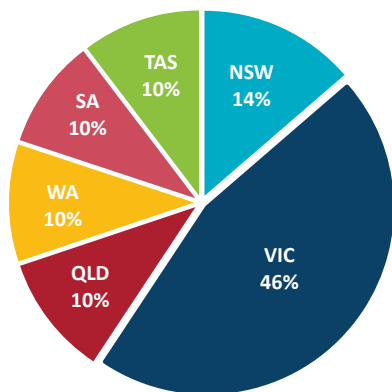


Source: APAL



## Apples

### 2019/20 Fresh Apple Production by State



Source: APAL

### Fresh Apple Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	41,222												
Victoria	137,762												
Queensland	31,827												
Western Australia	30,894												
South Australia	28,844												
Tasmania	31,243												
Imports	786												
Availability legend			High		Medium		Low						

Source: APAL

### Main Apple Varieties

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

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

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

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

## Apples



### Seasonality by Apple Variety

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

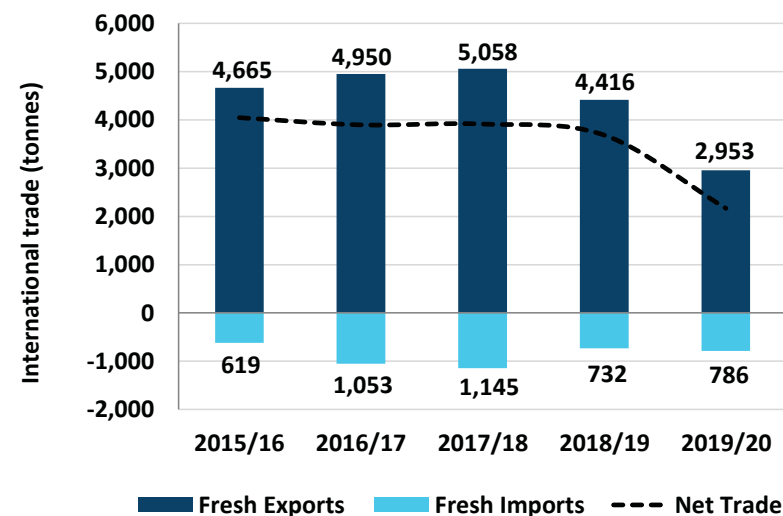
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	88,382												
Royal Gala	49,580												
Granny Smith	38,802												
Sundowner	2,156												
Other	36,646												
Processing	86,226												
Availability legend			High		Medium		Low						

Source: APAL

### Fresh Apple International Trade

Australia has traditionally been a net exporter of fresh apples, typically exporting between **2,000-5,000 tonnes** per year. For the year ending June 2020, Australia exported **2,953 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Apple International Trade



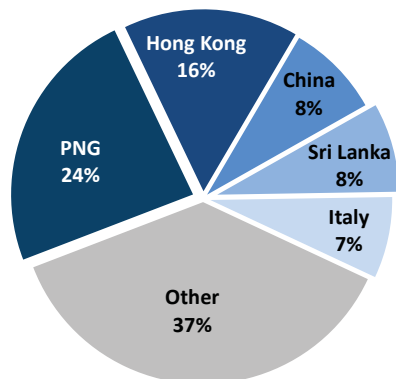
Source: GTA



## Apples

For the year ending June 2020, **24%** of exported fresh apples were sent to the PNG, as profiled in the chart below.

### 2019/20 Fresh Apple Exports by Country



Source: GTA

### Fresh Apple Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Victoria	813	509	492	Victoria	3,225	3,204	2,158
New South Wales	282	223	268	Tasmania	213	388	343
Western Australia	-	-	26	Queensland	995	635	304
Queensland	50	-	-	Western Australia	87	100	114
Other	< 0.5	-	0	New South Wales	106	30	29
TOTAL	1,145	732	786	Other	434	59	6
				TOTAL	5,060	4,416	2,953

### Fresh Apple Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
China	594	580	786	PNG	865	1,032	701
Vietnam	-	-	< 0.5	Hong Kong	428	493	459
New Zealand	550	152	-	China	125	233	247
Other	-	-	0	Sri Lanka	447	215	234
TOTAL	1,145	732	786	Italy	453	521	213
				Other	2,742	1,922	1,099
				TOTAL	5,060	4,416	2,953

Source: GTA



## Apples

### Processed Apple International Trade

For the year ending June 2020, an additional **882 tonnes** of dried apples were imported, while **96 tonnes** were exported. Australia also imported **22.5 mega litres** of apple juice, while exporting **2.6 mega litres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 61.



Source: GTA





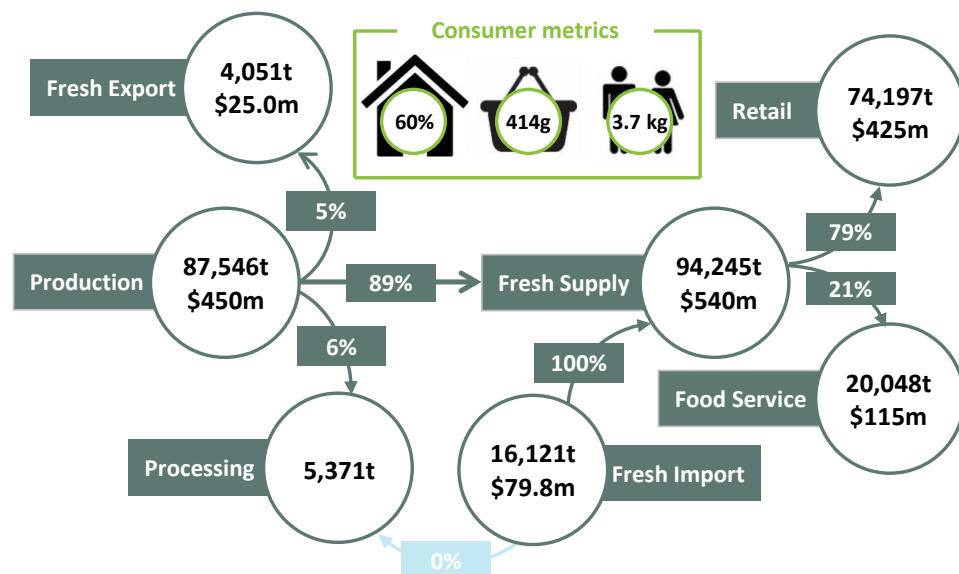
## Fresh Avocado Overview

Avocado production occurs mainly in Queensland and Northern New South Wales during the winter, and Western Australia during the summer. The most common varieties of avocado in Australia are the Hass and Shepard. For the year ending June 2020:

- **87,546 t** produced and valued at **\$450 m**.
- The wholesale value of the fresh supply was **\$540 m**, with **\$425 m** distributed into retail and **\$115 m** into food service.
- **60%** of Australian households purchased avocados, buying an average of **414g** per shopping trip.
- The supply per capita was **3.7 kg**, based on the volume supplied.



## Fresh Avocado Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	77,032	85,545	+11%	87,546	+2%
Production (\$m)	\$ 543.0	\$ 444.0	-18%	\$ 450.0	+1%
Producing Trees (000 Trees)	1,991	-	-	-	-
Fresh Export Volume (t)	1,786	3,202	+79%	4,051	+27%
Fresh Export Value (\$m)	\$ 11.6	\$ 19.7	+69%	\$ 25.0	+27%
Fresh Import Volume (t)	11,330	14,562	+29%	16,121	+11%
Fresh Import Value (\$m)	\$ 71.7	\$ 73.3	+2%	\$ 79.8	+9%
Fresh Supply (t)	81,722	91,515	+12%	94,245	+3%
Fresh Supply Wholesale Value (\$m)	\$ 650.9	\$ 512.2	-21%	\$ 540.0	+5%
Supply per Capita (kg)	3.28	3.63	+11%	3.65	<1%
Retail Supply (t)	-	69,432	-	74,197	+7%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 388.6	-	\$ 425.1	+9%
Food Service Supply (t)	-	22,084	-	20,048	-9%
Food Service Wholesale Value (\$m)	\$ -	\$ 123.6	-	\$ 114.9	-7%

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

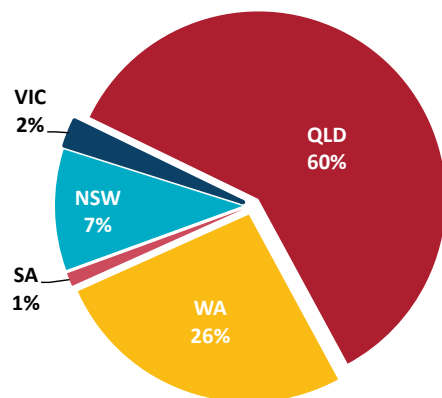
## Major Avocado Production Areas



Source: AAL



## 2019/20 Fresh Avocado Production by State



Source: AAL

## Fresh Avocado Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	52,440												
Western Australia	22,934												
New South Wales	9,137												
Victoria	2,023												
South Australia	1,011												
Availability legend			High		Medium		Low						

Source: AAL; GTA

## Main Avocado Varieties

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

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

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

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

## Seasonality by Avocado Variety

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

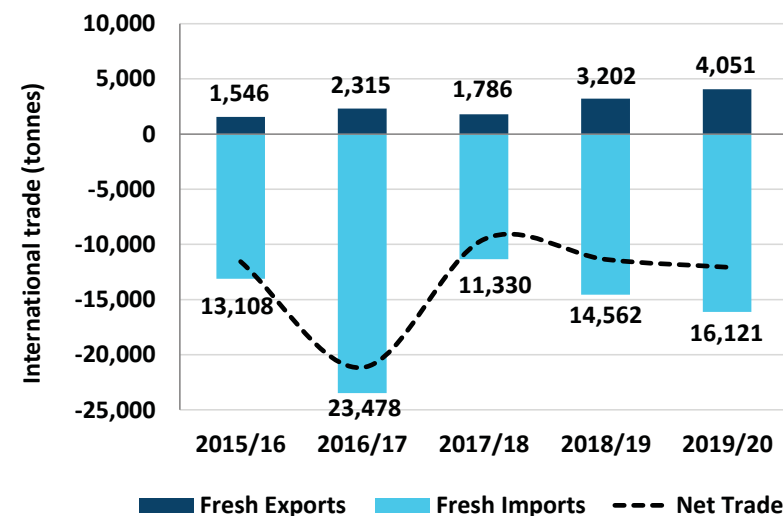
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	68,042												
Shepard	17,144												
Other	2,361												
Availability legend			High		Medium		Low						

Source: AAL

## Fresh Avocado International Trade

Australia has traditionally been a net importer of fresh avocados. For the year ending June 2020, Australia imported **16,121 tonnes**, and exported **4,051 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Avocado International Trade



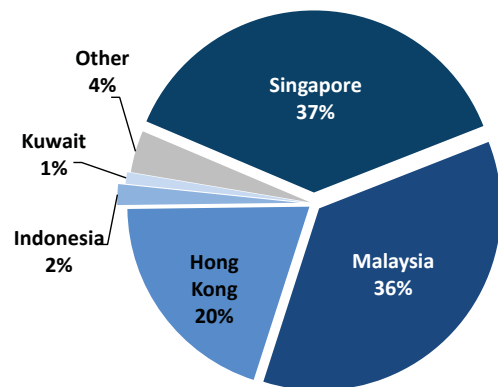
Source: GTA





For the year ending June 2020, Singapore received **37%** of exported fresh avocados each, as profiled in the chart below.

## 2019/20 Fresh Avocado Exports by Country



Source: GTA

## Fresh Avocado Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Queensland	6,791	8,644	8,829	Queensland	1,118	1,643	1,559
New South Wales	3,779	5,146	6,273	Western Australia	276	793	1,370
Victoria	759	772	1,020	New South Wales	131	536	563
<b>TOTAL</b>	<b>11,330</b>	<b>14,562</b>	<b>16,121</b>	Victoria	181	163	493
				South Australia	78	60	65
				<b>Other</b>	<b>2</b>	<b>7</b>	<b>1</b>
				<b>TOTAL</b>	<b>1,786</b>	<b>3,202</b>	<b>4,051</b>

## Fresh Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New Zealand	11,330	14,561	16,121	Singapore	668	1,280	1,526
South Africa	-	1	-	Malaysia	804	1,399	1,455
<b>TOTAL</b>	<b>11,330</b>	<b>14,562</b>	<b>16,121</b>	Hong Kong	206	360	804
				Indonesia	12	87	75
				Kuwait	30	11	41
				<b>Other</b>	<b>66</b>	<b>67</b>	<b>151</b>
				<b>TOTAL</b>	<b>1,786</b>	<b>3,202</b>	<b>4,051</b>

Source: GTA





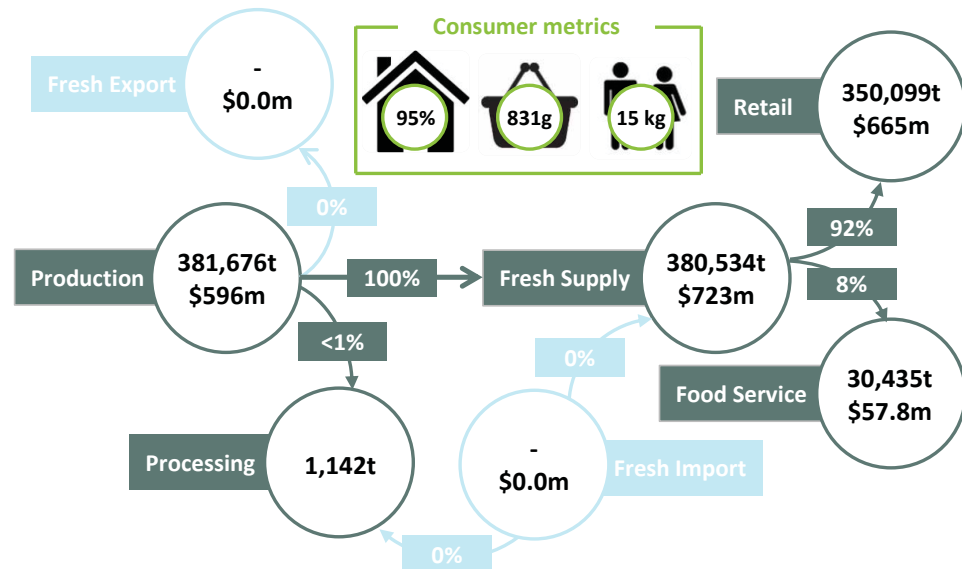
## Fresh Banana Overview

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

For the year ending June 2020:

- **381,676 t** was produced.
- The value of production was **\$596.2 m** while the wholesale value of the fresh supply was **\$722.5 m**.
- **95%** of Australian households purchased bananas, buying an average of **831 g** per shopping trip.
- The supply per capita was **15 kg**, based on the volume supplied.

## Fresh Banana Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	388,265	372,204	-4%	381,676	+3%
Production (\$m)	\$ 484.2	\$ 604.9	+25%	\$ 596.2	-1%
Production area (Ha)	12,477	10,962	-12%	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	387,104	371,091	-4%	380,534	+3%
Fresh Supply Wholesale Value (\$m)	\$ 586.8	\$ 733.0	+25%	\$ 722.5	-1%
Supply per Capita (kg)	15.53	14.72	-5%	14.75	<1%
Retail Supply (t)	-	331,331	+3%	350,099	+6%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 654.5	-4%	\$ 664.7	+2%
Food Service Supply (t)	-	39,760	-	30,435	-23%
Food Service Wholesale Value (\$m)	\$ -	\$ 78.5	+10%	\$ 57.8	-26%

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

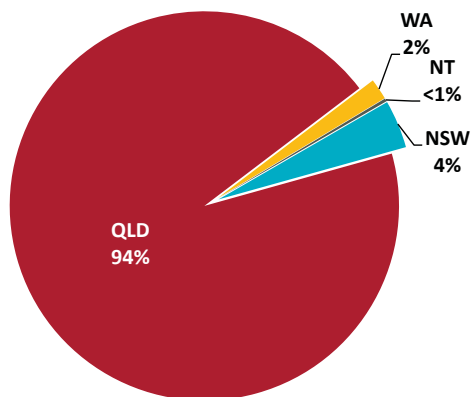
## Major Banana Production Areas



Source: ABGC



## 2019/20 Fresh Banana Production by State



Source: ABGC

## Fresh Banana Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	358,775												
Western Australia	6,679												
Northern Territory	954												
New South Wales	15,267												
Availability legend			High		Medium		Low						

Source: ABGC

## Main Banana Varieties

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

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

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



## Seasonality by Banana Variety

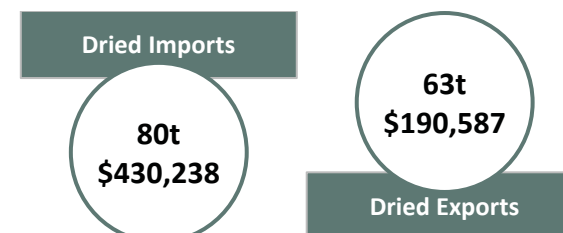
The seasonal availability of some major varieties is profiled in the table below.

Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	370,226												
Lady Fingers	11,450												
Availability legend			High		Medium		Low						

Source: ABGC

## Processed Banana International Trade

Australia has a limited amount of international trade in fresh bananas, with the little trade that does occur being dominated by dried banana products. For the year ending June 2020, **80 tonnes** of dried bananas were imported, while **63 tonnes** was exported.



Source: GTA



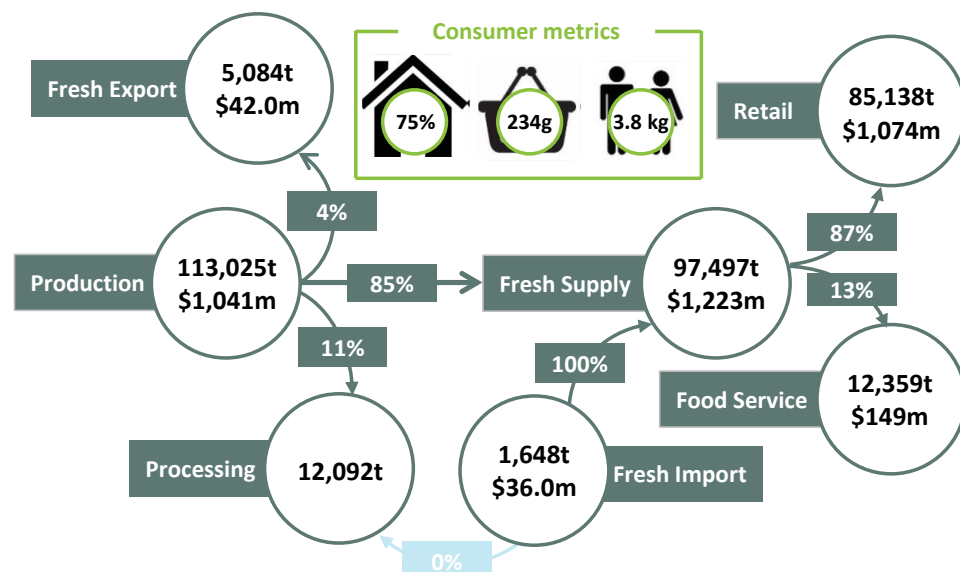
## Fresh Berries Overview

Pages 74-75 profile total berry production and trade. It combines information on blueberries, strawberries and rubus berries (such as raspberries and blackberries). The following pages profile each berry category in more detail.

For the year ending June 2020:

- **113,025 t** was produced valued at **\$1,041 m**.
- The wholesale value of the fresh supply was **\$1,222.9 m** with **\$968 m** distributed into retail and **\$146 m** into food service.
- **75%** of Australian households purchased fresh berries, buying an average of **234 g** per shopping trip.
- The supply per capita was **3.8 kg**, based on the volume supplied.

### Fresh Berries Supply Chain—Year Ending June 2020



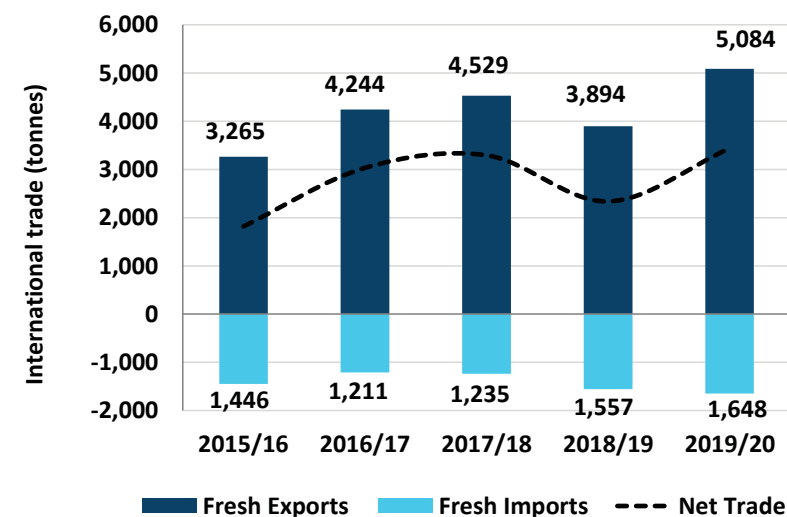
Sources: ABS; AC; CFVIWA; GTA; IRB; MP & DD (Freshlogic Analysis)

Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	117,318	105,090	-10%	113,025	+8%
Production (\$m)	\$ 929.2	\$ 938.6	+1%	\$ 1,040.6	+11%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	4,529	3,894	-14%	5,084	+31%
Fresh Export Value (\$m)	\$ 34.2	\$ 29.3	-14%	\$ 42.0	+44%
Fresh Import Volume (t)	1,235	1,557	+26%	1,648	+6%
Fresh Import Value (\$m)	\$ 29.5	\$ 33.0	+12%	\$ 36.0	+9%
Fresh Supply (t)	99,306	95,115	-4%	97,497	+3%
Fresh Supply Wholesale Value (\$m)	\$ 1,086.3	\$ 1,113.5	+3%	\$ 1,222.9	+10%
Supply per Capita (kg)	3.98	3.77	-5%	3.78	<1%
Retail Supply (t)	-	81,880	-	85,138	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 967.7	-	\$ 1,073.9	+11%
Food Service Supply (t)	-	13,234	-	12,359	-7%
Food Service Wholesale Value (\$m)	\$ -	\$ 145.9	-	\$ 149.0	+2%

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

## Fresh Berries International Trade

### Net Fresh Berries International Trade



Source: GTA





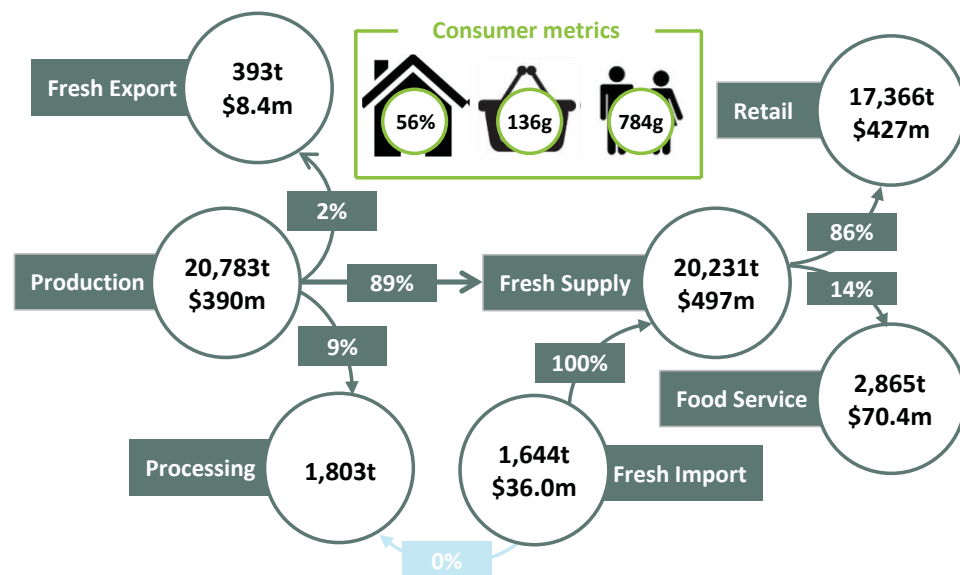
## Fresh Blueberries Overview

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

For the year ending June 2020:

- **20,783 t** was produced and valued at **\$389.6 m**.
- The wholesale value of the fresh supply was **\$497.4 m** with **\$427 m** distributed into retail and **\$70.4 m** into food service.
- **56%** of Australian households purchased fresh blueberries, buying an average of **136 g** per shopping trip.
- The supply per capita was **784 g**, based on the volume supplied.

## Fresh Blueberries Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	16,850	19,008	+13%	20,783	+9%
Production (\$m)	\$ 309.0	\$ 338.7	+10%	\$ 389.6	+15%
Production area (Ha)	1,375	1,375	-	1,375	-
Fresh Export Volume (t)	221	201	-9%	393	+96%
Fresh Export Value (\$m)	\$ 4.4	\$ 4.8	+8%	\$ 8.4	+75%
Fresh Import Volume (t)	1,234	1,555	+26%	1,644	+6%
Fresh Import Value (\$m)	\$ 29.5	\$ 33.0	+12%	\$ 36.0	+9%
Fresh Supply (t)	16,401	18,713	+14%	20,231	+8%
Fresh Supply Wholesale Value (\$m)	\$ 394.4	\$ 436.1	+11%	\$ 497.4	+14%
Supply per Capita (kg)	0.66	0.74	+13%	0.78	+6%
Retail Supply (t)	-	15,994	-	17,366	+9%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 372.7	-	\$ 427.0	+15%
Food Service Supply (t)	-	2,719	-	2,865	+5%
Food Service Wholesale Value (\$m)	\$ -	\$ 63.4	-	\$ 70.4	+11%

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

## Major Blueberry Production Areas

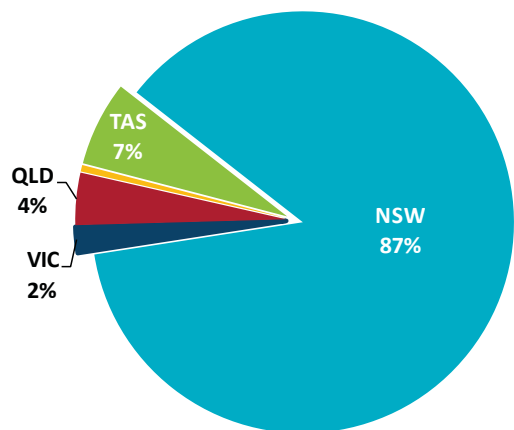


Source: BA





## 2019/20 Fresh Blueberries Production by State



Source: BA

## Fresh Blueberries Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	18,081												
Queensland	831												
Tasmania	1,351												
Victoria	416												
South Australia	104												
Imports	1,644												
Availability legend		High	Medium	Low	None								

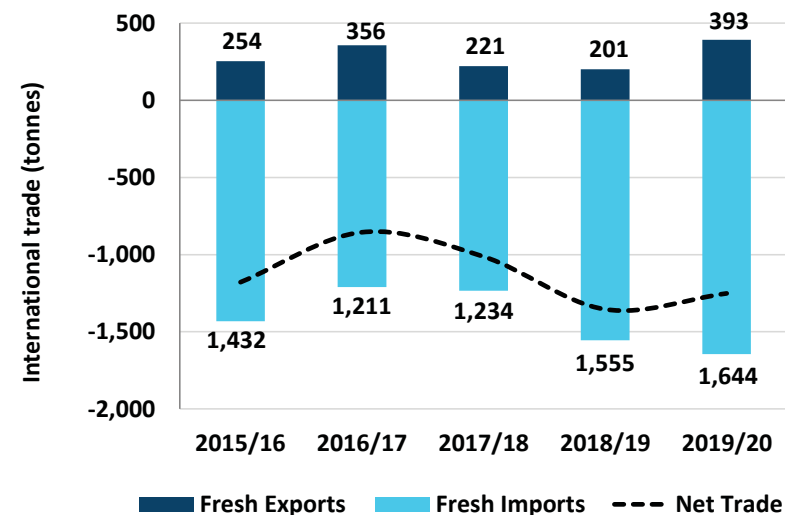
Source: BA

## Fresh Blueberries International Trade

Australia has traditionally been a net importer of fresh blueberries, typically importing **1,000-1,700** tonnes per year, with the majority of this volume coming from New Zealand. For the year ending June 2020, Australia imported **1,644 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.



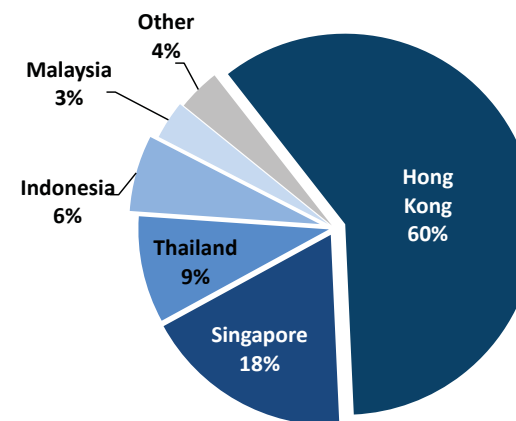
## Net Fresh Blueberries International Trade



Source: GTA

For the year ending June 2020, **60%** of exported fresh blueberries were sent to Hong Kong, as profiled in the chart on the below.

## 2019/20 Fresh Blueberries Exports by Country



Source: GTA



## Fresh Blueberry Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	601	772	840	New South Wales	122	126	232
Queensland	274	375	384	Queensland	80	63	140
Western Australia	185	199	234	Victoria	19	9	19
Victoria	131	197	150	Western Australia	-	< 0.5	1
South Australia	44	12	36	Tasmania	< 0.5	< 0.5	-
<b>Other</b>	-	-	-	<b>Other</b>	< 0.5	3	-
<b>TOTAL</b>	<b>1,234</b>	<b>1,555</b>	<b>1,644</b>	<b>TOTAL</b>	<b>221</b>	<b>201</b>	<b>393</b>

## Fresh Blueberry Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New Zealand	1,231	1,497	1,640	Hong Kong	112	125	235
Chile	-	9	4	Singapore	59	39	70
US	-	46	-	Thailand	26	18	36
Iran	1	-	-	Indonesia	4	4	25
UK	< 0.5	-	-	Malaysia	< 0.5	4	13
<b>Other</b>	<b>2</b>	<b>3</b>	-	<b>Other</b>	<b>21</b>	<b>11</b>	<b>14</b>
<b>TOTAL</b>	<b>1,234</b>	<b>1,555</b>	<b>1,644</b>	<b>TOTAL</b>	<b>221</b>	<b>201</b>	<b>393</b>

Source: GTA





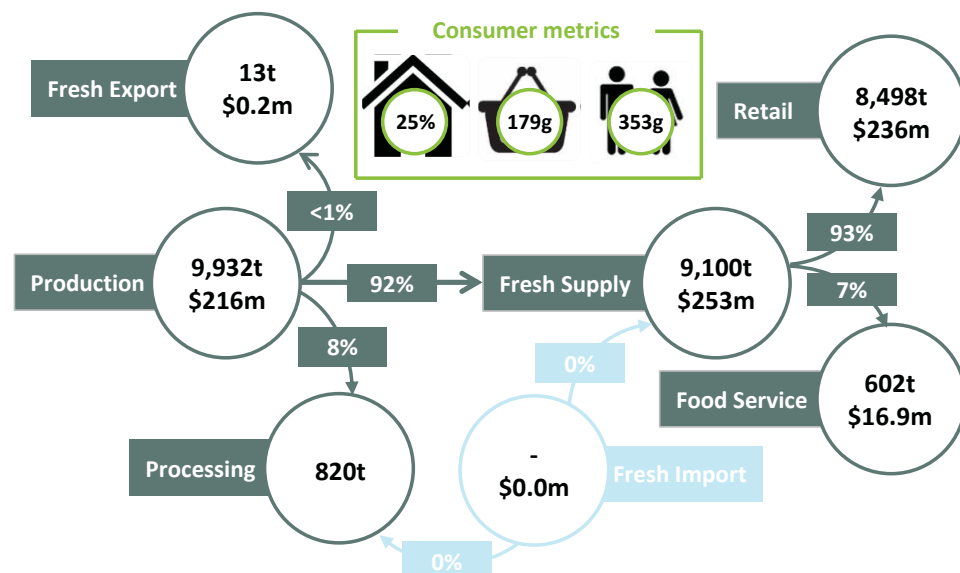
## Fresh Rubus Berries Overview

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

For the year ending June 2020:

- **9,932 t** was produced valued at **\$216.0 m**.
- The wholesale value of the fresh supply was **\$252.9 m** with **\$236 m** distributed into retail and **\$16.9 m** into food service.
- **25%** of Australian households purchased fresh rubus berries, buying an average of **179 g** per shopping trip.
- The supply per capita was **353 g**, based on the volume of supply.

## Fresh Rubus Berries Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,922	9,478	+37%	9,932	+5%
Production (\$m)	\$ 175.1	\$ 207.5	+18%	\$ 216.0	+4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3	8	>100%	13	+55%
Fresh Export Value (\$m)	< \$0.1	\$ 0.1	>100%	\$ 0.2	>100%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	6,391	8,825	+38%	9,100	+3%
Fresh Supply Wholesale Value (\$m)	\$ 205.1	\$ 243.2	+19%	\$ 252.9	+4%
Supply per Capita (kg)	0.26	0.35	+37%	0.35	<1%
Retail Supply (t)	-	8,128	-	8,498	+5%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 223.8	-	\$ 236.0	+5%
Food Service Supply (t)	-	696	-	602	-14%
Food Service Wholesale Value (\$m)	\$ -	\$ 19.4	-	\$ 16.9	-13%

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

## Major Rubus Berries Production Areas

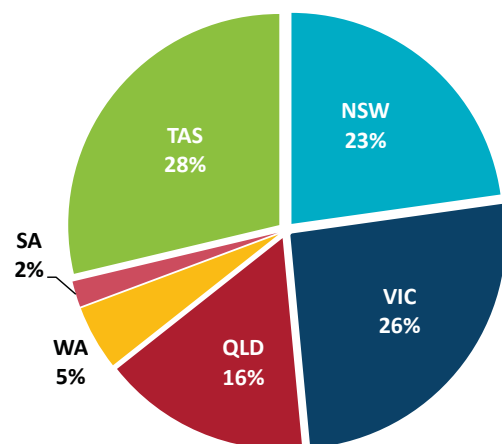


Source: BA



## Berries—Rubus Berries

### 2019/20 Fresh Rubus Berries Production by State



Source: BA

### Fresh Rubus Berries Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,262												
Victoria	2,557												
Queensland	1,573												
Western Australia	492												
South Australia	197												
Tasmania	2,852												
Availability legend			High		Medium		Low						None

Source: BA

## Main Rubus Berries Types

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

**Raspberries**, a bright red aggregate fruit with a hollow core. Raspberries accounted for **75%** of fresh production.

**Blackberries**, a black aggregate fruit with a white core. Blackberries accounted for **25%** of fresh production.

## Berries—Rubus Berries



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

### Seasonality by Rubus Berry Type

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

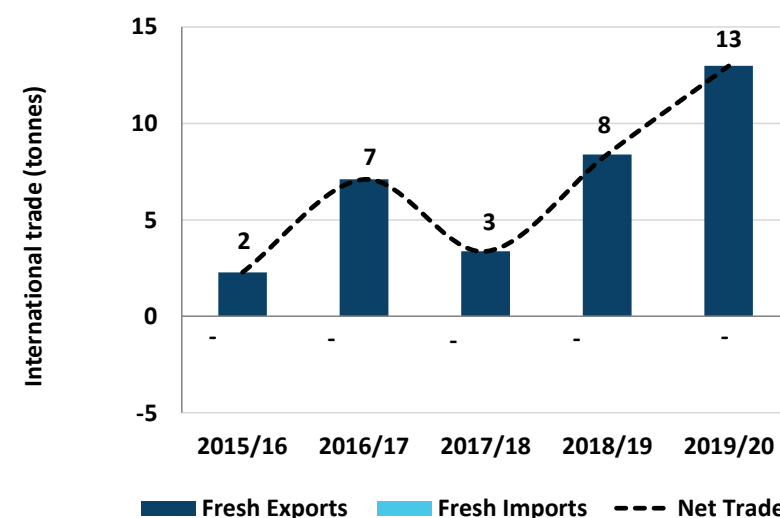
Type	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	7,404												
Blackberries	2,483												
Other	45												
Availability legend			High		Medium		Low						None

Source: BA

## Fresh Rubus Berries International Trade

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

### Net Fresh Rubus Berries International Trade



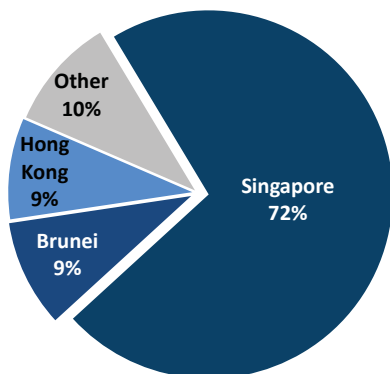
Source: GTA



## Berries—Rubus Berries

For the year ending June 2020, **72%** of exported fresh rubus berries were sent to India, as profiled in the chart below.

### 2019/20 Fresh Rubus Berries Exports by Country



Source: GTA

### Fresh Rubus Berries Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
New South Wales	1	2	10
Victoria	2	4	3
Queensland	<0.5	2	<0.5
Western Australia	-	<0.5	<0.5
Tasmania	-	-	<0.5
<b>TOTAL</b>	<b>3</b>	<b>8</b>	<b>13</b>

### Fresh Rubus Berries Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
Singapore	-	4	9
Brunei	-	<0.5	1
Hong Kong	<0.5	2	1
Fiji	1	1	<0.5
PNG	<0.5	<0.5	<0.5
<b>Other</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>TOTAL</b>	<b>3</b>	<b>8</b>	<b>13</b>

Source: GTA



## Berries—Rubus Berries

### Processed Rubus Berries International Trade

For the year ending June 2020, an additional **9,009 tonnes** of frozen rubus berries were imported, while **41 tonnes** were exported. These volumes have not been included in the fresh imports and exports profiled on page 85.

Frozen Imports

9,009t  
\$40.9m

41t  
\$243,612

Frozen Exports

Source: GTA







## Fresh Strawberries Overview

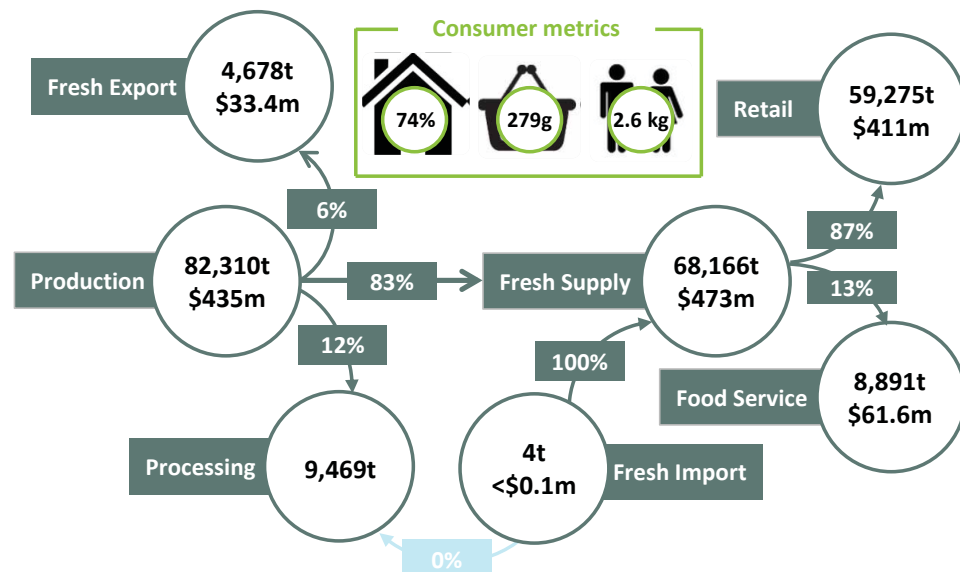
Strawberries are grown in most states in Australia. Year-round availability is made possible through the different regions.

For the year ending June 2020:

- **82,310 t** was produced valued at **\$435.0 m** with **7%** sent to be processed, predominantly in preserves.
- The wholesale value of the fresh supply was **\$472.6 m** with **\$411 m** distributed into retail and **\$61.6 m** into food service.
- **74%** of Australian households purchased fresh strawberries, buying an average of **279 g** per shopping trip.
- The supply per capita was **2.6 kg**, based on the volume supplied.



## Fresh Strawberries Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	93,545	76,605	-18%	82,310	+7%
Production (\$m)	\$ 445.0	\$ 392.4	-12%	\$ 435.0	+11%
Production area (Ha)	2,796	-	-	-	-
Fresh Export Volume (t)	4,304	3,685	-14%	4,678	+27%
Fresh Export Value (\$m)	\$ 29.7	\$ 24.4	-18%	\$ 33.4	+37%
Fresh Import Volume (t)	<1	2	>100%	4	+94%
Fresh Import Value (\$m)	<\$0.1	<\$0.1	-56%	<\$0.1	>100%
Fresh Supply (t)	76,514	67,577	-12%	68,166	<1%
Fresh Supply Wholesale Value (\$m)	\$ 486.8	\$ 434.2	-11%	\$ 472.6	+9%
Supply per Capita (kg)	3.07	2.68	-13%	2.64	-1%
Retail Supply (t)	-	57,758	-	59,275	+3%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 371.1	-	\$ 410.9	+11%
Food Service Supply (t)	-	9,819	-	8,891	-9%
Food Service Wholesale Value (\$m)	\$ -	\$ 63.1	-	\$ 61.6	-2%

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

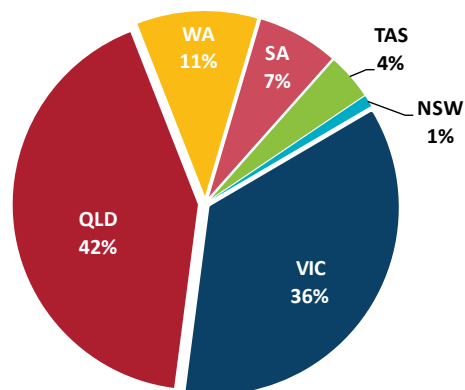
## Major Strawberry Production Areas



Source: SAI



## 2019/20 Fresh Strawberries Production by State



Source: SAI

## Fresh Strawberries Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	29,220												
Queensland	34,570												
Western Australia	8,643												
South Australia	5,762												
Tasmania	3,292												
New South Wales	823												
Availability legend		High		Medium		Low		None					

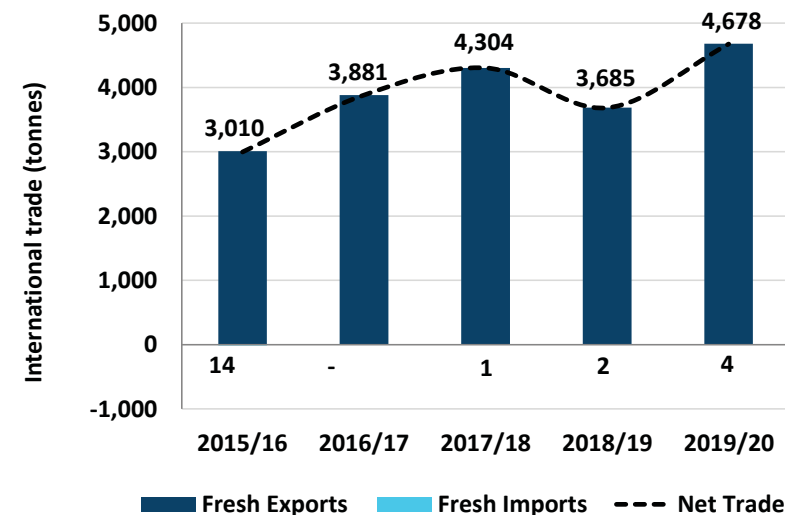
Source: SAI

## Fresh Strawberries International Trade

Australia has traditionally been a net exporter of fresh strawberries, with exports having increased in recent years. For the year ending June 2020, Australia exported **4,678 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.



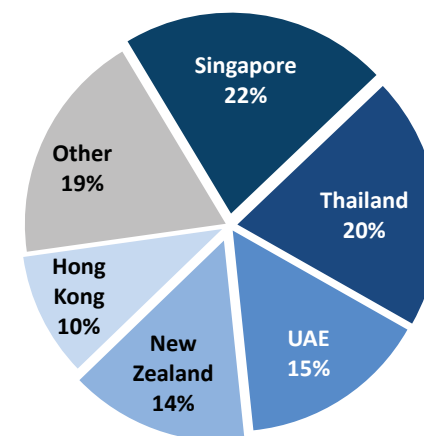
## Net Fresh Strawberries International Trade



Source: GTA

For the year ending June 2020, **22%** of exported fresh strawberries were sent to Singapore, as profiled in the chart below.

## 2019/20 Fresh Strawberries Exports by Country



Source: GTA



## Fresh Strawberries Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
South Australia	-	-	3	Western Australia	3,473	2,835	3,576
Western Australia	-	-	< 0.5	Queensland	530	485	616
Queensland	-	2	-	New South Wales	279	356	419
Victoria	-	< 0.5	-	Victoria	16	8	66
New South Wales	1	-	-	South Australia	6	< 0.5	< 0.5
<b>Other</b>	-	< 0.5	< 0.5	<b>Other</b>	< 0.5	1	< 0.5
<b>TOTAL</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>TOTAL</b>	<b>4,304</b>	<b>3,685</b>	<b>4,678</b>

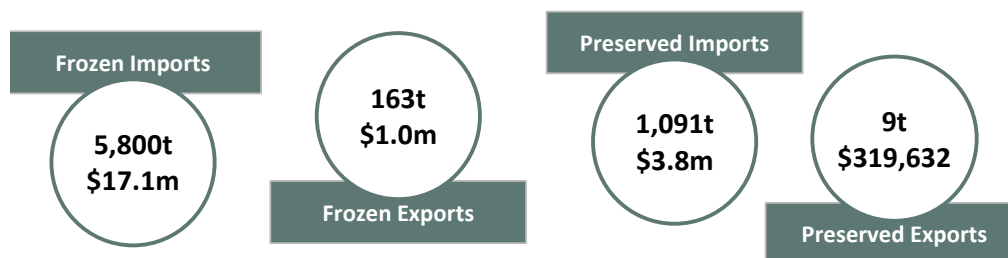
## Fresh Strawberries Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Germany	-	2	2	Singapore	734	660	1,006
Turkey	-	-	1	Thailand	617	749	951
New Zealand	-	< 0.5	< 0.5	UAE	797	453	709
Sth. Korea	1	-	-	New Zealand	770	552	675
<b>Other</b>	-	< 0.5	< 0.5	Hong Kong	491	477	468
<b>TOTAL</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>Other</b>	<b>895</b>	<b>794</b>	<b>871</b>
				<b>TOTAL</b>	<b>4,304</b>	<b>3,685</b>	<b>4,678</b>

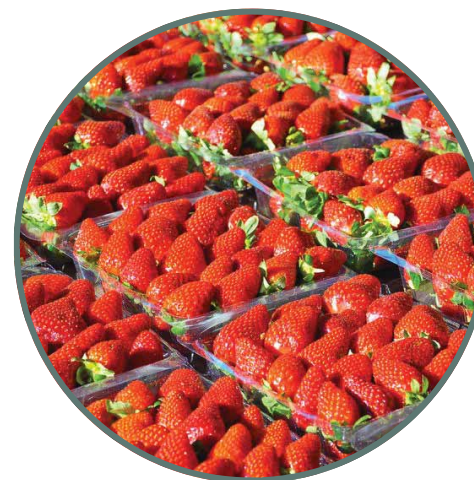
Source: GTA

## Processed Strawberries International Trade

For the year ending June 2020, an additional **5,800 tonnes** of frozen strawberries were imported, while **163 tonnes** were exported. Australia also imported **1,091 tonnes** of preserved strawberries, while exporting **9 tonnes** of preserved strawberries.



Source: GTA





## Fresh Cherries Overview

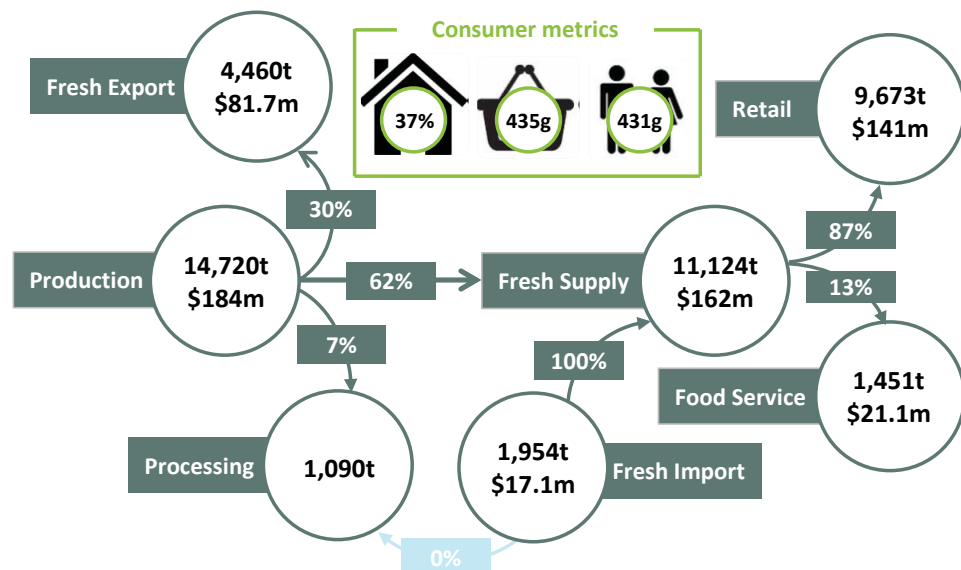
Cherries are produced during the summer months, with the majority of production occurring in the southern states of Australia.

For the year ending June 2020:

- **14,720 t** produced and valued at **\$184 m** with **7%** sent to be processed.
- The wholesale value of the fresh supply was **\$162 m**, with **\$141 m** distributed into retail and **\$21.1 m** into food service.
- **37%** of Australian households purchased fresh cherries, buying an average of **435 g** per shopping trip.
- The supply per capita was **431 g**, based on the volume supplied.



## Fresh Cherries Supply Chain—Year Ending June 2020



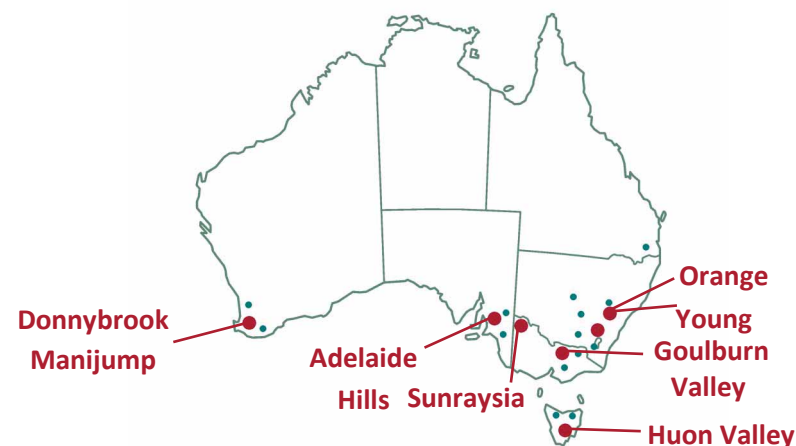
Sources: ABS; AC; CFVIWA; Cherry Growers Australia Inc. (CGAI); GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	15,650	20,147	+29%	14,720	-27%
Production (\$m)	\$ 148.7	\$ 189.3	+27%	\$ 184.0	-3%
Producing Trees (000 Trees)	2,381	-	-	-	-
Fresh Export Volume (t)	4,114	5,035	+22%	4,460	-11%
Fresh Export Value (\$m)	\$ 62.2	\$ 79.5	+28%	\$ 81.7	+3%
Fresh Import Volume (t)	2,198	2,425	+10%	1,954	-19%
Fresh Import Value (\$m)	\$ 15.6	\$ 17.6	+13%	\$ 17.1	-3%
Fresh Supply (t)	12,702	15,379	+21%	11,124	-28%
Fresh Supply Wholesale Value (\$m)	\$ 135.1	\$ 167.6	+24%	\$ 161.7	-4%
Supply per Capita (kg)	0.51	0.61	+20%	0.43	-29%
Retail Supply (t)	-	12,503	-	9,673	-23%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 136.3	-	\$ 140.6	+3%
Food Service Supply (t)	-	2,876	-	1,451	-50%
Food Service Wholesale Value (\$m)	\$ -	\$ 31.3	-	\$ 21.1	-33%

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

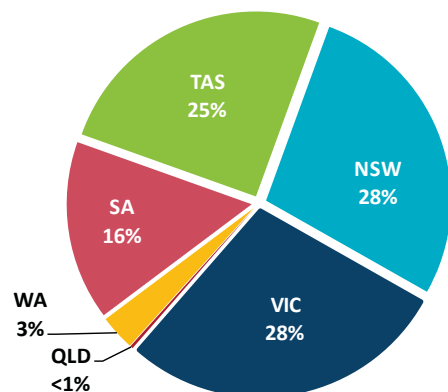
## Major Cherry Production Areas



Source: CGAI



## 2019/20 Fresh Cherries Production by State



Source: CGAI

## Fresh Cherries Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	4,151												
New South Wales	4,070												
Tasmania	3,695												
South Australia	2,311												
Western Australia	456												
Queensland	37												
Imports	1,954												
Availability legend			High		Medium		Low						None

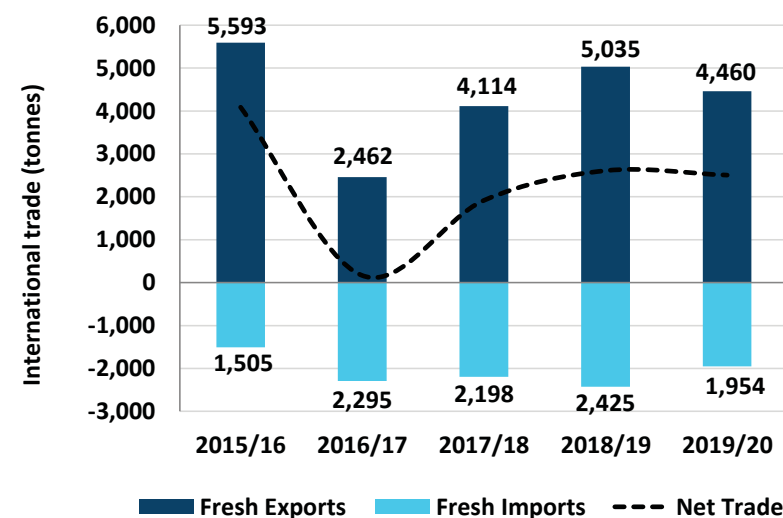
Source: CGAI

## Fresh Cherries International Trade

Australia is now a net exporter of fresh cherries, after recent increases to export volumes, with the majority of this volume exported to China and Hong Kong. For the year ending June 2020, Australia imported **1,954 tonnes** of fresh cherries primarily from the United States, and exported **4,460 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.



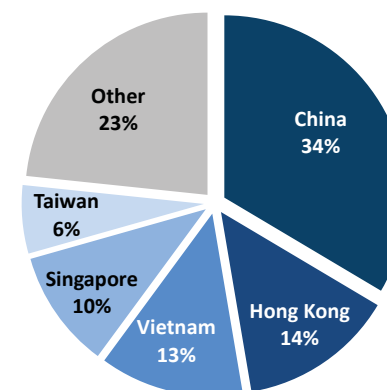
## Net Fresh Cherry International Trade



Source: GTA

For the year ending June 2020, **34%** of exported fresh cherries were sent to China, as profiled in the chart below.

## 2019/20 Fresh Cherries Exports by Country







## Fresh Cherries Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	1,353	1,482	1,180	Tasmania	2,135	1,896	1,731
Victoria	456	474	394	Victoria	1,235	1,986	1,682
Western Australia	173	215	192	New South Wales	604	1,050	950
Queensland	216	255	188	South Australia	125	73	77
Other	< 0.5	-	-	Queensland	16	11	18
<b>TOTAL</b>	<b>2,198</b>	<b>2,425</b>	<b>1,954</b>	<b>Other</b>	<b>&lt; 0.5</b>	<b>19</b>	<b>2</b>
				<b>TOTAL</b>	<b>4,114</b>	<b>5,035</b>	<b>4,460</b>

## Fresh Cherries Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	2,188	2,424	1,951	China	678	1,593	1,496
New Zealand	-	1	3	Hong Kong	1,229	915	615
Serbia	-	< 0.5	-	Vietnam	392	598	570
Canada	9	-	-	Singapore	480	587	469
Iran	1	-	-	Taiwan	260	313	270
<b>Other</b>	<b>1</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>Other</b>	<b>1,076</b>	<b>1,030</b>	<b>1,041</b>
<b>TOTAL</b>	<b>2,198</b>	<b>2,425</b>	<b>1,954</b>	<b>TOTAL</b>	<b>4,114</b>	<b>5,035</b>	<b>4,460</b>

Source: GTA

## Processed Cherries International Trade

For the year ending June 2020, an additional **2,093 kilolitres** of preserved cherries in liquid were imported, while **12 tonnes** of preserved cherries were exported.



Source: GTA





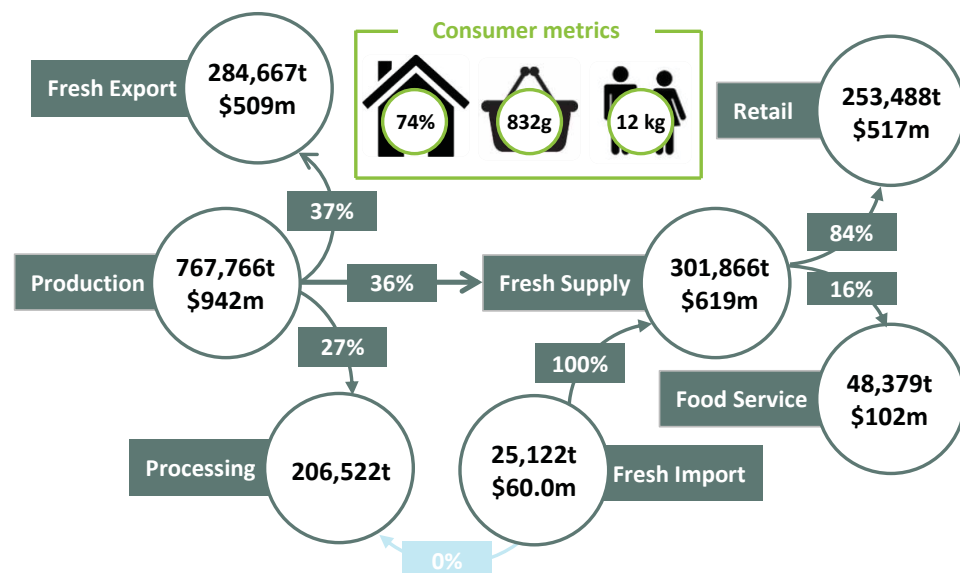
## Fresh Citrus Fruit Overview

Pages 100-101 profile total citrus fruit production and trade. They combine information on grapefruit, lemons/limes, mandarins and oranges. The following pages profile each citrus fruit category in more detail. For the year ending June 2020:

- **767,766 t** was produced valued at **\$942.4 m**.
- The wholesale value of the fresh supply was **\$619 m** with **\$517 m** distributed into retail and **\$102 m** into food service.
- **74%** of Australian households purchased a citrus fruit, buying an average of **832 g** per shopping trip.
- The supply per capita of citrus for the year ending June 2020 was **12 kg**, based on the volume supplied.



## Fresh Citrus Fruit Supply Chain—Year Ending June 2020



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



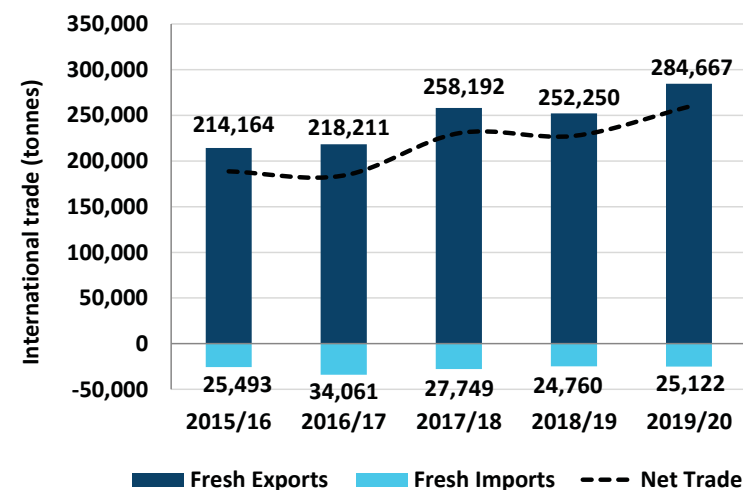
Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	764,318	762,483	>-1%	767,766	<1%
Production (\$m)	\$ 836.8	\$ 875.1	+5%	\$ 942.4	+8%
Producing Trees (000 Trees)	10,995	11,091	<1%	10,961	-1%
Fresh Export Volume (t)	258,192	252,250	-2%	284,667	+13%
Fresh Export Value (\$m)	\$ 427.7	\$ 457.1	+7%	\$ 508.5	+11%
Fresh Import Volume (t)	27,749	24,760	-11%	25,122	+1%
Fresh Import Value (\$m)	\$ 54.1	\$ 54.1	<1%	\$ 60.0	+11%
Fresh Supply (t)	310,708	311,018	<1%	301,866	-3%
Fresh Supply Wholesale Value (\$m)	\$ 578.6	\$ 592.5	+2%	\$ 619.0	+4%
Supply per Capita (kg)	12.46	12.34	>-1%	11.70	-5%
Retail Supply (t)	-	256,451	-	253,488	-1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 482.4	-	\$ 516.6	+7%
Food Service Supply (t)	-	54,567	-	48,379	-11%
Food Service Wholesale Value (\$m)	\$ -	\$ 110.1	-	\$ 102.4	-7%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

## Fresh Citrus Fruit International Trade

Net Fresh Citrus International Trade



Source: GTA

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



## Fresh Grapefruit Overview

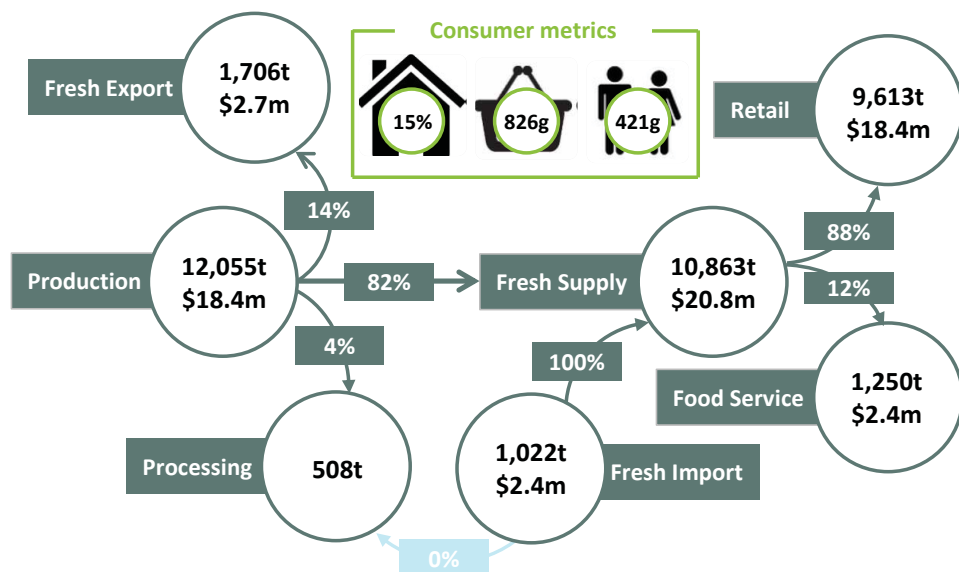
Grapefruit production occurs predominantly in the Murray Valley region. Imports, as well as production from Western Australia and the Northern Territory, allow for close to year round availability.

For the year ending June 2020:

- **12,055 t** was produced valued at **\$18.4 m** with **4%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$20.8 m** with **\$18.4 m** distributed into retail and **\$2.4 m** into food service.
- **15%** of Australian households purchased grapefruit, buying an average of **826 g** per shopping trip.
- The supply per capita was **421 g**, based on the volume supplied.



## Fresh Grapefruit Fresh Supply Chain—Year Ending June 2020



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

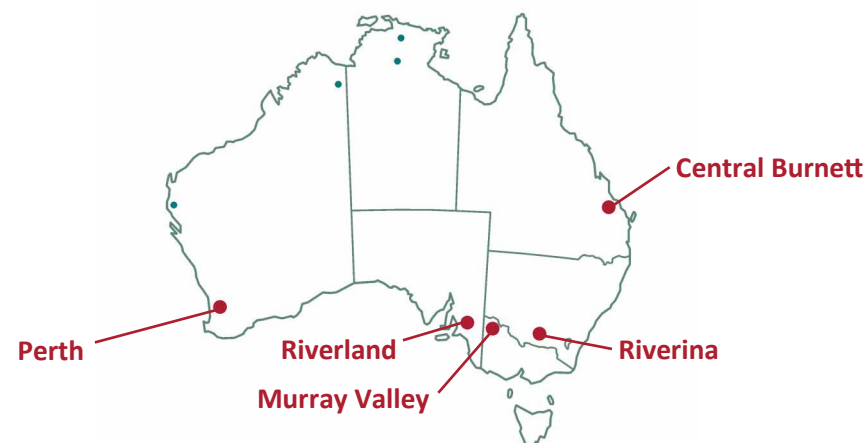


Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	12,660	11,133	-12%	12,055	+8%
Production (\$m)	\$ 16.7	\$ 16.1	-4%	\$ 18.4	+14%
Producing Trees (000 Trees)	137	136	>-1%	122	-10%
Fresh Export Volume (t)	1,198	1,203	<1%	1,706	+42%
Fresh Export Value (\$m)	\$ 2.1	\$ 2.1	-3%	\$ 2.7	+33%
Fresh Import Volume (t)	1,125	1,221	+9%	1,022	-16%
Fresh Import Value (\$m)	\$ 2.3	\$ 2.4	+5%	\$ 2.4	<1%
Fresh Supply (t)	12,052	10,680	-11%	10,863	+2%
Fresh Supply Wholesale Value (\$m)	\$ 19.3	\$ 19.0	-1%	\$ 20.8	+9%
Supply per Capita (kg)	0.48	0.42	-12%	0.42	>-1%
Retail Supply (t)	-	9,287	-	9,613	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 16.5	-	\$ 18.4	+11%
Food Service Supply (t)	-	1,393	-	1,250	-10%
Food Service Wholesale Value (\$m)	\$ -	\$ 2.5	-	\$ 2.4	-4%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

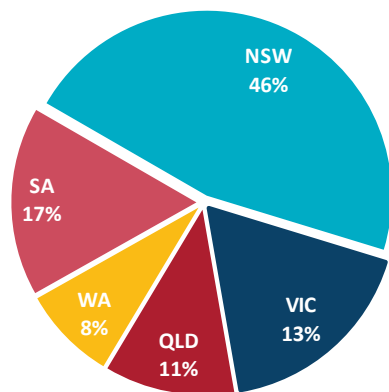
## Major Grapefruit Production Areas



Source: CA



## 2019/20 Fresh Grapefruit Production by State



Source: CA

## Fresh Grapefruit Seasonality by State

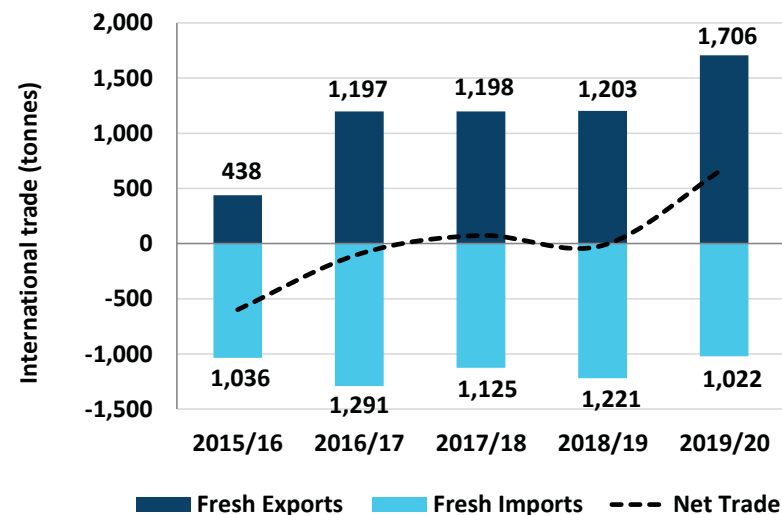
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,858												
Victoria	2,170												
Queensland	1,808												
Western Australia	1,085												
South Australia	2,411												
Northern Territory	723												
Availability legend			High		Medium		Low						

Source: CA

## Fresh Grapefruit International Trade

Australia has traditionally been a net importer of fresh grapefruit, typically importing **1,000+ tonnes** per year. Exports have been growing in the last 4 years. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

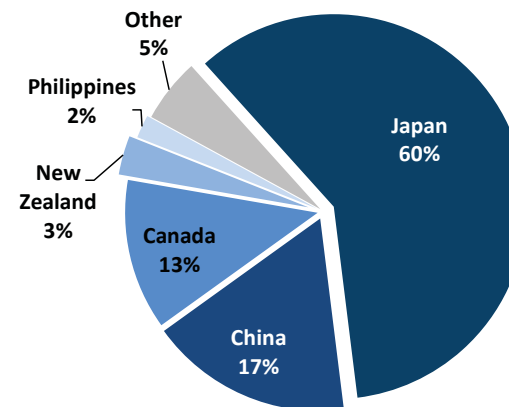
## Net Fresh Grapefruit International Trade



Source: GTA

For the year ending June 2020, **60%** of exported fresh grapefruit was sent to Japan, as profiled in the chart below.

## 2019/20 Fresh Grapefruit Exports by Country



Source: GTA



## Fresh Grapefruit Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Victoria	377	524	496	South Australia	689	851	1,003
New South Wales	427	319	318	New South Wales	346	260	486
Western Australia	275	362	209	Victoria	155	89	206
Queensland	46	9	-	Queensland	7	4	11
South Australia	-	6	-	Western Australia	-	-	< 0.5
<b>TOTAL</b>	<b>1,125</b>	<b>1,221</b>	<b>1,022</b>	<b>Other</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>1,198</b>	<b>1,203</b>	<b>1,706</b>

## Fresh Grapefruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	624	683	699	Japan	756	894	1,019
Israel	374	392	280	China	65	-	291
Egypt	127	144	42	Canada	227	199	216
Thailand	-	1	1	New Zealand	53	41	56
<b>Other</b>	<b>-</b>	<b>&lt; 0.5</b>	<b>-</b>	Philippines	40	12	33
<b>TOTAL</b>	<b>1,125</b>	<b>1,221</b>	<b>1,022</b>	<b>Other</b>	<b>58</b>	<b>58</b>	<b>92</b>
				<b>TOTAL</b>	<b>1,198</b>	<b>1,203</b>	<b>1,706</b>

Source: GTA

## Processed Grapefruit International Trade

For the year ending June 2020, an additional **99 tonnes** of solid grapefruit juice were imported, while **905 kilolitres** were exported.



Source: GTA







## Fresh Lemons/Limes

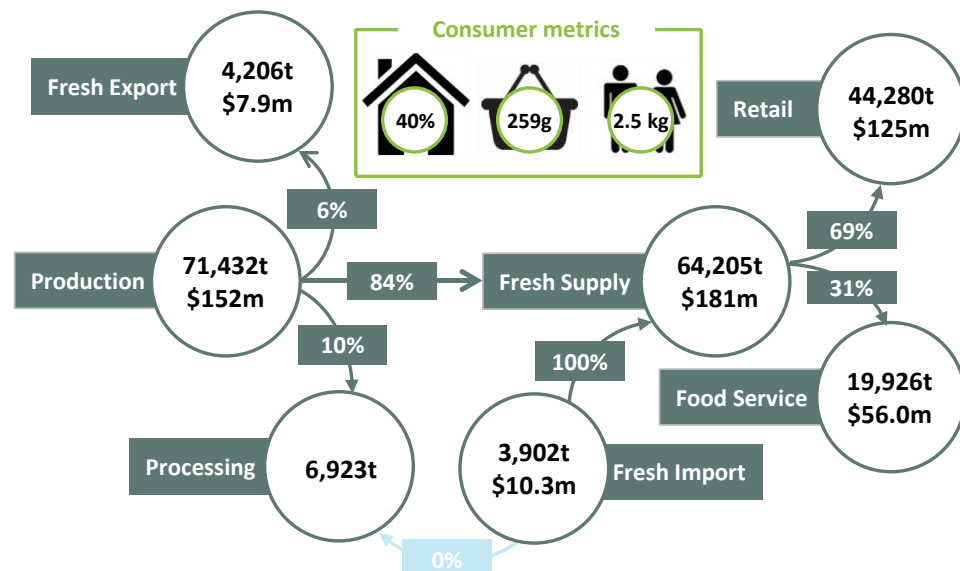
### Overview

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

For the year ending June 2020:

- **71,432 t** was produced valued at **\$152.3 m** with **10%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$180.6 m** with **\$124.5 m** distributed into retail and **\$56 m** into foodservice.
- **40%** of Australian households purchased fresh lemons or limes, buying an average of **259 g** per shopping trip.
- The supply per capita was **2.5 kg**, based on the volume supplied.

### Fresh Lemons/Limes Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	65,236	66,341	+2%	71,432	+8%
Production (\$m)	\$ 139.9	\$ 161.6	+15%	\$ 152.3	-6%
Producing Trees (000 Trees)	526	561	+7%	645	+15%
Fresh Export Volume (t)	2,883	3,394	+18%	4,206	+24%
Fresh Export Value (\$m)	\$ 6.0	\$ 7.2	+20%	\$ 7.9	+10%
Fresh Import Volume (t)	4,739	4,403	-7%	3,902	-11%
Fresh Import Value (\$m)	\$ 12.4	\$ 12.5	<1%	\$ 10.3	-17%
Fresh Supply (t)	61,364	61,483	<1%	64,205	+4%
Fresh Supply Wholesale Value (\$m)	\$ 170.8	\$ 195.6	+15%	\$ 180.6	-8%
Supply per Capita (kg)	2.46	2.44	>-1%	2.49	+2%
Retail Supply (t)	-	42,044	-	44,280	+5%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 133.7	-	\$ 124.5	-7%
Food Service Supply (t)	-	19,438	-	19,926	+3%
Food Service Wholesale Value (\$m)	\$ -	\$ 62.0	-	\$ 56.0	-10%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

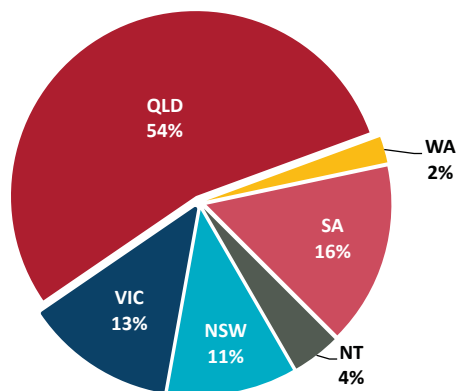
## Major Lemons/Limes Production Areas



Source: CA



## 2019/20 Fresh Lemons/Limes Production by State



Source: CA

## Fresh Lemons/Limes Seasonality by State.

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	7,973												
Victoria	9,011												
Queensland	38,535												
Western Australia	1,624												
South Australia	11,290												
Northern Territory	2,984												
Imported	3,902												
Availability legend		High		Medium		Low		None					

Source: CA

## Main Lemons/Limes Category

For the year ending June 2020:

**Lemons** accounted for **73%** of fresh production.

**Limes** accounted for **27%** of fresh production.



## Seasonality by Lemons/Limes Category

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

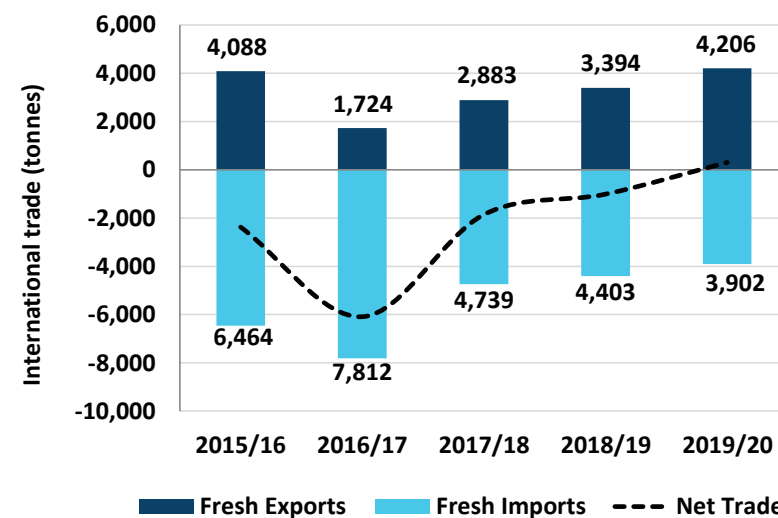
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	51,852												
Limes	19,564												
Availability legend		High		Medium		Low		None					

Source: CA

## Fresh Lemons/Limes International Trade

Australia has traditionally been a net importer of lemons and limes, with a significant amount of imports being sourced from the US. Exports have been growing in the last 3 years. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Lemons/Limes International Trade

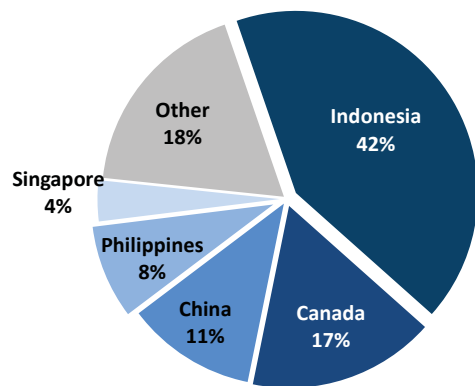


Source: GTA



For the year ending June 2020, **42%** of exported fresh lemons and limes were sent to Indonesia, as profiled in the chart below.

## 2019/20 Fresh Lemons/Limes Exports by Country



Source: GTA

## Fresh Lemons/Limes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	2,221	1,664	2,021	South Australia	1,067	1,251	1,237
Victoria	1,336	1,789	1,176	Victoria	587	764	1,190
Western Australia	798	726	589	Queensland	1,025	744	1,129
Queensland	383	127	117	New South Wales	149	616	639
South Australia	-	98	-	Western Australia	9	11	10
<b>TOTAL</b>	<b>4,739</b>	<b>4,403</b>	<b>3,902</b>	<b>Other</b>	<b>46</b>	<b>8</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>2,883</b>	<b>3,394</b>	<b>4,206</b>

## Fresh Lemons/Limes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	2,986	3,283	2,646	Indonesia	1,967	1,158	1,761
Egypt	1,651	957	1,063	Canada	111	602	699
Spain	23	113	189	China	43	162	484
Iran	-	1	4	Philippines	164	352	350
New Zealand	77	42	-	Singapore	127	232	152
<b>Other</b>	<b>1</b>	<b>8</b>	<b>-</b>	<b>Other</b>	<b>470</b>	<b>887</b>	<b>760</b>
<b>TOTAL</b>	<b>4,739</b>	<b>4,403</b>	<b>3,902</b>	<b>TOTAL</b>	<b>2,883</b>	<b>3,394</b>	<b>4,206</b>

Source: GTA





## Fresh Mandarins Overview

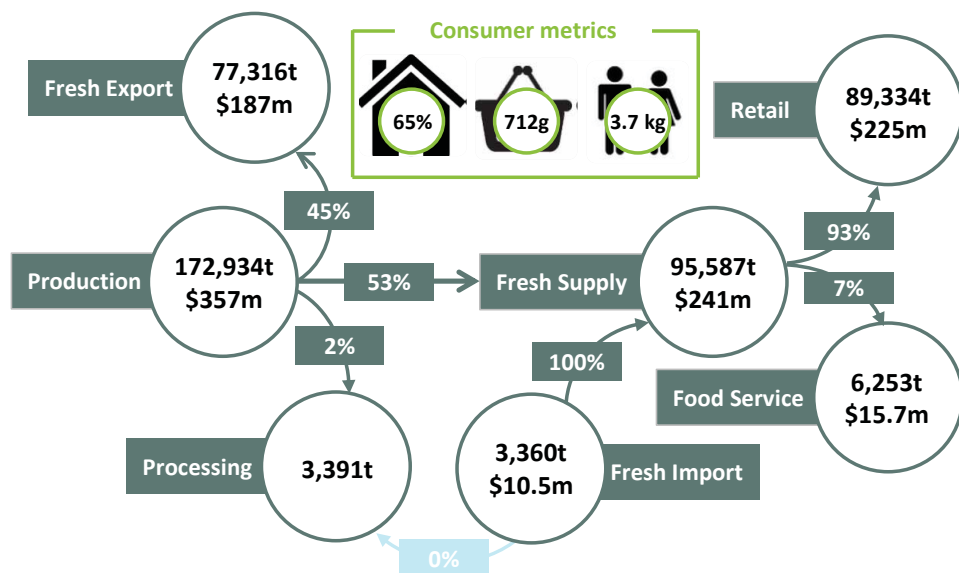
Mandarin production occurs across most states in Australia. Mandarins grow during the winter months.

For the year ending June 2020:

- **172,934 t** was produced valued at **\$357 m** with **2%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$241 m** with **\$225 m** distributed into retail and **\$15.7 m** into food service.
- **65%** of Australian households purchased fresh mandarins, buying an average of **712 g** per shopping trip.
- The supply per capita was **3.7 kg**, based on the volume supplied.



## Fresh Mandarins Supply Chain—Year Ending June 2020



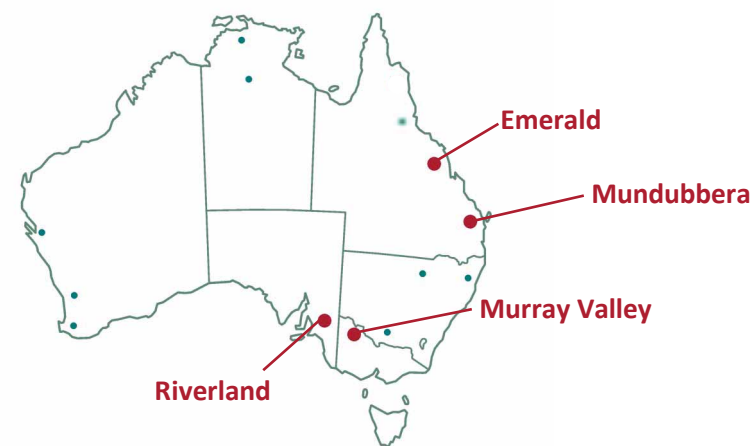
Sources: AC; Citrus Australia (CA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	160,343	156,914	-2%	172,934	+10%
Production (\$m)	\$ 307.2	\$ 298.6	-3%	\$ 357.0	+20%
Producing Trees (000 Trees)	2,623	2,742	+5%	2,636	-4%
Fresh Export Volume (t)	63,961	59,471	-7%	77,316	+30%
Fresh Export Value (\$m)	\$ 139.0	\$ 139.4	<1%	\$ 187.2	+34%
Fresh Import Volume (t)	3,805	4,612	+21%	3,360	-27%
Fresh Import Value (\$m)	\$ 9.0	\$ 11.7	+29%	\$ 10.5	-10%
Fresh Supply (t)	97,042	98,978	+2%	95,587	-3%
Fresh Supply Wholesale Value (\$m)	\$ 230.7	\$ 221.7	-4%	\$ 240.6	+9%
Supply per Capita (kg)	3.89	3.93	<1%	3.70	-6%
Retail Supply (t)	-	91,859	-	89,334	-3%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 205.7	-	\$ 224.8	+9%
Food Service Supply (t)	-	7,119	-	6,253	-12%
Food Service Wholesale Value (\$m)	\$ -	\$ 15.9	-	\$ 15.7	-1%

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

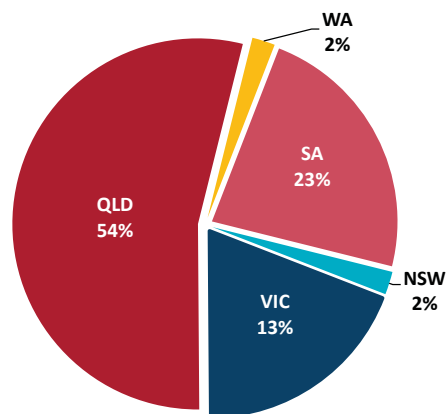
## Major Mandarins Production Areas



Source: CA



## 2019/20 Fresh Mandarins Production by State



Sources: CA

## Fresh Mandarins Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,459												
Victoria	32,857												
Queensland	93,384												
Western Australia	3,459												
South Australia	39,775												
Availability legend			High		Medium		Low						

Source: CA

## Main Mandarins Varieties

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

**Murcott** (including **Honey Murcott**), a seeded yellow-orange mandarin. Murcott mandarins accounted for **29%** of fresh production.

**Imperial mandarins**, an early season mandarin with fine smooth glossy skin and a low seed count. Imperial mandarins accounted for **24%** of fresh production for the year ending June 2020.

**Afourer**, a mostly seedless variety, accounted for **23%** of fresh production.



## Seasonality by Mandarins Variety

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

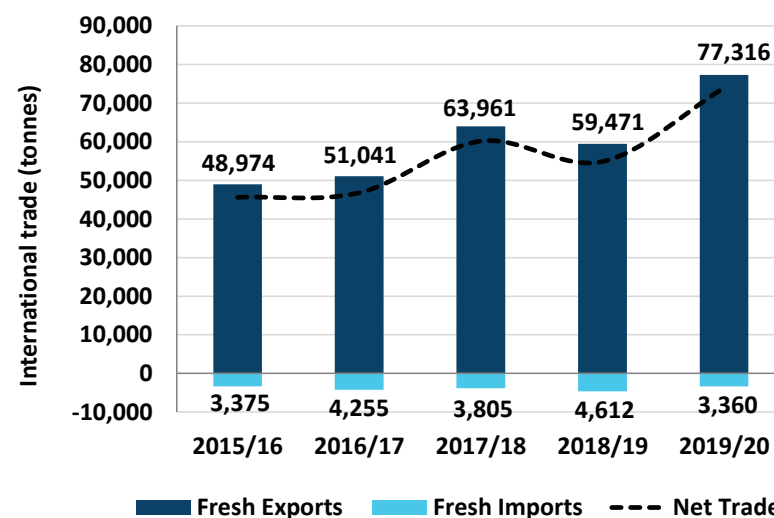
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Murcott	49,168												
Imperial	40,690												
Afourer	38,995												
<b>Others</b>	<b>40,690</b>												
<b>Processing</b>	<b>3,391</b>												
Availability legend			High		Medium		Low						

Source: CA

## Fresh Mandarins International Trade

Australia is a net exporter of fresh mandarins, over the last three years an average of **66,916 tonnes** were exported per year. Exports were lower last year due to a later season. For the year ending June 2020, Australia exported **77,316 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Mandarins International Trade



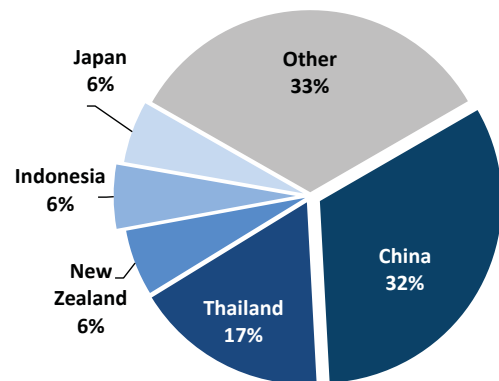
Source: GTA





Australia exports to a number of countries. For the year ending June 2020, **32%** of exported mandarins were sent to China, as profiled in the chart below.

## 2019/20 Fresh Mandarins Export by Country



Source: GTA

## Fresh Mandarins Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	1,073	1,435	1,776	Queensland	44,374	36,820	50,822
Victoria	1,039	1,425	1,004	South Australia	15,210	16,956	15,156
Western Australia	1,188	1,266	513	Victoria	3,472	4,377	9,285
Queensland	505	462	62	New South Wales	839	1,185	1,685
South Australia	-	23	4	Western Australia	42	132	369
<b>TOTAL</b>	<b>3,805</b>	<b>4,612</b>	<b>3,360</b>	<b>Other</b>	<b>23</b>	<b>1</b>	<b>-</b>
				<b>TOTAL</b>	<b>63,960</b>	<b>59,471</b>	<b>77,316</b>

## Fresh Mandarins Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	1,714	2,171	2,488	China	19,337	16,059	25,110
Egypt	1,425	2,006	780	Thailand	9,237	7,482	13,220
Israel	603	370	91	New Zealand	4,411	3,673	4,533
New Zealand	15	1	1	Indonesia	3,318	3,811	4,374
China	< 0.5	< 0.5	< 0.5	Japan	3,931	4,051	4,241
<b>Other</b>	<b>48</b>	<b>64</b>	<b>-</b>	<b>Other</b>	<b>23,726</b>	<b>24,395</b>	<b>25,838</b>
<b>TOTAL</b>	<b>3,805</b>	<b>4,612</b>	<b>3,360</b>	<b>TOTAL</b>	<b>63,960</b>	<b>59,471</b>	<b>77,316</b>

Source: GTA





## Fresh Oranges Overview

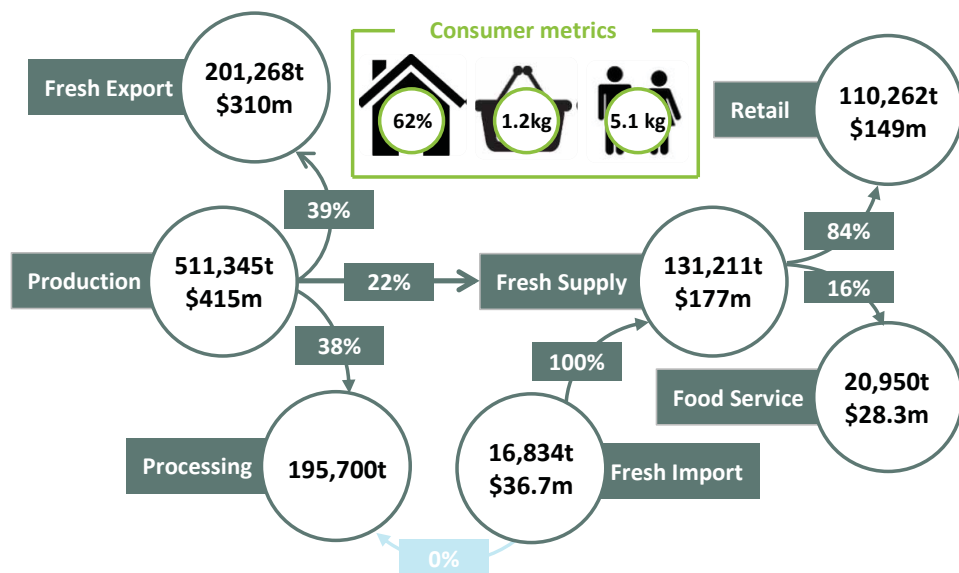
Orange production occurs predominantly in the southern states of Australia. Production is dominated by 2 main varieties; Navel oranges, available during the winter months, and Valencia oranges, available during the summer months.

For the year ending June 2020:

- **511,345 t** was produced valued at **\$414.7 m** with **38%** sent to be processed, predominantly in juicing.
- The wholesale value of the fresh supply was **\$177.1 m** with **\$149 m** distributed into retail and **\$28.3 m** into food service.
- **62%** of Australian households purchased fresh oranges, buying an average of **1.2 kg** per shopping trip.
- The supply per capita was **5.1 kg**, based on the volume supplied.



## Fresh Orange Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	526,079	528,095	<1%	511,345	-3%
Production (\$m)	\$ 373.0	\$ 398.8	+7%	\$ 414.7	+4%
Producing Trees (000 Trees)	7,709	7,652	>-1%	7,558	-1%
Fresh Export Volume (t)	190,037	188,056	-1%	201,268	+7%
Fresh Export Value (\$m)	\$ 280.1	\$ 308.1	+10%	\$ 310.1	<1%
Fresh Import Volume (t)	18,074	14,523	-20%	16,834	+16%
Fresh Import Value (\$m)	\$ 30.4	\$ 27.5	-9%	\$ 36.7	+33%
Fresh Supply (t)	140,250	139,877	>-1%	131,211	-6%
Fresh Supply Wholesale Value (\$m)	\$ 157.8	\$ 156.2	-1%	\$ 177.1	+13%
Supply per Capita (kg)	5.63	5.55	-1%	5.09	-8%
Retail Supply (t)	-	113,260	-	110,262	-3%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 126.5	-	\$ 148.9	+18%
Food Service Supply (t)	-	26,616	-	20,950	-21%
Food Service Wholesale Value (\$m)	\$ -	\$ 29.7	-	\$ 28.3	-5%

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

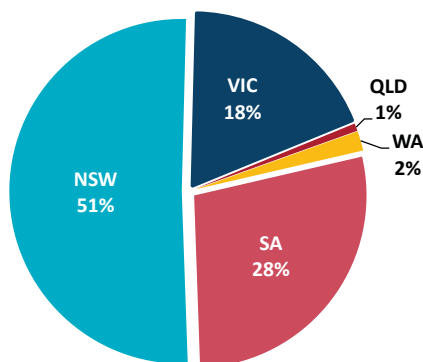
## Major Orange Production Areas



Source: CA



## 2019/20 Fresh Oranges Production by State



Source: CA

## Fresh Oranges Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	260,555												
Victoria	94,167												
Queensland	3,670												
Western Australia	9,425												
South Australia	143,528												
Availability legend			High		Medium		Low						

Source: CA

## Main Orange Varieties

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

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

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

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

## Seasonality by Orange Variety

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

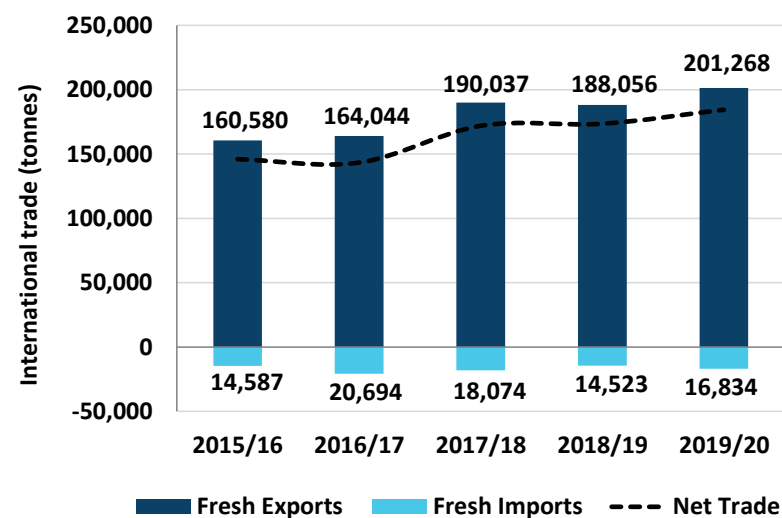
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	273,092												
Valencia	40,230												
Other	2,323												
Processing	195,700												
Availability legend			High		Medium		Low						

Source: CA

## Fresh Oranges International Trade

Australia is a net exporter of fresh oranges, growth in volumes over the last three years has in an average of **193,120 tonnes** exported per year. For the year ending June 2020, Australia exported **201,268 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Oranges International Trade

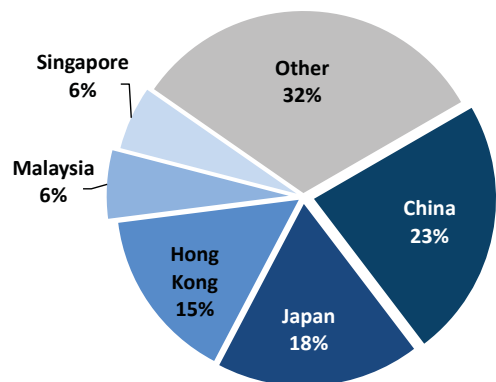


Source: GTA



For the year ending June 2020, **23%** of exported fresh oranges were sent to China, as profiled in the chart below.

## 2019/20 Fresh Oranges Exports by Country



Source: GTA

## Fresh Oranges Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	5,892	5,232	7,002	Victoria	89,127	89,138	96,869
Victoria	6,779	5,806	5,772	South Australia	68,121	60,347	65,355
Western Australia	2,744	1,700	2,260	New South Wales	27,918	34,787	34,155
Queensland	2,620	1,693	1,704	Western Australia	2,550	1,730	3,274
South Australia	39	91	96	Queensland	1,579	2,054	1,593
Other	-	< 0.5	< 0.5	Other	748	< 0.5	21
<b>TOTAL</b>	<b>18,074</b>	<b>14,523</b>	<b>16,834</b>	<b>TOTAL</b>	<b>190,043</b>	<b>188,056</b>	<b>201,268</b>

## Fresh Oranges Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	13,127	12,707	15,368	China	50,204	61,333	46,255
Egypt	4,550	1,643	1,233	Japan	37,215	33,474	36,325
Spain	72	42	147	Hong Kong	26,896	30,870	30,763
Israel	325	91	63	Malaysia	12,209	8,691	12,165
Iran	-	-	< 0.5	Singapore	8,249	7,895	11,362
Other	< 0.5	41	-	Other	55,270	45,793	64,399
<b>TOTAL</b>	<b>18,074</b>	<b>14,523</b>	<b>16,834</b>	<b>TOTAL</b>	<b>190,043</b>	<b>188,056</b>	<b>201,268</b>

Source: GTA



## Processed Oranges International Trade

For the year ending June 2020, an additional **16,067 kilolitres** of frozen orange juice was imported. Australia also imported **751 kilolitres** of fresh orange juice, while exporting **2,898 kilolitres** of fresh orange juice.



Source: GTA





## Fresh Custard Apples

### Overview

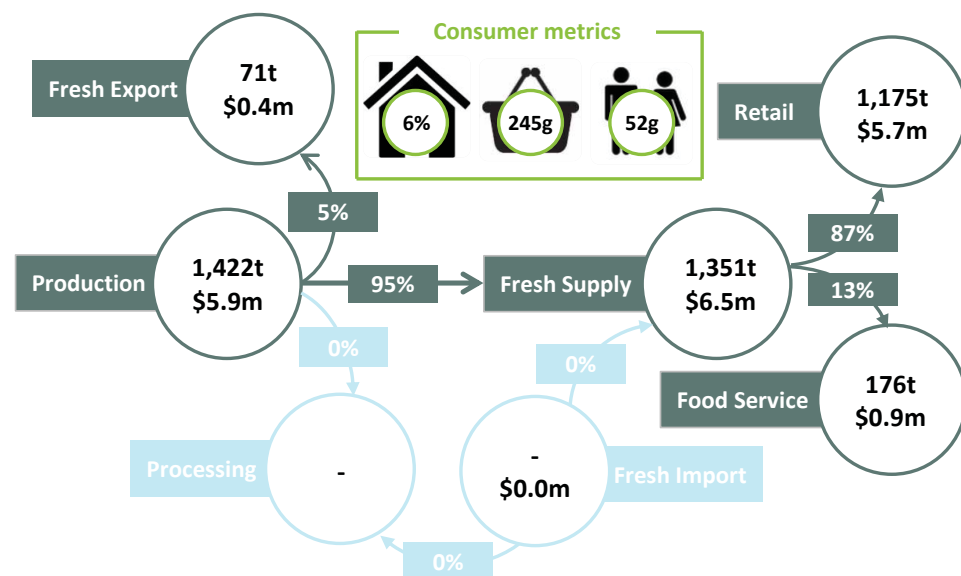
Custard apple production occurs in Queensland and northern New South Wales. The volume of custard apples that Australia imports and exports is negligible. The type of custard apple grown in Australia is unique in the world, known botanically as an atemoya.

For the year ending June 2020:

- **1,422 t** produced and valued at **\$5.9 m**.
- The wholesale value of the fresh supply was **\$6.5 m**, with **\$5.7 m** distributed into retail and **\$0.9 m** into food service.
- **6%** of Australian households purchased fresh custard apples, buying an average of **245 g** per shopping trip.
- The supply per capita was **52 g**, based on the volume supplied.



### Fresh Custard Apples Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,693	1,836	+8%	1,422	-23%
Production (\$m)	\$ 6.5	\$ 6.9	+7%	\$ 5.9	-15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	85	92	+8%	71	-23%
Fresh Export Value (\$m)	\$ 0.4	\$ 0.4	+7%	\$ 0.4	-15%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,608	1,744	+8%	1,351	-23%
Fresh Supply Wholesale Value (\$m)	\$ 7.2	\$ 7.7	+7%	\$ 6.5	-15%
Supply per Capita (kg)	0.06	0.07	+7%	0.05	-24%
Retail Supply (t)	-	1,454	-	1,175	-19%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 6.4	-	\$ 5.7	-11%
Food Service Supply (t)	-	291	-	176	-39%
Food Service Wholesale Value (\$m)	\$ -	\$ 1.3	-	\$ 0.9	-33%

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

## Major Custard Apples Production Areas

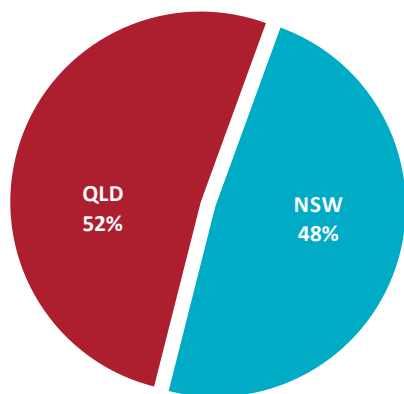


Source: CAA





## 2019/20 Fresh Custard Apple Production by State



Source: CAA

## Fresh Custard Apples Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	688												
Queensland	734												
Availability legend			High		Medium		Low						

Source: CAA





## Fresh Kiwifruit Overview

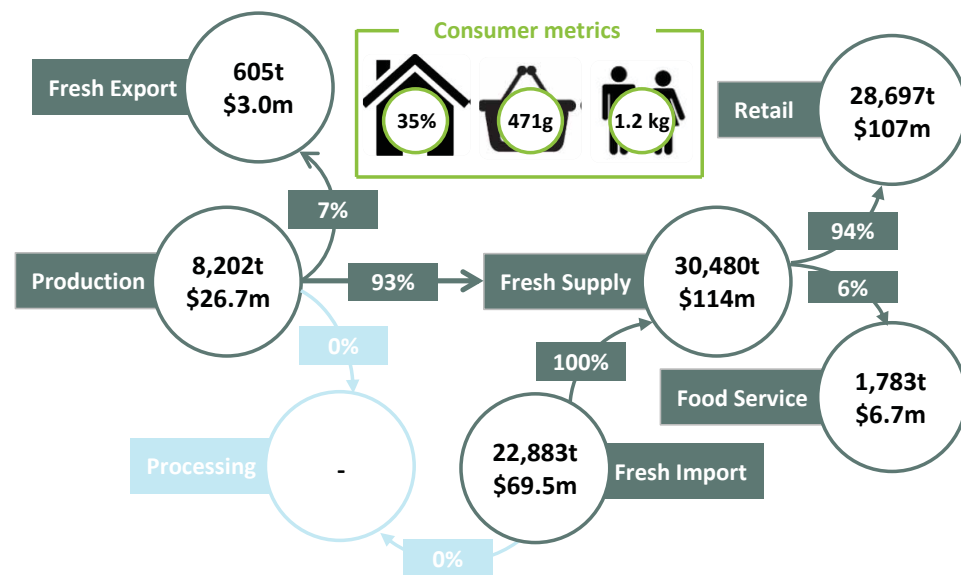
Kiwifruit production occurs predominantly in the southern states of Australia, with a larger volume being sourced from imports. The Australian season occurs between March and July. Year-round availability is made possible through imports, predominantly from New Zealand and Europe.

For the year ending June 2020:

- **8,202 t** produced and valued at **\$26.7 m**.
- The wholesale value of the fresh supply was **\$114 m**, with **\$107 m** distributed into retail and **\$6.7 m** into food service.
- **35%** of Australian households purchased fresh kiwifruit, buying an average of **471 g** of kiwifruit per shopping trip.
- The supply per capita was **1.2 kg**, based on the volume supplied.



## Fresh Kiwifruit Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,582	7,133	-26%	8,202	+15%
Production (\$m)	\$ 26.3	\$ 19.0	-28%	\$ 26.7	+41%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	1,027	660	-36%	605	-8%
Fresh Export Value (\$m)	\$ 3.6	\$ 2.1	-43%	\$ 3.0	+46%
Fresh Import Volume (t)	21,772	23,262	+7%	22,883	-2%
Fresh Import Value (\$m)	\$ 54.6	\$ 60.3	+10%	\$ 69.5	+15%
Fresh Supply (t)	30,327	29,735	-2%	30,480	+3%
Fresh Supply Wholesale Value (\$m)	\$ 96.8	\$ 93.0	-4%	\$ 114.1	+23%
Supply per Capita (kg)	1.22	1.18	-3%	1.18	<1%
Retail Supply (t)	-	27,532	+3%	28,697	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 86.1	-4%	\$ 107.4	+25%
Food Service Supply (t)	-	2,203	-	1,783	-19%
Food Service Wholesale Value (\$m)	\$ -	\$ 6.9	+10%	\$ 6.7	-3%

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

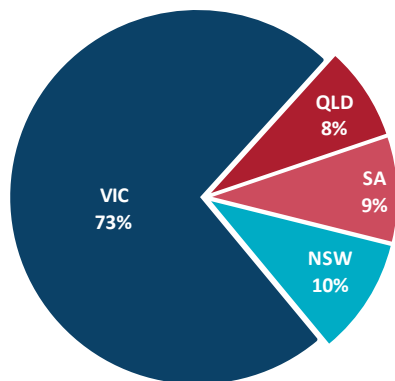
## Major Kiwifruit Production Areas



Source: (Freshlogic Analysis)



## 2019/20 Fresh Kiwifruit Production by State



Source: (Freshlogic Analysis)

## Fresh Kiwifruit Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	828												
Victoria	5,965												
Queensland	663												
South Australia	746												
Imported	22,883												
Availability legend			High		Medium		Low						None

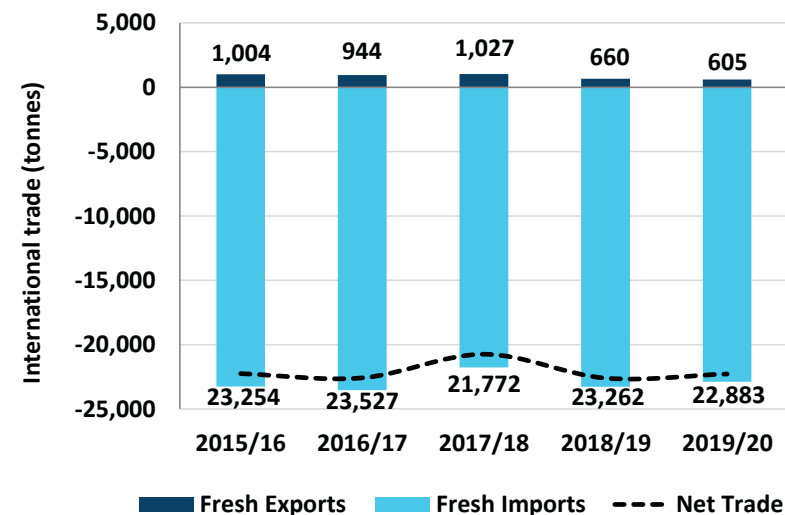
Source: (Freshlogic Analysis)

## Fresh Kiwifruit International Trade

Australia is a net importer of fresh kiwifruit, typically importing between **20,000-24,000 tonnes** per year. For the year ending June 2020, Australia imported **22,883 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.



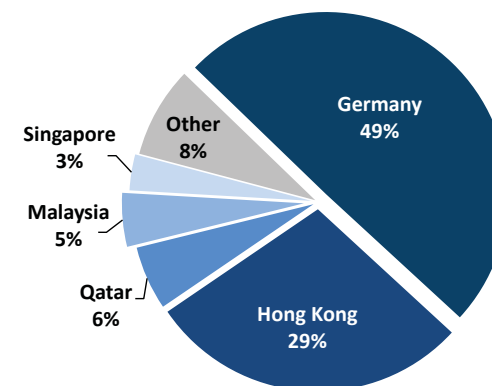
## Net Fresh Kiwifruit International Trade



Source: GTA

For the year ending June 2020, **49%** of exported fresh kiwifruit was sent to Germany, as profiled in the chart below.

## 2019/20 Fresh Kiwifruit Exports by Country



Source: GTA



## Fresh Kiwifruit Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	8,940	10,970	10,883	Victoria	796	451	321
Victoria	8,426	8,059	7,283	Queensland	94	48	79
Queensland	2,424	2,296	2,423	New South Wales	9	24	16
Western Australia	1,718	1,668	1,851	Western Australia	24	22	9
South Australia	264	269	442	Tasmania	-	< 0.5	< 0.5
<b>TOTAL</b>	<b>21,772</b>	<b>23,262</b>	<b>22,883</b>	<b>Other</b>	<b>105</b>	<b>115</b>	<b>179</b>
				<b>TOTAL</b>	<b>1,027</b>	<b>660</b>	<b>605</b>

## Fresh Kiwifruit Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New Zealand	15,354	17,070	16,765	Germany	506	398	300
Italy	6,306	6,169	6,003	Hong Kong	57	51	173
US	70	-	94	Qatar	66	36	34
France	42	23	21	Malaysia	170	29	29
<b>TOTAL</b>	<b>21,772</b>	<b>23,262</b>	<b>22,883</b>	Singapore	37	13	19
				<b>Other</b>	<b>191</b>	<b>134</b>	<b>49</b>
				<b>TOTAL</b>	<b>1,027</b>	<b>660</b>	<b>605</b>

Source: GTA





## Fresh Lychees Overview

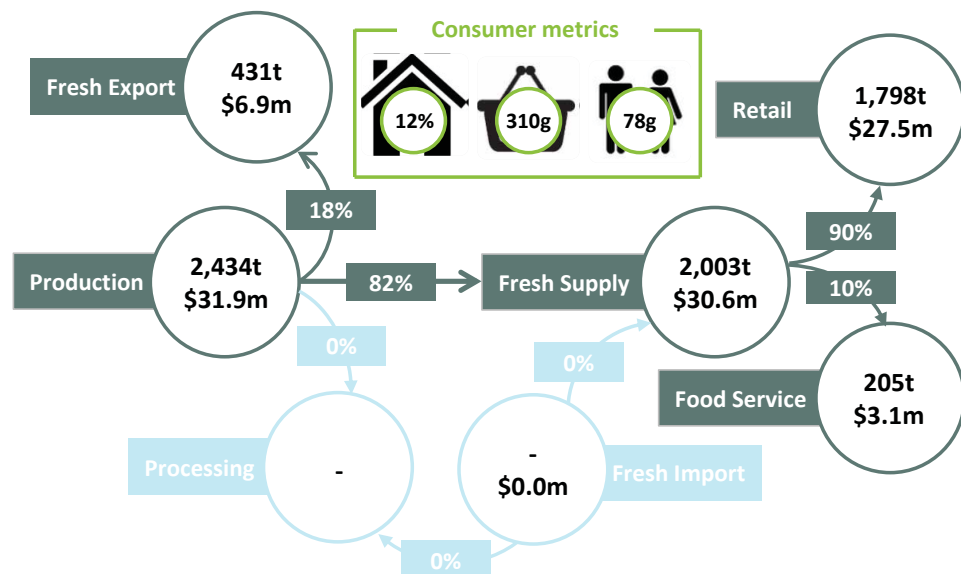
Lychee production occurs predominantly in Queensland, during the summer months.

For the year ending June 2020:

- **2,434 t** produced and valued at **\$31.9 m**.
- The wholesale value of the fresh supply was **\$30.6 m**, with **\$27.5 m** distributed into retail and **\$3.1 m** into food service.
- **12%** of Australian households purchased fresh lychees, buying an average of **310 g** per shopping trip.
- The supply per capita was **78 g**, based on the volume supplied.



## Fresh Lychees Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,633	2,733	+4%	2,434	-11%
Production (\$m)	\$ 24.0	\$ 34.4	+43%	\$ 31.9	-7%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	466	484	+4%	431	-11%
Fresh Export Value (\$m)	\$ 5.2	\$ 7.4	+43%	\$ 6.9	-7%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	2,167	2,249	+4%	2,003	-11%
Fresh Supply Wholesale Value (\$m)	\$ 23.0	\$ 33.0	+43%	\$ 30.6	-7%
Supply per Capita (kg)	0.09	0.09	+3%	0.08	-13%
Retail Supply (t)	-	2,019	-	1,798	-11%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 29.6	-	\$ 27.5	-7%
Food Service Supply (t)	-	230	-	205	-11%
Food Service Wholesale Value (\$m)	\$ -	\$ 3.4	-	\$ 3.1	-7%

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

## Major Lychee Production Areas

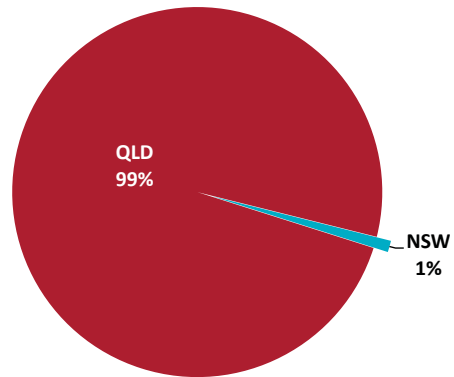


Source: ALGA





## 2019/20 Fresh Lychees Production by State



Source: ALGA

## Fresh Lychee Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	24												
Queensland	2,410												
Availability legend			High		Medium		Low						

Source: ALGA





## Fresh Mangoes Overview

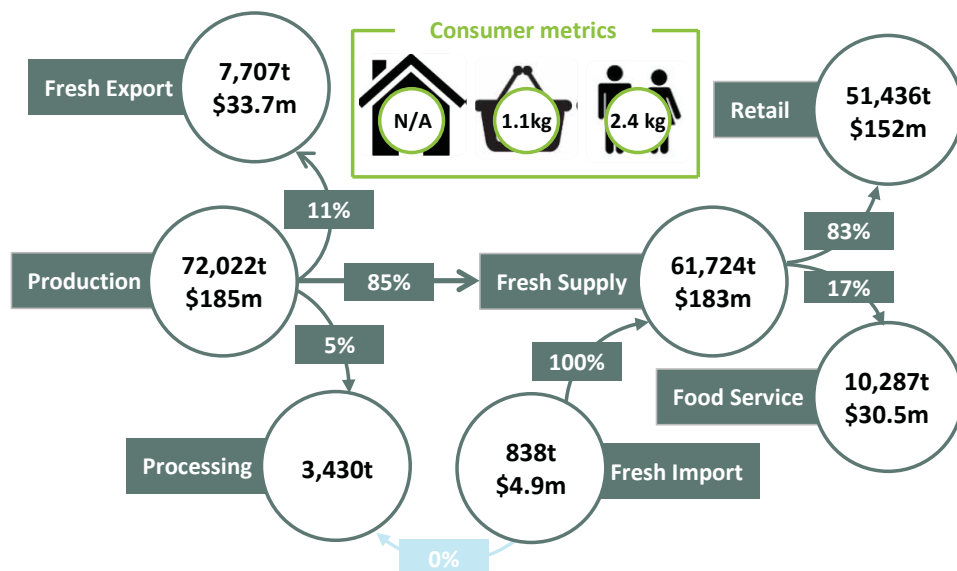
As a tropical fruit, mango production predominantly occurs in the North of Australia, particularly in Queensland and the Northern Territory.

For the year ending June 2020:

- **72,022 t** was produced valued at **\$185.2 m** while
- The wholesale value of the fresh supply was **\$183 m**, with **\$152 m** distributed into retail and **\$30.5 m** into food service.
- The supply per capita was **2.4 kg**, based on the volume supplied.



## Fresh Mangoes Supply Chain—Year Ending June 2020



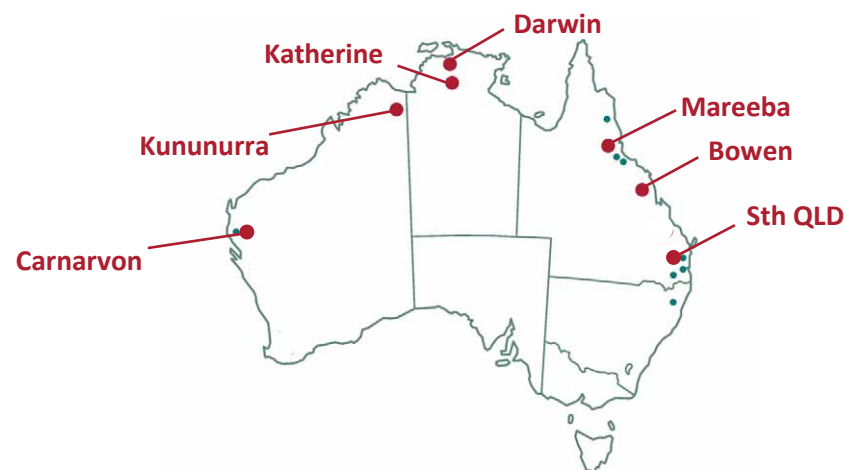
Sources: AC; Australian Mango Industry Association (AMIA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	83,314	74,920	-10%	72,022	-4%
Production (\$m)	\$ 204.3	\$ 198.6	-3%	\$ 185.2	-7%
Producing Trees (000 Trees)	1,262	-	-	-	-
Fresh Export Volume (t)	7,694	8,221	+7%	7,707	-6%
Fresh Export Value (\$m)	\$ 28.7	\$ 30.7	+7%	\$ 33.7	+10%
Fresh Import Volume (t)	866	826	-5%	838	+2%
Fresh Import Value (\$m)	\$ 4.1	\$ 4.2	+2%	\$ 4.9	+17%
Fresh Supply (t)	71,808	63,957	-11%	61,724	-3%
Fresh Supply Wholesale Value (\$m)	\$ 209.8	\$ 201.5	-4%	\$ 183.0	-9%
Supply per Capita (kg)	2.88	2.54	-12%	2.39	-6%
Retail Supply (t)	-	52,173	-	51,436	-1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 164.4	-	\$ 152.5	-7%
Food Service Supply (t)	-	11,785	-	10,287	-13%
Food Service Wholesale Value (\$m)	\$ -	\$ 37.1	-	\$ 30.5	-18%

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

## Major Mango Production Areas

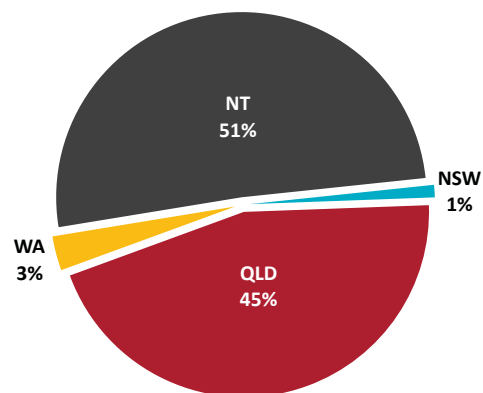


Source: AMIA



## Mangoes

### 2019/20 Fresh Mangoes Production by State



Source: AMIA

### Fresh Mangoes Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	781												
Queensland	32,410												
Western Australia	2,161												
Northern Territory	36,670												
Availability legend			High		Medium		Low						

Source: AMIA

### Main Mango Varieties

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

**Kensington Pride**, also known as KP, is the most common mango variety in Australia, and accounted for **43%** of fresh production.

**Calypso**, a mango with yellowy orange skin and a deep pink blush, accounted for **25%** of fresh production.

**R2E2** mangoes accounted for **19%** of fresh production.

**Honey Gold** mangoes accounted for **8%** of fresh production.

Other mangoes, such as Keitt, Tommy Atkins, Palmer and Nam Dok Mai, accounted for **4%** of fresh production.



## Mangoes

### Seasonality by Mango Variety

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

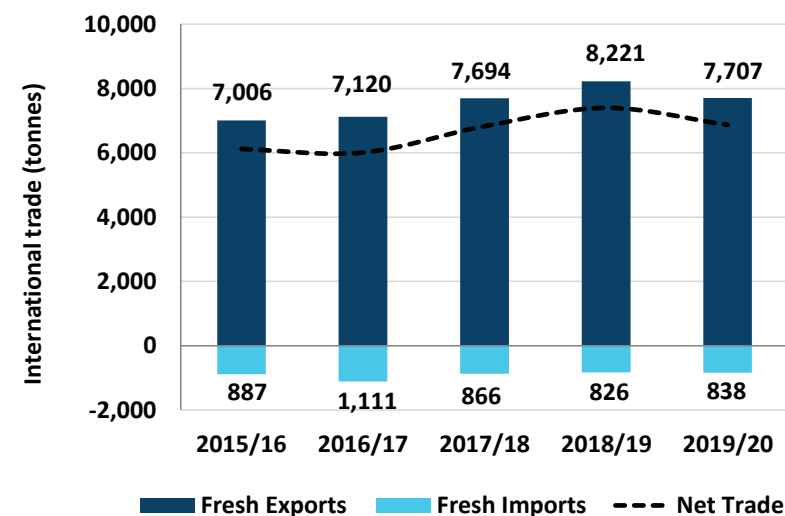
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Kensington Pride	29,529												
Calypso	17,285												
R2E2	12,964												
Honey gold	5,762												
Other	3,052												
Processing	3,430												
Availability legend			High		Medium		Low						

Source: AMIA

### Fresh Mangoes International Trade

Australia is a net exporter of fresh mangoes, with exports growing in recent years. For the year ending June 2020, Australia exported **7,707 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

#### Net Fresh Mangoes International Trade

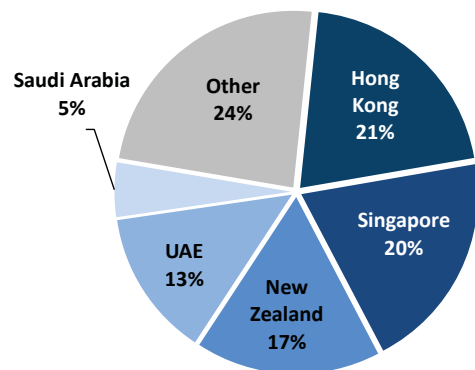


Source: GTA



For the year ending June 2020, **21%** of exported fresh mangoes were sent to Hong Kong, as profiled in the chart below.

## 2019/20 Fresh Mangoes Exports by Country



Source: GTA

## Fresh Mangoes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	283	397	428	Queensland	5,583	5,755	5,111
Victoria	377	268	213	New South Wales	420	802	1,177
Western Australia	189	115	168	Northern Territory	1,300	1,303	1,089
Queensland	16	40	27	Victoria	298	301	265
Northern Territory	-	1	2	Western Australia	78	36	49
<b>Other</b>	<b>1</b>	<b>5</b>	<b>&lt; 0.5</b>	<b>Other</b>	<b>14</b>	<b>24</b>	<b>15</b>
<b>TOTAL</b>	<b>866</b>	<b>826</b>	<b>838</b>	<b>TOTAL</b>	<b>7,694</b>	<b>8,221</b>	<b>7,707</b>

## Fresh Mangoes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Thailand	351	294	249	Hong Kong	2,518	1,973	1,589
Vietnam	78	61	146	Singapore	1,759	1,869	1,544
Mexico	224	171	102	New Zealand	1,107	1,179	1,304
Brazil	-	42	98	UAE	844	910	1,037
India	135	178	94	Saudi Arabia	264	340	383
<b>Other</b>	<b>77</b>	<b>80</b>	<b>-</b>	<b>Other</b>	<b>1,202</b>	<b>1,949</b>	<b>1,850</b>
<b>TOTAL</b>	<b>866</b>	<b>826</b>	<b>838</b>	<b>TOTAL</b>	<b>7,694</b>	<b>8,221</b>	<b>7,707</b>





## Fresh Melons Overview

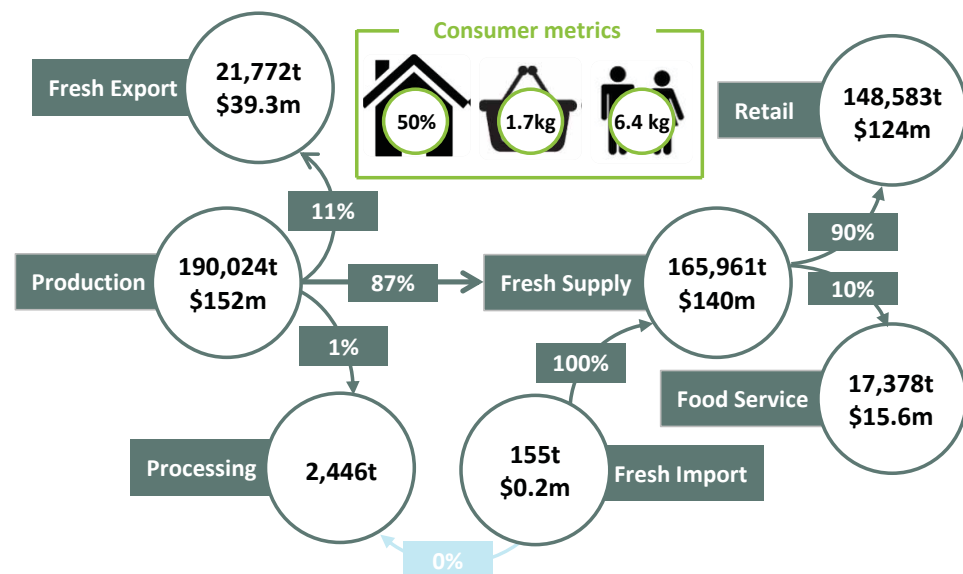
Pages 146-147 profile total melon fruit production and trade. It combines information on watermelons and muskmelons. The following pages profile each melon category in more detail.

For the year ending June 2020:

- **190,024 t** produced and valued at **\$152.1 m**.
- The wholesale value of the fresh supply was **\$139.5 m**, with **\$124 m** distributed into retail and **\$15.6 m** into food service.
- **50%** of Australian households purchased fresh melons, buying an average of **1.7 kg** per shopping trip.
- The supply per capita was **6.4 kg**, based on the volume supplied.



## Fresh Melons Supply Chain—Year Ending June 2020



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

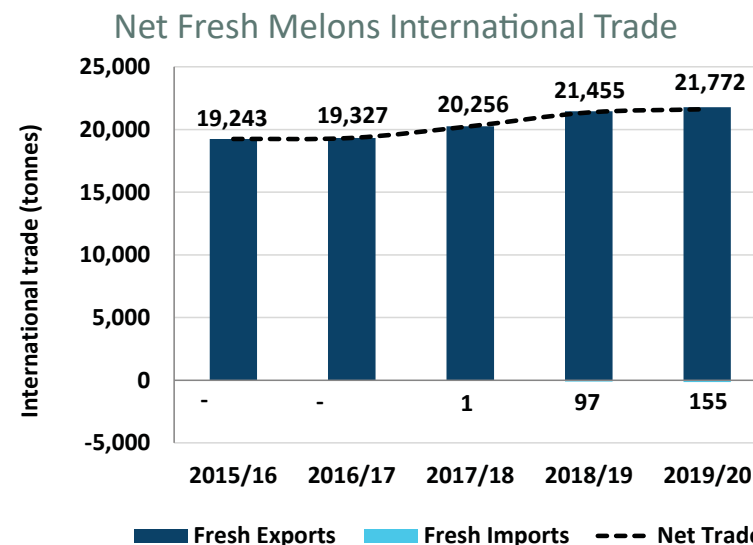


Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	215,503	218,371	+1%	190,024	-13%
Production (\$m)	\$ 124.2	\$ 144.6	+16%	\$ 152.1	+5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	20,256	21,455	+6%	21,772	+1%
Fresh Export Value (\$m)	\$ 31.6	\$ 37.0	+17%	\$ 39.3	+6%
Fresh Import Volume (t)	1	97	>100%	155	+59%
Fresh Import Value (\$m)	< \$0.1	\$ 0.2	>100%	\$ 0.2	+11%
Fresh Supply (t)	192,673	194,362	<1%	165,961	-15%
Fresh Supply Wholesale Value (\$m)	\$ 114.4	\$ 133.0	+16%	\$ 139.5	+5%
Supply per Capita (kg)	7.73	7.71	>-1%	6.43	-17%
Retail Supply (t)	-	160,687	-	148,583	-8%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 108.6	-	\$ 123.9	+14%
Food Service Supply (t)	-	33,676	-	17,378	-48%
Food Service Wholesale Value (\$m)	\$ -	\$ 24.5	-	\$ 15.6	-36%

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

\*Note: Production and trade figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

## Fresh Melons International Trade







## Fresh Muskmelons Overview

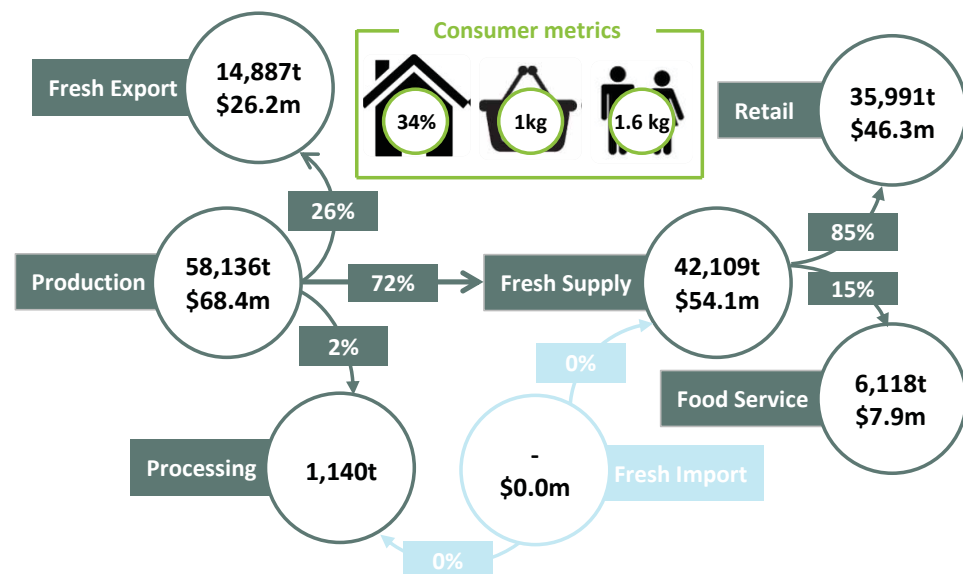
Muskmelons include **rockmelons** and **honey dew melons**. Production occurs across most states of Australia.

For the year ending June 2020:

- **58,136 t** produced and valued at **\$68.4 m**.
- The wholesale value of the fresh supply was **\$54.1 m**, with **\$46.3 m** distributed into retail and **\$7.9 m** into food service.
- **34%** of Australian households purchased fresh muskmelons, buying an average of **1 kg** per shopping trip.
- The supply per capita was **1.6 kg**, based on the volume supplied.



## Fresh Muskmelons Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	45,477	50,373	+11%	58,136	+15%
Production (\$m)	\$ 49.5	\$ 62.8	+27%	\$ 68.4	+9%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	13,540	14,143	+4%	14,887	+5%
Fresh Export Value (\$m)	\$ 23.2	\$ 24.3	+5%	\$ 26.2	+8%
Fresh Import Volume (t)	1	21	>100%	-	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	\$ -	-100%
Fresh Supply (t)	31,046	35,262	+14%	42,109	+19%
Fresh Supply Wholesale Value (\$m)	\$ 35.0	\$ 49.5	+41%	\$ 54.1	+9%
Supply per Capita (kg)	1.25	1.40	+12%	1.63	+17%
Retail Supply (t)	-	27,549	-	35,991	+31%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 38.7	-	\$ 46.3	+20%
Food Service Supply (t)	-	7,714	-	6,118	-21%
Food Service Wholesale Value (\$m)	\$ -	\$ 10.8	-	\$ 7.9	-27%

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

\*Note: Production and trade figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

## Major Muskmelon Production Areas

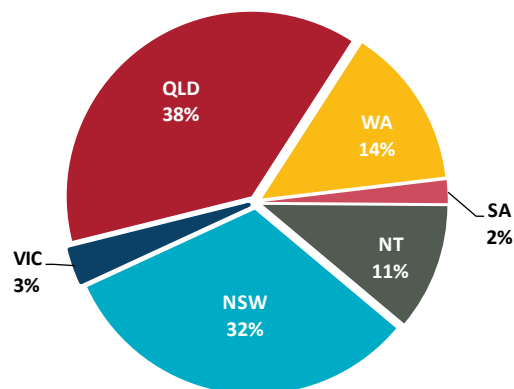


Source: AMA



## Melons—Muskmelons

### 2019/20 Fresh Muskmelons Production by State



Sources: AMA

### Fresh Muskmelons Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	18,603												
Victoria	1,744												
Queensland	22,092												
Western Australia	8,139												
South Australia	1,163												
Northern Territory	6,395												
Availability legend			High		Medium		Low						

Source: AMA

## Main Muskmelon Varieties

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

**Rockmelons**, a round melon with netted greyish-green skin and an orange flesh. Rockmelons accounted for **85%** of fresh production for the year ending June 2020.

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

Other muskmelon varieties include the newly introduced **Piel de Sapo** variety, accounted for **1%** of fresh production.



## Melons—Muskmelons

### Seasonality by Muskmelon Variety

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

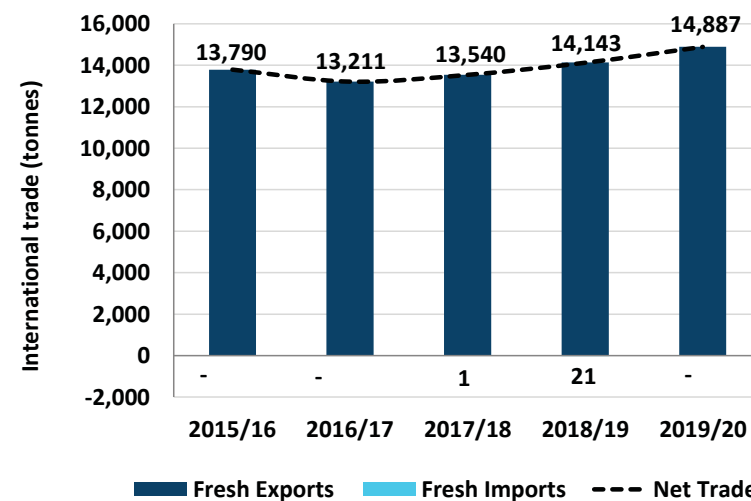
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	49,415												
Honeydew	8,139												
Piel de Sapo	581												
Availability legend			High		Medium		Low						

Source: AMA

## Fresh Muskmelons International Trade

Australia is a net exporter of fresh muskmelons, typically exporting between **13,000-15,000 tonnes** per year. For the year ending June 2020, Australia exported **14,887 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Muskmelons International Trade

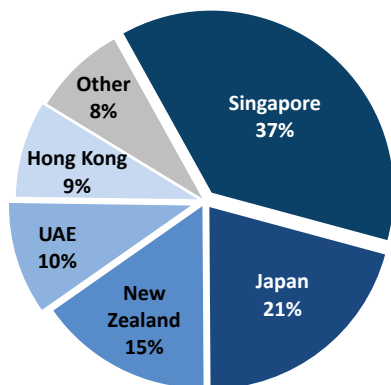


Source: GTA



For the year ending June 2020, **37%** of exported fresh muskmelons were sent to Singapore, as profiled in the chart below.

2019/20 Fresh Muskmelons Exports by State



Source: GTA

Fresh Muskmelons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Queensland	1	21	-	Queensland	7,663	7,399	7,945
<b>TOTAL</b>	<b>1</b>	<b>21</b>	<b>-</b>	Western Australia	2,564	3,357	3,845
				New South Wales	2,562	2,972	2,628
				Victoria	414	365	443
				South Australia	179	50	13
				<b>Other</b>	<b>161</b>	<b>-</b>	<b>12</b>
				<b>TOTAL</b>	<b>13,543</b>	<b>14,143</b>	<b>14,887</b>

Fresh Muskmelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New Zealand	1	2	-	Singapore	5,010	5,682	5,546
<b>Other</b>	<b>-</b>	<b>19</b>	<b>-</b>	Japan	498	958	3,082
<b>TOTAL</b>	<b>1</b>	<b>21</b>	<b>-</b>	New Zealand	3,259	2,949	2,289
				UAE	2,928	2,294	1,481
				Hong Kong	857	1,256	1,266
				<b>Other</b>	<b>992</b>	<b>1,005</b>	<b>1,223</b>
				<b>TOTAL</b>	<b>13,543</b>	<b>14,143</b>	<b>14,887</b>

Source: GTA





## Fresh Watermelons

### Overview

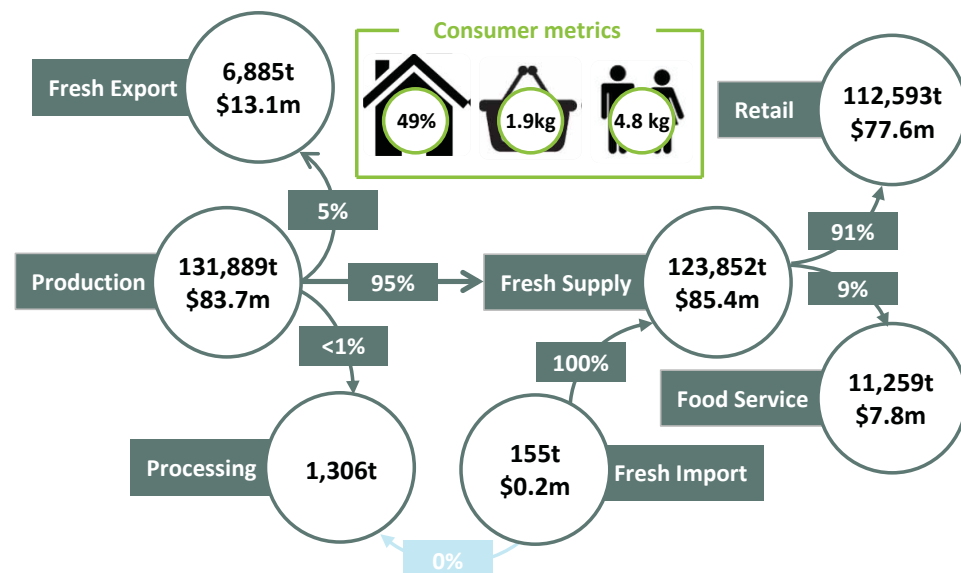
Watermelon production occurs across Australia, but predominantly in the northern states. The majority of production is destined for the fresh market, with limited volumes of export.

For the year ending June 2020:

- **131,889 t** produced and valued at **\$83.7 m**.
- The wholesale value of the fresh supply was **\$85.4 m**, with **\$77.6 m** distributed into retail and **\$7.8 m** into food service.
- **49%** of Australian households purchased fresh watermelons, buying an average of **1.9 kg** per shopping trip.
- The supply per capita was **4.8 kg**, based on the volume supplied.



### Fresh Watermelons Supply Chain—Year Ending June 2020



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

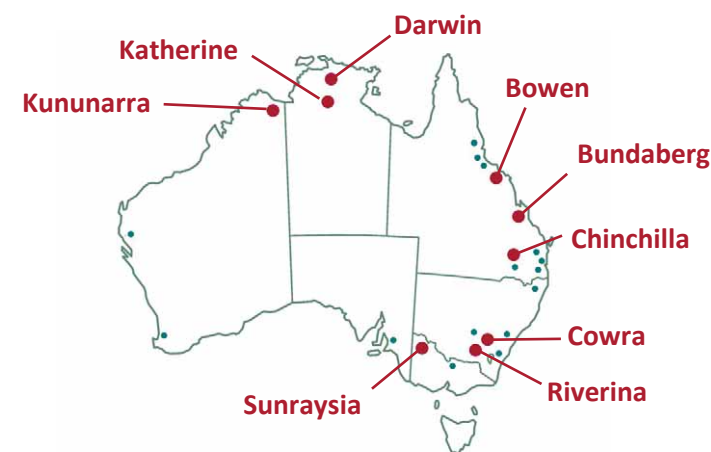


Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	170,026	167,998	-1%	131,889	-21%
Production (\$m)	\$ 74.7	\$ 81.9	+10%	\$ 83.7	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	6,716	7,312	+9%	6,885	-6%
Fresh Export Value (\$m)	\$ 8.4	\$ 12.7	+51%	\$ 13.1	+3%
Fresh Import Volume (t)	-	77	-	155	>100%
Fresh Import Value (\$m)	\$ -	\$ 0.1	-	\$ 0.2	+65%
Fresh Supply (t)	161,627	159,100	-2%	123,852	-22%
Fresh Supply Wholesale Value (\$m)	\$ 79.4	\$ 83.5	+5%	\$ 85.4	+2%
Supply per Capita (kg)	6.48	6.31	-3%	4.80	-24%
Retail Supply (t)	-	133,138	-	112,593	-15%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 69.9	-	\$ 77.6	+11%
Food Service Supply (t)	-	25,962	-	11,259	-57%
Food Service Wholesale Value (\$m)	\$ -	\$ 13.6	-	\$ 7.8	-43%

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

\*Note: Production and trade figures have been modified from those published in the previous edition of the handbook (2018/19 edition).

## Major Watermelon Production Areas

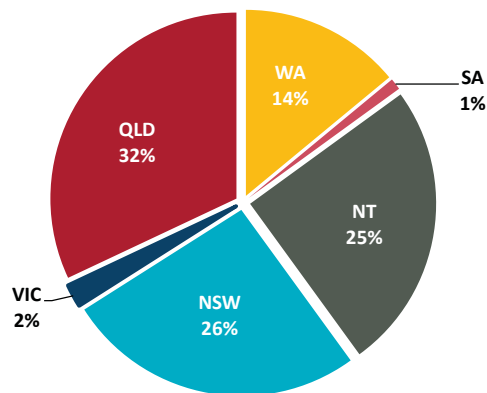


Source: AMA



## Melons—Watermelons

### 2019/20 Fresh Watermelons Production by State



Source: AMA

### Fresh Watermelons Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	34,291												
Victoria	2,638												
Queensland	42,204												
Western Australia	18,464												
South Australia	1,319												
Northern Territory	32,972												
Availability legend		High		Medium		Low		None					

Source: AMA

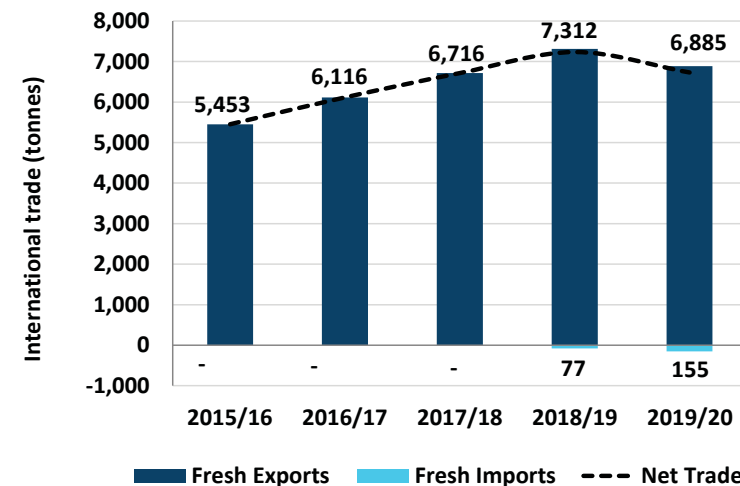
### Fresh Watermelons International Trade

Australia is a net exporter of fresh watermelons, with exports growing in recent years. For the year ending June 2020, Australia exported **6,885** tonnes. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Melons—Watermelons



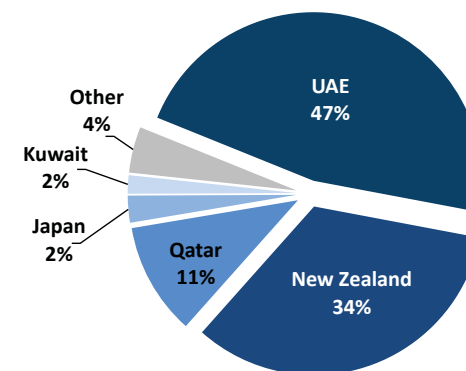
### Net Fresh Watermelons International Trade



Source: GTA

For the year ending June 2020, **47%** of exported fresh watermelons were sent to United Arab Emirates, as profiled in the chart below.

### 2019/20 Fresh Watermelons Exports by Country



Source: GTA





## Fresh Watermelons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	-	-	114	Queensland	4,782	5,160	4,571
Queensland	-	77	22	New South Wales	848	945	843
Victoria	-	-	19	Western Australia	278	438	799
<b>TOTAL</b>	-	<b>77</b>	<b>155</b>	Victoria	484	346	299
				Northern Territory	330	423	279
				<b>Other</b>	<b>6</b>	<b>&lt; 0.5</b>	<b>94</b>
				<b>TOTAL</b>	<b>6,728</b>	<b>7,312</b>	<b>6,885</b>

## Fresh Watermelons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
<b>Other</b>	-	<b>77</b>	-	UAE	3,330	4,196	3,226
<b>TOTAL</b>	-	<b>77</b>	<b>155</b>	New Zealand	2,744	2,196	2,314
				Qatar	345	465	742
				Japan	-	5	178
				Kuwait	114	188	122
				<b>Other</b>	<b>195</b>	<b>261</b>	<b>304</b>
				<b>TOTAL</b>	<b>6,728</b>	<b>7,312</b>	<b>6,885</b>

Source: GTA





## Fresh Nashi Overview

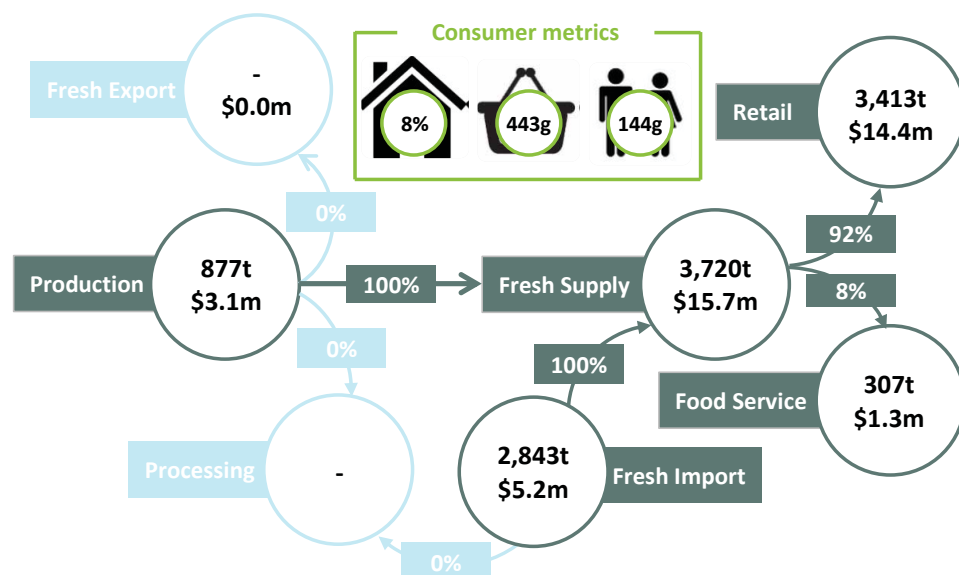
Nashi fruit, and other Asian pears as they are sometimes known, are grown predominantly in the Goulburn Valley region of Victoria. Nashi fruit grown in Australia are all grown for the fresh market.

For the year ending June 2020:

- **877 t** was produced and valued at **\$3.1 m**.
- The wholesale value of the fresh supply was **\$15.7 m** with **\$14.4 m** distributed into retail and **\$1.3 m** into food service.
- **8%** of Australian households purchased fresh nashi, buying an average of **443 g** per shopping trip.
- The supply per capita was **144 g**, based on the volume supplied.



## Fresh Nashi Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,370	1,384	-42%	877	-37%
Production (\$m)	\$ 7.0	\$ 4.2	-40%	\$ 3.1	-26%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	1,826	1,345	-26%	2,843	>100%
Fresh Import Value (\$m)	\$ 3.1	\$ 2.8	-10%	\$ 5.2	+83%
Fresh Supply (t)	4,195	2,729	-35%	3,720	+36%
Fresh Supply Wholesale Value (\$m)	\$ 14.7	\$ 9.9	-33%	\$ 15.7	+59%
Supply per Capita (kg)	0.17	0.11	-36%	0.14	+33%
Retail Supply (t)	-	2,458	-	3,413	+39%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 8.9	-	\$ 14.4	+62%
Food Service Supply (t)	-	271	-	307	+13%
Food Service Wholesale Value (\$m)	\$ -	\$ 1.0	-	\$ 1.3	+32%

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

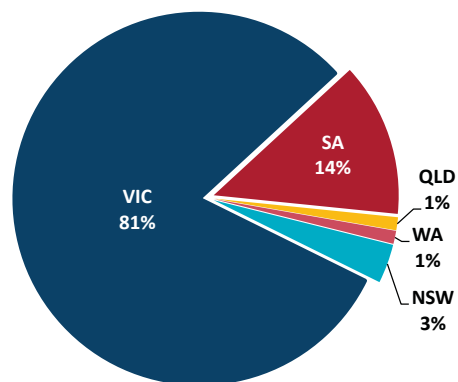
## Major Nashi Production Areas



Source: ANGA



## 2019/20 Fresh Nashi Production by State



Source: ANGA

## Fresh Nashi Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	30												
Victoria	709												
South Australia	118												
Queensland	10												
Western Australia	10												
Availability legend			High			Medium			Low			None	

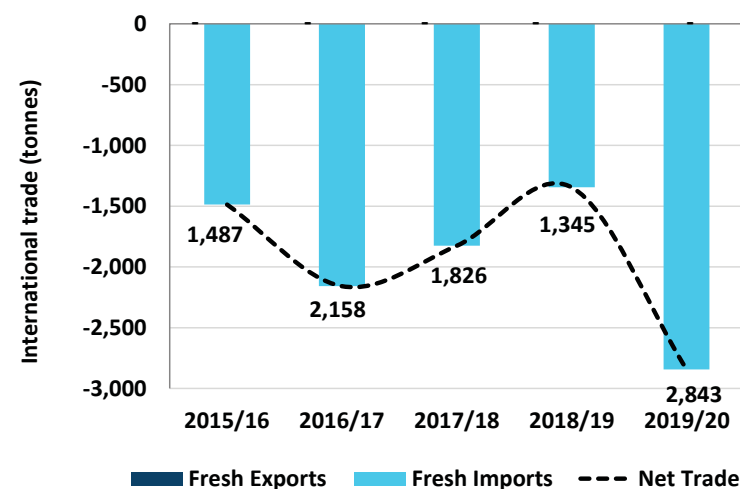
Source: ANGA



## Fresh Nashi International Trade

Australia is a net importer of fresh nashi. For the year ending June 2020, Australia imported **2,843** tonnes. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Nashi International Trade



Source: GTA



## Fresh Nashi Imports by State

Imports by state destination (Tonnes)			
Year Ending June	2018	2019	2020
New South Wales	890	688	1,426
Victoria	771	512	1,156
Queensland	165	99	158
Western Australia	-	47	103
<b>TOTAL</b>	<b>1,826</b>	<b>1,345</b>	<b>2,843</b>

## Fresh Nashi Imports by Country

Imports by country (Tonnes)			
Year Ending June	2018	2019	2020
China	1,638	1,179	2,627
Sth. Korea	187	167	216
<b>Other</b>	<b>-</b>	<b>&lt; 0.5</b>	<b>-</b>
<b>TOTAL</b>	<b>1,826</b>	<b>1,345</b>	<b>2,843</b>

Source: GTA





## Fresh Passionfruit Overview

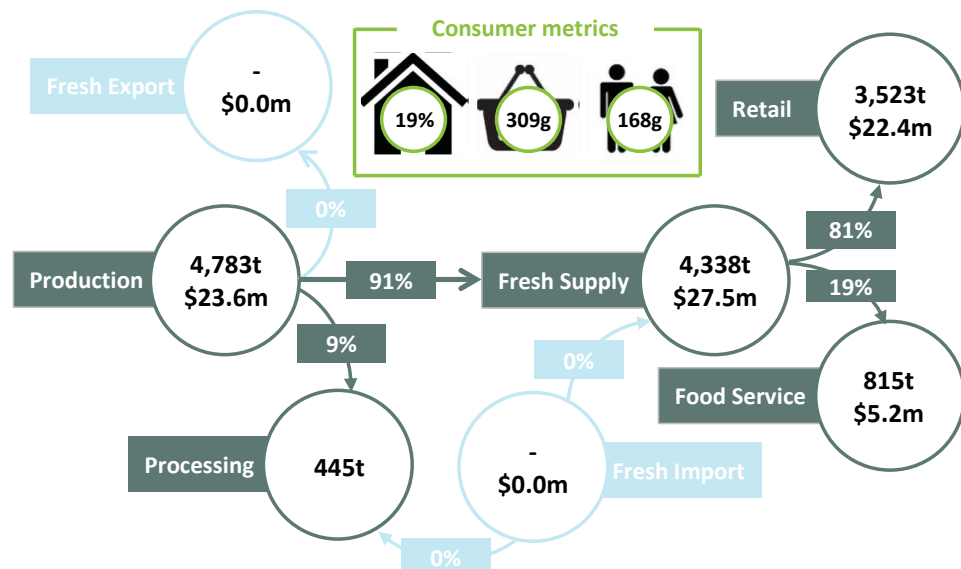
Passionfruit is grown in the north of Australia, with the majority grown in Queensland. The majority of Australian production is destined for the fresh market.

For the year ending June 2020:

- **4,783 t** produced and valued at **\$23.6 m**.
- The wholesale value of the fresh supply was **\$27.5 m**, with **\$22.4 m** distributed into retail and **\$5.2 m** into food service.
- **19%** of Australian households purchased fresh passionfruit, buying an average of **309 g** per shopping trip.
- The supply per capita was **168 g**, based on the volume supplied.



## Fresh Passionfruit Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	4,790	4,469	-7%	4,783	+7%
Production (\$m)	\$ 16.8	\$ 19.4	+16%	\$ 23.6	+21%
Producing Vines (000 Vines)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	4,488	4,216	-6%	4,338	+3%
Fresh Supply Wholesale Value (\$m)	\$ 19.7	\$ 22.8	+16%	\$ 27.5	+21%
Supply per Capita (kg)	0.18	0.17	-7%	0.17	<1%
Retail Supply (t)	-	3,319	+3%	3,523	+6%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 17.9	-4%	\$ 22.4	+25%
Food Service Supply (t)	-	896	-	815	-9%
Food Service Wholesale Value (\$m)	\$ -	\$ 4.8	+10%	\$ 5.2	+7%

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

## Major Passionfruit Production Areas

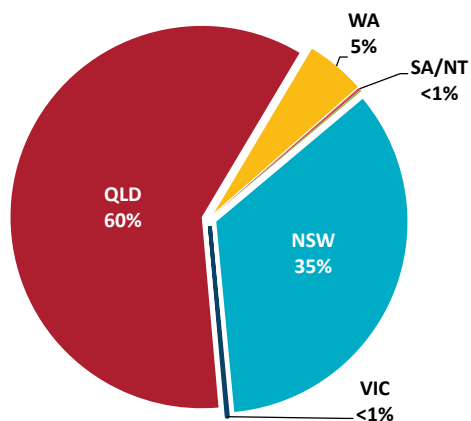


Source: PAI





## 2019/20 Fresh Passionfruit Production by State



Source: PAI

## Fresh Passionfruit Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,657												
Victoria	5												
Queensland	2,871												
Western Australia	239												
SA/NT	11												
Availability legend			High		Medium		Low					None	

Source: PAI



Photo credit: James Stretch 2016



## Fresh Papaya/Pawpaw Overview

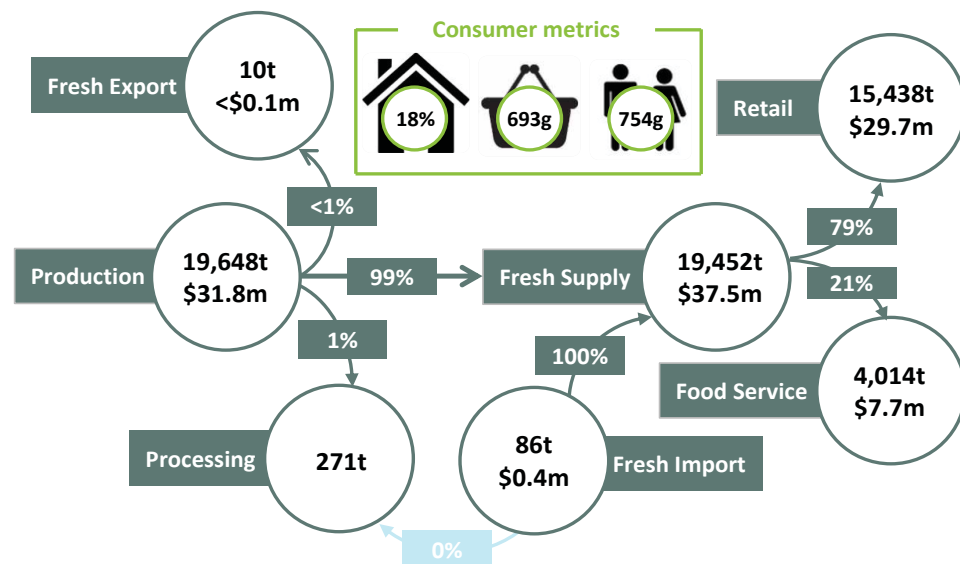
As a tropical fruit, red papaya and yellow pawpaw production predominantly occurs in the North of Australia, in Queensland, as well as some production in the Northern Territory and Western Australia.

For the year ending June 2020:

- **19,648 t** produced and valued at **\$31.8 m**.
- The wholesale value of the fresh supply was **\$37.5 m**, with **\$29.7 m** distributed in retail and **\$7.7 m** into food service.
- **18%** of Australian households purchased fresh red papaya and yellow pawpaw, buying an average of **693 g** per shopping trip.
- The supply per capita was **754 g**, based on the volume supplied.



## Fresh Papaya/Pawpaw Supply Chain—Year Ending June 2020



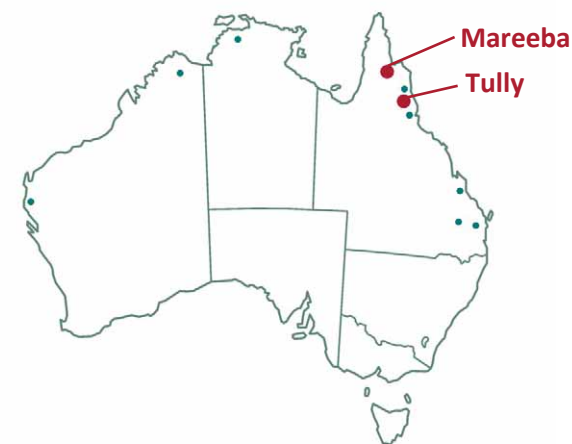
Sources: AC; CFVIWA; GTA; Papaya Australia (PA); MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	16,196	14,921	-8%	19,648	+32%
Production (\$m)	\$ 31.4	\$ 27.5	-12%	\$ 31.8	+15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	16	45	>100%	10	-78%
Fresh Export Value (\$m)	< \$0.1	\$ 0.2	>100%	< \$0.1	-87%
Fresh Import Volume (t)	131	40	-70%	86	>100%
Fresh Import Value (\$m)	\$ 0.4	\$ 0.2	-64%	\$ 0.4	>100%
Fresh Supply (t)	16,087	14,710	-9%	19,452	+32%
Fresh Supply Wholesale Value (\$m)	\$ 37.2	\$ 32.3	-13%	\$ 37.5	+16%
Supply per Capita (kg)	0.65	0.58	-10%	0.75	+29%
Retail Supply (t)	-	11,674	-	15,438	+32%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 25.6	-	\$ 29.7	+16%
Food Service Supply (t)	-	3,035	-	4,014	+32%
Food Service Wholesale Value (\$m)	\$ -	\$ 6.7	-	\$ 7.7	+16%

CFVIWA; GTA; PA; MP & DD (Freshlogic Analysis)

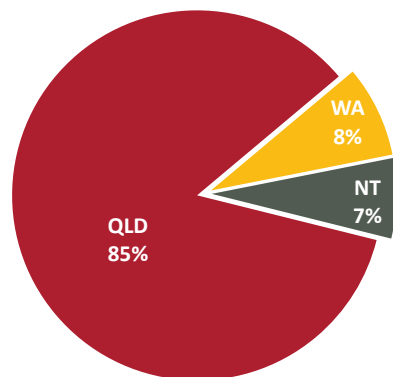
## Major Papaya/Pawpaw Production Areas



Source: PA



## 2019/20 Fresh Papaya/Pawpaw Production by State



Source: PA

## Fresh Papaya/Pawpaw Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	16,700												
Western Australia	1,572												
Northern Territory	1,375												
Imported	86												
Availability legend		High		Medium		Low		None					

Source: PA

## Main Categories

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

**Red papaya** accounted for **85%** of fresh production.

**Yellow pawpaw** accounted for **15%** of fresh production.

## Seasonality by category

Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Papaya	16,700												
Pawpaw	2,947												
Availability legend		High		Medium		Low		None					

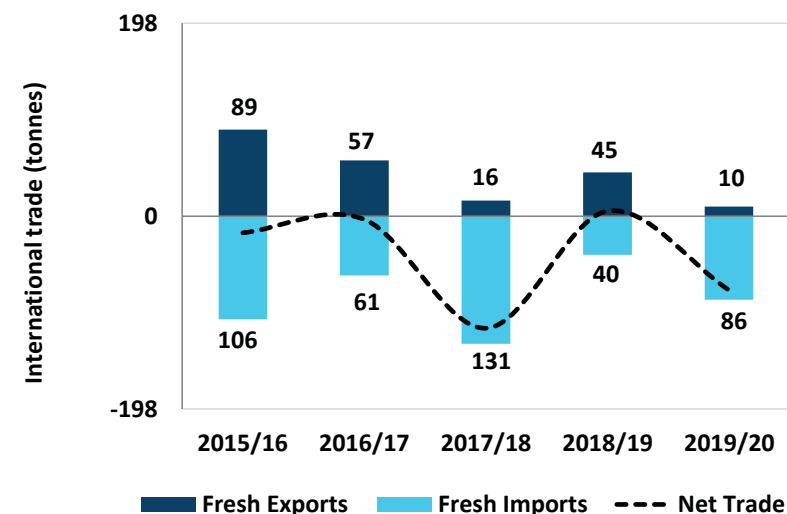
Source: PA



## Fresh Papaya/Pawpaw International Trade

Australia is a net importer of fresh red papaya and yellow pawpaw, typically importing between **40-130 tonnes** per year. For the year ending June 2020, Australia imported **86 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Papaya/Pawpaw International Trade

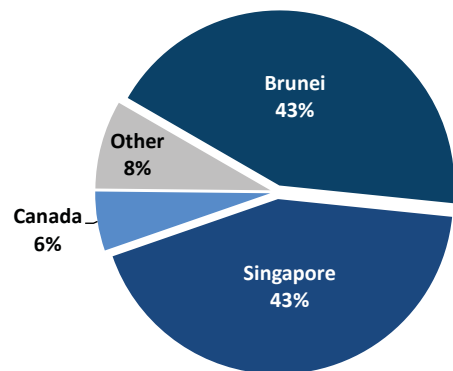


Source: GTA



For the year ending June 2020, **43%** of exported fresh red papaya and yellow pawpaw were sent to Brunei and Singapore, as profiled in the chart below.

## 2019/20 Fresh Papaya/Pawpaw Exports by Country



Source: GTA

## Papaya/Pawpaw Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Victoria	128	40	85	Victoria	< 0.5	-	4
Western Australia	-	-	< 0.5	New South Wales	< 0.5	< 0.5	3
New South Wales	3	-	-	Queensland	16	42	2
<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>&lt; 0.5</b>	<b>Other</b>	<b>&lt; 0.5</b>	<b>3</b>	<b>-</b>
<b>TOTAL</b>	<b>131</b>	<b>40</b>	<b>86</b>	<b>TOTAL</b>	<b>16</b>	<b>45</b>	<b>10</b>

## Papaya/Pawpaw Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Fiji	103	39	85	Brunei	-	-	4
Philippines	-	-	< 0.5	Singapore	< 0.5	< 0.5	4
Thailand	28	1	-	Canada	-	1	1
<b>TOTAL</b>	<b>131</b>	<b>40</b>	<b>86</b>	<b>Qatar</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>&lt; 0.5</b>
				<b>Hong Kong</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
				<b>Other</b>	<b>16</b>	<b>44</b>	<b>1</b>
				<b>TOTAL</b>	<b>16</b>	<b>45</b>	<b>10</b>

Source: GTA





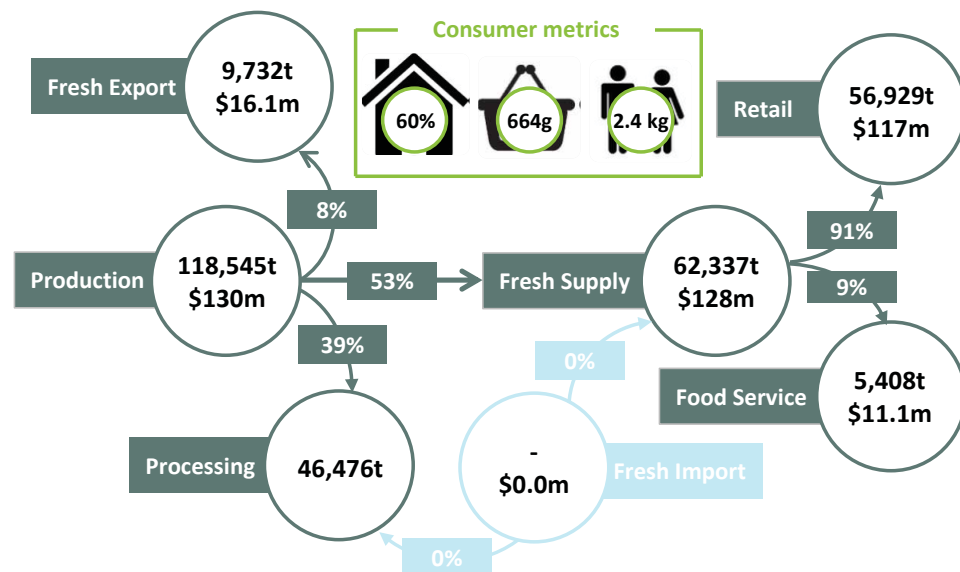
## Fresh Pears Overview

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

For the year ending June 2020:

- **118,545 t** was produced valued at **\$130 m**, with **39%** sent to be processed.
- The wholesale value of fresh supply was **\$128 m**, with **\$117 m** distributed into retail and **\$11.1 m** distributed into food service.
- **60%** of Australian households purchased fresh pears, buying an average of **664 g** per shopping trip.
- The supply per capita was **2.4 kg**, based on the volume supplied.

## Fresh Pears Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	118,948	114,498	-4%	118,545	+4%
Production (\$m)	\$ 101.6	\$ 115.4	+14%	\$ 130.0	+13%
Producing Trees (000 Trees)	1,354	1,354	-	1,354	-
Fresh Export Volume (t)	12,467	9,190	-26%	9,732	+6%
Fresh Export Value (\$m)	\$ 19.6	\$ 16.4	-16%	\$ 16.1	-1%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	59,428	66,137	+11%	62,337	-6%
Fresh Supply Wholesale Value (\$m)	\$ 93.5	\$ 121.1	+30%	\$ 128.3	+6%
Supply per Capita (kg)	2.38	2.62	+10%	2.42	-8%
Retail Supply (t)	-	59,718	-	56,929	-5%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 109.4	-	\$ 117.2	+7%
Food Service Supply (t)	-	6,420	-	5,408	-16%
Food Service Wholesale Value (\$m)	\$ -	\$ 11.8	-	\$ 11.1	-5%

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

## Major Pears Production Areas

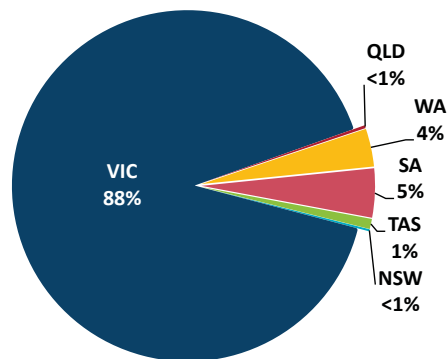


Source: APAL





## 2019/20 Fresh Pears Production by State



Source: APAL

## Fresh Pears Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	236												
Victoria	107,266												
Queensland	323												
Western Australia	4,191												
South Australia	5,413												
Tasmania	1,116												
Availability legend			High		Medium		Low						

Source: APAL

## Main Pear varieties

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

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

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

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



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

## Seasonality by Pear Variety

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

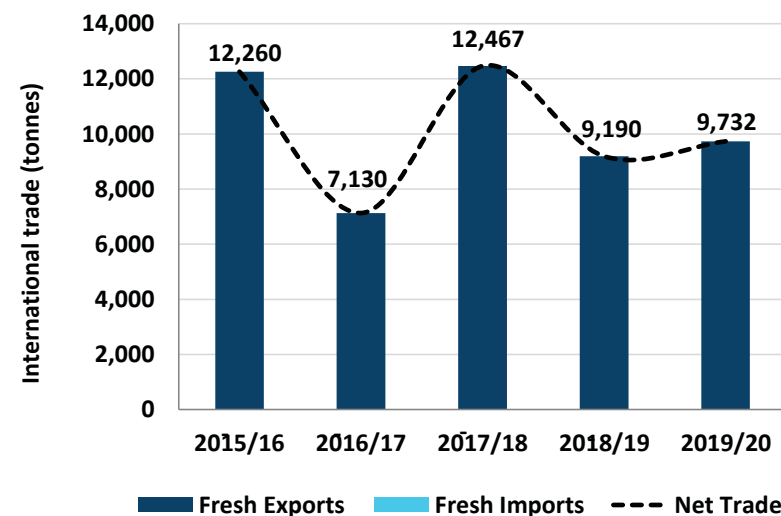
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	45,403												
William	14,414												
Beurre Bosc	7,207												
Corella	721												
<b>Others</b>	<b>4,324</b>												
<b>Processed</b>	<b>46,476</b>												
Availability legend			High		Medium		Low						

Source: APAL

## Fresh Pears International Trade

For the year ending June 2020, Australia exported **9,732 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Pears International Trade

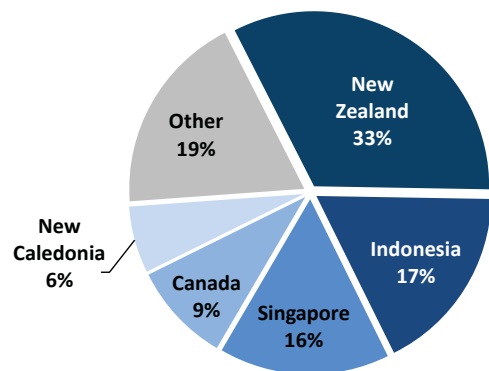


Source: GTA



For the year ending June 2020, **33%** of exported fresh pears were sent to New Zealand, as profiled in the chart below.

### 2019/20 Fresh Pears Exports by Country



Source: GTA

### Fresh Pears Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Victoria	11,588	8,592	9,361
Queensland	468	312	172
New South Wales	292	258	160
Western Australia	27	27	26
South Australia	1	1	13
<b>Other</b>	<b>92</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
<b>TOTAL</b>	<b>12,467</b>	<b>9,190</b>	<b>9,732</b>

### Fresh Pears Imports and Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
New Zealand	2,989	2,428	3,190
Indonesia	2,406	1,597	1,694
Singapore	1,284	1,297	1,533
Canada	1,540	1,424	900
New Caledonia	635	584	601
<b>Other</b>	<b>3,613</b>	<b>1,860</b>	<b>1,814</b>
<b>TOTAL</b>	<b>12,467</b>	<b>9,190</b>	<b>9,732</b>

Source: GTA



## Processed Pears International Trade

For the year ending June 2020, an additional **1,903 tonnes** of preserved pears were imported, while **52 tonnes** were exported.



Source: GTA





## Fresh Persimmons Overview

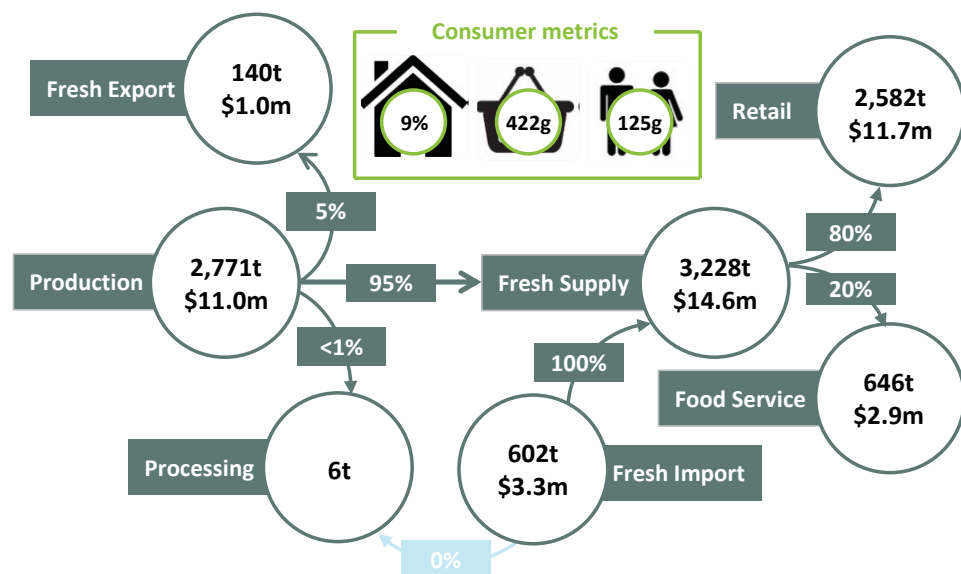
Persimmons are grown around Australia, with half of all production occurring in Queensland. There is a small export crop, but the majority of production is used in the fresh market.

For the year ending June 2020:

- **2,771 t** produced and valued at **\$11.0 m**.
- The wholesale value of the fresh supply was **\$14.6 m**, with **\$11.7 m** distributed into retail and **\$2.9 m** into food service.
- **9%** of Australian households purchased fresh persimmons, buying an average of **422 g** per shopping trip.
- The supply per capita was **125 g**, based on the volume supplied.



## Fresh Persimmons Supply Chain —Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,519	2,600	+3%	2,771	+7%
Production (\$m)	\$ 11.6	\$ 9.6	-17%	\$ 11.0	+14%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	183	125	-31%	140	+12%
Fresh Export Value (\$m)	\$ 1.1	\$ 0.8	-22%	\$ 1.0	+21%
Fresh Import Volume (t)	445	635	+43%	602	-5%
Fresh Import Value (\$m)	\$ 2.6	\$ 3.2	+26%	\$ 3.3	<1%
Fresh Supply (t)	2,756	3,105	+13%	3,228	+4%
Fresh Supply Wholesale Value (\$m)	\$ 15.0	\$ 13.2	-12%	\$ 14.6	+11%
Supply per Capita (kg)	0.11	0.12	+11%	0.13	+2%
Retail Supply (t)	-	2,484	-	2,582	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 10.6	-	\$ 11.7	+11%
Food Service Supply (t)	-	621	-	646	+4%
Food Service Wholesale Value (\$m)	\$ -	\$ 2.6	-	\$ 2.9	+11%

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

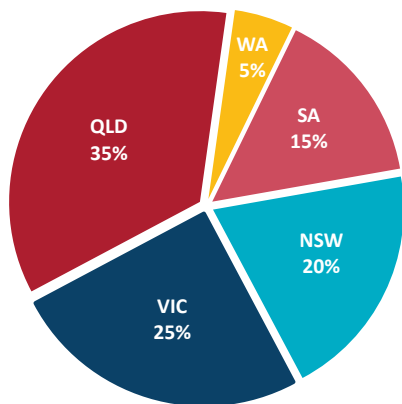
## Major Persimmons Production Areas



Source: PAus



## 2019/20 Fresh Persimmons Production by State



Source: PAus

## Fresh Persimmons Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	554												
Victoria	693												
Queensland	970												
Western Australia	139												
South Australia	416												
Imported	602												
Availability legend		High		Medium		Low		None					

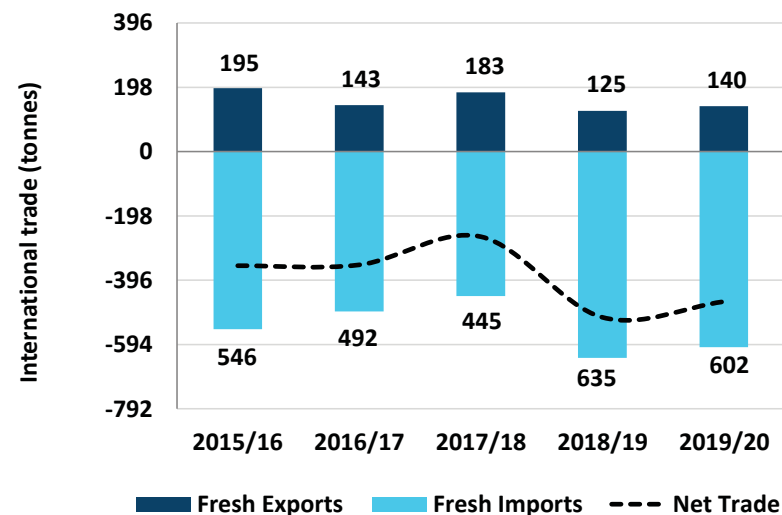
Source: PAus

## Fresh Persimmons International Trade

There is a small amount of international trade of persimmons, typically with more imports than exports. For the year ending June 2020, Australia exported **140 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.



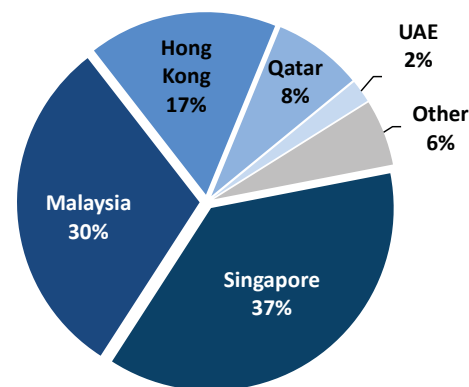
## Net Fresh Persimmons International Trade



Source: GTA

For the year ending June 2020, **37%** of exported persimmons were sent to Singapore, as profiled in the chart below.

## 2019/20 Fresh Persimmons Exports by Country



Source: GTA



## Fresh Persimmons Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	290	399	465	South Australia	31	23	45
Victoria	57	123	82	Victoria	57	23	45
Western Australia	51	65	42	Queensland	53	47	32
Queensland	48	49	12	New South Wales	12	17	16
<b>TOTAL</b>	<b>445</b>	<b>635</b>	<b>602</b>	Western Australia	26	9	1
				<b>Other</b>	<b>3</b>	<b>6</b>	<b>1</b>
				<b>TOTAL</b>	<b>183</b>	<b>125</b>	<b>140</b>

## Fresh Persimmons Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New Zealand	408	605	601	Singapore	74	37	52
Japan	-	1	1	Malaysia	58	46	42
US	30	29	-	Hong Kong	30	12	23
Sth. Korea	-	1	-	Qatar	4	10	11
<b>Other</b>	<b>7</b>	<b>-</b>	<b>-</b>	UAE	4	4	3
<b>TOTAL</b>	<b>445</b>	<b>635</b>	<b>602</b>	<b>Other</b>	<b>13</b>	<b>16</b>	<b>8</b>
				<b>TOTAL</b>	<b>183</b>	<b>125</b>	<b>140</b>

Source: GTA







## Fresh Pineapples Overview

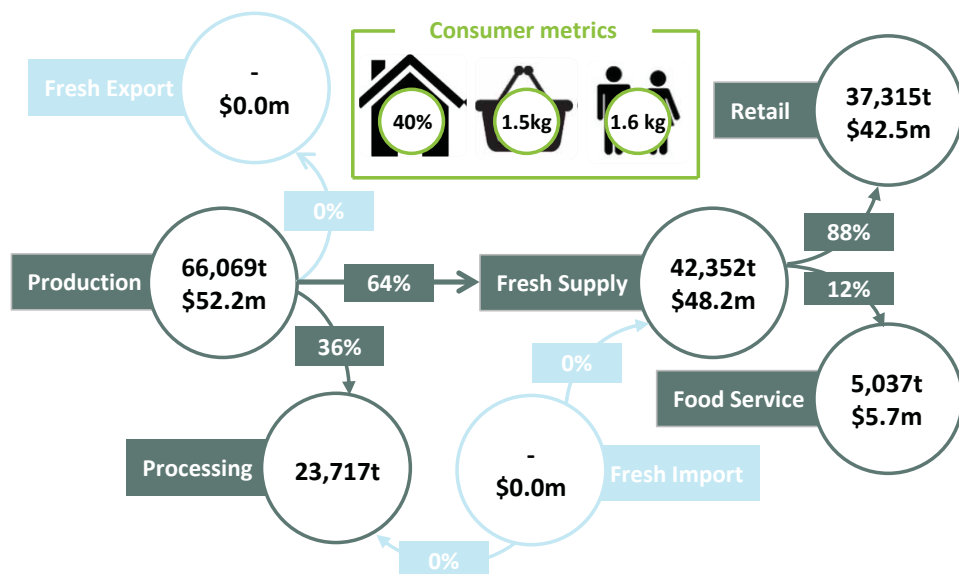
The majority of pineapple production occurs in Queensland. **36%** of pineapples grown in Australia in 2020 were sent to be processed, with the majority of this volume either tinned or juiced.

For the year ending June 2020:

- **66,069 t** was produced, valued at **\$52.2 m**, with **36%** sent to be processed.
- The wholesale value of the fresh supply was **\$48.2 m**, with **\$42.5 m** distributed into retail and **\$5.7 m** into food service.
- **40%** of Australian households purchased fresh pineapples, buying an average of **1.5 kg** per shopping trip.
- The supply per capita was **1.6 kg**, based on the volume supplied.



## Fresh Pineapples Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	76,002	70,539	-7%	66,069	-6%
Production (\$m)	\$ 53.4	\$ 49.7	-7%	\$ 52.2	+5%
Production area (Ha)	2,213	2,265	+2%	2,265	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	47,206	45,371	-4%	42,352	-7%
Fresh Supply Wholesale Value (\$m)	\$ 48.3	\$ 46.0	-5%	\$ 48.2	+5%
Supply per Capita (kg)	1.89	1.80	-5%	1.64	-9%
Retail Supply (t)	-	39,282	-	37,315	-5%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 39.8	-	\$ 42.5	+7%
Food Service Supply (t)	-	6,089	-	5,037	-17%
Food Service Wholesale Value (\$m)	\$ -	\$ 6.2	-	\$ 5.7	-7%

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

\*Note: Production area has been modified from those published in the previous edition of the handbook (2018/19 edition).

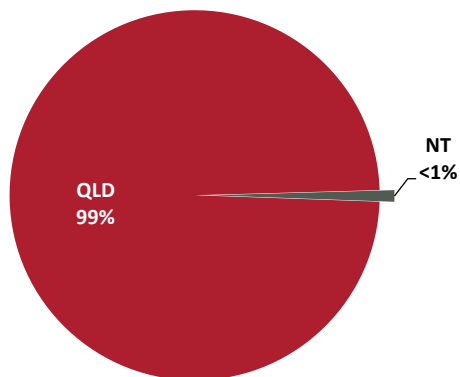
## Major Pineapple Production Areas



Source: QDAF



## 2019/20 Fresh Pineapple Production by State



Sources: ABS; (Freshlogic Analysis)

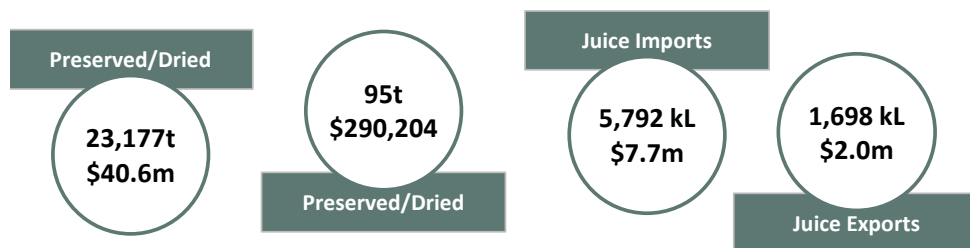
## Fresh Pineapple Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	65,408												
Northern Territory	661												
Availability legend		High		Medium		Low		None					

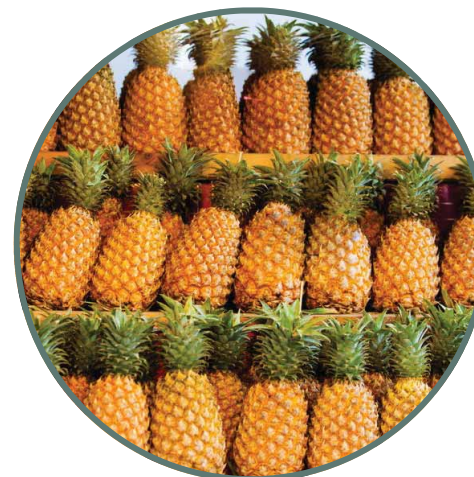
Source: (Freshlogic Analysis); QDAF

## Processed Pineapple International Trade

For the year ending June 2020, an additional **23,177 tonnes** of preserved pineapples were imported, while **95 tonnes** were exported. Australia also imported **5,792 kilo litres** of pineapple juice, while exporting **1,698 kilo litres** of pineapple juice.



Source: GTA





## Fresh Summerfruit Overview

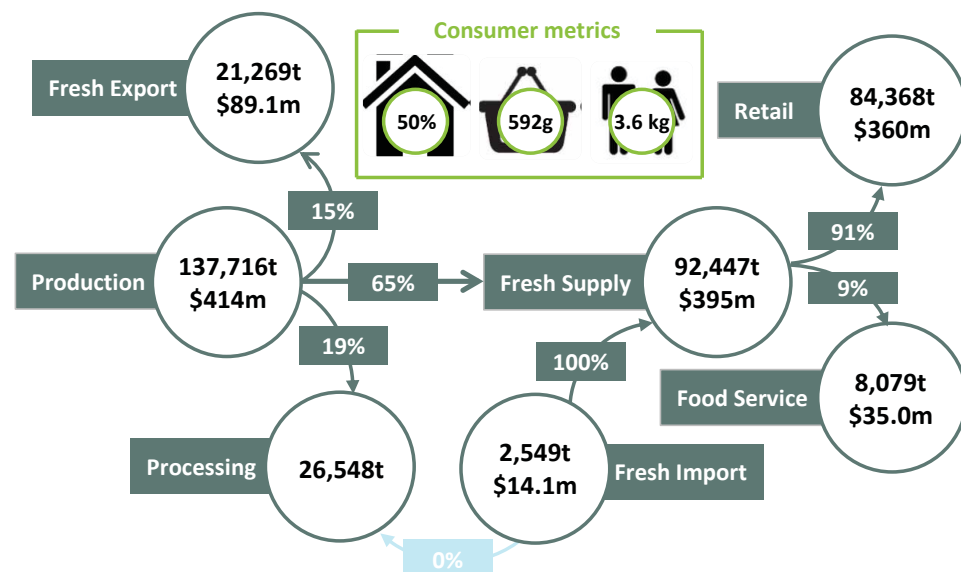
Pages 192-193 profile total summerfruit production and trade. They combine information on apricots, nectarines/peaches and plums. The following pages profile each summerfruit category in more detail.

For the year ending June 2020:

- **137,716 t** produced and valued at **\$414 m**.
- The wholesale value of the fresh supply was **\$395 m**, with **\$360 m** distributed into retail and **\$35.0 m** into food service.
- **50%** of Australian households purchased a summerfruit, buying an average of **592 g** per shopping trip.
- The supply per capita of summerfruit was **3.6 kg**, based on the volume supplied.



## Fresh Summerfruit Supply Chain—Year Ending June 2020



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

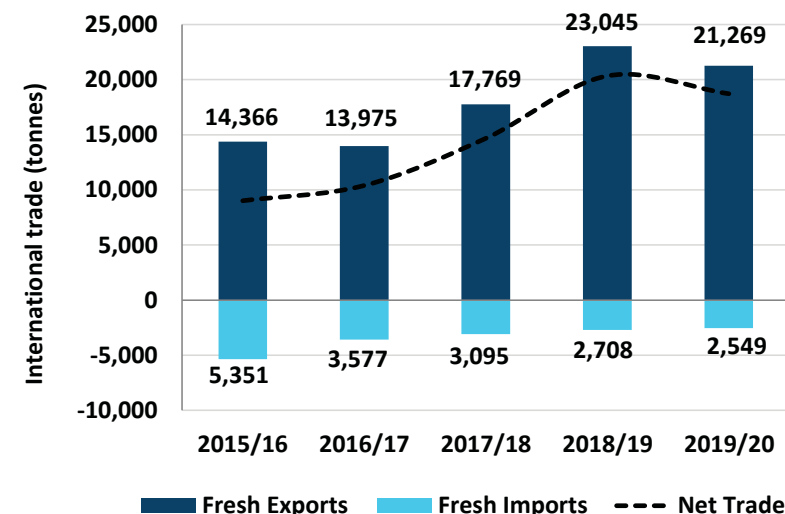


Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	153,148	161,039	+5%	137,716	-14%
Production (\$m)	\$ 397.8	\$ 461.0	+16%	\$ 413.9	-10%
Producing Trees (000 Trees)	4,140	-	-	5,817	-
Fresh Export Volume (t)	17,769	23,045	+30%	21,269	-8%
Fresh Export Value (\$m)	\$ 65.1	\$ 89.0	+37%	\$ 89.1	<1%
Fresh Import Volume (t)	3,095	2,708	-13%	2,549	-6%
Fresh Import Value (\$m)	\$ 14.2	\$ 15.6	+10%	\$ 14.1	-10%
Fresh Supply (t)	106,684	108,278	+1%	92,447	-15%
Fresh Supply Wholesale Value (\$m)	\$ 391.7	\$ 449.0	+15%	\$ 394.8	-12%
Supply per Capita (kg)	4.28	4.30	<1%	3.58	-17%
Retail Supply (t)	-	97,822	-	84,368	-14%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 405.1	-	\$ 359.8	-11%
Food Service Supply (t)	-	10,456	-	8,079	-23%
Food Service Wholesale Value (\$m)	\$ -	\$ 43.9	-	\$ 35.0	-20%

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

## Fresh Summerfruit International Trade

### Net Fresh Summerfruit International Trade



Source: GTA



## Fresh Apricots Overview

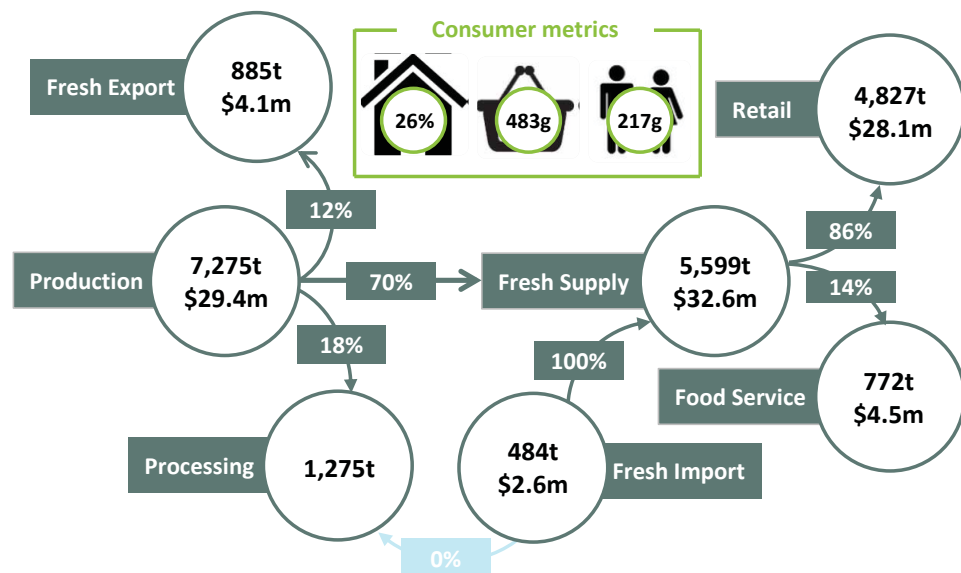
The majority of apricot production occurs in the southern states. Approximately a fifth of apricots grown in Australia are sent to be processed, either tinned or dried.

For the year ending June 2020:

- **7,275 t** produced and valued at **\$29.4 m** with **18%** sent to be processed.
- The wholesale value of the fresh supply was **\$32.6 m**, with **\$28.1 m** distributed into retail and **\$4.5 m** into food service.
- **26%** of Australian households purchased fresh apricots, buying an average of **483 g** per shopping trip.
- The supply per capita was **217 g**, based on the volume supplied.



## Fresh Apricots Supply Chain—Year Ending June 2020



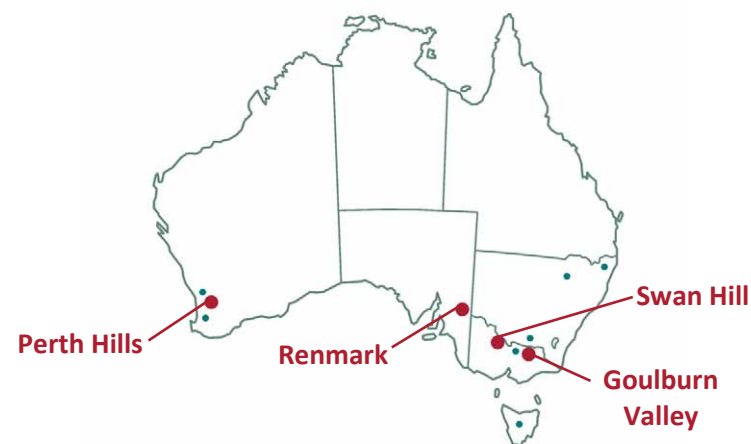
Sources: ABS; AC; CFVIWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,732	9,028	+17%	7,275	-19%
Production (\$m)	\$ 29.8	\$ 35.1	+18%	\$ 29.4	-16%
Producing Trees (000 Trees)	537	-	-	587	-
Fresh Export Volume (t)	404	561	+39%	885	+58%
Fresh Export Value (\$m)	\$ 1.9	\$ 2.4	+25%	\$ 4.1	+73%
Fresh Import Volume (t)	434	339	-22%	484	+43%
Fresh Import Value (\$m)	\$ 1.9	\$ 1.6	-16%	\$ 2.6	+66%
Fresh Supply (t)	6,407	7,224	+13%	5,599	-22%
Fresh Supply Wholesale Value (\$m)	\$ 34.8	\$ 40.0	+15%	\$ 32.6	-18%
Supply per Capita (kg)	0.26	0.29	+12%	0.22	-24%
Retail Supply (t)	-	6,174	-	4,827	-22%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 34.2	-	\$ 28.1	-18%
Food Service Supply (t)	-	1,050	-	772	-26%
Food Service Wholesale Value (\$m)	\$ -	\$ 5.8	-	\$ 4.5	-23%

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

## Major Apricots Production Areas

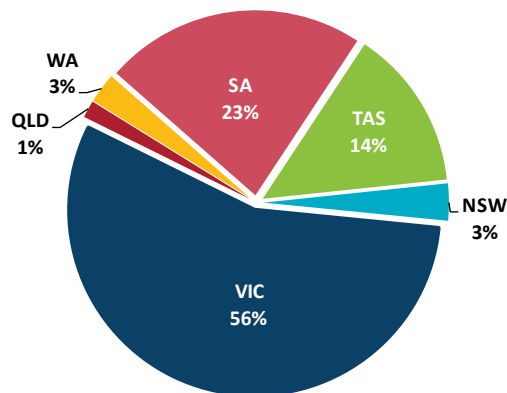


Source: SAL





## 2019/20 Fresh Apricots Production by State



Source: SAL

## Fresh Apricots Seasonality by State

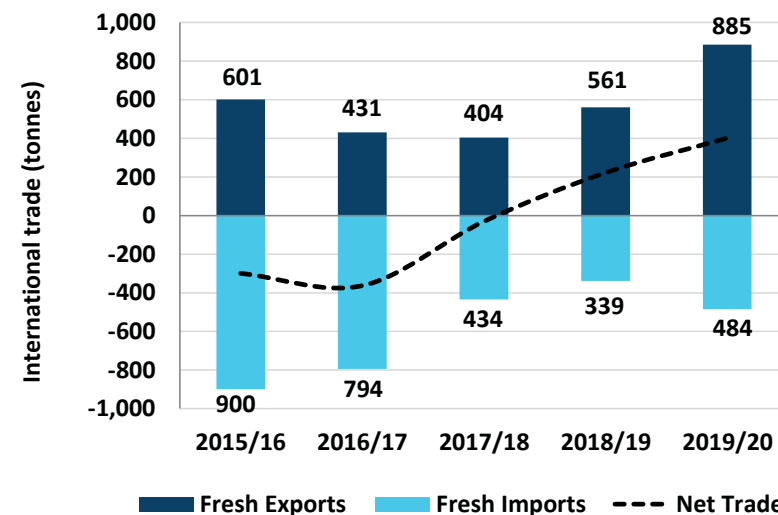
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	235												
Victoria	4,056												
Queensland	110												
Western Australia	192												
South Australia	1,659												
Tasmania	1,022												
Availability legend			High		Medium		Low						None

Source: SAL

## Fresh Apricots International Trade

Australia is a net exporter of fresh apricots, with exports growing in recent years. For the year ending June 2020, Australia exported **885 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

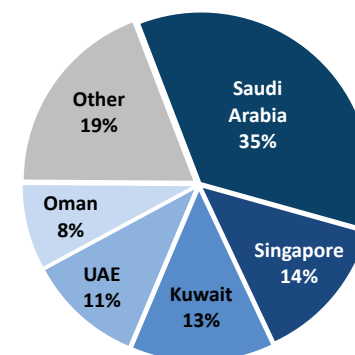
## Net Fresh Apricot International Trade



Source: GTA

For the year ending June 2020, **35%** of exported fresh apricots were sent to Saudi Arabia, as profiled in the chart below.

## 2019/20 Fresh Apricots Exports by Country



Source: GTA





## Fresh Apricots Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	247	117	229	Victoria	320	470	672
Victoria	63	144	180	New South Wales	56	74	193
Western Australia	49	60	76	Queensland	4	10	13
Queensland	74	18	-	South Australia	< 0.5	5	3
<b>TOTAL</b>	<b>434</b>	<b>339</b>	<b>484</b>	Northern Territory	-	-	2
				<b>Other</b>	<b>23</b>	<b>3</b>	<b>3</b>
				<b>TOTAL</b>	<b>404</b>	<b>561</b>	<b>885</b>

## Fresh Apricots Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New Zealand	412	301	479	Saudi Arabia	99	164	311
US	3	11	3	Singapore	50	42	121
Pakistan	-	-	2	Kuwait	37	85	118
India	-	-	< 0.5	UAE	64	52	95
Turkey	19	27	-	Oman	37	55	71
<b>TOTAL</b>	<b>434</b>	<b>339</b>	<b>484</b>	<b>Other</b>	<b>117</b>	<b>162</b>	<b>169</b>
				<b>TOTAL</b>	<b>404</b>	<b>561</b>	<b>885</b>

Source: GTA

## Processed Apricots International Trade

For the year ending June 2020, an additional **4,156 tonnes** of dried apricots and **2,002 tonnes** of preserved apricots were imported, while **50 tonnes** of dried apricots and **68 tonnes** of preserved apricots were exported.



Source: GTA





## Fresh Nectarines/ Peaches

### Overview

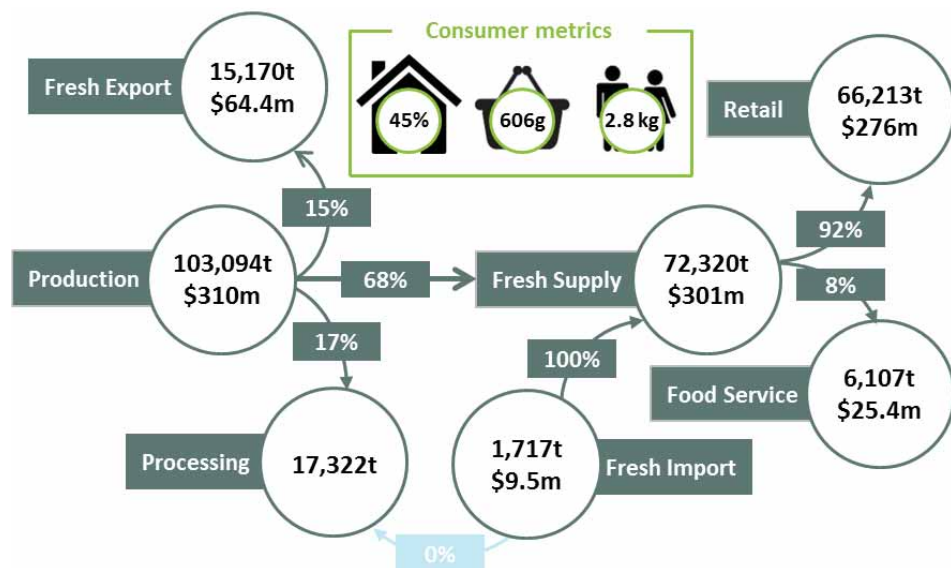
The majority of nectarine and peach production occurs in the south of Australia, with Victoria being the major producing state.

For the year ending June 2020:

- **103,094 t** produced and valued at **\$310 m** with **17%** sent to be processed. Majority are peaches destined for canning.
- The wholesale value of the fresh supply was **\$301 m**, with **\$276 m** distributed into retail and **\$25.4 m** into food service.
- **45%** of Australian households purchased fresh nectarines and peaches, buying an average of **606 g** per shopping trip.
- The supply per capita was **2.8 kg**, based on the volume supplied.



### Fresh Nectarines/Peaches Supply Chain—Year Ending June 2020



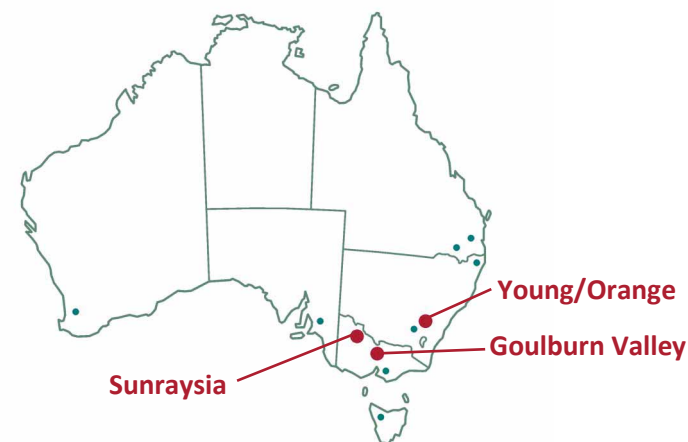
Sources: ABS; AC; CFVIWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	115,651	119,771	+4%	103,094	-14%
Production (\$m)	\$ 289.5	\$ 350.3	+21%	\$ 310.1	-11%
Producing Trees (000 Trees)	3,604	-	-	3,742	-
Fresh Export Volume (t)	12,068	15,645	+30%	15,170	-3%
Fresh Export Value (\$m)	\$ 43.2	\$ 61.6	+43%	\$ 64.4	+4%
Fresh Import Volume (t)	2,281	2,030	-11%	1,717	-15%
Fresh Import Value (\$m)	\$ 10.7	\$ 12.1	+13%	\$ 9.5	-21%
Fresh Supply (t)	84,085	84,688	<1%	72,320	-15%
Fresh Supply Wholesale Value (\$m)	\$ 291.0	\$ 351.2	+21%	\$ 301.2	-14%
Supply per Capita (kg)	3.37	3.36	>-1%	2.80	-17%
Retail Supply (t)	-	76,770	-	66,213	-14%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 318.4	-	\$ 275.7	-13%
Food Service Supply (t)	-	7,919	-	6,107	-23%
Food Service Wholesale Value (\$m)	\$ -	\$ 32.8	-	\$ 25.4	-22%

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

## Major Nectarine/Peach Production Areas

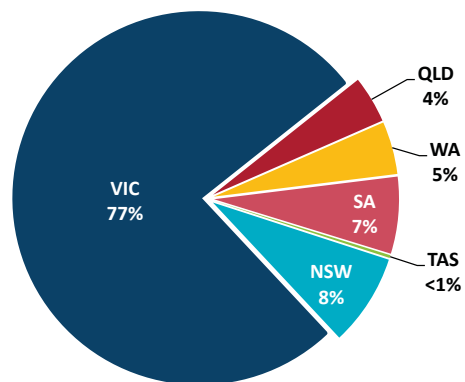


Source: SAL



## Summerfruit—Nectarines/Peaches

### 2019/20 Fresh Nectarines/Peaches Production by State



Source: SAL

### Fresh Nectarines/Peaches Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,279												
Victoria	78,652												
Queensland	4,239												
Western Australia	4,749												
South Australia	6,924												
Tasmania	251												
Imported	1,717												
Availability legend			High		Medium		Low						

Source: SAL

## Main Categories

**Nectarines** accounted for **59%** of combined production for the year ending June 2020.

**Peaches** accounted for **41%** of combined production for the year ending June 2020.

## Summerfruit—Nectarines/Peaches



### Seasonality by Category

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

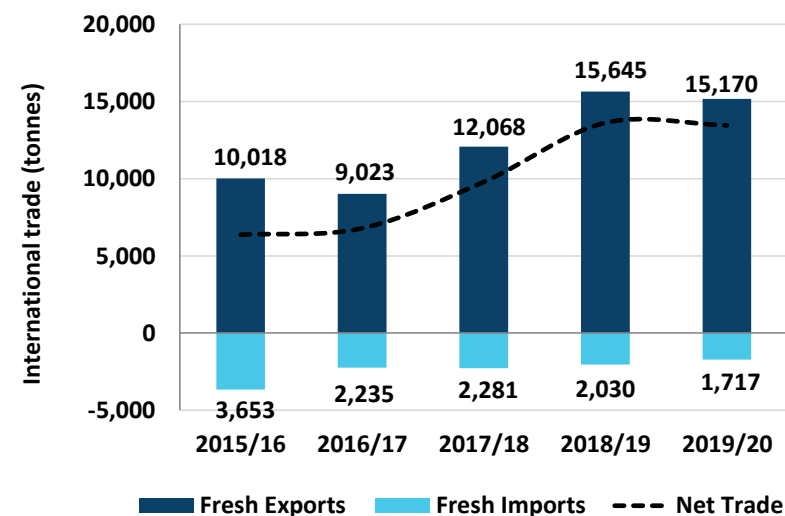
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Nectarines	60,914												
Peaches	42,180												
Availability legend			High		Medium		Low						

Source: SAL

## Fresh Nectarines/Peaches International Trade

Australia is a net exporter of fresh nectarines and peaches, with exports growing in recent years. For the year ending June 2020, Australia exported **15,170 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Nectarines/Peaches International Trade

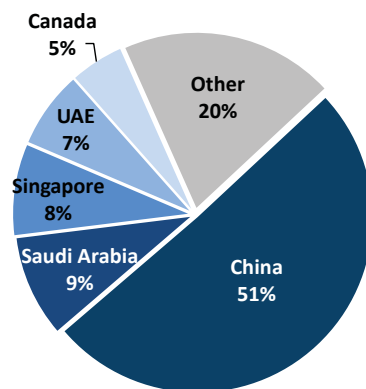


Source: GTA



For the year ending June 2020, **51%** of exported fresh nectarines and peaches were sent to China, as profiled in the chart below.

## 2019/20 Fresh Nectarines/Peaches Exports by Country



Source: GTA

## Fresh Nectarines/Peaches Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	1,268	1,281	1,028	Victoria	10,672	13,625	13,778
Victoria	489	345	434	New South Wales	939	1,023	1,028
Western Australia	350	323	220	Queensland	79	274	186
Queensland	174	81	36	South Australia	241	644	143
<b>TOTAL</b>	<b>2,281</b>	<b>2,030</b>	<b>1,717</b>	Western Australia	120	62	20
				<b>Other</b>	<b>16</b>	<b>17</b>	<b>15</b>
				<b>TOTAL</b>	<b>12,068</b>	<b>15,645</b>	<b>15,170</b>

## Fresh Nectarines/Peaches Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	2,227	2,015	1,626	China	3,992	6,707	7,685
China	40	-	61	Singapore	1,391	1,596	1,270
New Zealand	14	15	9	Saudi Arabia	1,267	1,778	1,415
<b>Other</b>	<b>-</b>	<b>&lt; 0.5</b>	<b>20</b>	UAE	1,693	1,652	1,067
<b>TOTAL</b>	<b>2,281</b>	<b>2,030</b>	<b>1,717</b>	Malaysia	640	709	647
				<b>Other</b>	<b>3,085</b>	<b>3,204</b>	<b>3,086</b>
				<b>TOTAL</b>	<b>12,068</b>	<b>15,645</b>	<b>15,170</b>

Source: GTA



## Processed Nectarines/Peaches International Trade

For the year ending June 2020, an additional **7,229 tonnes** of preserved peaches were imported, while **1,159 tonnes** were exported.

Preserved Imports

7,229  
\$14.6m

1,159  
\$3.7m

Preserved Exports

Source: GTA





## Fresh Plums Overview

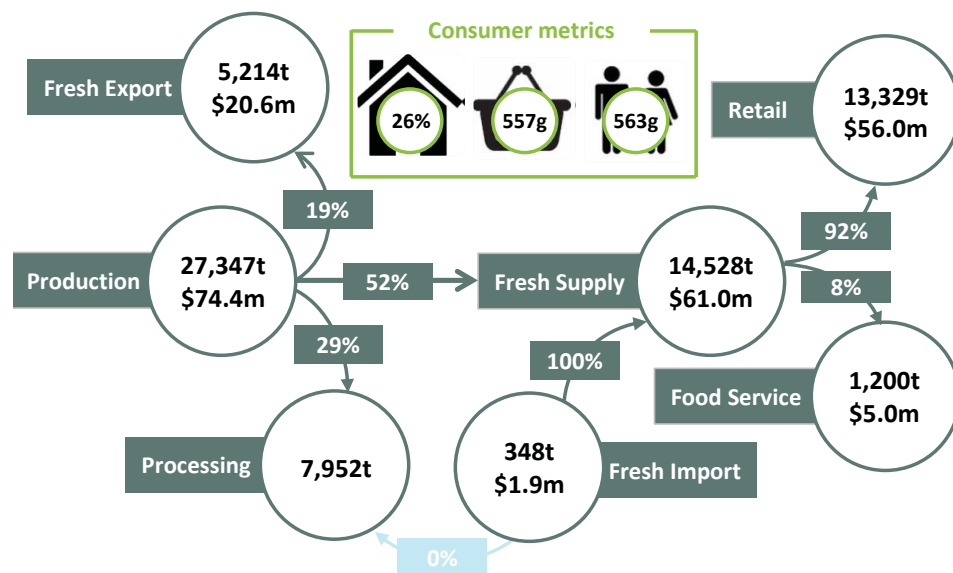
The majority of plum production occurs in the southern states, with Victoria being the major producing state.

For the year ending June 2020:

- **27,347 t** produced and valued at **\$74.4 m**.
- The wholesale value of the fresh supply was **\$61.0 m**, with **\$56.0 m** distributed into retail and **\$5.0 m** into food service.
- **26%** of Australian households purchased fresh plums, buying an average of **557 g** per shopping trip.
- The supply per capita was **563 g**, based on the volume supplied.



## Fresh Plums Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	29,764	32,241	+8%	27,347	-15%
Production (\$m)	\$ 78.5	\$ 75.7	-4%	\$ 74.4	-2%
Producing Trees (000 Trees)	-	-	-	1,488	-
Fresh Export Volume (t)	5,297	6,839	+29%	5,214	-24%
Fresh Export Value (\$m)	\$ 20.0	\$ 25.0	+25%	\$ 20.6	-18%
Fresh Import Volume (t)	380	339	-11%	348	+3%
Fresh Import Value (\$m)	\$ 1.6	\$ 2.0	+26%	\$ 1.9	-3%
Fresh Supply (t)	16,192	16,366	+1%	14,528	-11%
Fresh Supply Wholesale Value (\$m)	\$ 66.0	\$ 57.8	-12%	\$ 61.0	+6%
Supply per Capita (kg)	0.65	0.65	>-1%	0.56	-13%
Retail Supply (t)	-	14,878	-	13,329	-10%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 52.5	-	\$ 56.0	+7%
Food Service Supply (t)	-	1,488	-	1,200	-19%
Food Service Wholesale Value (\$m)	\$ -	\$ 5.3	-	\$ 5.0	-4%

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

## Major Plum Production Areas



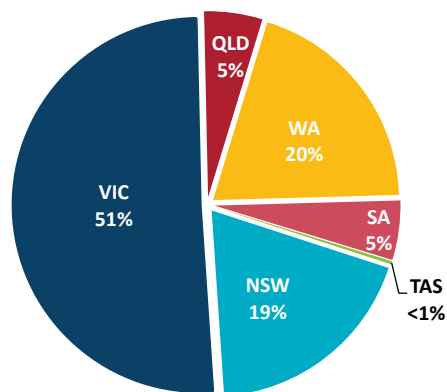
Source: SAL





## Summerfruit—Plums

### 2019/20 Fresh Plums Production by State



Source: SAL

### Fresh Plums Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,176												
Victoria	13,872												
Queensland	1,385												
Western Australia	5,426												
South Australia	1,412												
Tasmania	76												
Imported	348												
Availability legend		High	Medium	Low	None								

Source: SAL

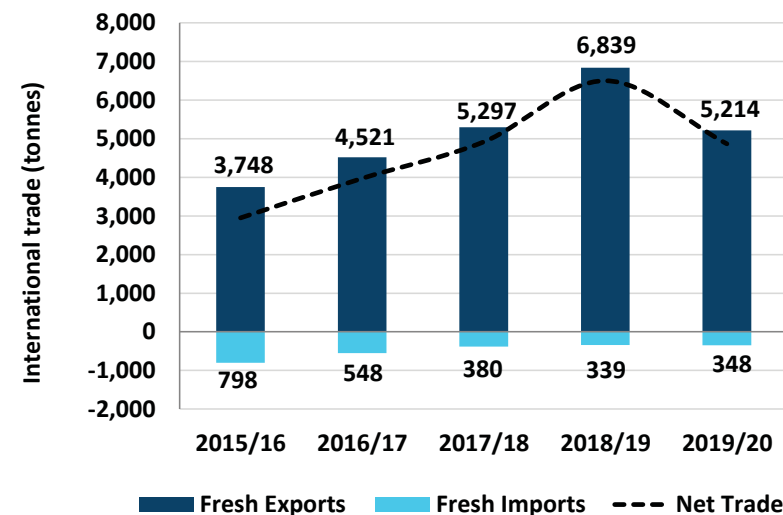
### Fresh Plums International Trade

Australia is a net exporter of fresh plums, typically exporting between **3,000-7,000 tonnes** per year. For the year ending June 2020, Australia exported **5,214 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.

## Summerfruit—Plums



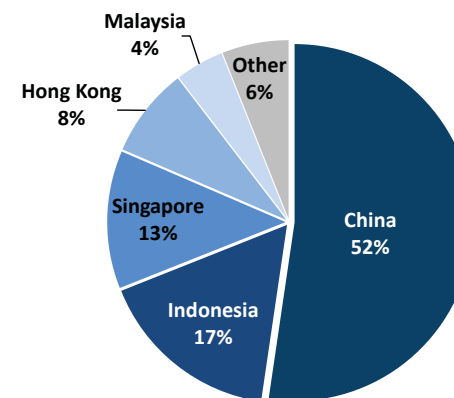
### Net Fresh Plums International Trade



Source: GTA

For the year ending June 2020, **52%** of exported fresh plums were sent to China, as profiled in the chart below.

### 2019/20 Fresh Plums Exports by Country



Source: GTA



## Fresh Plums Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	177	228	269	Victoria	2,418	4,359	3,750
Western Australia	39	56	42	New South Wales	1,794	1,506	956
Victoria	155	55	37	Western Australia	952	572	456
Queensland	9	-	-	South Australia	15	54	29
<b>TOTAL</b>	<b>380</b>	<b>339</b>	<b>348</b>	Queensland	86	329	15
				<b>Other</b>	<b>32</b>	<b>20</b>	<b>9</b>
				<b>TOTAL</b>	<b>5,297</b>	<b>6,839</b>	<b>5,214</b>

## Fresh Plums Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	379	338	348	China	993	2,604	2,728
Iran	-	1	-	Indonesia	562	999	869
Germany	1	-	-	Singapore	1,009	964	651
<b>TOTAL</b>	<b>380</b>	<b>339</b>	<b>348</b>	Hong Kong	2,052	1,515	423
				Malaysia	228	346	229
				<b>Other</b>	<b>453</b>	<b>411</b>	<b>314</b>
				<b>TOTAL</b>	<b>5,297</b>	<b>6,839</b>	<b>5,214</b>

Source: GTA





## Fresh Table Grapes Overview

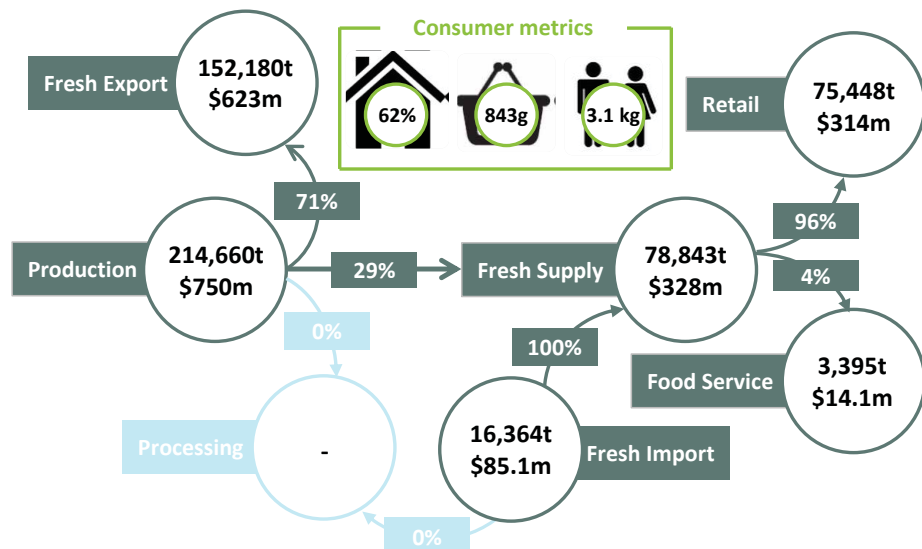
Table grapes are grown across all states of Australia, with Victoria being the major producing state.

For the year ending June 2020:

- **214,660 t** produced and valued at **\$750 m**.
- The wholesale value of the fresh supply was **\$328 m**, with **\$314 m** distributed into retail and **\$14.1 m** into food service.
- **62%** of Australian households purchased table grapes, buying an average of **843 g** per shopping trip.
- The supply per capita was **3.1 kg**, based on the volume supplied.

*Note: Table grape volumes do not include grapes grown for wine or drying. Dried grape production can be found on page 218. Wine grapes are not covered in this handbook.*

## Fresh Table Grapes Supply Chain—Year Ending June 2020



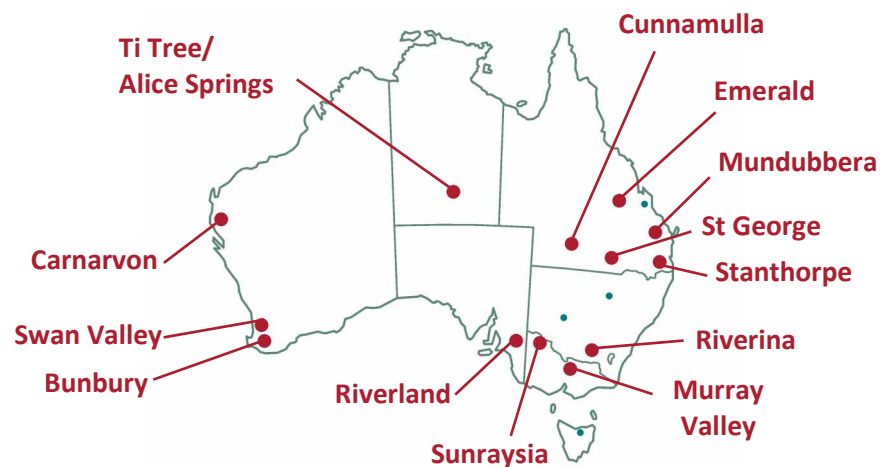
Sources: AC, Australian Table Grape Association (ATGA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	177,416	208,277	+17%	214,660	+3%
Production (\$m)	\$ 543.7	\$ 693.2	+28%	\$ 750.4	+8%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	110,280	146,093	+32%	152,180	+4%
Fresh Export Value (\$m)	\$ 384.1	\$ 555.2	+45%	\$ 622.9	+12%
Fresh Import Volume (t)	15,265	16,809	+10%	16,364	-3%
Fresh Import Value (\$m)	\$ 69.2	\$ 81.3	+18%	\$ 85.1	+5%
Fresh Supply (t)	82,401	78,993	-4%	78,843	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 313.7	\$ 330.8	+5%	\$ 328.1	>-1%
Supply per Capita (kg)	3.30	3.13	-5%	3.06	-2%
Retail Supply (t)	-	75,231	-	75,448	<1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 315.0	-	\$ 314.0	>-1%
Food Service Supply (t)	-	3,762	-	3,395	-10%
Food Service Wholesale Value (\$m)	\$ -	\$ 15.8	-	\$ 14.1	-10%

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

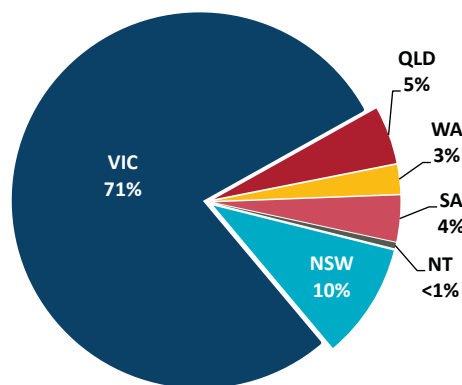
## Major Table Grape Production Areas



Source: ATGA



## 2019/20 Fresh Table Grapes Production by State



Source: ATGA

## Fresh Table Grapes Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	21,466												
Victoria	167,435												
Queensland	10,733												
Western Australia	5,388												
South Australia	8,586												
Northern Territory	1,052												
Imported	16,364												
Availability legend		<div>High</div> <div>Medium</div> <div>Low</div> <div>None</div>											

Source: ATGA

## Main Table Grape Varieties

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

**Menindee** and **Thompson**, the two most common green varieties in Australia. These grapes accounted for **38%** of fresh production for the year ending June 2020.

**Crimson**, **Flame** and **Globe**, the main red varieties in Australia. These three varieties accounted for **30%** of fresh production.



## Seasonality by Table Grape Variety

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

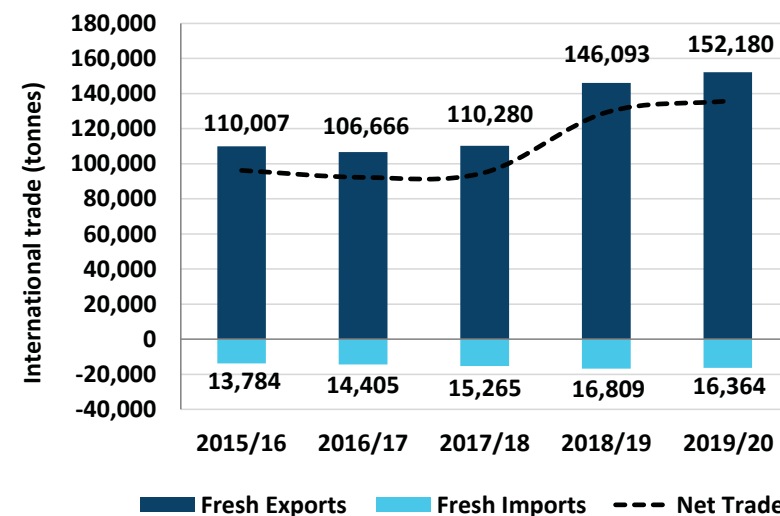
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Menindee	27,906												
White - Thompson	53,665												
Red - Crimson	40,785												
Red - Flame	12,880												
Red - Globe	10,733												
Black	8,552												
Other	60,139												
Availability legend		<div>High</div> <div>Medium</div> <div>Low</div> <div>None</div>											

Source: ATGA

## Fresh Table Grapes International Trade

Australia is a net exporter of fresh table grapes, with exports growing in recent years. For the year ending June 2020, Australia exported **152,180 tonnes**. The exports and imports over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.

### Net Fresh Table Grapes International Trade

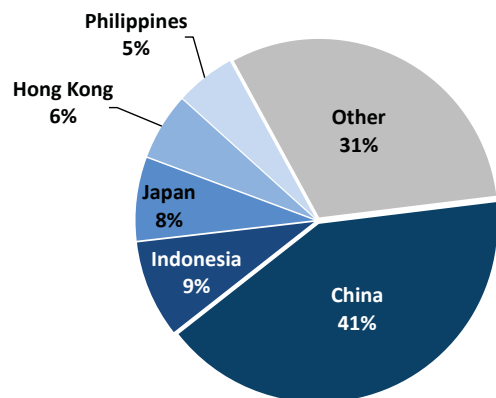


Source: GTA



For the year ending June 2020, **41%** of exported fresh table grapes were sent to China, as profiled in the chart below.

## 2019/20 Fresh Table Grapes Exports by Country



Source: GTA

## Fresh Table Grapes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
New South Wales	5,866	6,650	8,725	Victoria	100,489	132,920	137,666
Victoria	6,998	7,519	5,223	New South Wales	8,315	11,328	12,387
Western Australia	1,279	1,273	1,406	Western Australia	218	1,246	1,169
Queensland	1,123	1,367	1,010	Queensland	865	213	474
<b>TOTAL</b>	<b>15,265</b>	<b>16,809</b>	<b>16,364</b>	South Australia	344	362	415
				<b>Other</b>	<b>48</b>	<b>25</b>	<b>68</b>
				<b>TOTAL</b>	<b>110,280</b>	<b>146,093</b>	<b>152,180</b>

## Fresh Table Grapes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
US	15,224	16,696	15,688	China	41,668	56,432	62,930
Mexico	17	8	530	Indonesia	16,149	23,200	13,321
China	14	98	111	Japan	10,882	13,421	11,430
Sth. Korea	10	7	35	Hong Kong	8,074	7,980	9,152
<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>0</b>	Philippines	5,310	7,412	8,172
<b>TOTAL</b>	<b>15,265</b>	<b>16,809</b>	<b>16,364</b>	<b>Other</b>	<b>28,197</b>	<b>37,648</b>	<b>47,176</b>
				<b>TOTAL</b>	<b>110,280</b>	<b>146,093</b>	<b>152,180</b>

Source: GTA







## Dried Grapes

### Dried Grapes Overview

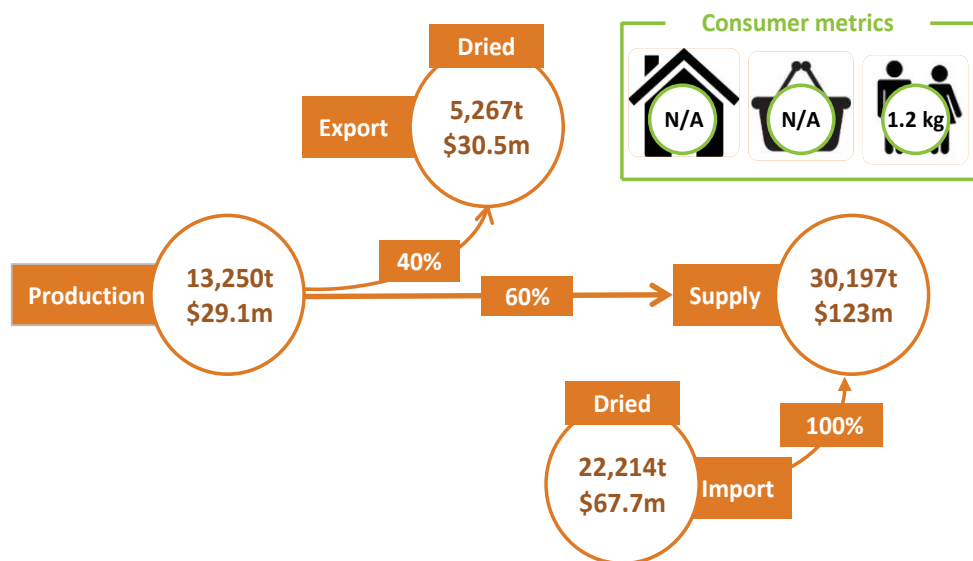
Grapes grown for drying are predominantly grown in Victoria and New South Wales and South Australia with **Sunraysia** being the major producing area. The main varieties grown for dried grapes include sultanas, sunmuscats, currants and raisins.



For the year ending June 2020:

- **13,250 t** of dried grapes were produced and valued at **\$29.1 m**.
- The wholesale value of the dried supply was **\$123.2 m**.
- The dried supply per capita was **1.2 kg**, based on the volume supplied.

### Dried Grapes Supply Chain—Year Ending June 2020



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

## Dried Grapes



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	16,953	15,248	-10%	13,250	-13%
Production (\$m)	\$ 30.6	\$ 29.2	-4%	\$ 29.1	>-1%
Production area (Ha)	3,840	3,774	-2%	3,257	-14%
Dried Export Volume (t)	4,553	5,368	+18%	5,267	-2%
Dried Export Value (\$m)	\$ 19.8	\$ 25.1	+27%	\$ 30.5	+22%
Dried Import Volume (t)	22,189	20,817	-6%	22,214	+7%
Dried Import Value (\$m)	\$ 43.7	\$ 55.3	+26%	\$ 67.7	+23%
Dried Supply (t)	34,589	30,696	-11%	30,197	-2%
Dried Supply Wholesale Value (\$m)	\$ 91.0	\$ 109.1	+20%	\$ 123.2	+13%
Supply per Capita (kg)	1.39	1.22	-12%	1.17	-4%

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

### Major Dried Grape Production Areas

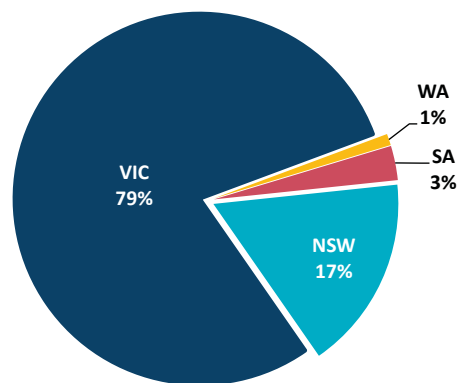


Source: DFA



## Dried Grapes

### 2019/20 Dried Grapes Production by State



Source: DFA

### Dried Grapes Production Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,253												
Victoria	10,468												
Western Australia	133												
South Australia	398												
Fresh production legend			High		Medium			Low				None	

Source: DFA

## Main Dried Grape Varieties

Although there are currently a number of varieties grown in Australia, production for the dried grape market is dominated by 4 main types. These include:

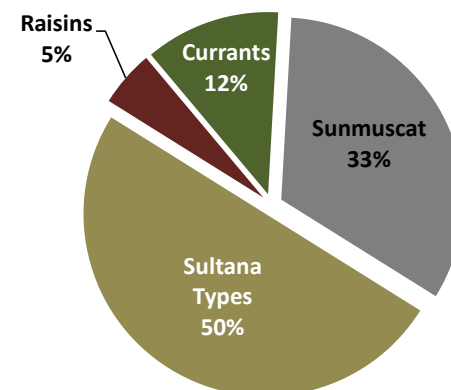
**Sultana types**, which are the most commonly dried grape variety in Australia. These dried grapes accounted for **50%** of production.

**Sunmuscat** accounted for **33%** of production.

**Currants** and **raisins** are the alternative varieties of dried grapes grown in Australia and accounted for **17%** of production.

## Dried Grapes

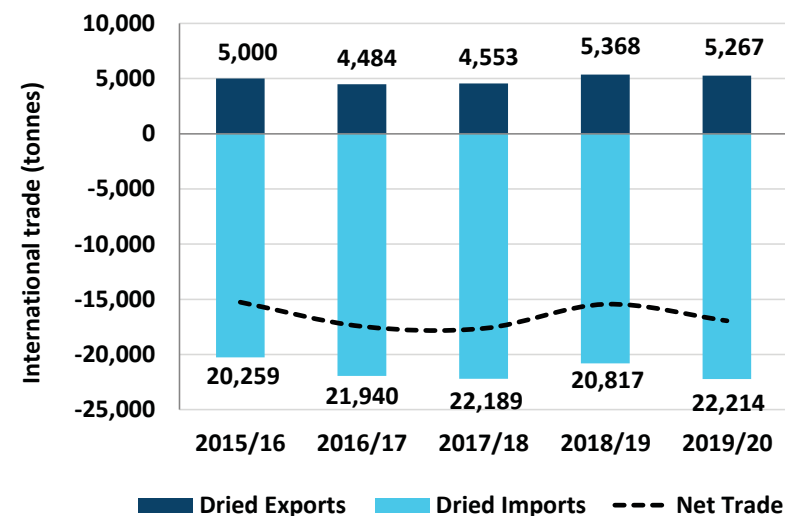
### 2019/20 Main Dried Grape Varieties



Source: DFA

## Processed Dried Grapes International Trade

For the year ending June 2020, Australia imported **22,214 tonnes** of dried grapes. The exports and imports of dried grapes over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



## Prunes Overview

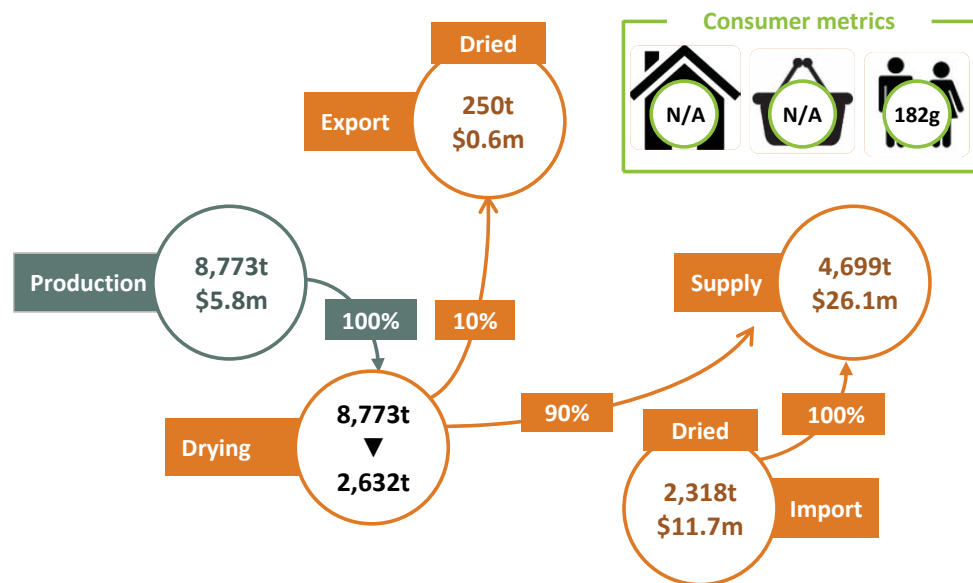
Plums grown for drying are predominantly grown in New South Wales and Victoria, with **Griffith** being the major producing area.

For the year ending June 2020:

- **8,773 t** of fresh plums were produced for drying, which after drying accounted for **2,632 tonnes** of prunes.
- The value of production of the fresh plums grown for drying was **\$5.8 m**, while the wholesale value of the dried supply was **\$26.1 m**.
- The dried supply per capita was **182 g**, based on the volume supplied.



## Prunes Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	3,491	2,095	-40%	2,632	+26%
Production (\$m)	\$ 5.8	\$ 6.3	+9%	\$ 5.8	-8%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	609	129	-79%	250	+95%
Dried Export Value (\$m)	\$ 1.1	\$ 0.4	-62%	\$ 0.6	+36%
Dried Import Volume (t)	1,967	2,611	+33%	2,318	-11%
Dried Import Value (\$m)	\$ 10.1	\$ 12.7	+26%	\$ 11.7	-8%
Dried Supply (t)	4,849	4,577	-6%	4,699	+3%
Dried Supply Wholesale Value (\$m)	\$ 27.5	\$ 24.5	-11%	\$ 26.1	+6%
Supply per Capita (kg)	0.19	0.18	-7%	0.18	<1%

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

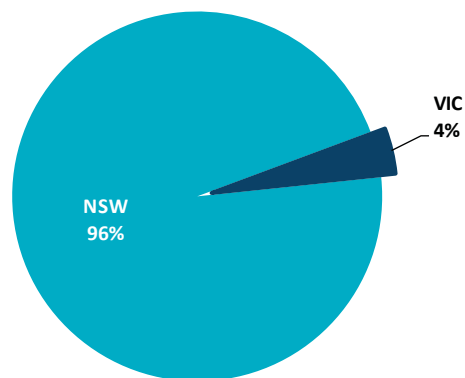
## Major Prunes Production Areas



Source: DFA



## 2019/20 Prunes Production by State



Source: DFA

## Prunes Production Seasonality by State

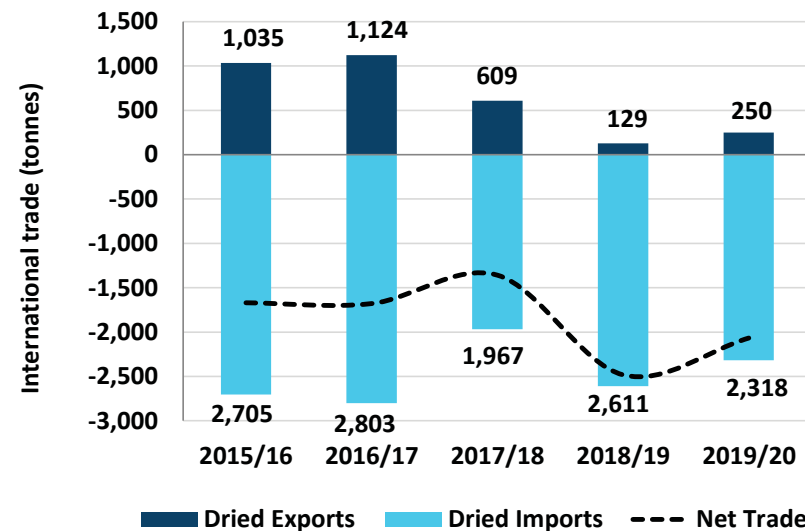
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,422												
Victoria	351												
Fresh production legend			High			Medium			Low			None	

Source: DFA



## Prunes International Trade

For the year ending June 2020, Australia imported **2,318 tonnes** and exported **250 tonnes** of prunes. The exports and imports of prunes over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



## Other Dried Tree Fruit

### Dried Tree Fruit Overview

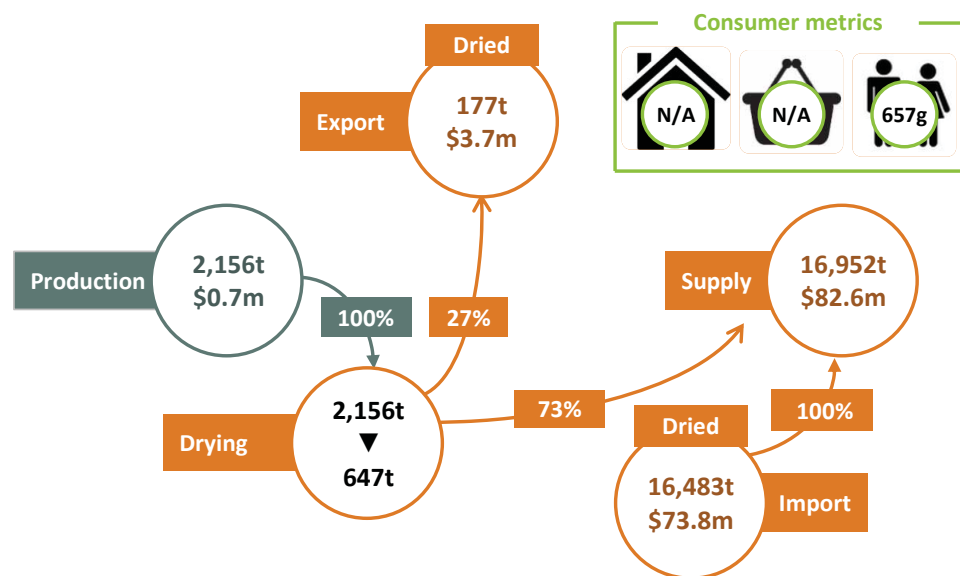
Dried Tree Fruits other than plums are a combination of dried fruits from different categories, predominantly summerfruit. The majority of the fruit grown for this category are from **Riverland**, **Sunraysia** and **Goulburn** regions.



For the year ending June 2020:

- **2,156 t** of fresh tree fruit were produced for drying, which after drying accounted for **647 tonnes** of dried tree fruit.
- The value of production of the fresh tree fruit grown for drying was **\$0.7 m**, while the wholesale value of the dried supply was **\$82.6 m**.
- The dried supply per capita was **657 g**, based on the volume supplied.

### Dried Tree Fruit Supply Chain—Year Ending June 2020



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

## Other Dried Tree Fruit



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	611	517	-15%	647	+25%
Production (\$m)	\$ 0.7	\$ 0.6	-9%	\$ 0.7	+16%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	482	271	-44%	177	-34%
Dried Export Value (\$m)	\$ 4.9	\$ 4.3	-13%	\$ 3.7	-13%
Dried Import Volume (t)	17,765	15,713	-12%	16,483	+5%
Dried Import Value (\$m)	\$ 69.1	\$ 66.0	-4%	\$ 73.8	+12%
Dried Supply (t)	17,893	15,959	-11%	16,952	+6%
Dried Supply Wholesale Value (\$m)	\$ 70.2	\$ 69.5	-1%	\$ 82.6	+19%
Supply per Capita (kg)	0.72	0.63	-12%	0.66	+4%

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

### Major Dried Tree Fruit Production Areas



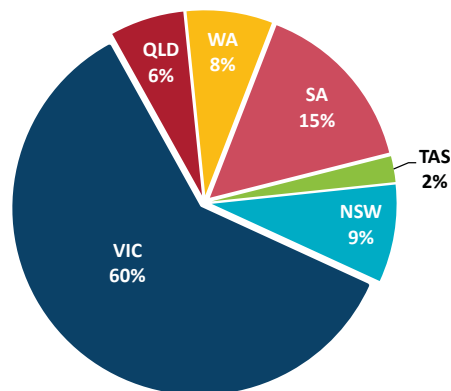
Source: DFA





## Other Dried Tree Fruit

### 2019/20 Dried Tree Fruit Production by State



Source: DFA

### Fresh Tree Fruit Production for drying—Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	184												
Victoria	1,295												
Queensland	139												
Western Australia	161												
South Australia	328												
Tasmania	49												
Fresh production legend		High		Medium		Low		None					

Source: DFA

## Main Dried Tree Fruit Varieties

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

**Apricots** accounted for **38%** of production.

**Apples** grown for drying accounted for **20%** of production.

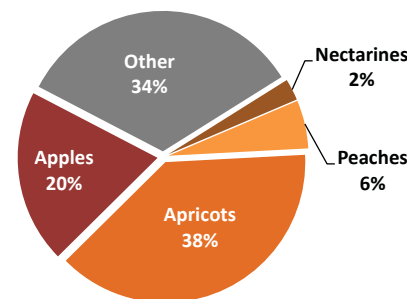
**Nectarines** and **Peaches** and accounted for **8%** of production.

**Other** fruits grown for drying, including pineapples, mandarins and pears, accounted for **34%** of production.



## Other Dried Tree Fruit

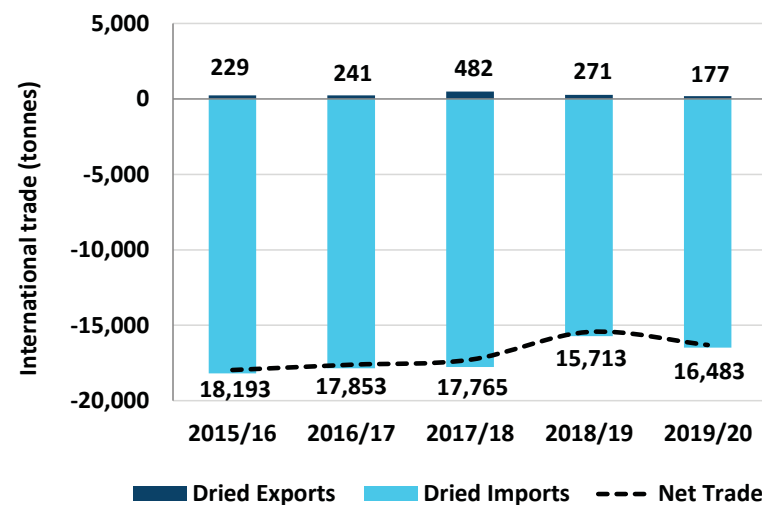
### 2019/20 Main Dried Tree Fruit Varieties



Sources: GTA; DFA

## Processed Dried Tree Fruit International Trade

For the year ending June 2020, Australia imported **16,483 tonnes** of dried tree fruit. The exports and imports of dried fruit over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



## Canned Fruit Overview

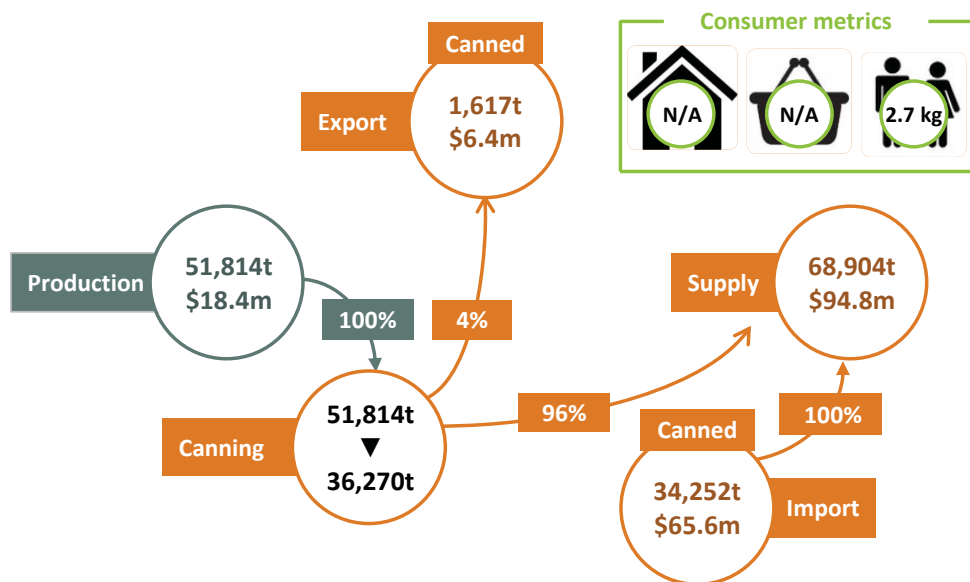
Canned Fruit is a combination of fruits from different categories, predominantly pineapples, peaches and pears. The majority of the fruit grown for this category are found around Australia typically within close proximity to canning processors.

For the year ending June 2020:

- **51,814 t** of fresh fruit was produced for canning.
- The value of production of the fresh fruit grown for canning was **\$18.4 m**, while the wholesale value of the canned supply was **\$94.8 m**.
- The supply per capita was **2.7 kg**, based on the volume supplied.



## Canned Fruit Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Canned Production (t)	42,910	39,791	-7%	36,270	-9%
Production (\$m)	\$ 26.4	\$ 19.3	-27%	\$ 18.4	-5%
Production area (Ha)	-	-	-	-	-
Canned Export Volume (t)	727	1,310	+80%	1,617	+23%
Canned Export Value (\$m)	\$ 6.7	\$ 9.2	+38%	\$ 6.4	-31%
Canned Import Volume (t)	32,633	33,137	+2%	34,252	+3%
Canned Import Value (\$m)	\$ 57.4	\$ 57.7	<1%	\$ 65.6	+14%
Canned Supply (t)	74,816	71,618	-4%	68,904	-4%
Supply Wholesale Value (\$m)	\$ 164.0	\$ 175.8	+7%	\$ 94.8	-46%
Supply per Capita (kg)	3.00	2.84	-5%	2.67	-6%

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

## Major Canned Fruit Production Areas

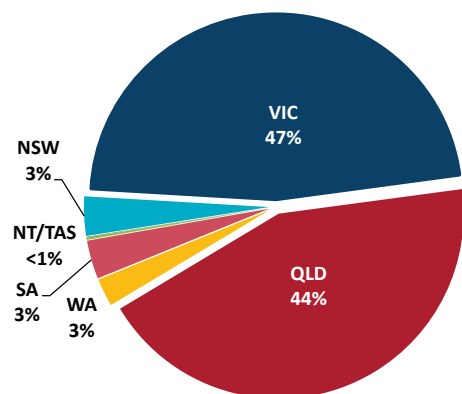


Source: (Freshlogic Analysis)



## Canned Fruit

### 2019/20 Canned Fruit Production by State



Source: (Freshlogic Analysis)

### Fresh Fruit Production for Canning—Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,777												
Victoria	24,325												
Queensland	22,556												
Western Australia	1,266												
South Australia	1,750												
Tasmania	109												
Northern Territory	30												
Availability legend		<div style="display: flex; justify-content: space-around;"> <span>High</span> <span>Medium</span> <span>Low</span> <span>None</span> </div>											

Source: (Freshlogic Analysis)

## Main Canned Fruit Products

There are a number of categories of tree fruits grown for canning in Australia and consists mainly of 3 main types for the year ending 2019. These include:

**Pineapples** account for **34%** of canned fruit processing for the year.

**Summerfruit** including peaches, apricots, and plums from the **Goulburn** region accounted for **32%** of canned fruit production.

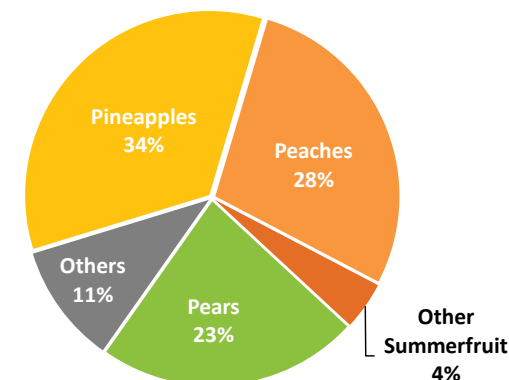
**Pears** account for **23%** of the fruit grown for canning in Australia.

**Other fruit** account for **11%** of the remaining canned fruit.



## Canned Fruit

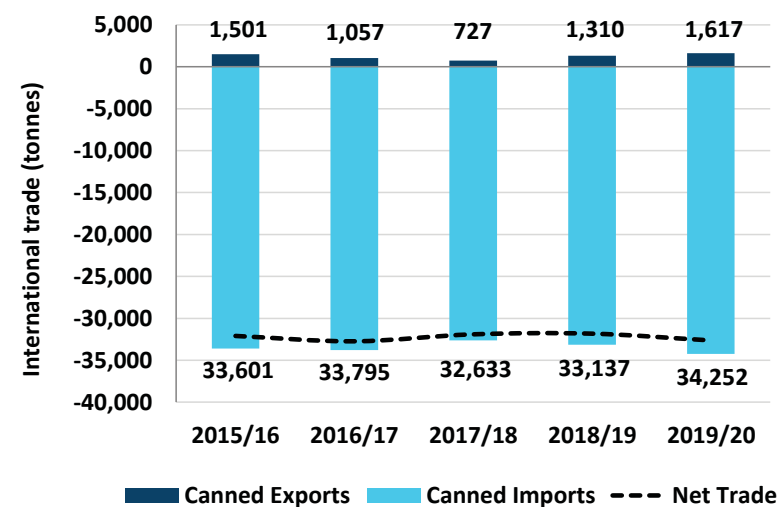
### 2019/20 Main Canned Fruit Products



Source: (Freshlogic Analysis)

## Processed Canned Fruit International Trade

For the year ending June 2020, Australia imported **34,252 tonnes** of canned fruit. The exports and imports of canned fruit over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA



## Olives Overview

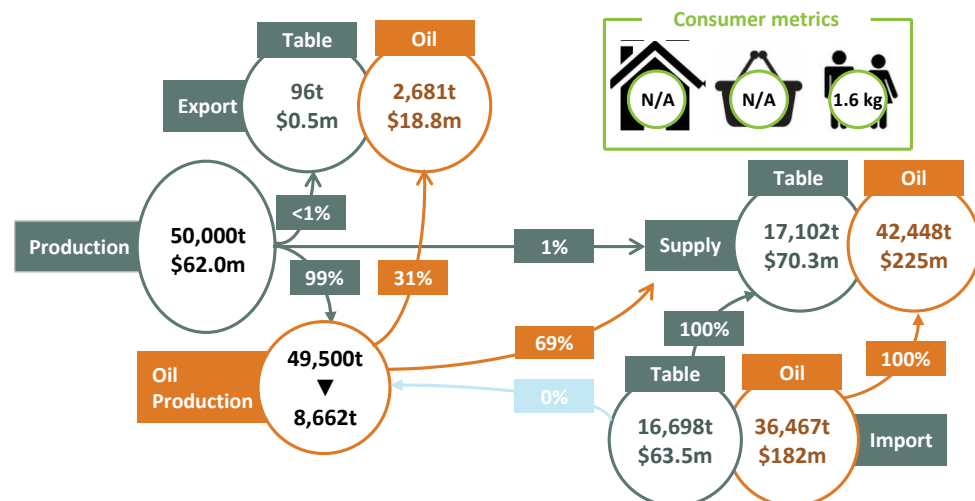
Olives are grown in many states of Australia, with the majority of production being grown in Victoria. Almost all olives grown in Australia are grown for the production of olive oil, with some grown for use as table olives. Both forms are profiled below.



For the year ending June 2020:

- **50,000 t** of fresh olives were produced, **99%** or **49,500 t** of which were extracted for oil, producing **8,662 tonnes** equivalent to **9.17 million litres** of olive oil.
- The value of production of olives was **\$62 m**, while the wholesale value of the oil supply was **\$225 m** and the wholesale value of the table supply was **\$70.3 m**.
- The consumption of olive oil per capita was **1.6 kg**, based on the volume supplied.

## Olive Oil/Table Olive Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	55,000	125,000	>100%	50,000	-60%
Production (\$m)	\$ 71.9	\$ 155.0	>100%	\$ 62.0	-60%
Production area (Ha)	20,568	20,568	-	20,568	-
Olive Oil Export Volume (t)	3,679	2,304	-37%	2,681	+16%
Olive Oil Export Value (\$m)	\$ 25.0	\$ 16.1	-36%	\$ 18.8	+17%
Olive Oil Import Volume (t)	28,478	33,274	+17%	36,467	+10%
Olive Oil Import Value (\$m)	\$ 178.8	\$ 185.0	+3%	\$ 181.8	-2%
Olive Oil Supply (t)	34,189	50,707	+48%	42,448	-16%
Olive Oil Wholesale Value (\$m)	\$ 230.3	\$ 324.3	+41%	\$ 224.6	-31%
Oil Consumption per Capita (kg)	1.37	2.01	+47%	1.65	-18%

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

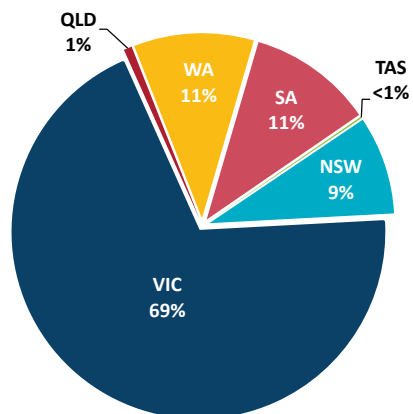
## Major Olive Production Areas



Source: AOA



## 2019/20 Olives Production by State



Source: AOA

## Fresh Olive Production —Seasonality by State

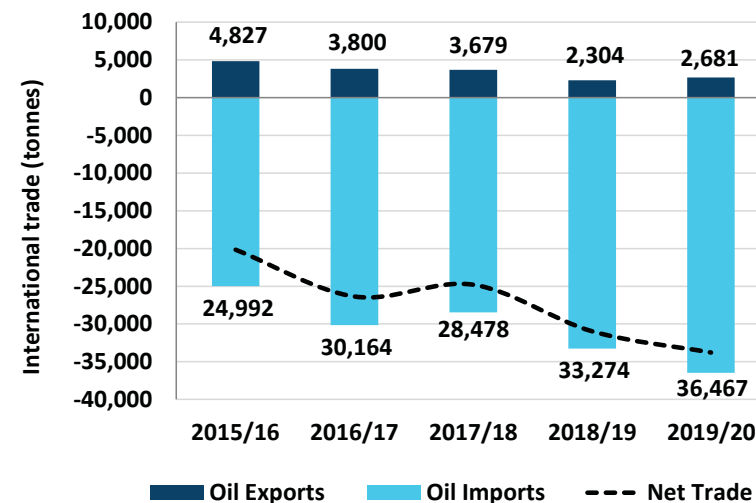
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	4,300												
Victoria	34,575												
Queensland	360												
Western Australia	5,250												
South Australia	5,450												
Tasmania	65												
Availability legend			High		Medium		Low						None

Source: AOA



## Olive Oil International Trade

For the year ending June 2020, Australia imported **36,467 tonnes** of olive oil (**this number does not include table olives**). The exports and imports of olive oil over the last 5 financial years are profiled in the graph below, where imports are counted as negative tonnes.



Source: GTA

