



Australian Horticulture Statistics Handbook 2019/20

VEGETABLES

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The Australian Horticulture Statistics Handbook 2019/20 has been funded by Horticulture Innovation Australia Limited using the across industry levy and funds from the Australian Government.

This Handbook is an analysis that combines all available data on production, international trade, processing volumes and fresh market distribution in order to produce statistics on 75 horticultural categories over the year ending 30 June 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 processors¹.

See pages 10 to 12 under 'research method' for a detailed description on this Handbook's methodology.

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

This publication covers the year ending 30 June 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

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 ²	Metres squared (a measure of area)
m m ²	Million metres squared (a measure of area)
ML	Mega Litres (1 million litres)
N/A	Not Available
t	Tonnes (1 thousand kilograms)

States

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

Countries

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

Definitions

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

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

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

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

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

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

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

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

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

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

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

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

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

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*.

Research Method

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.

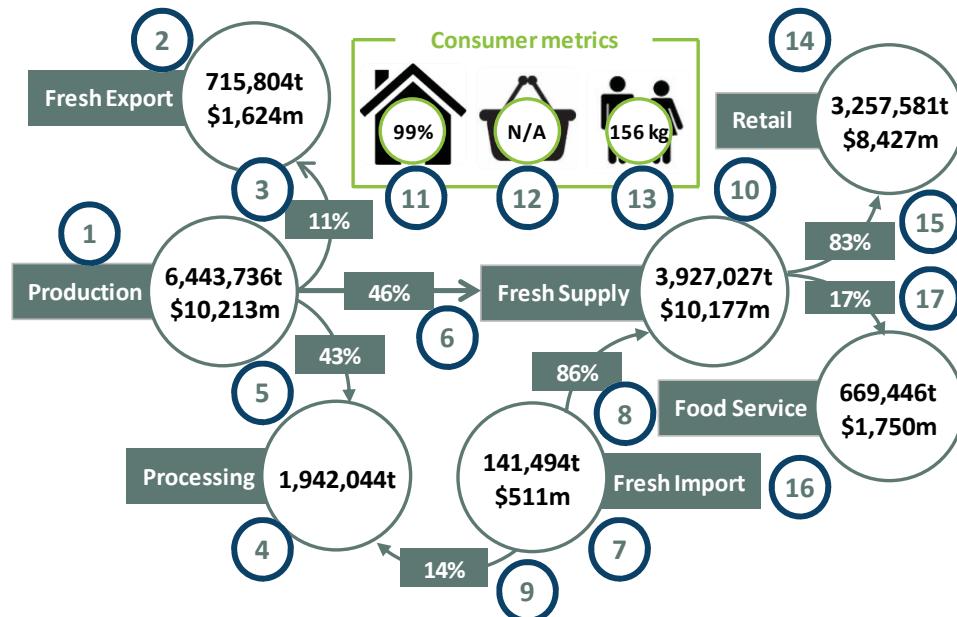
*ABS, Australian Demographic Statistics cat. no. 3101.0

**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:

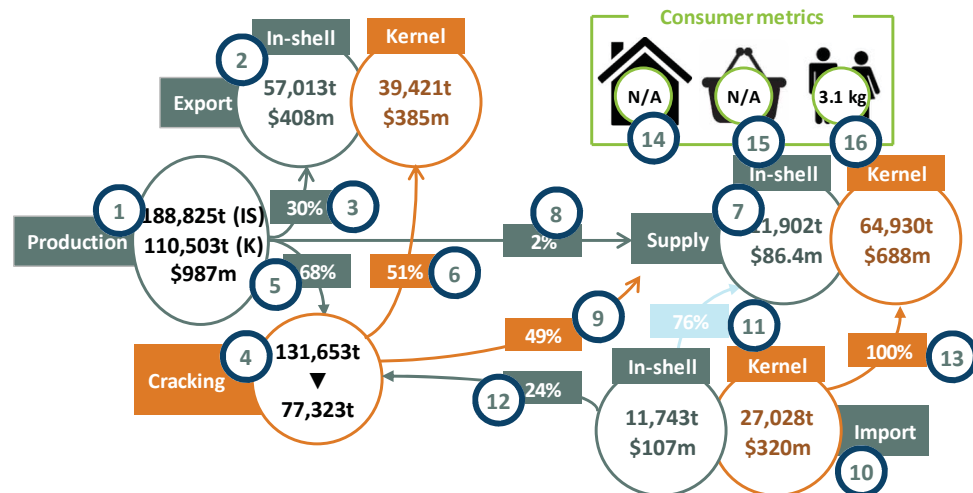


- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2020. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
- 2. 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:



- 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**.
- 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.
- In-Shell* Export Share.** The percentage share of *In-Shell* production that was exported.
- 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.
- Cracking Share.** The percentage share of *In-Shell* production that was cracked.

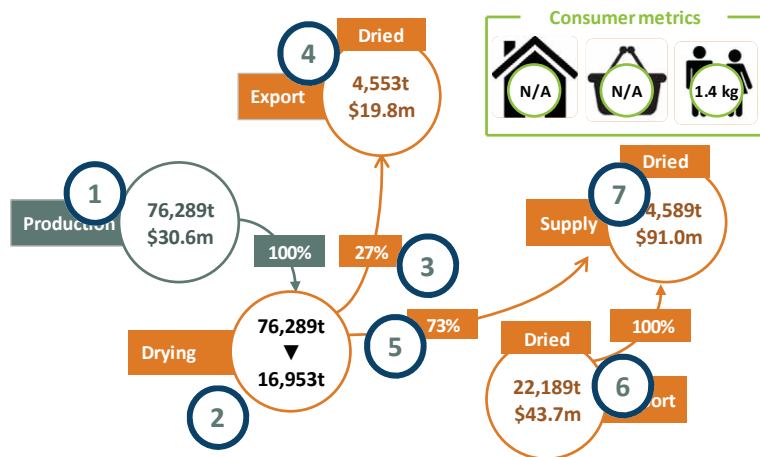
- Kernel* Export Share.** The percentage share of cracked *Kernel* that was exported.
- Supply.** This is the volume of the category available to the Australian market. It includes both **Production** that was sold into the market, as well as Imports that were sold into the market. This profiles the **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.
- In-Shell* Supply Share.** The volume in tonnes of the *In-Shell* Production that was supplied to the market.
- Kernel* Supply Share.** The volume in tonnes of cracked *Kernel* that was supplied to the market.
- 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.
- In-Shell* Import Supply Share.** The percentage share of *In-Shell* imports that was sent to the Australian market.
- In-Shell* Import Cracking Share.** The percentage share of *In-Shell* imports that was sent to be cracked.
- Kernel* Import Supply Share.** The percentage share of *Kernel* imports that was sent to the Australian market.
- 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.
- 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.
- 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

<u>Abbreviation</u>	<u>Data Source</u>	<u>Further information</u>
ABS	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>
AC	Ausmarket Consultants	Wholesale pricing information from the Adelaide, Brisbane, Melbourne and Sydney wholesale markets.
CFVIWA	Chamber of Fruit and Vegetable Industries of Western Australia	Wholesale pricing information from the Perth wholesale market.
Freshlogic Analysis	THRUChain analysis— Freshlogic	Supply chain modelling system that aligns the volumes of production and international trade with the volumes distributed through processing and all domestic market channels.
GTA	IHS —Global Trade Atlas®	www.gtis.com/gta

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

Data sharing-List of projects

List of projects

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

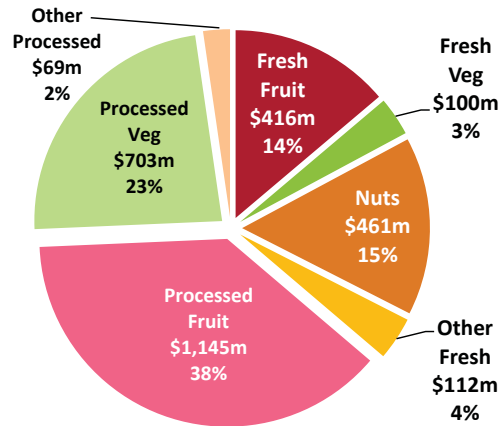
<u>Project Code</u>	<u>Project Title</u>
AL19005 (Almonds)	<i>Australian Almond Industry Statistics and Data collection 2020-2022</i>
AP16002 (Apple/Pear)	<i>Apple and Pear Crop Estimate</i>
AV20000 (Avocado)	<i>Avocado industry and market data capture and analysis</i>
CT18002 (Citrus)	<i>Citrus Market Development; Market Access and Quality</i>
CU15000 (Custard Apple)	<i>Custard Apple Dispatch System 2—CADS 2</i>
MC18003 (Macadamias)	<i>Macadamia Crop Forecasting 2020-2022</i>
MG17000 (Mangoes)	<i>Building best management practice capacity for the Australian mango industry</i>
MT15031 (Dried Grapes)	<i>Australian Dried Fruit Communications Program</i>
NY17008 (Nursery)	<i>Nursery Industry Statistics 2017/18 to 2019/20</i>
OL16001 (Olives)	<i>Australian Olive Industry Benchmarking Program</i>
PI17001 (Pineapples)	<i>Pineapple integrated crop protection program</i>

Data sharing-List of projects

<u>Project Code</u>	<u>Project Title</u>
TU17005 (Turf)	<i>Turf industry statistics 2017/18 to 2019/20</i>
TM17000 (Tomatoes)	<i>Processing Tomato Industry capacity building</i>
VG15077 (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.

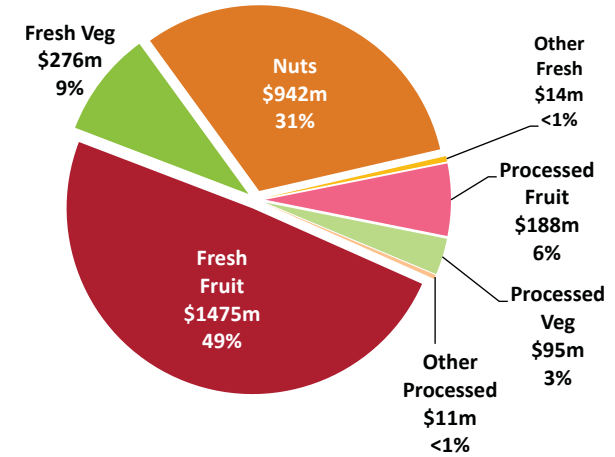


Sources: GTA; (Freshlogic Analysis)

Fresh Fruit	\$415.9m	Other Fresh Horticulture	\$112.0m
Grapes	\$85.1m	Cut Flowers	\$74.2m
Avocados	\$79.8m	Live Plants	\$19.4m
Kiwifruit	\$69.5m	Bulbs	\$18.4m
Fresh Vegetables	\$100.2m	Processed Fruit	\$1,145.5m
Garlic	\$41.6m	Olives and Olive Oil	\$245.3m
Asparagus	\$21.6m	Dried Grapes.....	\$67.7m
Mushrooms	\$13.8m	Dried Tree Fruits.....	\$50.1m
Nuts	\$462.6m	Processed Vegetables	\$703.1m
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.*

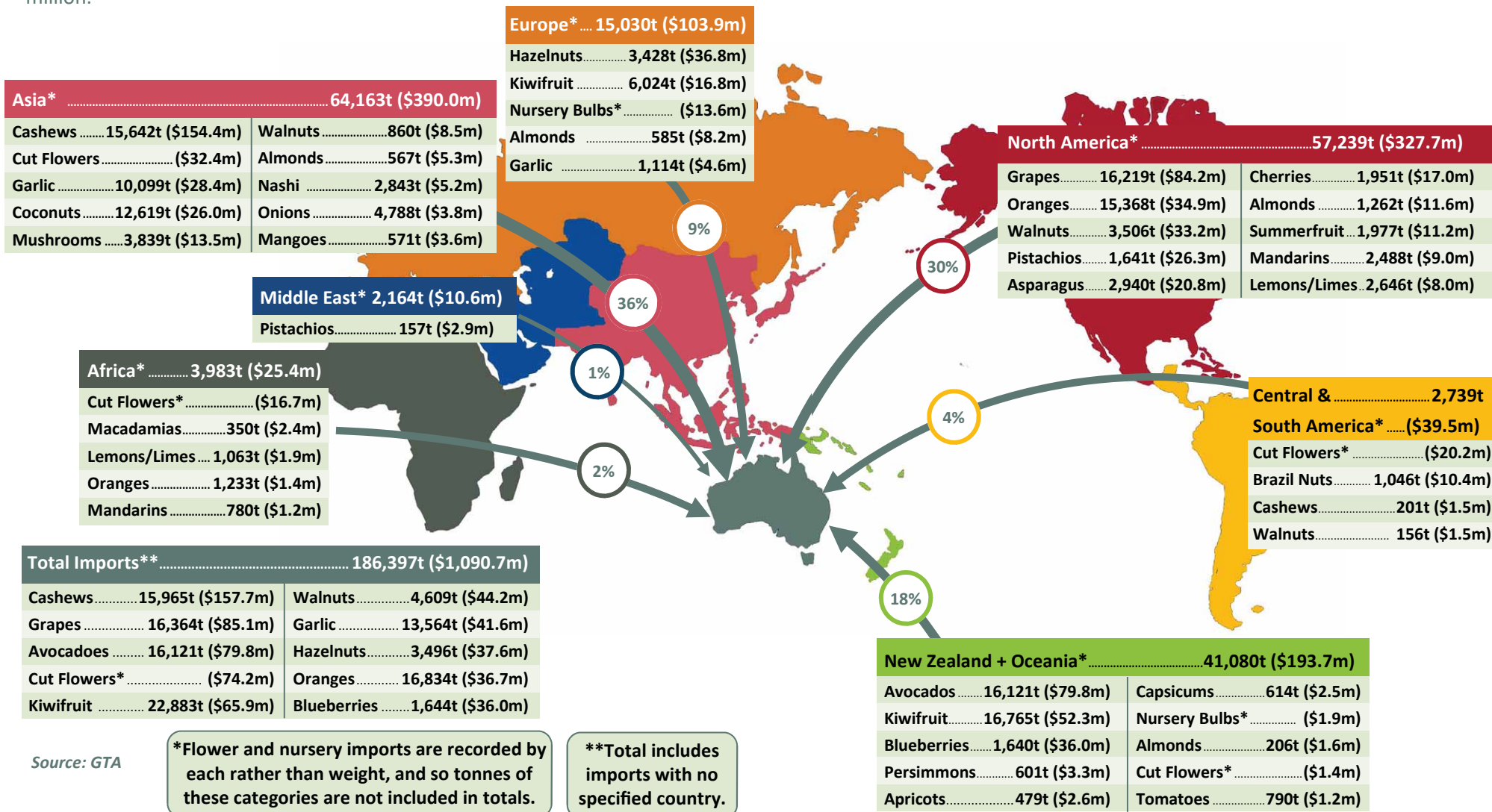


Sources: GTA; (Freshlogic Analysis)

Fresh Fruit	\$1,475.3m	Other Fresh Horticulture	\$14.3m
Table Grapes	\$622.9m	Cut Flowers.....	\$8.4m
Oranges.....	\$310.1m	Live Plants	\$5.9m
Mandarins.....	\$187.2m	Bulbs.....	\$0.1m
Fresh Vegetables	\$275.9m	Processed Fruit	\$188.1m
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
Nuts	\$942.5m	Processed Vegetables	\$95.3m
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.

Asia* 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)

Middle East* 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)

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

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 country.

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

Europe* 34,721t (\$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)	

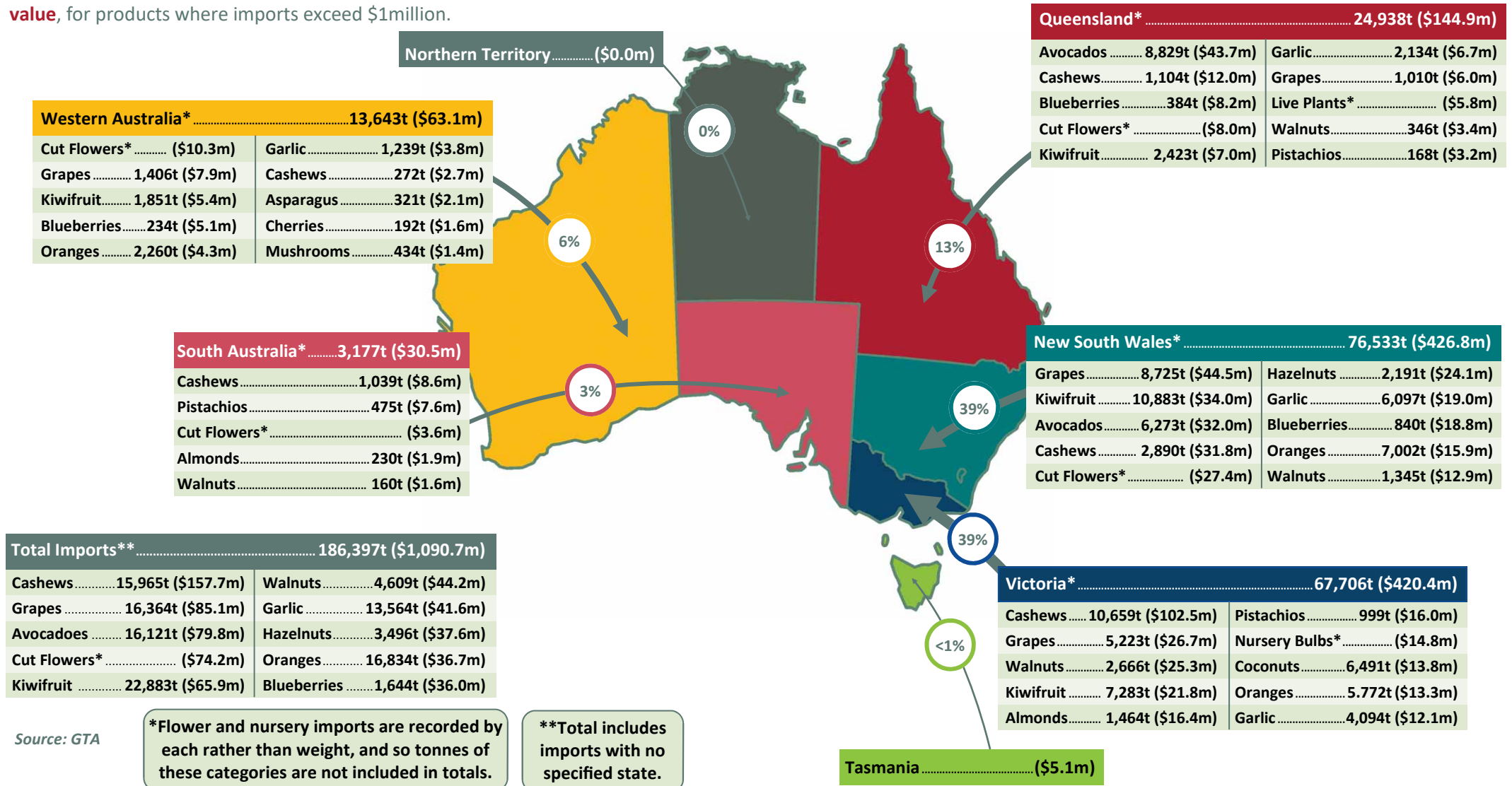
North America* 21,424t (\$90.1m)	
Macadamias.. 922t (\$25.4m)	Pears 1,385t (\$2.3m)
Almonds..... 3,049t (\$17.5m)	Mangoes..... 338t (\$1.8m)
Mandarins.. 6,058t (\$13.8m)	Cherries..... 91t (\$1.6m)
Oranges..... 7,264t (\$13.8m)	Cut Flowers* (\$1.5m)
Summerfruit... 812t (\$4.1m)	Pecans..... 141t (\$1.3m)

New Zealand + Oceania* 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.

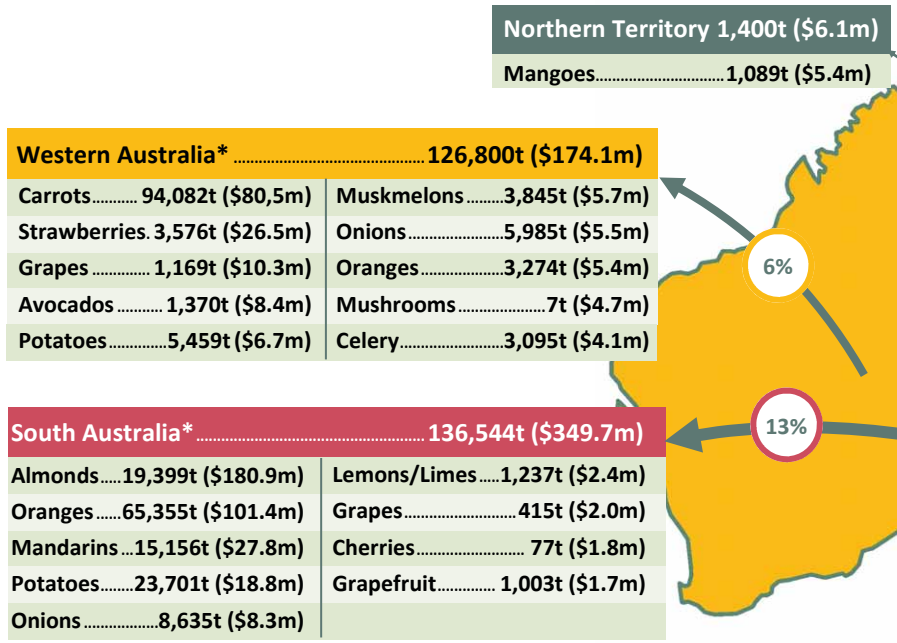
The relative share of the **value** of imports to each of the states is also profiled in the circle associated with each region. Note that the total value and volume for all states (located at the bottom left of the page) includes import information with no specified state, and therefore may exceed the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



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

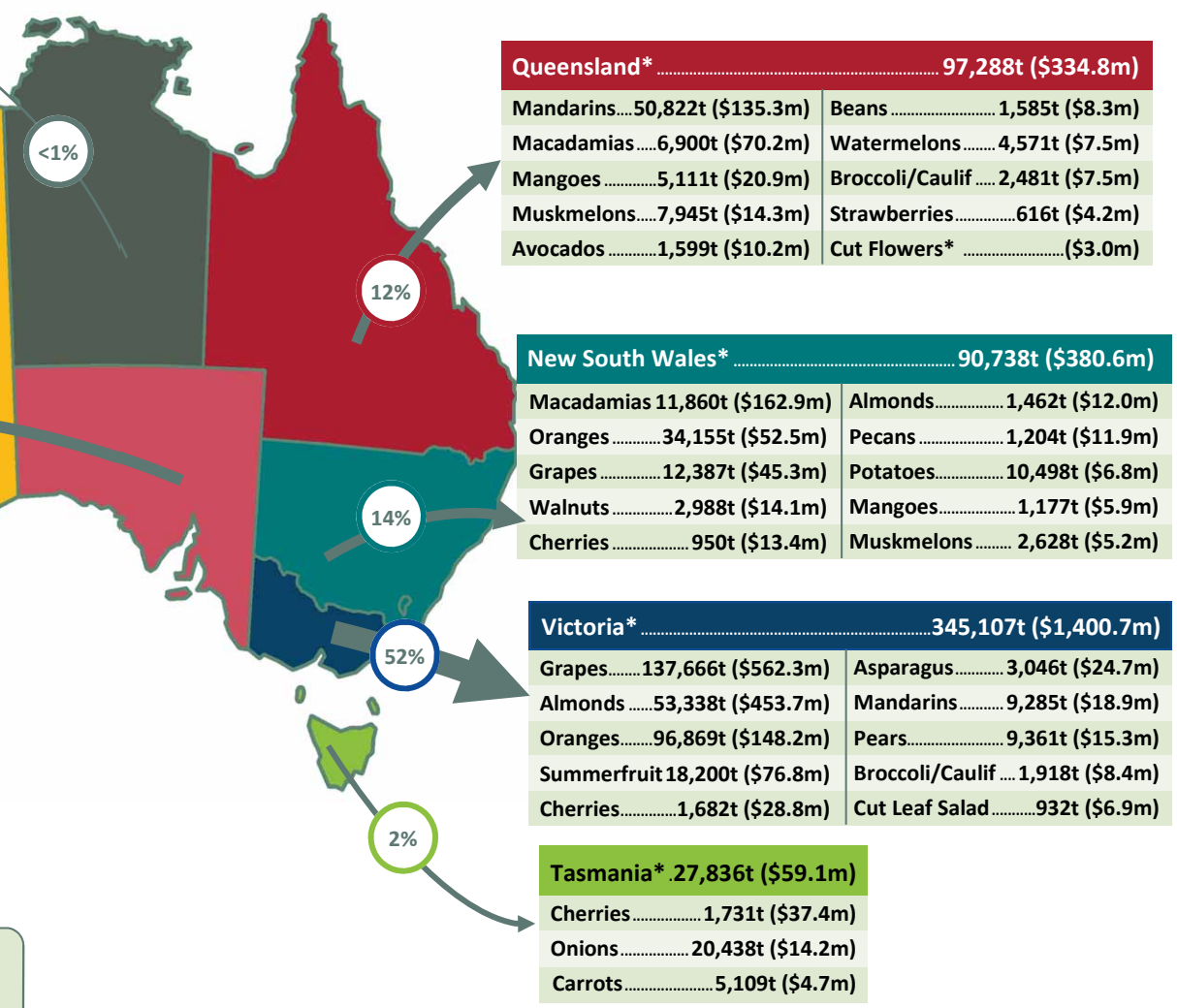
Source: GTA

*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.





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
All Fruit	2,574,347	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	All Vegetables	3,723,506
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	All Nuts	230,225
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	Other Horticulture	N/A
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
All Fruit	\$5,695.4	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	All Vegetables	\$4,851.3
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	All Nuts	\$1,377.7
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	Other Horticulture	\$3,136.2
Leeks	\$28.4	Cut Flowers	\$293.0
Head Lettuce	\$206.2	Nursery*	\$2,563.0
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)
All Horticultural Products	826,093
All Fruit	515,435
Apples	2,953
Avocados	4,051
Bananas	
Berries - Combined	5,084
Blueberries	393
Rubus Berries	13
Strawberries	4,678
Cherries	4,460
Citrus - Combined	284,667
Grapefruit	1,706
Lemons/Limes	4,206
Mandarins	77,316
Oranges	201,268
Custard Apples	71
Kiwifruit	605
Lychees	431
Mangoes	7,707
Melons - Combined	21,772
Muskmelons	14,887
Watermelons	6,885
Nashi	

Year Ending June 2020	Fresh Export Volume (t)
Passionfruit	
Papaya/Pawpaw	10
Persimmons	140
Pears	9,732
Pineapples	
Summerfruit - Combined	21,269
Apricots	885
Nectarines/Peaches	15,170
Plums	5,214
Table Grapes	152,180
Processing Fruit Combined*	
Dried Grapes*	
Prunes*	
Other Dried Tree Fruit*	
Canned Fruit*	
Olives*	
Other Fruit	303
All Vegetables	210,824
Artichokes	9
Asparagus	3,068
Beans	1,633
Beetroot	375
Broccoli/Baby Broccoli	5,169

Sources: GTA; IRB; (Freshlogic Analysis)

Year Ending June 2020	Fresh Export Volume (t)
Brussels Sprouts	263
Cabbage	1,294
Capsicums	506
Carrots	103,868
Cauliflower	705
Celery	5,132
Chillies	5
Cucumbers	81
Eggplant	7
Eng.Spinach/Silverbeet/Kale	256
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	
Ginger	25
Leafy Asian Vegetables	
Leafy Salad Vegetables	1,345
Leeks	98
Head Lettuce	427
Mushrooms	72
Onions	36,480
Parsnips	
Peas	6

Year Ending June 2020	Fresh Export Volume (t)
Potatoes	40,249
Pumpkins	3,256
Sweet Corn	
Sweetpotatoes	2,371
Tomatoes	658
Zucchini	
Other Vegetables	3,467
All Nuts*	99,835
Almonds*	74,299
Chestnuts*	7
Hazelnuts*	6
Macadamias*	18,828
Pecans*	1,371
Pistachios*	597
Walnuts*	3,036
Other Nuts*	1,692
Other Horticulture	N/A
Cut Flowers	N/A
<i>Nursery*</i>	<i>N/A</i>
Turf	N/A

*Note: Nut exports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 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	
All Fruit	\$1,475.3	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	All Vegetables	\$275.9
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	All Nuts*	\$942.5
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	Other Horticulture	\$14.3
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)	Year Ending June 2020	Fresh Import Volume (t)
All Horticultural Products	186,397	Passionfruit	
All Fruit	108,263	Papaya/Pawpaw	86
Apples	786	Persimmons	602
Avocados	16,121	Pears	
Bananas		Pineapples	
Berries - Combined	1,648	Summerfruit - Combined	2,549
Blueberries	1,644	Apricots	484
Rubus Berries		Nectarines/Peaches	1,717
Strawberries	4	Plums	348
Cherries	1,954	Table Grapes	16,364
Citrus - Combined	25,122	Processing Fruit Combined*	
Grapefruit	1,022	Dried Grapes*	
Lemons/Limes	3,902	Prunes*	
Mandarins	3,360	Other Dried Tree Fruit*	
Oranges	16,834	Canned Fruit*	
Custard Apples		Olives*	
Kiwifruit	22,883	<i>Other Fruit</i>	16,318
Lychees		All Vegetables	32,845
Mangoes	838	Artichokes	1
Melons - Combined	155	Asparagus	3,068
Muskmelons		Beans	559
Watermelons	155	Beetroot	8
Nashi	2,843	Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2020	Fresh Import Volume (t)	Year Ending June 2020	Fresh Import Volume (t)
Brussels Sprouts		Potatoes	
Cabbage		Pumpkins	13
Capsicums	695	Sweet Corn	
Carrots		Sweetpotatoes	795
Cauliflower		Tomatoes	790
Celery		Zucchini	
Chillies	7	<i>Other Vegetables</i>	2,180
Cucumbers		All Nuts*	45,288
Eggplant		Almonds*	2,624
Eng.Spinach/Silverbeet/Kale		Chestnuts*	66
Fresh Herbs - Combined		Hazelnuts*	3,496
Fennel		Macadamias*	570
Parsley and Other Herbs		Pecans*	
Garlic	13,564	Pistachios*	1,955
Ginger	204	Walnuts*	4,609
Leafy Asian Vegetables		<i>Other Nuts*</i>	31,969
Leafy Salad Vegetables	23	Other Horticulture	N/A
Leeks		Cut Flowers	N/A
Head Lettuce	3	<i>Nursery*</i>	<i>N/A</i>
Mushrooms	3,874	Turf	N/A
Onions	6,298		
Parsnips			
Peas	764		

**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	
All Fruit	\$415.9	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		All Vegetables	\$100.2
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		All Nuts*	\$462.6
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	Other Horticulture	\$112.0
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
All Fruit	1,673,661	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	<i>Other Fruit</i>	6,760
Lychees	2,003	All Vegetables	2,242,095
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	<i>Other Vegetables</i>	24,523
Cucumbers	90,652	All Nuts	118,411
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	<i>Other Nuts</i>	33,648
Leafy Salad Vegetables	56,205	Other Horticulture	N/A
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
All Fruit	\$5,406.4	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	All Vegetables	\$5,203.8
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	All Nuts	\$1,454.3
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	Other Horticulture	\$3,351.2
Leeks	\$32.9	Cut Flowers	\$385.3
Head Lettuce	\$241.3	Nursery*	\$2,685.7
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

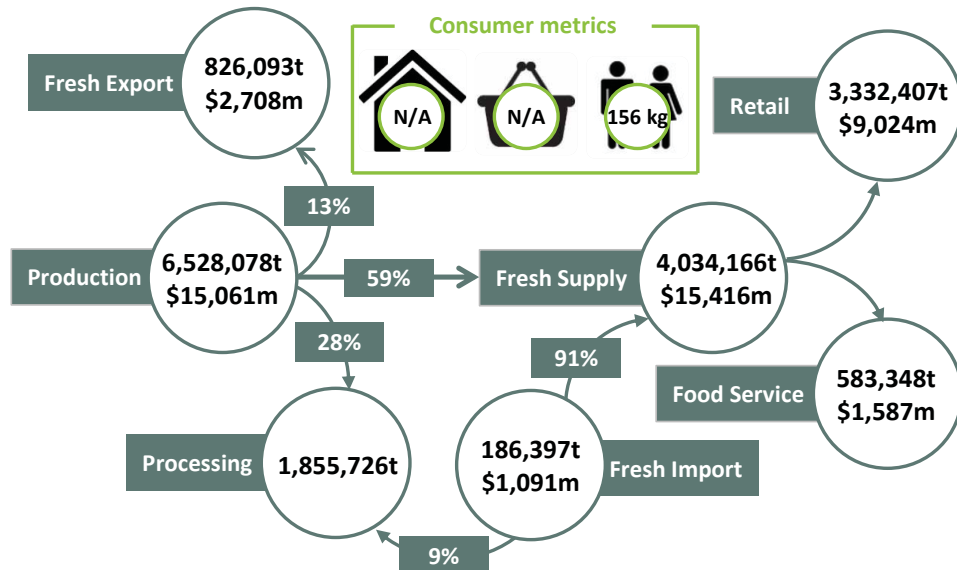
Pages 52-55 profile total horticultural production and trade. It combines information on fruit, vegetables, nuts and other horticultural categories (cut flowers, nursery and turf).



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)

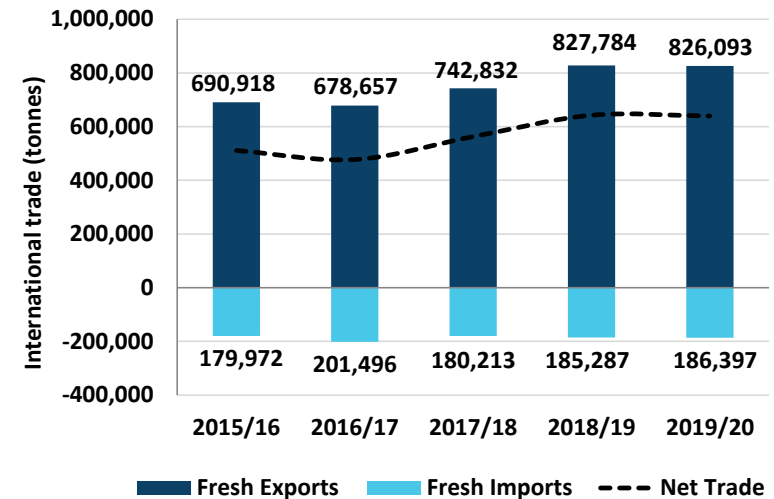


Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,506,062	6,624,791	+2%	6,528,078	-1%
Production (\$m)	\$13,244.0	\$14,391.0	+9%	\$15,060.7	+5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	742,832	827,784	+11%	826,093	>-1%
Fresh Export Value (\$m)	\$ 2,079.9	\$ 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

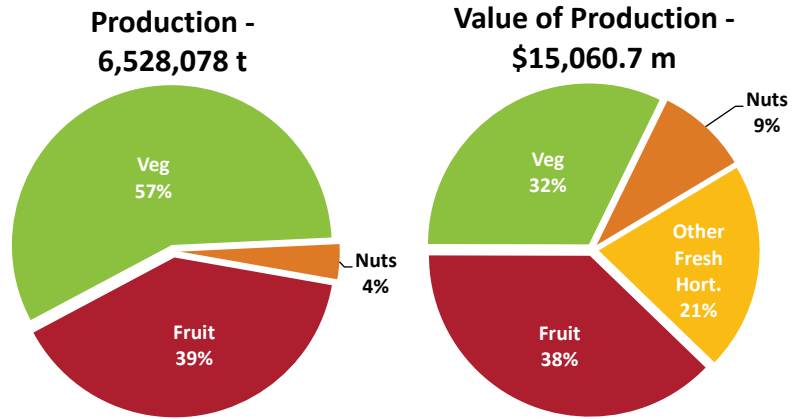


Source: GTA



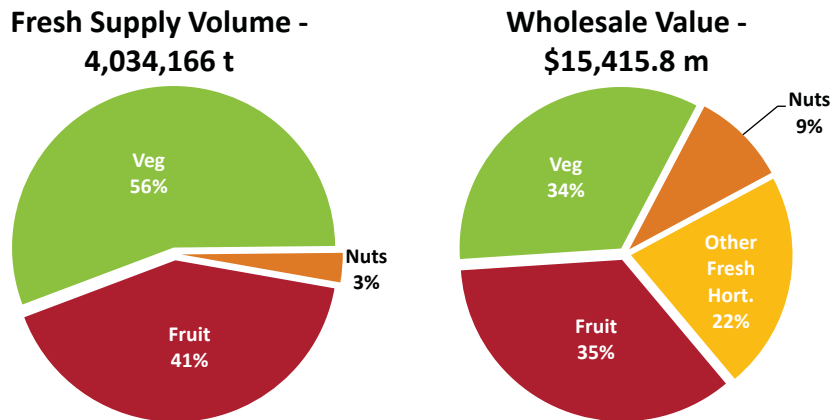
Production

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.



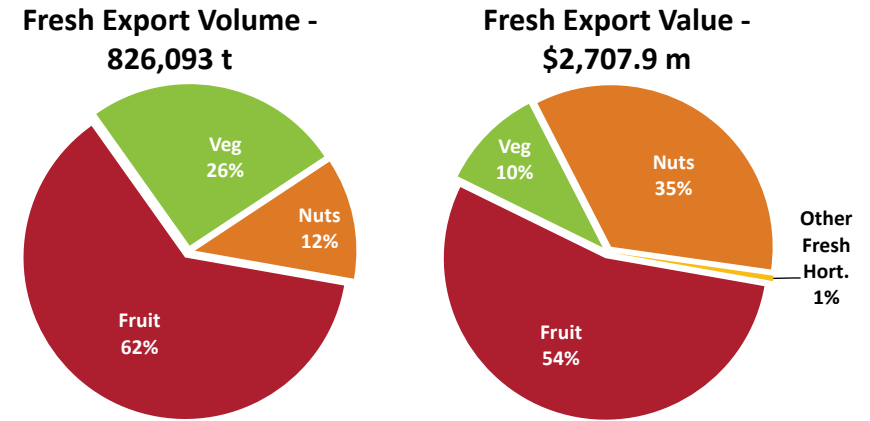
Fresh supply

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



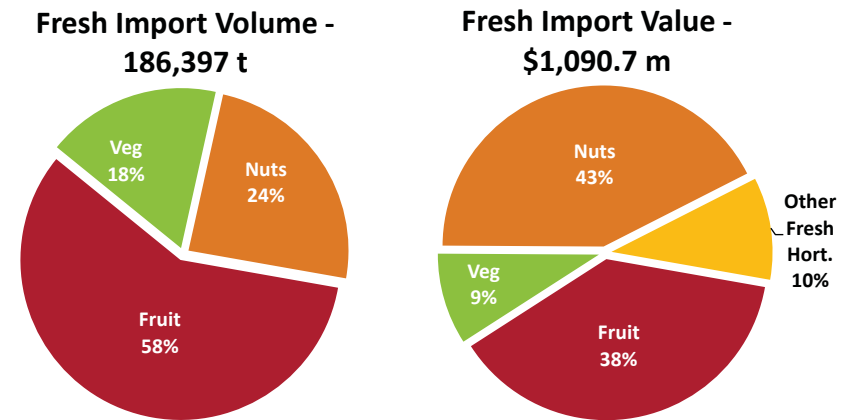
Fresh exports

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.





Overview

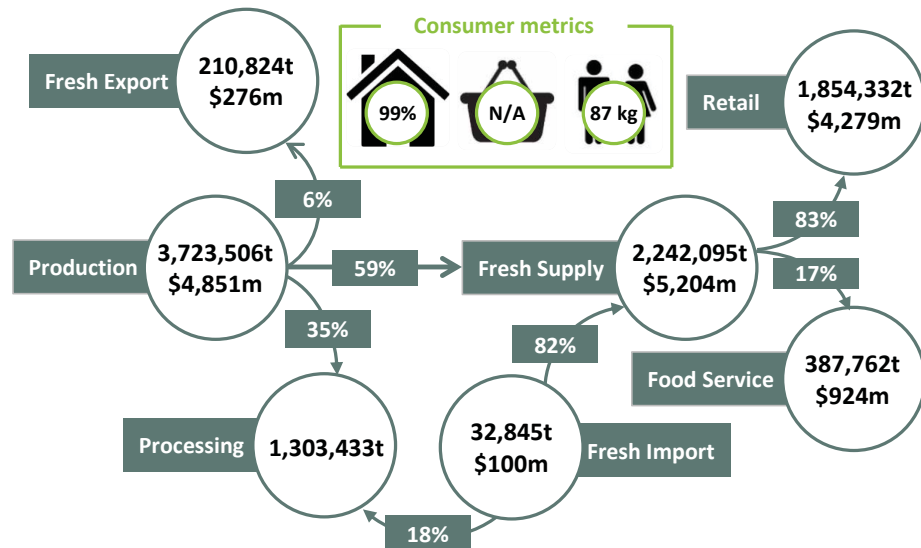
Pages 238-239 profile total vegetable production and trade. It combines information on all vegetable categories covered in this handbook.

For the year ending June 2020:

- **3.7 million tonnes** produced and valued at **\$4,849 million**.
 - The wholesale value of the fresh supply was **\$5,204 million**, with **\$4,279 million** distributed into retail and **\$924 million** into food service.
 - The supply per capita was **87 kg**, based on the volume supplied.
- *'Other Vegetables' are included in the calculation of the category overview totals but have not been profiled separately.*



All Fresh Vegetables Supply Chain—Year Ending June 2020



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



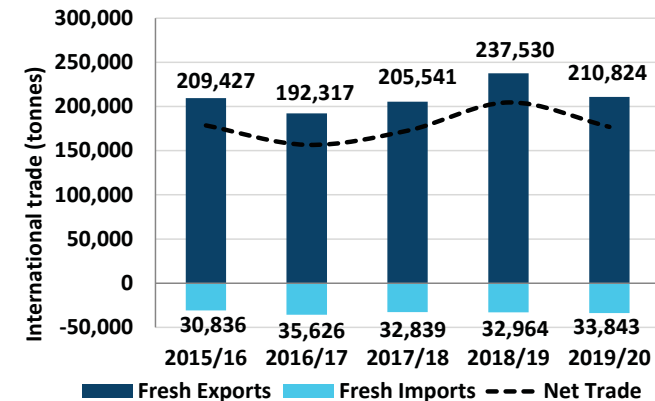
Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,696,393	3,723,512	<1%	3,723,506	>-1%
Production (\$m)	\$ 4,346.9	\$ 4,724.3	+9%	\$ 4,851.3	+3%
Production area (Ha)	93,592	-	-	-	-
Fresh Export Volume (t)	205,541	237,527	+16%	210,824	-11%
Fresh Export Value (\$m)	\$ 254.7	\$ 292.2	+15%	\$ 275.9	-6%
Fresh Import Volume (t)	32,130	31,935	>-1%	32,845	+3%
Fresh Import Value (\$m)	\$ 84.2	\$ 89.1	+6%	\$ 100.2	+12%
Fresh Supply (t)	2,214,007	2,220,252	<1%	2,242,095	<1%
Fresh Supply Wholesale Value (\$m)	\$ 4,620.8	\$ 5,010.1	+8%	\$ 5,203.8	+4%
Supply per Capita (kg)	88.80	88.09	>-1%	86.90	-1%
Retail Supply (t)	-	1,782,217	-	1,854,332	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 3,963.9	-	\$ 4,279.4	+8%
Food Service Supply (t)	-	438,035	-	387,762	-11%
Food Service Wholesale Value (\$m)	\$ -	\$ 1,046.1	-	\$ 924.4	-12%

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

All Fresh Vegetables International Trade

Australia is a net exporter of fresh vegetables. For the year ending June 2020 Australia exported **237,530 tonnes** of fresh vegetables, as profiled in the graph below, where exports are counted as negative tonnes.

Net All Fresh Vegetables International Trade



Source: GTA



Fresh Artichoke Overview

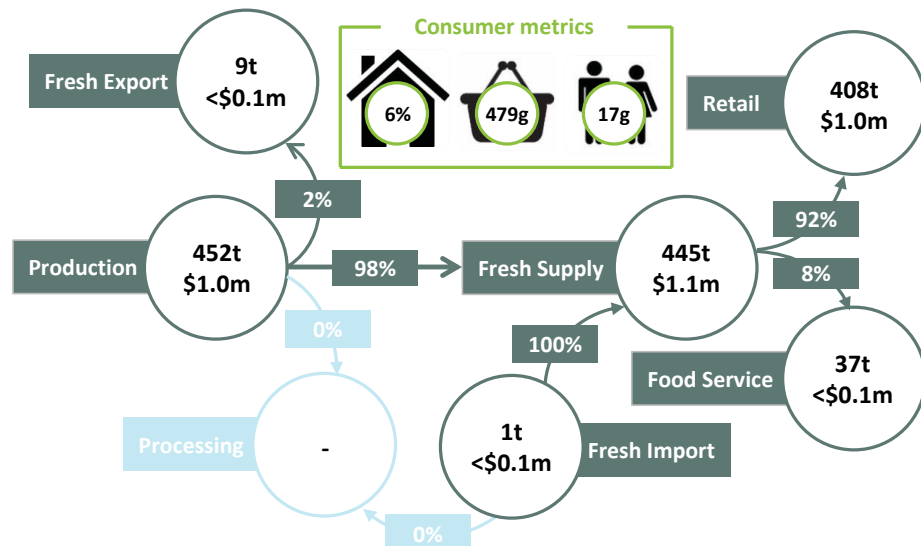
In this report, 'artichokes' refers only to globe artichokes. It does not cover Jerusalem Artichokes. Artichoke production occurs predominantly in Victoria, with other states producing smaller quantities. The majority of artichokes grown in Australia are destined for the fresh market, with a small export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



For the year ending June 2020:

- **452 tonnes** was produced and valued at **\$1.0 m**.
- The wholesale value of the fresh supply was **\$1.1 m**, with **\$1.0 m** distributed into retail and **\$0.1 m** into food service.
- **6%** of Australian households purchased artichokes, buying an average of **479 g** of artichokes per shopping trip.
- The supply per capita was **17 g**, based on the volume supplied.

Fresh Artichoke Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	402	449	+12%	452	<1%
Production (\$m)	\$ 1.0	\$ 0.9	-5%	\$ 1.0	+10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5	6	+14%	9	+45%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-9%	< \$0.1	+64%
Fresh Import Volume (t)	-	<1	-	1	>100%
Fresh Import Value (\$m)	\$ -	< \$0.1	-	< \$0.1	>100%
Fresh Supply (t)	397	443	+12%	445	<1%
Fresh Supply Wholesale Value (\$m)	\$ 1.1	\$ 1.0	-5%	\$ 1.1	+8%
Supply per Capita (kg)	0.02	0.02	+10%	0.02	-2%
Retail Supply (t)	-	403	-	408	+1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 0.9	-	\$ 1.0	+9%
Food Service Supply (t)	-	40	-	37	-9%
Food Service Wholesale Value (\$m)	\$ -	\$ 0.1	-	\$ 0.1	-2%

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

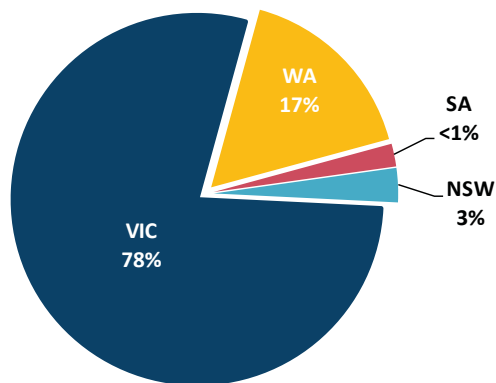
Major Artichoke Production Areas



Source: AUSVEG



2019/20 Fresh Artichokes Production by State



Source: AUSVEG

Fresh Artichokes Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	14	High	High	High	Medium	Low	None	None	None	None	None	None	None
Victoria	355	High	High	High	High	Medium	Low	None	None	None	None	None	None
Western Australia	75	High	High	High	Medium	Low	None	None	None	None	None	None	None
South Australia	9	High	High	High	Medium	Low	None	None	None	None	None	None	None
Availability legend		High	High	High	Medium	Medium	Low	Low	Low	None	None	None	None

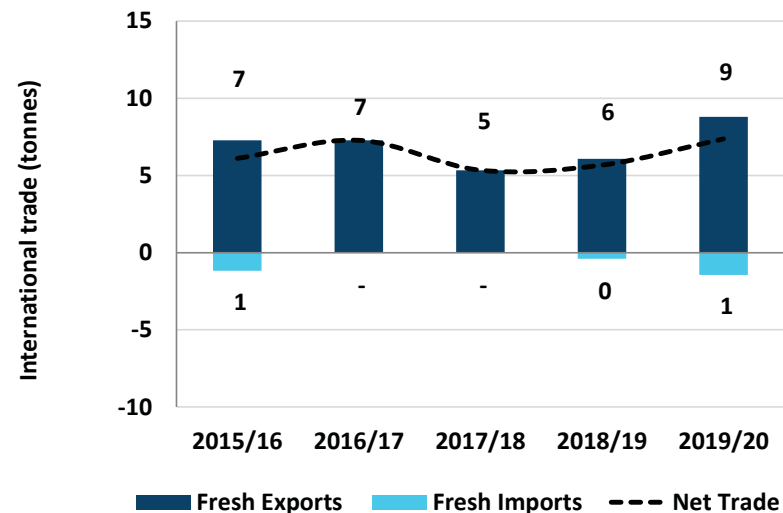
Source: AUSVEG

Fresh Artichokes International Trade

There is minimal trade of artichokes, with Australia only occasionally importing small volumes, and typically exporting between **5-10 tonnes** every year. For the year ending June 2020, Australia exported **9 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.



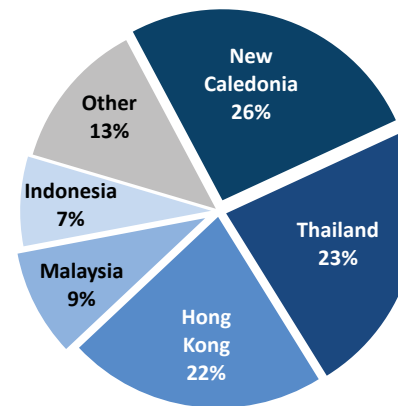
Net Fresh Artichokes International Trade



Source: GTA

For the year ending June 2020, **26%** of exported fresh artichokes were sent to New Caledonia, as profiled in the chart below.

2019/20 Fresh Artichokes Exports by Country



Source: GTA



Fresh Artichokes 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	-	-	1	New South Wales	1	2	4
New South Wales	-	< 0.5	< 0.5	Victoria	3	3	4
Other	-	< 0.5	< 0.5	Queensland	1	1	1
TOTAL	-	0	1	Western Australia	-	-	< 0.5
				Other	-	-	< 0.5
				TOTAL	5	6	9

Fresh Artichokes 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
Egypt	-	< 0.5	1	New Caledonia	2	2	2
Other	-	< 0.5	-	Thailand	< 0.5	1	2
TOTAL	-	0	1	Hong Kong	< 0.5	1	2
				Malaysia	1	< 0.5	1
				Indonesia	1	< 0.5	1
				Other	2	2	1
				TOTAL	5	6	9

Source: GTA





Fresh Asparagus Overview

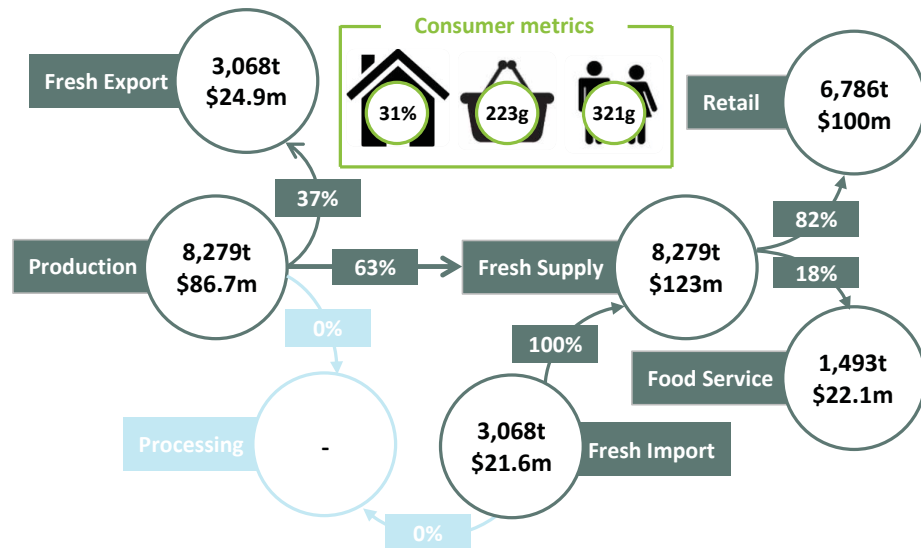
Asparagus production occurs predominantly in Victoria. There are typically two asparagus harvests: a spring cut, mainly destined for the export market, and a summer cut, primarily destined for the domestic market. There is minimal processing of local production, due to the low cost of imported product.



For the year ending June 2020:

- **8,279 t** produced and valued at **\$86.7 m**.
- The wholesale value of the fresh supply was **\$122.6 m**, with **\$100.5 m** distributed into retail and **\$22.1 m** into food service.
- **31%** of Australian households purchased asparagus, buying an average of **223 g** of asparagus per shopping trip.
- The supply per capita was **321 g**, based on the volume supplied.

Fresh Asparagus Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,576	10,237	+35%	8,279	-19%
Production (\$m)	\$ 61.0	\$ 86.6	+42%	\$ 86.7	<-1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,711	3,799	+2%	3,068	-19%
Fresh Export Value (\$m)	\$ 27.8	\$ 29.8	+7%	\$ 24.9	-16%
Fresh Import Volume (t)	4,272	4,092	-4%	3,068	-25%
Fresh Import Value (\$m)	\$ 22.3	\$ 25.0	+12%	\$ 21.6	-13%
Fresh Supply (t)	8,138	10,530	+29%	8,279	-21%
Fresh Supply Wholesale Value (\$m)	\$ 92.4	\$ 118.0	+28%	\$ 122.6	+4%
Supply per Capita (kg)	0.33	0.42	+28%	0.32	-23%
Retail Supply (t)	-	8,424	-	6,786	-19%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 94.4	-	\$ 100.5	+6%
Food Service Supply (t)	-	2,106	-	1,493	-29%
Food Service Wholesale Value (\$m)	\$ -	\$ 23.6	-	\$ 22.1	-6%

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

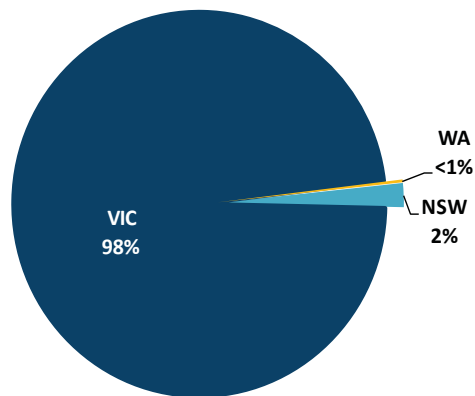
Major Asparagus Production Areas



Source: AUSVEG



2019/20 Fresh Asparagus Production by State



Source: AUSVEG

Fresh Asparagus Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	167												
Victoria	8,092												
Western Australia	20												
Imported	3,068												
Availability legend		High		Medium		Low							None

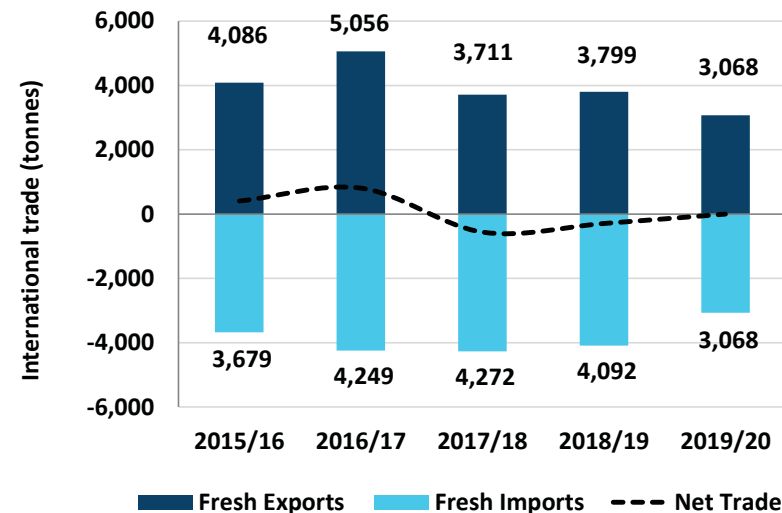
Source: AUSVEG

Fresh Asparagus International Trade

Australia has traditionally been a net exporter of fresh asparagus, typically exporting between **3,000-5,000 tonnes** per year. For the year ending June 2020, Australia imported **3,068 tonnes**, and exported **3,068 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.



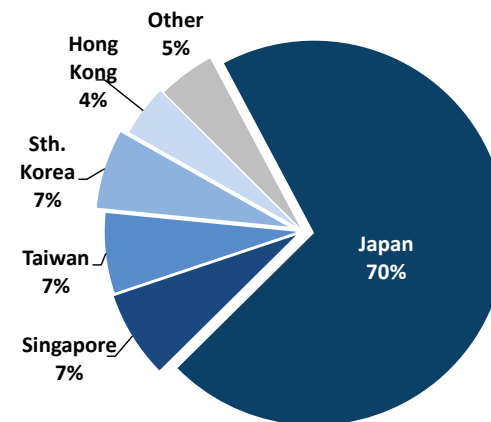
Net Fresh Asparagus International Trade



Source: GTA

For the year ending June 2020, **70%** of exported fresh asparagus was sent to Japan, as profiled in the chart below.

2019/20 Fresh Asparagus Export by Country



Source: GTA



Fresh Asparagus 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	2,279	2,092	1,607	Victoria	3,672	3,747	3,046
Victoria	928	849	652	New South Wales	34	31	12
Queensland	593	659	487	Queensland	5	10	3
Western Australia	472	493	321	South Australia	-	< 0.5	2
Other	-	< 0.5	< 0.5	Western Australia	-	1	< 0.5
TOTAL	4,272	4,092	3,068	Other	< 0.5	10	5
				TOTAL	3,711	3,799	3,068

Fresh Asparagus 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
Mexico	3,074	3,108	2,899	Japan	2,792	2,687	2,159
Thailand	10	19	62	Singapore	297	347	223
Peru	1,008	918	61	Taiwan	257	220	206
US	172	42	42	Sth. Korea	90	142	202
New Zealand	2	-	4	Hong Kong	217	247	131
Other	6	5	0	Other	59	156	146
TOTAL	4,272	4,092	3,068	TOTAL	3,711	3,799	3,068

Source: GTA

Processed Asparagus International Trade

For the year ending June 2020, an additional **1,235 tonnes** of preserved asparagus were imported, while **4 tonnes** were exported. These volumes have not been included in the fresh imports and exports profiled on page 246.



Source: GTA





Fresh Beans Overview

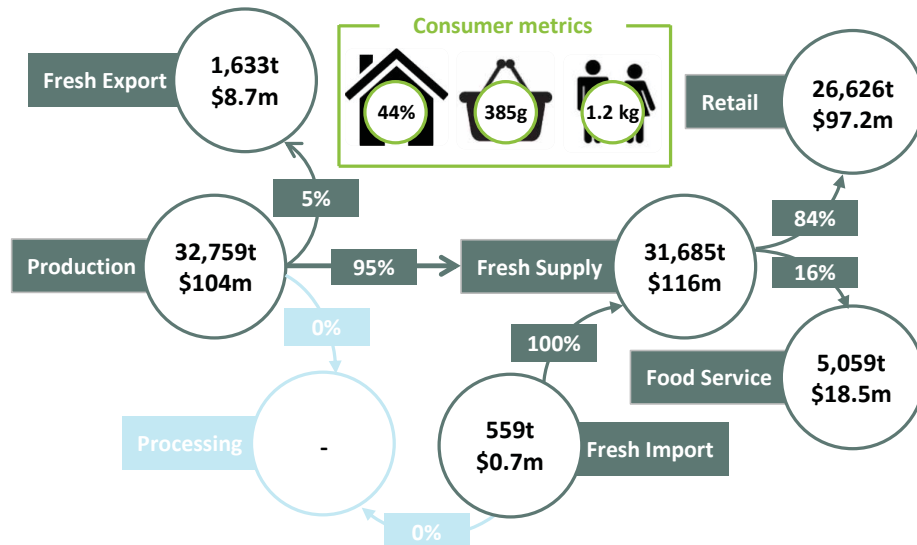
'Beans' refers to green beans, French beans and runner beans. This report does not cover Navy beans and other varieties that are commonly sold tinned. Green bean production occurs predominantly in Queensland. There is minimal processing of local production, due to the low cost of imported product.



For the year ending June 2020:

- **32,759 t** produced and valued at **\$104 m**.
- The wholesale value of the fresh supply was **\$116 m**, with **\$97.2 m** distributed into retail and **\$18.5 m** into food service.
- **44%** of Australian households purchased green beans, buying an average of **385 g** of beans per trip.
- The supply per capita was **1.2 kg**, based on the volume supplied.

Fresh Beans Supply Chain—Year Ending June 2020



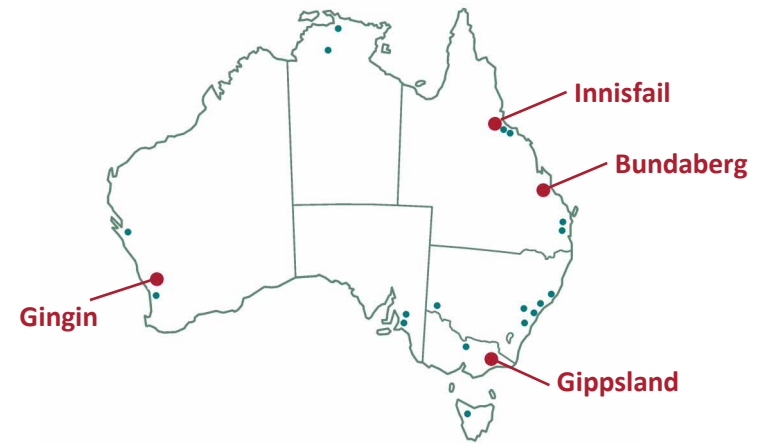
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	33,890	38,012	+12%	32,759	-14%
Production (\$m)	\$ 76.4	\$ 110.7	+45%	\$ 104.0	-6%
Production area (Ha)	7,172	-	-	-	-
Fresh Export Volume (t)	1,639	1,741	+6%	1,633	-6%
Fresh Export Value (\$m)	\$ 6.9	\$ 7.3	+6%	\$ 8.7	+19%
Fresh Import Volume (t)	438	431	-1%	559	+30%
Fresh Import Value (\$m)	\$ 0.5	\$ 0.5	<1%	\$ 0.7	+41%
Fresh Supply (t)	32,688	36,702	+12%	31,685	-14%
Fresh Supply Wholesale Value (\$m)	\$ 84.2	\$ 124.4	+48%	\$ 115.7	-7%
Supply per Capita (kg)	1.31	1.46	+11%	1.23	-16%
Retail Supply (t)	-	30,084	-	26,626	-11%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 102.0	-	\$ 97.2	-5%
Food Service Supply (t)	-	6,618	-	5,059	-24%
Food Service Wholesale Value (\$m)	\$ -	\$ 22.4	-	\$ 18.5	-18%

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

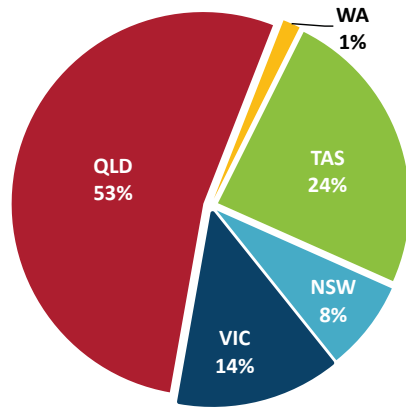
Major Beans Production Areas



Source: AUSVEG



2019/20 Fresh Beans Production by State



Source: ABS

Fresh Beans Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,493												
Victoria	4,429												
Queensland	17,405												
Western Australia	478												
Tasmania	7,954												
Availability legend			High		Medium			Low					None

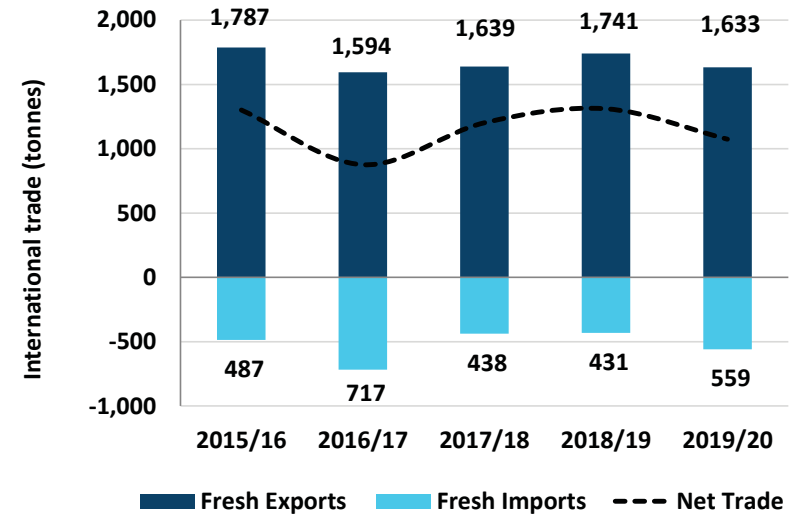
Source: AUSVEG

Fresh Beans International Trade

Australia is a net exporter of fresh beans, typically exporting between **1,500-1,800 tonnes** per year. For the year ending June 2020, Australia exported **1,633 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.



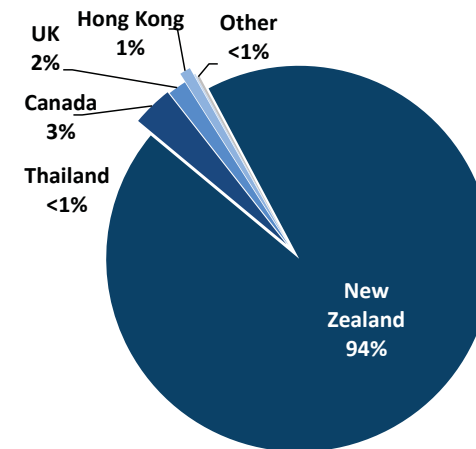
Net Fresh Beans International Trade



Source: GTA

For the year ending June 2020, **94%** of exported fresh beans were sent to New Zealand, as profiled in the chart below.

2019/20 Fresh Beans Exports by Country



Source: GTA



Fresh Beans 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	327	293	385	Queensland	1,611	1,708	1,585
New South Wales	-	48	114	New South Wales	23	23	39
Western Australia	56	74	31	Western Australia	3	-	6
Queensland	54	16	30	Victoria	1	10	3
TOTAL	438	431	559	Tasmania	< 0.5	-	-
				Other	< 0.5	-	-
				TOTAL	1,639	1,741	1,633

Fresh Beans 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
Canada	219	252	360	New Zealand	1,597	1,695	1,532
US	116	53	53	Canada	23	20	55
Indonesia	-	-	42	UK	-	-	25
Belgium	12	36	31	Hong Kong	15	11	15
Tanzania	-	24	24	Thailand	-	1	2
Other	90	66	49	Other	4	14	3
TOTAL	438	431	559	TOTAL	1,639	1,741	1,633

Source: GTA

Processed Beans International Trade

For the year ending June 2020, an additional **6,553 tonnes** of frozen beans were imported, while **25 tonnes** were exported.



Source: GTA





Fresh Beetroot Overview

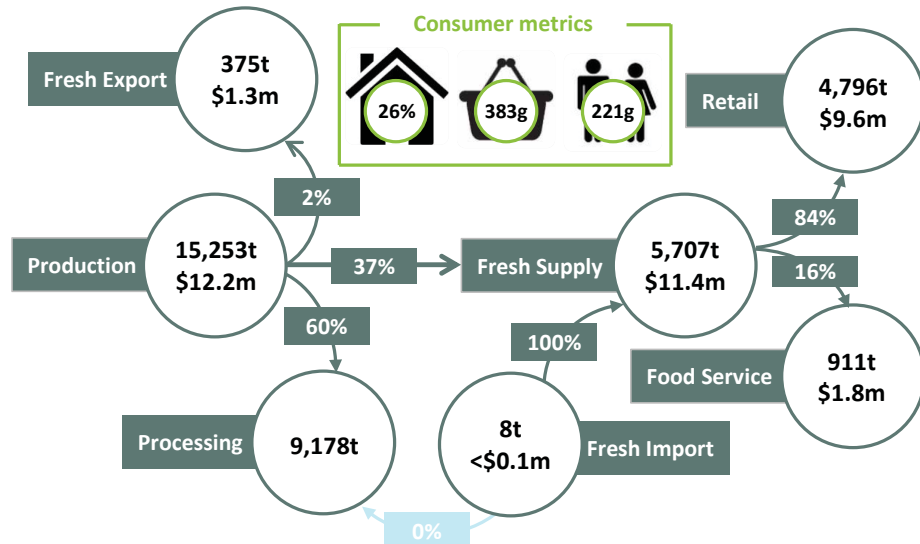
Beetroot production occurs predominantly in Queensland. Volumes grown for processing have decreased in recent years, however the majority of processed volume is tinned.



For the year ending June 2020:

- **15,253 t** produced and valued at **\$12.2 m** with **60%** sent to processing.
- The wholesale value of the fresh supply was **\$11.4 m**, with **\$9.6 m** distributed into retail and **\$1.8 m** into food service.
- **26%** of Australian households purchased fresh beetroot, buying an average of **383 g** of beetroot per shopping trip.
- The supply per capita was **221 g**, based on the volume supplied.

Fresh Beetroot Supply Chain—Year Ending June 2020



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



Year Ending June	2018		2019		2020	
	Value	Value	% YoY	Value	% YoY	
Production (t)	14,353	14,260	>-1%	15,253	+7%	
Production (\$m)	\$ 11.9	\$ 12.6	+6%	\$ 12.2	-4%	
Production area (Ha)	-	-	-	-	-	
Fresh Export Volume (t)	230	351	+52%	375	+7%	
Fresh Export Value (\$m)	\$ 0.7	\$ 1.1	+59%	\$ 1.3	+19%	
Fresh Import Volume (t)	3	8	>100%	8	-5%	
Fresh Import Value (\$m)	< \$0.1	< \$0.1	+89%	< \$0.1	+79%	
Fresh Supply (t)	5,489	5,337	-3%	5,707	+7%	
Fresh Supply Wholesale Value (\$m)	\$ 11.7	\$ 12.1	+3%	\$ 11.4	-5%	
Supply per Capita (kg)	0.22	0.21	-4%	0.22	+4%	
Retail Supply (t)	-	4,375	-	4,796	+10%	
Retail Supply Wholesale Value (\$m)	\$ -	\$ 9.9	-	\$ 9.6	-3%	
Food Service Supply (t)	-	962	-	911	-5%	
Food Service Wholesale Value (\$m)	\$ -	\$ 2.2	-	\$ 1.8	-16%	

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

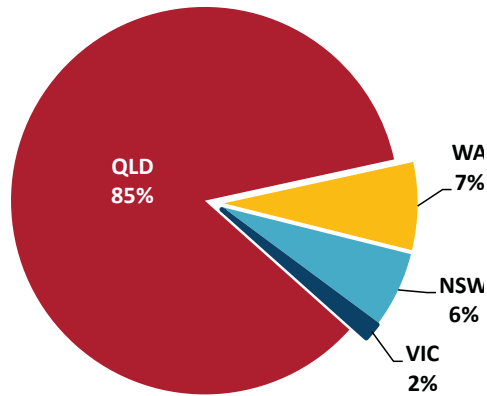
Major Beetroot Production Areas



Source: AUSVEG



2019/20 Fresh Beetroot Production by State



Source: AUSVEG

Fresh Beetroot Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	955	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	220	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	12,963	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	1,114	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

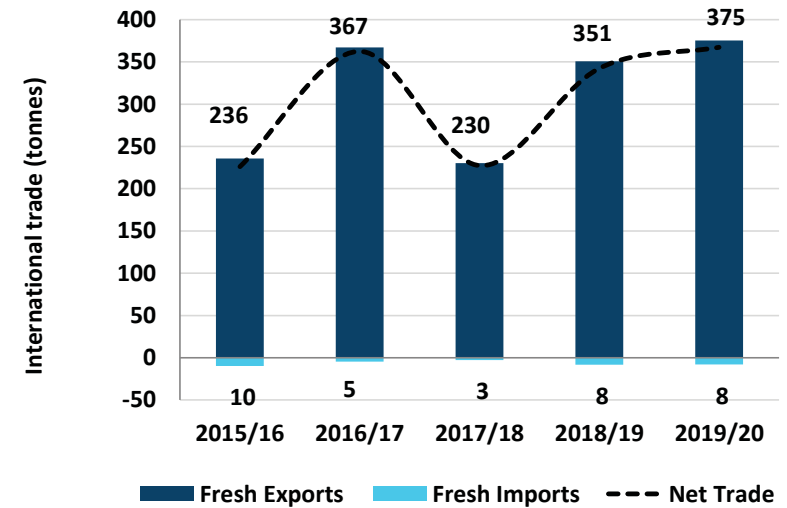
Source: AUSVEG

Fresh Beetroot International Trade

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

For the year ending June 2020, Australia exported **375 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.

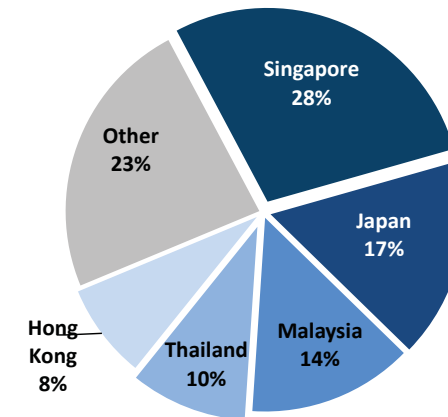
Net Fresh Beetroot/Celeriacs/Radishes International Trade



Source: GTA

For the year ending June 2020, **28%** of exported fresh beetroot was sent to Singapore, as profiled in the chart below.

2019/20 Fresh Beetroot/Celeriacs/Radishes Export by Country



Source: GTA



Fresh Beetroot/Celeriacs/Radishes 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
Western Australia	2	4	4	Victoria	65	81	131
New South Wales	1	4	3	Queensland	93	181	122
Victoria	-	-	1	New South Wales	32	35	52
TOTAL	3	8	8	South Australia	29	45	43
				Western Australia	10	6	22
				Other	1	3	6
				TOTAL	230	351	375

Fresh Beetroot/Celeriacs/Radishes 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	-	4	4	Singapore	49	71	107
India	1	4	3	Japan	40	118	63
Vietnam	-	-	1	Malaysia	43	43	52
Sri Lanka	-	-	1	Thailand	10	12	37
Belgium	2	-	-	Hong Kong	35	41	30
Other	-	-	0	Other	54	65	88
TOTAL	3	8	8	TOTAL	230	351	375

Source: GTA

Processed Beetroot International Trade

Australia imports a significant amount of preserved beetroot, particularly from New Zealand. However, information on exact volumes is not currently available.





Fresh Broccoli/Baby Broccoli Overview

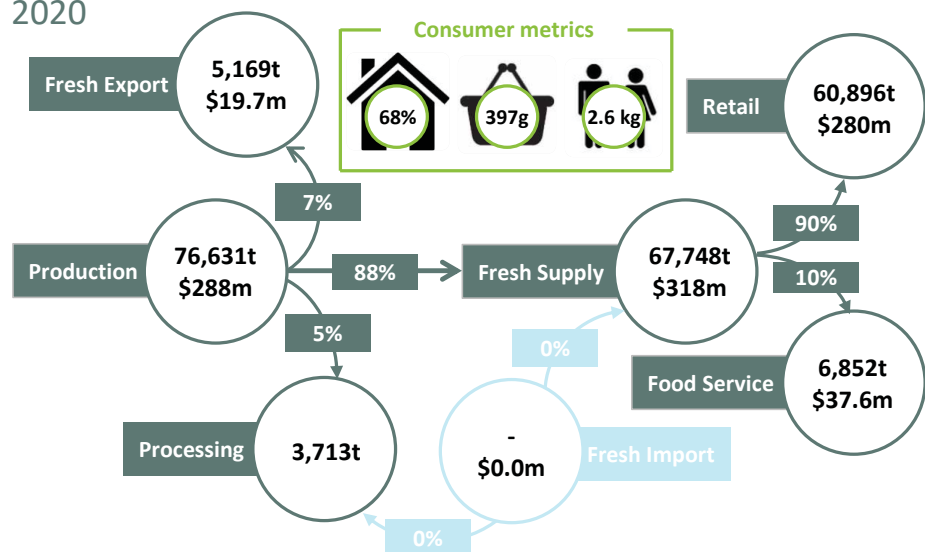
This section combines **broccoli** and **baby broccoli**. Baby broccoli refers to two distinct crops: baby broccoli is one of a number of varieties of modified broccoli; and Broccolini™, a cross between broccoli and the leafy Asian Vegetable 'Gai Lan' (Chinese Broccoli). Broccoli is grown in most states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



For the year ending June 2020:

- **76,631 t** produced and valued at **\$288 m** with **5%** sent to processing.
- The wholesale value of the fresh supply was **\$318 m**, with **\$280 m** distributed into retail and **\$37.6 m** into food service.
- **68%** of Australian households purchased broccoli, buying an average of **397 g** of broccoli per shopping trip.
- The supply per capita was **2.6 kg**, based on the volume supplied.

Fresh Broccoli/Baby Broccoli Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	76,104	75,958	>-1%	76,631	<-1%
Production (\$m)	\$ 229.8	\$ 255.7	+11%	\$ 288.0	+13%
Production area (Ha)	6,755	-	-	-	-
Fresh Export Volume (t)	5,861	6,633	+13%	5,169	-22%
Fresh Export Value (\$m)	\$ 16.0	\$ 19.5	+22%	\$ 19.7	<-1%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	66,471	65,604	-1%	67,748	+3%
Fresh Supply Wholesale Value (\$m)	\$ 253.4	\$ 280.2	+11%	\$ 317.9	+13%
Supply per Capita (kg)	2.67	2.60	-2%	2.63	<-1%
Retail Supply (t)	-	57,770	-	60,896	+5%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 239.8	-	\$ 280.3	+17%
Food Service Supply (t)	-	7,834	-	6,852	-13%
Food Service Wholesale Value (\$m)	\$ -	\$ 40.4	-	\$ 37.6	-7%

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

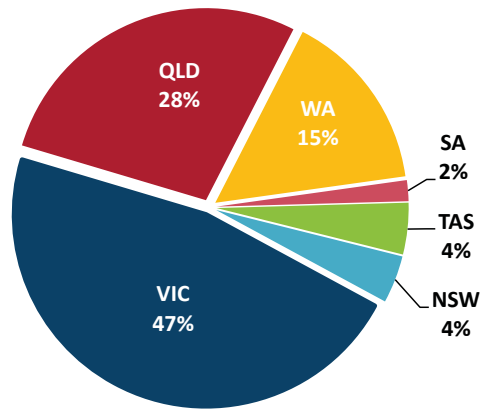
Major Broccoli/Baby Broccoli Production Areas



Sources: AUSVEG



2019/20 Fresh Broccoli Production by State



Source: ABS

Fresh Broccoli Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,073												
Victoria	35,793												
Queensland	21,396												
Western Australia	11,695												
South Australia	1,349												
Tasmania	3,324												
Availability legend			High		Medium		Low						None

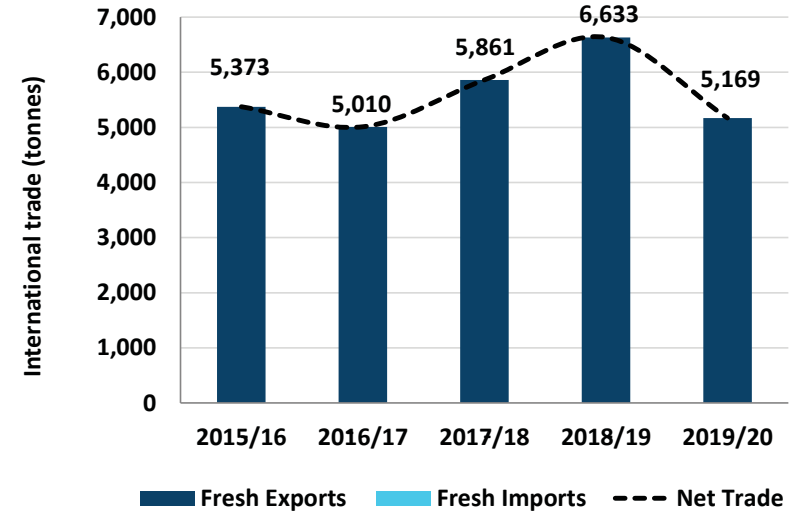
Source: AUSVEG

Fresh Broccoli and Cauliflower International Trade

Note: Trade data combines fresh broccoli and cauliflower.

Australia is a net exporter of broccoli and cauliflower. For the year ending June 2020, Australia exported **5,169 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.

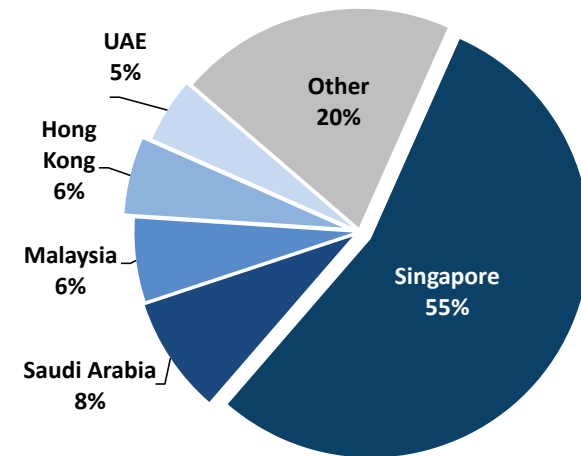
Net Fresh Broccoli and Cauliflower International Trade



Source: GTA

For the year ending June 2020, **55%** of exported fresh broccoli/cauliflower was sent to Singapore, as profiled in the chart below.

2019/20 Fresh Broccoli and Cauliflower Export by Country



Source: GTA



Fresh Broccoli and Cauliflower Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Queensland	3,106	3,669	2,481
Victoria	2,023	2,151	1,918
New South Wales	541	816	942
Western Australia	894	871	485
Tasmania	65	11	40
Other	32	18	9
TOTAL	6,661	7,537	5,874

Fresh Broccoli and Cauliflower Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
Singapore	4,766	4,660	3,212
Saudi Arabia	185	284	503
Malaysia	289	409	359
Hong Kong	222	342	329
UAE	166	147	275
Other	1,032	1,695	1,196
TOTAL	6,661	7,537	5,874

Source: GTA

Processed Broccoli/Baby Broccoli International Trade

Australia imports some volume of frozen broccoli. However, information on exact volumes is not available due to the way trade data is recorded.





Brussels Sprouts Overview

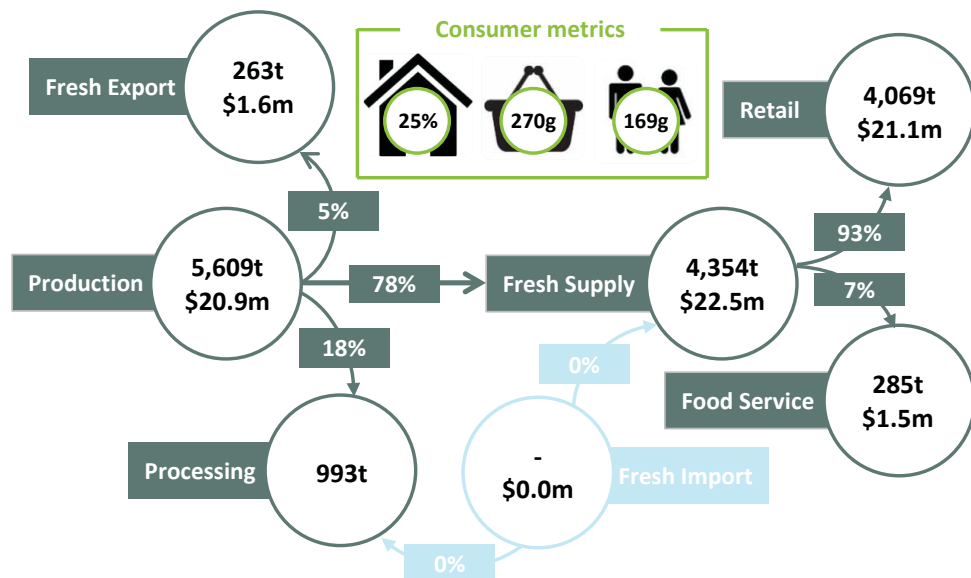
Brussels sprouts production occurs in the southern states of Australia, with the majority of production occurring in South Australia.

For the year ending June 2020:

- **5,609 t** was produced and valued at **\$20.9 m** with **18%** sent to processing.
- The wholesale value of the fresh supply was **\$22.5 m**, with **\$21.1 m** distributed to retail and **\$1.5 m** into food service.
- **25%** of Australian households purchased Brussels sprouts, buying an average of **270g** of Brussels sprouts per shopping trip.
- The supply per capita was **169 g**, based on the volume supplied.



Fresh Brussels Sprouts Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,210	5,732	-8%	5,609	-2%
Production (\$m)	\$ 18.3	\$ 19.0	+4%	\$ 20.9	+10%
Production area (Ha)	365	-	-	-	-
Fresh Export Volume (t)	266	365	+37%	263	-28%
Fresh Export Value (\$m)	\$ 1.2	\$ 2.1	+69%	\$ 1.6	-23%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	4,845	4,352	-10%	4,354	<1%
Fresh Supply Wholesale Value (\$m)	\$ 19.9	\$ 19.8	>-1%	\$ 22.5	+14%
Supply per Capita (kg)	0.19	0.17	-11%	0.17	-2%
Retail Supply (t)	-	4,011	-	4,069	+1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 18.3	-	\$ 21.1	+15%
Food Service Supply (t)	-	341	-	285	-16%
Food Service Wholesale Value (\$m)	\$ -	\$ 1.6	-	\$ 1.5	-5%

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

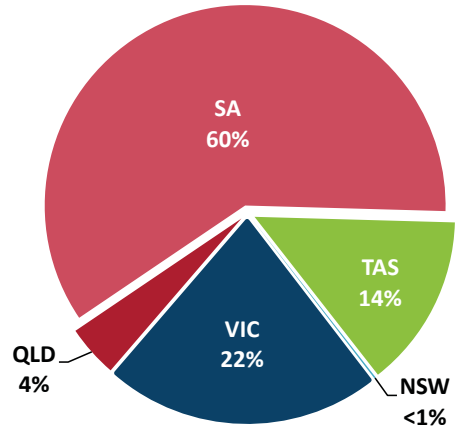
Major Brussels Sprouts Production Areas



Source: AUSVEG



2019/20 Fresh Brussels Sprouts Production by State



Source: ABS

Fresh Brussels Sprouts Seasonality by State

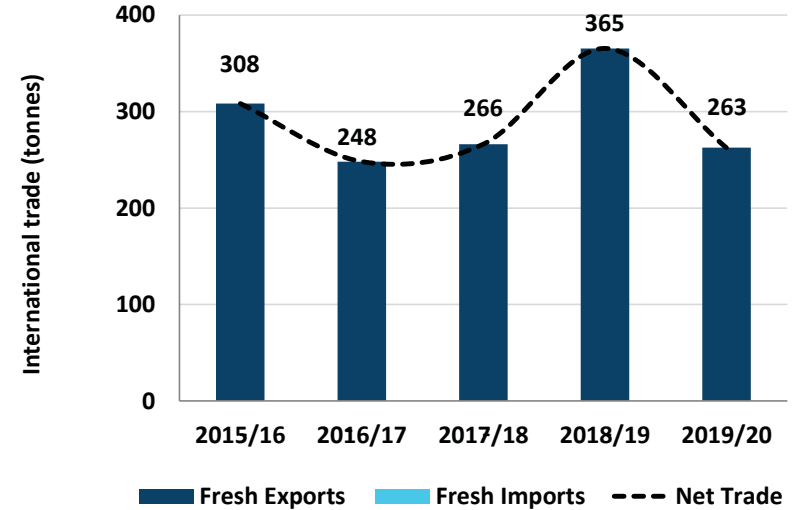
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	7												
Victoria	1,220												
Queensland	237												
Western Australia	0												
South Australia	3,360												
Tasmania	785												
Availability legend			High		Medium		Low						None

Source: AUSVEG

Fresh Brussels Sprouts International Trade

Australia is a net exporter of Brussels Sprouts. For the year ending June 2020, Australia exported **263 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.

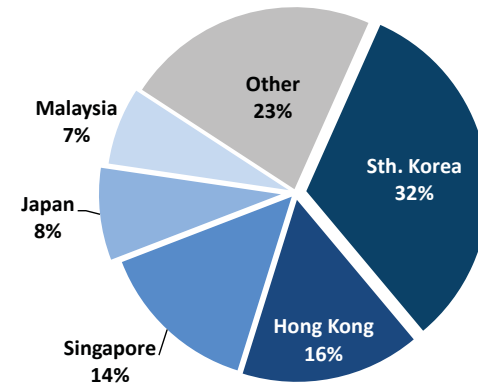
Net Fresh Brussels Sprouts International Trade



Source: GTA

For the year ending June 2020, **33%** of exported fresh Brussels Sprouts was sent to South Korea, as profiled in the chart below.

2019/20 Fresh Brussels Sprouts Exports by Country



Source: GTA



Fresh Brussels Sprouts Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Victoria	139	140	106
South Australia	82	121	61
Western Australia	26	61	38
New South Wales	9	29	32
Queensland	10	15	20
Other	1	-	6
TOTAL	266	365	263

Fresh Brussels Sprouts Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
Sth. Korea	96	123	85
Hong Kong	26	52	42
Singapore	38	43	38
Japan	69	71	21
Malaysia	15	13	18
Other	23	64	59
TOTAL	266	365	263

Source: GTA

Processed Brussels Sprouts International Trade

Australia imports some volume of frozen Brussels Sprouts. However, information on exact volumes is not available due to the way trade data is recorded.





Fresh Cabbages Overview

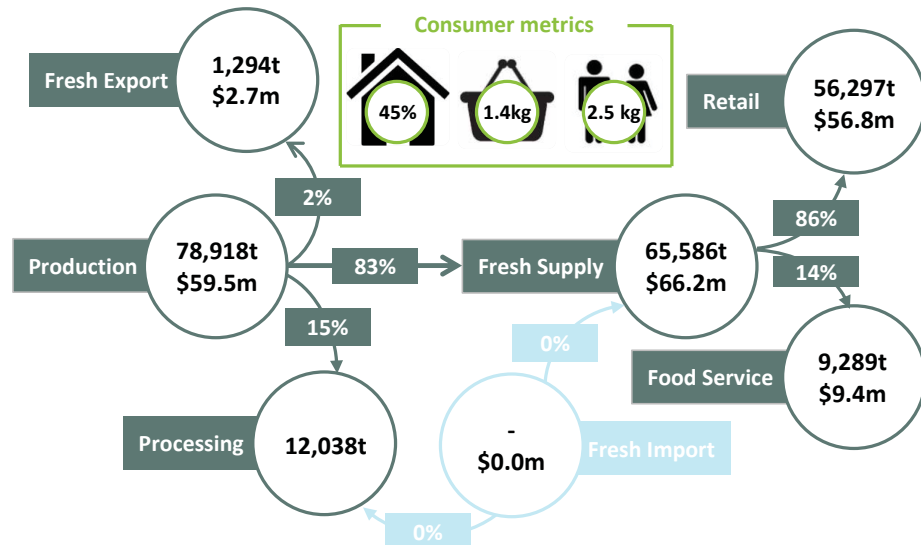
Cabbage production occurs in most states of Australia, with production occurring during the winter months.

For the year ending June 2020:

- **78,918 t** produced and valued at **\$59.5 m** with **15%** sent to processing.
- The wholesale value of the fresh supply was **\$66.2 m**, with **\$56.8 m** distributed into retail and **\$9.4 m** into food service.
- **45%** of Australian households purchased cabbages, buying an average of **1.2 kg** of cabbages per shopping trip.
- The supply per capita was **2.5 kg**, based on the volume supplied.



Fresh Cabbages Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	75,165	77,421	+3%	78,918	+2%
Production (\$m)	\$ 41.6	\$ 44.1	+6%	\$ 59.5	+35%
Production area (Ha)	2,793	-	-	-	-
Fresh Export Volume (t)	1,706	1,739	+2%	1,294	-26%
Fresh Export Value (\$m)	\$ 3.2	\$ 3.1	-3%	\$ 2.7	-12%
Fresh Import Volume (t)	8	1	-87%	-	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	-66%	\$ -	-100%
Fresh Supply (t)	62,001	63,873	+3%	65,586	+3%
Fresh Supply Wholesale Value (\$m)	\$ 45.0	\$ 47.9	+7%	\$ 66.2	+38%
Supply per Capita (kg)	2.49	2.53	+2%	2.54	<1%
Retail Supply (t)	-	53,228	-	56,297	+6%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 40.0	-	\$ 56.8	+42%
Food Service Supply (t)	-	10,646	-	9,289	-13%
Food Service Wholesale Value (\$m)	\$ -	\$ 8.0	-	\$ 9.4	+17%

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

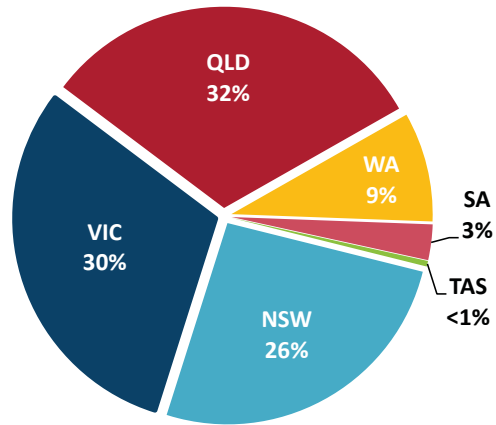
Major Cabbage Production Areas



Source: AUSVEG



2019/20 Fresh Cabbages Production by State



Sources: ABS

Fresh Cabbages Seasonality by State

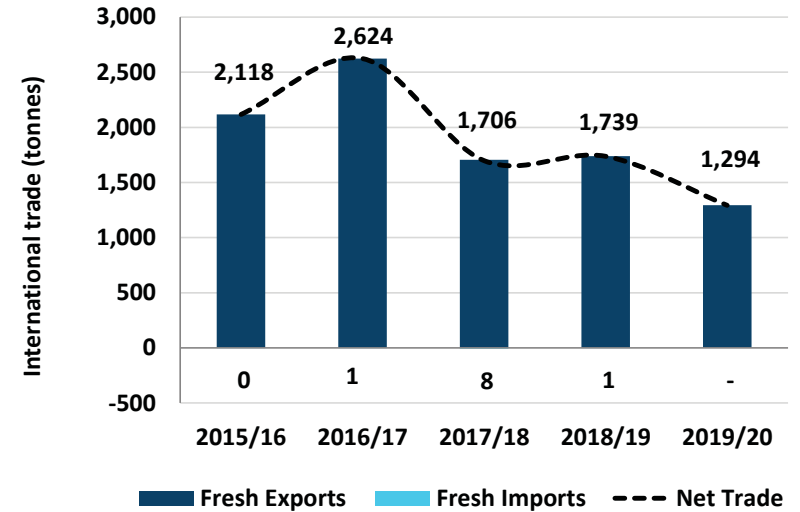
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	20,517	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	23,969	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	24,871	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	6,948	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	2,257	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	354	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low	None								

Sources: AUSVEG

Fresh Cabbages International Trade

Australia is a net exporter of cabbages. For the year ending June 2020, Australia exported **1,294 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.

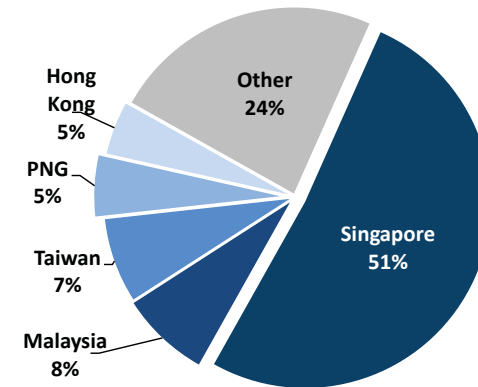
Net Fresh Cabbages International Trade



Source: GTA

For the year ending June 2020, **51%** of exported fresh cabbages was sent to Singapore, as profiled in the chart below.

2019/20 Fresh Cabbages Exports by Country



Source: GTA



Fresh Cabbages 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	7	1	-	Western Australia	312	928	777
New South Wales	2	-	-	Queensland	1,112	555	324
Other	-	-	-	Victoria	181	168	143
TOTAL	8	1	-	New South Wales	84	30	43
				South Australia	7	13	5
				Other	10	45	2
				TOTAL	1,707	1,739	1,294

Fresh Cabbages 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	6	1	-	Singapore	466	889	666
Fiji	2	-	-	Malaysia	58	101	100
Sth. Korea	<0.5	-	-	Taiwan	120	1	95
Other	<0.5	-	-	PNG	100	95	68
TOTAL	8	1	-	Hong Kong	34	93	60
				Other	928	560	305
				TOTAL	1,707	1,739	1,294

Source: GTA

Processed Cabbages International Trade

Australia imports some volume of frozen and preserved cabbages. However, information on exact volumes is not available due to the way trade data is recorded.





Fresh Capsicums Overview

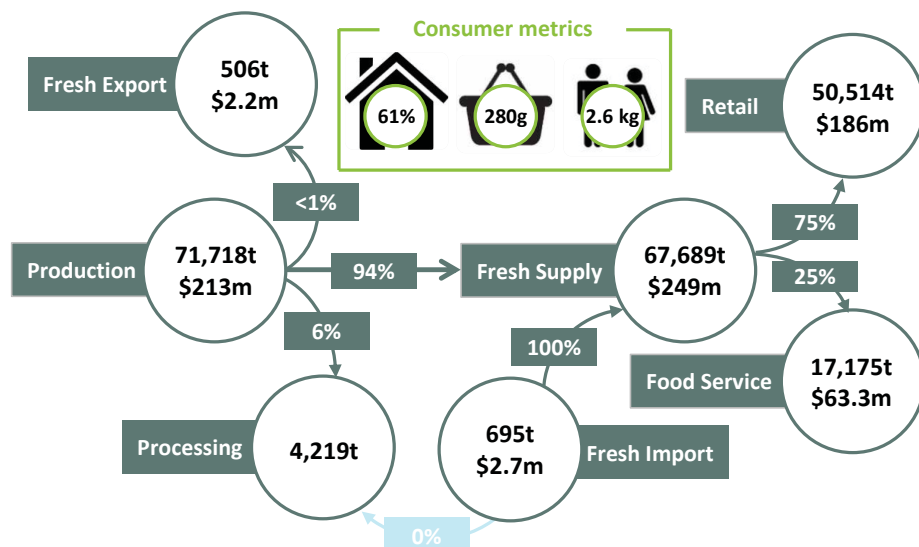
Capsicums, or bell peppers, are grown in most states of Australia. The majority of capsicums are currently grown outdoors in Queensland. However, increasingly capsicums are being grown year-round in high-tech greenhouses in the southern states.



For the year ending June 2020:

- **71,718 t** produced and valued at **\$212 m** with **6%** sent to processing.
- The wholesale value of the fresh supply was **\$249 m**, with **\$186 m** distributed into retail and **\$63.3 m** into food service.
- **61%** of Australian households purchased capsicums, buying an average of **280 g** of capsicums per shopping trip.
- The supply per capita was **2.6 kg**, based on the volume supplied.

Fresh Capsicums Supply Chain—Year Ending June 2020



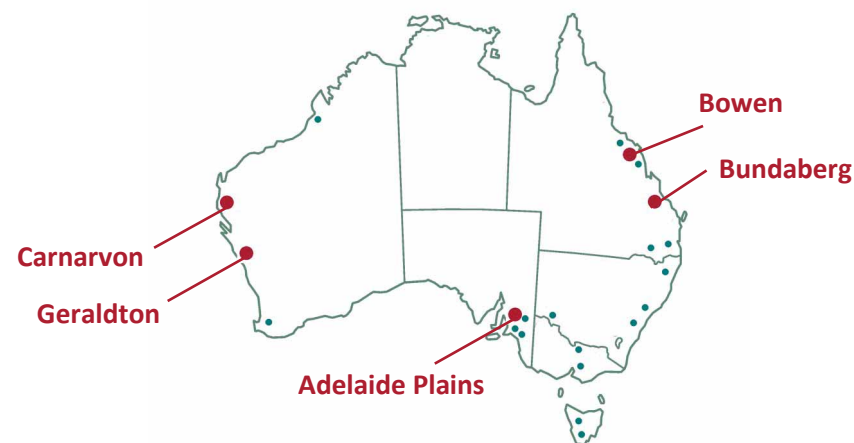
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	76,237	77,030	+1%	71,718	-7%
Production (\$m)	\$ 155.6	\$ 171.1	+10%	\$ 212.9	+24%
Production area (Ha)	2,071	-	-	-	-
Fresh Export Volume (t)	317	352	+11%	506	+44%
Fresh Export Value (\$m)	\$ 1.2	\$ 1.3	+6%	\$ 2.2	+74%
Fresh Import Volume (t)	1,182	672	-43%	695	+3%
Fresh Import Value (\$m)	\$ 4.4	\$ 2.7	-39%	\$ 2.7	>-1%
Fresh Supply (t)	72,617	72,819	<1%	67,689	-7%
Fresh Supply Wholesale Value (\$m)	\$ 183.9	\$ 200.7	+9%	\$ 249.5	+24%
Supply per Capita (kg)	2.91	2.89	>-1%	2.62	-9%
Retail Supply (t)	-	49,556	-	50,514	+2%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 136.6	-	\$ 186.2	+36%
Food Service Supply (t)	-	23,263	-	17,175	-26%
Food Service Wholesale Value (\$m)	\$ -	\$ 64.1	-	\$ 63.3	-1%

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

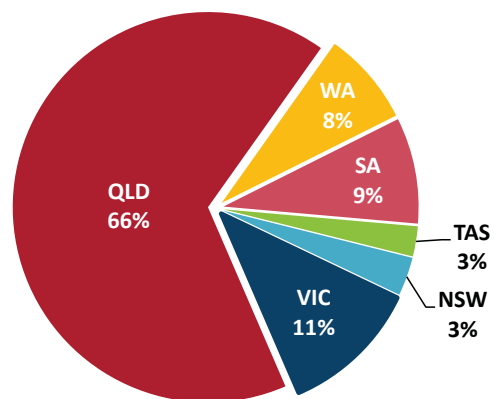
Major Capsicum Production Areas



Sources: ABS; AUSVEG



2019/20 Fresh Capsicums Production by State



Source: ABS

Fresh Capsicums Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,293												
Victoria	8,187												
Queensland	47,567												
Western Australia	5,581												
South Australia	6,300												
Tasmania	1,790												
Availability legend		High	Medium	Low	None								

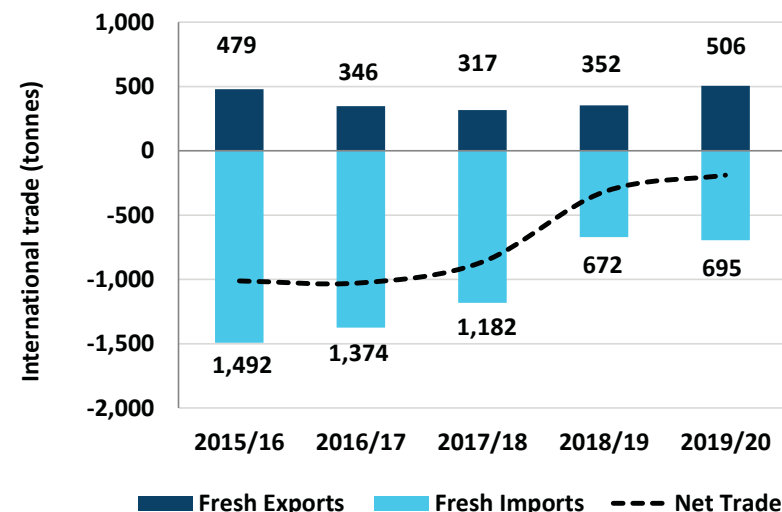
Source: AUSVEG

Fresh Capsicums and Chillies International Trade

Note: Trade data combines fresh capsicums and chillies.

Australia is a net importer of capsicums and chillies, typically importing between **600-1,500 tonnes** every year, predominantly from New Zealand. For the year ending June 2020, Australia exported **506 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.

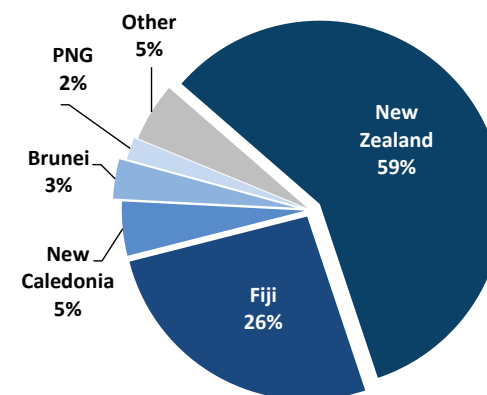
Net Fresh Capsicums and Chillies International Trade



Source: GTA

For the year ending June 2020, **59%** of exported fresh capsicums/chillies were sent to New Zealand, as profiled in the chart below.

2019/20 Fresh Capsicums and Chillies Exports by Country



Source: GTA





Fresh Capsicums and Chillies 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	562	436	496	Queensland	294	270	401
Western Australia	162	81	84	Victoria	13	61	94
Victoria	389	98	80	South Australia	1	10	9
Queensland	76	62	40	New South Wales	10	6	5
South Australia	5	3	2	Western Australia	1	-	1
Other	-	0	-	Other	1	8	-
TOTAL	1,194	679	703	TOTAL	321	356	511

Fresh Capsicums and Chillies 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	922	588	614	New Zealand	148	171	299
India	82	58	51	Fiji	41	63	134
Vietnam	98	22	37	New Caledonia	29	27	24
China	90	11	-	Brunei	15	15	18
Mexico	2	-	-	PNG	48	23	10
Other	1	-	0	Other	40	57	26
TOTAL	1,194	679	703	TOTAL	321	356	511

Source: GTA

Processed Capsicums International Trade

Australia imports some volume of dried and preserved capsicums. However, specific information on exact volumes is not available due to the way trade data is recorded.





Fresh Carrots Overview

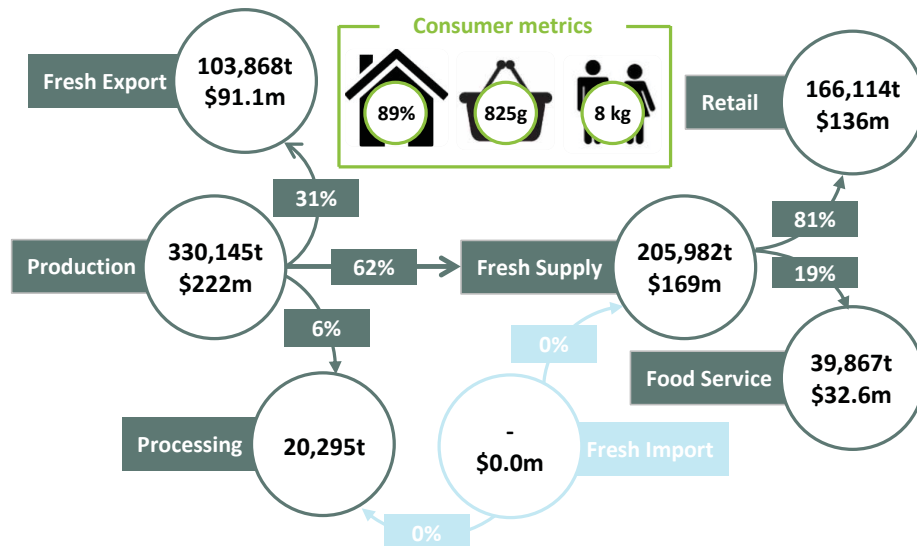
Carrot production occurs primarily in the southern states of Australia, with a large volume of carrots grown for the export market in Western Australia.



For the year ending June 2020:

- **330,145 t** produced and valued at **\$222 m** with **6%** sent to processing.
- The wholesale value of the fresh supply was **\$169 m**, with **\$136 m** distributed into retail and **\$32.6 m** into food service.
- **89%** of Australian households purchased carrots, buying an average of **825 g** of carrots per shopping trip.
- The supply per capita was **8 kg**, based on the volume supplied.

Fresh Carrots Supply Chain—Year Ending June 2020



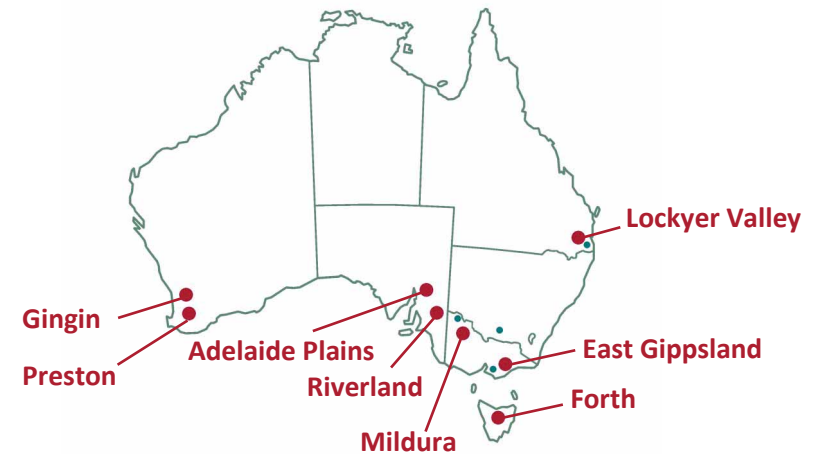
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	330,652	332,598	<-1%	330,145	>-1%
Production (\$m)	\$ 215.7	\$ 219.3	+2%	\$ 222.1	+1%
Production area (Ha)	5,628	-	-	-	-
Fresh Export Volume (t)	108,172	110,213	+2%	103,868	-6%
Fresh Export Value (\$m)	\$ 94.6	\$ 96.6	+2%	\$ 91.1	-6%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	202,153	201,939	>-1%	205,982	+2%
Fresh Supply Wholesale Value (\$m)	\$ 157.8	\$ 160.0	+1%	\$ 168.7	+5%
Supply per Capita (kg)	8.11	8.01	-1%	7.98	>-1%
Retail Supply (t)	-	159,007	-	166,114	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 126.0	-	\$ 136.0	+8%
Food Service Supply (t)	-	42,932	-	39,867	-7%
Food Service Wholesale Value (\$m)	\$ -	\$ 34.0	-	\$ 32.6	-4%

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

Major Carrot Production Areas

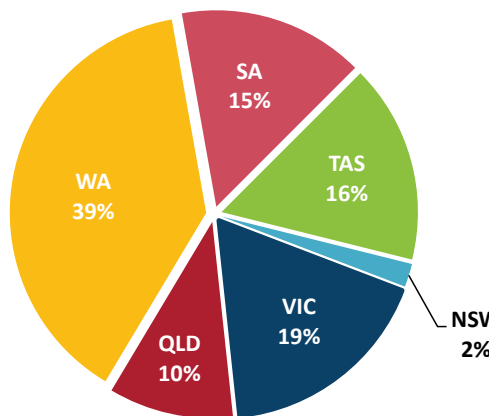


Source: AUSVEG



Carrots

2017/18 Fresh Carrot Production by State



Source: AUSVEG

Fresh Carrots Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	6,324	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	57,801	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	33,885	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	127,483	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	50,543	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	54,108	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

Source: AUSVEG

Fresh Carrots and Turnips International Trade

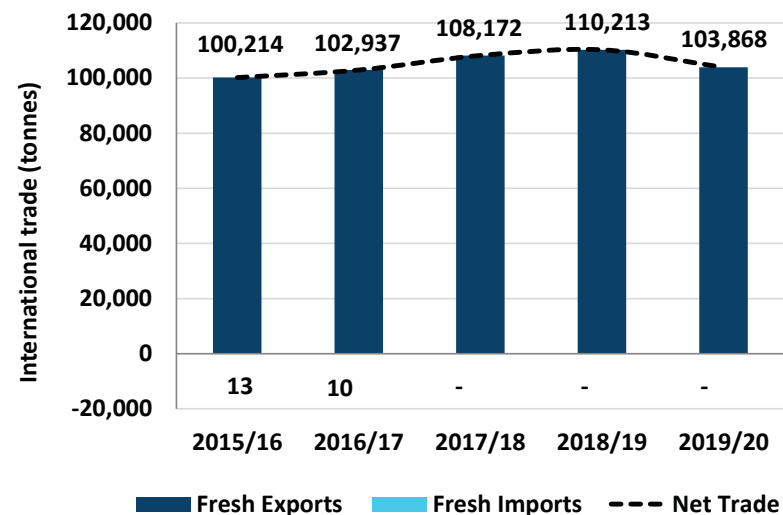
Note: Trade data combines fresh carrots and turnips.

Australia is a net exporter of carrots and turnips, typically exporting between **100,000-110,000 tonnes** every year, predominantly from Western Australia. For the year ending June 2020, Australia exported **103,868 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.

Carrots



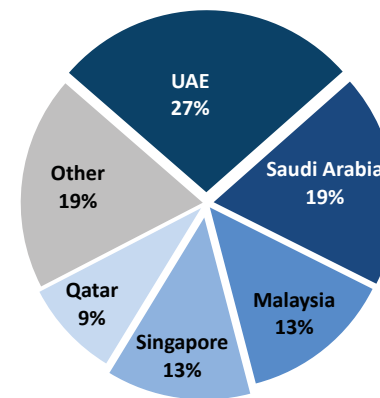
Net Fresh Carrots and Turnips International Trade



Source: GTA

For the year ending June 2020, **27%** of exported fresh carrots/turnips were sent to the United Arab Emirates (UAE), as profiled in the chart below.

2019/20 Fresh Carrots and Turnips Exports by Country



Source: GTA



Fresh Carrots and Turnips Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Western Australia	96,111	98,508	94,082
Tasmania	8,590	6,709	5,109
Queensland	1,686	2,632	2,502
Victoria	1,019	1,794	1,320
South Australia	581	388	696
Other	187	182	158
TOTAL	108,175	110,213	103,868

Fresh Carrots and Turnips Imports and Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
UAE	33,466	30,284	28,131
Saudi Arabia	15,087	21,027	19,653
Malaysia	14,150	14,450	14,063
Singapore	13,051	13,061	13,285
Qatar	9,626	10,460	9,004
Other	22,794	20,931	19,731
TOTAL	108,175	110,213	103,868

Source: GTA





Fresh Cauliflowers Overview

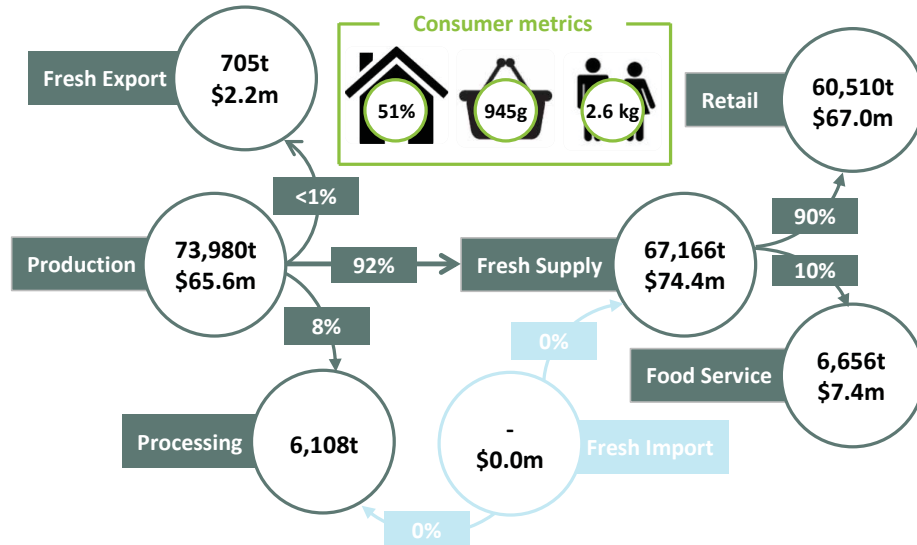
Cauliflower production occurs across most states in Australia, with production occurring during the winter months.

For the year ending June 2020:

- **73,980 t** produced and valued at **\$65.8 m** with **8%** sent to processing.
- The wholesale value of the fresh supply was **\$74.4 m**, with **\$67 m** distributed into retail and **\$7.4 m** into food service.
- **51%** of Australian households purchased cauliflowers, buying an average of **945 g** of cauliflowers per shopping trip.
- The supply per capita was **2.6 kg**, based on the volume supplied.



Fresh Cauliflowers Supply Chain—Year Ending June 2020



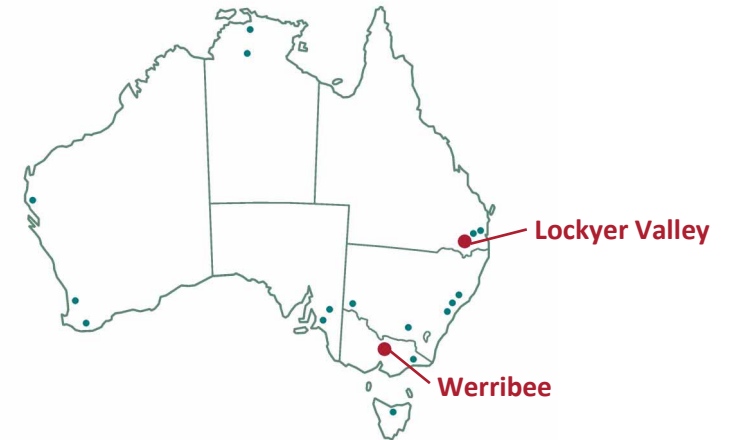
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	74,146	75,647	+2%	73,980	-2%
Production (\$m)	\$ 47.4	\$ 54.1	+14%	\$ 65.6	+21%
Production area (Ha)	3,309	-	-	-	-
Fresh Export Volume (t)	799	904	+13%	705	-22%
Fresh Export Value (\$m)	\$ 1.8	\$ 2.2	+22%	\$ 2.2	<1%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	67,224	68,497	+2%	67,166	-2%
Fresh Supply Wholesale Value (\$m)	\$ 53.5	\$ 61.0	+14%	\$ 74.4	+22%
Supply per Capita (kg)	2.70	2.72	<1%	2.60	-4%
Retail Supply (t)	-	59,927	-	60,510	<1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 53.4	-	\$ 67.0	+26%
Food Service Supply (t)	-	8,570	-	6,656	-22%
Food Service Wholesale Value (\$m)	\$ -	\$ 7.6	-	\$ 7.4	-3%

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

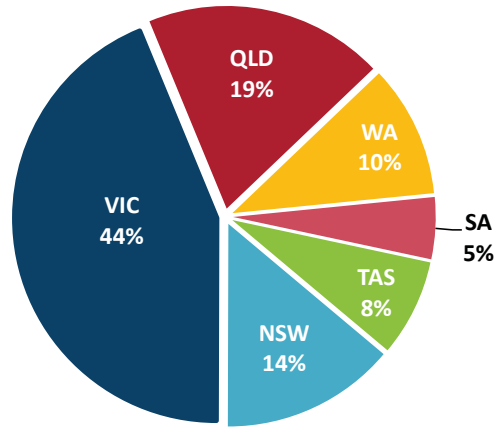
Major Cauliflower Production Areas



Source: AUSVEG



2019/20 Fresh Cauliflowers Production by State



Source: ABS

Fresh Cauliflowers Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	10,307												
Victoria	32,351												
Queensland	14,130												
Western Australia	7,804												
South Australia	3,648												
Tasmania	5,739												
Availability legend			High		Medium		Low						None

Source: ABS

Fresh Cauliflowers International Trade

Note: Trade data combines fresh broccoli and cauliflower. For this combined analysis see pages 267-268.



Processed Cauliflowers International Trade

Australia imports some volume of frozen cauliflowers. However, specific information on exact volumes is not available due to the way trade data is recorded.





Fresh Celery Overview

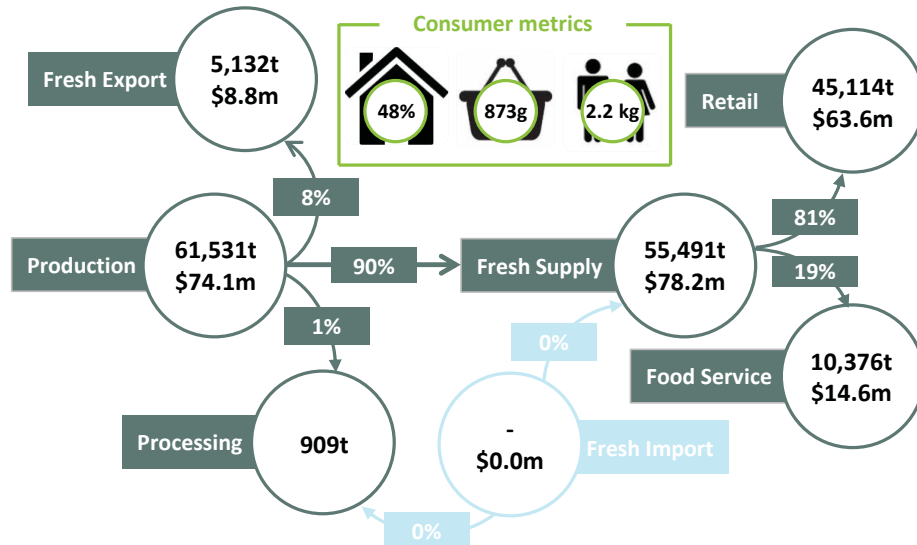
Celery is grown in most states of Australia, with the majority of production occurring in Victoria. Most of the celery grown in Australia is destined for the fresh local market, with a small but growing fresh export market.



For the year ending June 2020:

- **61,531 t** produced and valued at **\$74.1 m** with **1%** sent to processing.
- The wholesale value of the fresh supply was **\$78.2 m**, with **\$63.6 m** distributed into retail and **\$14.6 m** into food service.
- **48%** of Australian households purchased celery, buying an average of **873 g** of celery per shopping trip.
- The supply per capita was **2.2 kg**, based on the volume supplied.

Fresh Celery Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	65,240	61,245	-6%	61,531	<1%
Production (\$m)	\$ 60.2	\$ 74.9	+24%	\$ 74.1	-1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	4,504	5,310	+18%	5,132	-3%
Fresh Export Value (\$m)	\$ 7.1	\$ 9.1	+28%	\$ 8.8	-3%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	59,772	55,031	-8%	55,491	<1%
Fresh Supply Wholesale Value (\$m)	\$ 63.6	\$ 78.9	+24%	\$ 78.2	>-1%
Supply per Capita (kg)	2.40	2.18	-9%	2.15	-1%
Retail Supply (t)	-	43,908	-	45,114	+3%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 63.0	-	\$ 63.6	<1%
Food Service Supply (t)	-	11,122	-	10,376	-7%
Food Service Wholesale Value (\$m)	\$ -	\$ 16.0	-	\$ 14.6	-8%

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

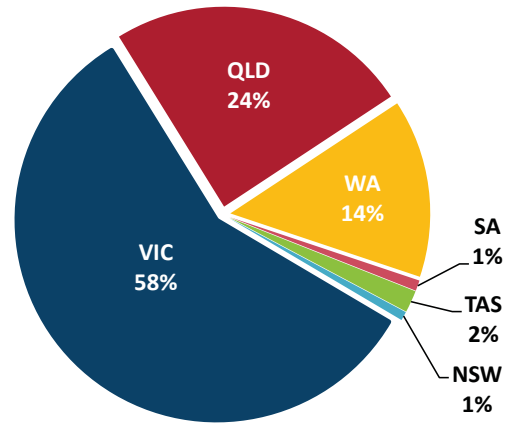
Major Celery Production Areas



Source: AUSVEG



2019/20 Fresh Celery Production by State



Source: AUSVEG

Fresh Celery Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	440												
Victoria	35,498												
Queensland	15,095												
Western Australia	8,873												
South Australia	528												
Tasmania	1,097												
Availability legend			High		Medium		Low						None

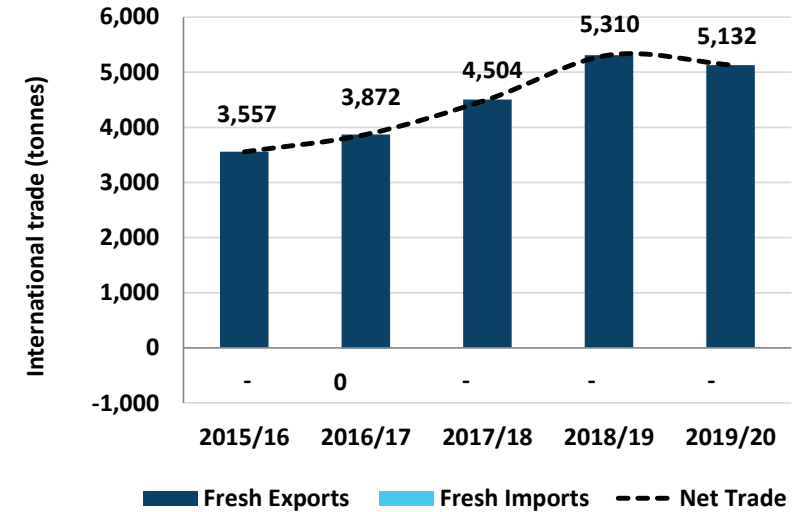
Source: AUSVEG

Fresh Celery International Trade

Australia is a net exporter of celery, with exports growing in recent years. For the year ending June 2020, Australia exported **5,132 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.



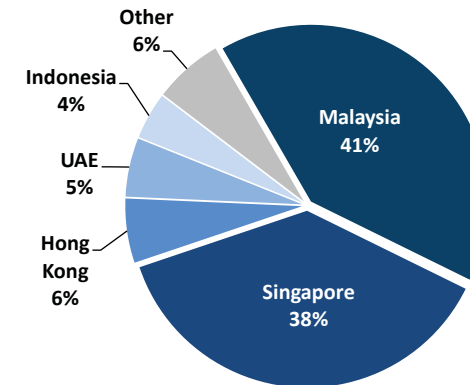
Net Fresh Celery International Trade



Source: GTA

2019/20 Fresh Celery Exports by Country

For the year ending June 2020, **41%** of exported fresh celery was sent to Malaysia, as profiled in the chart below.



Source: GTA



Fresh Celery Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Western Australia	2,777	2,678	3,095
Victoria	1,488	2,376	1,841
Queensland	144	132	108
New South Wales	83	105	87
South Australia	12	18	1
Other	-	1	< 0.5
TOTAL	4,504	5,310	5,132

Fresh Celery Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
Malaysia	1,799	2,065	2,084
Singapore	1,908	1,685	1,927
Hong Kong	148	668	301
UAE	415	256	276
Indonesia	54	135	219
Other	180	501	325
TOTAL	4,504	5,310	5,132

Source: GTA





Fresh Chillies Overview

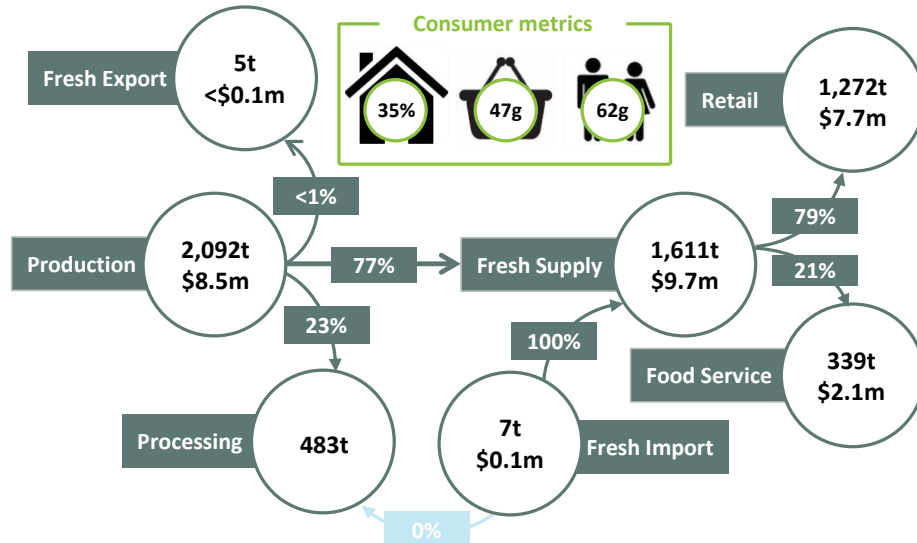
Chillies are grown in most states of Australia. The majority of chillies are currently grown in Queensland.



For the year ending June 2020:

- **2,092 t** produced and valued at **\$8.5 m** with **23%** sent to processing.
- The wholesale value of the fresh supply was **\$9.7 m**, with **\$7.7 m** distributed into retail and **\$2.1 m** into food service.
- **35%** of Australian households purchased chillies, buying an average of **47 g** of chillies per shopping trip.
- The supply per capita was **62 g**, based on the volume supplied.

Fresh Chillies Supply Chain—Year Ending June 2020



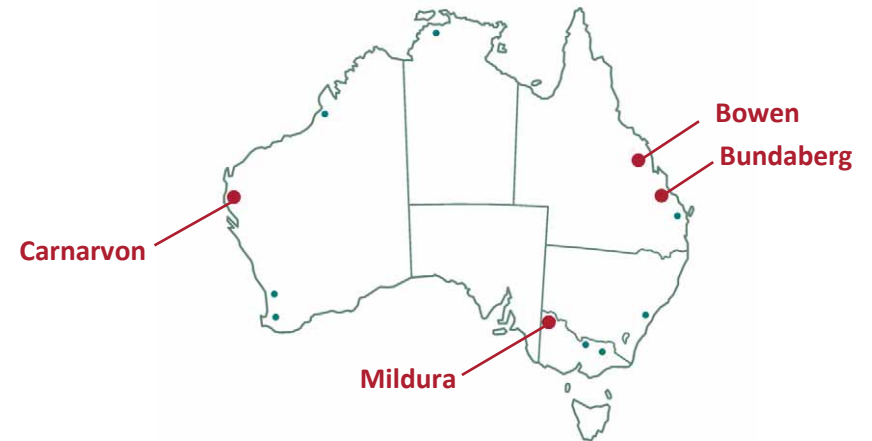
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,246	2,255	<1%	2,092	-7%
Production (\$m)	\$ 9.1	\$ 8.9	-2%	\$ 8.5	-4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3	4	+11%	5	+44%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	+6%	< \$0.1	+74%
Fresh Import Volume (t)	12	7	-43%	7	+3%
Fresh Import Value (\$m)	\$ 0.2	\$ 0.1	-39%	\$ 0.1	>-1%
Fresh Supply (t)	1,737	1,738	<1%	1,611	-7%
Fresh Supply Wholesale Value (\$m)	\$ 10.4	\$ 10.2	-2%	\$ 9.7	-5%
Supply per Capita (kg)	0.07	0.07	-1%	0.06	-9%
Retail Supply (t)	-	1,372	-	1,272	-7%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 8.1	-	\$ 7.7	-5%
Food Service Supply (t)	-	366	-	339	-7%
Food Service Wholesale Value (\$m)	\$ -	\$ 2.1	-	\$ 2.1	-5%

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

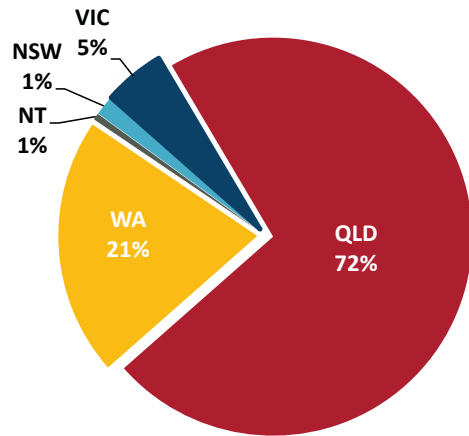
Major Chilli Production Areas



Source: AUSVEG



2019/20 Fresh Chillies Production by State



Source: AUSVEG

Fresh Chillies Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	31												
Victoria	104												
Queensland	1,506												
Western Australia	439												
Northern Territory	11												
Availability legend			High		Medium		Low					None	

Source: AUSVEG

Fresh Chillies International Trade

Note: Trade data combines fresh capsicums and chillies. For this combined analysis see pages 285-287.

Processed Chillies International Trade

For the year ending June 2020, an additional **4,871 tonnes** of dried chillies were imported, while **224 tonnes** were exported.



Source: GTA





Fresh Cucumbers Overview

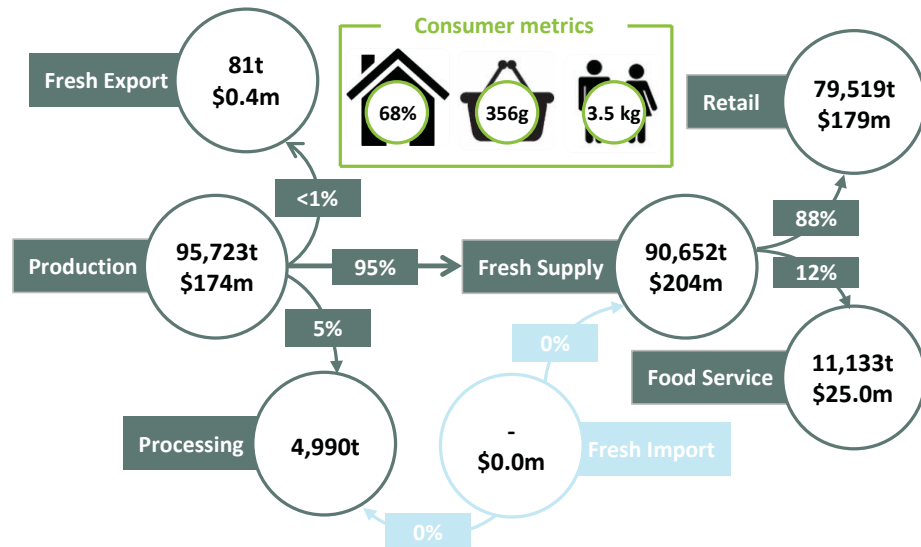
The majority of cucumber production currently occurs in protected cropping, either covered or increasingly in high-tech glasshouses, across Australia, with major volumes grown in South Australia and Queensland.



For the year ending June 2020:

- **95,723 t** produced and valued at **\$174 m** with **5%** sent to processing.
- The wholesale value of the fresh supply was **\$204 m**, with **\$179 m** distributed into retail and **\$25 m** into food service.
- **68%** of Australian households purchased cucumbers, buying an average of **356 g** of cucumbers per shopping trip.
- The supply per capita was **3.5 kg**, based on the volume supplied.

Fresh Cucumbers Supply Chain—Year Ending June 2020



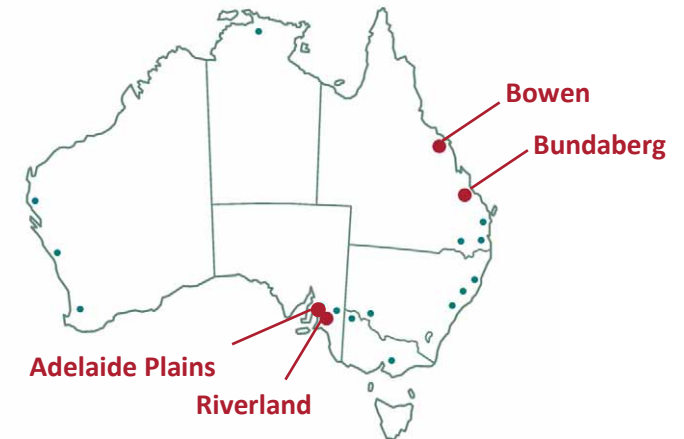
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	91,084	93,769	+3%	95,723	+2%
Production (\$m)	\$ 157.3	\$ 180.3	+15%	\$ 174.1	-3%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	134	93	-30%	81	-13%
Fresh Export Value (\$m)	\$ 0.4	\$ 0.3	-15%	\$ 0.4	+9%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	86,202	88,787	+3%	90,652	+2%
Fresh Supply Wholesale Value (\$m)	\$ 184.0	\$ 211.0	+15%	\$ 203.8	-3%
Supply per Capita (kg)	3.46	3.52	+2%	3.51	>-1%
Retail Supply (t)	-	76,579	-	79,519	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 182.0	-	\$ 178.8	-2%
Food Service Supply (t)	-	12,208	-	11,133	-9%
Food Service Wholesale Value (\$m)	\$ -	\$ 29.0	-	\$ 25.0	-14%

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

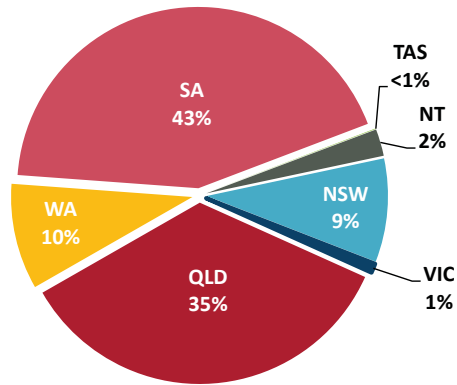
Major Cucumber Production Areas



Source: AUSVEG



2019/20 Fresh Cucumbers Production by State



Source: AUSVEG

Fresh Cucumbers Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,835	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	796	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	33,503	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	9,032	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	41,212	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	47	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	2,297	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Low	None							

Source: AUSVEG

Main Cucumber Varieties

There are currently 3 main varieties grown in Australia. These include: **Continental cucumbers**, also known as Telegraph cucumbers, the most common variety in Australia. Continental cucumbers accounted for **57%** of fresh production for the year ending June 2020.

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

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



production.

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

Seasonality by Cucumber Variety

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

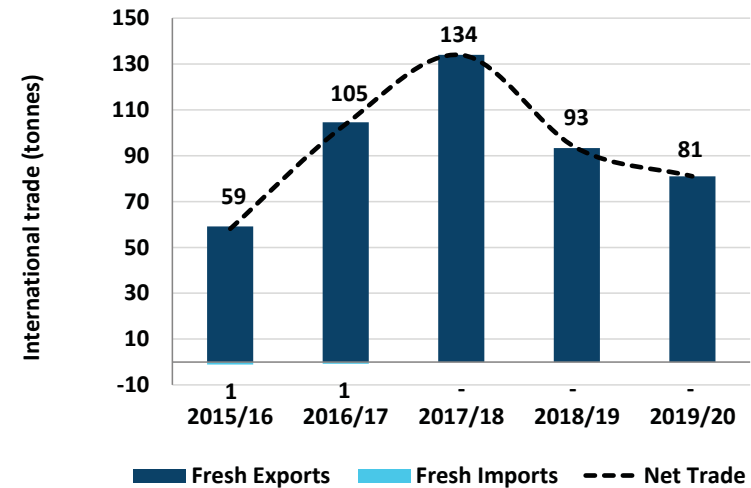
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Continental	54,565	High	High	High	High	High	High	High	High	High	High	High	High
Lebanese	29,674	High	High	High	High	High	High	High	High	High	High	High	High
Baby	10,527	High	High	High	High	High	High	High	High	High	High	High	High
Other	957	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Low	None							

Source: AUSVEG

Fresh Cucumbers International Trade

Australia is a net exporter of fresh cucumbers, typically exporting **60-130 tonnes** every year. For the year ending June 2020, Australia exported **81 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 Cucumbers International Trade

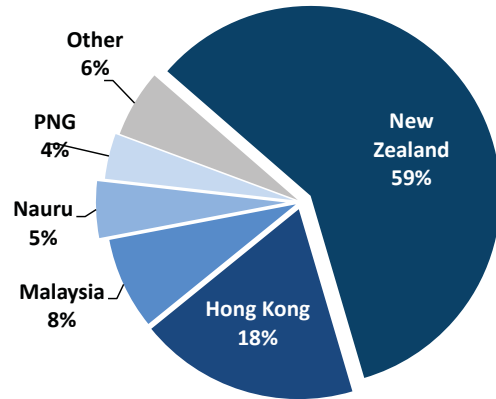


Source: GTA



For the year ending June 2020, **59%** of exported fresh cucumbers were sent to New Zealand, as profiled in the chart below.

2019/20 Fresh Cucumbers Exports by Country



Source: GTA

Fresh Cucumbers Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Queensland	119	79	57
Victoria	3	2	14
New South Wales	10	10	9
Western Australia	1	1	1
South Australia	< 0.5	1	-
Other	< 0.5	-	0
TOTAL	134	93	81

Fresh Cucumbers Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
New Zealand	89	70	48
Hong Kong	3	4	15
Malaysia	5	7	6
Nauru	11	2	4
PNG	10	4	3
Other	15	6	5
TOTAL	134	93	81

Source: GTA





Fresh Eggplants Overview

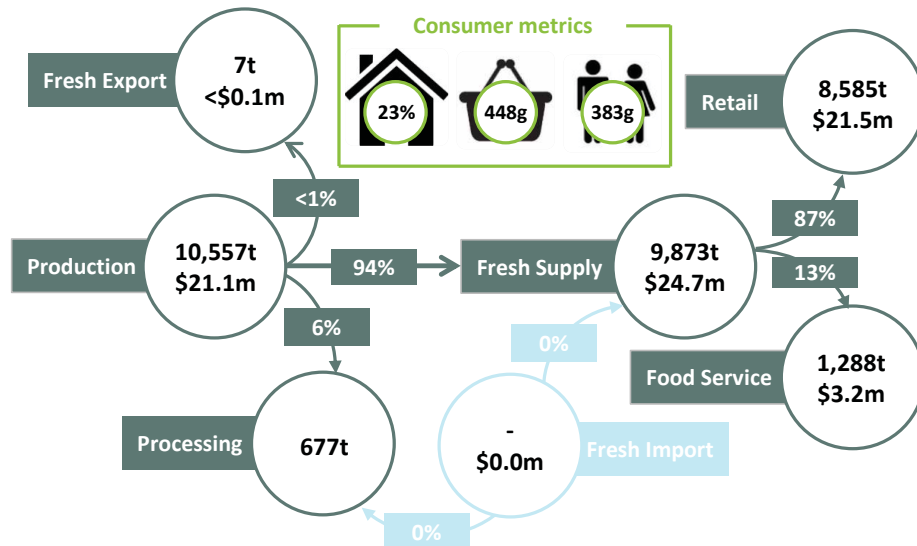
Eggplants are grown in most states of Australia, with the majority of production occurring along the east coast. Currently, most eggplants are grown outdoors. However, increasing volumes are being grown year-round in high-tech greenhouses in the southern states.



For the year ending June 2020:

- **10,557 t** produced and valued at **\$21.1 m** with **6%** sent to processing.
- The wholesale value of the fresh supply was **\$24.7 m**, with **\$21.5 m** distributed into retail and **\$3.2 m** into food service.
- **23%** of Australian households purchased eggplants, buying an average of **448 g** of eggplants per shopping trip.
- The supply per capita was **383 g**, based on the volume supplied.

Fresh Eggplants Supply Chain—Year Ending June 2020



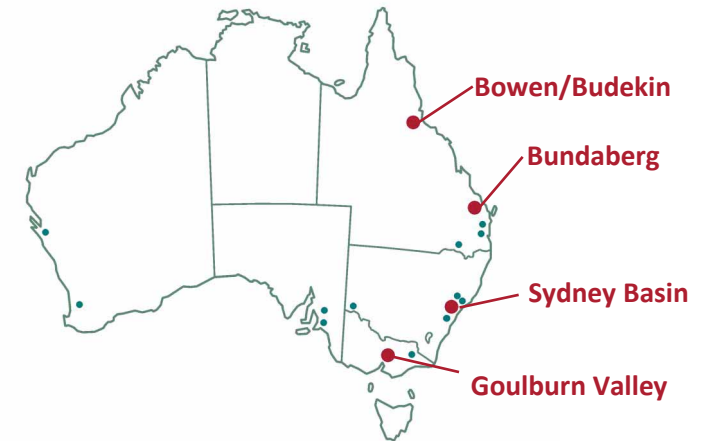
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,043	9,510	+5%	10,557	+11%
Production (\$m)	\$ 17.5	\$ 19.6	+12%	\$ 21.1	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	10	7	-30%	7	+3%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-7%	< \$0.1	+7%
Fresh Import Volume (t)	<1	<1	+60%	-	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	\$ -	-100%
Fresh Supply (t)	8,454	8,893	+5%	9,873	+11%
Fresh Supply Wholesale Value (\$m)	\$ 20.5	\$ 22.9	+12%	\$ 24.7	+8%
Supply per Capita (kg)	0.34	0.35	+4%	0.38	+8%
Retail Supply (t)	-	7,350	-	8,585	+17%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 18.9	-	\$ 21.5	+14%
Food Service Supply (t)	-	1,543	-	1,288	-17%
Food Service Wholesale Value (\$m)	\$ -	\$ 4.0	-	\$ 3.2	-19%

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

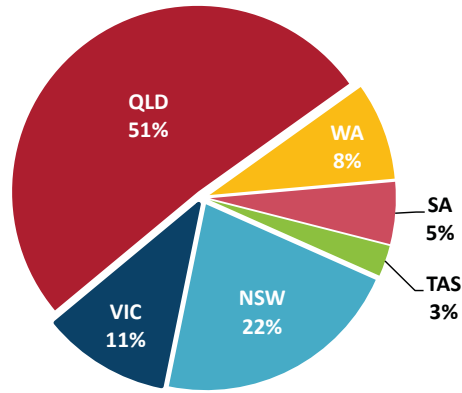
Major Eggplant Production Areas



Source: AUSVEG



2019/20 Fresh Eggplants Production by State



Source: AUSVEG

Fresh Eggplants Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,274	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	1,137	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	5,400	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	894	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	568	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	284	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High
		Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
		Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
		None	None	None	None	None	None	None	None	None	None	None	None

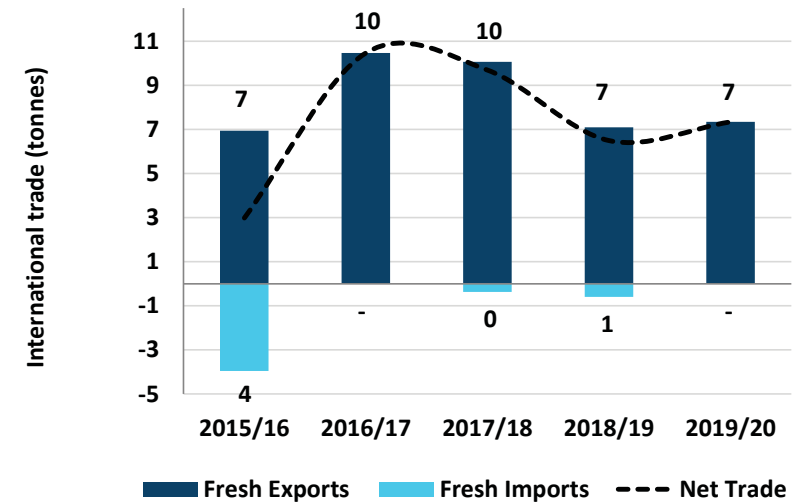
Source: AUSVEG

Fresh Eggplants International Trade

There is minimal trade of eggplants, with Australia typically exporting **7-10 tonnes** every year. For the year ending June 2020, Australia exported **7 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.



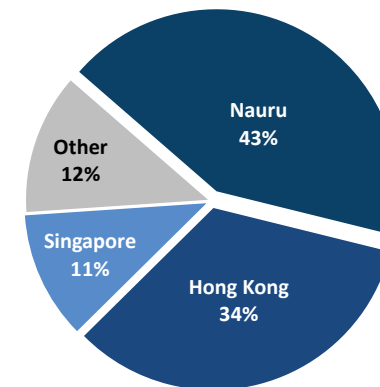
Net Fresh Eggplant International Trade



Source: GTA

For the year ending June 2020, **43%** of exported fresh eggplants were sent to Nauru, as profiled in the chart below.

2019/20 Fresh Eggplants Exports by Country



Source: GTA



Fresh Eggplants 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	-	Queensland	4	2	3
New South Wales	< 0.5	-	-	New South Wales	< 0.5	2	3
Other	< 0.5	-	-	Victoria	1	2	1
TOTAL	0	1	-	South Australia	3	1	1
				Western Australia	< 0.5	-	-
				Other	2	< 0.5	< 0.5
				TOTAL	10	7	7

Fresh Eggplants Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
India	< 0.5	1	-	Nauru	1	1	3
Other	< 0.5	-	-	Hong Kong	4	3	2
TOTAL	0	1	-	Singapore	1	< 0.5	1
				Malaysia	1	2	< 0.5
				Brunei	-	< 0.5	< 0.5
				Other	3	1	1
				TOTAL	10	7	7

Source: GTA





Fresh English Spinach/ Silverbeet/Kale Overview

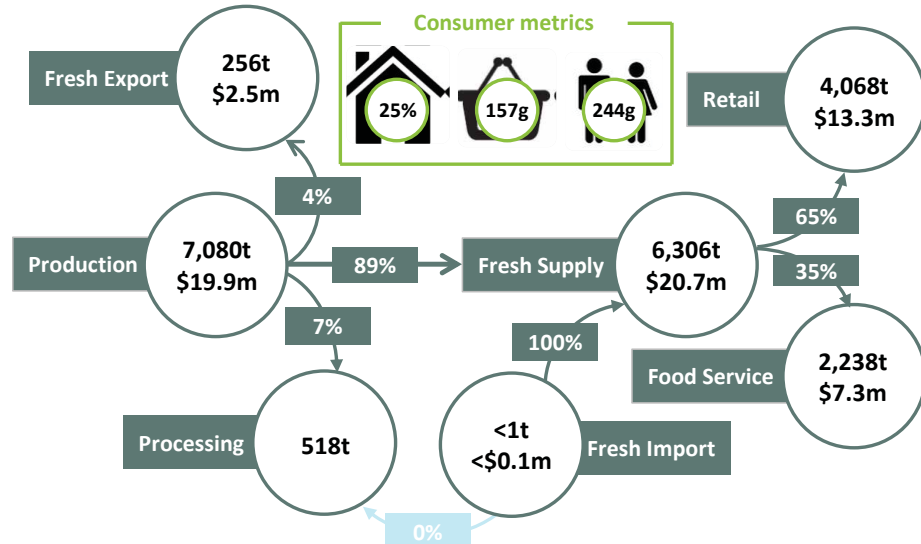
This section combines information on **English spinach, silverbeet** and **kale**. These categories are produced in most states of Australia.

For the year ending June 2020:

- **7,080 t** produced and valued at **\$19.9 m** with **7%** sent to processing.
- The wholesale value of the fresh supply was **\$20.7 m**, with **\$13.3 m** distributed into retail and **\$7.3 m** into food service.
- **25%** of Australian households purchased these categories, buying an average of **157 g** of English spinach, silverbeet and kale per shopping trip.
- The supply per capita was **244 g**, based on the volume supplied.



Fresh English Spinach/Silverbeet/Kale Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,028	7,061	<1%	7,080	<1%
Production (\$m)	\$ 19.3	\$ 16.6	-14%	\$ 19.9	+20%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	243	266	+10%	256	-4%
Fresh Export Value (\$m)	\$ 2.0	\$ 2.3	+18%	\$ 2.5	+10%
Fresh Import Volume (t)	31	65	>100%	<1	-99%
Fresh Import Value (\$m)	< \$0.1	\$ 0.1	>100%	< \$0.1	-98%
Fresh Supply (t)	6,302	6,343	<1%	6,306	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 20.8	\$ 17.3	-17%	\$ 20.7	+20%
Supply per Capita (kg)	0.25	0.25	>-1%	0.24	-3%
Retail Supply (t)	-	3,844	-	4,068	+6%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 10.5	-	\$ 13.3	+28%
Food Service Supply (t)	-	2,499	-	2,238	-10%
Food Service Wholesale Value (\$m)	\$ -	\$ 6.8	-	\$ 7.3	+8%

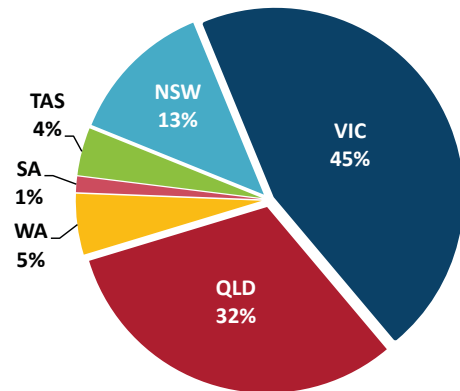
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Major English Spinach/Silverbeet/Kale Production Areas



Source: AUSVEG

2019/20 Fresh English Spinach/Silverbeet/Kale Production by State



Source: AUSVEG

Fresh English Spinach/Silverbeet/Kale Seasonality by State

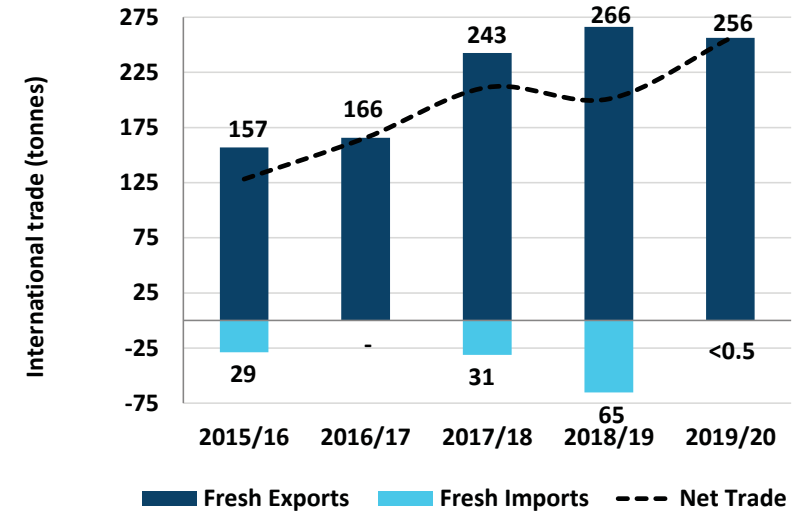
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	898	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	3,191	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	2,228	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	374	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	96	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	294	High	High	High	High	High	High	High	High	High	High	High	High
Imported	0	None	None	None	None	None	None	None	None	None	None	None	None
Availability legend		High	Medium	Low	None								

Source: AUSVEG

Fresh Spinach/Silverbeet International Trade

There is minimal trade of fresh English spinach, although Australia's exports have been increasing recently. For the year ending June 2020, Australia exported **256 tonnes**. There is currently no trade in fresh silverbeet. 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.

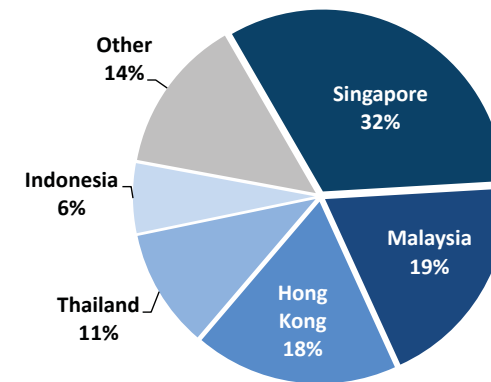
Net Fresh English Spinach International Trade



Source: GTA

For the year ending June 2020, **32%** of exported fresh English spinach was sent to Singapore, as profiled in the chart below.

2019/20 Fresh English Spinach Export by Country



Source: GTA

Fresh English Spinach 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	31	65	< 0.5	Victoria	130	162	230
Other	-	-	< 0.5	New South Wales	16	20	12
TOTAL	31	65	0	Western Australia	75	49	11
				Queensland	21	30	3
				South Australia	< 0.5	< 0.5	-
				Other	< 0.5	5	-
				TOTAL	243	266	256

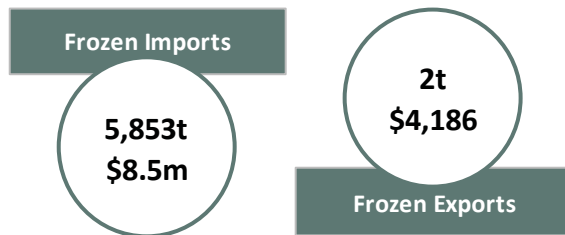
Fresh English Spinach Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Hong Kong	-	-	< 0.5	Singapore	64	59	83
US	31	65	-	Malaysia	82	69	49
China	-	1	-	Hong Kong	45	66	46
Other	-	-	< 0.5	Thailand	13	19	27
TOTAL	31	65	< 0.5	Indonesia	15	17	16
				Other	24	35	35
				TOTAL	243	266	256

Source: GTA

Processed Spinach International Trade

For the year ending June 2020, an additional **5,853 tonnes** of frozen spinach was imported, while **2 tonnes** were exported.



Source: GTA



Fresh Herbs Overview

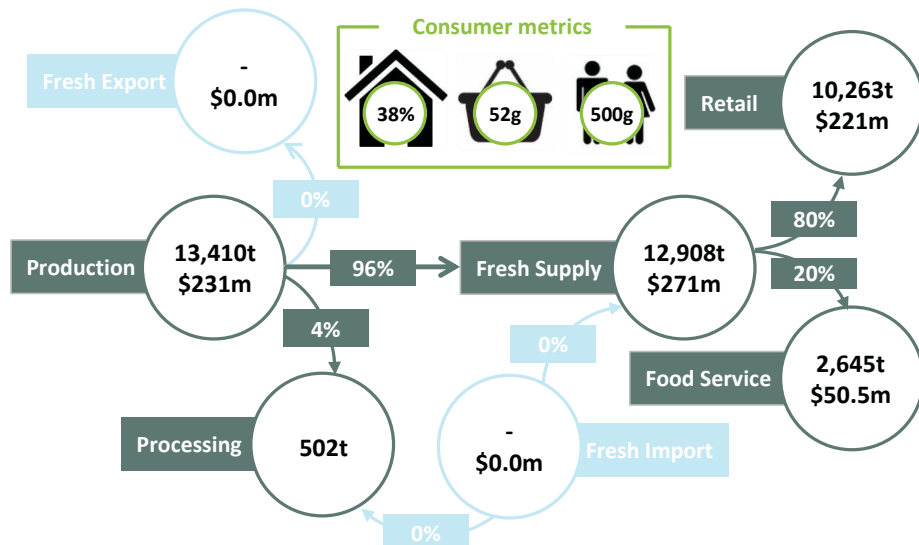
Pages 326-327 profile total fresh herb production and trade. They combine information on fennel, parsley and other fresh herbs. The following pages profile each fresh herb category in more detail.



For the year ending June 2020:

- **13,410 t** produced and valued at **\$231 m** with **4%** sent to processing.
- The wholesale value of the fresh supply was **\$271 m**, with **\$221 m** distributed into retail and **\$50.5 m** into food service.
- **38%** of Australian households purchased a fresh herb, buying an average of **52 g** of fresh herbs per shopping trip.
- The supply per capita was **500 g**, based on the volume supplied.

Fresh Herbs Supply Chain—Year Ending June 2020



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

Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,632	11,750	+1%	13,340	+14%
Production (\$m)	\$ 179.4	\$ 197.9	+10%	\$ 231.3	+17%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	11,196	11,312	+1%	12,839	+14%
Fresh Supply Wholesale Value (\$m)	\$ 210.4	\$ 232.0	+10%	\$ 271.2	+17%
Supply per Capita (kg)	0.45	0.45	>-1%	0.50	+11%
Retail Supply (t)	-	7,943	-	10,263	+29%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 165.4	-	\$ 220.9	+34%
Food Service Supply (t)	-	3,369	-	2,576	-24%
Food Service Wholesale Value (\$m)	\$ -	\$ 66.6	-	\$ 50.3	-24%

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





Fresh Fennel Overview

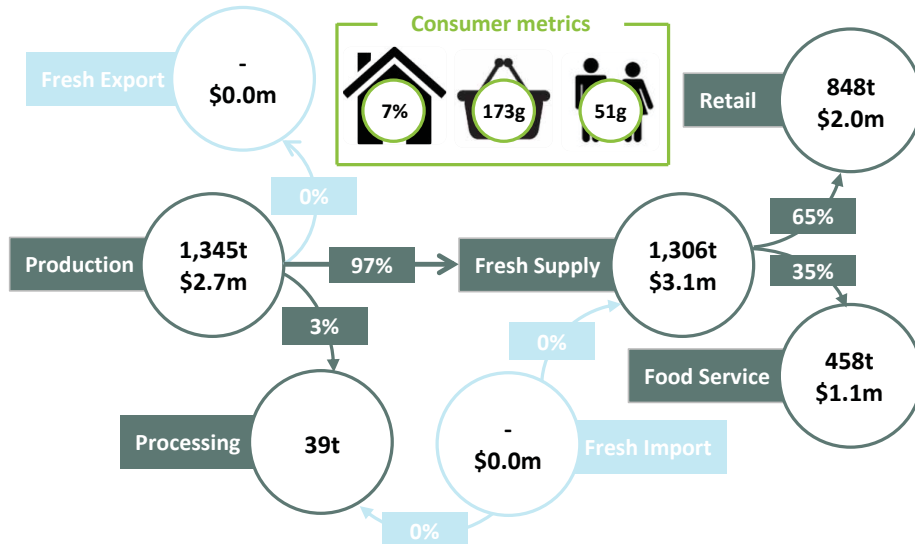
The majority of fennel is grown in Australia, with the majority of production being used in the fresh market.

For the year ending June 2020:

- **1,345 t** produced and valued at **\$2.7 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$3.1 m**, with **\$2.0 m** distributed into retail and **\$1.1 m** into food service.
- **7%** of Australian households purchased fennel, buying an average of **173g** of fennel per shopping trip.
- The supply per capita was **56 g**, based on the volume supplied.



Fresh Fennel Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,257	1,449	+15%	1,345	-7%
Production (\$m)	\$ 2.5	\$ 2.9	+15%	\$ 2.7	-7%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,221	1,407	+15%	1,306	-7%
Fresh Supply Wholesale Value (\$m)	\$ 2.9	\$ 3.4	+15%	\$ 3.1	-7%
Supply per Capita (kg)	0.05	0.06	+14%	0.05	-9%
Retail Supply (t)	-	868	-	848	-2%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 2.1	-	\$ 2.0	-2%
Food Service Supply (t)	-	539	-	458	-15%
Food Service Wholesale Value (\$m)	\$ -	\$ 1.3	-	\$ 1.1	-15%

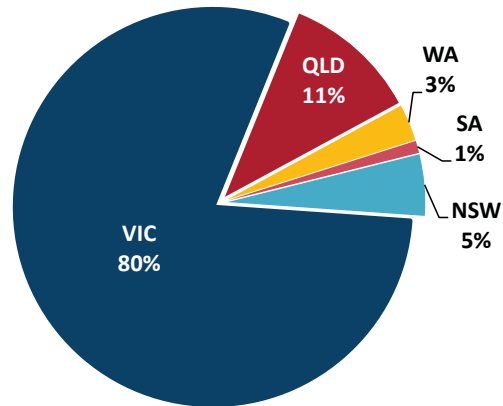
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Major Fennel Production Areas



Source: AUSVEG

2019/20 Fresh Fennel Production by State



Source: AUSVEG

Fresh Fennel Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	67												
Victoria	1,076												
Queensland	148												
Western Australia	40												
South Australia	13												
Availability legend		High	Medium	Low	None								

Source: AUSVEG





Fresh Parsley and other Fresh Herbs Overview

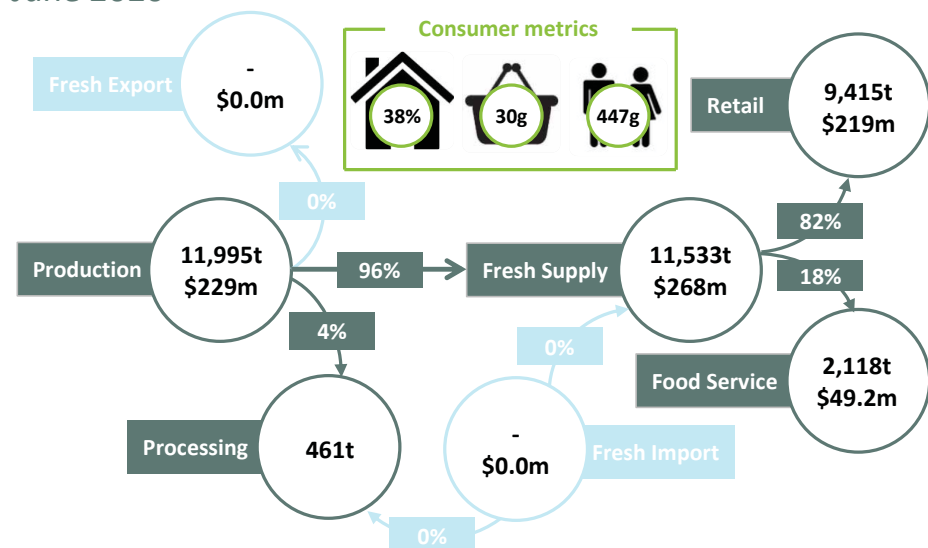
Fresh herbs, including parsley, are grown in most states of Australia, typically in market gardens near the major capitals. Increasingly volumes are being grown year-round in high-tech greenhouses in New South Wales.



For the year ending June 2020:

- **11,995 t** produced and valued at **\$228 m** with **4%** sent to processing.
- The wholesale value of the fresh supply was **\$268 m**, with **\$219 m** distributed into retail and **\$49.2 m** into food service.
- **38%** of Australian households purchased fresh herbs, buying an average of **30 g** of fresh herbs per shopping trip.
- The supply per capita was **447 g**, based on the volume supplied.

Fresh Parsley and Other Fresh Herbs Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	10,374	10,301	>-1%	11,995	+16%
Production (\$m)	\$ 176.9	\$ 195.0	+10%	\$ 228.7	+17%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	9,975	9,905	>-1%	11,533	+16%
Fresh Supply Wholesale Value (\$m)	\$ 207.4	\$ 228.6	+10%	\$ 268.1	+17%
Supply per Capita (kg)	0.40	0.39	-2%	0.45	+14%
Retail Supply (t)	-	7,075	-	9,415	+33%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 163.3	-	\$ 218.8	+34%
Food Service Supply (t)	-	2,830	-	2,118	-25%
Food Service Wholesale Value (\$m)	\$ -	\$ 65.3	-	\$ 49.2	-25%

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

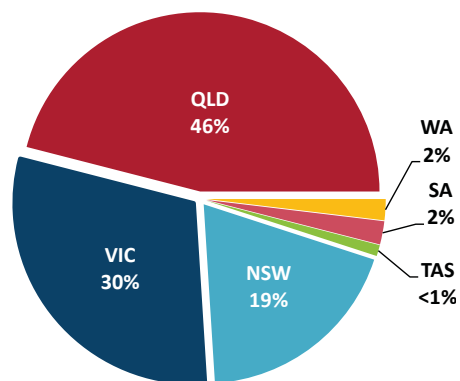
Major Parsley and other Herbs Production Areas



Source: AUSVEG



2019/20 Fresh Parsley and other Fresh Herbs Production by State



Source: AUSVEG

Fresh Parsley and other Fresh Herbs Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,279	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	3,598	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	5,518	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	228	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	252	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	120	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

Source: AUSVEG

Main Parsley and other Fresh Herbs Varieties

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

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

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



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

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

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

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

Seasonality by Parsley and other Fresh Herb Variety

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

Source: AUSVEG

Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Coriander	3,299	High	High	High	High	High	High	High	High	High	High	High	High
Parsley	3,059	High	High	High	High	High	High	High	High	High	High	High	High
Basil	1,979	High	High	High	High	High	High	High	High	High	High	High	High
Mint	1,080	High	High	High	High	High	High	High	High	High	High	High	High
Chives	540	High	High	High	High	High	High	High	High	High	High	High	High
Other	2,039	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High





Fresh Garlic Overview

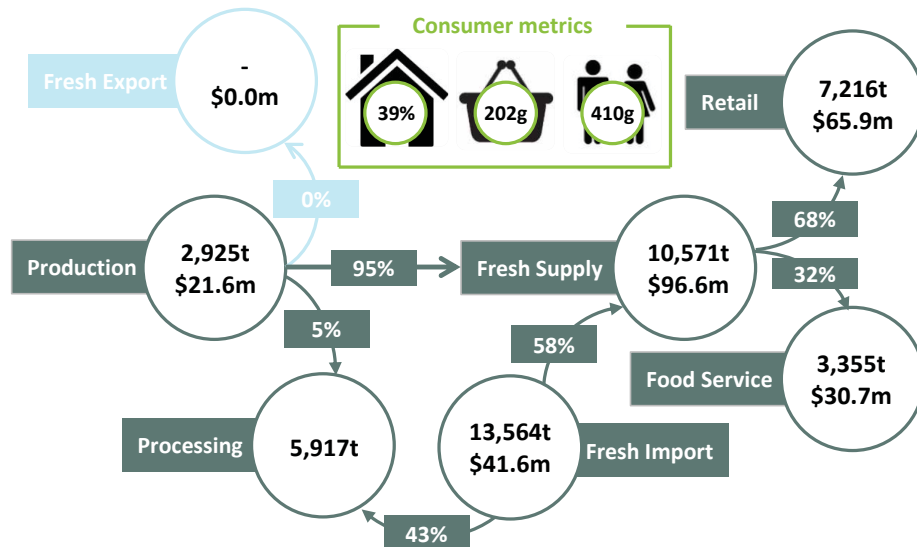
Australia has a small but growing garlic industry, with the majority of current fresh supply being sourced from imports. Garlic is grown around Australia, with significant volumes produced in Victoria, New South Wales and Queensland.



For the year ending June 2020:

- **2,925 t** produced and valued at **\$21.6 m** with **5%** sent to processing.
- The wholesale value of the fresh supply was **\$96.6 m**, with **\$65.9 m** distributed into retail and **\$30.7 m** into food service.
- **39%** of Australian households purchased fresh garlic, buying an average of **202 g** of garlic per shopping trip.
- The supply per capita was **410 g**, based on the volume supplied.

Fresh Garlic Supply Chain—Year Ending June 2020



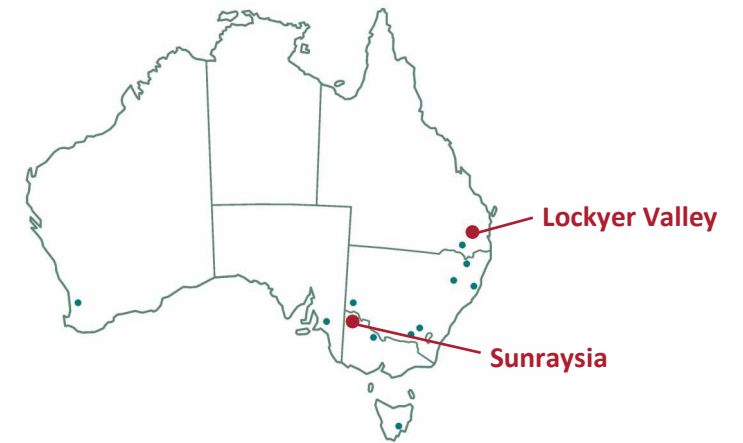
Sources: AC; Australian Garlic Industry Association (AGIA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,122	2,812	+33%	2,925	+4%
Production (\$m)	\$ 15.4	\$ 19.3	+26%	\$ 21.6	+12%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	12,224	13,060	+7%	13,564	+4%
Fresh Import Value (\$m)	\$ 27.5	\$ 28.3	+3%	\$ 41.6	+47%
Fresh Supply (t)	9,860	10,175	+3%	10,571	+4%
Fresh Supply Wholesale Value (\$m)	\$ 87.8	\$ 86.4	-2%	\$ 96.6	+12%
Supply per Capita (kg)	0.40	0.40	+2%	0.41	+1%
Retail Supply (t)	-	6,761	-	7,216	+7%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 57.4	-	\$ 65.9	+15%
Food Service Supply (t)	-	3,414	-	3,355	-2%
Food Service Wholesale Value (\$m)	\$ -	\$ 29.0	-	\$ 30.7	+6%

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

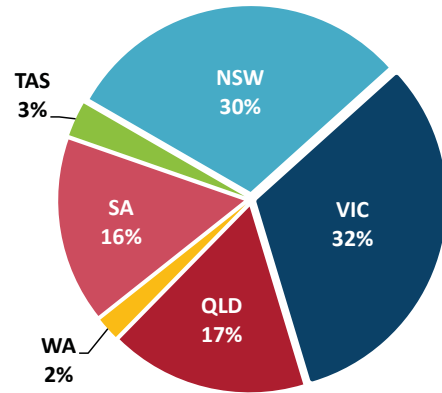
Major Garlic Production Areas



Source: AGIA



2019/20 Fresh Garlic Production by State



Source: AGIA

Fresh Garlic Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	877	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Victoria	936	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Queensland	497	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Western Australia	58	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
South Australia	468	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Tasmania	88	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Imported	13,564	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Availability legend		High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low

Source: AGIA, GTA

Main Garlic varieties

Although there are currently a number of varieties grown in Australia, production for the fresh market is dominated by 5 main varieties. These include:

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

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

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

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

Marbled purple stripe accounted for **2%** of fresh production.



Seasonality by Garlic Variety

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

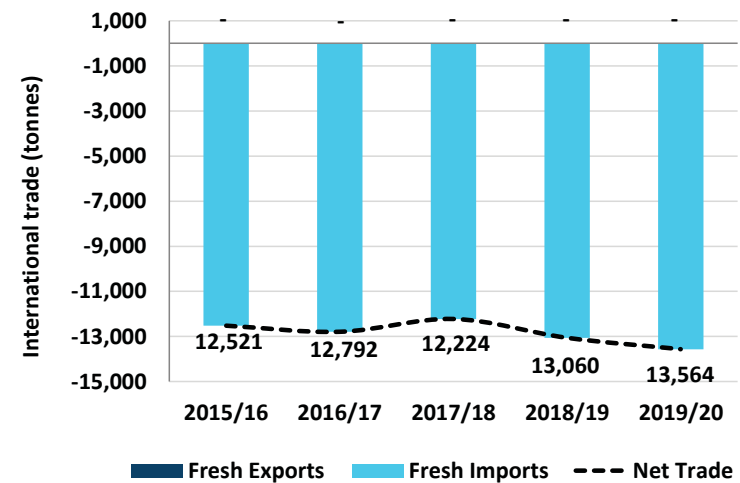
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Turban	1,755	High	High	High	High	High	High	High	High	High	High	High	High
Artichoke	585	High	High	High	High	High	High	High	High	High	High	High	High
Subtropical	439	High	High	High	High	High	High	High	High	High	High	High	High
Creole	88	High	High	High	High	High	High	High	High	High	High	High	High
Marbled Purple Stripe	58	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	None

Source: AGIA

Fresh Garlic International Trade

Australia is a net importer of fresh garlic importing **12,000-14,000 tonnes** annually. For the year ending June 2020, Australia imported **13,564 tonnes** of fresh garlic. 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 Garlic International Trade



Source: GTA



Fresh Garlic Imports and Exports by State

Imports by state destination (Tonnes)			
Year Ending June	2018	2019	2020
New South Wales	4,481	5,348	6,097
Victoria	4,258	4,654	4,094
Queensland	2,429	1,886	2,134
Western Australia	1,022	1,100	1,239
South Australia	34	72	-
TOTAL	12,224	13,060	13,564

Fresh Garlic Imports and Exports by Country

Imports by country (Tonnes)			
Year Ending June	2018	2019	2020
China	9,422	9,810	10,063
Mexico	668	589	1,108
Spain	1,169	1,491	1,087
Argentina	603	570	551
Egypt	144	369	373
Other	218	231	382
TOTAL	12,224	13,060	13,564

Source: GTA

Processed Garlic International Trade

For the year ending June 2020, **91 tonnes** of processed garlic was exported.



Source: GTA





Fresh Ginger Overview

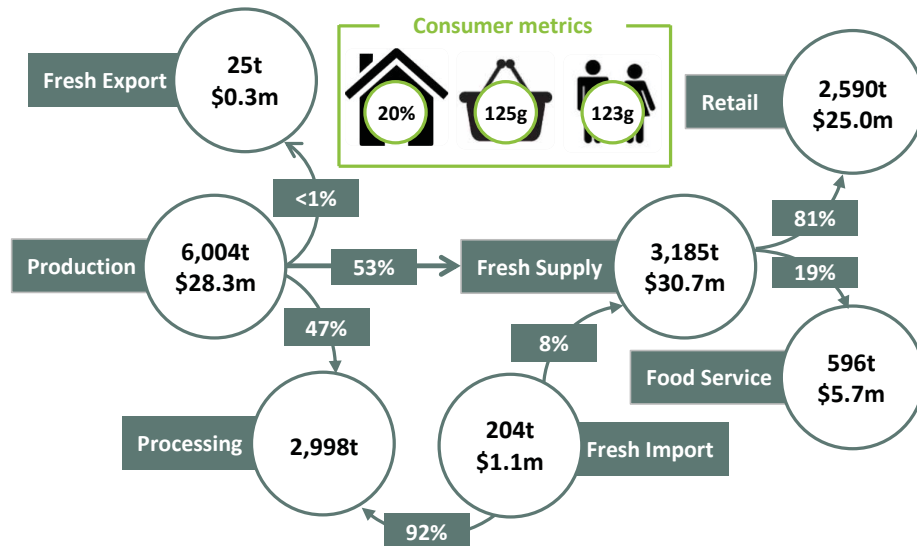
Australian ginger is grown mostly in Queensland. Processed ginger is often minced, candied and used in beverages. Australia imports fresh ginger, but the majority of these fresh imports are processed without entering the fresh supply chain. Fijian ginger has recently been granted access to the Australian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



For the year ending June 2020:

- **6,004 t** produced and valued at **\$28.3 m** with **47%** sent to processing.
- The wholesale value of the fresh supply was **\$30.7 m**, with **\$25 m** distributed into retail and **\$5.7 m** into food service.
- **20%** of Australian households purchased fresh ginger, buying an average of **125 g** of ginger per shopping trip.
- The supply per capita was **123g**, based on the volume supplied.

Fresh Ginger Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,234	6,991	-3%	6,004	-14%
Production (\$m)	\$ 48.7	\$ 26.8	-45%	\$ 28.3	+6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	9	16	+84%	25	+59%
Fresh Export Value (\$m)	\$ 0.1	\$ 0.2	+34%	\$ 0.3	+55%
Fresh Import Volume (t)	224	216	-3%	204	-6%
Fresh Import Value (\$m)	\$ 0.7	\$ 0.9	+23%	\$ 1.1	+18%
Fresh Supply (t)	3,857	3,721	-4%	3,185	-14%
Fresh Supply Wholesale Value (\$m)	\$ 53.3	\$ 29.2	-45%	\$ 30.7	+5%
Supply per Capita (kg)	0.15	0.15	-5%	0.12	-16%
Retail Supply (t)	-	2,907	-	2,590	-11%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 22.8	-	\$ 25.0	+10%
Food Service Supply (t)	-	814	-	596	-27%
Food Service Wholesale Value (\$m)	\$ -	\$ 6.4	-	\$ 5.7	-10%

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

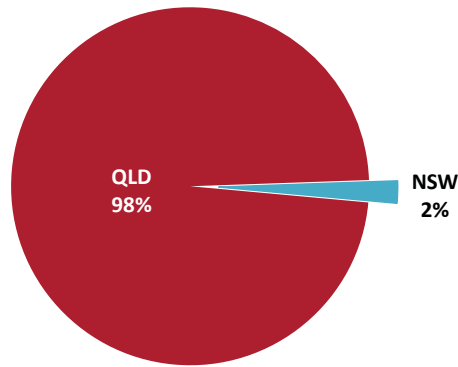
Major Ginger Production Areas



Source: AUSVEG



2019/20 Fresh Ginger Production by State



Source: AUSVEG

Fresh Ginger Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	120												
Queensland	5,884												
Imported	204												
Availability legend			High		Medium			Low					None

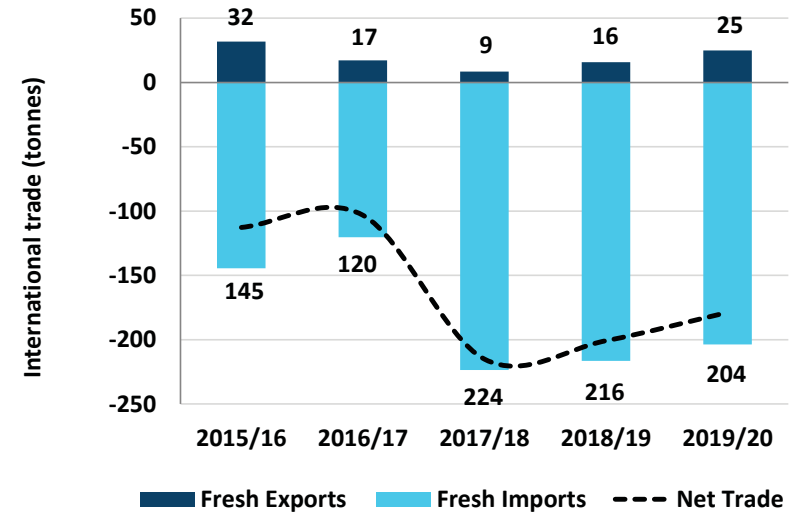
Source: AUSVEG

Fresh Ginger International Trade

Australia is a net importer of fresh ginger, although traditionally this has all been used in the processing industry without being allowed to enter the fresh supply chain. However Fijian ginger now has fresh market access. Due to the way trade data is recorded, fresh and crushed ginger was recorded without differentiation prior to 2012, but has been differentiated since. The exports and imports over the last 5 financial years are profiled in the graph to the right, where imports are counted as negative tonnes.



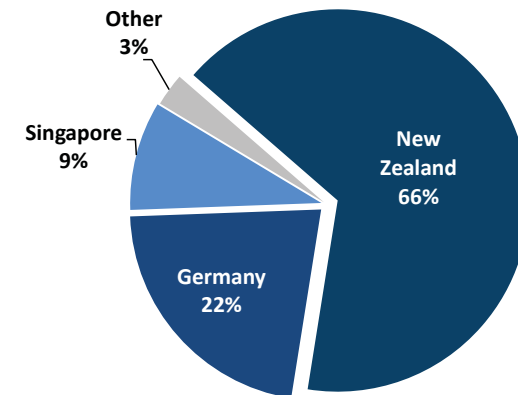
Net Fresh Ginger International Trade



Source: GTA

For the year ending June 2020, **66%** of exported fresh ginger was sent to New Zealand, as profiled in the chart below.

2019/20 Fresh Ginger Exports by Country



Source: GTA



Fresh Ginger 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	84	94	93	New South Wales	4	13	22
New South Wales	93	86	80	Victoria	4	1	3
Queensland	30	26	21	Queensland	< 0.5	2	< 0.5
Western Australia	11	11	8	Other	< 0.5	-	< 0.5
South Australia	5	< 0.5	1	TOTAL	9	16	25
Other	< 0.5	< 0.5	-				
TOTAL	224	216	204				

Fresh Ginger 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	78	107	85	New Zealand	7	14	16
Vietnam	71	70	48	Germany	< 0.5	1	5
India	8	9	26	Singapore	< 0.5	< 0.5	2
Thailand	37	20	19	Philippines	1	-	< 0.5
Fiji	14	2	13	Fiji	-	-	< 0.5
Other	16	9	12	Other	1	1	1
TOTAL	224	216	204	TOTAL	9	16	25

Source: GTA

Processed Ginger International Trade

For the year ending June 2020, **1.2 tonnes** of preserved ginger was imported, while **547 tonnes** were exported.



Source: GTA





Fresh Head Lettuce

Overview

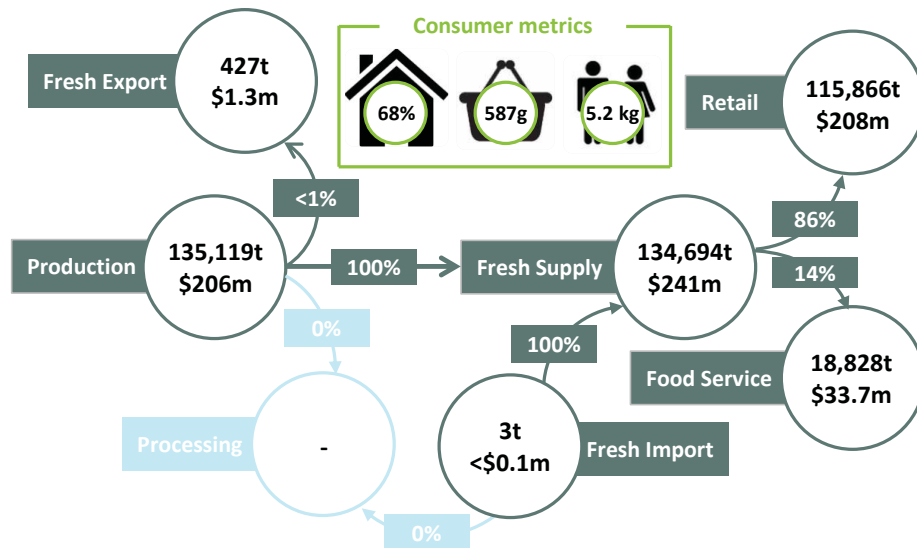
Head lettuce refers to lettuce products that are typically sold in a headed form, such as iceberg, cos and oak lettuces. Fresh lettuce leaves predominantly sold loose are covered in **Leafy Salad Vegetables** on page 352. Head lettuces are typically grown close to the major population centres, across most states.



For the year ending June 2020:

- **135,119 t** produced and valued at **\$206 m**.
- The wholesale value of the fresh supply was **\$241 m**, with **\$208 m** distributed into retail and **\$33.7 m** into food service.
- **68%** of Australian households purchased head lettuce, buying an average of **587 g** of head lettuce per shopping trip.
- The supply per capita was **5.2 kg**, based on the volume supplied.

Fresh Head Lettuce Supply Chain—Year Ending June 2020



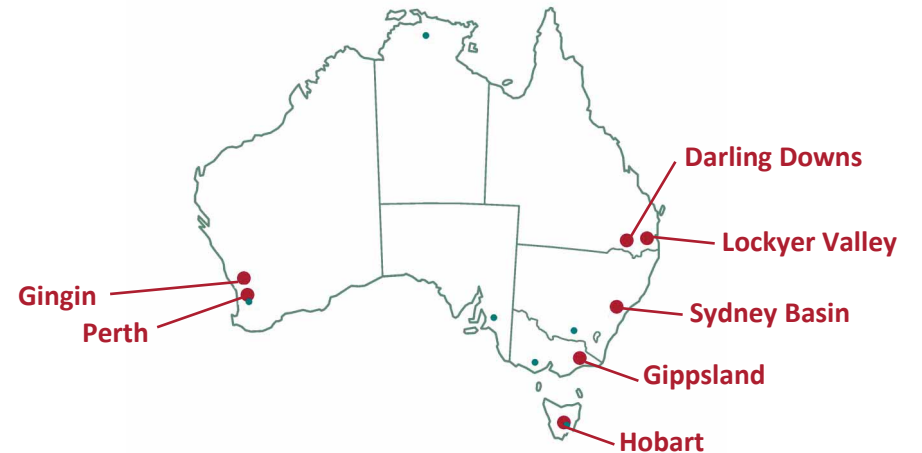
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	138,485	136,938	-1%	135,119	-1%
Production (\$m)	\$ 147.1	\$ 172.8	+18%	\$ 206.2	+19%
Production area (Ha)	7,784	-	-	-	-
Fresh Export Volume (t)	432	565	+31%	427	-24%
Fresh Export Value (\$m)	\$ 1.7	\$ 1.8	+6%	\$ 1.3	-28%
Fresh Import Volume (t)	-	-	-	3	-
Fresh Import Value (\$m)	\$ -	\$ -	-	< \$0.1	-
Fresh Supply (t)	138,052	136,373	-1%	134,694	-1%
Fresh Supply Wholesale Value (\$m)	\$ 171.4	\$ 201.5	+18%	\$ 241.3	+20%
Supply per Capita (kg)	5.54	5.41	-2%	5.22	-4%
Retail Supply (t)	-	115,326	-	115,866	<1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 170.4	-	\$ 207.6	+22%
Food Service Supply (t)	-	21,047	-	18,828	-11%
Food Service Wholesale Value (\$m)	\$ -	\$ 31.1	-	\$ 33.7	+8%

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

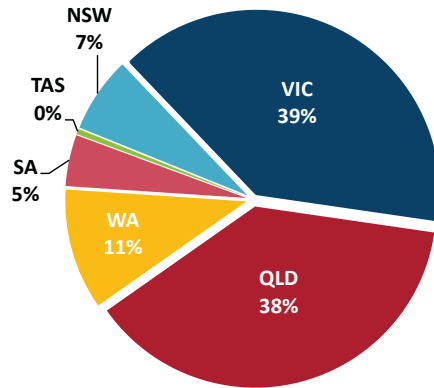
Major Head Lettuce Production Areas



Sources: AUSVEG



2019/20 Fresh Head Lettuce Production by State



Source: ABS

Fresh Head Lettuce Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	9,139	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	53,261	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	51,285	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	14,586	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	6,197	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	643	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low	None								

Source: AUSVEG

Main Head Lettuce Varieties

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

Iceberg, a tight headed spherical head lettuce. Iceberg lettuce accounted for **75%** of fresh production for the year ending June 2020.

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

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



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

Seasonality by Head Lettuce Variety

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

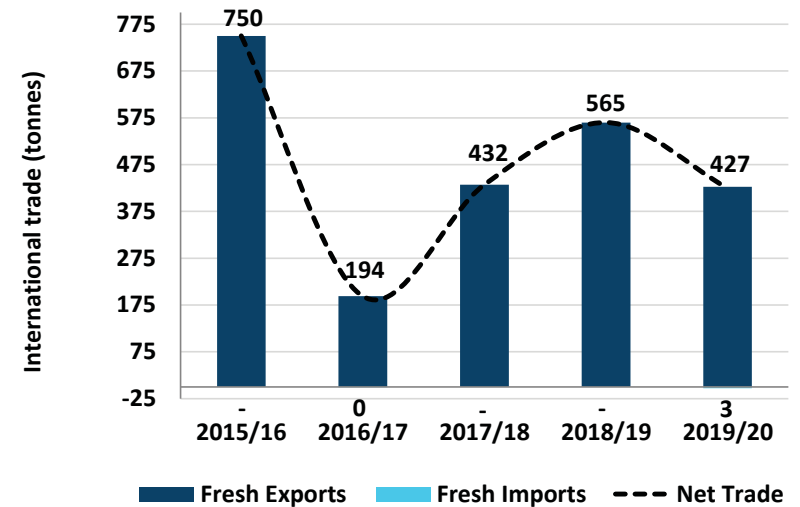
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Iceberg	101,603	High	High	High	High	High	High	High	High	High	High	High	High
Cos	26,752	High	High	High	High	High	High	High	High	High	High	High	High
Oak	5,269	High	High	High	High	High	High	High	High	High	High	High	High
Other Fancy	1,486	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low	None								

Source: AUSVEG

Fresh Head Lettuce International Trade

Australia has a small trade in head lettuce. For the year ending June 2020, Australia exported **427 tonnes** of fresh head lettuce. 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 Head Lettuce International Trade

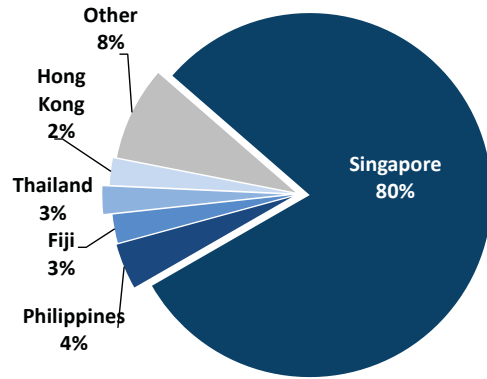


Source: GTA



For the year ending June 2020, **80%** of exported fresh head lettuce was sent to Singapore, as profiled in the chart below.

2019/20 Head Lettuce Exports by Country



Source: GTA

Fresh Head Lettuce 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
Western Australia	-	-	3	Western Australia	228	379	292
TOTAL	-	-	3	Victoria	46	76	55
				Queensland	68	32	46
				New South Wales	90	77	33
				South Australia	<0.5	1	1
				Other	<0.5	1	<0.5
				TOTAL	432	565	427

Fresh Head Lettuce 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	-	-	3	Singapore	323	444	343
TOTAL	-	-	3	Philippines	3	36	17
				Fiji	14	16	11
				Thailand	4	4	10
				Hong Kong	13	10	10
				Other	76	54	36
				TOTAL	432	565	427

Source: GTA





Fresh Leafy Asian Vegetables Overview

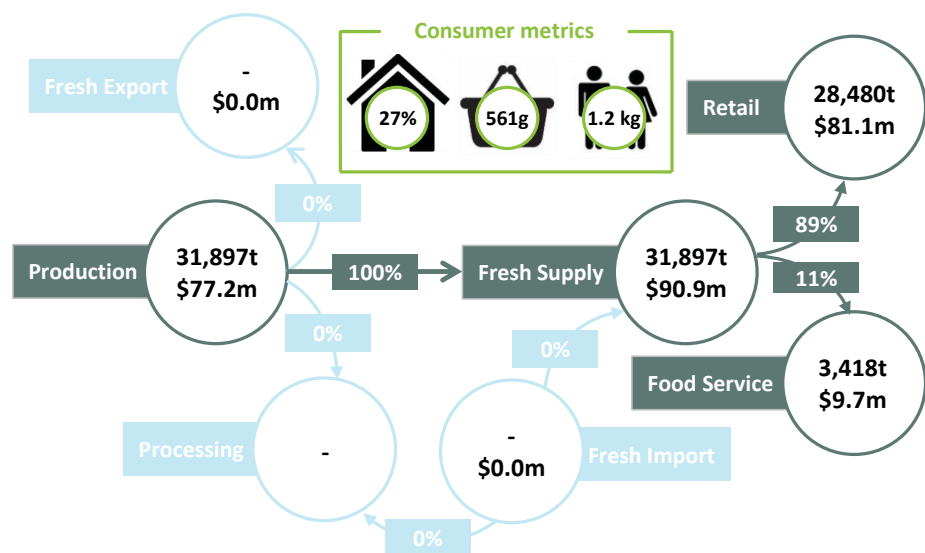
Leafy Asian vegetables covers a range of similar vegetables such as bok choy, pak choy, gai lan and wombok (Chinese cabbage). These varieties are sometimes referred to with different names. The most common name has been used in this report.



For the year ending June 2020:

- **31,897 t** produced and valued at **\$77.2 m**.
- The wholesale value of the fresh supply was **\$90.9 m**, with **\$81.1 m** distributed into retail and **\$9.7 m** into food service.
- **27%** of Australian households purchased leafy Asian vegetables, buying an average of **551 g** of leafy Asian vegetables per shopping trip.
- The supply per capita was **1.2 kg**, based on the volume supplied.

Fresh Leafy Asian Vegetables Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	28,541	29,229	+2%	31,897	+9%
Production (\$m)	\$ 64.5	\$ 65.9	+2%	\$ 77.2	+17%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	28,541	29,229	+2%	31,897	+9%
Fresh Supply Wholesale Value (\$m)	\$ 75.9	\$ 77.5	+2%	\$ 90.9	+17%
Supply per Capita (kg)	1.14	1.16	+1%	1.24	+7%
Retail Supply (t)	-	25,416	-	28,480	+12%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 67.4	-	\$ 81.1	+20%
Food Service Supply (t)	-	3,812	-	3,418	-10%
Food Service Wholesale Value (\$m)	\$ -	\$ 10.1	-	\$ 9.7	-4%

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

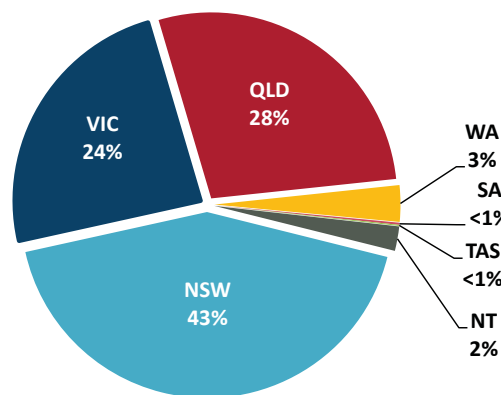
Major Leafy Asian Vegetable Production Areas

Most leafy Asian vegetables are grown close to the major population centres in market gardens, across most states of Australia.



Source: AUSVEG

2019/20 Leafy Asian Vegetables Production by State



Source: AUSVEG

Fresh Leafy Asian Vegetables Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	13,606	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	7,620	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	8,897	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	1,011	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	59	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	27	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	678	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

Source: AUSVEG

Main Leafy Asian Vegetable Varieties

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

Wombok, also known as Chinese cabbage, accounted for **38%** of fresh production volume for the year ending June 2020.

Pak Choy accounted for **28%** of fresh production for the year ending June 2020.

Bok Choy accounted for **15%** of fresh production for the year ending June 2020.

Baby Choy varieties accounted for **7%** of fresh production for the year ending June 2020.

Choy Sum accounted for **5%** of fresh production for the year ending June 2020.

Gai Lan, also known as Chinese broccoli, accounted for **4%** of fresh production for the year ending June 2020.

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

Seasonality by Leafy Asian Vegetable 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
Wombok	12,121	High	High	High	High	High	High	High	High	High	High	High	High
Pak Choy	8,931	High	High	High	High	High	High	High	High	High	High	High	High
Bok Choy	4,785	High	High	High	High	High	High	High	High	High	High	High	High
Baby Choy	2,233	High	High	High	High	High	High	High	High	High	High	High	High
Choy Sum	1,595	High	High	High	High	High	High	High	High	High	High	High	High
Gai Lan	1,308	High	High	High	High	High	High	High	High	High	High	High	High
Other	925	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	High	High	High	High	High	High	High	High	High

Source: AUSVEG





Fresh Leafy Salad Overview

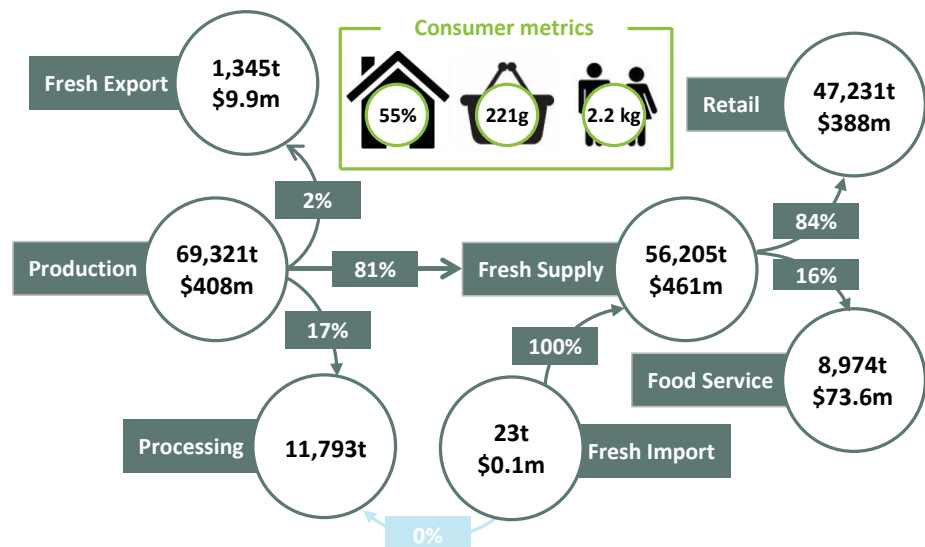
Leafy salad vegetables refers to a number of varieties of leafy vegetables that are typically sold in a loose form, such as rocket and baby spinach. Approximately **17%** of the production of each leafy salad vegetable (including the root mass) is cut off before being sold. This has been included in the processing total below.



For the year ending June 2020:

- **69,321 t** produced and valued at **\$407.5 m** with **17%** cut off.
- The wholesale value of the fresh supply was **\$461 m**, with **\$388 m** distributed into retail and **\$73.6 m** into food service.
- **55%** of Australian households purchased leafy salad vegetables, buying an average of **221 g** of leafy salad vegetables per shopping trip.
- The supply per capita was **2.1 kg**, based on the volume supplied.

Fresh Leafy Salad Supply Chain—Year Ending June 2020



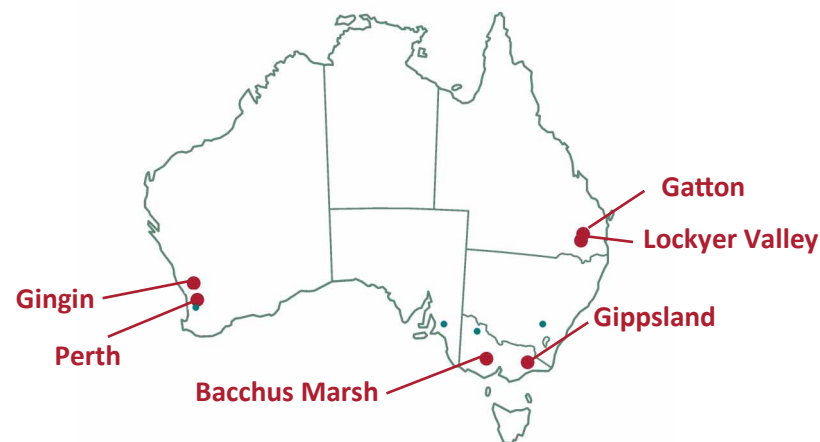
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	56,204	67,044	+19%	69,321	+3%
Production (\$m)	\$ 348.2	\$ 396.3	+14%	\$ 407.5	+3%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	1,358	1,518	+12%	1,345	-11%
Fresh Export Value (\$m)	\$ 9.4	\$ 11.0	+16%	\$ 9.9	-9%
Fresh Import Volume (t)	-	18	-	23	+25%
Fresh Import Value (\$m)	\$ -	\$ 0.1	-	\$ 0.1	+30%
Fresh Supply (t)	45,284	54,138	+20%	56,205	+4%
Fresh Supply Wholesale Value (\$m)	\$ 392.8	\$ 447.1	+14%	\$ 461.2	+3%
Supply per Capita (kg)	1.82	2.15	+18%	2.18	+1%
Retail Supply (t)	-	43,311	-	47,231	+9%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 357.7	-	\$ 387.5	+8%
Food Service Supply (t)	-	10,828	-	8,974	-17%
Food Service Wholesale Value (\$m)	\$ -	\$ 89.4	-	\$ 73.6	-18%

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

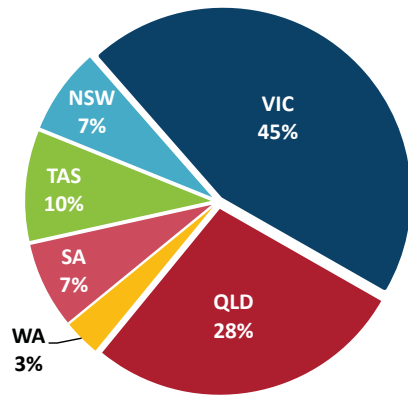
Major Leafy Salad Vegetable Production Areas



Source: AUSVEG



2019/20 Fresh Leafy Salad Vegetables Production by State



Source: AUSVEG

Fresh Leafy Salad Vegetables Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,163												
Victoria	30,979												
Queensland	19,178												
Western Australia	2,199												
South Australia	5,163												
Tasmania	6,638												
Availability legend			High		Medium		Low						None

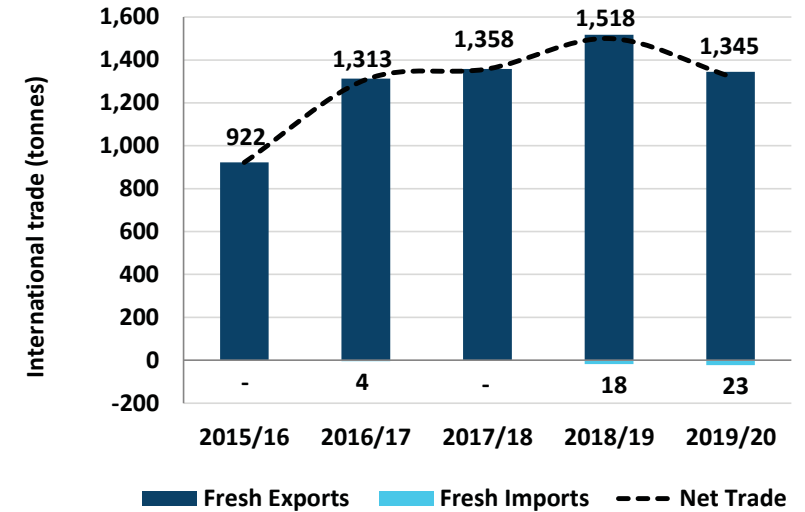
Source: AUSVEG

Fresh Leafy Salad Vegetables International Trade

Australia is a net exporter of leafy salad vegetables. For the year ending June 2020, Australia exported **1,345 tonnes** of fresh leafy salad vegetables. 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.



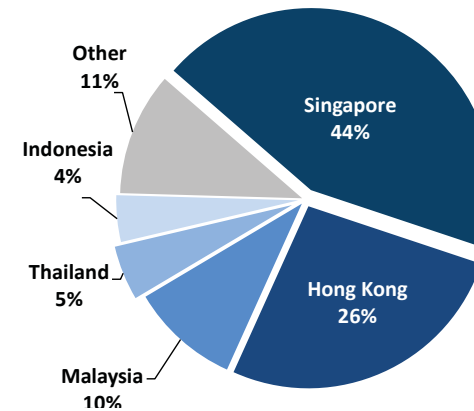
Net Fresh Leafy Salad Vegetables International Trade



Source: GTA

For the year ending June 2020, **44%** of exported fresh leafy salad vegetables were sent to Singapore, as profiled in the chart below.

2019/20 Fresh Leafy Salad Vegetables Exports by Country



Source: GTA



Fresh Leafy Salad Vegetables 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	-	18	23	Victoria	857	952	932
TOTAL	-	18	23	Queensland	207	252	150
				New South Wales	123	206	134
				Western Australia	170	106	126
				Northern Territory	-	-	3
				Other	1	2	< 0.5
				TOTAL	1,358	1,518	1,345

Fresh Leafy Salad Vegetables 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	-	18	22	Singapore	614	566	588
US	-	-	1	Hong Kong	380	498	358
Italy	-	-	< 0.5	Malaysia	73	137	131
Other	-	-	< 0.5	Thailand	56	59	65
TOTAL	-	18	23	Indonesia	66	79	56
				Other	171	180	147
				TOTAL	1,358	1,518	1,345

Source: GTA





Fresh Leeks Overview

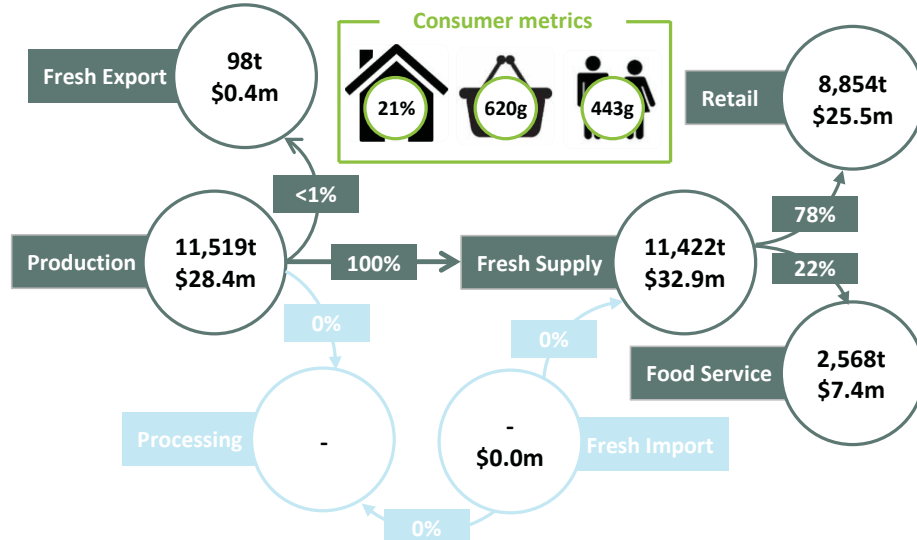
Leeks are grown predominantly in Victoria. Almost all of the leeks grown in Australia are destined for the fresh market.

For the year ending June 2020:

- **11,519 t** produced and valued at **\$28.4 m**.
- The wholesale value of the fresh supply was **\$32.9 m**, with **\$25.5 m** distributed into retail and **\$7.4 m** into food service.
- **21%** of Australian households purchased leeks, buying an average of **620 g** of leeks per shopping trip.
- The supply per capita was **443 g**, based on the volume supplied.



Fresh Leeks Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	8,736	10,809	+24%	11,519	+7%
Production (\$m)	\$ 21.0	\$ 25.7	+23%	\$ 28.4	+10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	124	156	+26%	98	-38%
Fresh Export Value (\$m)	\$ 0.6	\$ 0.6	+8%	\$ 0.4	-28%
Fresh Import Volume (t)	29	-	-100%	-	-
Fresh Import Value (\$m)	\$ 0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	8,641	10,653	+23%	11,422	+7%
Fresh Supply Wholesale Value (\$m)	\$ 24.2	\$ 29.7	+23%	\$ 32.9	+11%
Supply per Capita (kg)	0.35	0.42	+22%	0.44	+5%
Retail Supply (t)	-	7,664	-	8,854	+16%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 21.3	-	\$ 25.5	+20%
Food Service Supply (t)	-	2,989	-	2,568	-14%
Food Service Wholesale Value (\$m)	\$ -	\$ 8.3	-	\$ 7.4	-11%

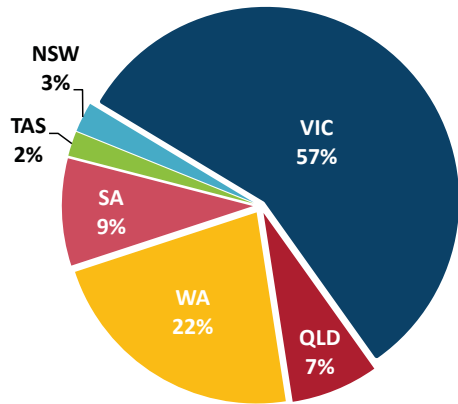
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Major Leek Production Areas



Source: AUSVEG

2019/20 Fresh Leeks Production by State



Source: AUSVEG

Fresh Leeks Seasonality by State

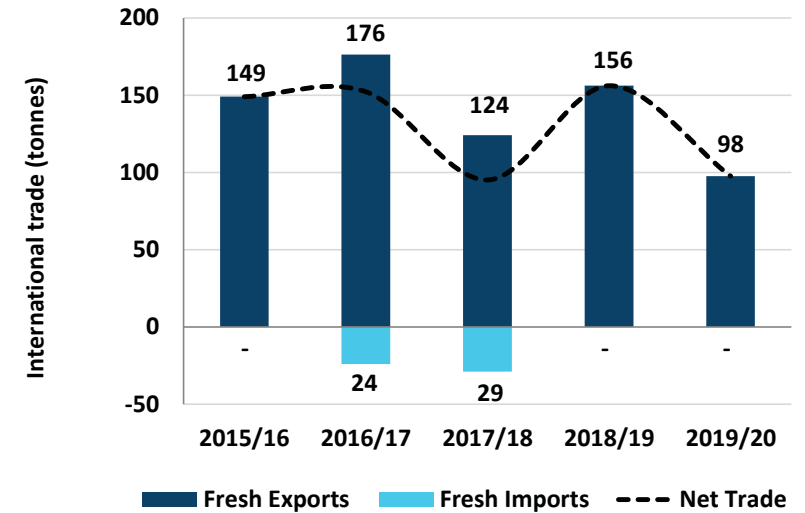
State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	290	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	6,511	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	853	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	2,580	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	1,044	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	240	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	High	Medium	Medium	Low	Low	None	None	None	None	None

Source: AUSVEG

Fresh Leeks International Trade

Australia has a small trade in leeks. For the year ending June 2020, Australia exported **98 tonnes** of fresh leeks. 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.

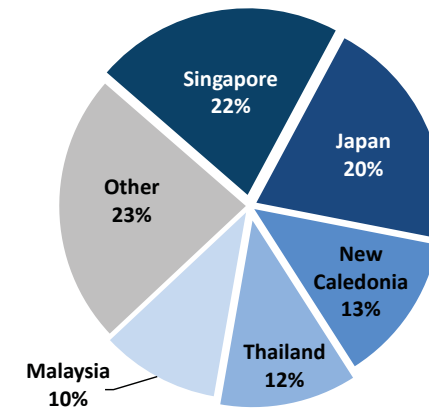
Net Fresh Leeks International Trade



Source: GTA

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

2019/20 Fresh Leeks Exports by Country



Source: GTA



Fresh Leeks Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
Victoria	90	98	63
New South Wales	13	10	22
Queensland	18	42	9
Western Australia	3	5	4
South Australia	1	1	< 0.5
Other	< 0.5	< 0.5	< 0.5
TOTAL	124	156	98

Fresh Leeks Imports and Exports by Country

Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
Singapore	12	44	21
Japan	34	41	20
New Caledonia	22	15	13
Thailand	4	8	12
Malaysia	8	12	10
Other	44	36	23
TOTAL	124	156	98

Source: GTA





Mushrooms

Fresh Mushrooms Overview

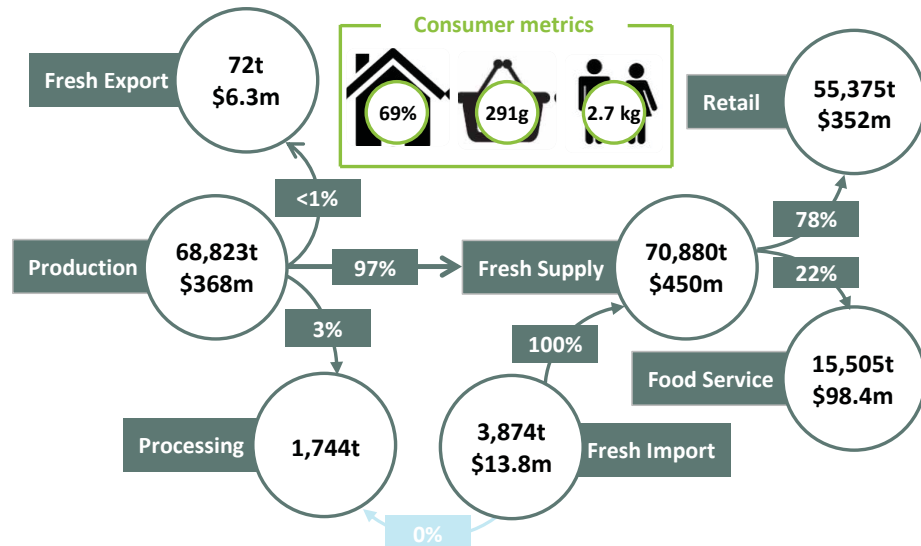
Mushrooms refer to a number of edible mushrooms grown for human consumption, including *agaricus bisporus* (button, cup, flat and brown mushrooms), as well as a number of exotic varieties including shiimeji and oyster mushrooms. Mushrooms are grown in most states of Australia, close to population centres.



For the year ending June 2020:

- **68,823 t** produced and valued at **\$367.8 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$450 m**, with **\$352 m** distributed into retail and **\$98.4 m** into food service.
- **69%** of Australian households purchased mushrooms, buying an average of **291 g** of mushrooms per shopping trip.
- The supply per capita was **2.7 kg**, based on the volume supplied.

Fresh Mushrooms Supply Chain—Year Ending June 2020



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

Mushrooms



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	70,463	72,006	+2%	68,823	-4%
Production (\$m)	\$ 456.6	\$ 437.7	-4%	\$ 367.8	-16%
Production area (Ha)	173	-	-	-	-
Fresh Export Volume (t)	89	71	-20%	72	+1%
Fresh Export Value (\$m)	\$ 6.8	\$ 7.5	+9%	\$ 6.3	-16%
Fresh Import Volume (t)	3,288	3,839	+17%	3,874	<1%
Fresh Import Value (\$m)	\$ 11.1	\$ 13.2	+19%	\$ 13.8	+4%
Fresh Supply (t)	71,877	73,949	+3%	70,880	-4%
Fresh Supply Wholesale Value (\$m)	\$ 554.5	\$ 534.1	-4%	\$ 450.0	-16%
Supply per Capita (kg)	2.88	2.93	+2%	2.75	-6%
Retail Supply (t)	-	53,586	-	55,375	+3%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 387.0	-	\$ 351.6	-9%
Food Service Supply (t)	-	20,363	-	15,505	-24%
Food Service Wholesale Value (\$m)	\$ -	\$ 147.1	-	\$ 98.4	-33%

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

Major Mushroom Production Areas

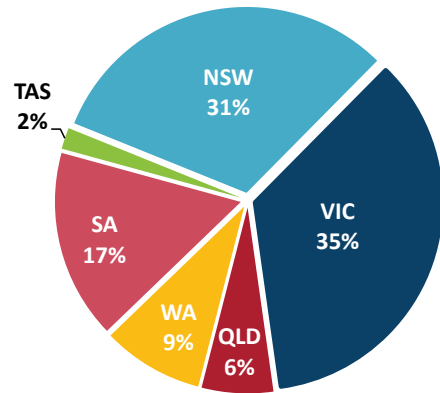


Source: AMGA



Mushrooms

2019/20 Fresh Mushrooms Production by State



Source: AMGA

Fresh Mushrooms Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	21,541												
Victoria	24,337												
Queensland	4,276												
Western Australia	6,063												
South Australia	11,329												
Tasmania	1,277												
Availability legend			High		Medium		Low						None

Source: AMGA

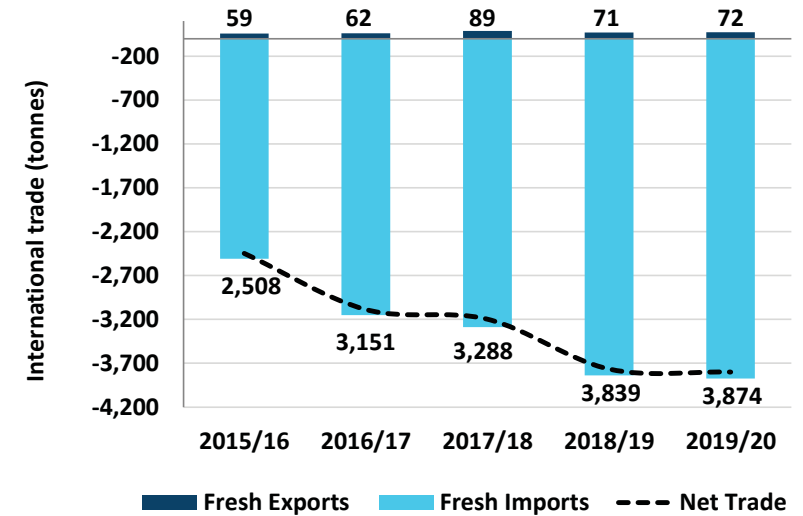
Fresh Mushrooms International Trade

Australia is a net importer of fresh mushrooms. For the year ending June 2020, Australia imported **3,874 tonnes** of fresh mushrooms. 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. *Note: fresh mushrooms international trade includes truffles.*

Mushrooms



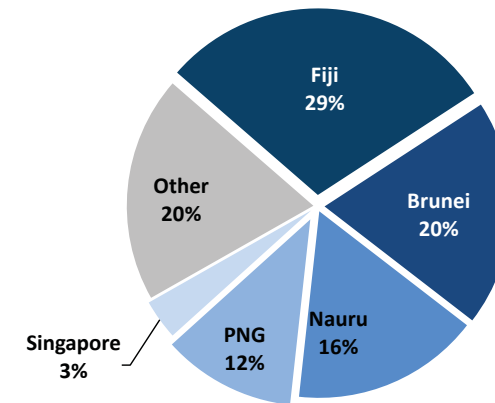
Net Fresh Mushrooms International Trade



Source: GTA

For the year ending June 2020, **29%** of exported fresh mushrooms were sent to Fiji, as profiled in the chart below.

2019/20 Fresh Mushrooms Export by Country



Source: GTA



Fresh Mushrooms 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	1,528	1,713	1,675	Queensland	57	42	36
Victoria	1,340	1,609	1,573	Victoria	17	17	27
Western Australia	262	334	434	Western Australia	8	9	7
Queensland	158	171	187	New South Wales	6	3	2
South Australia	< 0.5	12	4	Tasmania	< 0.5	< 0.5	< 0.5
Other	< 0.5	< 0.5	-	Other	2	< 0.5	1
TOTAL	3,288	3,839	3,874	TOTAL	89	71	72

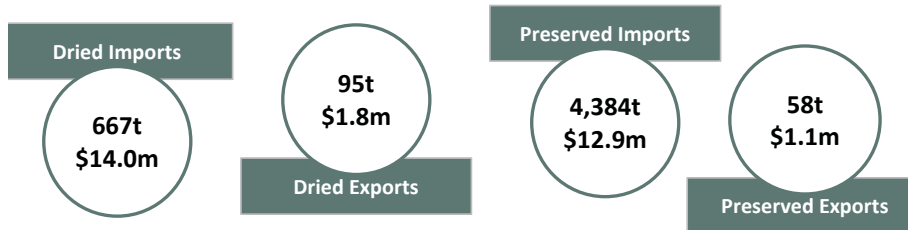
Fresh Mushrooms Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Sth. Korea	2,709	3,160	3,188	Fiji	22	23	21
China	526	574	596	Brunei	14	12	14
Taiwan	16	17	54	Nauru	9	11	12
Italy	2	18	11	PNG	19	9	8
Spain	32	50	10	Singapore	5	1	3
Other	3	20	14	Other	19	17	14
TOTAL	3,288	3,839	3,874	TOTAL	89	71	72

Source: GTA

Processed Mushrooms International Trade

For the year ending June 2020, an additional **4,384 tonnes** of preserved mushrooms and **667 tonnes** of dried mushrooms were imported, while **58 tonnes** of preserved mushrooms and **95 tonnes** of dried mushrooms were exported.



Source: GTA





Fresh Onions Overview

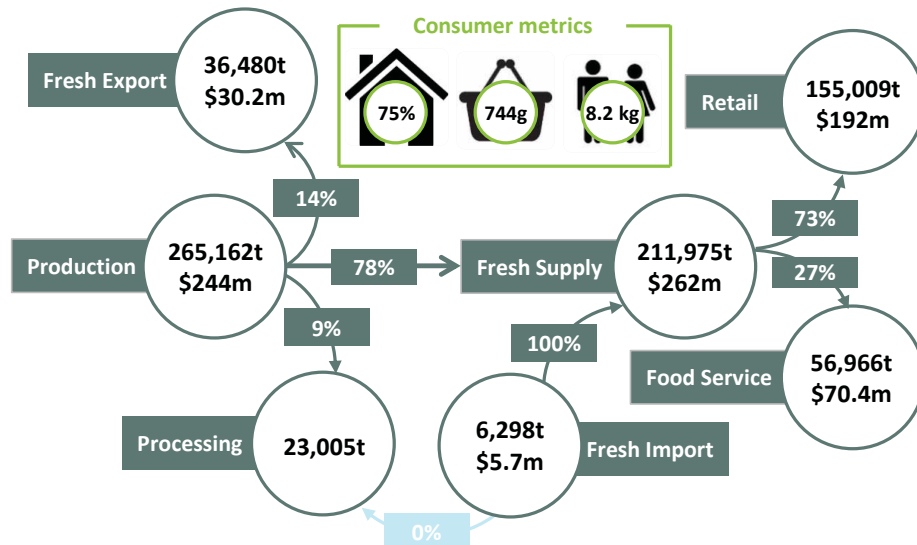
Onions are grown across most states of Australia, with the majority of production occurring in South Australia and Tasmania. Processed onions are typically dried and preserved.



For the year ending June 2020:

- **265,162 t** produced and valued at **\$244 m** with **9%** sent to processing.
- The wholesale value of the fresh supply was **\$262 m**, with **\$192 m** distributed into retail and **\$70.4 m** into food service.
- **75%** of Australian households purchased onions, buying an average of **744 g** of onions per shopping trip.
- The supply per capita was **8.2 kg**, based on the volume supplied.

Fresh Onions Supply Chain—Year Ending June 2020



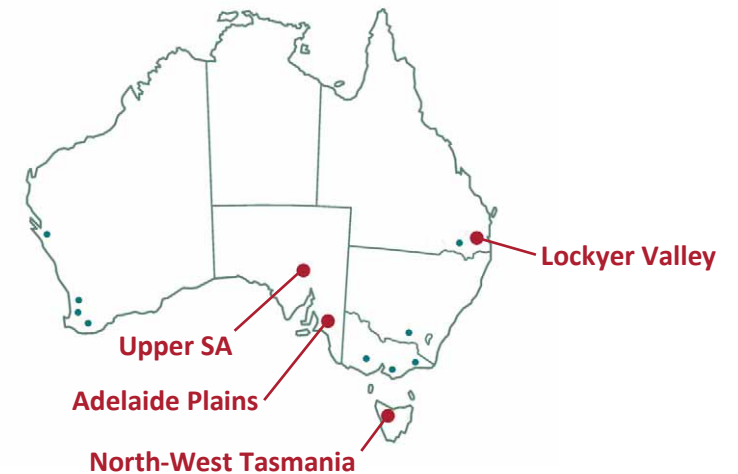
Sources: ABS; AC; CFVIWA; GTA; Onions Australia (OA); MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	249,145	258,194	+4%	265,162	+3%
Production (\$m)	\$ 164.8	\$ 191.2	+16%	\$ 243.9	+28%
Production area (Ha)	5,152	-	-	-	-
Fresh Export Volume (t)	30,514	47,490	+56%	36,480	-23%
Fresh Export Value (\$m)	\$ 21.7	\$ 39.2	+81%	\$ 30.2	-23%
Fresh Import Volume (t)	5,482	4,983	-9%	6,298	+26%
Fresh Import Value (\$m)	\$ 4.6	\$ 4.6	<1%	\$ 5.7	+24%
Fresh Supply (t)	206,731	197,674	-4%	211,975	+7%
Fresh Supply Wholesale Value (\$m)	\$ 175.5	\$ 189.0	+8%	\$ 261.9	+39%
Supply per Capita (kg)	8.29	7.84	-5%	8.22	+5%
Retail Supply (t)	-	140,194	-	155,009	+11%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 134.0	-	\$ 191.5	+43%
Food Service Supply (t)	-	57,480	-	56,966	>-1%
Food Service Wholesale Value (\$m)	\$ -	\$ 55.0	-	\$ 70.4	+28%

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

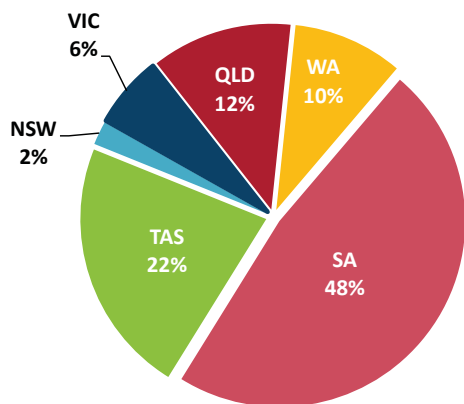
Major Onion Production Areas



Source: OA



2019/20 Fresh Onions Production by State



Source: ABS

Fresh Onions Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,430												
Victoria	16,595												
Queensland	32,461												
Western Australia	25,379												
South Australia	126,238												
Tasmania	59,059												
Availability legend			High		Medium		Low						None

Source: ABS

Main Onion Varieties

There are a number of onion varieties grown in Australia. Some of the major varieties include:

Brown onions accounted for **79%** of fresh production for the year ending June 2020.

Red onions accounted for **19%** of fresh production for the year ending June 2020.

White onions accounted for **1%** of fresh production for the year ending June 2020.

Shallots/Spring onions accounted for **<1%** of fresh production for the year ending June 2020.

Seasonality by Onion Variety

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

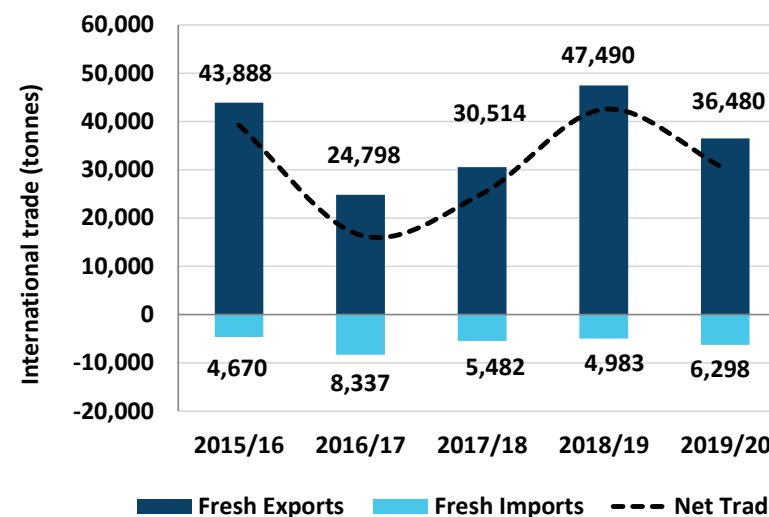
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Brown	192,203												
Red	46,469												
White	2,318												
Shallots/Spring	1,167												
Processing	23,005												
Availability legend			High		Medium		Low						None

Source: OA

Fresh Onion International Trade

Australia is a net exporter of fresh onions. For the year ending June 2020, Australia exported **36,480 tonnes** of fresh onions. 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 Onions International Trade



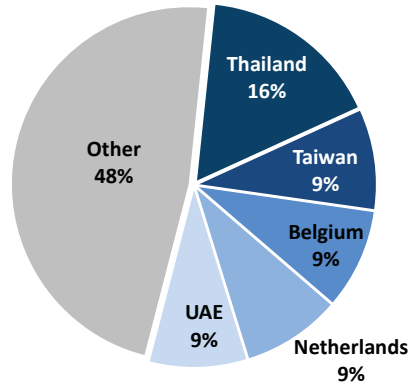
Source: GTA



Onions

For the year ending June 2020, **16%** of exported fresh onions were sent to Thailand, as profiled in the chart below.

2019/20 Fresh Onions Exports by Country



Source: GTA

Fresh Onions 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	2,383	1,960	2,576	Tasmania	13,531	24,081	20,438
New South Wales	2,119	1,616	1,939	South Australia	8,178	10,846	8,635
Western Australia	885	1,248	1,538	Western Australia	7,553	10,169	5,985
Queensland	70	159	245	Queensland	620	1,094	788
Tasmania	25	-	-	Victoria	464	1,065	318
TOTAL	5,482	4,983	6,298	Other	158	223	304
				TOTAL	30,504	47,478	36,468

Fresh Onions 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	3,943	3,917	4,781	Thailand	3,173	7,545	5,976
Netherlands	788	571	556	Taiwan	5,053	5,086	3,285
US	530	489	536	Belgium	1,246	4,377	3,275
New Zealand	186	-	418	Netherlands	1,229	2,010	3,224
Pakistan	6	4	6	UAE	2,978	1,812	3,184
Other	29	2	1	Other	16,617	26,284	17,238
TOTAL	5,482	4,983	6,298	TOTAL	30,296	47,114	36,182

Source: GTA



Onions

Processed Onions International Trade

For the year ending June 2020, an additional **4,154 tonnes** of dried onions and **801 tonnes** of preserved onions were imported, while **275 tonnes** of dried onions were exported.



Source: GTA





Fresh Parsnips Overview

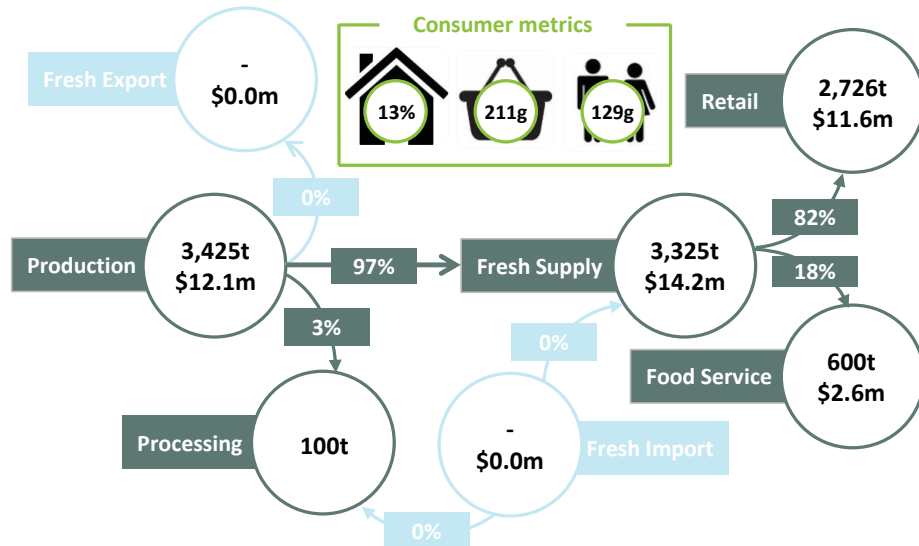
Parsnips are grown across most states of Australia, with the majority of production occurring in Victoria. Almost all of the parsnips grown in Australia are destined for the fresh market.



For the year ending June 2020:

- **3,425 t** produced and valued at **\$12.1 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$14.2 m**, with **\$11.6 m** distributed into retail and **\$2.6 m** into food service.
- **13%** of Australian households purchased parsnips, buying an average of **211 g** of parsnips per shopping trip.
- The supply per capita was **129g**, based on the volume supplied.

Fresh Parsnips Supply Chain—Year Ending June 2020



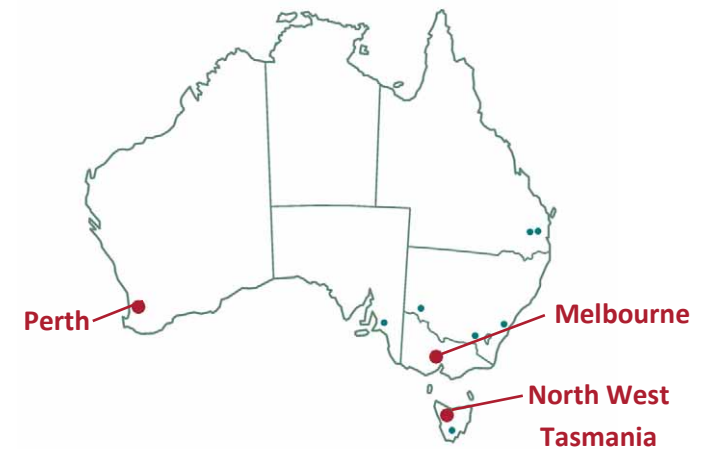
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,368	3,316	-2%	3,425	+3%
Production (\$m)	\$ 11.2	\$ 11.8	+6%	\$ 12.1	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	3,270	3,219	-2%	3,325	+3%
Fresh Supply Wholesale Value (\$m)	\$ 13.1	\$ 13.9	+6%	\$ 14.2	+2%
Supply per Capita (kg)	0.13	0.13	-3%	0.13	<1%
Retail Supply (t)	-	2,565	-	2,726	+6%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 11.1	-	\$ 11.6	+5%
Food Service Supply (t)	-	654	-	600	-8%
Food Service Wholesale Value (\$m)	\$ -	\$ 2.8	-	\$ 2.6	-9%

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

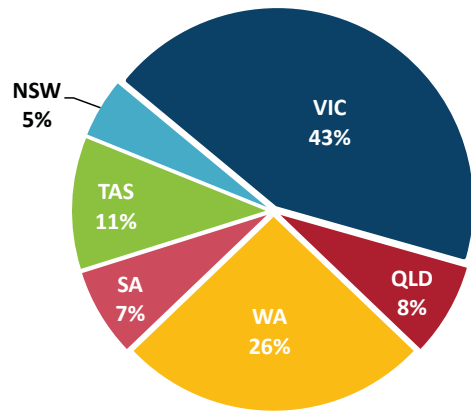
Major Parsnip Production Areas



Source: AUSVEG



2019/20 Fresh Parsnips Production by State



Source: AUSVEG

Fresh Parsnips Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	168	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	1,486	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	265	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	880	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	250	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	375	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low	None								

Source: AUSVEG





Fresh Peas Overview

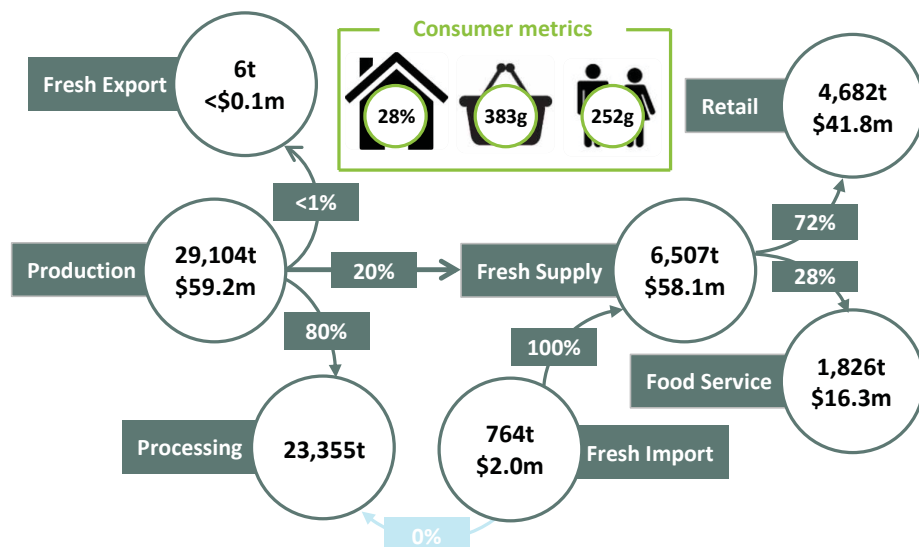
Peas are grown across most states of Australia, with the majority of production occurring in Victoria, Queensland and Tasmania.

For the year ending June 2020:

- **29,104 t** produced and valued at **\$59.2 m** with **80%** sent to processing.
- The wholesale value of the fresh supply was **\$58.1 m**, with **\$51.8 m** distributed into retail and **\$16.3 m** into food service.
- **28%** of Australian households purchased fresh peas, buying an average of **383 g** of peas per shopping trip.
- The supply per capita was **252 g**, based on the volume supplied.



Fresh Peas Supply Chain—Year Ending June 2020



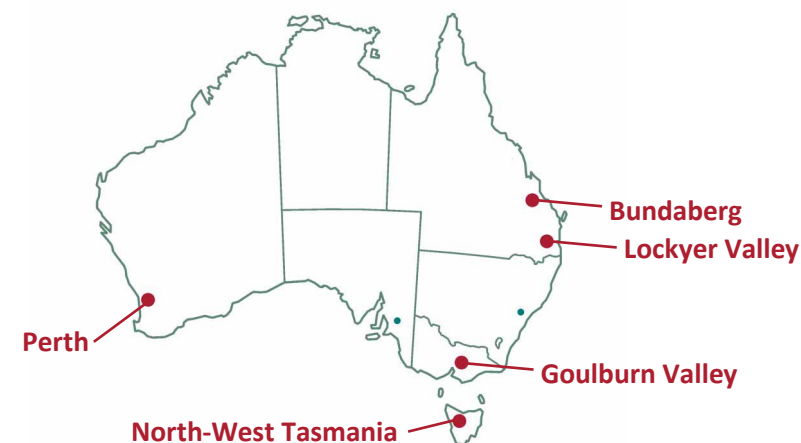
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	32,947	33,275	<1%	29,104	-13%
Production (\$m)	\$ 54.5	\$ 62.7	+15%	\$ 59.2	-6%
Production area (Ha)	4,111	-	-	-	-
Fresh Export Volume (t)	7	10	+56%	6	-46%
Fresh Export Value (\$m)	< \$0.1	\$ 0.1	+74%	< \$0.1	-32%
Fresh Import Volume (t)	925	773	-16%	764	-1%
Fresh Import Value (\$m)	\$ 2.6	\$ 2.1	-18%	\$ 2.0	-5%
Fresh Supply (t)	7,426	7,335	-1%	6,507	-11%
Fresh Supply Wholesale Value (\$m)	\$ 53.8	\$ 60.6	+13%	\$ 58.1	-4%
Supply per Capita (kg)	0.30	0.29	-2%	0.25	-13%
Retail Supply (t)	-	5,129	-	4,682	-9%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 42.4	-	\$ 41.8	-1%
Food Service Supply (t)	-	2,206	-	1,826	-17%
Food Service Wholesale Value (\$m)	\$ -	\$ 18.2	-	\$ 16.3	-11%

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

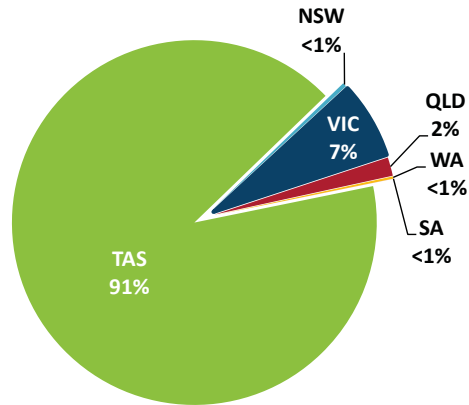
Major Pea Production Areas



Source: AUSVEG



2019/20 Fresh Peas Production by State



Source: AUSVEG

Fresh Pea Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	104	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Victoria	1,980	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Queensland	479	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Western Australia	60	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
South Australia	2	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Tasmania	26,480	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Availability legend		High	Medium	Low	None								

Source: AUSVEG

Main Pea Varieties

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

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

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



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

Seasonality by Pea Variety

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

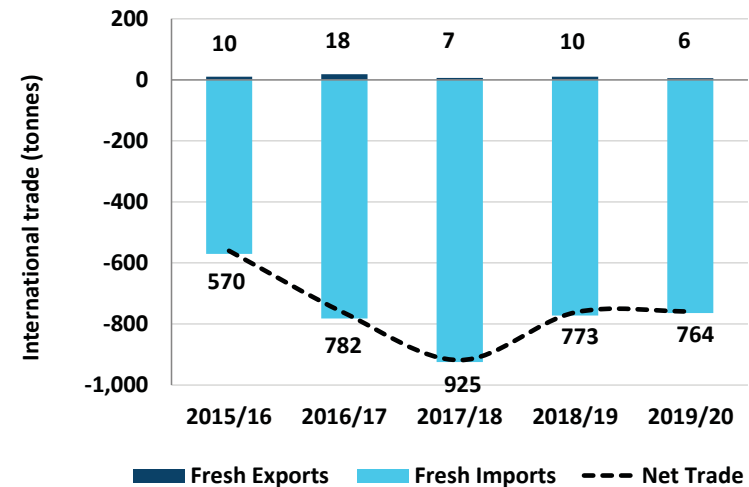
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Snow Peas	4,767	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Sugar Snap	908	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Garden/Processed	23,429	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Availability legend		High	Medium	Low	None								

Source: AUSVEG

Fresh Peas International Trade

Australia is a net importer of fresh peas, with only minimal exports. For the year ending June 2020, Australia imported **764 tonnes** of fresh peas. 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 Peas International Trade

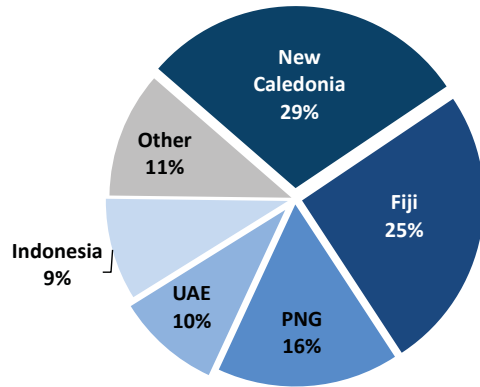


Source: GTA



For the year ending June 2020, **29%** of exported fresh peas were sent to New Caledonia, as profiled in the chart below.

2019/20 Fresh Peas Exports by Country



Source: GTA

Fresh Peas 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
Western Australia	433	508	463	Victoria	4	4	4
New South Wales	351	185	230	Queensland	3	6	2
Victoria	141	78	72	New South Wales	< 0.5	< 0.5	< 0.5
Queensland	-	1	-	Western Australia	-	< 0.5	< 0.5
Other	-	-	-	South Australia	< 0.5	< 0.5	< 0.5
TOTAL	925	773	764	Other	< 0.5	< 0.5	< 0.5
				TOTAL	7	10	6

Fresh Peas Imports and Exports by Country

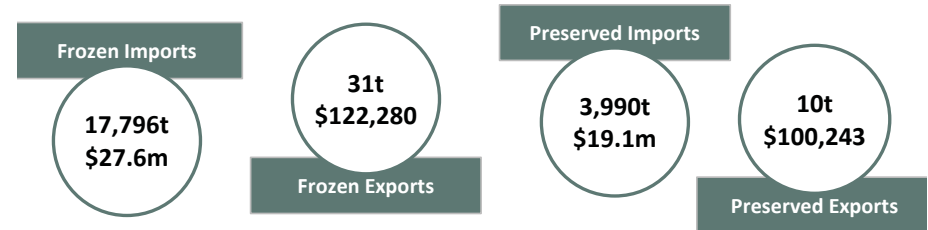
Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2018	2019	2020	Year Ending June	2018	2019	2020
Belgium	278	380	357	New Caledonia	2	2	2
China	483	290	254	Fiji	1	1	1
New Zealand	60	-	86	PNG	2	1	1
US	-	-	46	UAE	< 0.5	< 0.5	1
India	32	55	21	Indonesia	< 0.5	1	1
Other	72	47	< 0.5	Other	3	5	1
TOTAL	925	773	764	TOTAL	7	10	6

Source: GTA



Processed Peas International Trade

For the year ending June 2020, an additional **17,796 tonnes** of frozen peas and **3,990 tonnes** of preserved peas were imported, while **31 tonnes** of frozen peas and **10 tonnes** of preserved peas were exported.



Source: GTA



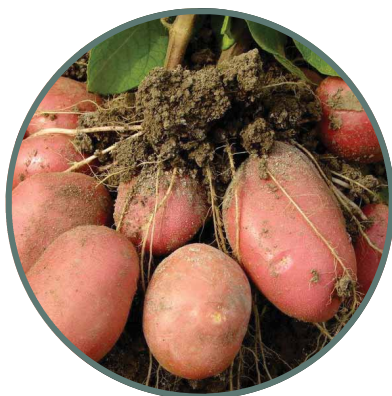


Potatoes Overview

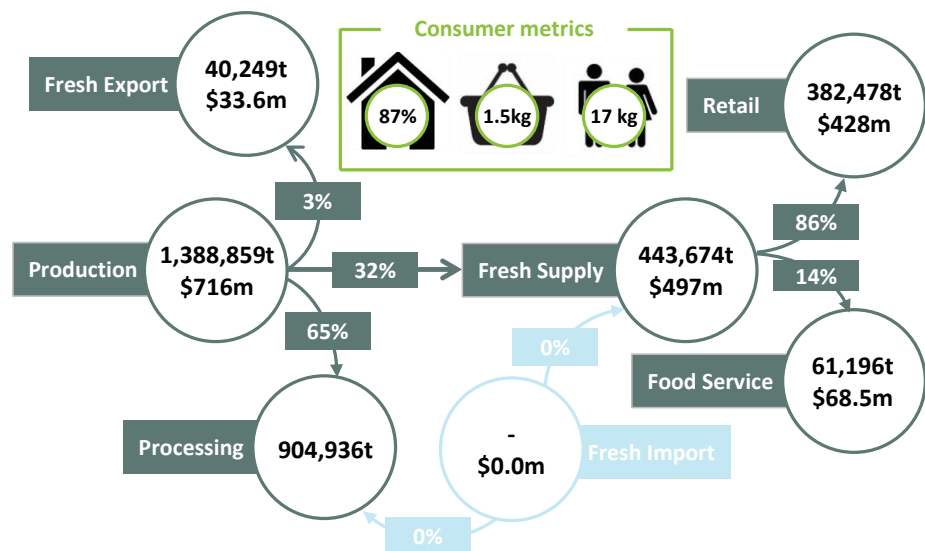
Potatoes are grown across Australia, with the majority of production occurring in South Australia and Tasmania.

For the year ending June 2020:

- **1,388,859 t** produced and valued at **\$716 m** with **65%** or **904,936 t** sent to processing.
- The wholesale value of the fresh supply was **\$497 m**, with **\$428 m** distributed into retail and **\$68.5 m** into food service.
- **87%** of Australian households purchased potatoes, buying an average of **1.5 kg** of potatoes per shopping trip.
- The supply per capita was **17 kg**, based on the volume supplied.



Potatoes Supply Chain—Year Ending June 2020



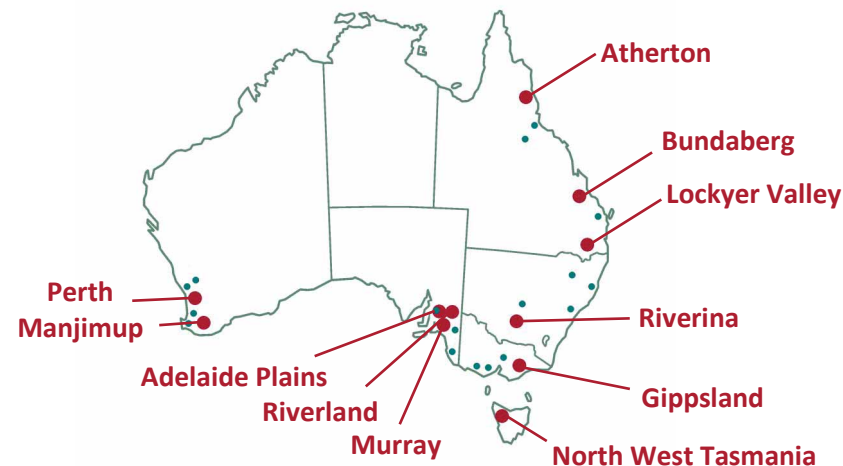
Sources: ABS; AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,388,968	1,380,385	>-1%	1,388,859	<-1%
Production (\$m)	\$ 745.9	\$ 752.6	<-1%	\$ 716.4	-5%
Production area (Ha)	29,740	-	-	-	-
Fresh Export Volume (t)	36,529	45,912	+26%	40,249	-12%
Fresh Export Value (\$m)	\$ 28.0	\$ 30.7	+10%	\$ 33.6	+10%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	441,439	435,058	-1%	443,674	+2%
Fresh Supply Wholesale Value (\$m)	\$ 518.8	\$ 521.7	<-1%	\$ 496.6	-5%
Supply per Capita (kg)	18.01	17.56	-2%	17.50	>-1%
Retail Supply (t)	-	367,138	-	382,478	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 440.2	-	\$ 428.1	-3%
Food Service Supply (t)	-	67,921	-	61,196	-10%
Food Service Wholesale Value (\$m)	\$ -	\$ 81.4	-	\$ 68.5	-16%

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

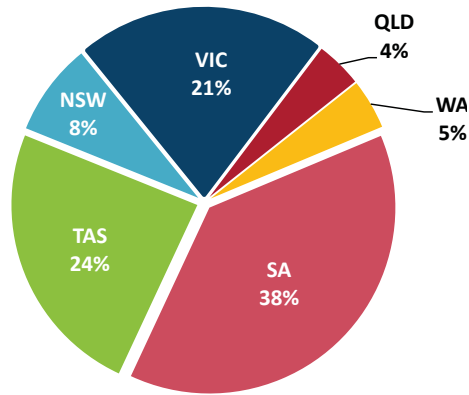
Major Potato Production Areas



Source: AUSVEG



2019/20 Potatoes Production by State



Source: AUSVEG

Potatoes Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	111,870												
Victoria	293,660												
Queensland	55,935												
Western Australia	60,397												
South Australia	531,385												
Tasmania	335,611												
Availability legend			High		Medium		Low						None

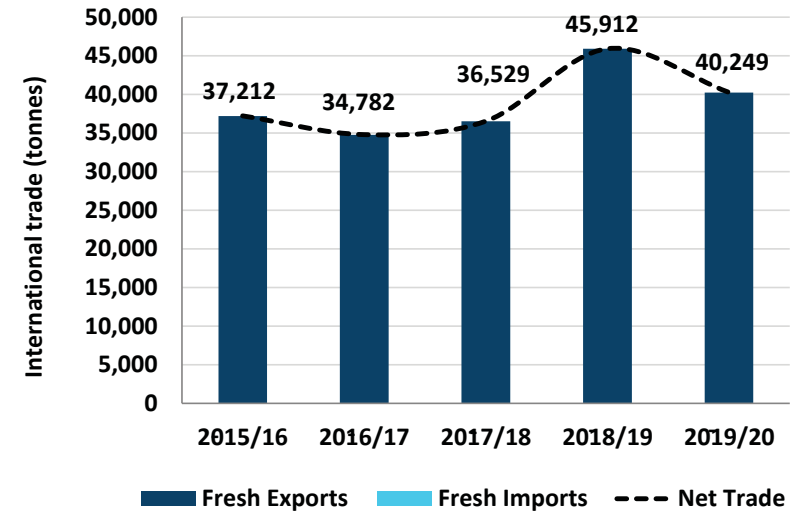
Source: AUSVEG

Fresh Potatoes International Trade

Australia is a net exporter of fresh potatoes. For the year ending June 2020, Australia exported **40,249 tonnes** of fresh potatoes. The exports over the last 5 financial years are profiled in the graph over the page, where imports are counted as negative tonnes.



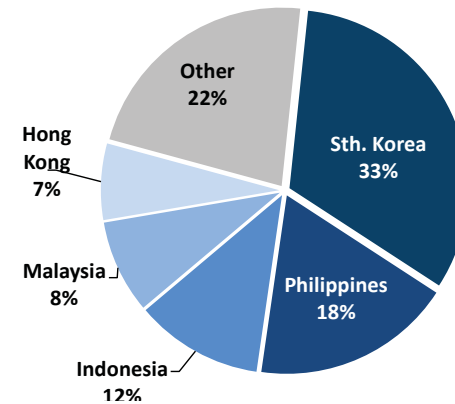
Net Fresh Potatoes International Trade



Source: GTA

For the year ending June 2020, **33%** of exported fresh potatoes were sent to South Korea, as profiled in the chart below.

2019/20 Fresh Potatoes Exports by Country



Source: GTA



Fresh Potatoes Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2018	2019	2020
South Australia	14,984	26,295	23,701
New South Wales	16,435	15,419	10,498
Western Australia	2,615	3,584	5,459
Queensland	336	284	342
Victoria	2,150	329	221
Other	9	1	28
TOTAL	36,529	45,912	40,249

Fresh Potatoes Imports and Exports by Country

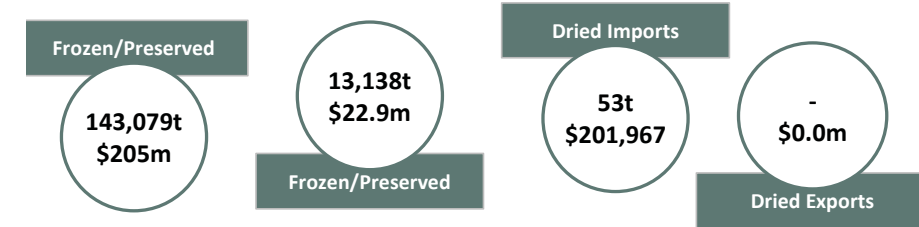
Exports by country (Tonnes)			
Year Ending June	2018	2019	2020
Sth. Korea	19,921	17,663	13,087
Philippines	4,600	4,870	7,288
Indonesia	1,364	1,116	4,656
Malaysia	1,612	2,424	3,405
Hong Kong	1,412	1,816	2,781
Other	7,620	18,023	9,032
TOTAL	36,529	45,912	40,249

Source: GTA



Processed Potatoes International Trade

For the year ending June 2020, an additional **143,079 tonnes** of frozen potatoes and **53 tonnes** of dried potatoes were imported, while **13,138 tonnes** of frozen or preserved potatoes were exported.



Source: GTA





Fresh Pumpkins Overview

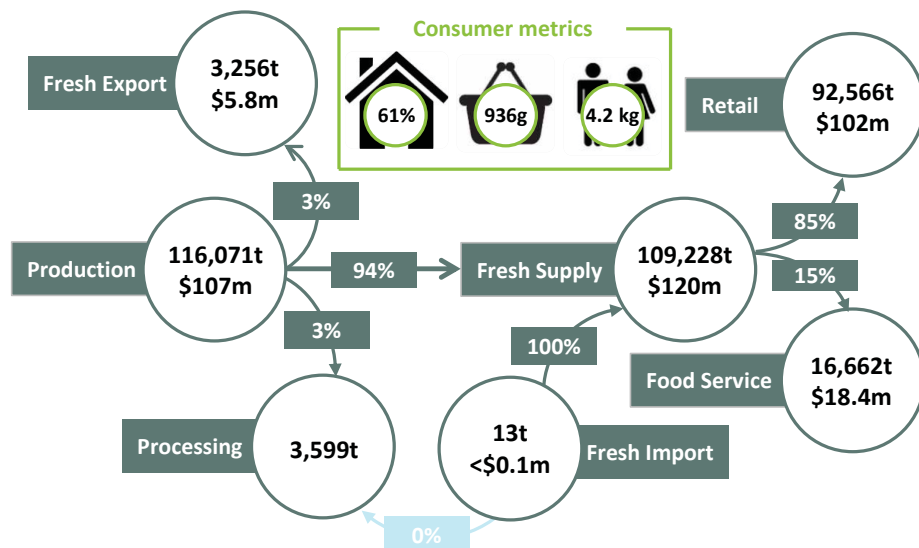
Pumpkins are grown in many states of Australia, with the majority of production occurring in New South Wales and Queensland.

For the year ending June 2020:

- **116,071 t** produced and valued at **\$107 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$120 m**, with **\$102 m** distributed into retail and **\$18.4 m** into food service.
- **61%** of Australian households purchased pumpkins, buying an average of **936 g** of pumpkins per shopping trip.
- The supply per capita was **4.2 kg**, based on the volume supplied.



Fresh Pumpkins Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	119,545	117,791	-1%	116,071	-1%
Production (\$m)	\$ 68.8	\$ 82.0	+19%	\$ 107.5	+31%
Production area (Ha)	4,527	-	-	-	-
Fresh Export Volume (t)	2,074	2,653	+28%	3,256	+23%
Fresh Export Value (\$m)	\$ 3.0	\$ 4.2	+41%	\$ 5.8	+36%
Fresh Import Volume (t)	2	-	-100%	13	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	< \$0.1	-
Fresh Supply (t)	113,767	111,486	-2%	109,228	-2%
Fresh Supply Wholesale Value (\$m)	\$ 77.7	\$ 91.9	+18%	\$ 120.4	+31%
Supply per Capita (kg)	4.56	4.42	-3%	4.23	-4%
Retail Supply (t)	-	89,908	-	92,566	+3%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 74.1	-	\$ 102.0	+38%
Food Service Supply (t)	-	21,578	-	16,662	-23%
Food Service Wholesale Value (\$m)	\$ -	\$ 17.8	-	\$ 18.4	+3%

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

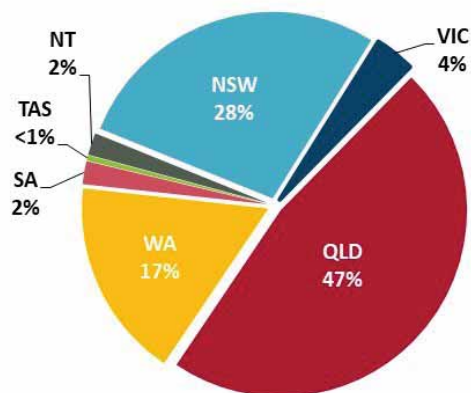
Major Pumpkin Production Areas



Source: AUSVEG



2019/20 Fresh Pumpkin Production by State



Source: ABS

Fresh Pumpkins Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	32,737	High	High	High	High	Medium	Low	None	None	None	None	None	None
Victoria	4,109	High	High	High	High	Medium	Low	None	None	None	None	None	None
Queensland	55,494	High	High	High	High	Medium	Low	None	None	None	None	None	None
Western Australia	20,359	High	High	High	High	Medium	Low	None	None	None	None	None	None
South Australia	2,349	High	High	High	High	Medium	Low	None	None	None	None	None	None
Tasmania	552	High	High	High	High	Medium	Low	None	None	None	None	None	None
Northern Territory	2,268	High	High	High	High	Medium	Low	None	None	None	None	None	None
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

Source: ABS

Main Pumpkin Varieties

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

Kent, also known as Jap pumpkins, an oval pumpkin with mottled green skin. Kent pumpkins accounted for **50%** of fresh production for the year ending June 2020.



Butternut, a long pumpkin with a creamy yellow skin. Butternut pumpkins accounted for **31%** of fresh production for the year ending June 2020.

Queensland blue, also known as Grey pumpkins, a squat pumpkin with a blueish grey skin colour, Queensland blue pumpkins accounted for **17%** of fresh production for the year ending June 2020.

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

Fresh Pumpkins Seasonality by 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
Jap/Kent	57,134	High	High	High	High	Medium	Low	None	None	None	None	None	None
Butternut	35,423	High	High	High	High	Medium	Low	None	None	None	None	None	None
Grey	19,426	High	High	High	High	Medium	Low	None	None	None	None	None	None
Processing	3,599	High	High	High	High	Medium	Low	None	None	None	None	None	None
Other	2,285	High	High	High	High	Medium	Low	None	None	None	None	None	None
Availability legend		High	High	High	High	Medium	Medium	Low	Low	Low	None	None	None

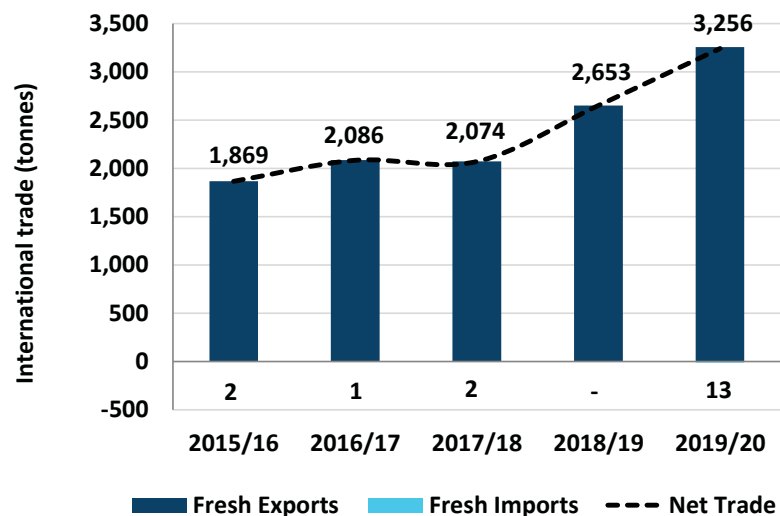
Source: AUSVEG

Fresh Pumpkins International Trade

Australia is a net exporter of fresh pumpkin, with only minimal imports. For the year ending June 2020, Australia exported **3,256 tonnes** of fresh pumpkin. The exports and imports over the last 5 financial years are profiled in the graph over the page, where imports are counted as negative tonnes.



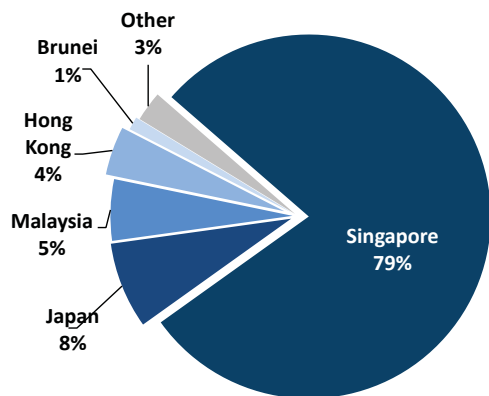
Net Fresh Pumpkins International Trade



Source: GTA

For the year ending June 2020, **79%** of exported fresh pumpkins were sent to Singapore, as profiled in the chart below.

2019/20 Fresh Pumpkins Exports by Country



Source: GTA



Fresh Pumpkins 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	-	13	Queensland	764	823	1,495
Queensland	-	-	< 0.5	Western Australia	267	777	777
Other	-	-	< 0.5	New South Wales	373	352	596
TOTAL	2	-	13	Victoria	553	496	273
				South Australia	116	203	94
				Other	1	1	21
				TOTAL	2,074	2,653	3,256

Fresh Pumpkins 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
Bangladesh	2	-	13	Singapore	1,596	2,106	2,564
India	-	-	< 0.5	Japan	4	58	250
Other	-	-	< 0.5	Malaysia	152	177	177
TOTAL	2	-	13	Hong Kong	110	167	141
				Brunei	10	12	38
				Other	203	132	87
				TOTAL	2,074	2,653	3,256

Source: GTA





Fresh Sweet Corn Overview

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

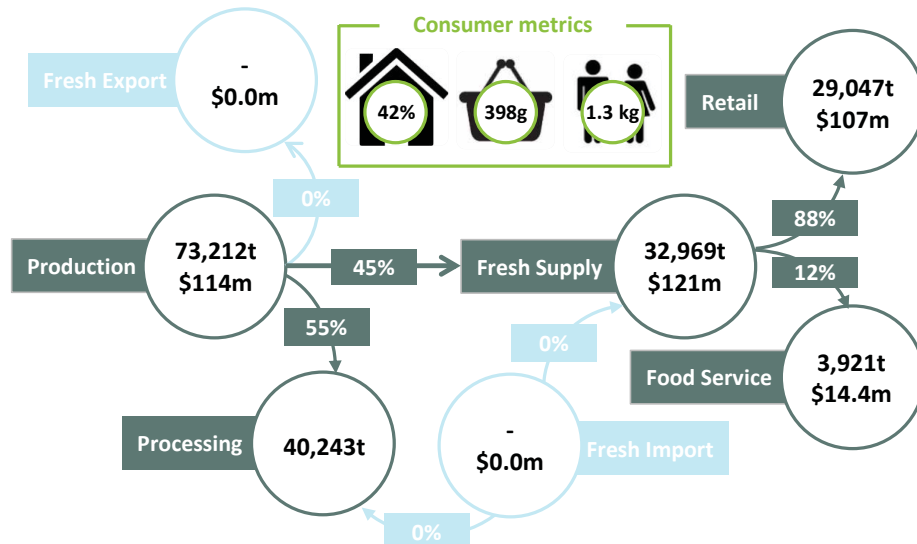
The majority of production occurs in New South Wales and Queensland.

For the year ending June 2020:

- **73,212 t** produced and valued at **\$113.8 m** with **55%** sent to processing.
- The wholesale value of the fresh supply was **\$121 m**, with **\$107 m** distributed into retail and **\$14.4 m** into food service.
- **42%** of Australian households purchased fresh sweet corn, buying an average of **398 g** of sweet corn per shopping trip.
- The supply per capita was **1.3 kg**, based on the volume supplied.



Fresh Sweet Corn Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	62,712	71,794	+14%	73,212	+2%
Production (\$m)	\$ 60.2	\$ 76.9	+28%	\$ 113.8	+48%
Production area (Ha)	9,231	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	28,241	32,330	+14%	32,969	+2%
Fresh Supply Wholesale Value (\$m)	\$ 64.0	\$ 81.7	+28%	\$ 120.9	+48%
Supply per Capita (kg)	1.13	1.28	+13%	1.28	>-1%
Retail Supply (t)	-	27,871	-	29,047	+4%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 70.4	-	\$ 106.5	+51%
Food Service Supply (t)	-	4,459	-	3,921	-12%
Food Service Wholesale Value (\$m)	\$ -	\$ 11.3	-	\$ 14.4	+28%

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

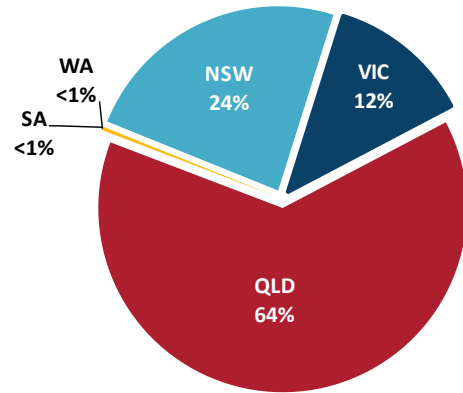
Major Sweet Corn Production Areas



Source: AUSVEG



2019/20 Fresh Sweet Corn Production by State



Sources: ABS

Fresh Sweet Corn Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	17,375												
Victoria	9,114												
Queensland	46,499												
Western Australia	224												
South Australia	1												
Availability legend			High		Medium		Low						None

Sources: AUSVEG





Fresh Sweetpotatoes Overview

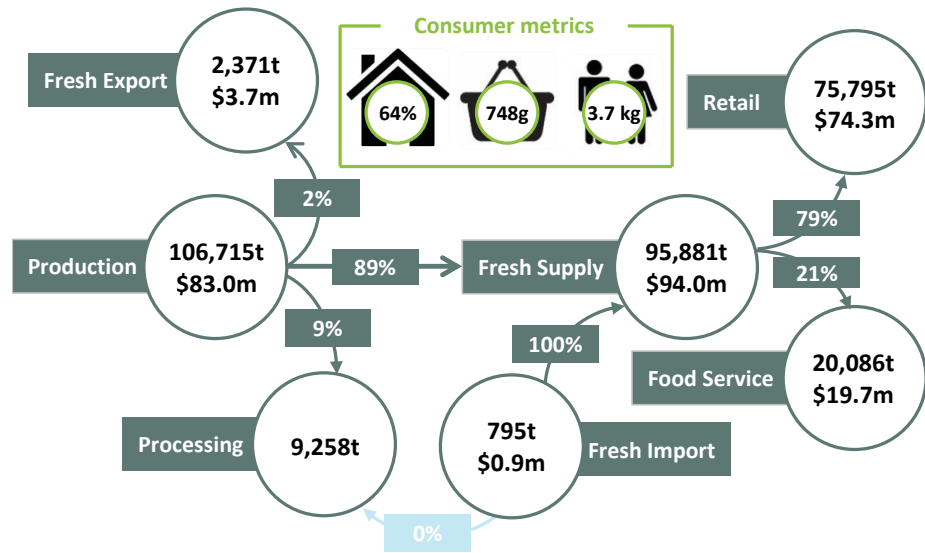
The majority of sweetpotatoes grown in Australia are produced in Queensland, with smaller volumes grown in Western Australia, northern New South Wales and the Northern Territory.



For the year ending June 2020:

- **106,715 t** produced and valued at **\$83.0 m** with **9%** sent to processing.
- The wholesale value of the fresh supply was **\$94 m**, with **\$74.3 m** distributed into retail and **\$19.7 m** into food service.
- **64%** of Australian households purchased sweetpotatoes, buying an average of **748 g** of sweetpotatoes per shopping trip.
- The supply per capita was **3.7 kg**, based on the volume supplied.

Fresh Sweetpotatoes Supply Chain—Year Ending June 2020



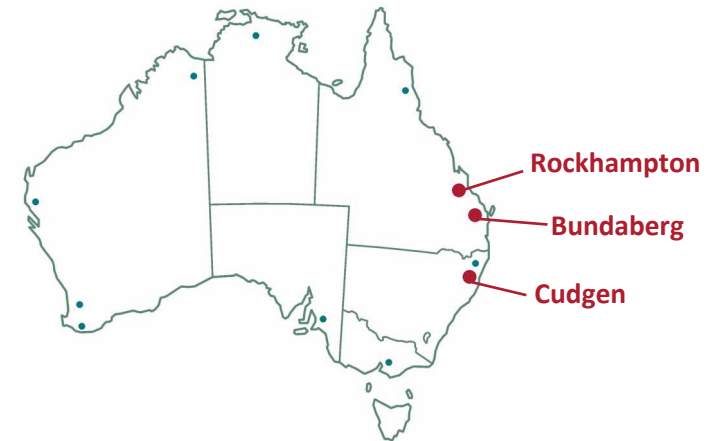
Sources: AC; Australian Sweet Potato Growers Association (ASPGA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	97,222	101,198	+4%	106,715	+5%
Production (\$m)	\$ 73.8	\$ 72.3	-2%	\$ 83.0	+15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	921	1,479	+61%	2,371	+60%
Fresh Export Value (\$m)	\$ 1.6	\$ 2.4	+46%	\$ 3.7	+55%
Fresh Import Volume (t)	349	640	+83%	795	+24%
Fresh Import Value (\$m)	\$ 0.4	\$ 0.9	>100%	\$ 0.9	+4%
Fresh Supply (t)	92,911	96,466	+4%	95,881	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 85.2	\$ 83.0	-3%	\$ 94.0	+13%
Supply per Capita (kg)	3.73	3.83	+3%	3.72	-3%
Retail Supply (t)	-	72,531	-	75,795	+5%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 62.4	-	\$ 74.3	+19%
Food Service Supply (t)	-	23,935	-	20,086	-16%
Food Service Wholesale Value (\$m)	\$ -	\$ 20.6	-	\$ 19.7	-4%

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

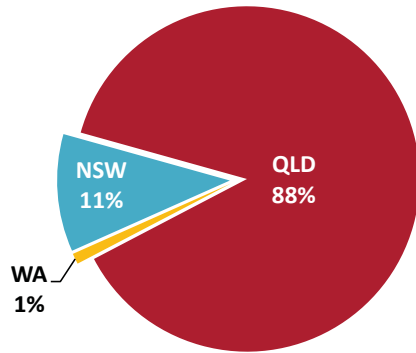
Major Sweetpotato Production Areas



Source: ASPGA



2019/20 Fresh Sweetpotatoes Production by State



Source: ASPGA

Fresh Sweetpotatoes Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	11,739												
Queensland	93,910												
Western Australia	1,067												
Availability legend			High		Medium		Low						None

Source: ASPGA

Main Sweetpotato Varieties

There are three main sweet potato varieties grown in Australia for the fresh market. These varieties include:

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

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

Purple sweetpotatoes, has white skin, with white and purple flesh. Purple sweet potatoes accounted for **3%** of fresh production.



Seasonality by Sweetpotato variety

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

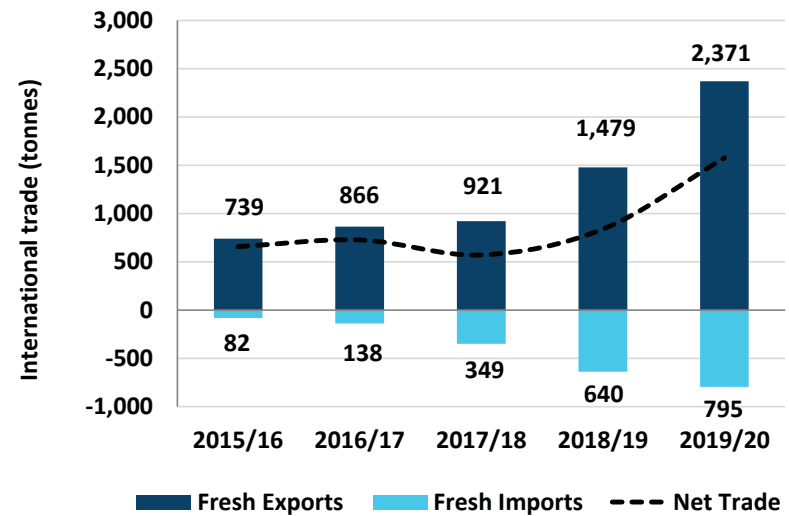
Variety	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Gold	96,044												
Red	7,470												
Purple	3,201												
Availability legend			High		Medium		Low						None

Source: ASPGA

Fresh Sweetpotato International Trade

Australia is a net exporter of fresh sweetpotatoes, with smaller amounts of imports. For the year ending June 2020, Australia exported **2,371 tonnes** of fresh sweetpotatoes. The exports and imports over the last 5 financial years are profiled in the graph below page, where imports are counted as negative tonnes.

Net Fresh Sweetpotatoes International Trade

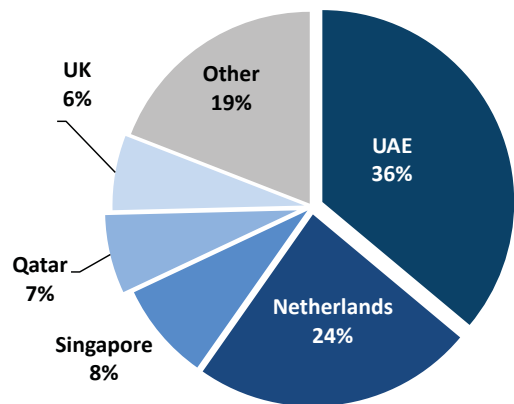


Source: GTA



For the year ending June 2020, **36%** of exported fresh sweetpotatoes were sent to the United Arab Emirates (UAE), as profiled in the chart below.

2019/20 Fresh Sweetpotatoes Exports by Country



Source: GTA

Fresh Sweetpotatoes 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	266	530	697	Queensland	697	1,297	2,122
New South Wales	79	105	86	New South Wales	104	115	196
Victoria	5	5	12	Victoria	116	85	72
Western Australia	-	-	1	Western Australia	-	5	10
Other	-	-	< 0.5	South Australia	4	4	< 0.5
TOTAL	349	640	795	Other	-	3	< 0.5
				TOTAL	922	1,509	2,401

Fresh Sweetpotatoes 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	276	555	722	UAE	528	966	866
Tonga	69	82	71	Netherlands	-	70	568
Sth. Korea	3	2	1	Singapore	141	150	198
Taiwan	-	-	1	Qatar	35	101	159
Hong Kong	1	1	-	UK	-	-	151
Other	-	-	< 0.5	Other	218	223	458
TOTAL	349	640	795	TOTAL	922	1,509	2,401

Source: GTA





Tomatoes Overview

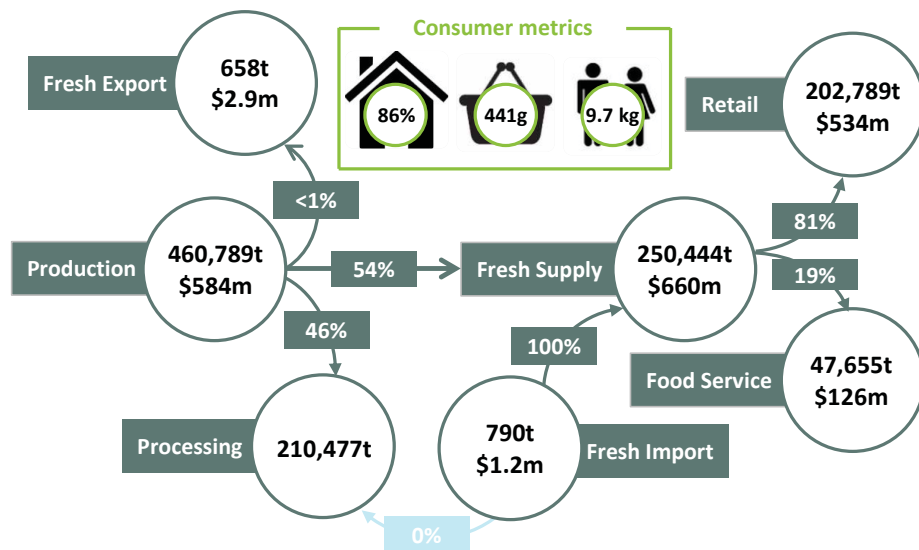
Tomatoes are grown in most states of Australia, with the majority of production occurring in Victoria and Queensland. Traditionally most tomatoes were produced outdoors in Queensland. In recent years, more tomatoes have been grown in high-tech glasshouses.



For the year ending June 2020:

- **460,789 t** was produced with **46%** sent to processing.
- The value of production was **\$584 m** while the wholesale value of the fresh supply was **\$660 m**.
- **86%** of Australian households purchased fresh tomatoes, buying an average of **441 g** of tomatoes per shopping trip.
- The supply per capita was **9.7 kg**, based on the volume supplied.

Tomatoes Supply Chain—Year Ending June 2020



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



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	484,073	469,199	-3%	460,789	-2%
Production (\$m)	\$ 609.9	\$ 674.2	+11%	\$ 584.4	-13%
Production area (Ha)	4,781	-	-	-	-
Fresh Export Volume (t)	804	1,000	+24%	658	-34%
Fresh Export Value (\$m)	\$ 3.0	\$ 3.7	+22%	\$ 2.9	-22%
Fresh Import Volume (t)	926	899	-3%	790	-12%
Fresh Import Value (\$m)	\$ 1.8	\$ 2.0	+13%	\$ 1.2	-43%
Fresh Supply (t)	256,559	250,807	-2%	250,444	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 687.7	\$ 760.5	+11%	\$ 660.1	-13%
Supply per Capita (kg)	10.29	9.95	-3%	9.71	-2%
Retail Supply (t)	-	200,646	-	202,789	+1%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 608.4	-	\$ 534.5	-12%
Food Service Supply (t)	-	50,161	-	47,655	-5%
Food Service Wholesale Value (\$m)	\$ -	\$ 152.1	-	\$ 125.6	-17%

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

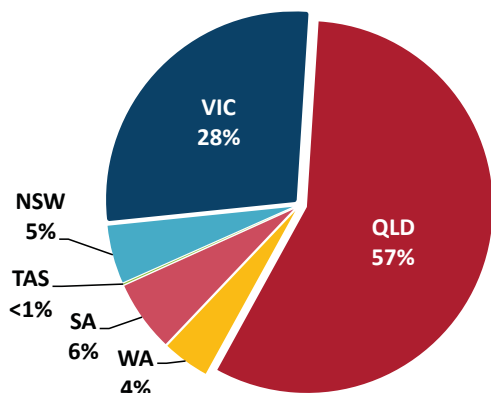
Major Tomato Production Areas



Source: AUSVEG



2019/20 Fresh Tomatoes Production by State



Source: AUSVEG

Fresh Tomatoes Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	23,240	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	127,305	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	262,650	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	18,790	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	28,360	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	444	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low	None								

Source: AUSVEG

Main Tomato Types

There are number of tomato types grown in Australia, with these types grouping a number of varieties. These major types include:

Field, a round to oval tomato with a red skin, these varieties are most commonly grown outdoors. Field tomatoes accounted for **40%** of fresh production for the year ending June 2020.



Large Truss, a round to oval tomato with a red skin and typically sold with the vine still attached. Large truss tomatoes are most commonly grown in glasshouses, and accounted for **30%** of fresh production for the year ending June 2020.

Cherry and Grape, smaller round to oval shaped tomatoes with a red skin, these varieties are grown both outdoors or more commonly in glasshouses. These types accounted for **24%** of fresh production for the year ending June 2020.

Roma, including baby roma tomatoes, an oval egg-shaped tomato with red skin. These varieties accounted for **6%** of fresh production for the year ending June 2020.

Fresh Tomato Seasonality by Type

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

Type	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Field	100,125	High	High	High	High	High	High	High	High	High	High	High	High
Large Truss	75,094	High	High	High	High	High	High	High	High	High	High	High	High
Cherry/Grape	60,075	High	High	High	High	High	High	High	High	High	High	High	High
Roma	15,019	High	High	High	High	High	High	High	High	High	High	High	High
Processing	210,477	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	Medium	Low	None								

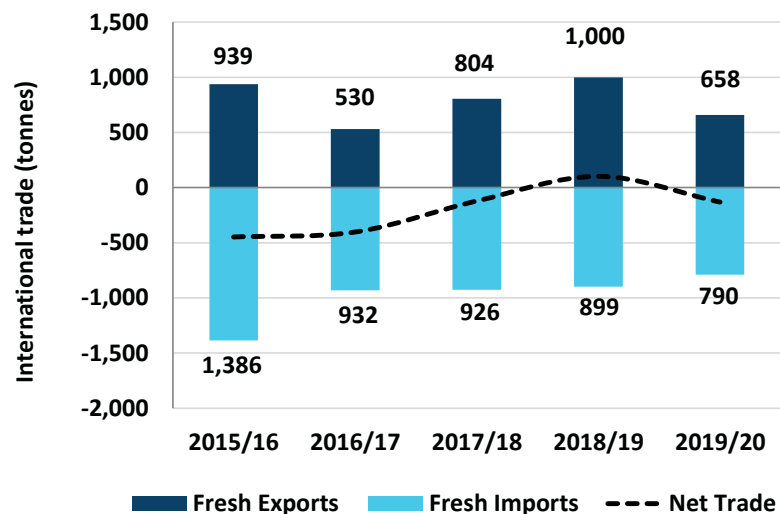
Source: APTRC; AUSVEG; (Freshlogic Analysis)

Fresh Tomato International Trade

Australia has traditionally been a net importer of fresh tomatoes. For the year ending June 2020, Australia exported **658 tonnes** of fresh tomatoes. The exports and imports over the last 5 financial years are profiled in the graph over the page, where imports are counted as negative tonnes.



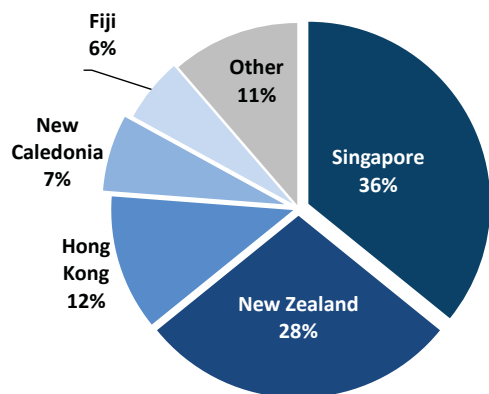
Net Fresh Tomatoes International Trade



Source: GTA

For the year ending June 2020, **36%** of exported fresh tomatoes were sent to Singapore, as profiled in the chart below.

2019/20 Fresh Tomatoes Exports by Country



Source: GTA



Fresh Tomatoes 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	215	358	362	Queensland	561	733	359
New South Wales	307	370	317	New South Wales	173	213	196
Victoria	404	171	111	Victoria	53	39	90
Western Australia				Western Australia	16	14	11
South Australia				South Australia	2	1	< 0.5
TOTAL	926	899	790	Other	-	< 0.5	< 0.5
				TOTAL	804	1,000	658

Fresh Tomatoes 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	926	899	790	Singapore	219	224	236
TOTAL	926	899	790	New Zealand	239	498	186
				Hong Kong	46	100	79
				New Caledonia	81	60	45
				Fiji	29	16	37
				Other	191	102	74
				TOTAL	804	1,000	658

Source: GTA





Fresh Zucchini Overview

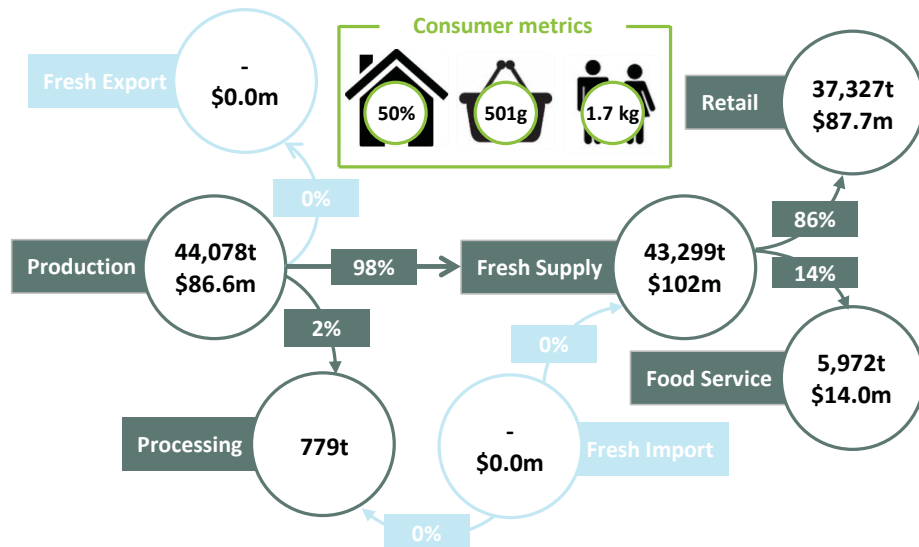
Zucchini is grown in most states of Australia, with the majority of production occurring in Queensland and Victoria.

For the year ending June 2020:

- **44,078 t** produced and valued at **86.6 m** with **2%** sent to processing.
- The wholesale value of the fresh supply was **\$102 m**, with **\$87.7 m** distributed into retail and **\$14 m** into food service.
- **50%** of Australian households purchased zucchini, buying an average of **501 g** of zucchini per shopping trip.
- The supply per capita was **1.7 kg**, based on the volume supplied.



Fresh Zucchini Supply Chain—Year Ending June 2020



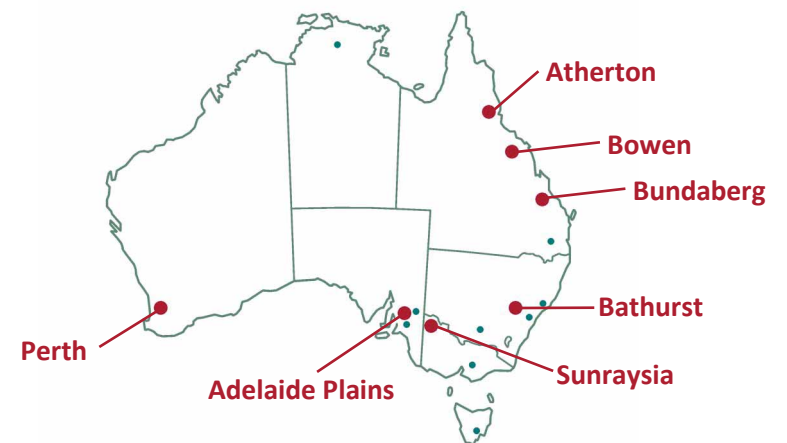
Sources: AC; AUSVEG; CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2018	2019		2020	
	Value	Value	% YoY	Value	% YoY
Production (t)	40,063	43,670	+9%	44,078	<1%
Production (\$m)	\$ 72.0	\$ 92.3	+28%	\$ 86.6	-6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	39,355	42,898	+9%	43,299	<1%
Fresh Supply Wholesale Value (\$m)	\$ 84.6	\$ 108.4	+28%	\$ 101.7	-6%
Supply per Capita (kg)	1.58	1.70	+8%	1.68	-1%
Retail Supply (t)	-	35,162	-	37,327	+6%
Retail Supply Wholesale Value (\$m)	\$ -	\$ 88.8	-	\$ 87.7	-1%
Food Service Supply (t)	-	7,736	-	5,972	-23%
Food Service Wholesale Value (\$m)	\$ -	\$ 19.5	-	\$ 14.0	-28%

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

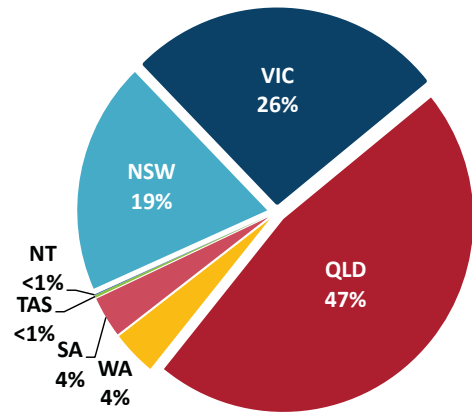
Major Zucchini Production Areas



Source: AUSVEG



2019/20 Fresh Zucchini Production by State



Source: AUSVEG

Fresh Zucchini Seasonality by State

State	19/20 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,550	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	11,645	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	20,571	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	1,665	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	1,525	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	98	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	24	High	High	High	High	High	High	High	High	High	High	High	High
Availability legend		High	High	Medium	Medium	Low	Low	None	None	None	None	None	None

Source: AUSVEG

