



# **Australian Horticulture Statistics Handbook 2018/19**

## **VEGETABLES**

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Communications Manager  
Horticulture Innovation Australia Limited  
Level 7, 141 Walker Street  
Sydney NSW 2000  
Australia  
Email: [communications@horticulture.com.au](mailto:communications@horticulture.com.au)  
Phone: 02 8295 2300

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This Handbook is an analysis that combines all available data on production, international trade, processing volumes and fresh market distribution in order to produce statistics on 75 horticultural categories over the year ending 30 June 2019.

### Summary of Approach

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

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

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

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

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

This publication covers the year ending 30 June 2019 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 reflected fuller supply of selected fruit and berry crops as expanded plantings matured. A prolonged period of summer heat made it difficult for southern state vegetable production and increased the pressure on the all crops dependent on irrigation water. In these conditions the wholesale value per kg of fresh fruit and vegetables supplied to the local market increased by 7% to \$2.59 per kg.

The domestic food market reflects the signals of a mature market at full supply where signals of supply pressure lead to pricing responses.

Total fresh horticulture exports were valued at **\$2.64 billion** in 2018/19, 27% higher than the previous year. The increase in export value was driven predominately by Almonds & Table Grapes

The export market success of recent years has created firmer priorities that business growth is now enabled by access to these export markets.

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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 2019 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 2017/18 edition for a category, this has been noted on the page of the relevant category.

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

The 2018/19 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
2018/19	Year ending 30 June 2019
ABS	Australian Bureau of Statistics
CIF	Cost of Insurance and Freight (a measure of import value)
FOB	Free On Board (a measure of export value)
g	Grams
GTA	Global Trade Atlas
kg	Kilograms
KWE	Kernel Weight Equivalent
ha	Hectares
ISWE	In-Shell Weight Equivalent
L	Litres
m <sup>2</sup>	Metres squared (a measure of area)
m m <sup>2</sup>	Million metres squared (a measure of area)
ML	Mega Litres (1 million litres)
N/A	Not Available
t	Tonnes (1 thousand kilograms)

### States

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

### Countries

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

## Definitions

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

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

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

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

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

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

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

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

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

**Wholesale Value**—The value in million dollars of the fresh supply at a wholesale market level, inclusive of net international trade flows. Wholesale values have been *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 is 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 2019 according to the ABS. The number of occupied households is assumed at 9.06 million and the population at 25.2 million for the 2018/19 year\*.

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

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

Throughout the document when data sources have been relied upon, this has been noted. Some of the more common sources have been abbreviated. The full list of sources has been provided on pages 20 and 21.

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

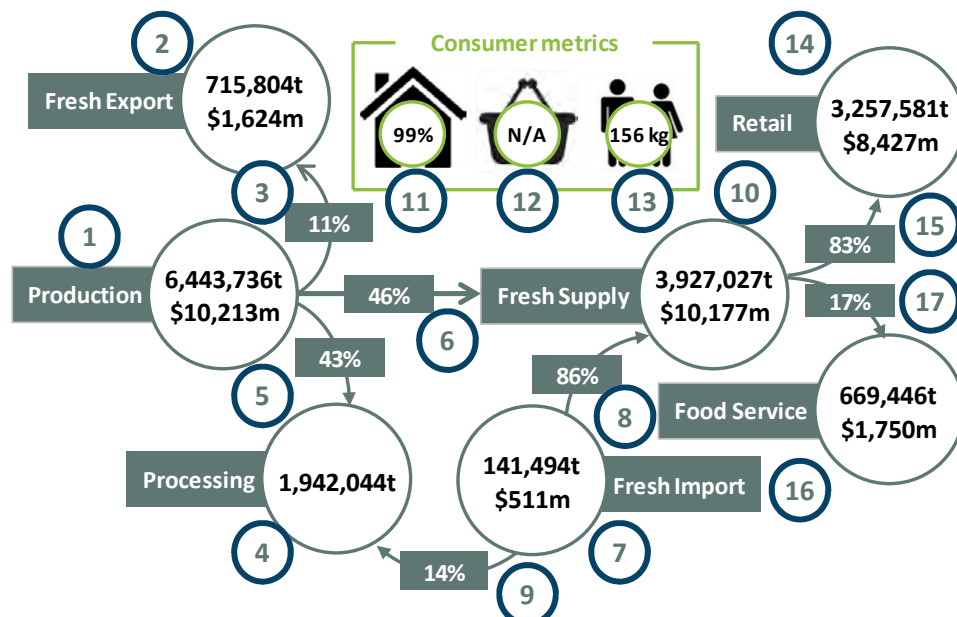
\*\*ABS, Agricultural Commodities cat. no. 7121.0



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 2019. It contains the following elements:

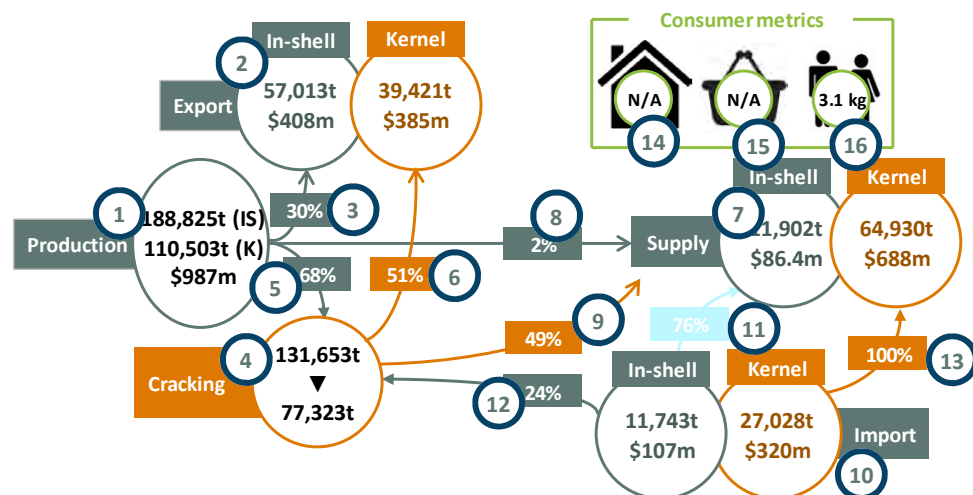


1. **Production.** This is the volume of the category grown in Australia over the year ending June 2019. This profiles the **Production** (volume in tonnes), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**, sometimes known as the farm gate value.
2. **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 2019. '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 2019. 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 2019. Because nuts are sold both in an **In-Shell** and **Kernel** format, the nut supply chain profiles both elements, indicated by **green** for **In-Shell** and **orange** for **Kernel**. The chain contains the following elements:



- 1. Production.** This is the volume of the category grown in Australia over the year ending June 2019. This profiles the **Production** (volume in tonnes), in both **In-Shell** (written in **green** and denoted by **IS**) and the **Kernel** equivalent of this volume after cracking (written in **orange** and denoted by **K**), as well as the value in million dollars obtained by the producers i.e. the **Value of Production**.
- 2. Exports.** The volume in tonnes of the production that was exported, and the value in million dollars received. This profiles both **In-Shell** exports and **Kernel** exports.
- 3. In-Shell Export Share.** The percentage share of **In-Shell** production that was exported.
- 4. Cracking.** The volume in tonnes of the **In-Shell** production and imported **In-Shell** product that was sent to be cracked so as to produce kernel. This profiles both the **In-Shell** volume in, and the **Kernel** volume out.
- 5. Cracking Share.** The percentage share of **In-Shell** production that was cracked.

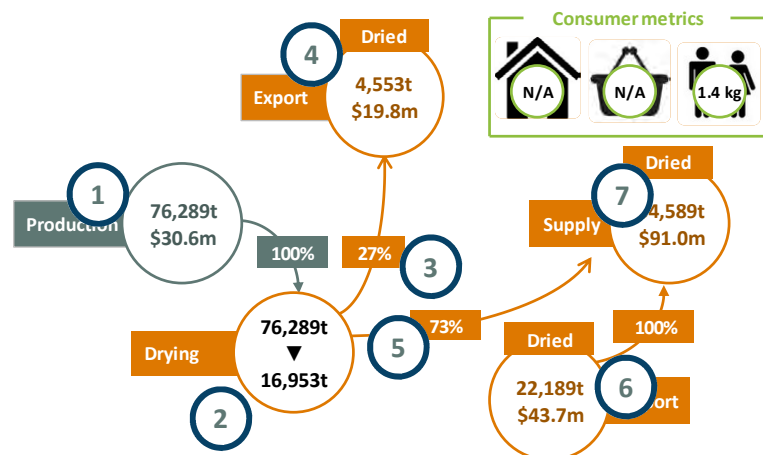
- 6. Kernel Export Share.** The percentage share of cracked **Kernel** that was exported.
- 7. Supply.** This is the volume of the category available to the Australian market. It includes both Production that was sold into the market, as well as Imports that were sold into the market. This profiles the **Supply** (volume in tonnes), and the **Wholesale Value** in million dollars, which is the value of the Supply at a wholesale market level. It covers both **In-Shell** and **Kernel** supply.
- 8. In-Shell Supply Share.** The volume in tonnes of the **In-Shell** Production that was supplied to the market.
- 9. Kernel Supply Share.** The volume in tonnes of cracked **Kernel** that was supplied to the market.
- 10. Imports.** The volume in tonnes of the category that was imported from another country, and the value in million dollars paid to import. Profiles both **In-Shell** and **Kernel** imports.
- 11. In-Shell Import Supply Share.** The percentage share of **In-Shell** imports that was sent to the Australian market.
- 12. In-Shell Import Cracking Share.** The percentage share of **In-Shell** imports that was sent to be cracked.
- 13. Kernel Import Supply Share.** The percentage share of **Kernel** imports that was sent to the Australian market.
- 14. Household Penetration.** The percentage of Australian households who bought the category at least once at retail, to be consumed either in or out of the home, over the year ending June 2019. See page 15 for full definition.
- 15. Average Purchase Quantity.** The average quantity purchased at retail per shopping trip by Australian households over the year ending June 2019. A shopping trip refers to a trip where this category is purchased.
- 16. Fresh Supply per capita.** The volume of fresh supply available to the Australian population.

*Note: Supply into retail and food service are not reported for Nuts & Olives.*

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

## Processed supply chain—Dried/Canned Fruit

This example supply chain outlines the flow of the three dried/canned fruit categories over the year ending June 2019. It contains the following elements:



- 1. Production.** The volume of the category grown in Australia over the year ending June 2019. 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 2017, June 2018 and June 2019), as well as the percentage change in value year on year. They contain:

Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	318,198	330,652	+4%	332,598	<1%
Production (\$m)	\$ 231.3	\$ 215.7	-7%	\$ 219.3	+2%
Production area (Ha)	5,785	5,628	-3%	-	-
Fresh Export Volume (t)	102,937	108,172	+5%	110,213	+2%
Fresh Export Value (\$m)	\$ 90.8	\$ 94.6	+4%	\$ 96.6	+2%
Fresh Import Volume (t)	10	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	195,710	202,153	+3%	201,939	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 179.8	\$ 157.8	-12%	\$ 160.0	+1%
Supply per Capita (kg)	7.98	8.11	+2%	8.01	-1%

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



## Common Data Sources

<u>Abbreviation</u>	<u>Data Source</u>	<u>Further information</u>
<b>ABS</b>	Agricultural Commodities, Australian Bureau of Statistics	Information from <i>Agricultural Commodities cat. no. 7121.0, 2017-18, 2016-17, 2015-16, 2014-15 and 2013-14 editions has been compiled.</i> <i>Australian Demographic Statistics cat. no. 3101.0 June 2019 edition.</i> <i>2016 Census of Population and Housing</i>
<b>AC</b>	Ausmarket Consultants	Wholesale pricing information from the Adelaide, Brisbane, Melbourne and Sydney wholesale markets.
<b>CFVIWA</b>	Chamber of Fruit and Vegetable Industries of Western Australia	Wholesale pricing information from the Perth wholesale market.
<b>Freshlogic Analysis</b>	THRUChain analysis— Freshlogic	Supply chain modelling system that aligns the volumes of production and international trade with the volumes distributed through processing and all domestic market channels.
<b>GTA</b>	IHS —Global Trade Atlas®	<a href="http://www.gtis.com/gta">www.gtis.com/gta</a>

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

## Data sharing-List of projects

### List of projects

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

<u>Project Code</u>	<u>Project Title</u>
<b>AL16003</b> (Almonds)	<i>Australian Almond Industry Statistics</i>
<b>AP16002</b> (Apple/Pear)	<i>Apple and Pear Crop Estimates</i>
<b>AP16006</b> (Avocado)	<i>June 2019 Infocado Report</i>
<b>BA16009</b>	<i>Banana Enterprise Comparison 2016/17</i>
<b>CT18002</b> (Citrus)	<i>Citrus Market Development; Market Access and Quality Program</i>
<b>CU15002</b> (Custard Apples)	<i>Custard Apple Dispatch System 2</i>
<b>MC15009</b> (Macadamias)	<i>Macadamia Crop Forecasting 2015 - 2018</i>
<b>MG17000</b> (Mangoes)	<i>Building best management practice capacity for the Australian mango industry</i>
<b>MT15031</b> (Dried Grapes)	<i>Australian Dried Fruit Communications Program</i>
<b>NY17008</b> (Nursery)	<i>Nursery industry statistics and research 2017/18</i>
<b>OL16001</b> (Olives)	<i>Australian Olive Industry Benchmarking Program</i>

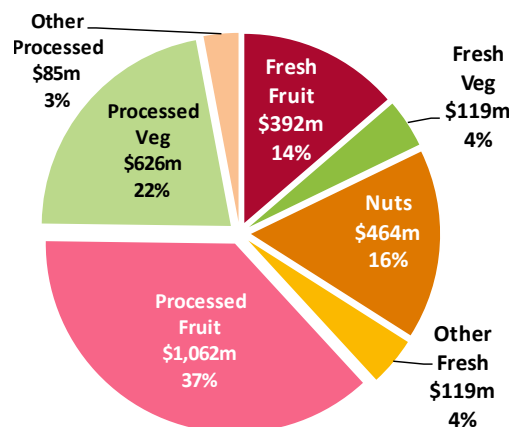
## Data sharing-List of projects

<u>Project Code</u>	<u>Project Title</u>
<b>PI17001</b> (Pineapples)	<i>Study groups enabling industry adaption to pineapple market changes</i>
<b>TU17005</b> (Turf)	<i>Turf industry statistics 2017-18 to 2019-2020</i>
<b>TM17000</b> (Tomatoes)	<i>Tomato Industry Capacity Building</i>
<b>VG15077</b> (Vegetables)	<i>Financial Performance of Australian Vegetable Farms 2016-2017 to 2018-2019</i>



## Total Imports

For the year ending June 2019, Australia imported **\$2.87 billion** worth of horticultural products. *The values below do not include wine grapes.* Processed fruit was the largest value import grouping. The value of imports by group is profiled in the chart and table below. The table below also includes the **top 3** import categories by value within each group. The value for nuts includes some processed nut products.



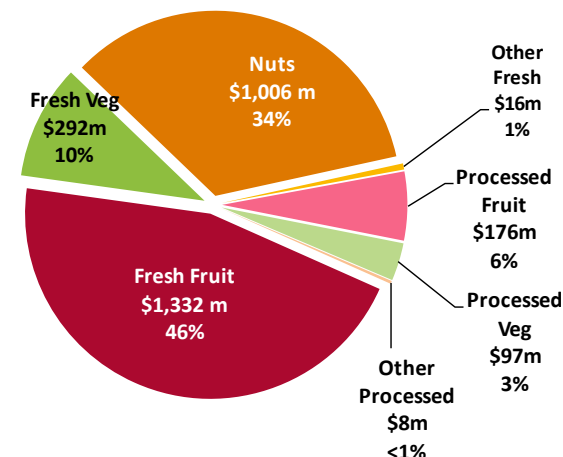
Sources: GTA; (Freshlogic Analysis)

<b>Fresh Fruit</b> .....	<b>\$392.2m</b>	<b>Other Fresh Horticulture</b> .....	<b>\$119.2m</b>
Grapes .....	\$81.3m	Cut Flowers .....	\$77.3m
Avocados .....	\$73.3m	Bulbs .....	\$20.9m
Kiwifruit .....	\$60.3m	Live Plants .....	\$20.9m
<b>Fresh Vegetables</b> .....	<b>\$118.9m</b>	<b>Processed Fruit</b> .....	<b>\$1,062.2m</b>
Garlic .....	\$28.3m	Olives and Olive Oil .....	\$254.9m
Asparagus .....	\$25.0m	Orange Juice .....	\$55.1m
Mushrooms .....	\$13.2m	Dried Tree Fruits .....	\$44.1m
<b>Nuts</b> .....	<b>\$467.4m</b>	<b>Processed Vegetables</b> .....	<b>\$625.8m</b>
Cashews .....	\$172.6m	Potatoes .....	\$203.2m
Almonds .....	\$42.8m	Tomatoes .....	\$128.1m
Walnuts .....	\$37.4m	Beans .....	\$63.7m



## Total Exports

For the year ending June 2019, Australia exported **\$2.92 billion** worth of horticultural products. Fresh fruit was the largest value export grouping. The value of exports by group is profiled in the chart and table below. The table below also includes the top 3 export categories within each group. *These values do not include wine grapes.*



Sources: GTA; (Freshlogic Analysis)

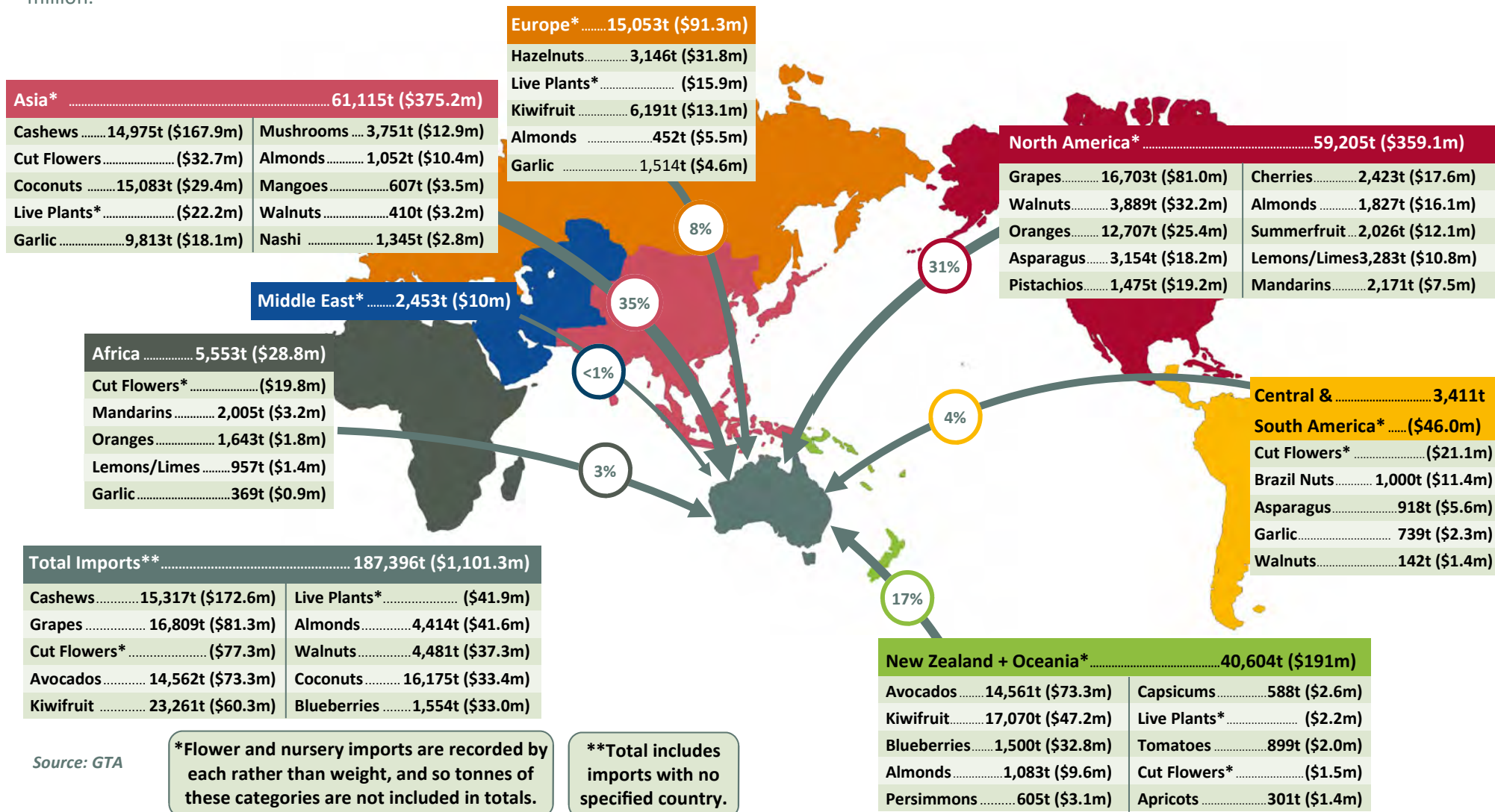
<b>Fresh Fruit</b> .....	<b>\$1,332.0m</b>	<b>Other Fresh Horticulture</b> .....	<b>\$15.6m</b>
Table Grapes .....	\$555.2m	Cut Flowers .....	\$10.1m
Oranges .....	\$308.1m	Live Plants .....	\$5.2m
Mandarins .....	\$139.4m	Bulbs .....	\$0.3m
<b>Fresh Vegetables</b> .....	<b>\$292.2m</b>	<b>Processed Fruit</b> .....	<b>\$175.6m</b>
Carrots .....	\$96.6m	Dried Grapes and Grape Juice .....	\$42.9m
Onions .....	\$39.2m	Dried Mangoes .....	\$30.7m
Potatoes .....	\$30.7m	Olives and Olive Oil .....	\$16.6m
<b>Nuts</b> .....	<b>\$1,005.9m</b>	<b>Processed Vegetables</b> .....	<b>\$96.7m</b>
Almonds .....	\$675.0m	Potatoes .....	\$18.5m
Macadamias .....	\$257.2m	Tomatoes .....	\$16.1m
Walnuts .....	\$17.9m	Ginger .....	\$5.5m





## Imports of fresh horticultural products by region

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



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



## Exports of fresh horticultural products by region

These pages profile total exports of **fresh** horticultural products by 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 *		661,849t (\$2,113.2)
Grapes.....	138,524t (\$527.2m)	Cherries ..... 4,567t (\$74.8m)
Almonds.....	64,990t (\$505.7m)	Summerfruit 10,374t (\$45.8m)
Oranges.....	164,680t (\$274.3m)	Carrots..... 37,590t (\$33.1m)
Macadamias..	18,909t (\$223.4m)	Asparagus..... 3,771t (\$29.6m)
Mandarins.....	44,121t (\$109.8m)	Potatoes..... 35,709t (\$26.7m)

Middle East .....		117,097 (\$189.5m)
Carrots.....	69,395t (\$60.5m)	Mangoes..... 2,349t (\$8.5m)
Almonds.....	1,436t (\$12.4m)	Macadamias..... 276t (\$7.8m)
Grapes.....	3,188t (\$11.18m)	Oranges..... 7,475t (\$7.8m)
Mandarins.....	5,871t (\$10.1m)	Peaches..... 2,471t (\$7.1m)
Watermelons.....	4,891t (\$9.4m)	Nectarines..... 2,357t (\$6.6m)

Africa .....	3,289t (\$11.5m)
Almonds.....	991t (\$7.4m)

Total Exports** .....		837,605t (\$2,736.6m)
Almonds.....	86,451t (\$675.0m)	Carrots..... 110,213t (\$96.6m)
Grapes.....	146,093t (\$555.2m)	Cherries..... 5,035t (\$79.5m)
Macadamias....	22,653t (\$326.1m)	Onions..... 47,478t (\$39.2m)
Oranges.....	188,056t (\$308.1m)	Nectarines..... 9,119t (\$35.0m)
Mandarins.....	59,471t (\$139.4m)	Mangoes..... 8,221t (\$30.7m)

Source: GTA

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

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



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

Europe .....		38,521t (\$205.9m)
Almonds.....	19,008t (\$144.4m)	Apples..... 1,262t (\$2.6m)
Macadamias.....	1,263t (\$34.7m)	Kiwifruit ..... 421t (\$1.0m)
Onions.....	16,873t (\$15.1m)	
Walnuts.....	2,766t (\$14.0m)	
Mushrooms.....	5t (\$3.1m)	

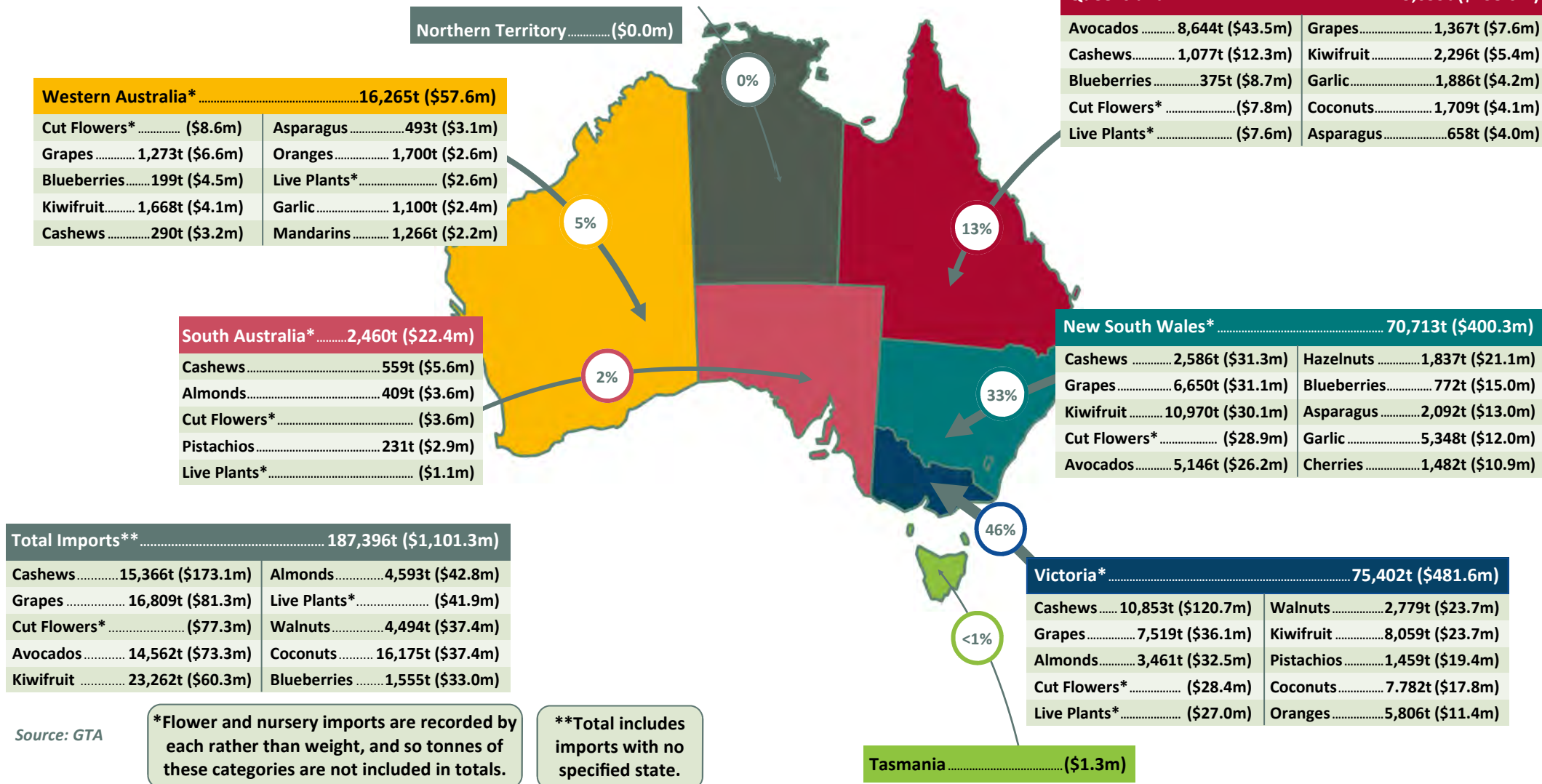
North America*		21,858t (\$113.1m)
Macadamias	2,089t (\$57.9m)	Cherries..... 103t (\$1.6m)
Oranges.....	9,506t (\$17.1m)	Mushrooms..... 2t (\$1.6m)
Mandarins..	5,194t (\$11.3m)	Lemons/Limes..... 801t (\$1.4m)
Almonds.....	1,426t (\$5.9m)	Peaches..... 216t (\$1.3m)
Pears.....	1,472t (\$4.6m)	Mangoes..... 242t (\$1.2m)

New Zealand + Oceania.....		41,288t (\$118.4m)
Almonds.....	2,202t (\$21.5m)	Pears..... 4,119t (\$5.8m)
Grapes.....	4,377t (\$16.8m)	Muskmelons .... 3,226t (\$5.4m)
Oranges.....	6,262t (\$8.5m)	Mangoes..... 1,180t (\$3.9m)
Mandarins.....	4,079t (\$7.7m)	Strawberries..... 560t (\$3.8m)
Beans.....	1,699t (\$7.0m)	Watermelons.... 2,356t (\$3.2m)



## Imports of fresh horticultural products by state

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



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





## Exports of fresh horticultural products by state

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

<b>Northern Territory</b> 1,766t (\$6.5m)
Mangoes ..... 1,300t (\$5.5m)

<b>Western Australia</b> ..... 134,017t (\$173.7m)
Carrots ..... 98,508t (\$84.6m)
Strawberries ..... 2,835t (\$19.7m)
Grapes ..... 1,246t (\$9.1m)
Onions ..... 10,169t (\$8.5m)
Mushrooms ..... 9t (\$6.4m)
Muskmelons ..... 3,357t (\$5.5m)
Avocados ..... 793t (\$4.6m)
Potatoes ..... 3,584t (\$4.5m)
Celery ..... 2,678t (\$3.4m)
Oranges ..... 1,730t (\$2.9m)

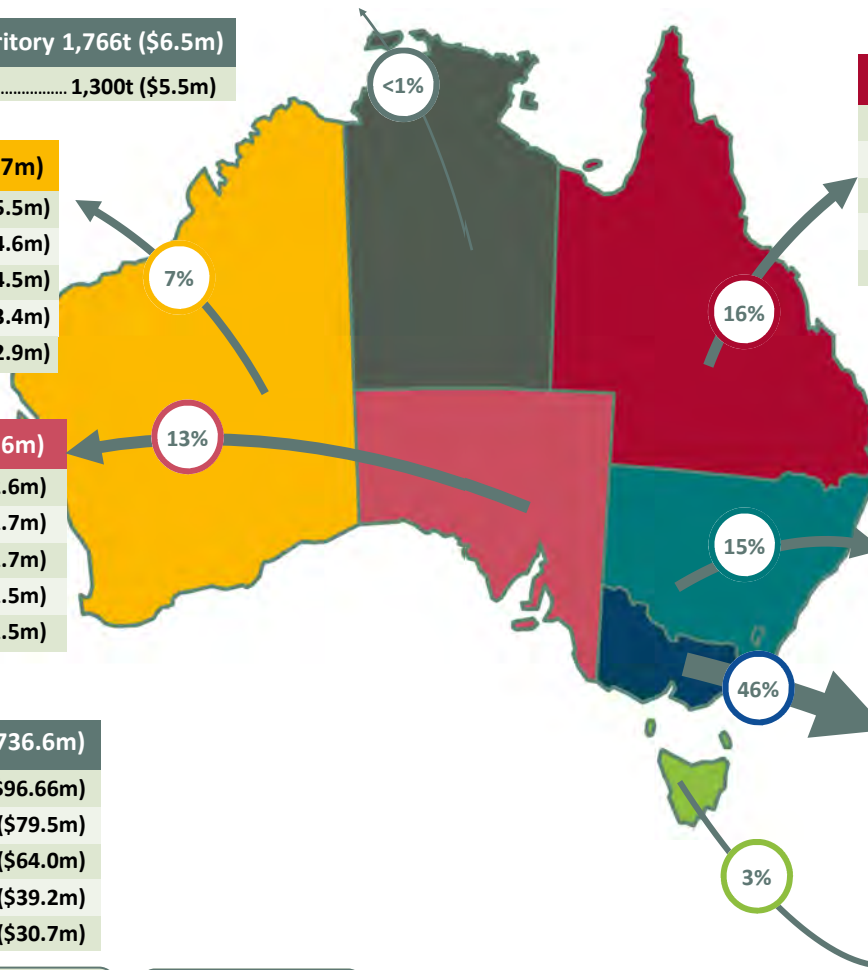
<b>South Australia</b> ..... 136,663t (\$316.6m)
Almonds ..... 17,054t (\$147.6m)
Oranges ..... 60,347t (\$99.3m)
Mandarins ..... 16,956t (\$30.5m)
Potatoes ..... 26,295t (\$16.1m)
Onions ..... 10,846t (\$9.0m)
Lemons/Limes ..... 1,251t (\$2.6m)
Peaches ..... 304t (\$1.7m)
Nectarines ..... 341t (\$1.7m)
Grapes ..... 362t (\$1.5m)
Grapefruit ..... 851t (\$1.5m)

<b>Total Exports**</b> ..... 837,605t (\$2,736.6m)
Almonds ..... 86,451t (\$675.0m)
Grapes ..... 146,093t (\$555.196m)
Macadamias ..... 22,653t (\$326.1m)
Oranges ..... 188,056t (\$308.1m)
Mandarins ..... 59,471t (\$139.4m)
Carrots ..... 110,213t (\$96.66m)
Cherries ..... 5,035t (\$79.5m)
Summerfruit* ..... 5,402t (\$64.0m)
Onions ..... 47,478t (\$39.2m)
Mangoes ..... 8,221t (\$30.7m)

Source: GTA

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

\*\*Total includes exports with no specified 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.

<b>Queensland</b> ..... 89,423t (\$353.1m)
Macadamias ..... 10,316t (\$122.3m)
Mandarins ..... 36,820t (\$96.0m)
Mangoes ..... 5,755t (\$20.7m)
Muskmelons ..... 7,399t (\$12.4m)
Avocados ..... 1,643t (\$10.0m)
Broccoli/Cauli ..... 3,669t (\$9.8m)
Watermelons ..... 5,160t (\$8.1m)
Beans ..... 1,708t (\$7.0m)
Cut Flowers* ..... (\$3.9m)
Live Plants* ..... (\$3.8m)

<b>New South Wales*</b> ..... 94,361t (\$409.5m)
Macadamias ..... 12,194t (\$201.0m)
Oranges ..... 34,787t (\$59.1m)
Grapes ..... 11,328t (\$40.0m)
Walnuts ..... 3,352t (\$17.5m)
Cherries ..... 1,050t (\$11.8m)
Almonds ..... 1,401t (\$11.0m)
Potatoes ..... 15,419t (\$8.7m)
Plums ..... 1,506t (\$5.6m)
Muskmelons ..... 2,972t (\$5.5m)
Pecans ..... 434t (\$4.0m)

<b>Victoria*</b> ..... 347,745t (\$1,409.7m)
Almonds ..... 67,791t (\$512.9m)
Grapes ..... 132,920t (\$503.535m)
Oranges ..... 89,138t (\$143.2m)
Summerfruit ..... 14,095t (\$54.6m)
Cherries ..... 1,986t (\$30.8m)
Asparagus ..... 3,747t (\$29.3m)
Plums ..... 4,359t (\$16.2m)
Pistachios ..... 1,193t (\$15.2m)
Pears ..... 8,592t (\$15.1m)
Mandarins ..... 4,377t (\$9.4m)

<b>Tasmania</b> ..... 33,243t (\$64.5m)
Cherries ..... 1,896t (\$35.8m)
Onions ..... 24,081t (\$19.5m)
Carrots ..... 6,709t (\$6.2m)



## 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 2019.

Year Ending June 2019	Production (t)	Year Ending June 2019	Production (t)
All Horticultural Products	6,731,638	Passionfruit	4,469
<b>All Fruit</b>	<b>2,793,432</b>	Papaya/Pawpaw	14,921
Apples	310,875	Persimmons	2,600
Avocados	85,546	Pears	114,496
Bananas	372,204	Pineapples	70,538
Berries - Combined	105,090	Summerfruit - Combined	161,044
Blueberries	19,008	Apricots	9,027
Rubus Berries	9,478	Nectarines/Peaches	119,775
Strawberries	76,604	Plums	32,241
Cherries	20,148	Table Grapes	208,276
Citrus - Combined	744,374	Processing Fruit Combined*	259,167
Grapefruit	11,132	Dried Grapes	68,616
Lemons/Limes	48,232	Prunes*	6,983
Mandarins	156,914	Other Dried Tree Fruit*	1,722
Oranges	528,095	Canned Fruit*	56,845
Custard Apples	1,836	Olives	125,000
Kiwifruit	7,134	Other Fruit	6,138
Lychees	2,733	<b>All Vegetables</b>	<b>3,722,378</b>
Mangoes	74,920	Artichokes	449
Melons - Combined	291,089	Asparagus	10,237
Muskmelons	61,280	Beans	38,012
Watermelons	229,809	Beetroot	14,262
Nashi	1,384	Broccoli/Baby Broccoli	75,957

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 2019	Production (t)	Year Ending June 2019	Production (t)
Brussels Sprouts	5,733	Potatoes	1,380,385
Cabbage	77,422	Pumpkins	117,790
Capsicums	77,030	Sweet Corn	71,794
Carrots	332,598	Sweetpotatoes	101,196
Cauliflower	75,647	Tomatoes	469,199
Celery	61,245	Zucchini	43,671
Chillies	2,255	Other Vegetables	24,797
Cucumbers	93,768	<b>All Nuts</b>	<b>215,828</b>
Eggplant	9,509	Almonds (Inshell)**	148,571
Eng.Spinach/Silverbeet/Kale	7,061	Chestnuts (Inshell)	1,050
Fresh Herbs - Combined	11,749	Hazelnuts (Inshell)**	1,000
Fennel	1,449	Macadamias (Inshell)	42,900
Parsley and Other Herbs	10,301	Pecans (Inshell)	3,100
Garlic	2,812	Pistachios (Inshell)	1,850
Ginger	6,992	Walnuts (Inshell)	12,300
Leafy Asian Vegetables	29,229	Other Nuts (Inshell)	5,057
Leafy Salad Vegetables	67,039	<b>Other Horticulture</b>	<b>N/A</b>
Leeks	10,809	Cut Flowers	N/A
Head Lettuce	136,937	<i>Nursery</i>	<i>N/A</i>
Mushrooms	72,007	Turf	N/A
Onions	258,195		
Parsnips	3,315		
Peas	33,278		

*\*\*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 2019.

Year Ending June 2019	Production (\$m)	Year Ending June 2019	Production (\$m)
All Horticultural Products	\$14,366.9	Passionfruit	\$19.4
<b>All Fruit</b>	<b>\$5,525.3</b>	Papaya/Pawpaw	\$27.5
Apples	\$512.8	Persimmons	\$9.6
Avocados	\$444.0	Pears	\$115.4
Bananas	\$594.6	Pineapples	\$49.7
Berries - Combined	\$938.6	Summerfruit - Combined	\$461.0
Blueberries	\$338.7	Apricots	\$35.1
Rubus Berries	\$207.5	Nectarines/Peaches	\$350.3
Strawberries	\$392.4	Plums	\$75.7
Cherries	\$189.3	Table Grapes	\$693.2
Citrus - Combined	\$829.3	Processing Fruit Combined*	\$210.4
Grapefruit	\$16.1	Dried Grapes	\$29.2
Lemons/Limes	\$115.7	Prunes*	\$6.3
Mandarins	\$298.6	Other Dried Tree Fruit*	\$0.6
Oranges	\$398.8	Canned Fruit*	\$19.3
Custard Apples	\$6.9	Olives	\$155.0
Kiwifruit	\$19.0	Other Fruit	\$12.1
Lychees	\$34.4	<b>All Vegetables</b>	<b>\$4,722.1</b>
Mangoes	\$198.6	Artichokes	\$0.9
Melons - Combined	\$181.4	Asparagus	\$86.6
Muskmelons	\$74.5	Beans	\$110.7
Watermelons	\$106.9	Beetroot	\$12.6
Nashi	\$4.2	Broccoli/Baby Broccoli	\$255.7

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



*\*Note: The processed fruit lines marked with an asterisk (\*) do not contribute to total 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 2019	Production (\$m)	Year Ending June 2019	Production (\$m)
Brussels Sprouts	\$19.0	Potatoes	\$752.6
Cabbage	\$44.1	Pumpkins	\$82.0
Capsicums	\$171.1	Sweet Corn	\$76.9
Carrots	\$219.3	Sweetpotatoes	\$72.3
Cauliflower	\$54.1	Tomatoes	\$674.2
Celery	\$74.9	Zucchini	\$92.3
Chillies	\$8.9	Other Vegetables	\$89.1
Cucumbers	\$180.3	<b>All Nuts</b>	<b>\$1,156.7</b>
Eggplant	\$19.6	Almonds	\$835.1
Eng.Spinach/Silverbeet/Kale	\$16.6	Chestnuts	\$7.8
Fresh Herbs - Combined	\$197.9	Hazelnuts	\$3.0
Fennel	\$2.9	Macadamias	\$193.9
Parsley and Other Herbs	\$195.0	Pecans	\$21.8
Garlic	\$19.3	Pistachios	\$23.5
Ginger	\$26.8	Walnuts	\$43.7
Leafy Asian Vegetables	\$65.9	Other Nuts	\$27.9
Leafy Salad Vegetables	\$396.3	<b>Other Horticulture</b>	<b>\$2,962.7</b>
Leeks	\$25.7	Cut Flowers	\$281.3
Head Lettuce	\$172.8	<b>Nursery†</b>	<b>\$2,437.6</b>
Mushrooms	\$437.7	Turf	\$243.9
Onions	\$191.2		
Parsnips	\$11.8		
Peas	\$62.7		

*†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 472 to 477.*



## 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 2019.

Year Ending June 2019	Fresh Export Volume (t)
All Horticultural Products	827,775
<b>All Fruit</b>	<b>478,274</b>
Apples	4,416
Avocados	3,202
Bananas	
Berries - Combined	3,894
Blueberries	201
Rubus Berries	8
Strawberries	3,685
Cherries	5,035
Citrus - Combined	252,250
Grapefruit	1,203
Lemons/Limes	3,394
Mandarins	59,471
Oranges	188,056
Custard Apples	92
Kiwifruit	660
Lychees	484
Mangoes	8,221
Melons - Combined	21,455
Muskmelons	14,143
Watermelons	7,312
Nashi	

Year Ending June 2019	Fresh Export Volume (t)
Passionfruit	
Papaya/Pawpaw	45
Persimmons	125
Pears	9,190
Pineapples	
Summerfruit - Combined	23,045
Apricots	561
Nectarines/Peaches	15,645
Plums	6,839
Table Grapes	146,093
Processing Fruit Combined	
Dried Grapes	
Prunes	
Other Dried Tree Fruit	
Canned Fruit	
Olives	
Other Fruit	68
<b>All Vegetables</b>	<b>237,530</b>
Artichokes	6
Asparagus	3,799
Beans	1,741
Beetroot	351
Broccoli/Baby Broccoli	6,633

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2019	Fresh Export Volume (t)
Brussels Sprouts	365
Cabbage	1,739
Capsicums	352
Carrots	110,213
Cauliflower	904
Celery	5,310
Chillies	4
Cucumbers	93
Eggplant	7
Eng.Spinach/Silverbeet/Kale	266
Fresh Herbs - Combined	
Fennel	
Parsley and Other Herbs	
Garlic	
Ginger	16
Leafy Asian Vegetables	
Leafy Salad Vegetables	1,518
Leeks	156
Head Lettuce	565
Mushrooms	71
Onions	47,490
Parsnips	
Peas	10

Year Ending June 2019	Fresh Export Volume (t)
Potatoes	45,912
Pumpkins	2,653
Sweet Corn	
Sweetpotatoes	1,479
Tomatoes	1,000
Zucchini	
Other Vegetables	4,876
<b>All Nuts*</b>	<b>111,971</b>
Almonds*	86,451
Chestnuts*	
Hazelnuts*	16
Macadamias*	17,705
Pecans*	539
Pistachios*	1,324
Walnuts*	3,389
Other Nuts*	2,548
<b>Other Horticulture</b>	<b>N/A</b>
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 424 to 458.*





## 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 2019.

Year Ending June 2019	Fresh Export Value (\$m)	Year Ending June 2019	Fresh Export Value (\$m)
All Horticultural Products	\$2,645.7	Passionfruit	
<b>All Fruit</b>	<b>\$1,332.0</b>	Papaya/Pawpaw	\$0.2
Apples	\$10.6	Persimmons	\$0.8
Avocados	\$19.7	Pears	\$16.4
Bananas		Pineapples	
Berries - Combined	\$29.3	Summerfruit - Combined	\$89.0
Blueberries	\$4.8	Apricots	\$2.4
Rubus Berries	\$0.1	Nectarines/Peaches	\$61.6
Strawberries	\$24.4	Plums	\$25.0
Cherries	\$79.5	Table Grapes	\$555.2
Citrus - Combined	\$457.1	Processing Fruit Combined	
Grapefruit	\$2.1	Dried Grapes	
Lemons/Limes	\$7.2	Prunes	
Mandarins	\$139.4	Other Dried Tree Fruit	
Oranges	\$308.1	Canned Fruit	
Custard Apples	\$0.4	Olives	
Kiwifruit	\$2.1	Other Fruit	<\$0.1
Lychees	\$7.4	<b>All Vegetables</b>	<b>\$292.2</b>
Mangoes	\$30.7	Artichokes	<\$0.1
Melons - Combined	\$37.0	Asparagus	\$29.8
Muskmelons	\$24.3	Beans	\$7.3
Watermelons	\$12.7	Beetroot	\$1.1
Nashi		Broccoli/Baby Broccoli	\$19.5

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2019	Fresh Export Value (\$m)	Year Ending June 2019	Fresh Export Value (\$m)
Brussels Sprouts	\$2.1	Potatoes	\$30.7
Cabbage	\$3.1	Pumpkins	\$4.2
Capsicums	\$1.3	Sweet Corn	
Carrots	\$96.6	Sweetpotatoes	\$2.4
Cauliflower	\$2.2	Tomatoes	\$3.7
Celery	\$9.1	Zucchini	
Chillies	<\$0.1	Other Vegetables	\$16.2
Cucumbers	\$0.3	<b>All Nuts*</b>	<b>\$1,005.9</b>
Eggplant	<\$0.1	Almonds*	\$675.0
Eng.Spinach/Silverbeet/Kale	\$2.3	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	\$0.1
Fennel		Macadamias*	\$257.2
Parsley and Other Herbs		Pecans*	\$5.7
Garlic		Pistachios*	\$16.6
Ginger	\$0.2	Walnuts*	\$17.9
Leafy Asian Vegetables		Other Nuts*	\$33.3
Leafy Salad Vegetables	\$11.0	<b>Other Horticulture</b>	<b>\$15.6</b>
Leeks	\$0.6	Cut Flowers	\$10.1
Head Lettuce	\$1.8	<i>Nursery</i>	<i>\$5.5</i>
Mushrooms	\$7.5	Turf	
Onions	\$39.2		
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 424 to 458.*



## 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 2019.

Year Ending June 2019	Fresh Import Volume (t)	Year Ending June 2019	Fresh Import Volume (t)
All Horticultural Products	186,308	Passionfruit	
<b>All Fruit</b>	<b>108,529</b>	Papaya/Pawpaw	40
Apples	732	Persimmons	635
Avocados	14,562	Pears	
Bananas		Pineapples	
Berries - Combined	1,557	Summerfruit - Combined	2,704
Blueberries	1,555	Apricots	339
Rubus Berries		Nectarines/Peaches	2,027
Strawberries	2	Plums	339
Cherries	2,425	Table Grapes	16,809
Citrus - Combined	24,760	Processing Fruit Combined	
Grapefruit	1,221	Dried Grapes	
Lemons/Limes	4,403	Prunes	
Mandarins	4,612	Other Dried Tree Fruit	
Oranges	14,523	Canned Fruit	
Custard Apples		Olives	
Kiwifruit	23,262	Other Fruit	18,776
Lychees		<b>All Vegetables</b>	<b>32,964</b>
Mangoes	826	Artichokes	
Melons - Combined	97	Asparagus	4,092
Muskmelons	21	Beans	431
Watermelons	77	Beetroot	8
Nashi	1,345	Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2019	Fresh Import Volume (t)	Year Ending June 2019	Fresh Import Volume (t)
Brussels Sprouts		Potatoes	
Cabbage	1	Pumpkins	
Capsicums	672	Sweet Corn	
Carrots		Sweetpotatoes	640
Cauliflower		Tomatoes	899
Celery		Zucchini	
Chillies	7	Other Vegetables	3,259
Cucumbers		<b>All Nuts*</b>	<b>44,815</b>
Eggplant	1	Almonds*	4,593
Eng.Spinach/Silverbeet/Kale	65	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	3,242
Fennel		Macadamias*	466
Parsley and Other Herbs		Pecans*	
Garlic	13,060	Pistachios*	2,114
Ginger	216	Walnuts*	4,494
Leafy Asian Vegetables		Other Nuts*	29,906
Leafy Salad Vegetables	18	<b>Other Horticulture</b>	<b>N/A</b>
Leeks		Cut Flowers	N/A
Head Lettuce		<i>Nursery</i>	<i>N/A</i>
Mushrooms	3,839	Turf	N/A
Onions	4,983		
Parsnips			
Peas	773		

*\*Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 424 to 458.*



## 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 2019.

Year Ending June 2019	Fresh Import Value (\$m)	Year Ending June 2019	Fresh Import Value (\$m)
All Horticultural Products	\$1,094.5	Passionfruit	
<b>All Fruit</b>	<b>\$392.2</b>	Papaya/Pawpaw	\$0.2
Apples	\$1.9	Persimmons	\$3.2
Avocados	\$73.3	Pears	
Bananas		Pineapples	
Berries - Combined	\$33.0	Summerfruit - Combined	\$15.6
Blueberries	\$33.0	Apricots	\$1.6
Rubus Berries		Nectarines/Peaches	\$12.1
Strawberries	<\$0.1	Plums	\$2.0
Cherries	\$17.6	Table Grapes	\$81.3
Citrus - Combined	\$54.1	Processing Fruit Combined	
Grapefruit	\$2.4	Dried Grapes	
Lemons/Limes	\$12.5	Prunes	
Mandarins	\$11.7	Other Dried Tree Fruit	
Oranges	\$27.5	Canned Fruit	
Custard Apples		Olives	
Kiwifruit	\$60.3	Other Fruit	\$44.6
Lychees		<b>All Vegetables</b>	<b>\$118.9</b>
Mangoes	\$4.2	Artichokes	<\$0.1
Melons - Combined	\$0.2	Asparagus	\$25.0
Muskmelons	<\$0.1	Beans	\$0.5
Watermelons	\$0.1	Beetroot	<\$0.1
Nashi	\$2.8	Broccoli/Baby Broccoli	

Sources: GTA; IRB; (Freshlogic Analysis)



Year Ending June 2019	Fresh Import Value (\$m)	Year Ending June 2019	Fresh Import Value (\$m)
Brussels Sprouts		Potatoes	
Cabbage	<\$0.1	Pumpkins	
Capsicums	\$2.7	Sweet Corn	
Carrots		Sweetpotatoes	\$0.9
Cauliflower		Tomatoes	\$2.0
Celery		Zucchini	
Chillies	\$0.1	Other Vegetables	\$38.2
Cucumbers		<b>All Nuts*</b>	<b>\$464.3</b>
Eggplant	<\$0.1	Almonds*	\$42.8
Eng.Spinach/Silverbeet/Kale	\$0.1	Chestnuts*	
Fresh Herbs - Combined		Hazelnuts*	\$32.8
Fennel		Macadamias*	\$0.7
Parsley and Other Herbs		Pecans*	
Garlic	\$28.3	Pistachios*	\$29.7
Ginger	\$0.9	Walnuts*	\$37.4
Leafy Asian Vegetables		Other Nuts*	\$320.9
Leafy Salad Vegetables	\$0.1	<b>Other Horticulture</b>	<b>\$119.2</b>
Leeks		Cut Flowers	\$77.3
Head Lettuce		<i>Nursery</i>	<i>\$41.9</i>
Mushrooms	\$13.2	Turf	
Onions	\$4.6		
Parsnips			
Peas	\$2.1		

*\*Note: Nut imports includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 424 to 458.*



## 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 2019.

Year Ending June 2019	Fresh Supply (t)	Year Ending June 2019	Fresh Supply (t)
All Horticultural Products	4,085,859	Passionfruit	4,216
<b>All Fruit</b>	<b>1,771,712</b>	Papaya/Pawpaw	14,710
Apples	213,711	Persimmons	3,105
Avocados	91,516	Pears	66,136
Bananas	371,091	Pineapples	45,370
Berries - Combined	95,115	Summerfruit - Combined	108,278
Blueberries	18,713	Apricots	7,223
Rubus Berries	8,825	Nectarines/Peaches	84,689
Strawberries	67,577	Plums	16,366
Cherries	15,379	Table Grapes	78,992
Citrus - Combined	294,585	Processing Fruit Combined*	
Grapefruit	10,680	Dried Grapes*	
Lemons/Limes	45,050	Prunes*	
Mandarins	98,978	Other Dried Tree Fruit*	
Oranges	139,877	Canned Fruit*	
Custard Apples	1,744	Olives*	
Kiwifruit	29,736	Other Fruit	9,548
Lychees	2,249	<b>All Vegetables</b>	<b>2,220,245</b>
Mangoes	63,957	Artichokes	443
Melons - Combined	259,544	Asparagus	10,530
Muskmelons	45,013	Beans	36,702
Watermelons	214,531	Beetroot	5,337
Nashi	2,729	Broccoli/Baby Broccoli	65,603

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 2019	Fresh Supply (t)	Year Ending June 2019	Fresh Supply (t)
Brussels Sprouts	4,353	Potatoes	435,058
Cabbage	63,874	Pumpkins	111,485
Capsicums	72,819	Sweet Corn	32,330
Carrots	201,939	Sweetpotatoes	96,465
Cauliflower	68,496	Tomatoes	250,807
Celery	55,030	Zucchini	42,898
Chillies	1,738	Other Vegetables	22,541
Cucumbers	88,786	<b>All Nuts</b>	<b>93,902</b>
Eggplant	8,893	Almonds**	38,722
Eng.Spinach/Silverbeet/Kale	6,343	Chestnuts**	1,050
Fresh Herbs - Combined	11,311	Hazelnuts**	3,993
Fennel	1,407	Macadamias**	4,004
Parsley and Other Herbs	9,905	Pecans**	1,514
Garlic	10,175	Pistachios**	4,188
Ginger	3,721	Walnuts**	9,258
Leafy Asian Vegetables	29,229	Other Nuts**	31,173
Leafy Salad Vegetables	54,134	<b>Other Horticulture</b>	<b>N/A</b>
Leeks	10,653	Cut Flowers	N/A
Head Lettuce	136,373	<i>Nursery</i>	<i>N/A</i>
Mushrooms	73,949	Turf	N/A
Onions	197,674		
Parsnips	3,219		
Peas	7,335		

*\*\*Note: Nut supply volume includes both the kernel and in-shell form. Further information on volumes of each type is provided on pages 424 to 458.*





## 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 2019.

Year Ending June 2019	Wholesale Value (\$m)	Year Ending June 2019	Wholesale Value (\$m)
All Horticultural Products	\$14,407.7	Passionfruit	\$22.8
<b>All Fruit</b>	<b>\$5,208.3</b>	Papaya/Pawpaw	\$32.3
Apples	\$572.6	Persimmons	\$13.2
Avocados	\$512.2	Pears	\$121.1
Bananas	\$720.5	Pineapples	\$46.0
Berries - Combined	\$1,113.5	Summerfruit - Combined	\$449.0
Blueberries	\$436.1	Apricots	\$40.0
Rubus Berries	\$243.2	Nectarines/Peaches	\$351.2
Strawberries	\$434.2	Plums	\$57.8
Cherries	\$167.6	Table Grapes	\$330.8
Citrus - Combined	\$539.0	Processing Fruit Combined*	
Grapefruit	\$19.0	Dried Grapes*	
Lemons/Limes	\$142.2	Prunes*	
Mandarins	\$221.7	Other Dried Tree Fruit*	
Oranges	\$156.2	Canned Fruit*	
Custard Apples	\$7.7	Olives*	
Kiwifruit	\$93.0	Other Fruit	\$47.0
Lychees	\$33.0	<b>All Vegetables</b>	<b>\$5,010.0</b>
Mangoes	\$201.5	Artichokes	\$1.0
Melons - Combined	\$175.8	Asparagus	\$118.0
Muskmelons	\$63.2	Beans	\$124.4
Watermelons	\$112.6	Beetroot	\$12.1
Nashi	\$9.9	Broccoli/Baby Broccoli	\$280.2

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 2019	Wholesale Value (\$m)	Year Ending June 2019	Wholesale Value (\$m)
Brussels Sprouts	\$19.8	Potatoes	\$521.7
Cabbage	\$47.9	Pumpkins	\$91.9
Capsicums	\$200.7	Sweet Corn	\$81.7
Carrots	\$160.0	Sweetpotatoes	\$83.0
Cauliflower	\$61.0	Tomatoes	\$760.5
Celery	\$78.9	Zucchini	\$108.4
Chillies	\$10.2	Other Vegetables	\$67.3
Cucumbers	\$211.0	<b>All Nuts</b>	<b>\$1,006.9</b>
Eggplant	\$22.9	Almonds	\$383.7
Eng.Spinach/Silverbeet/Kale	\$17.3	Chestnuts	\$9.2
Fresh Herbs - Combined	\$232.0	Hazelnuts	\$40.5
Fennel	\$3.4	Macadamias	\$113.3
Parsley and Other Herbs	\$228.6	Pecans	\$23.5
Garlic	\$86.4	Pistachios	\$62.5
Ginger	\$29.2	Walnuts	\$97.2
Leafy Asian Vegetables	\$77.5	Other Nuts	\$276.8
Leafy Salad Vegetables	\$447.1	<b>Other Horticulture</b>	<b>\$3,182.5</b>
Leeks	\$29.7	Cut Flowers	\$378.1
Head Lettuce	\$201.5	<i>Nursery†</i>	<i>\$2,560.5</i>
Mushrooms	\$534.1	Turf	\$243.9
Onions	\$189.0		
Parsnips	\$13.9		
Peas	\$60.6		

*†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 472 to 477.*



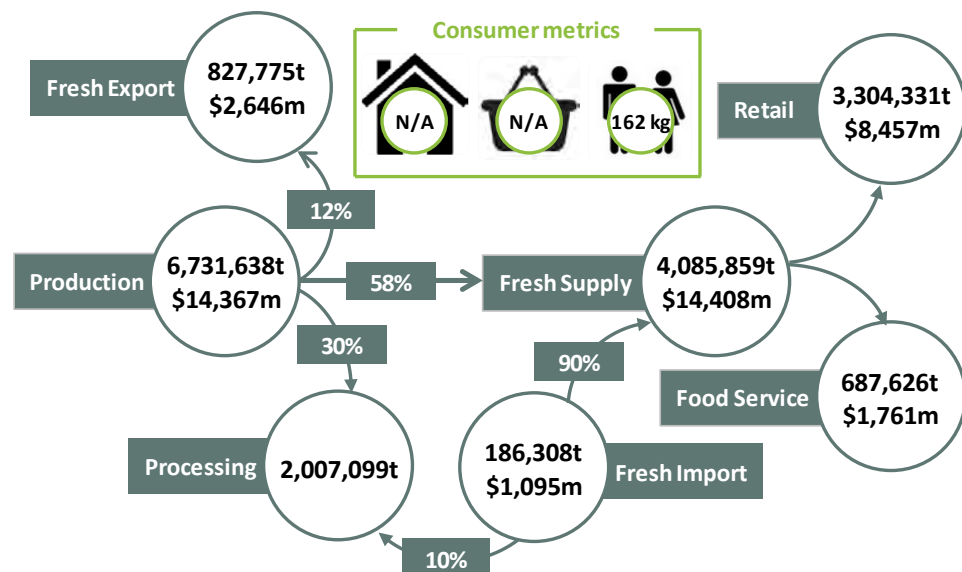
## All Fresh Horticulture Overview

Pages 50-53 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 2019:

- **6.73 million tonnes** of horticultural products (not including cut flowers, nursery and turf products) was produced in Australia and the value for all categories was **\$14.4 billion**.
- The wholesale value of the fresh supply was **\$14.4 billion** for all categories, with **\$8.5 billion** into retail and **\$1.8 billion** into food service (not including cut flowers, nursery, turf and nut products).
- The supply per capita was **162 kg**, based on the volume supplied.

### All Fresh Horticulture Supply Chain—Year Ending June 2019



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



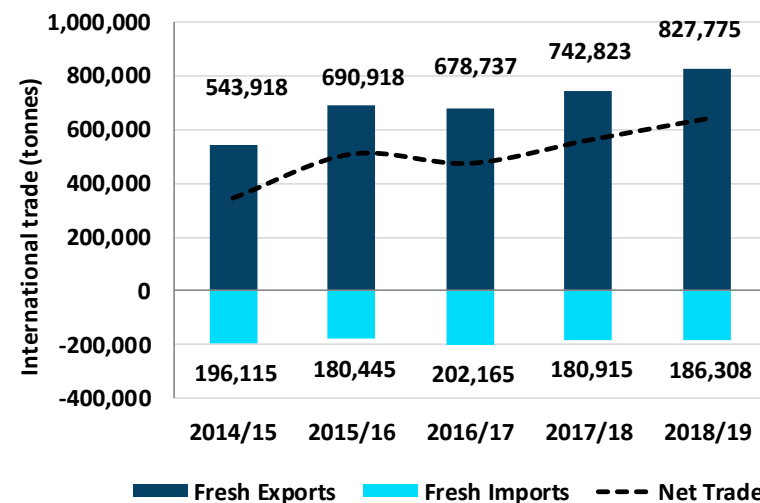
Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,459,157	6,639,824	+3%	6,731,638	+1%
Production (\$m)	\$13,000.0	\$13,258.5	+2%	\$14,366.9	+8%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	678,737	742,823	+9%	827,775	+11%
Fresh Export Value (\$m)	\$ 2,035.1	\$ 2,079.8	+2%	\$ 2,645.7	+27%
Fresh Import Volume (t)	202,165	180,915	-11%	186,308	+3%
Fresh Import Value (\$m)	\$ 1,082.0	\$ 1,012.2	-6%	\$ 1,094.5	+8%
Fresh Supply (t)	4,039,677	4,102,309	+2%	4,085,859	>-1%
Fresh Supply Wholesale Value (\$m)	\$13,408.8	\$13,535.1	<1%	\$14,407.7	+6%
Supply per Capita (kg)	164.81	164.54	>-1%	162.11	-1%

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 (2017/18 edition).

## All Fresh Horticulture International Trade

Australia is a net exporter of fresh horticultural products. For the year ending June 2019, Australia exported **826,669 tonnes** of fresh horticultural products (not including nursery, turf and flower categories), as profiled in the graph below, where imports are counted as negative tonnes.



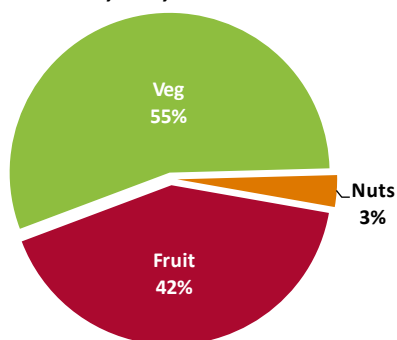
Source: GTA



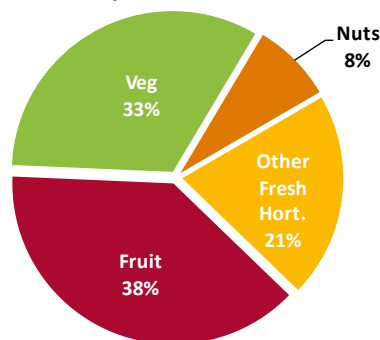
## Production

The charts below profile the share of total Australian production of all horticultural categories during the year ending June 2019. For the below charts, only the **value** of the **Other Fresh Horticulture** grouping has been recorded, due to inconsistencies in the units used to measure volumes for this group.

**Production -  
6,731,638 t**



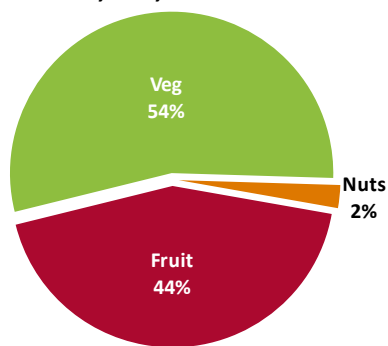
**Value of Production -  
\$14,365.3 m**



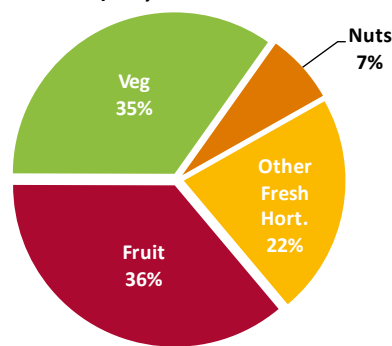
## Fresh supply

The charts below profile the share of the total fresh supply of all horticultural categories during the year ending June 2019.

**Fresh Supply Volume -  
4,085,859 t**



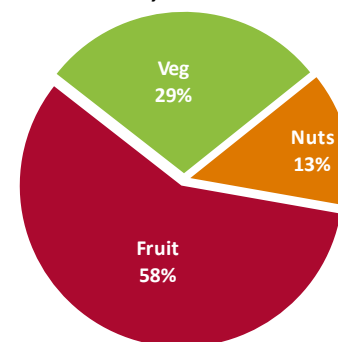
**Wholesale Value -  
\$14,406.0 m**



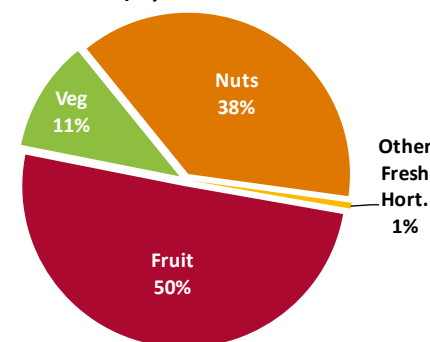
## Fresh exports

The charts below profile the share of total Australian fresh exports of all horticultural categories during the year ending June 2019.

**Fresh Export Volume -  
827,775 t**



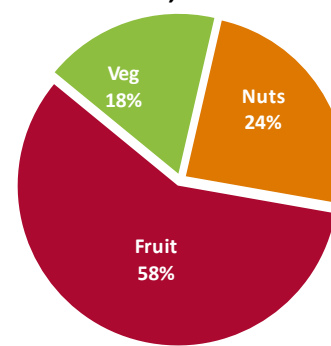
**Fresh Export Value -  
\$2,645.7 m**



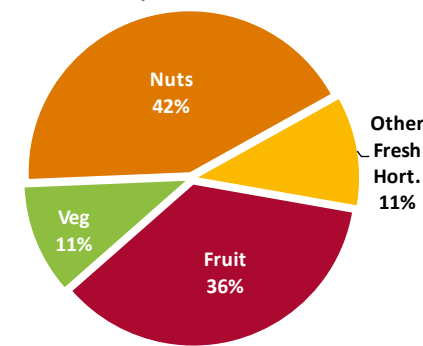
## Fresh imports

The charts below profile the share of total Australian fresh imports of all horticultural categories during the year ending June 2019.

**Fresh Import Volume -  
186,589 t**



**Fresh Import Value -  
\$1,097.6 m**





## Overview

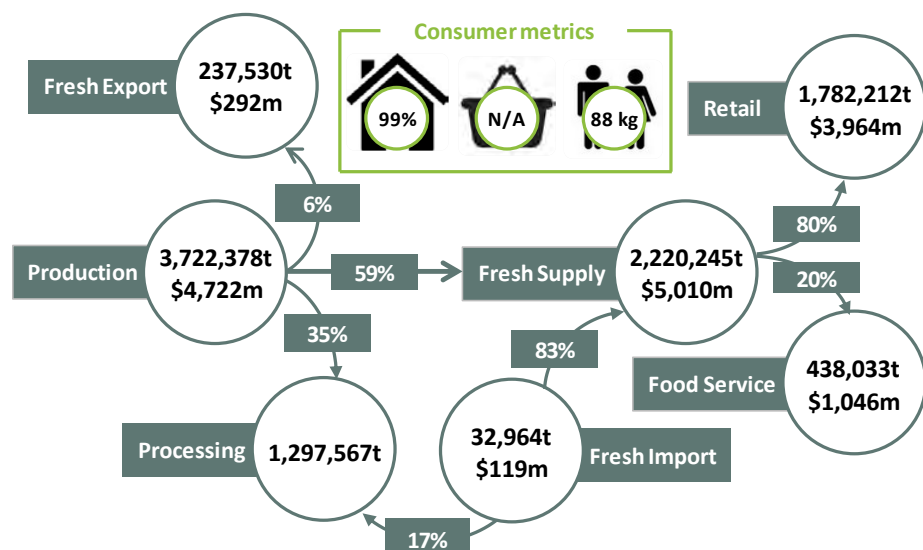
Pages 236-237 profile total vegetable production and trade. It combines information on all vegetable categories covered in this handbook.

For the year ending June 2019:

- **3.7 million tonnes** produced and valued at \$4,716 million.
  - The wholesale value of the fresh supply was **\$5.03 billion**, with **\$3,960 million** distributed into retail and **\$1,043 million** into food service.
  - The supply per capita was **88 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 2019



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



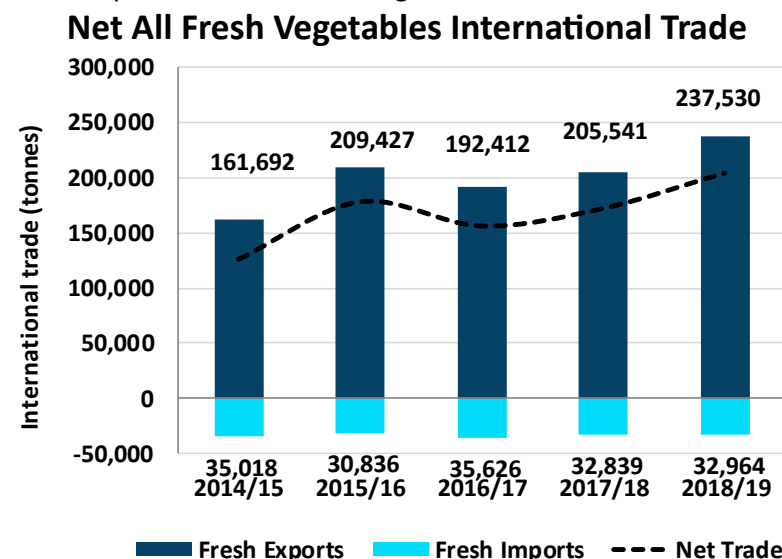
Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,502,669	3,695,613	+6%	3,722,378	<1%
Production (\$m)	\$ 4,296.9	\$ 4,345.5	+1%	\$ 4,722.1	+9%
Production area (Ha)	93,791	93,592	>-1%	-	-
Fresh Export Volume (t)	192,412	205,541	+7%	237,530	+16%
Fresh Export Value (\$m)	\$ 250.6	\$ 254.7	+2%	\$ 292.2	+15%
Fresh Import Volume (t)	35,626	32,839	-8%	32,964	<1%
Fresh Import Value (\$m)	\$ 125.2	\$ 100.9	-19%	\$ 118.9	+18%
Fresh Supply (t)	2,125,792	2,214,007	+4%	2,220,245	<1%
Fresh Supply Wholesale Value (\$m)	\$ 4,590.0	\$ 4,620.8	<1%	\$ 5,010.0	+8%
Supply per Capita (kg)	86.73	88.80	+2%	88.09	>-1%

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

*\*Note: Figures have been modified from those published in the previous edition of the handbook (2017/18 edition).*

## All Fresh Vegetables International Trade

Australia is a net exporter of fresh vegetables. For the year ending June 2019 Australia exported **237,530 tonnes** of fresh vegetables, as profiled in the graph below, where exports are counted as negative tonnes.



Source: GTA





## Fresh Artichoke Overview

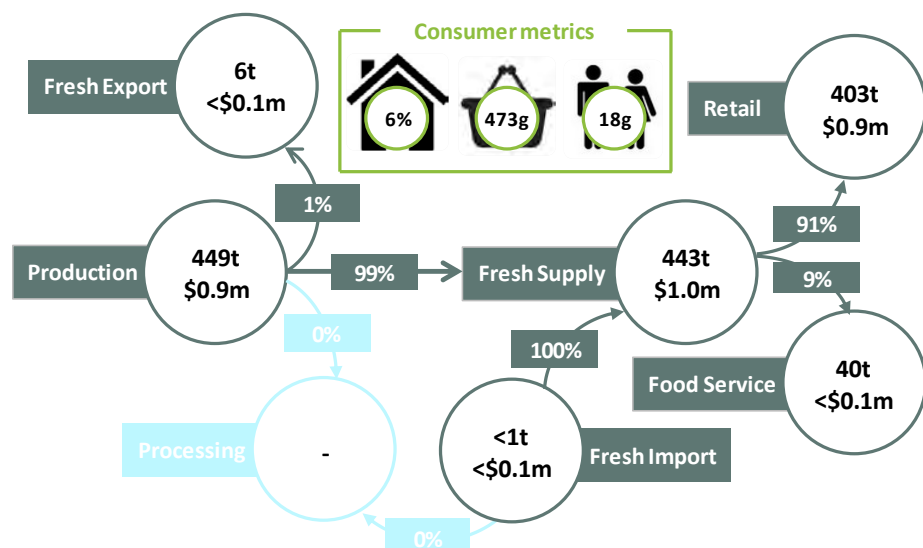
In this report, 'artichokes' refers only to globe artichokes. It does not cover Jerusalem Artichokes. Artichoke production occurs predominantly in Victoria, with other states producing smaller quantities. The majority of artichokes grown in Australia are destined for the fresh market, with a small export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



For the year ending June 2019:

- **449 tonnes** was produced and valued at **\$0.9 m**.
- The wholesale value of the fresh supply was **\$1.0 m**, with **\$0.9 m** distributed into retail and **\$0.1 m** into food service.
- **6%** of Australian households purchased artichokes, buying an average of **473 g** of artichokes per shopping trip.
- The supply per capita was **18 g**, based on the volume supplied.

## Fresh Artichoke Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	374	402	+8%	449	+12%
Production (\$m)	\$ 0.9	\$ 1.0	+5%	\$ 0.9	-5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	7	5	-27%	6	+14%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-17%	< \$0.1	-9%
Fresh Import Volume (t)	-	-	-	<1	-
Fresh Import Value (\$m)	\$ -	\$ -	-	< \$0.1	-
Fresh Supply (t)	367	397	+8%	443	+12%
Fresh Supply Wholesale Value (\$m)	\$ 1.0	\$ 1.1	+6%	\$ 1.0	-5%
Supply per Capita (kg)	0.01	0.02	+6%	0.02	+10%

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

## Major Artichoke Production Areas

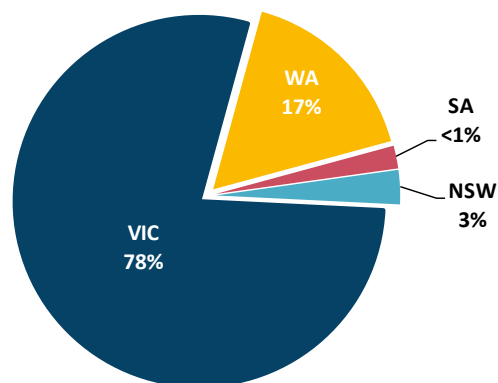
Artichokes are produced in the southern states of Australia, predominantly in the Victorian region of **Werribee**. The **Perth region** of Western Australia is also a significant producing area.



Source: AUSVEG



## 2018/19 Fresh Artichokes Production by State



Source: AUSVEG

## Fresh Artichokes Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	9												
Victoria	231												
Western Australia	49												
South Australia	6												
Availability legend			High		Medium		Low						None

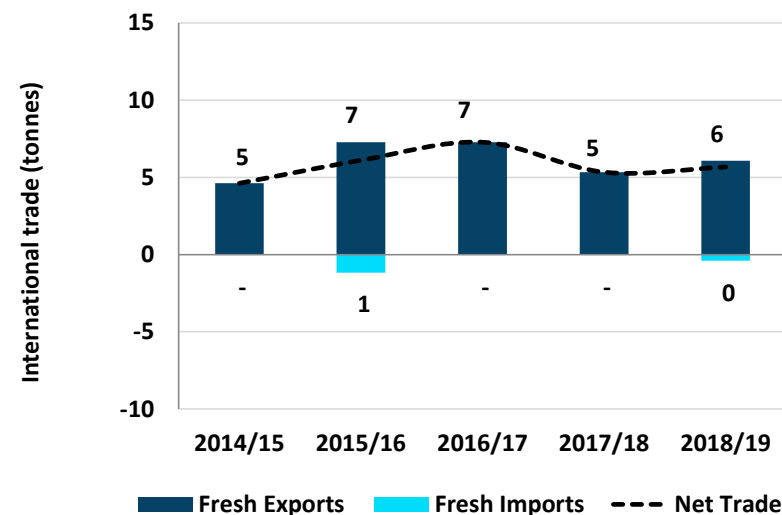
Source: AUSVEG

## Fresh Artichokes International Trade

There is minimal trade of artichokes, with Australia only occasionally importing small volumes, and typically exporting between **1-7 tonnes** every year. For the year ending June 2019, Australia exported **6 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



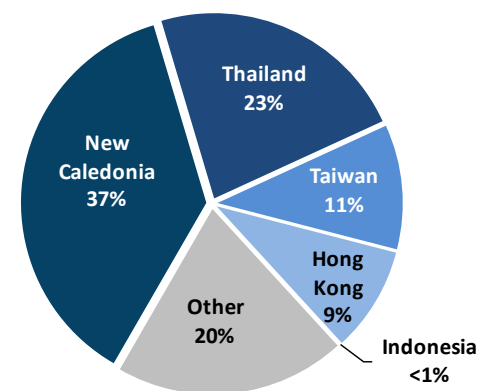
## Net Fresh Artichokes International Trade



Source: GTA

For the year ending June 2019, **37%** of exported fresh artichokes were sent to New Caledonia, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	-	-	< 0.5	Victoria	5	3	3
<b>Other</b>	-	-	<b>&lt; 0.5</b>	New South Wales	1	1	2
<b>TOTAL</b>	-	-	<b>0.40</b>	Queensland	1	1	1
				South Australia	< 0.5	-	-
				<b>Other</b>	<b>&lt; 0.5</b>	-	-
				<b>TOTAL</b>	<b>7</b>	<b>5</b>	<b>6</b>

## Fresh Artichokes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Egypt	-	-	< 0.5	New Caledonia	4	2	2
<b>Other</b>	-	-	<b>&lt; 0.5</b>	Thailand	1	< 0.5	1
<b>TOTAL</b>	-	-	<b>&lt; 1</b>	Taiwan	< 0.5	< 0.5	1
				Hong Kong	< 0.5	< 0.5	1
				Indonesia	< 0.5	1	< 0.5
				<b>Other</b>	<b>2</b>	<b>3</b>	<b>1</b>
				<b>TOTAL</b>	<b>7</b>	<b>5</b>	<b>6</b>

Source: GTA





## Asparagus

### Fresh Asparagus Overview

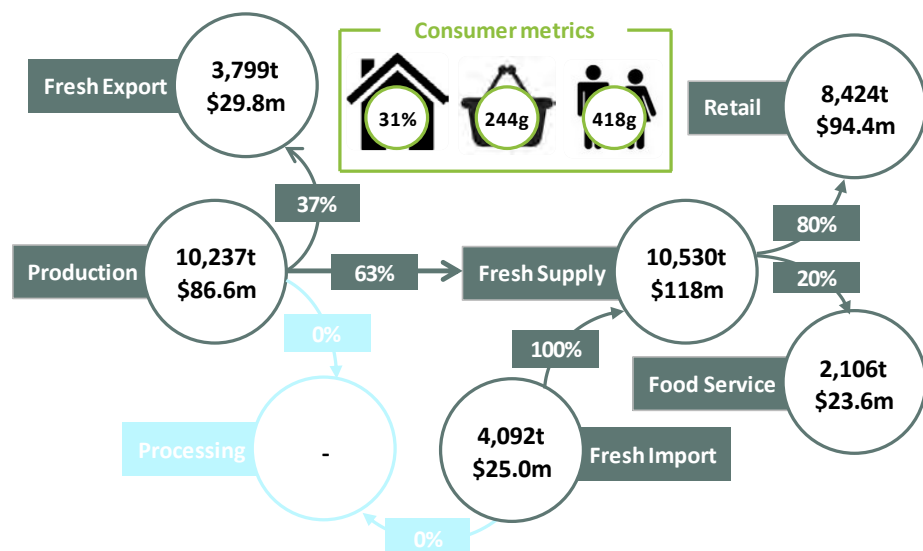
Asparagus production occurs predominantly in Victoria. There are typically two asparagus harvests: a spring cut, mainly destined for the export market, and a summer cut, primarily destined for the domestic market. There is minimal processing of local production, due to the low cost of imported product.

For the year ending June 2019:

- **10,237 t** produced and valued at **\$86.6 m**.
- The wholesale value of the fresh supply was **\$118 m**, with **\$94.4 m** distributed into retail and **\$23.6 m** into food service.
- **31%** of Australian households purchased asparagus, buying an average of **244 g** of asparagus per shopping trip.
- The supply per capita was **418 g**, based on the volume supplied.



### Fresh Asparagus Supply Chain—Year Ending June 2019



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

## Asparagus



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	8,033	7,576	-6%	10,237	+35%
Production (\$m)	\$ 52.9	\$ 61.0	+15%	\$ 86.6	+42%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5,056	3,711	-27%	3,799	+2%
Fresh Export Value (\$m)	\$ 31.0	\$ 27.8	-10%	\$ 29.8	+7%
Fresh Import Volume (t)	4,249	4,272	<1%	4,092	-4%
Fresh Import Value (\$m)	\$ 25.2	\$ 22.3	-11%	\$ 25.0	+12%
Fresh Supply (t)	7,226	8,138	+13%	10,530	+29%
Fresh Supply Wholesale Value (\$m)	\$ 75.9	\$ 92.4	+22%	\$ 118.0	+28%
Supply per Capita (kg)	0.29	0.33	+11%	0.42	+28%

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

### Major Asparagus Production Areas

Asparagus is primarily grown in Victoria, particularly in the **Koo Wee Rup** region near Melbourne. **Mildura** is another major growing region. Other states produce smaller quantities. Koo Wee Rup is well suited to growing asparagus due to the peaty loam soil.

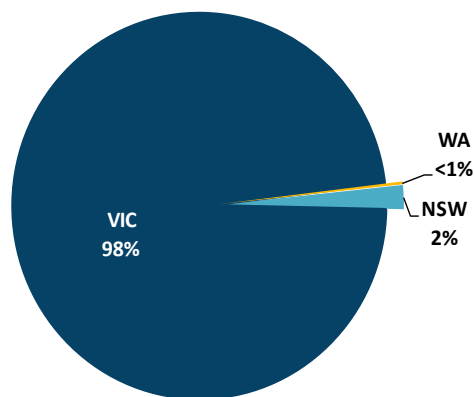


Source: AUSVEG





## 2018/19 Fresh Asparagus Production by State



Source: AUSVEG

## Fresh Asparagus Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	206												
Victoria	10,007												
Western Australia	24												
Imported	4,092												
Availability legend			High		Medium		Low					None	

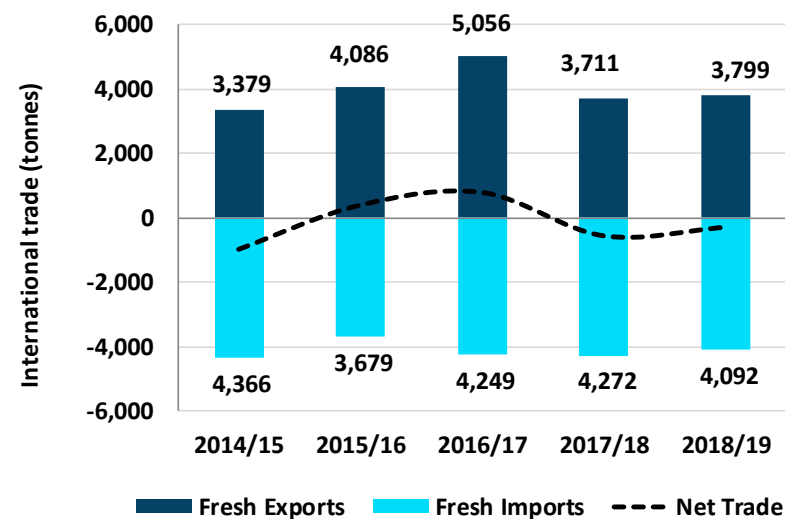
Source: AUSVEG

## Fresh Asparagus International Trade

Australia is a net exporter of fresh asparagus, typically importing between **4,000-4,400 tonnes** per year. For the year ending June 2019, Australia imported **4,092 tonnes**, and exported **3,799 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



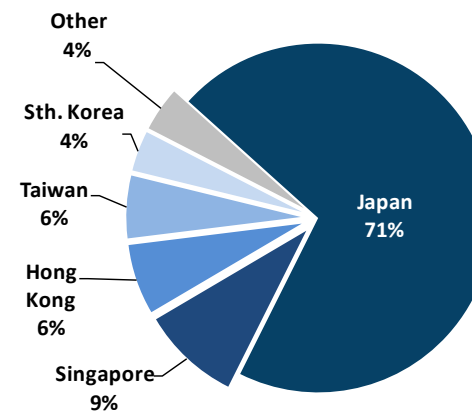
## Net Fresh Asparagus International Trade



Source: GTA

For the year ending June 2019, **71%** of exported fresh asparagus was sent to Japan, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	2,287	2,279	2,092	Victoria	5,043	3,672	3,747
Victoria	1,068	928	849	New South Wales	7	34	31
Queensland	454	593	659	Queensland	5	5	10
Western Australia	440	472	493	Tasmania	1	-	9
<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>&lt; 0.5</b>	Western Australia	< 0.5	-	1
<b>TOTAL</b>	<b>4,249</b>	<b>4,272</b>	<b>4,092</b>	<b>Other</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>5,056</b>	<b>3,711</b>	<b>3,799</b>

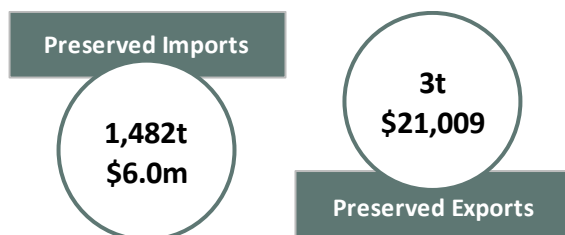
## Fresh Asparagus Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Mexico	3,098	3,074	3,108	Japan	4,086	2,792	2,687
Peru	1,033	1,008	918	Singapore	307	297	347
US	75	172	42	Hong Kong	262	217	247
Thailand	22	10	19	Taiwan	227	257	220
Canada	-	-	4	Sth. Korea	105	90	142
<b>Other</b>	<b>21</b>	<b>8</b>	<b>1</b>	<b>Other</b>	<b>70</b>	<b>59</b>	<b>156</b>
<b>TOTAL</b>	<b>4,249</b>	<b>4,272</b>	<b>4,092</b>	<b>TOTAL</b>	<b>5,056</b>	<b>3,711</b>	<b>3,799</b>

Source: GTA

## Processed Asparagus International Trade

For the year ending June 2019, an additional **1,482 tonnes** of preserved asparagus were imported, while **3 tonnes** were exported. These volumes have not been included in the fresh imports and exports profiled on page 246.



Source: GTA





## Fresh Beans Overview

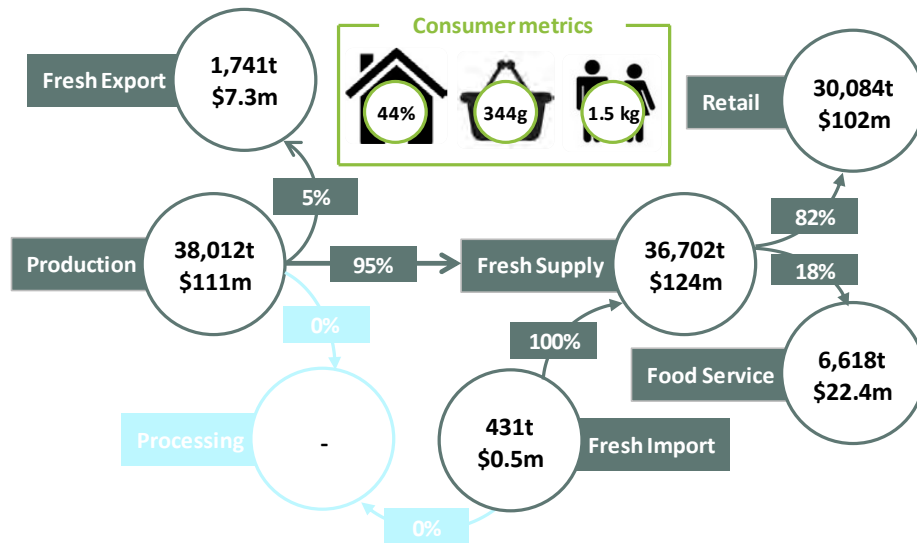
'Beans' refers to green beans, French beans and runner beans. This report does not cover Navy beans and other varieties that are commonly sold tinned. Green bean production occurs predominantly in Queensland. There is minimal processing of local production, due to the low cost of imported product.

For the year ending June 2019:

- **38,012 t** produced and valued at **\$111 m**.
- The wholesale value of the fresh supply was **\$124 m**, with **\$102 m** distributed into retail and **\$22.4 m** into food service.
- **44%** of Australian households purchased green beans, buying an average of **344 g** of beans per trip.
- The supply per capita was **1.5 kg**, based on the volume supplied.



### Fresh Beans Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	29,039	33,890	+17%	38,012	+12%
Production (\$m)	\$ 77.8	\$ 76.4	-2%	\$ 110.7	+45%
Production area (Ha)	7,661	7,172	-6%	-	-
Fresh Export Volume (t)	1,594	1,639	+3%	1,741	+6%
Fresh Export Value (\$m)	\$ 6.9	\$ 6.9	<1%	\$ 7.3	+6%
Fresh Import Volume (t)	717	438	-39%	431	-1%
Fresh Import Value (\$m)	\$ 0.7	\$ 0.5	-21%	\$ 0.5	<1%
Fresh Supply (t)	28,163	32,688	+16%	36,702	+12%
Fresh Supply Wholesale Value (\$m)	\$ 86.9	\$ 84.2	-3%	\$ 124.4	+48%
Supply per Capita (kg)	1.15	1.31	+14%	1.46	+11%

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

## Major Beans Production Areas

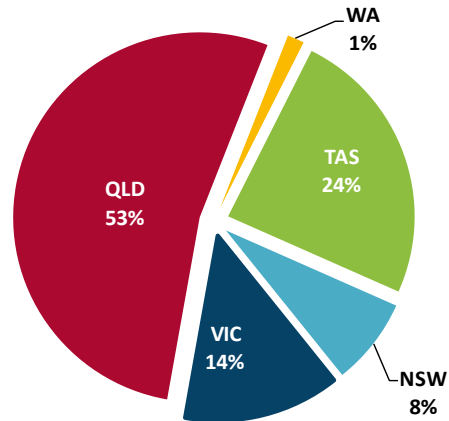
Beans are grown predominantly along the East Coast of Australia, with the majority of production occurring in Queensland. The major growing regions are **Innisfail** and **Bundaberg** in Queensland. **Gippsland** in Victoria is another major growing region.



Source: AUSVEG



## 2018/19 Fresh Beans Production by State



Source: ABS

## Fresh Beans Seasonality by State

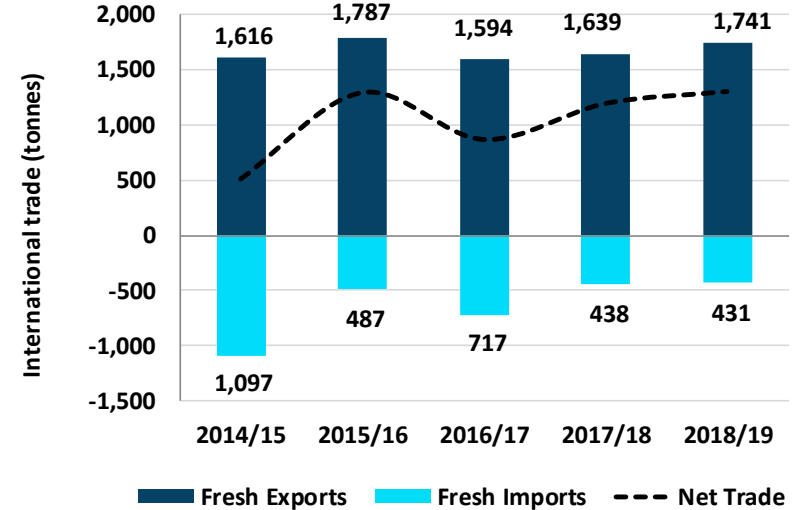
State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,893												
Victoria	5,139												
Queensland	20,196												
Western Australia	555												
Tasmania	9,230												
Availability legend			High		Medium		Low						None

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 2019, Australia exported **1,741 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

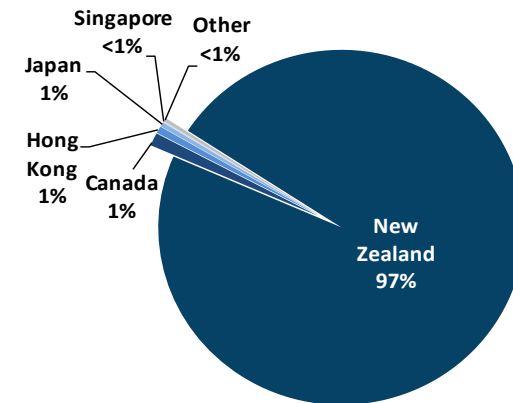
## Net Fresh Beans International Trade



Source: GTA

For the year ending June 2019, **97%** of exported fresh beans were sent to New Zealand, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	673	327	293	Queensland	1,573	1,611	1,708
Western Australia	26	56	74	New South Wales	3	23	23
New South Wales	-	-	48	Victoria	7	1	10
Queensland	18	54	16	Western Australia	1	3	-
<b>TOTAL</b>	<b>717</b>	<b>438</b>	<b>431</b>	Tasmania	-	<0.5	-
				<b>Other</b>	<b>9</b>	<b>&lt;0.5</b>	<b>-</b>
				<b>TOTAL</b>	<b>1,594</b>	<b>1,639</b>	<b>1,741</b>

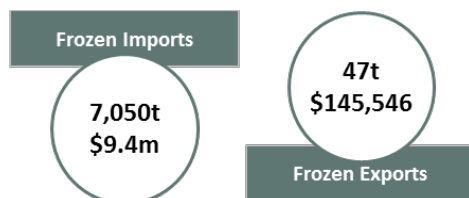
## Fresh Beans Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Canada	277	219	252	New Zealand	1,547	1,597	1,695
US	360	116	53	Canada	6	23	20
Myanmar	39	43	38	Hong Kong	22	15	11
Belgium	2	12	36	Japan	-	-	7
Tanzania	-	-	24	Singapore	11	<0.5	2
<b>Other</b>	<b>39</b>	<b>47</b>	<b>28</b>	<b>Other</b>	<b>7</b>	<b>4</b>	<b>6</b>
<b>TOTAL</b>	<b>717</b>	<b>438</b>	<b>431</b>	<b>TOTAL</b>	<b>1,594</b>	<b>1,639</b>	<b>1,741</b>

Source: GTA

## Processed Beans International Trade

For the year ending June 2019, an additional **7,050 tonnes** of frozen beans were imported, while **47 tonnes** were exported.



Source: GTA





## Fresh Beetroot Overview

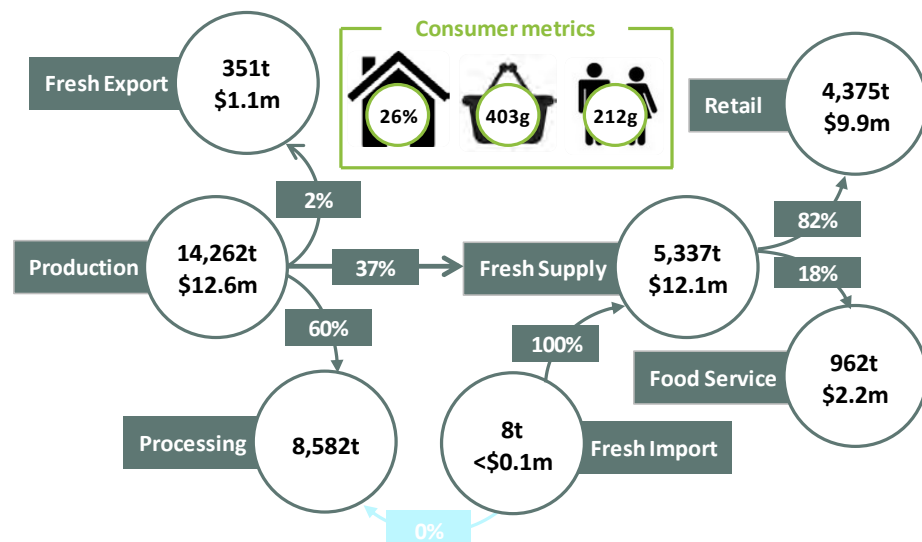
Beetroot production occurs predominantly in Queensland. Volumes grown for processing have decreased in recent years, however the majority of processed volume is tinned.

For the year ending June 2019:

- **14,262 t** produced and valued at **\$12.6 m** with **60%** sent to processing.
- The wholesale value of the fresh supply was **\$12.1 m**, with **\$9.9 m** distributed into retail and **\$2.2 m** into food service.
- **26%** of Australian households purchased fresh beetroot, buying an average of **403 g** of beetroot per shopping trip.
- The supply per capita was **212 g**, based on the volume supplied.



## Fresh Beetroot Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	14,053	14,353	+2%	14,262	>-1%
Production (\$m)	\$ 10.7	\$ 11.9	+11%	\$ 12.6	+6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	367	230	-37%	351	+52%
Fresh Export Value (\$m)	\$ 0.8	\$ 0.7	-15%	\$ 1.1	+59%
Fresh Import Volume (t)	3	3	-14%	8	>100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	-66%	< \$0.1	+89%
Fresh Supply (t)	5,232	5,489	+5%	5,337	-3%
Fresh Supply Wholesale Value (\$m)	\$ 10.3	\$ 11.7	+13%	\$ 12.1	+3%
Supply per Capita (kg)	0.21	0.22	+3%	0.21	-4%

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

## Major Beetroot Production Areas

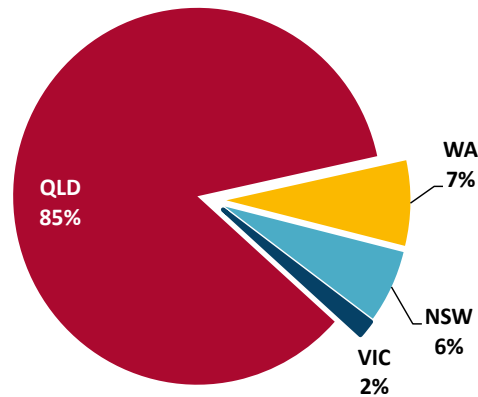
The majority of beetroot production occurs in Queensland. The major growing regions are the **Lockyer Valley** and **Fassifern Valley** in Queensland.



Source: AUSVEG



## 2018/19 Fresh Beetroot Production by State



Source: AUSVEG

## Fresh Beetroot Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	893												
Victoria	206												
Queensland	12,121												
Western Australia	1,042												
Availability legend		High		Medium		Low		None					

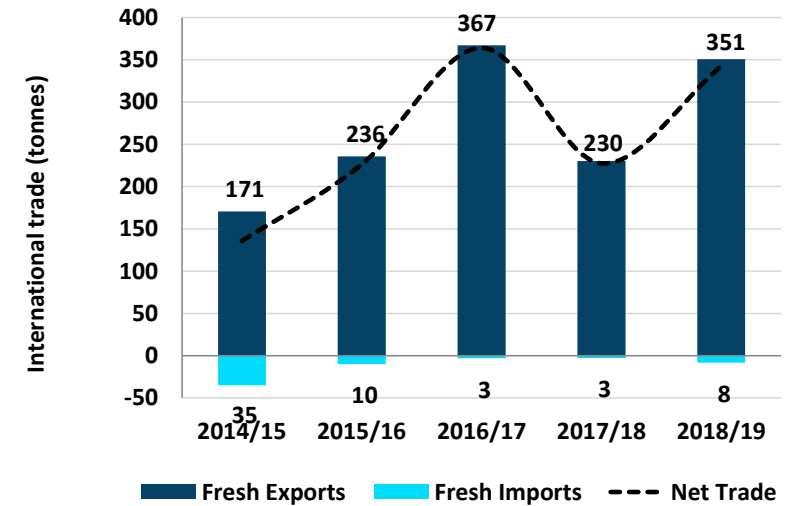
Source: AUSVEG

## Fresh Beetroot International Trade

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

For the year ending June 2019, Australia exported **351 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

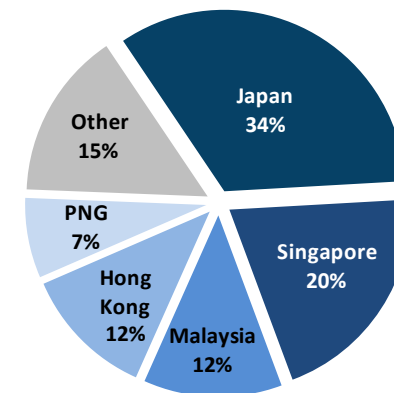
## Net Fresh Beetroot/Celeriacs/Radishes International Trade



Source: GTA

For the year ending June 2019, **34%** of exported fresh beetroot was sent to Japan, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Western Australia	3	2	4	Queensland	98	93	181
New South Wales	2	1	4	Victoria	83	65	81
Victoria	1	-	-	South Australia	59	29	45
<b>TOTAL</b>	<b>5</b>	<b>3</b>	<b>8</b>	New South Wales	41	32	35
				Western Australia	86	10	6
				<b>Other</b>	<b>&lt; 0.5</b>	<b>1</b>	<b>3</b>
				<b>TOTAL</b>	<b>367</b>	<b>230</b>	<b>351</b>

## Fresh Beetroot/Celeriacs/Radishes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
New Zealand	-	-	4	Japan	14	40	118
India	1	1	4	Singapore	218	49	71
Belgium	3	2	-	Malaysia	24	43	43
Austria	1	-	-	Hong Kong	32	35	41
Vietnam	1	-	-	PNG	19	14	25
<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>0</b>	<b>Other</b>	<b>60</b>	<b>50</b>	<b>52</b>
<b>TOTAL</b>	<b>5</b>	<b>3</b>	<b>8</b>	<b>TOTAL</b>	<b>367</b>	<b>230</b>	<b>351</b>

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

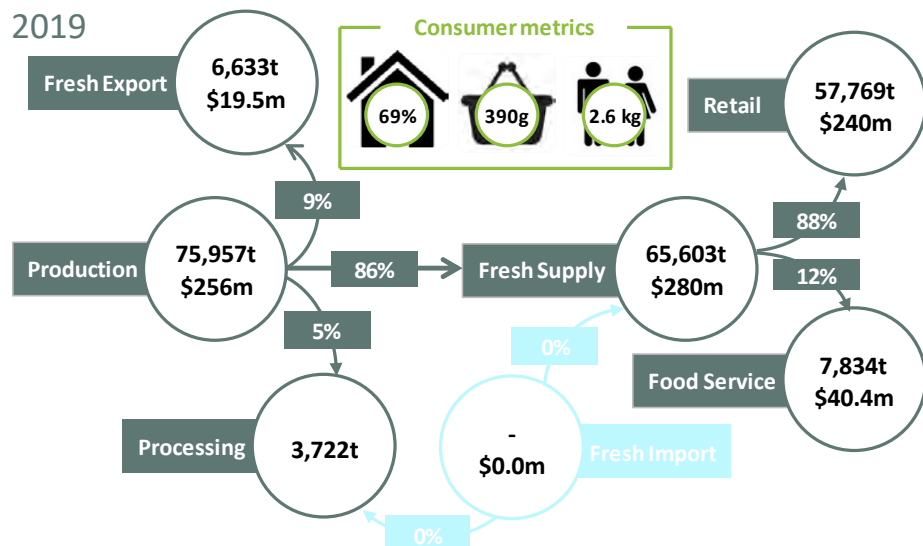
This section combines **broccoli** and **baby broccoli**. Baby broccoli refers to two distinct crops: baby broccoli is one of a number of varieties of modified broccoli; and Broccolini™, a cross between broccoli and the leafy Asian Vegetable 'Gai Lan' (Chinese Broccoli).

For the year ending June 2019:

- **75,957 t** produced and valued at **\$256 m** with **5%** sent to processing.
- The wholesale value of the fresh supply was **\$280 m**, with **\$240 m** distributed into retail and **\$40.4 m** into food service.
- **69%** of Australian households purchased broccoli, buying an average of **390 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 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	75,247	76,104	+1%	75,957	>-1%
Production (\$m)	\$ 228.6	\$ 229.8	<1%	\$ 255.7	+11%
Production area (Ha)	8,190	6,755	-18%	-	-
Fresh Export Volume (t)	5,010	5,861	+17%	6,633	+13%
Fresh Export Value (\$m)	\$ 15.3	\$ 16.0	+5%	\$ 19.5	+22%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	66,500	66,471	>-1%	65,603	-1%
Fresh Supply Wholesale Value (\$m)	\$ 252.7	\$ 253.4	<1%	\$ 280.2	+11%
Supply per Capita (kg)	2.71	2.67	-2%	2.60	-2%

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

## Major Broccoli/Baby Broccoli Production Areas

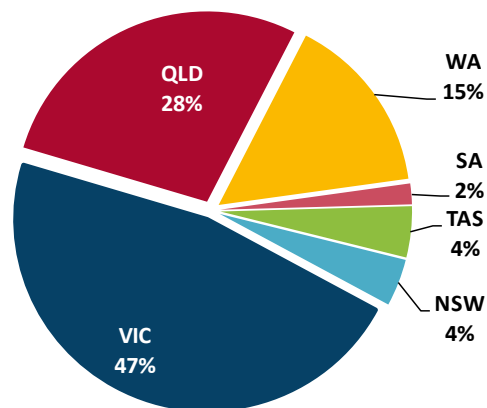
Broccoli is grown in most states of Australia, with the largest producing state being Victoria. The major growing regions include: the **Lockyer Valley** and **Stanthorpe** in Queensland; **Windsor** and **Forbes** in New South Wales; **Robinvale** and the **Melbourne region** in Victoria, and the **Adelaide region** in South Australia.



Sources: AUSVEG



## 2018/19 Fresh Broccoli Production by State



Source: ABS

## Fresh Broccoli Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,046												
Victoria	35,478												
Queensland	21,208												
Western Australia	11,592												
South Australia	1,337												
Tasmania	3,295												
Availability legend		<div>High</div> <div>Medium</div> <div>Low</div> <div>None</div>											

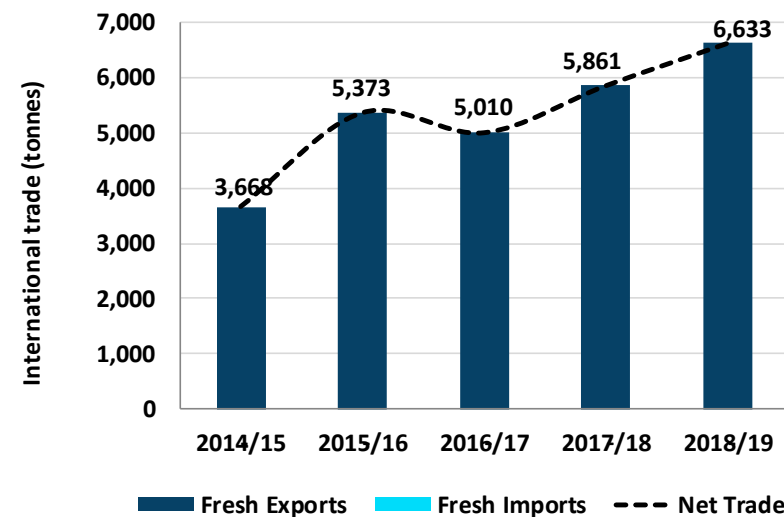
Source: AUSVEG

## 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 2019, Australia exported **6,633 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

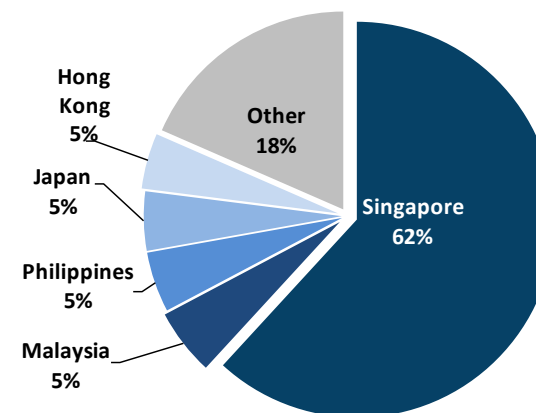
## Net Fresh Broccoli and Cauliflower International Trade



Source: GTA

For the year ending June 2019, **62%** of exported fresh broccoli/cauliflower was sent to Singapore, as profiled in the chart below.

## 2018/19 Fresh Broccoli and Cauliflower Export by Country



Source: GTA



## Fresh Broccoli and Cauliflower Exports by State

Exports by country (Tonnes)			
Year Ending June	2017	2018	2019
Queensland	3,199	3,106	3,669
Victoria	1,712	2,023	2,151
Western Australia	382	894	871
New South Wales	321	541	816
South Australia	6	29	17
<b>Other</b>	<b>74</b>	<b>68</b>	<b>13</b>
<b>TOTAL</b>	<b>5,693</b>	<b>6,661</b>	<b>7,537</b>

## Fresh Broccoli and Cauliflower Exports by Country

Exports by country (Tonnes)			
Year Ending June	2017	2018	2019
Singapore	4,206	4,766	4,660
Malaysia	211	289	409
Philippines	40	180	372
Japan	53	159	364
Hong Kong	149	222	342
<b>Other</b>	<b>1,035</b>	<b>1,044</b>	<b>1,391</b>
<b>TOTAL</b>	<b>5,693</b>	<b>6,661</b>	<b>7,537</b>

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

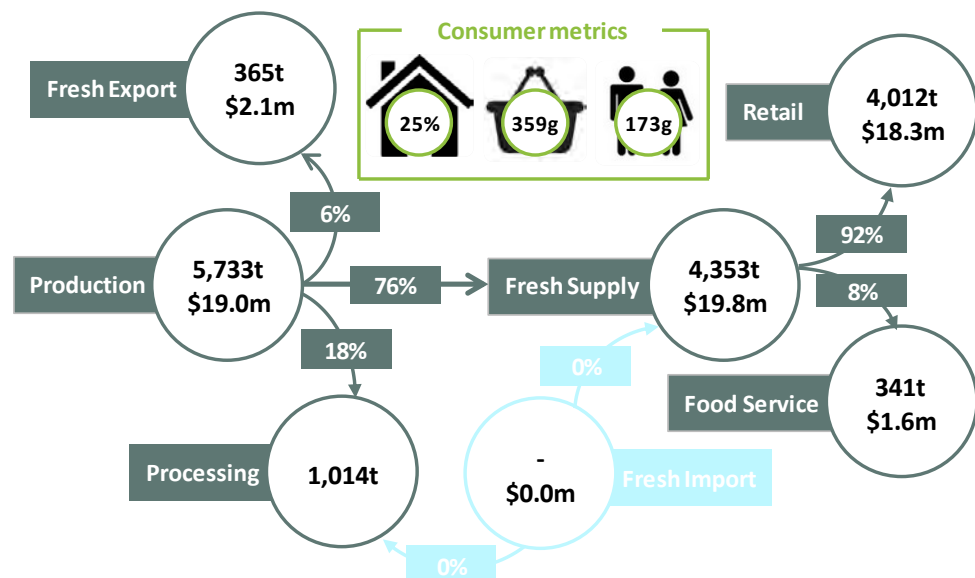
Brussels sprouts production occurs in the southern states of Australia, with the majority of production occurring in South Australia.

For the year ending June 2019:

- **5,733 t** was produced and valued at **\$19 m** with **18%** sent to processing.
- The wholesale value of the fresh supply was **\$19.8 m**, with **\$18.3 m** distributed to retail and **\$1.6 m** into food service.
- **25%** of Australian households purchased Brussels sprouts, buying an average of **359 g** of Brussels sprouts per shopping trip.
- The supply per capita was **173 g**, based on the volume supplied.



## Fresh Brussels Sprouts Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	5,734	6,210	+8%	5,733	-8%
Production (\$m)	\$ 17.7	\$ 18.3	+3%	\$ 19.0	+4%
Production area (Ha)	356	365	+3%	-	-
Fresh Export Volume (t)	248	266	+7%	365	+37%
Fresh Export Value (\$m)	\$ 1.1	\$ 1.2	+13%	\$ 2.1	+69%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	4,471	4,845	+8%	4,353	-10%
Fresh Supply Wholesale Value (\$m)	\$ 19.4	\$ 19.9	+3%	\$ 19.8	>-1%
Supply per Capita (kg)	0.18	0.19	+7%	0.17	-11%

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

## Major Brussels Sprouts Production Areas

Brussels sprouts are grown in the southern states of Australia, with the largest producing state being South Australia. The major growing regions include the **Adelaide Hills** in South Australia, **Coldstream** in Victoria, and **Forth** in Tasmania.

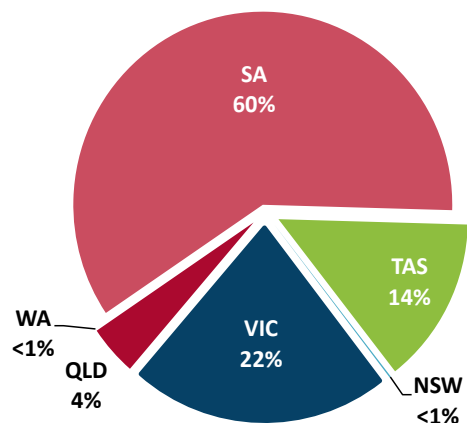


Source: AUSVEG





## 2018/19 Fresh Brussels Sprouts Production by State



Source: ABS

## Fresh Brussels Sprouts Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	7												
Victoria	1,247												
Queensland	242												
Western Australia	0												
South Australia	3,434												
Tasmania	803												
Availability legend			High		Medium		Low						

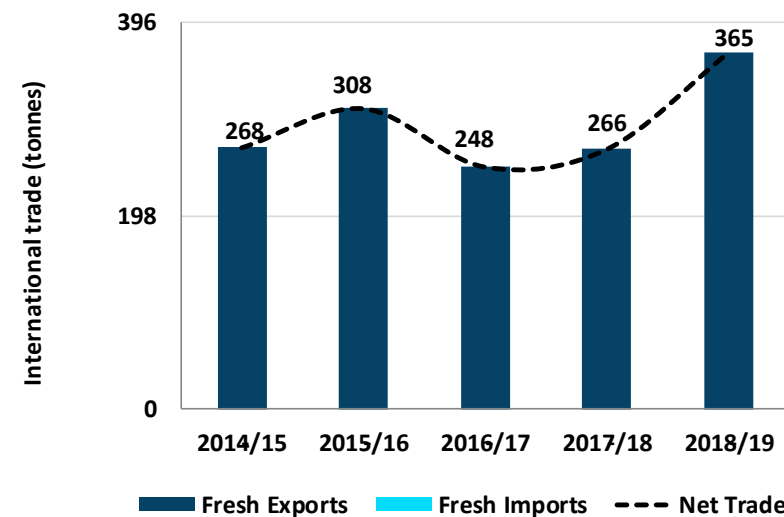
Source: AUSVEG

## Fresh Brussels Sprouts International Trade

Australia is a net exporter of Brussels Sprouts. For the year ending June 2019, Australia exported **365 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



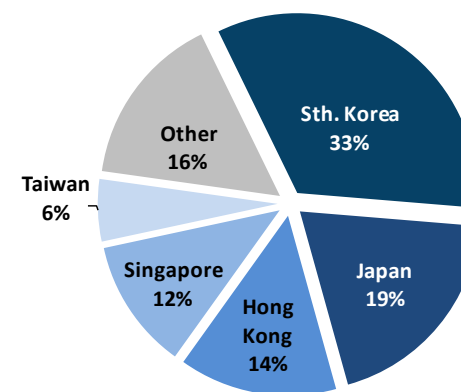
## Net Fresh Brussels Sprouts International Trade



Source: GTA

For the year ending June 2019, **33%** of exported fresh Brussels Sprouts was sent to South Korea, as profiled in the chart below.

## 2018/19 Fresh Brussels Sprouts Exports by Country



Source: GTA



## Fresh Brussels Sprouts Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019
Western Australia	2	26	61
Queensland	9	10	15
Victoria	165	139	140
Tasmania	3	1	-
New South Wales	7	9	29
<b>Other</b>	<b>62</b>	<b>82</b>	<b>121</b>
<b>TOTAL</b>	<b>248</b>	<b>266</b>	<b>365</b>

## Fresh Brussels Sprouts Exports by Country

Exports by country (Tonnes)			
Year Ending June	2017	2018	2019
Singapore	38	38	43
Japan	68	69	71
Malaysia	15	15	13
PNG	1	1	1
Hong Kong	20	26	52
<b>Other</b>	<b>106</b>	<b>118</b>	<b>186</b>
<b>TOTAL</b>	<b>248</b>	<b>266</b>	<b>365</b>

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

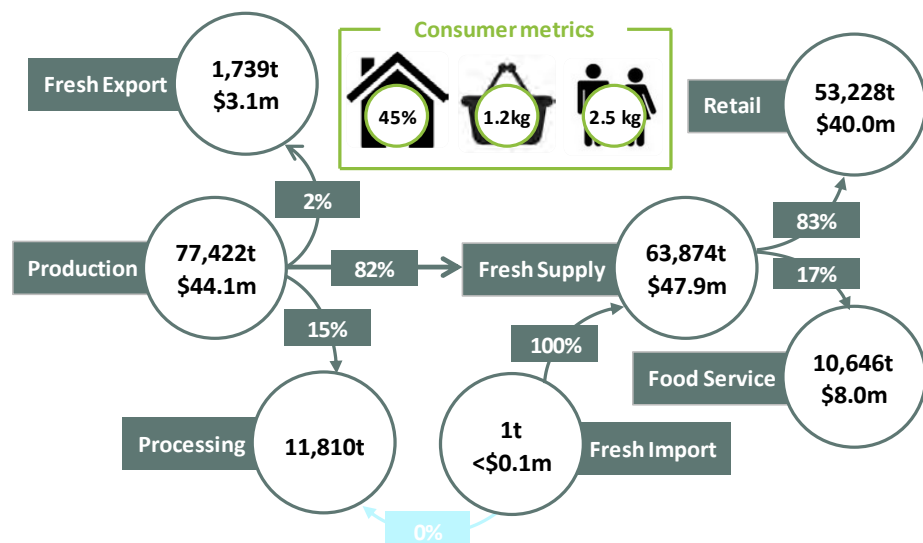
Cabbage production occurs in most states of Australia, with production occurring during the winter months.

For the year ending June 2019:

- **77,422 t** produced and valued at **\$44.1 m** with **15%** sent to processing.
- The wholesale value of the fresh supply was **\$47.9 m**, with **\$40 m** distributed into retail and **\$8 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 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	71,125	75,165	+6%	77,422	+3%
Production (\$m)	\$ 45.0	\$ 41.6	-8%	\$ 44.1	+6%
Production area (Ha)	2,801	2,793	>-1%	-	-
Fresh Export Volume (t)	2,624	1,706	-35%	1,739	+2%
Fresh Export Value (\$m)	\$ 4.6	\$ 3.2	-31%	\$ 3.1	-3%
Fresh Import Volume (t)	<1	8	>100%	1	-87%
Fresh Import Value (\$m)	<\$0.1	<\$0.1	>100%	<\$0.1	-66%
Fresh Supply (t)	57,652	62,001	+8%	63,874	+3%
Fresh Supply Wholesale Value (\$m)	\$ 47.5	\$ 45.0	-5%	\$ 47.9	+7%
Supply per Capita (kg)	2.35	2.49	+6%	2.53	+2%

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

## Major Cabbage Production Areas

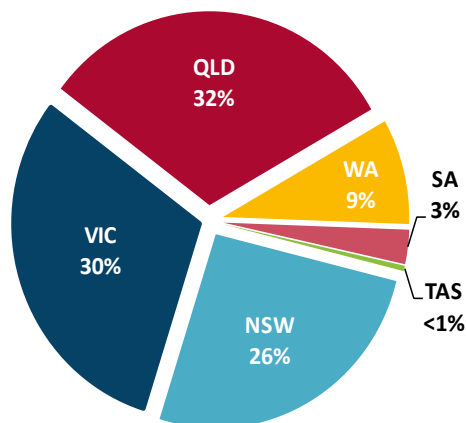
Cabbages are grown across most states of Australia, with the largest producing state being Victoria. The major growing regions include the **Lockyer Valley** in Queensland; the **Sydney region** in New South Wales; and the **Melbourne region** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Cabbages Production by State



Sources: ABS

## Fresh Cabbages Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	20,128												
Victoria	23,515												
Queensland	24,400												
Western Australia	6,817												
South Australia	2,214												
Tasmania	347												
Availability legend		<div>High</div> <div>Medium</div> <div>Low</div> <div>None</div>											

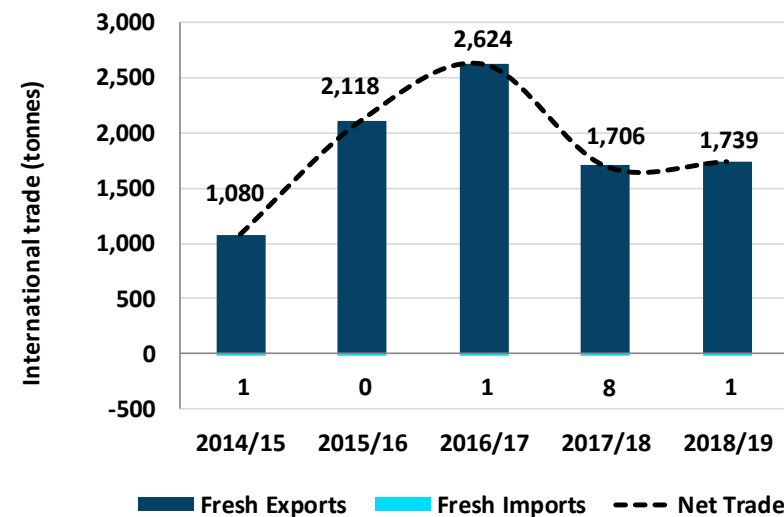
Sources: AUSVEG

## Fresh Cabbages International Trade

Australia is a net exporter of cabbages. For the year ending June 2019, Australia exported **1,739 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.



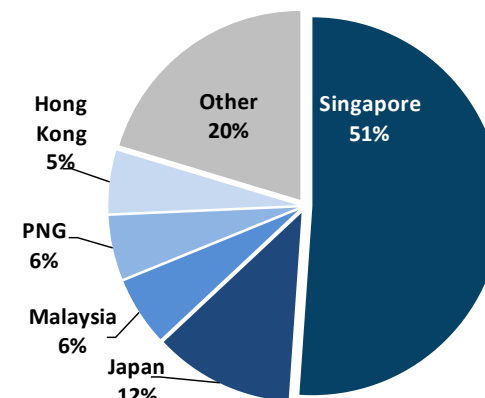
## Net Fresh Cabbages International Trade



Source: GTA

For the year ending June 2019, **51%** of exported fresh cabbages was sent to Singapore, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	1	7	1	Western Australia	409	312	928
New South Wales	< 0.5	2	-	Queensland	1,421	1,112	555
<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>-</b>	Victoria	371	181	168
<b>TOTAL</b>	<b>1</b>	<b>8</b>	<b>1</b>	Tasmania	< 0.5	10	45
				New South Wales	129	84	30
				<b>Other</b>	<b>294</b>	<b>7</b>	<b>13</b>
				<b>TOTAL</b>	<b>2,624</b>	<b>1,707</b>	<b>1,739</b>

## Fresh Cabbages Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	1	6	1	Singapore	992	466	889
Fiji	< 0.5	2	-	Japan	760	460	207
Sth. Korea	-	< 0.5	-	Malaysia	32	58	101
<b>Other</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>-</b>	PNG	131	100	95
<b>TOTAL</b>	<b>1</b>	<b>8</b>	<b>1</b>	Hong Kong	68	34	93
				<b>Other</b>	<b>641</b>	<b>588</b>	<b>354</b>
				<b>TOTAL</b>	<b>2,624</b>	<b>1,707</b>	<b>1,739</b>

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

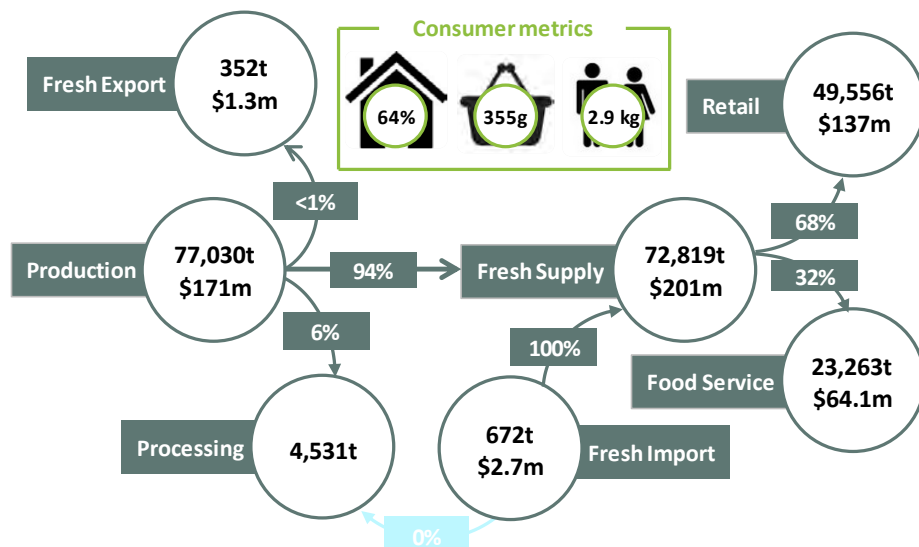
Capsicums, or bell peppers, are grown in most states of Australia. The majority of capsicums are currently grown outdoors in Queensland. However, increasingly capsicums are being grown year-round in high-tech greenhouses in the southern states.

For the year ending June 2019:

- **77,030 t** produced and valued at **\$171 m** with **6%** sent to processing.
- The wholesale value of the fresh supply was **\$201 m**, with **\$137 m** distributed into retail and **\$64.1 m** into food service.
- **64%** of Australian households purchased capsicums, buying an average of **355 g** of capsicums per shopping trip.
- The supply per capita was **2.9 kg**, based on the volume supplied.



## Fresh Capsicums Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	73,488	76,237	+4%	77,030	+1%
Production (\$m)	\$ 172.4	\$ 155.6	-10%	\$ 171.1	+10%
Production area (Ha)	1,758	2,071	+18%	-	-
Fresh Export Volume (t)	346	317	-8%	352	+11%
Fresh Export Value (\$m)	\$ 1.3	\$ 1.2	-10%	\$ 1.3	+6%
Fresh Import Volume (t)	1,374	1,182	-14%	672	-43%
Fresh Import Value (\$m)	\$ 5.4	\$ 4.4	-18%	\$ 2.7	-39%
Fresh Supply (t)	70,193	72,617	+3%	72,819	<1%
Fresh Supply Wholesale Value (\$m)	\$ 204.3	\$ 183.9	-10%	\$ 200.7	+9%
Supply per Capita (kg)	2.86	2.91	+2%	2.89	>-1%

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

## Major Capsicum Production Areas

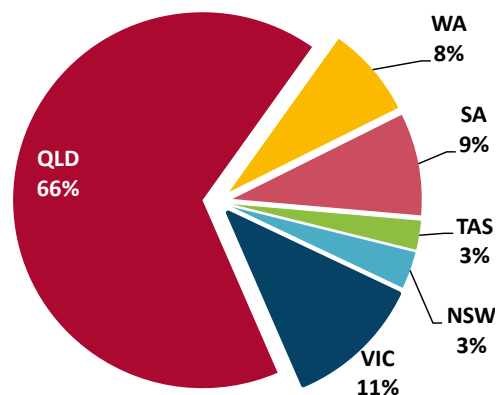
Capsicums are grown across most states of Australia, with the majority of capsicums being grown in Queensland. The major outdoor growing regions include **Bowen** and **Bundaberg** in Queensland; and **Carnarvon** in Western Australia.



Sources: ABS; AUSVEG



## 2018/19 Fresh Capsicums Production by State



Source: ABS

## Fresh Capsicums Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,462												
Victoria	8,794												
Queensland	51,090												
Western Australia	5,994												
South Australia	6,767												
Tasmania	1,923												
Availability legend		<div style="display: flex; justify-content: space-around;"> <span><span style="display: inline-block; width: 10px; height: 10px; background-color: #4F7942; border: 1px solid black;"></span> High</span> <span><span style="display: inline-block; width: 10px; height: 10px; background-color: #7C9A4E; border: 1px solid black;"></span> Medium</span> <span><span style="display: inline-block; width: 10px; height: 10px; background-color: #A8C87D; border: 1px solid black;"></span> Low</span> <span><span style="display: inline-block; width: 10px; height: 10px; background-color: #D9EAD3; border: 1px solid black;"></span> None</span> </div>											

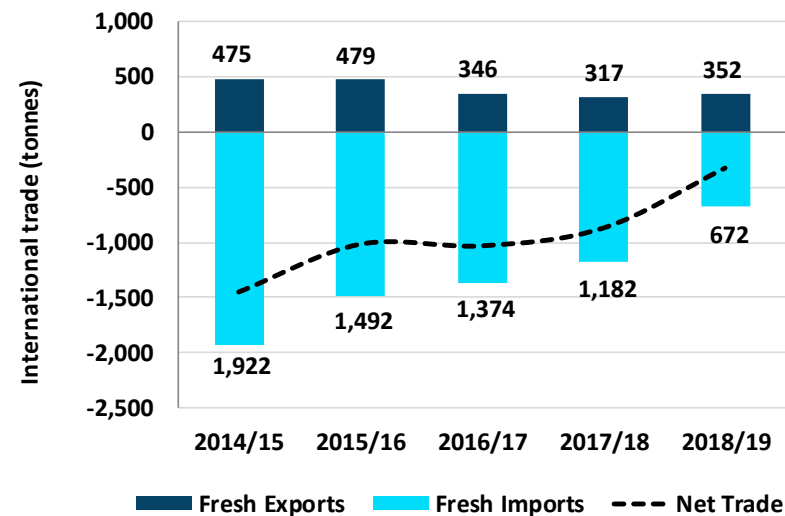
Source: AUSVEG

## 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 **600-2,000 tonnes** every year, predominantly from New Zealand. For the year ending June 2019, Australia imported **352 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

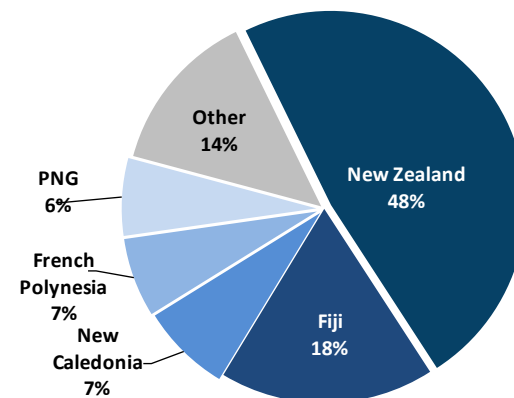
## Net Fresh Capsicums and Chillies International Trade



Source: GTA

For the year ending June 2019, **48%** of exported fresh capsicums/chillies were sent to New Zealand, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	612	562	436	Queensland	327	294	270
Victoria	493	389	98	Victoria	9	13	61
Western Australia	197	162	81	South Australia	2	1	10
Queensland	83	76	62	New South Wales	9	10	6
South Australia	3	5	3	Western Australia	2	1	-
<b>Other</b>	-	< 0.5	-	<b>Other</b>	< 0.5	1	8
<b>TOTAL</b>	<b>1,388</b>	<b>1,194</b>	<b>679</b>	<b>TOTAL</b>	<b>350</b>	<b>321</b>	<b>356</b>

## Fresh Capsicums and Chillies Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
New Zealand	1,308	922	588	New Zealand	201	148	171
India	24	82	58	Fiji	30	41	63
Vietnam	41	98	22	New Caledonia	32	29	27
China	15	90	11	French Polynesia	1	17	23
Mexico	-	2	-	PNG	51	48	23
<b>Other</b>	-	1	0	<b>Other</b>	34	39	48
<b>TOTAL</b>	<b>1,388</b>	<b>1,194</b>	<b>679</b>	<b>TOTAL</b>	<b>350</b>	<b>321</b>	<b>356</b>

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

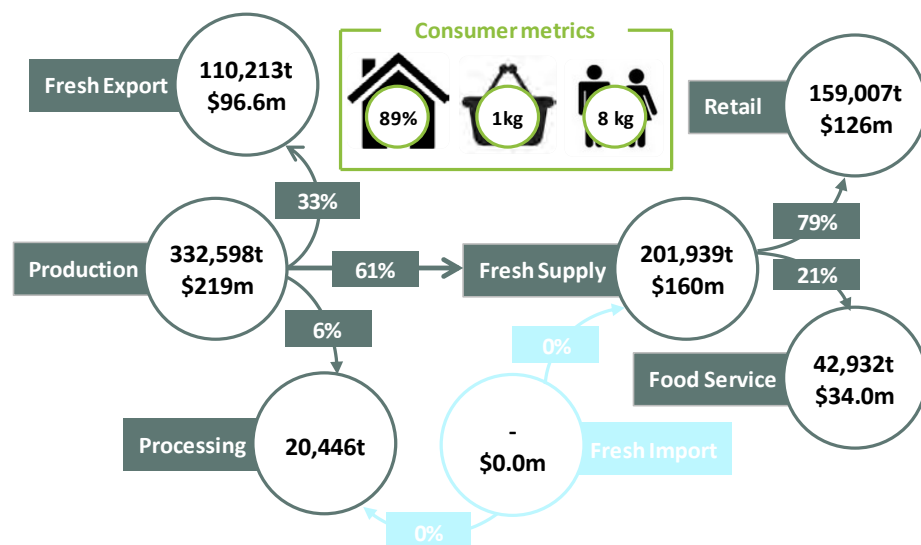
Carrot production occurs primarily in the southern states of Australia, with a large volume of carrots grown for the export market in Western Australia.

For the year ending June 2019:

- **332,598 t** produced and valued at **\$219 m** with **6%** sent to processing.
- The wholesale value of the fresh supply was **\$160 m**, with **\$126 m** distributed into retail and **\$34 m** into food service.
- **89%** of Australian households purchased carrots, buying an average of **1 kg** of carrots per shopping trip.
- The supply per capita was **8 kg**, based on the volume supplied.



## Fresh Carrots Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	318,198	330,652	+4%	332,598	<1%
Production (\$m)	\$ 231.3	\$ 215.7	-7%	\$ 219.3	+2%
Production area (Ha)	5,785	5,628	-3%	-	-
Fresh Export Volume (t)	102,937	108,172	+5%	110,213	+2%
Fresh Export Value (\$m)	\$ 90.8	\$ 94.6	+4%	\$ 96.6	+2%
Fresh Import Volume (t)	10	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	195,710	202,153	+3%	201,939	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 179.8	\$ 157.8	-12%	\$ 160.0	+1%
Supply per Capita (kg)	7.98	8.11	+2%	8.01	-1%

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

## Major Carrot Production Areas

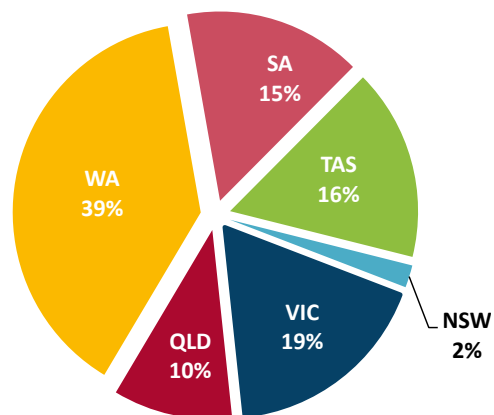
Major carrot production areas include **Gingin** and **Preston** in Western Australia; the **Riverland** region of South Australia; **East Gippsland** in Victoria; and **Forth** in Tasmania.



Source: AUSVEG



## 2017/18 Fresh Carrot Production by State



Source: AUSVEG

## Fresh Carrots Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	6,371												
Victoria	58,230												
Queensland	34,137												
Western Australia	128,430												
South Australia	50,919												
Tasmania	54,510												
Availability legend		High		Medium		Low		None					

Source: AUSVEG

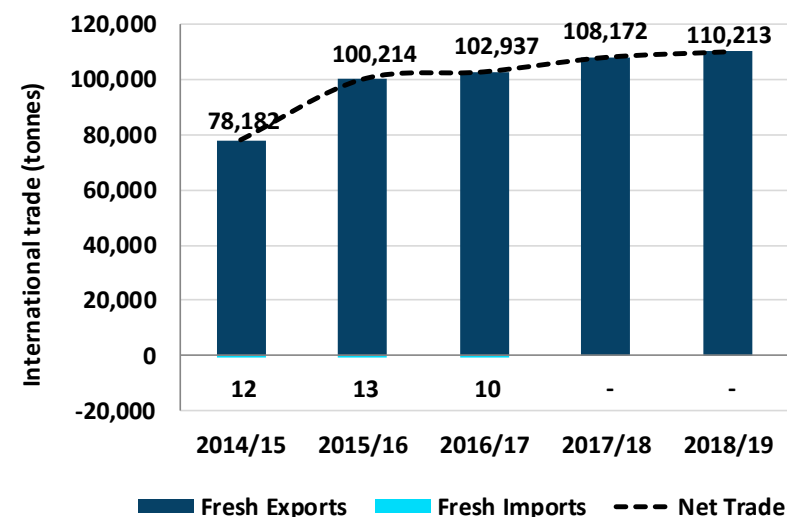


## Fresh Carrots and Turnips International Trade

Note: Trade data combines fresh carrots and turnips.

Australia is a net exporter of carrots and turnips, typically exporting between **80,000-110,000 tonnes** every year, predominantly from Western Australia. For the year ending June 2019, Australia exported **110,213 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

## Net Fresh Carrots and Turnips International Trade



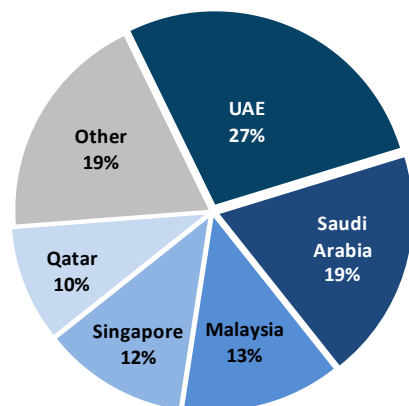
Source: GTA





For the year ending June 2019, **27%** of exported fresh carrots/turnips were sent to the United Arab Emirates (UAE), as profiled in the chart below.

### 2018/19 Fresh Carrots and Turnips Exports by Country



Source: GTA

### Fresh Carrots and Turnips Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	10	-	-	Western Australia	88,326	96,111	98,508
<b>TOTAL</b>	<b>10</b>	<b>-</b>	<b>-</b>	Tasmania	6,989	8,590	6,709
				Queensland	2,618	1,686	2,632
				Victoria	4,211	1,019	1,794
				South Australia	594	581	388
				<b>Other</b>	<b>199</b>	<b>187</b>	<b>182</b>
				<b>TOTAL</b>	<b>102,937</b>	<b>108,175</b>	<b>110,213</b>

### Fresh Carrots and Turnips Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	10	-	-	UAE	32,096	33,466	30,284
<b>TOTAL</b>	<b>10</b>	<b>-</b>	<b>-</b>	Saudi Arabia	14,743	15,087	21,027
				Malaysia	13,924	14,150	14,450
				Singapore	13,180	13,051	13,061
				Qatar	7,031	9,626	10,460
				<b>Other</b>	<b>21,963</b>	<b>22,794</b>	<b>20,931</b>
				<b>TOTAL</b>	<b>102,937</b>	<b>108,175</b>	<b>110,213</b>

Source: GTA





## Fresh Cauliflowers Overview

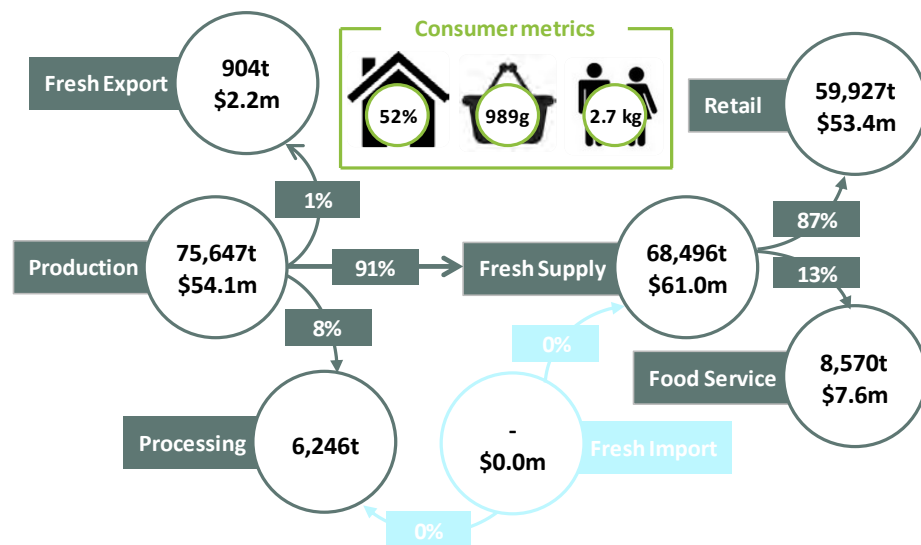
Cauliflower production occurs across most states in Australia, with production occurring during the winter months.

For the year ending June 2019:

- **75,647 t** produced and valued at **\$54.1 m** with **8%** sent to processing.
- The wholesale value of the fresh supply was **\$61.0 m**, with **\$53.4 m** distributed into retail and **\$7.6 m** into food service.
- **52%** of Australian households purchased cauliflowers, buying an average of **989 g** of cauliflowers per shopping trip.
- The supply per capita was **2.7 kg**, based on the volume supplied.



## Fresh Cauliflowers Supply Chain—Year Ending June 2019



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

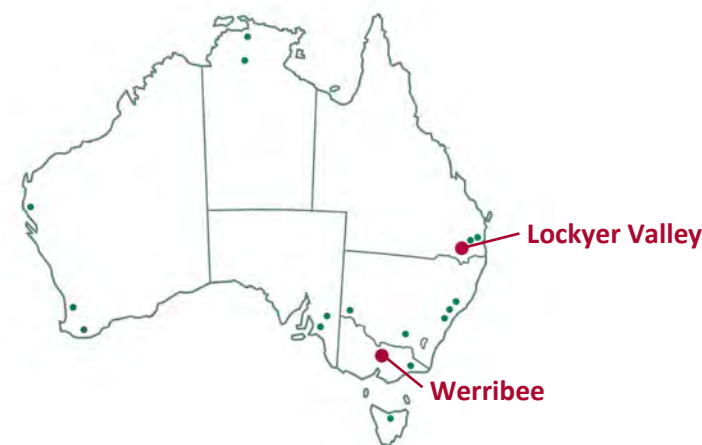


Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	67,703	74,146	+10%	75,647	+2%
Production (\$m)	\$ 52.9	\$ 47.4	-10%	\$ 54.1	+14%
Production area (Ha)	3,400	3,309	-3%	-	-
Fresh Export Volume (t)	683	799	+17%	904	+13%
Fresh Export Value (\$m)	\$ 1.7	\$ 1.8	+5%	\$ 2.2	+22%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	61,430	67,224	+9%	68,496	+2%
Fresh Supply Wholesale Value (\$m)	\$ 60.0	\$ 53.5	-11%	\$ 61.0	+14%
Supply per Capita (kg)	2.51	2.70	+8%	2.72	<1%

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

## Major Cauliflower Production Areas

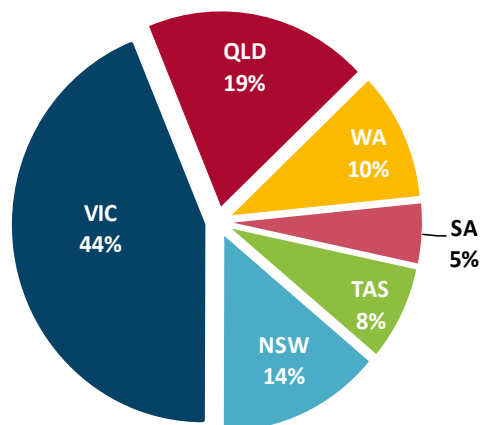
Cauliflower is grown in most states of Australia, with the largest producing states being Victoria and Queensland. The major growing regions include the **Lockyer Valley** in Queensland and **Werribee** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Cauliflowers Production by State



Source: ABS

## Fresh Cauliflowers Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	10,540												
Victoria	33,080												
Queensland	14,448												
Western Australia	7,980												
South Australia	3,730												
Tasmania	5,868												
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 260-262.*



## 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

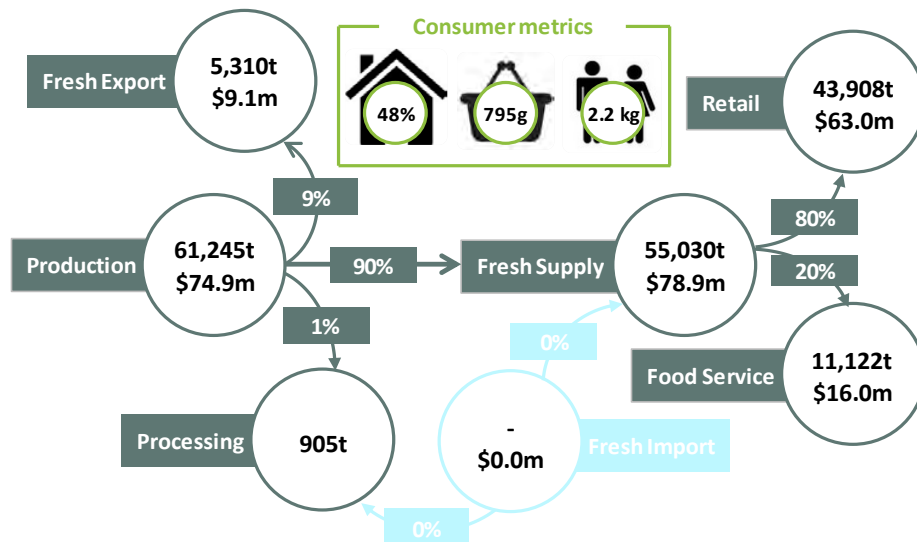
Celery is grown in most states of Australia, with the majority of production occurring in Victoria. Most of the celery grown in Australia is destined for the fresh local market, with a small but growing fresh export market.

For the year ending June 2019:

- **61,245 t** produced and valued at **\$74.9 m** with **1%** sent to processing.
- The wholesale value of the fresh supply was **\$78.9 m**, with **\$63 m** distributed into retail and **\$16 m** into food service.
- **48%** of Australian households purchased celery, buying an average of **795 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 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	62,100	65,240	+5%	61,245	-6%
Production (\$m)	\$ 59.6	\$ 60.2	+1%	\$ 74.9	+24%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,872	4,504	+16%	5,310	+18%
Fresh Export Value (\$m)	\$ 6.2	\$ 7.1	+15%	\$ 9.1	+28%
Fresh Import Volume (t)	<1	-	-100%	-	-
Fresh Import Value (\$m)	<\$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	57,311	59,772	+4%	55,030	-8%
Fresh Supply Wholesale Value (\$m)	\$ 63.8	\$ 63.6	>-1%	\$ 78.9	+24%
Supply per Capita (kg)	2.34	2.40	+3%	2.18	-9%

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

## Major Celery Production Areas

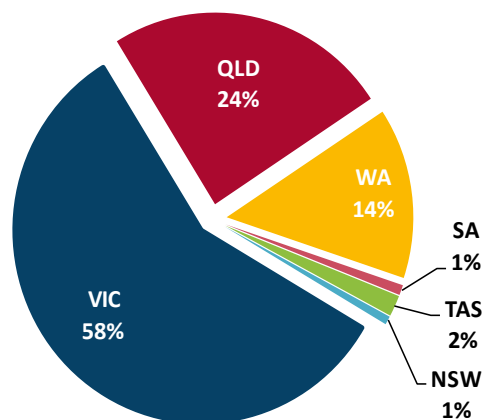
Celery is grown across most states of Australia, with the majority of celery being grown in Victoria. The major outdoor growing regions include the **Dandenong region** in Victoria; as well as the **Perth region** of Western Australia; and **Stanthorpe** and the **Darling Downs** in the Granite Belt region of southern Queensland.



Source: AUSVEG



## 2018/19 Fresh Celery Production by State



Source: AUSVEG

## Fresh Celery Seasonality by State

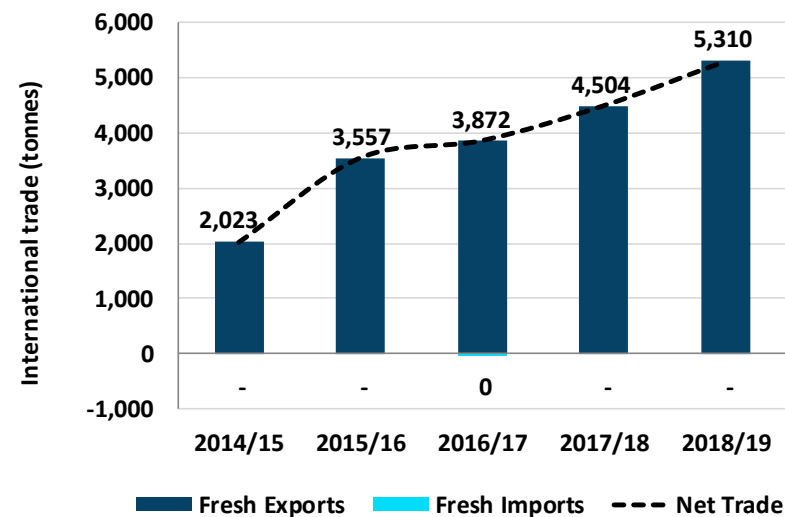
State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	438												
Victoria	35,332												
Queensland	15,025												
Western Australia	8,832												
South Australia	525												
Tasmania	1,092												
Availability legend			High		Medium		Low						None

Source: AUSVEG

## Fresh Celery International Trade

Australia is a net exporter of celery, with exports growing in recent years. For the year ending June 2019, Australia exported **5,310 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

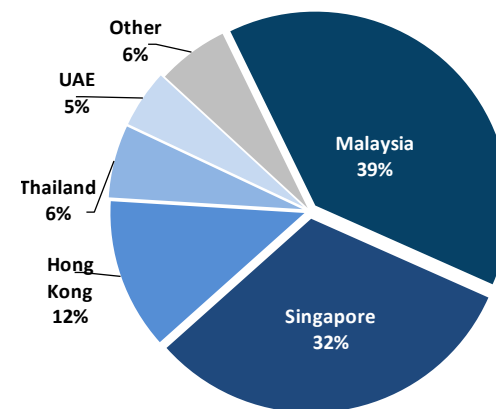
## Net Fresh Celery International Trade



Source: GTA

## 2018/19 Fresh Celery Exports by Country

For the year ending June 2019, **39%** of exported fresh celery was sent to Malaysia, as profiled in the chart below.



Source: GTA





## Fresh Celery Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	< 0.5	-	-	Western Australia	1,687	2,777	2,678
<b>Other</b>	<b>&lt; 0.5</b>	-	-	Victoria	1,830	1,488	2,376
<b>TOTAL</b>	<b>0</b>	-	-	Queensland	170	144	132
				New South Wales	152	83	105
				South Australia	2	12	18
				<b>Other</b>	<b>30</b>	-	<b>1</b>
				<b>TOTAL</b>	<b>3,872</b>	<b>4,504</b>	<b>5,310</b>

## Fresh Celery Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
India	< 0.5	-	-	Malaysia	1,902	1,799	2,065
<b>Other</b>	<b>&lt; 0.5</b>	-	-	Singapore	1,223	1,908	1,685
<b>TOTAL</b>	<b>0</b>	-	-	Hong Kong	130	148	668
				Thailand	36	39	321
				UAE	288	415	256
				<b>Other</b>	<b>292</b>	<b>195</b>	<b>315</b>
				<b>TOTAL</b>	<b>3,872</b>	<b>4,504</b>	<b>5,310</b>

Source: GTA





## Fresh Chillies Overview

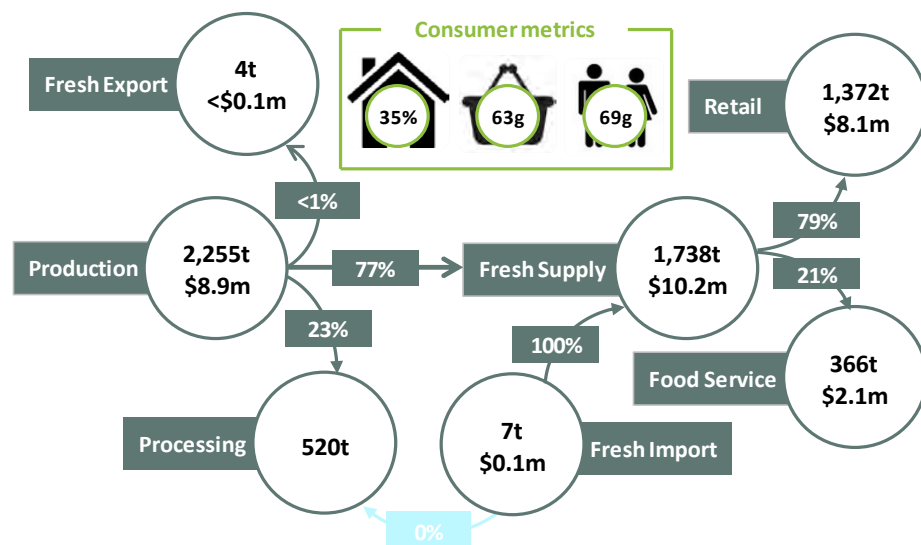
Chillies are grown in most states of Australia. The majority of chillies are currently grown in Queensland.

For the year ending June 2019:

- **2,255 t** produced and valued at **\$8.9 m** with **23%** sent to processing.
- The wholesale value of the fresh supply was **\$10.2 m**, with **\$8.1 m** distributed into retail and **\$2.1 m** into food service.
- **35%** of Australian households purchased chillies, buying an average of **63 g** of chillies per shopping trip.
- The supply per capita was **69 g**, based on the volume supplied.



## Fresh Chillies Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,213	2,246	+1%	2,255	<1%
Production (\$m)	\$ 9.4	\$ 9.1	-4%	\$ 8.9	-2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3	3	-8%	4	+11%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-10%	< \$0.1	+6%
Fresh Import Volume (t)	14	12	-14%	7	-43%
Fresh Import Value (\$m)	\$ 0.2	\$ 0.2	-18%	\$ 0.1	-39%
Fresh Supply (t)	1,713	1,737	+1%	1,738	<1%
Fresh Supply Wholesale Value (\$m)	\$ 10.8	\$ 10.4	-4%	\$ 10.2	-2%
Supply per Capita (kg)	0.07	0.07	>-1%	0.07	-1%

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

## Major Chilli Production Areas

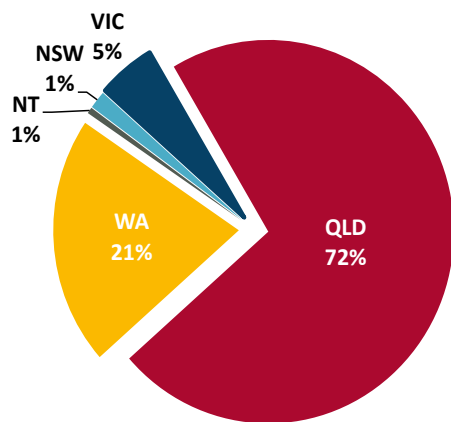
Chillies are grown across most states of Australia, with the majority of chillies being grown in Queensland. The major growing regions include **Bowen** and **Bundaberg** in Queensland; **Carnarvon** in Western Australia; and **Mildura** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Chillies Production by State



Source: AUSVEG

## Fresh Chillies Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	34												
Victoria	112												
Queensland	1,623												
Western Australia	473												
Northern Territory	12												
Availability legend			High		Medium		Low					None	

Source: AUSVEG

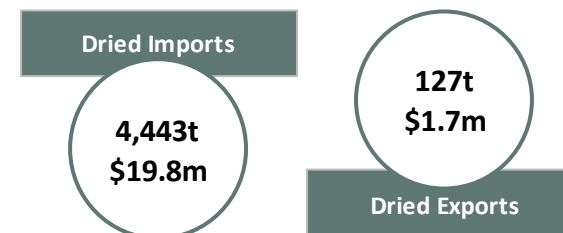
## Fresh Chillies International Trade

Note: Trade data combines fresh capsicums and chillies. For this combined analysis see pages 278-280.



## Processed Chillies International Trade

For the year ending June 2019, an additional **4,443 tonnes** of dried chillies were imported, while **127 tonnes** were exported.



Source: GTA





## Fresh Cucumbers Overview

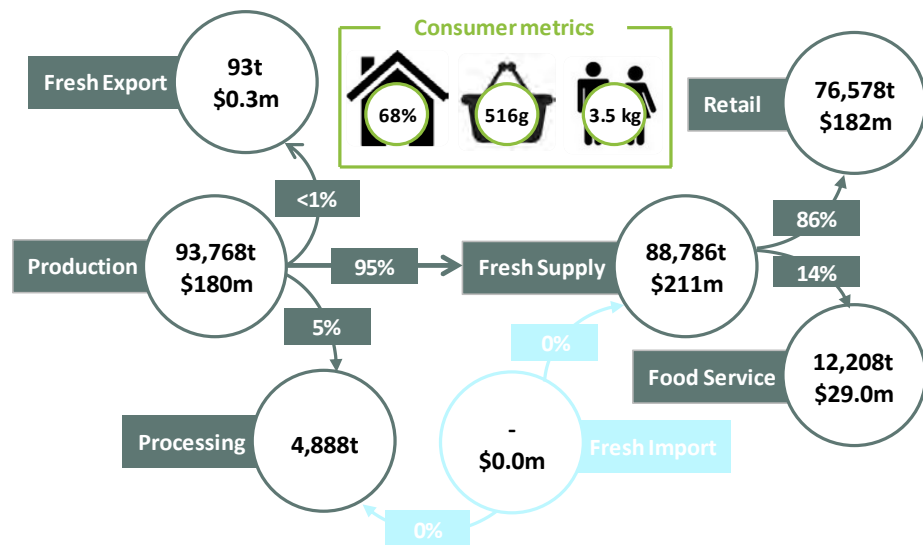
The majority of cucumber production currently occurs in protected cropping, either covered or increasingly in high-tech glasshouses.

For the year ending June 2019:

- **93,768 t** produced and valued at **\$180 m** with **5%** sent to processing.
- The wholesale value of the fresh supply was **\$211 m**, with **\$182 m** distributed into retail and **\$29 m** into food service.
- **68%** of Australian households purchased cucumbers, buying an average of **516 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 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	87,776	91,084	+4%	93,768	+3%
Production (\$m)	\$ 182.1	\$ 157.3	-14%	\$ 180.3	+15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	105	134	+28%	93	-30%
Fresh Export Value (\$m)	\$ 0.4	\$ 0.4	+3%	\$ 0.3	-15%
Fresh Import Volume (t)	<1	-	-100%	-	-
Fresh Import Value (\$m)	<\$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	83,096	86,202	+4%	88,786	+3%
Fresh Supply Wholesale Value (\$m)	\$ 213.2	\$ 184.0	-14%	\$ 211.0	+15%
Supply per Capita (kg)	3.39	3.46	+2%	3.52	+2%

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

## Major Cucumber Production Areas

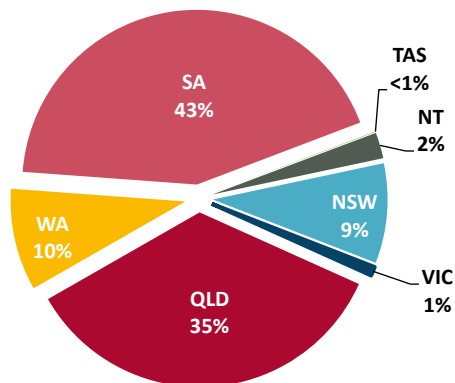
The majority of cucumbers are grown in protected cropping environments in Australia. Currently the largest producers are in **Bowen** and **Bundaberg** in Queensland, and the **Riverland region** in South Australia.



Source: AUSVEG



## 2018/19 Fresh Cucumbers Production by State



Source: AUSVEG

## Fresh Cucumbers Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,654												
Victoria	780												
Queensland	32,819												
Western Australia	8,848												
South Australia	40,370												
Tasmania	46												
Northern Territory	2,250												
Availability legend		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 **59%** of fresh production for the year ending June 2019.

**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 **9%** 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.

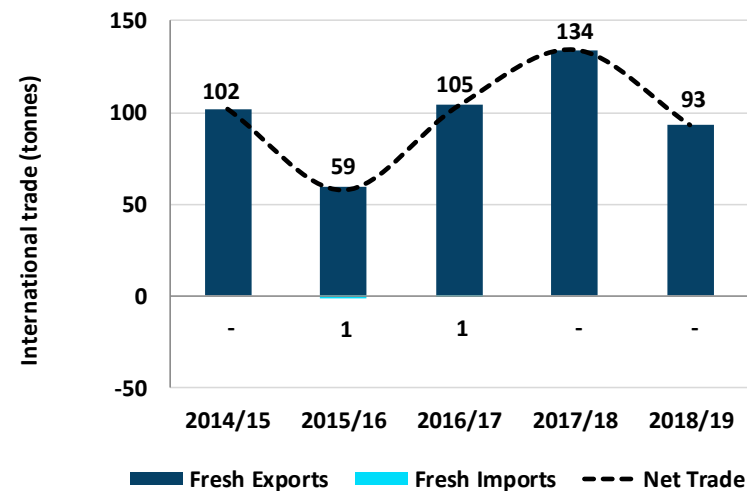
Variety	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Continental	54,560												
Lebanese	29,068												
Baby	9,202												
<b>Other</b>	<b>938</b>												
Availability legend		High		Medium		Low				None			

Source: AUSVEG

## Fresh Cucumbers International Trade

Australia is a net exporter of fresh cucumbers, typically exporting **100-150 tonnes** every year. For the year ending June 2019, Australia exported **93 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Cucumbers International Trade



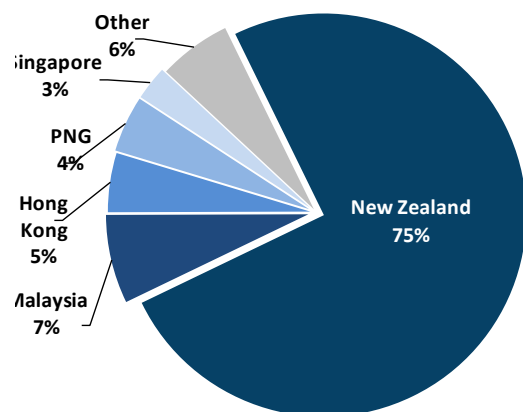
Source: GTA





For the year ending June 2019, **75%** of exported fresh cucumbers were sent to New Zealand, as profiled in the chart below.

## 2018/19 Fresh Cucumbers Exports by Country



Source: GTA

## Fresh Cucumbers Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Western Australia	1	-	-	Queensland	93	119	79
<b>TOTAL</b>	<b>1</b>	<b>-</b>	<b>-</b>	New South Wales	6	10	10
				Victoria	3	3	2
				Western Australia	2	1	1
				South Australia	1	< 0.5	1
				<b>Other</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>-</b>
				<b>TOTAL</b>	<b>105</b>	<b>134</b>	<b>93</b>

## Fresh Cucumbers Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Belgium	1	-	-	New Zealand	61	89	70
<b>TOTAL</b>	<b>1</b>	<b>-</b>	<b>-</b>	Malaysia	5	5	7
				Hong Kong	2	3	4
				PNG	12	10	4
				Singapore	7	13	3
				<b>Other</b>	<b>17</b>	<b>13</b>	<b>5</b>
				<b>TOTAL</b>	<b>105</b>	<b>134</b>	<b>93</b>

Source: GTA





## Fresh Eggplants Overview

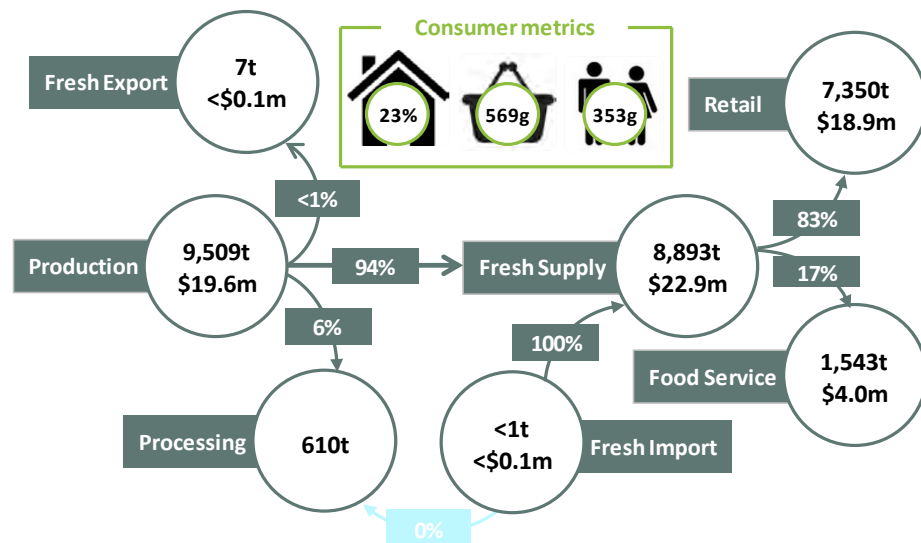
Eggplants are grown in most states of Australia, with the majority of production occurring along the east coast. Currently, most eggplants are grown outdoors. However, increasing volumes are being grown year-round in high-tech greenhouses in the southern states.

For the year ending June 2019:

- **9,509 t** produced and valued at **\$19.6 m** with **6%** sent to processing.
- The wholesale value of the fresh supply was **\$22.9 m**, with **\$18.9 m** distributed into retail and **\$4 m** into food service.
- **23%** of Australian households purchased eggplants, buying an average of **569 g** of eggplants per shopping trip.
- The supply per capita was **353 g**, based on the volume supplied.



## Fresh Eggplants Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,028	9,043	<1%	9,509	+5%
Production (\$m)	\$ 14.9	\$ 17.5	+18%	\$ 19.6	+12%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	10	10	-4%	7	-30%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-16%	< \$0.1	-7%
Fresh Import Volume (t)	-	<1	-	<1	+60%
Fresh Import Value (\$m)	\$ -	< \$0.1	-	< \$0.1	>100%
Fresh Supply (t)	8,439	8,454	<1%	8,893	+5%
Fresh Supply Wholesale Value (\$m)	\$ 17.4	\$ 20.5	+18%	\$ 22.9	+12%
Supply per Capita (kg)	0.34	0.34	-2%	0.35	+4%

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

## Major Eggplant Production Areas

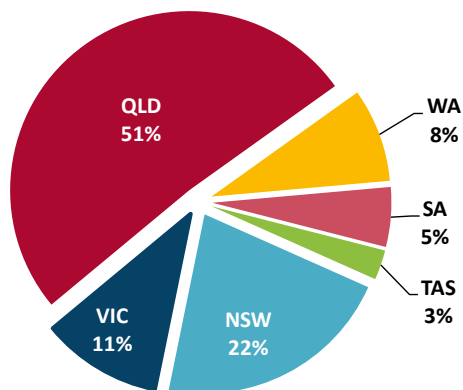
Eggplants are grown around Australia. The major production regions include: the **Bowen/Budekin** region and **Bundaberg** in Queensland; the **Sydney region** in New South Wales; and the **Goulburn Valley** region in Victoria.



Source: AUSVEG



## 2018/19 Fresh Eggplants Production by State



Source: AUSVEG

## Fresh Eggplants Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	2,048												
Victoria	1,024												
Queensland	4,864												
Western Australia	805												
South Australia	512												
Tasmania	256												
Availability legend		High		Medium		Low		None					

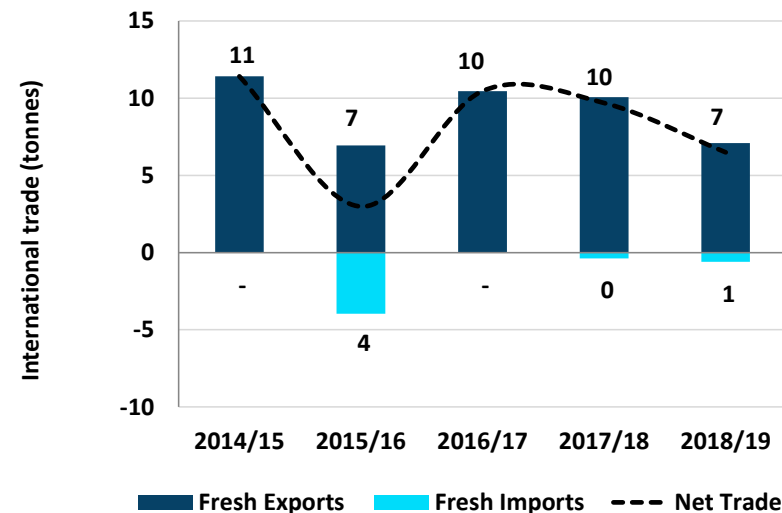
Source: AUSVEG

## Fresh Eggplants International Trade

There is minimal trade of eggplants, with Australia typically exporting less than 20 tonnes each year. For the year ending June 2019, Australia **exported 7 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



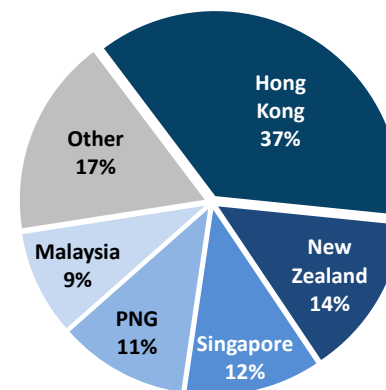
## Net Fresh Eggplant International Trade



Source: GTA

For the year ending June 2019, **37%** of exported fresh eggplants were sent to Hong Kong, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Queensland	-	-	1	Victoria	2	1	2
New South Wales	-	< 0.5	-	New South Wales	-	< 0.5	2
<b>Other</b>	-	< 0.5	-	Queensland	9	4	2
<b>TOTAL</b>	-	0	1	South Australia	-	3	1
				Western Australia	< 0.5	< 0.5	-
				<b>Other</b>	< 0.5	2	< 0.5
				<b>TOTAL</b>	10	10	7

## Fresh Eggplants Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
India	-	< 0.5	1	Hong Kong	< 0.5	4	3
<b>Other</b>	-	< 0.5	-	Malaysia	6	1	2
<b>TOTAL</b>	-	0	1	Nauru	< 0.5	1	1
				New Caledonia	-	1	< 0.5
				Singapore	2	1	< 0.5
				<b>Other</b>	2	3	1
				<b>TOTAL</b>	10	10	7

Source: GTA



## Fresh English Spinach/ Silverbeet/Kale Overview

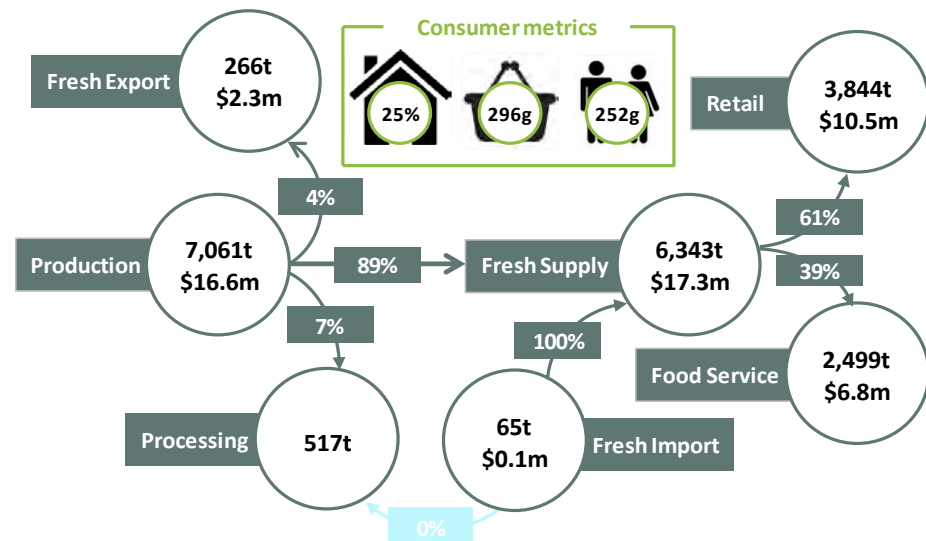
This section combines information on **English spinach**, **silverbeet** and **kale**. These categories are produced in most states of Australia.

For the year ending June 2019:

- **7,061 t** produced and valued at **\$16.6 m** with **7%** sent to processing.
- The wholesale value of the fresh supply was **\$17.3 m**, with **\$10.5 m** distributed into retail and **\$6.8 m** into food service.
- **25%** of Australian households purchased these categories, buying an average of **296 g** of English spinach, silverbeet and kale per shopping trip.
- The supply per capita was **252 g**, based on the volume supplied.



### Fresh English Spinach/Silverbeet/Kale Supply Chain—Year Ending June 2019



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

Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,205	7,028	-2%	7,061	<1%
Production (\$m)	\$ 20.4	\$ 19.3	-5%	\$ 16.6	-14%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	166	243	+46%	266	+10%
Fresh Export Value (\$m)	\$ 1.4	\$ 2.0	+39%	\$ 2.3	+18%
Fresh Import Volume (t)	-	31	-	65	>100%
Fresh Import Value (\$m)	\$ -	< \$0.1	-	\$ 0.1	>100%
Fresh Supply (t)	6,512	6,302	-3%	6,343	<1%
Fresh Supply Wholesale Value (\$m)	\$ 22.4	\$ 20.8	-7%	\$ 17.3	-17%
Supply per Capita (kg)	0.27	0.25	-5%	0.25	>-1%

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

## Major English Spinach/Silverbeet/Kale Production Areas

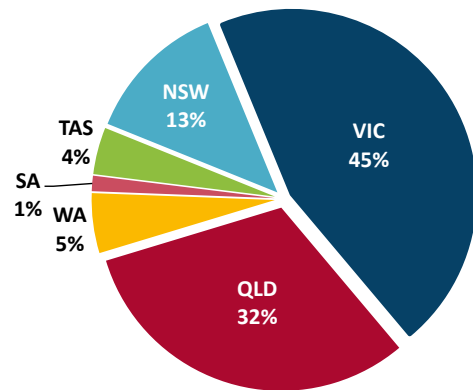
English spinach, silverbeet and kale is grown around Australia. The major production regions include the **Lockyer Valley** in Queensland; and the **Sunraysia region** in Victoria.



Source: AUSVEG



### 2018/19 Fresh English Spinach/Silverbeet/Kale Production by State



Source: AUSVEG

### Fresh English Spinach/Silverbeet/Kale Seasonality by State

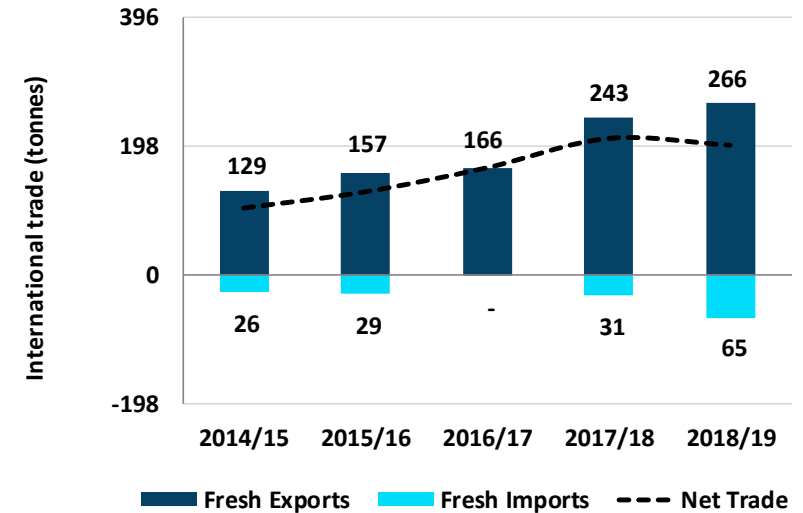
State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	895												
Victoria	3,182												
Queensland	2,222												
Western Australia	373												
South Australia	96												
Tasmania	293												
Imported	65												
Availability legend		High		Medium		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. There is currently no trade in fresh silverbeet. For the year ending June 2019, Australia exported **266 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

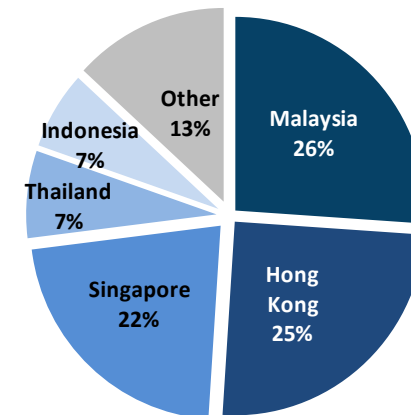
### Net Fresh English Spinach International Trade



Source: GTA

For the year ending June 2019, **26%** of exported fresh English spinach was sent to Malaysia, as profiled in the chart below.

### 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	-	31	65	Victoria	114	130	162
<b>TOTAL</b>	-	<b>31</b>	<b>65</b>	Western Australia	7	75	49
				Queensland	18	21	30
				New South Wales	27	16	20
				South Australia	< 0.5	< 0.5	< 0.5
				<b>Other</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>5</b>
				<b>TOTAL</b>	<b>166</b>	<b>243</b>	<b>266</b>

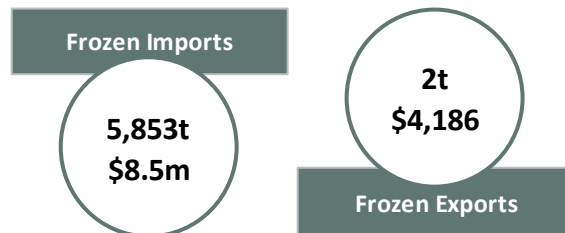
## Fresh English Spinach Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
US	-	31	65	Malaysia	30	82	69
China	-	-	1	Hong Kong	43	45	66
<b>TOTAL</b>	-	<b>31</b>	<b>65</b>	Singapore	48	64	59
				Thailand	14	13	19
				Indonesia	14	15	17
				<b>Other</b>	<b>17</b>	<b>24</b>	<b>35</b>
				<b>TOTAL</b>	<b>166</b>	<b>243</b>	<b>266</b>

Source: GTA

## Processed Spinach International Trade

For the year ending June 2019, an additional **5,853 tonnes** of frozen spinach was imported, while **2 tonnes** were exported.



Source: GTA



## Fresh Herbs Overview

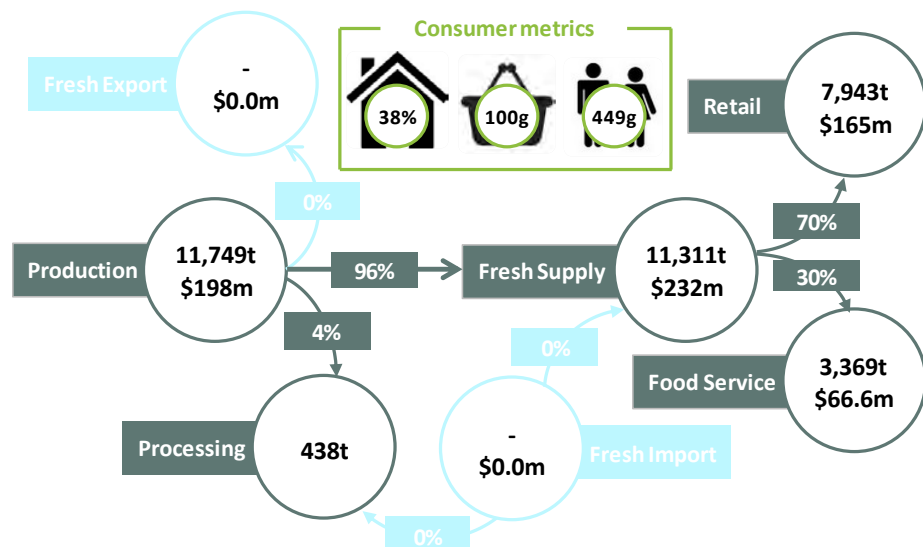
Pages 320-321 profile total fresh herb production and trade. They combine information on fennel, parsley and other fresh herbs. The following pages profile each fresh herb category in more detail.

For the year ending June 2019:

- **11,749 t** produced and valued at **\$198 m** with **4%** sent to processing.
- The wholesale value of the fresh supply was **\$232 m**, with **\$165 m** distributed into retail and **\$66.6 m** into food service.
- **38%** of Australian households purchased a fresh herb, buying an average of **100 g** of fresh herbs per shopping trip.
- The supply per capita was **449 g**, based on the volume supplied.



## Fresh Herbs Supply Chain—Year Ending June 2019



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

Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,367	11,632	+2%	11,749	+1%
Production (\$m)	\$ 155.5	\$ 179.4	+15%	\$ 197.9	+10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	10,941	11,196	+2%	11,311	+1%
Fresh Supply Wholesale Value (\$m)	\$ 182.4	\$ 210.4	+15%	\$ 232.0	+10%
Supply per Capita (kg)	0.45	0.45	<1%	0.45	>-1%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2017/18 edition).





## Fresh Fennel Overview

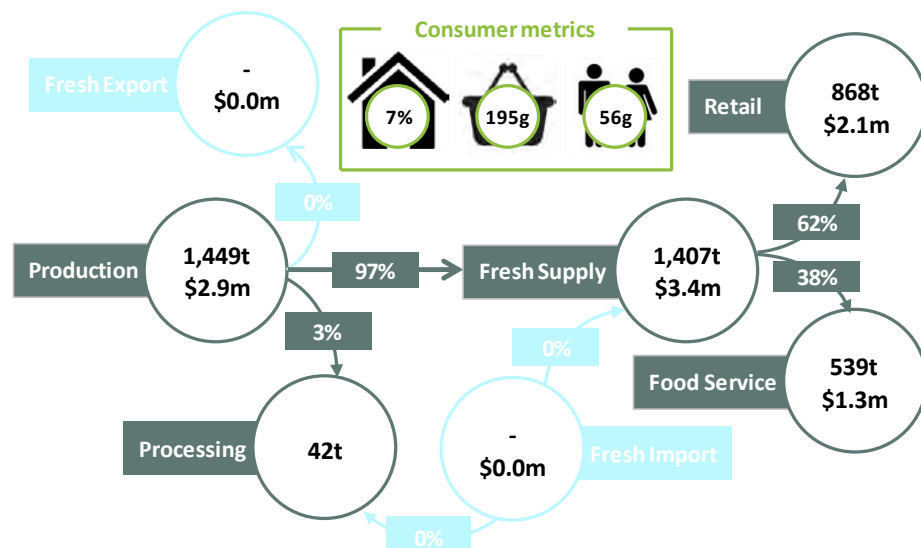
The majority of fennel is grown in Australia, with the majority of production being used in the fresh market.

For the year ending June 2019:

- **1,449 t** produced and valued at **\$2.9 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$3.4 m**, with **\$2.1 m** distributed into retail and **\$1.3 m** into food service.
- **7%** of Australian households purchased fennel, buying an average of **195 g** of fennel per shopping trip.
- The supply per capita was **56 g**, based on the volume supplied.



## Fresh Fennel Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,140	1,257	+10%	1,449	+15%
Production (\$m)	\$ 2.3	\$ 2.5	+10%	\$ 2.9	+15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	1,107	1,221	+10%	1,407	+15%
Fresh Supply Wholesale Value (\$m)	\$ 2.7	\$ 2.9	+10%	\$ 3.4	+15%
Supply per Capita (kg)	0.05	0.05	+8%	0.06	+14%

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

*\*Note: Figures have been modified from those published in the previous edition of the handbook (2017/18 edition).*

## Major Fennel Production Areas

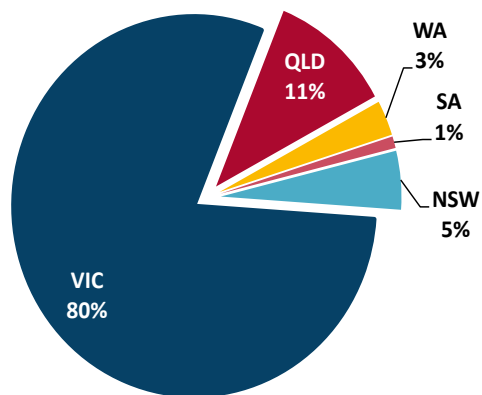
Fennel is grown around Australia. Currently the major production region is the **Werribee region** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Fennel Production by State



Source: AUSVEG

## Fresh Fennel Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	52												
Victoria	827												
Queensland	114												
Western Australia	31												
South Australia	10												
Availability legend			High		Medium			Low				None	

Source: AUSVEG







## Fresh Parsley and other Fresh Herbs Overview

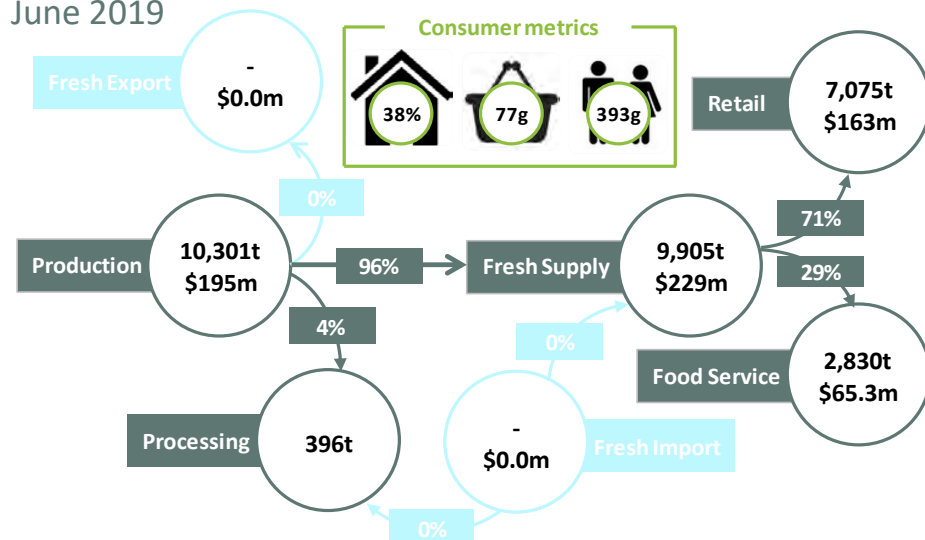
Fresh herbs, including parsley, are grown in most states of Australia, typically in market gardens near the major capitals. Increasingly volumes are being grown year-round in high-tech greenhouses in New South Wales.

For the year ending June 2019:

- **10,301 t** produced and valued at **\$195 m** with **4%** sent to processing.
- The wholesale value of the fresh supply was **\$229 m**, with **\$163 m** distributed into retail and \$65.3 m into food service.
- **38%** of Australian households purchased fresh herbs, buying an average of **77 g** of fresh herbs per shopping trip.
- The supply per capita was **393 g**, based on the volume supplied.



## Fresh Parsley and Other Fresh Herbs Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	10,227	10,374	+1%	10,301	>-1%
Production (\$m)	\$ 153.3	\$ 176.9	+15%	\$ 195.0	+10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	9,834	9,975	+1%	9,905	>-1%
Fresh Supply Wholesale Value (\$m)	\$ 179.7	\$ 207.4	+15%	\$ 228.6	+10%
Supply per Capita (kg)	0.40	0.40	>-1%	0.39	-2%

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

## Major Parsley and other Herbs Production Areas

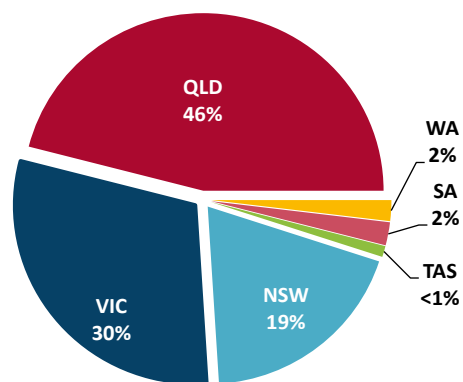
Fresh herbs are grown in most states of Australia, typically in market gardens near the major capitals. Increasingly volumes are being grown year-round in high-tech greenhouses in the New South Wales regions of the **Sydney Basin** and **Northern New South Wales**.



Source: AUSVEG



### 2018/19 Fresh Parsley and other Fresh Herbs Production by State



Source: AUSVEG

### Fresh Parsley and other Fresh Herbs Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	1,957												
Victoria	3,090												
Queensland	4,738												
Western Australia	196												
South Australia	216												
Tasmania	103												
Availability legend			High		Medium		Low						None

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:

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

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

Variety	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Coriander	2,833												
Parsley	2,627												
Basil	1,700												
Mint	927												
Chives	464												
<b>Other</b>	<b>1,751</b>												
Availability legend			High		Medium		Low						None

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

Source: AUSVEG





## Fresh Garlic Overview

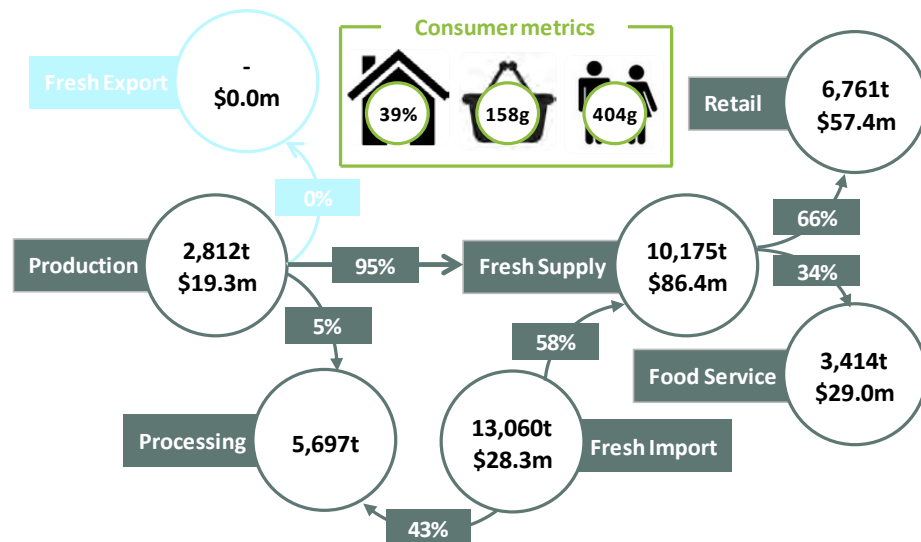
Australia has a small but growing garlic industry, with the majority of current fresh supply being sourced from imports.

For the year ending June 2019:

- **2,812 t** produced and valued at **\$19.3 m** with **5%** sent to processing.
- The wholesale value of the fresh supply was **\$86.4 m**, with **\$57.4 m** distributed into retail and **\$29 m** into food service.
- **39%** of Australian households purchased fresh garlic, buying an average of **158 g** of garlic per shopping trip.
- The supply per capita was **404 g**, based on the volume supplied.



## Fresh Garlic Supply Chain—Year Ending June 2019



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



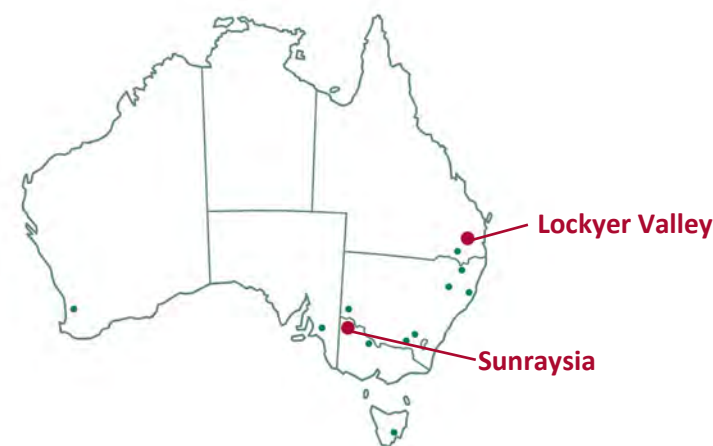
Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,786	2,122	+19%	2,812	+33%
Production (\$m)	\$ 13.1	\$ 15.4	+17%	\$ 19.3	+26%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	94	-	-100%	-	-
Fresh Export Value (\$m)	\$ 0.4	\$ -	-100%	\$ -	-
Fresh Import Volume (t)	12,792	12,224	-4%	13,060	+7%
Fresh Import Value (\$m)	\$ 46.0	\$ 27.5	-40%	\$ 28.3	+3%
Fresh Supply (t)	9,900	9,860	>-1%	10,175	+3%
Fresh Supply Wholesale Value (\$m)	\$ 92.2	\$ 87.8	-5%	\$ 86.4	-2%
Supply per Capita (kg)	0.40	0.40	-2%	0.40	+2%

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

\*Note: Production & Export figures have been modified from those published in the previous edition of the handbook (2017/18 edition).

## Major Garlic Production Areas

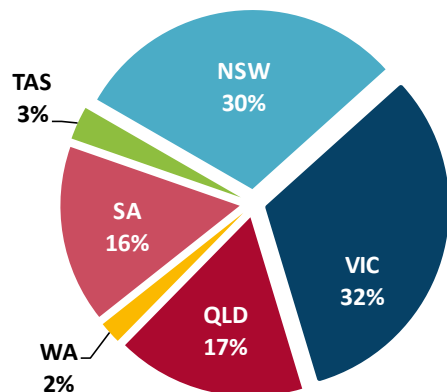
Garlic is grown around Australia. The major production regions include the **Lockyer Valley** in Queensland; and the **Sunraysia** region in Victoria.



Source: AGIA



## 2018/19 Fresh Garlic Production by State



Source: AGIA

## Fresh Garlic Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	603												
Victoria	643												
Queensland	342												
Western Australia	40												
South Australia	321												
Tasmania	60												
Imported	13,060												
Availability legend			High		Medium		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.

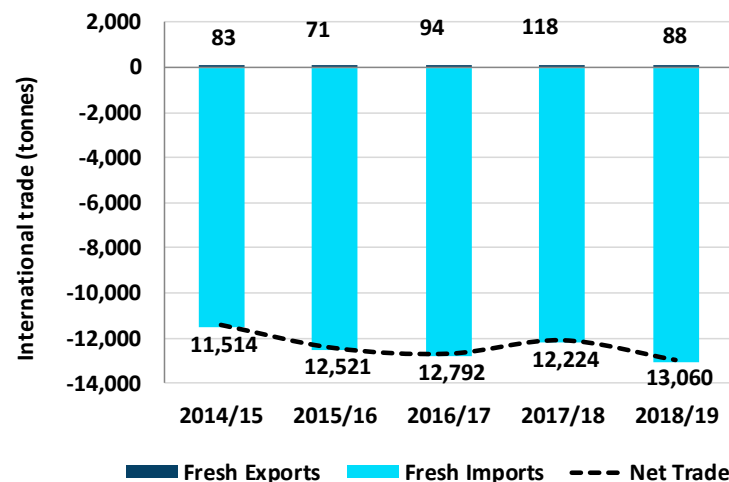
Variety	17/18 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Turban	1,206												
Artichoke	402												
Subtropical	301												
Creole	60												
Marbled Purple Strip	40												
Availability legend			High		Medium		Low						

Source: AGIA

## Fresh Garlic International Trade

Australia is a net importer of fresh garlic importing **13,000 tonnes** annually. For the year ending June 2019, Australia imported **13,060 tonnes** of fresh garlic and exported **88 tonnes**. Garlic exports include re-exports of imported garlic and Australian production accounts for **less than 1%** of total export volumes. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

## Net Fresh Garlic International Trade



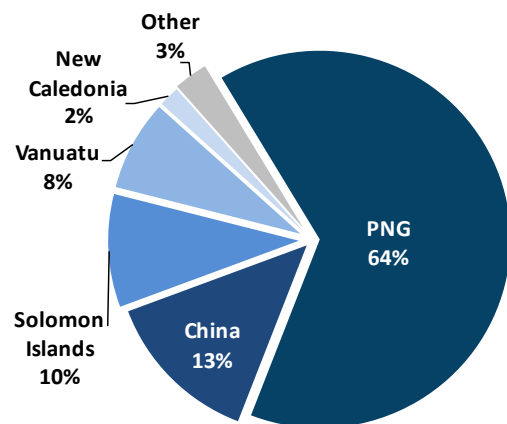
Source: GTA





For the year ending June 2019, **64%** of exported fresh garlic was sent to Papua New Guinea (PNG), as profiled in the chart below.

### 2018/19 Fresh Garlic Exports by Country



Source: GTA

### Fresh Garlic Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	4,732	4,481	5,348	Queensland	48	49	52
Victoria	4,563	4,258	4,654	New South Wales	22	14	17
Queensland	2,093	2,429	1,886	Victoria	8	4	3
Western Australia	1,269	1,022	1,100	South Australia	< 0.5	< 0.5	-
South Australia	135	34	72	Tasmania	< 0.5	< 0.5	-
<b>TOTAL</b>	<b>12,792</b>	<b>12,224</b>	<b>13,060</b>	<b>Other</b>	<b>16</b>	<b>52</b>	<b>17</b>
				<b>TOTAL</b>	<b>94</b>	<b>118</b>	<b>88</b>

### Fresh Garlic Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	8,761	9,422	9,810	PNG	54	54	57
Spain	1,226	1,169	1,491	China	11	49	12
Mexico	1,148	668	589	Solomon Islands	8	9	9
Argentina	677	603	570	Vanuatu	15	3	7
Egypt	592	145	369	New Caledonia	-	-	2
<b>Other</b>	<b>388</b>	<b>217</b>	<b>231</b>	<b>Other</b>	<b>7</b>	<b>3</b>	<b>3</b>
<b>TOTAL</b>	<b>12,792</b>	<b>12,224</b>	<b>13,060</b>	<b>TOTAL</b>	<b>94</b>	<b>118</b>	<b>88</b>

Source: GTA



## Processed Garlic International Trade

For the year ending June 2019, **88 tonnes** of processed garlic was exported.



Source: GTA







## Fresh Ginger Overview

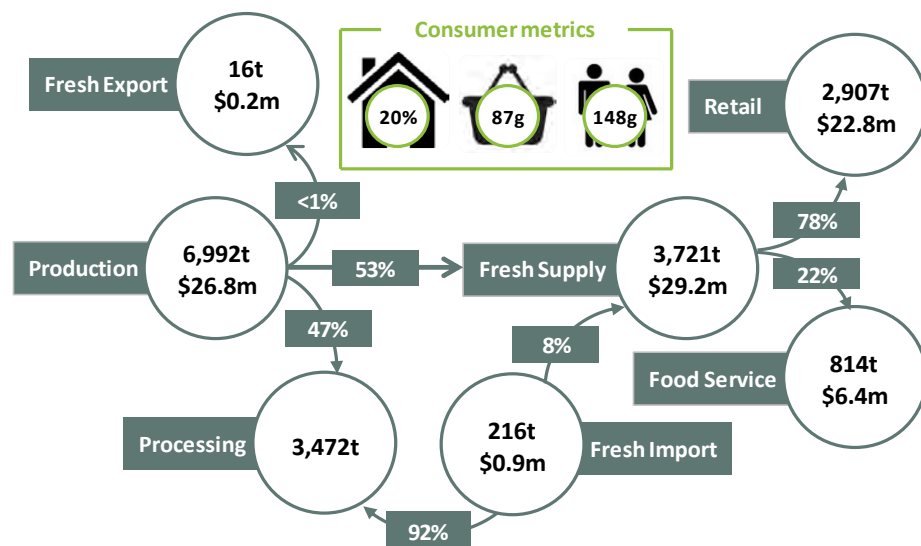
Australian ginger is grown mostly in Queensland. Processed ginger is often minced, candied and used in beverages. Australia imports fresh ginger, but the majority of these fresh imports are processed without entering the fresh supply chain. Fijian ginger has recently been granted access to the Australian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



For the year ending June 2019:

- **6,992 t** produced and valued at **\$26.8 m** with **47%** sent to processing.
- The wholesale value of the fresh supply was **\$29.2 m**, with **\$22.8 m** distributed into retail and **\$6.4 m** into food service.
- **20%** of Australian households purchased fresh ginger, buying an average of **87 g** of ginger per shopping trip.
- The supply per capita was **148 g**, based on the volume supplied.

### Fresh Ginger Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	7,405	7,234	-2%	6,992	-3%
Production (\$m)	\$ 19.8	\$ 48.7	>100%	\$ 26.8	-45%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	17	9	-50%	16	+84%
Fresh Export Value (\$m)	\$ 0.2	\$ 0.1	-33%	\$ 0.2	+34%
Fresh Import Volume (t)	120	224	+86%	216	-3%
Fresh Import Value (\$m)	\$ 0.6	\$ 0.7	+20%	\$ 0.9	+23%
Fresh Supply (t)	3,932	3,857	-2%	3,721	-4%
Fresh Supply Wholesale Value (\$m)	\$ 21.5	\$ 53.3	>100%	\$ 29.2	-45%
Supply per Capita (kg)	0.16	0.15	-4%	0.15	-5%

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

## Major Ginger Production Areas

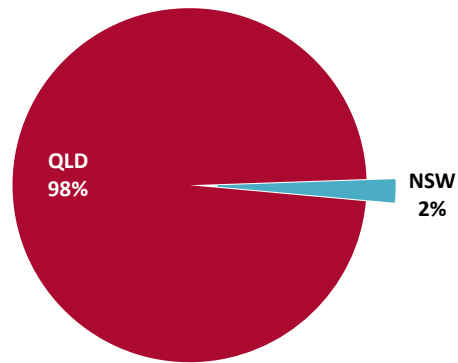
Most ginger is grown in Queensland, with the majority of this production occurring in the **Buderim** region.



Source: AUSVEG



## 2018/19 Fresh Ginger Production by State



Source: AUSVEG

## Fresh Ginger Seasonality by State

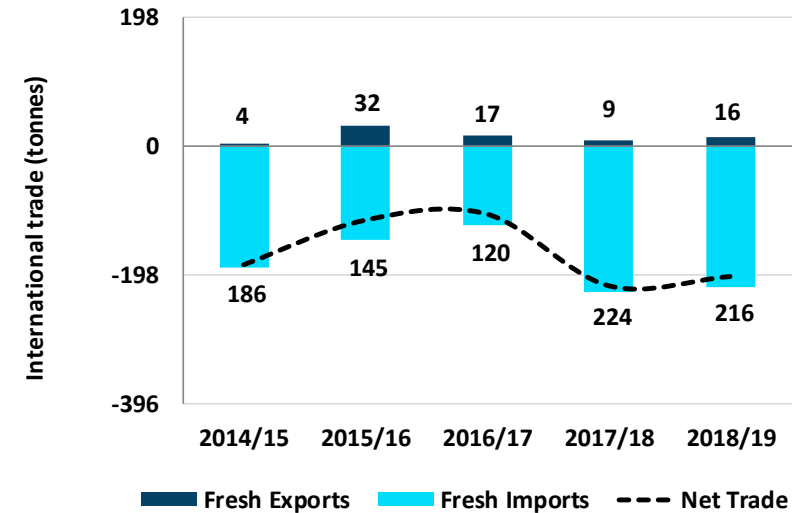
State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	140												
Queensland	6,852												
Imported	216												
Availability legend			High		Medium		Low					None	

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 is profiled in the graph to the right, where imports are counted as negative tonnes.

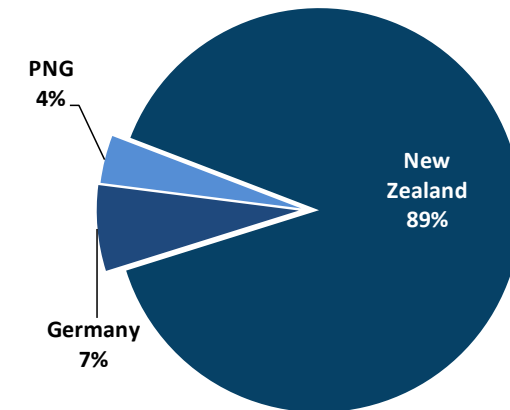
## Net Fresh Ginger International Trade



Source: GTA

For the year ending June 2019, **89%** of exported fresh ginger was sent to New Zealand, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	64	84	94	New South Wales	1	4	13
New South Wales	22	93	86	Queensland	12	< 0.5	2
Queensland	28	30	26	Victoria	-	4	1
Western Australia	5	11	11	<b>Other</b>	<b>4</b>	<b>&lt; 0.5</b>	-
South Australia	1	5	< 0.5	<b>TOTAL</b>	<b>17</b>	<b>9</b>	<b>16</b>
<b>Other</b>	-	<b>0</b>	<b>&lt; 0.5</b>				
<b>TOTAL</b>	<b>120</b>	<b>224</b>	<b>216</b>				

## Fresh Ginger Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	58	78	107	New Zealand	9	7	14
Vietnam	12	71	70	Germany	-	< 0.5	1
Thailand	6	37	20	PNG	< 0.5	< 0.5	1
India	15	8	9	Singapore	< 0.5	< 0.5	< 0.5
Malaysia	11	6	4	Nauru	-	-	< 0.5
<b>Other</b>	<b>19</b>	<b>23</b>	<b>8</b>	<b>Other</b>	<b>8</b>	<b>1</b>	<b>&lt; 0.5</b>
<b>TOTAL</b>	<b>120</b>	<b>224</b>	<b>216</b>	<b>TOTAL</b>	<b>17</b>	<b>9</b>	<b>16</b>

Source: GTA

## Processed Ginger International Trade

For the year ending June 2019, **0.4 tonnes** of preserved ginger was imported, while **675 tonnes** were exported.



Source: GTA





## Fresh Head Lettuce

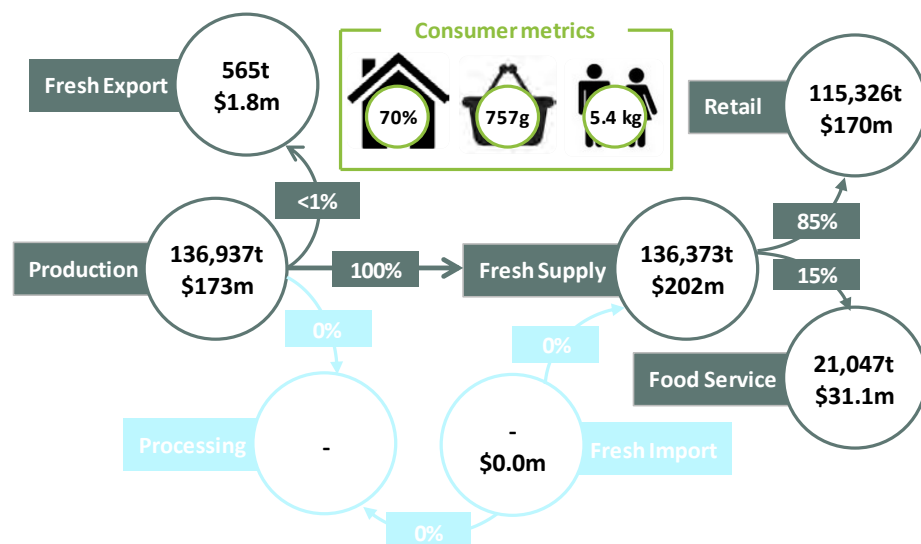
### Overview

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.

For the year ending June 2019:

- **136,937 t** produced and valued at **\$173 m**.
- The wholesale value of the fresh supply was **\$202 m**, with **\$170 m** distributed into retail and **\$31.1 m** into food service.
- **70%** of Australian households purchased head lettuce, buying an average of **757 g** of head lettuce per shopping trip.
- The supply per capita was **5.4 kg**, based on the volume supplied.

### Fresh Head Lettuce Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	128,225	138,485	+8%	136,937	-1%
Production (\$m)	\$ 154.5	\$ 147.1	-5%	\$ 172.8	+17%
Production area (Ha)	8,287	7,784	-6%	-	-
Fresh Export Volume (t)	194	432	>100%	565	+31%
Fresh Export Value (\$m)	\$ 1.3	\$ 1.7	+29%	\$ 1.8	+6%
Fresh Import Volume (t)	<1	-	-100%	-	-
Fresh Import Value (\$m)	<\$0.1	\$ -	-100%	\$ -	-
Fresh Supply (t)	128,031	138,052	+8%	136,373	-1%
Fresh Supply Wholesale Value (\$m)	\$ 180.5	\$ 171.4	-5%	\$ 201.5	+18%
Supply per Capita (kg)	5.22	5.54	+6%	5.41	-2%

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

## Major Head Lettuce Production Areas

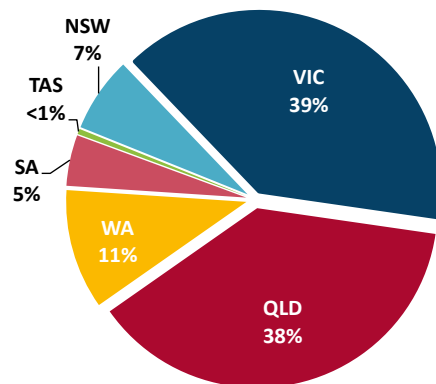
Most head lettuce is grown close to the major population centres, across most states of Australia. Major production regions include the **Lockyer Valley** and **Darling Downs** regions in Queensland; the **Sydney Basin** in New South Wales; and the **Gippsland region** in Victoria.



Sources: AUSVEG



## 2018/19 Fresh Head Lettuce Production by State



Source: ABS

## Fresh Head Lettuce Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	9,261												
Victoria	53,978												
Queensland	51,975												
Western Australia	14,782												
South Australia	6,280												
Tasmania	652												
Availability legend			High		Medium		Low						

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 2019.

**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 loosely headed 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.

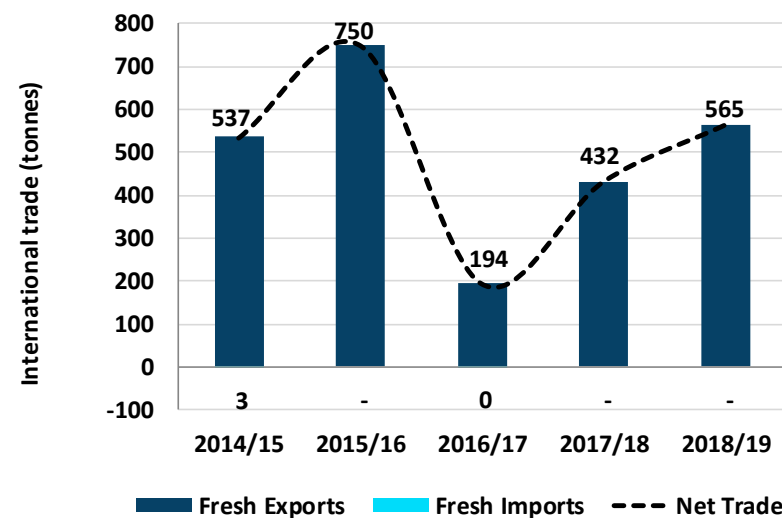
Variety	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Iceberg	102,970												
Cos	27,112												
Oak	5,340												
<b>Other Fancy</b>	<b>1,506</b>												
Availability legend			High		Medium		Low						

Source: AUSVEG

## Fresh Head Lettuce International Trade

Australia has a small trade in head lettuce. For the year ending June 2019, Australia exported **565 tonnes** of fresh head lettuce. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.

## Net Fresh Head Lettuce International Trade



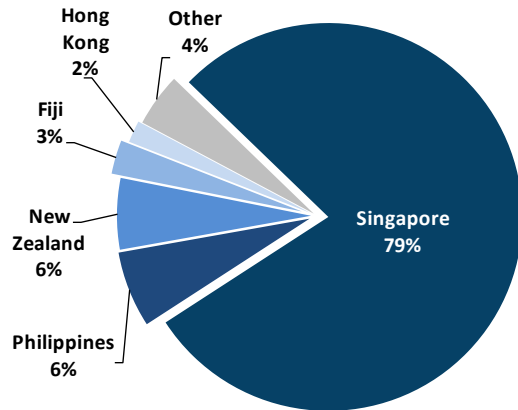
Source: GTA





For the year ending June 2019, **79%** of exported fresh head lettuce was sent to Singapore, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	< 0.5	-	-	Western Australia	30	228	379
<b>Other</b>	<b>&lt; 0.5</b>	-	-	New South Wales	67	90	77
<b>TOTAL</b>	<b>&lt;1</b>	-	-	Victoria	22	46	76
				Queensland	48	68	32
				South Australia	1	< 0.5	1
				<b>Other</b>	<b>26</b>	<b>&lt; 0.5</b>	<b>1</b>
				<b>TOTAL</b>	<b>194</b>	<b>432</b>	<b>565</b>

## Fresh Head Lettuce Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	< 0.5	-	-	Singapore	118	323	444
<b>Other</b>	<b>&lt; 0.5</b>	-	-	Philippines	5	3	36
<b>TOTAL</b>	<b>&lt;1</b>	-	-	New Zealand	-	13	34
				Fiji	< 0.5	14	16
				Hong Kong	19	13	10
				<b>Other</b>	<b>52</b>	<b>67</b>	<b>25</b>
				<b>TOTAL</b>	<b>194</b>	<b>432</b>	<b>565</b>

Source: GTA





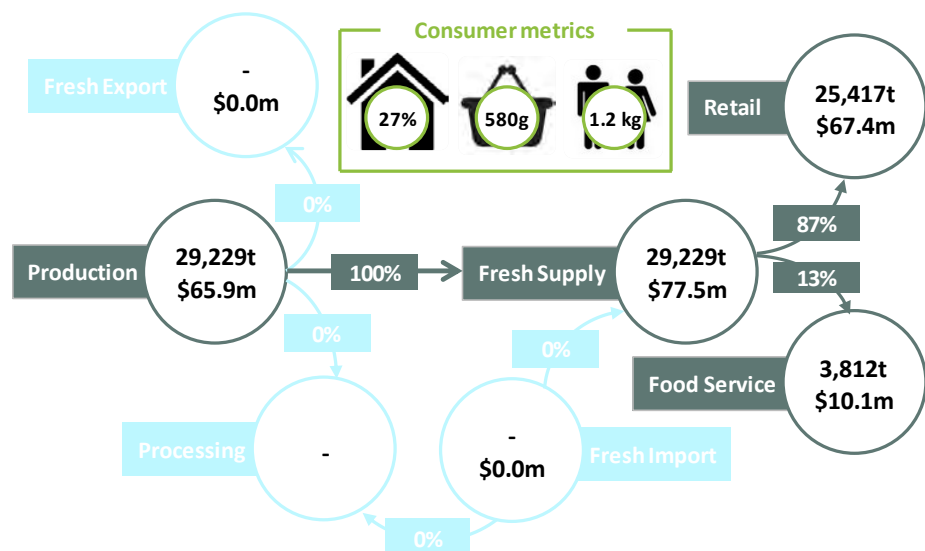
## Fresh Leafy Asian Vegetables Overview

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 2019:

- **29,229 t** produced and valued at **\$65.9 m**.
- The wholesale value of the fresh supply was **\$77.5 m**, with **\$67.4 m** distributed into retail and **\$10.1 m** into food service.
- **27%** of Australian households purchased leafy Asian vegetables, buying an average of **580 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 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	29,067	28,541	-2%	29,229	+2%
Production (\$m)	\$ 67.7	\$ 64.5	-5%	\$ 65.9	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	29,067	28,541	-2%	29,229	+2%
Fresh Supply Wholesale Value (\$m)	\$ 79.7	\$ 75.9	-5%	\$ 77.5	+2%
Supply per Capita (kg)	1.19	1.14	-3%	1.16	+1%

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

## Major Leafy Asian Vegetable Production Areas

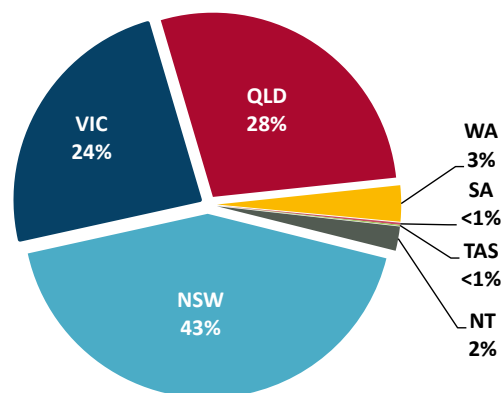
Most leafy Asian vegetables are grown close to the major population centres in market gardens, across most states of Australia. Major production regions include **Gympie** in Queensland; the **Sydney Basin** in New South Wales; and the **Melbourne region** in Victoria.



Source: AUSVEG



## 2018/19 Leafy Asian Vegetables Production by State



Source: AUSVEG

## Fresh Leafy Asian Vegetables Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	12,468												
Victoria	6,982												
Queensland	8,152												
Western Australia	926												
South Australia	54												
Tasmania	25												
Northern Territory	621												
Availability legend			High		Medium		Low						

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:

**Pak Choy** accounted for **28%** of fresh production for the year ending June 2019.

**Bok Choy** accounted for **15%** of fresh production for the year ending June 2019.

**Choy Sum** accounted for **5%** of fresh production for the year ending June 2019.



**Baby Choy** varieties accounted for **7%** of fresh production for the year ending June 2019.

**Gai Lan**, also known as Chinese broccoli, accounted for **4%** of fresh production for the year ending June 2019.

**Wombok**, also known as Chinese cabbage, accounted for **38%** of fresh production volume for the year ending June 2019.

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	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pak Choy	8,184												
Bok Choy	4,384												
Gai Lan	1,198												
Choy Sum	1,461												
Baby Choy	2,046												
Wombok	11,107												
<b>Other</b>	<b>848</b>												
Availability legend			High		Medium		Low						

Source: AUSVEG





## Fresh Leafy Salad Overview

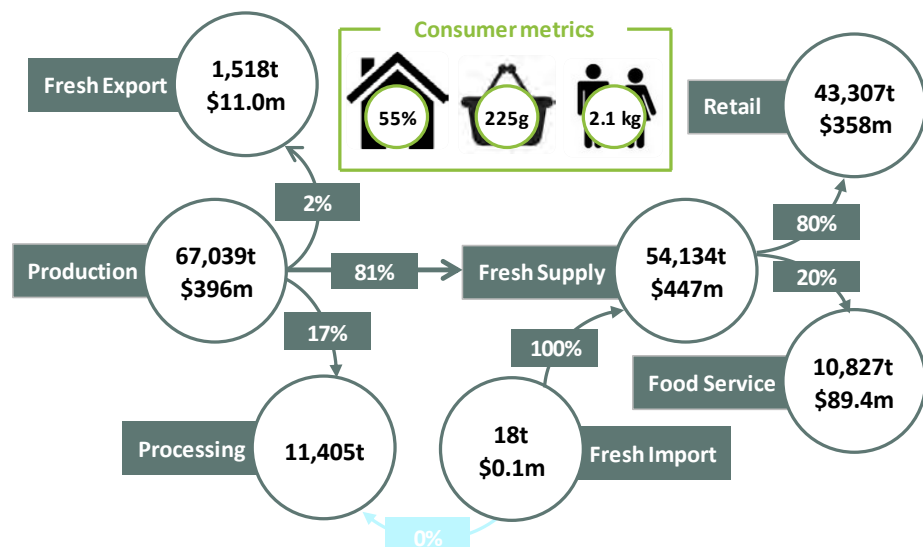
Leafy salad vegetables refers to a number of varieties of leafy vegetables that are typically sold in a loose form, such as rocket and baby spinach. Approximately **17%** of the production of each leafy salad vegetable (including the root mass) is cut off before being sold. This has been included in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

For the year ending June 2019:

- **67,039 t** produced and valued at **\$396 m** with **17%** cut off.
- The wholesale value of the fresh supply was **\$447 m**, with **\$358 m** distributed into retail and **\$89.4 m** into food service.
- **55%** of Australian households purchased leafy salad vegetables, buying an average of **225 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 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	52,356	56,204	+7%	67,039	+19%
Production (\$m)	\$ 304.3	\$ 348.2	+14%	\$ 396.3	+14%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	1,313	1,358	+3%	1,518	+12%
Fresh Export Value (\$m)	\$ 8.4	\$ 9.4	+13%	\$ 11.0	+16%
Fresh Import Volume (t)	4	-	-100%	18	-
Fresh Import Value (\$m)	< \$0.1	\$ -	-100%	\$ 0.1	-
Fresh Supply (t)	42,140	45,284	+7%	54,134	+20%
Fresh Supply Wholesale Value (\$m)	\$ 343.2	\$ 392.8	+14%	\$ 447.1	+14%
Supply per Capita (kg)	1.72	1.82	+6%	2.15	+18%

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

## Major Leafy Salad Vegetable Production Areas

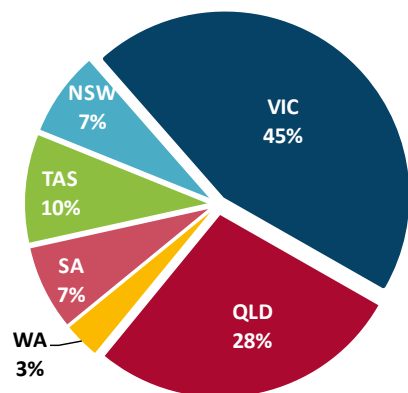
Most leafy salad vegetables are grown close to the major population centres, across most states of Australia. Major production regions include **Gatton** in Queensland; and **Bacchus Marsh** and the **Gippsland region** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Leafy Salad Vegetables Production by State



Source: AUSVEG

## Fresh Leafy Salad Vegetables Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	4,993												
Victoria	29,960												
Queensland	18,547												
Western Australia	2,126												
South Australia	4,993												
Tasmania	6,420												
Availability legend		High		Medium		Low				None			

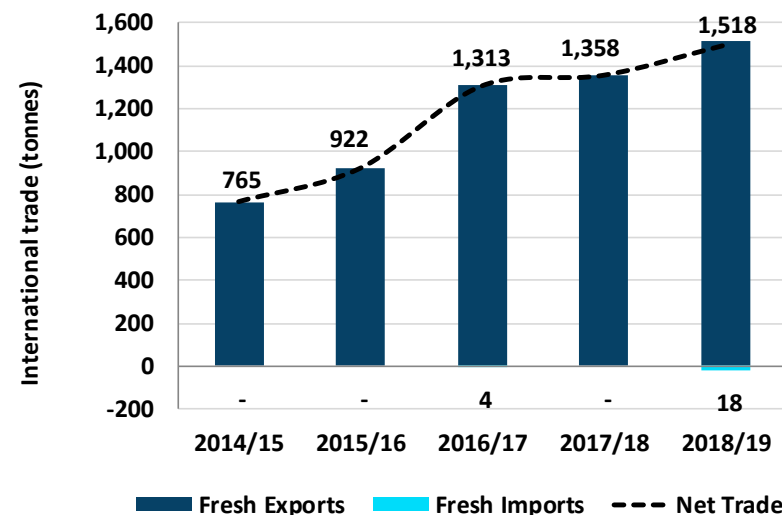
Source: AUSVEG

## Fresh Leafy Salad Vegetables International Trade

Australia is a net exporter of leafy salad vegetables. For the year ending June 2019, Australia exported **1,518 tonnes** of fresh leafy salad vegetables. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



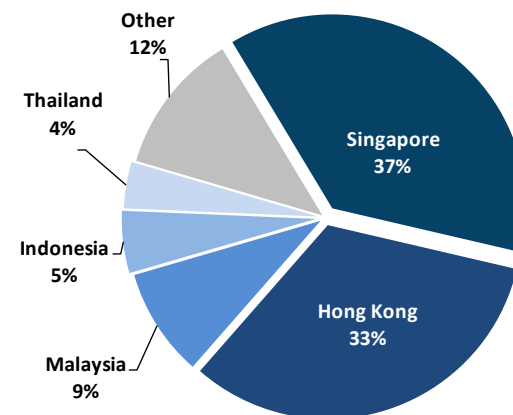
## Net Fresh Leafy Salad Vegetables International Trade



Source: GTA

For the year ending June 2019, **37%** of exported fresh leafy salad vegetables were sent to Singapore, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	4	-	18	Victoria	797	857	952
<b>TOTAL</b>	<b>4</b>	<b>-</b>	<b>18</b>	Queensland	290	207	252
				New South Wales	137	123	206
				Western Australia	87	170	106
				South Australia	<0.5	1	2
				<b>Other</b>	<b>2</b>	<b>-</b>	<b>0</b>
				<b>TOTAL</b>	<b>1,313</b>	<b>1,358</b>	<b>1,518</b>

## Fresh Leafy Salad Vegetables Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
New Zealand	4	-	18	Singapore	471	614	566
<b>TOTAL</b>	<b>4</b>	<b>-</b>	<b>18</b>	Hong Kong	279	380	498
				Malaysia	95	73	137
				Indonesia	90	66	79
				Thailand	62	56	59
				<b>Other</b>	<b>316</b>	<b>171</b>	<b>180</b>
				<b>TOTAL</b>	<b>1,313</b>	<b>1,358</b>	<b>1,518</b>

Source: GTA





## Fresh Leeks Overview

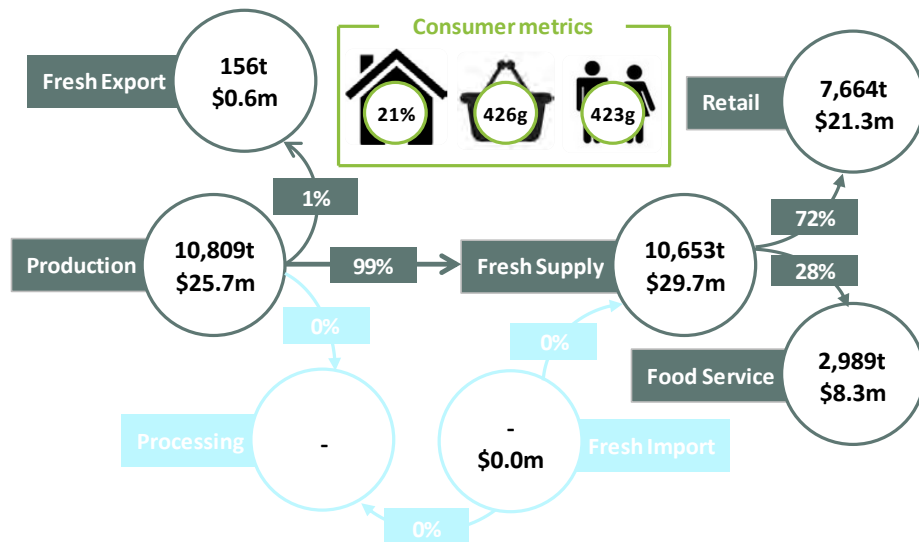
Leeks are grown predominantly in Victoria. Almost all of the leeks grown in Australia are destined for the fresh market.

For the year ending June 2019:

- **10,809 t** produced and valued at **\$25.7 m**.
- The wholesale value of the fresh supply was **\$29.7 m**, with **\$21.3 m** distributed into retail and **\$8.3 m** into food service.
- **21%** of Australian households purchased leeks, buying an average of **426 g** of leeks per shopping trip.
- The supply per capita was **423 g**, based on the volume supplied.



## Fresh Leeks Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,051	8,736	-3%	10,809	+24%
Production (\$m)	\$ 20.4	\$ 21.0	+3%	\$ 25.7	+23%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	176	124	-30%	156	+26%
Fresh Export Value (\$m)	\$ 0.8	\$ 0.6	-24%	\$ 0.6	+8%
Fresh Import Volume (t)	24	29	+21%	-	-100%
Fresh Import Value (\$m)	< \$0.1	\$ 0.1	+37%	\$ -	-100%
Fresh Supply (t)	8,899	8,641	-3%	10,653	+23%
Fresh Supply Wholesale Value (\$m)	\$ 23.3	\$ 24.2	+4%	\$ 29.7	+23%
Supply per Capita (kg)	0.36	0.35	-5%	0.42	+22%

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

## Major Leek Production Areas

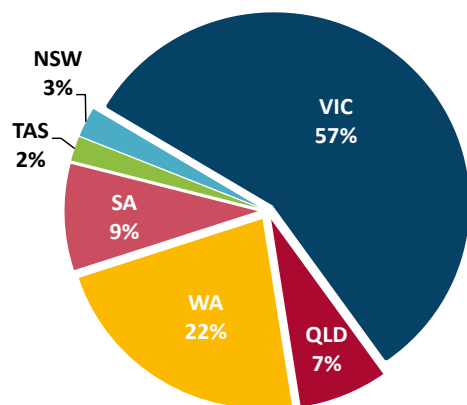
Leeks are grown in most states of Australia, with the majority of production occurring in Victoria. The major production area is the **Devon Meadows region** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Leeks Production by State



Source: AUSVEG

## Fresh Leeks Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	272												
Victoria	6,110												
Queensland	800												
Western Australia	2,421												
South Australia	980												
Tasmania	226												
Availability legend		High		Medium		Low		None					

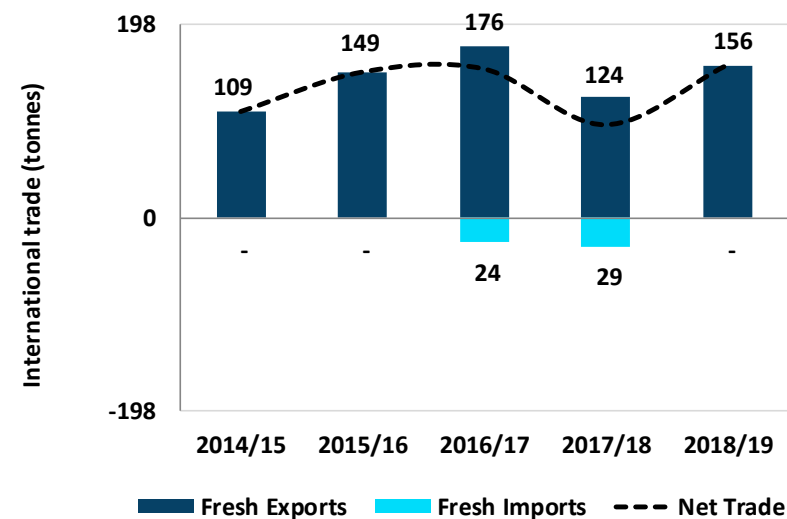
Source: AUSVEG

## Fresh Leeks International Trade

Australia has a small trade in leeks. For the year ending June 2019, Australia exported **156 tonnes** of fresh leeks. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes.



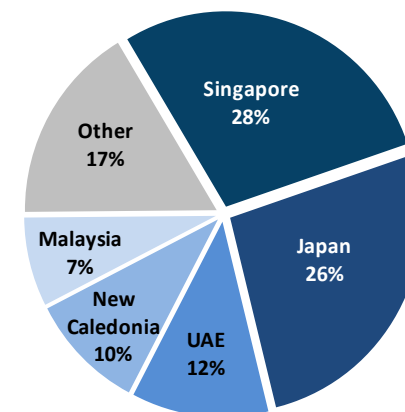
## Net Fresh Leeks International Trade



Source: GTA

For the year ending June 2019, **28%** of exported fresh leeks were sent to Singapore, as profiled in the chart below.

## 2018/19 Fresh Leeks Exports by Country



Source: GTA



## Fresh Leeks Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	24	18	-	Victoria	140	90	98
New South Wales	-	10	-	Queensland	19	18	42
Western Australia	-	1	-	New South Wales	10	13	10
<b>TOTAL</b>	<b>24</b>	<b>29</b>	-	Western Australia	4	3	5
				South Australia	2	1	1
				<b>Other</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>176</b>	<b>124</b>	<b>156</b>

## Fresh Leeks Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	24	24	-	Singapore	27	12	44
Turkey	-	5	-	Japan	56	34	41
<b>TOTAL</b>	<b>24</b>	<b>29</b>	-	UAE	19	18	18
				New Caledonia	19	22	15
				Malaysia	14	8	12
				<b>Other</b>	<b>41</b>	<b>30</b>	<b>26</b>
				<b>TOTAL</b>	<b>176</b>	<b>124</b>	<b>156</b>

Source: GTA





## Fresh Mushrooms Overview

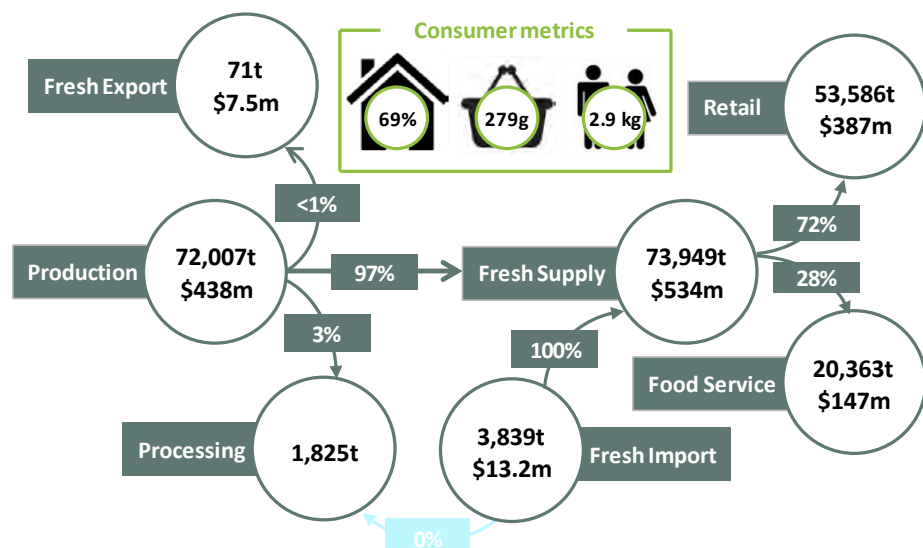
Mushrooms refer to a number of edible mushrooms grown for human consumption, including *agaricus bisporus* (button, cup, flat and brown mushrooms), as well as a number of exotic varieties including shiimeji and oyster mushrooms. Mushrooms are grown in most states of Australia, close to population centres.



For the year ending June 2019:

- **72,007 t** produced and valued at **\$438 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$534 m**, with **\$387 m** distributed into retail and **\$147 m** into food service.
- **69%** of Australian households purchased mushrooms, buying an average of **279 g** of mushrooms per shopping trip.
- The supply per capita was **2.9 kg**, based on the volume supplied.

## Fresh Mushrooms Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	67,089	70,463	+5%	72,007	+2%
Production (\$m)	\$ 396.6	\$ 456.6	+15%	\$ 437.7	-4%
Production area (Ha)	139	173	+24%	-	-
Fresh Export Volume (t)	62	89	+43%	71	-20%
Fresh Export Value (\$m)	\$ 4.9	\$ 6.8	+41%	\$ 7.5	+9%
Fresh Import Volume (t)	3,151	3,288	+4%	3,839	+17%
Fresh Import Value (\$m)	\$ 10.7	\$ 11.1	+4%	\$ 13.2	+19%
Fresh Supply (t)	68,414	71,877	+5%	73,949	+3%
Fresh Supply Wholesale Value (\$m)	\$ 482.8	\$ 554.5	+15%	\$ 534.1	-4%
Supply per Capita (kg)	2.79	2.88	+3%	2.93	+2%

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

## Major Mushroom Production Areas

Mushrooms are grown in most states of Australia, close to population centres. The major production areas are near **Adelaide** in South Australia; **Melbourne Metro** in Victoria and the **Sydney Basin** in New South Wales.



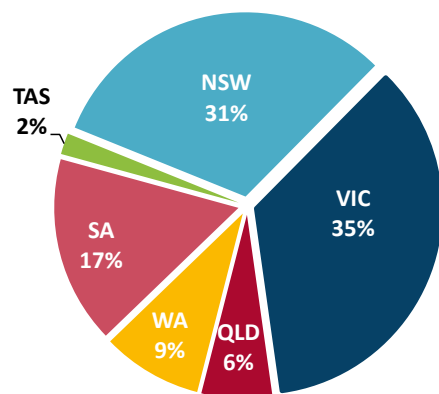
Source: AMGA





## Mushrooms

### 2018/19 Fresh Mushrooms Production by State



Source: AMGA

### Fresh Mushrooms Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	22,538												
Victoria	25,462												
Queensland	4,474												
Western Australia	6,344												
South Australia	11,853												
Tasmania	1,336												
Availability legend		High		Medium		Low						None	

Source: AMGA

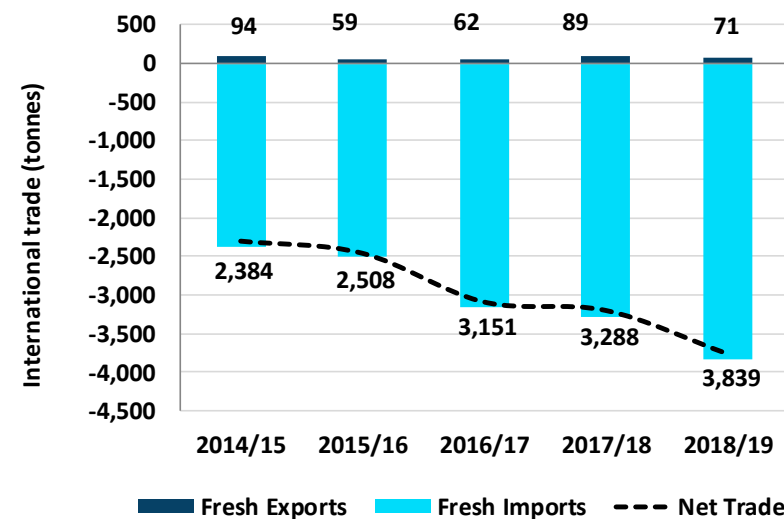
### Fresh Mushrooms International Trade

Australia is a net importer of fresh mushrooms. For the year ending June 2019, Australia imported **3,839 tonnes** of fresh mushrooms. The exports and imports over the last 5 financial years is profiled in the graph to the right, where imports are counted as negative tonnes. *Note: fresh mushrooms international trade includes truffles.*

## Mushrooms



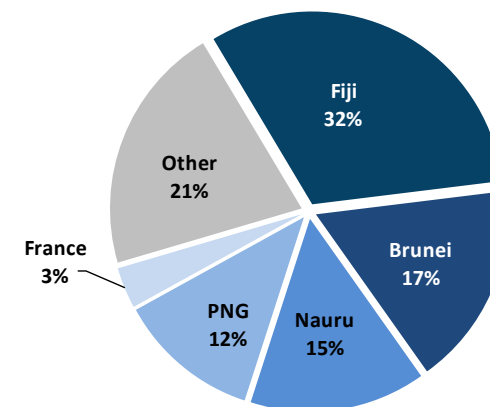
### Net Fresh Mushrooms International Trade



Source: GTA

For the year ending June 2019, **32%** of exported fresh mushrooms were sent to Fiji, as profiled in the chart below.

### 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	1,607	1,528	1,713	Queensland	43	57	42
Victoria	1,260	1,340	1,609	Victoria	9	17	17
Western Australia	215	262	334	Western Australia	6	8	9
Queensland	68	158	171	New South Wales	4	6	3
South Australia	2	< 0.5	12	South Australia	< 0.5	1	< 0.5
<b>Other</b>	-	< 0.5	< 0.5	<b>Other</b>	< 0.5	< 0.5	< 0.5
<b>TOTAL</b>	<b>3,151</b>	<b>3,288</b>	<b>3,839</b>	<b>TOTAL</b>	<b>62</b>	<b>89</b>	<b>71</b>

## Fresh Mushrooms Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Sth. Korea	2,561	2,709	3,160	Fiji	12	22	23
China	486	526	574	Brunei	16	14	12
Spain	33	32	50	Nauru	4	9	11
Italy	20	2	18	PNG	15	19	9
Taiwan	18	16	17	France	1	2	2
<b>Other</b>	<b>33</b>	<b>3</b>	<b>20</b>	<b>Other</b>	<b>14</b>	<b>22</b>	<b>15</b>
<b>TOTAL</b>	<b>3,151</b>	<b>3,288</b>	<b>3,839</b>	<b>TOTAL</b>	<b>62</b>	<b>89</b>	<b>71</b>

Source: GTA

## Processed Mushrooms International Trade

For the year ending June 2019, an additional **4,398 tonnes** of preserved mushrooms and **709 tonnes** of dried mushrooms were imported, while **108 tonnes** of preserved mushrooms and **25 tonnes** of dried mushrooms were exported.



Source: GTA





## Fresh Onions Overview

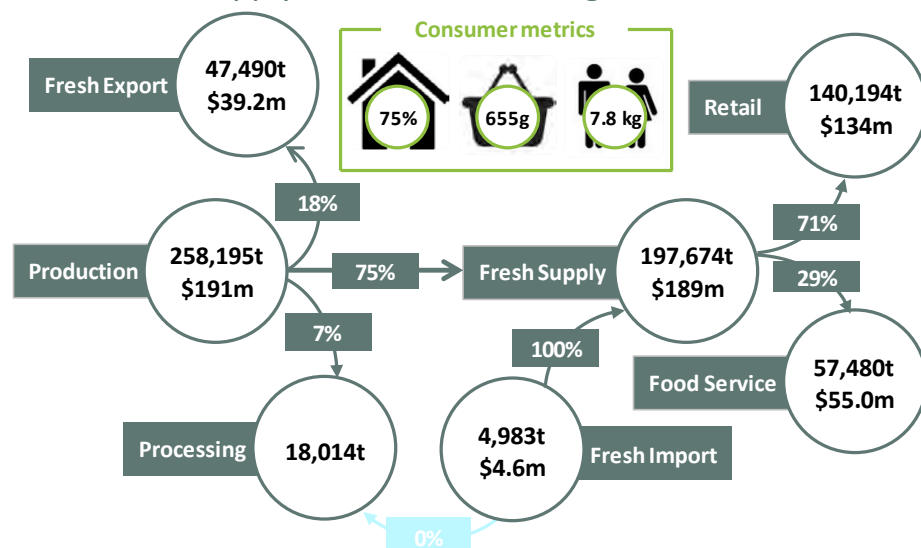
Onions are grown across most states of Australia. Processed onions are typically dried and preserved.

For the year ending June 2019:

- **258,195 t** produced and valued at **\$191 m** with **7%** sent to processing.
- The wholesale value of the fresh supply was **\$189 m**, with **\$134 m** distributed into retail and **\$55 m** into food service.
- **75%** of Australian households purchased onions, buying an average of **655 g** of onions per shopping trip.
- The supply per capita was **7.8 kg**, based on the volume supplied.



## Fresh Onions Supply Chain—Year Ending June 2019



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

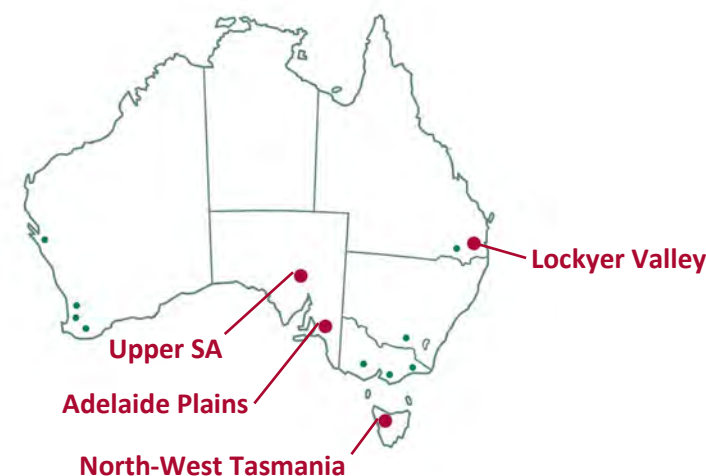


Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	237,635	249,145	+5%	258,195	+4%
Production (\$m)	\$ 174.2	\$ 164.8	-5%	\$ 191.2	+16%
Production area (Ha)	4,565	5,152	+13%	-	-
Fresh Export Volume (t)	24,798	30,514	+23%	47,490	+56%
Fresh Export Value (\$m)	\$ 18.1	\$ 21.7	+20%	\$ 39.2	+81%
Fresh Import Volume (t)	8,337	5,482	-34%	4,983	-9%
Fresh Import Value (\$m)	\$ 5.8	\$ 4.6	-21%	\$ 4.6	<1%
Fresh Supply (t)	203,335	206,731	+2%	197,674	-4%
Fresh Supply Wholesale Value (\$m)	\$ 193.2	\$ 175.5	-9%	\$ 189.0	+8%
Supply per Capita (kg)	8.30	8.29	>-1%	7.84	-5%

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

## Major Onion Production Areas

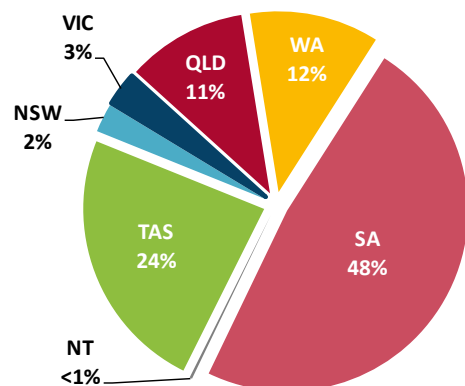
Onions are grown in most states of Australia, with the majority of production occurring in South Australia and Tasmania. The major production areas include the **Lockyer Valley** in Queensland; **Upper South Australia** and the **Adelaide Plains** in South Australia; and in the **North-West region** of Tasmania.



Source: OA



## 2018/19 Fresh Onions Production by State



Source: ABS

## Fresh Onions Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	6,604												
Victoria	7,877												
Queensland	27,723												
Western Australia	29,890												
South Australia	124,206												
Tasmania	61,289												
Northern Territory	605												
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 2019.

**Red onions** accounted for **19%** of fresh production for the year ending June 2019.

**White onions** accounted for **1%** of fresh production for the year ending June 2019.

**Shallots/Spring onions** accounted for **<1%** of fresh production for the year ending June 2019.

## Seasonality by Onion Variety

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

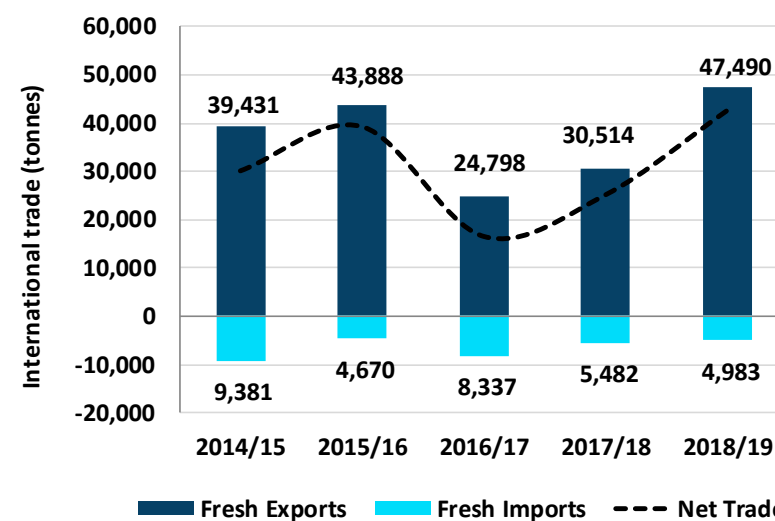
Variety	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Brown	190,635												
Red	46,090												
White	2,299												
Shallots/Spring	1,158												
<b>Processing</b>	<b>18,014</b>												
Availability legend		High		Medium		Low		None					

Source: OA

## Fresh Onion International Trade

Australia is a net exporter of fresh onions. For the year ending June 2019, Australia exported **47,490 tonnes** of fresh onions. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Onions International Trade



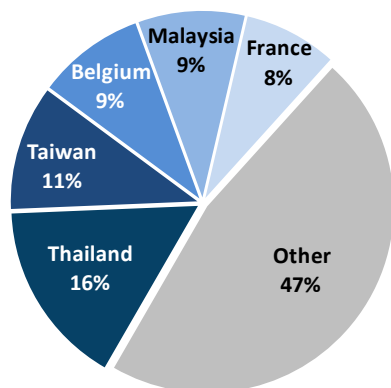
Source: GTA



## Onions

For the year ending June 2019, **16%** of exported fresh onions were sent to Thailand, as profiled in the chart below.

### 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Victoria	3,168	2,383	1,960	Tasmania	13,709	13,531	24,081
New South Wales	2,288	2,119	1,616	South Australia	4,648	8,178	10,846
Western Australia	2,302	885	1,248	Western Australia	5,242	7,553	10,169
Queensland	474	70	159	Queensland	658	620	1,094
Tasmania	-	25	-	Victoria	412	464	1,065
<b>Other</b>	<b>105</b>	<b>-</b>	<b>-</b>	<b>Other</b>	<b>129</b>	<b>168</b>	<b>235</b>
<b>TOTAL</b>	<b>8,337</b>	<b>5,482</b>	<b>4,983</b>	<b>TOTAL</b>	<b>24,798</b>	<b>30,514</b>	<b>47,490</b>

### Fresh Onions Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	5,687	3,943	3,917	Thailand	1,124	3,173	7,545
Netherlands	603	788	571	Taiwan	2,247	5,053	5,086
US	1,944	530	488	Belgium	745	1,246	4,377
Pakistan	4	6	4	Malaysia	1,462	1,960	4,340
Italy	-	-	2	France	2,044	2,185	3,790
<b>Other</b>	<b>99</b>	<b>215</b>	<b>1</b>	<b>Other</b>	<b>17,176</b>	<b>16,897</b>	<b>22,352</b>
<b>TOTAL</b>	<b>8,337</b>	<b>5,482</b>	<b>4,983</b>	<b>TOTAL</b>	<b>24,798</b>	<b>30,514</b>	<b>47,490</b>

Source: GTA



## Onions

### Processed Onions International Trade

For the year ending June 2019, an additional **3,631 tonnes** of dried onions and **965 tonnes** of preserved onions were imported, while **275 tonnes** of dried onions were exported.



Source: GTA







## Fresh Parsnips Overview

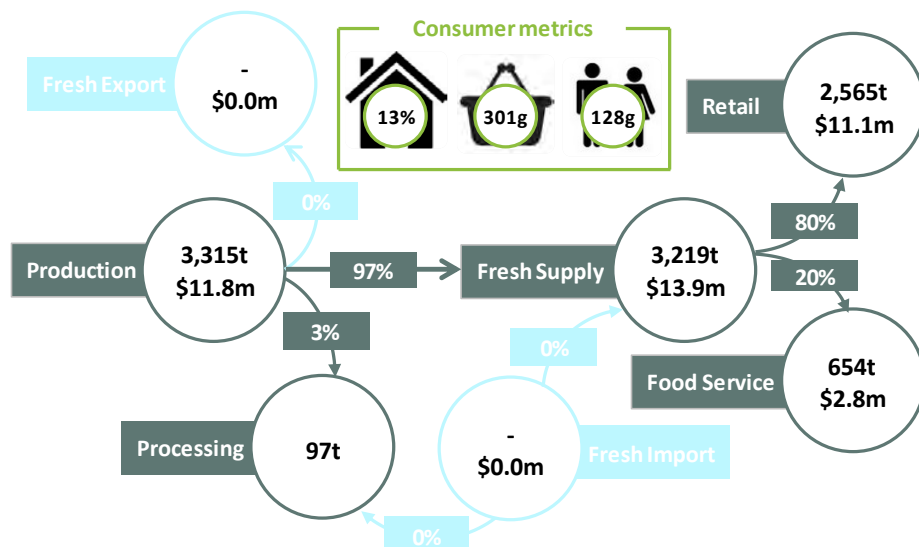
Parsnips are grown across most states of Australia. Almost all of the parsnips grown in Australia are destined for the fresh market.

For the year ending June 2019:

- **3,315 t** produced and valued at **\$11.8 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$13.9 m**, with **\$11.1 m** distributed into retail and **\$2.8 m** into food service.
- **13%** of Australian households purchased parsnips, buying an average of **301 g** of parsnips per shopping trip.
- The supply per capita was **128g**, based on the volume supplied.



## Fresh Parsnips Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,301	3,273	>-1%	3,315	+1%
Production (\$m)	\$ 10.7	\$ 10.9	+1%	\$ 11.8	+9%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	3,205	3,178	>-1%	3,219	+1%
Fresh Supply Wholesale Value (\$m)	\$ 12.6	\$ 12.8	+1%	\$ 13.9	+9%
Supply per Capita (kg)	0.13	0.13	-3%	0.13	<1%

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

\*Note: Figures have been modified from those published in the previous edition of the handbook (2017/18 edition).

## Major Parsnip Production Areas

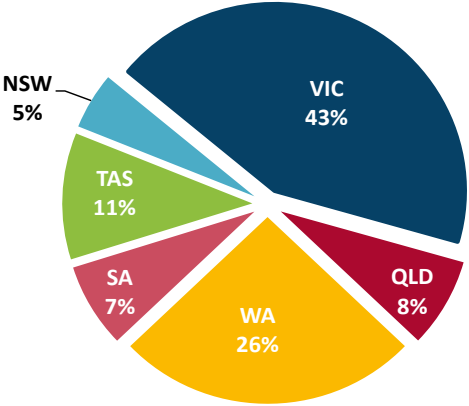
Parsnips are grown across most states of Australia, with the majority of production occurring in Victoria. The major production areas include the **Perth region** in Western Australia; **North West region** in Tasmania; and the **Melbourne region** in Victoria.



Source: AUSVEG



2018/19 Fresh Parsnips Production by State



Source: AUSVEG

Fresh Parsnips Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	163												
Victoria	1,438												
Queensland	257												
Western Australia	852												
South Australia	242												
Tasmania	363												
Availability legend			High		Medium			Low				None	

Source: AUSVEG





## Fresh Peas Overview

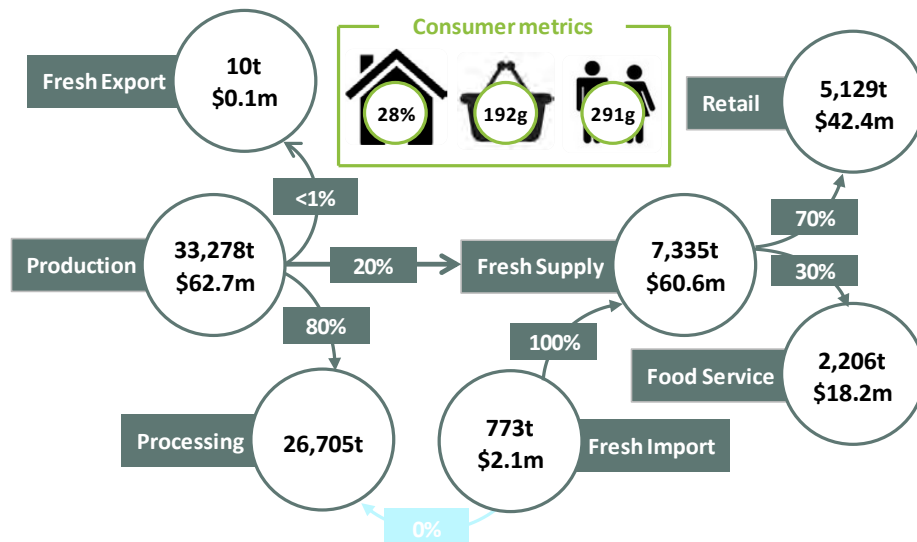
Peas are grown across most states of Australia, with the majority of production occurring in Victoria and Queensland.

For the year ending June 2019:

- **33,278 t** produced and valued at **\$62.7 m** with **80%** sent to processing.
- The wholesale value of the fresh supply was **\$60.6 m**, with **\$42.4 m** distributed into retail and **\$18.2 m** into food service.
- **28%** of Australian households purchased fresh peas, buying an average of **192 g** of peas per shopping trip.
- The supply per capita was **291 g**, based on the volume supplied.



## Fresh Peas Supply Chain—Year Ending June 2019



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

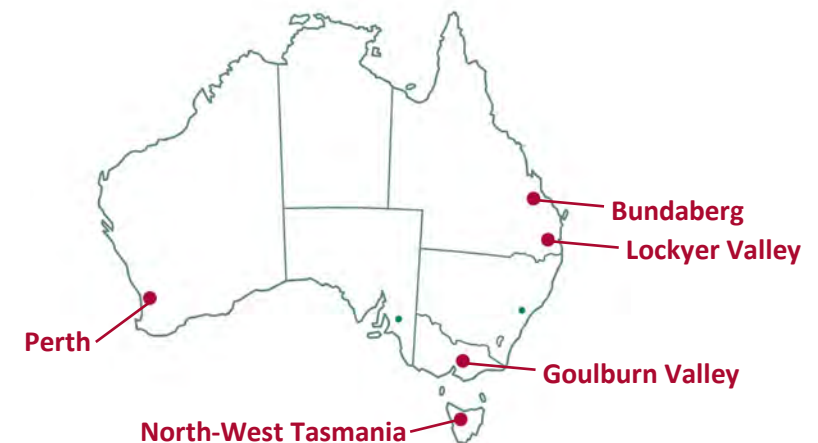


Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	32,733	32,947	<1%	33,278	+1%
Production (\$m)	\$ 59.7	\$ 54.5	-9%	\$ 62.7	+15%
Production area (Ha)	3,816	4,111	+8%	-	-
Fresh Export Volume (t)	18	7	-63%	10	+56%
Fresh Export Value (\$m)	\$ 0.1	< \$0.1	-55%	\$ 0.1	+74%
Fresh Import Volume (t)	782	925	+18%	773	-16%
Fresh Import Value (\$m)	\$ 2.4	\$ 2.6	+8%	\$ 2.1	-18%
Fresh Supply (t)	7,229	7,426	+3%	7,335	-1%
Fresh Supply Wholesale Value (\$m)	\$ 57.9	\$ 53.8	-7%	\$ 60.6	+13%
Supply per Capita (kg)	0.29	0.30	<1%	0.29	-2%

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

## Major Pea Production Areas

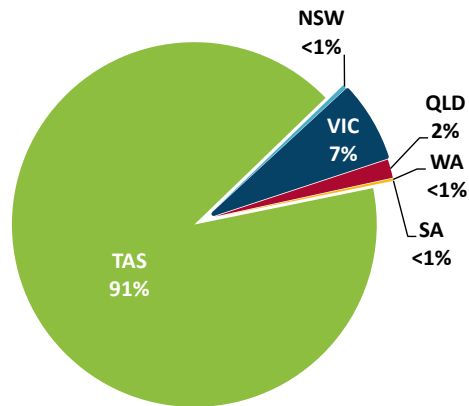
Peas are grown in most states of Australia, with the majority of production occurring in Victoria and Queensland. The major production areas include **Bundaberg** and the **Lockyer Valley** in Queensland; the **Goulburn Valley** in Victoria; the **Perth region** in Western Australia and **North-West Tasmania**.



Source: AUSVEG



## 2018/19 Fresh Peas Production by State



Source: AUSVEG

## Fresh Pea Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	118												
Victoria	2,264												
Queensland	547												
Western Australia	69												
South Australia	3												
Tasmania	30,277												
Availability legend			High		Medium		Low						

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:

**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.



**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.

## Seasonality by Pea Variety

Variety	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Snow Peas	5,451												
Sugar Snap	1,038												
Garden/Processed	26,789												
Availability legend			High		Medium		Low						

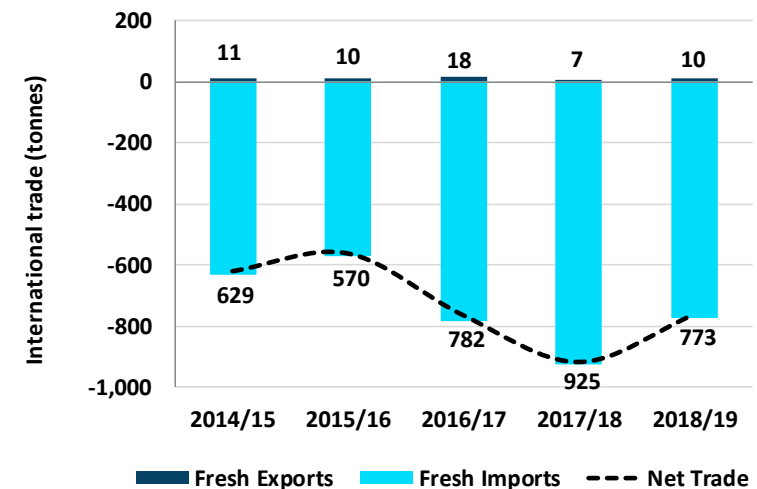
The seasonal availability of some major varieties is profiled in the table below.

Source: AUSVEG

## Fresh Peas International Trade

Australia is a net importer of fresh peas, with only minimal exports. For the year ending June 2019, Australia imported **773 tonnes** of fresh peas. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

## Net Fresh Peas International Trade

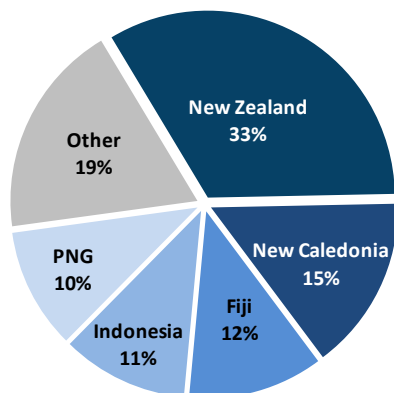


Source: GTA



For the year ending June 2019, **33%** of exported fresh peas were sent to New Zealand, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Western Australia	290	433	508	Queensland	7	3	6
New South Wales	342	351	185	Victoria	5	4	4
Victoria	133	141	78	New South Wales	< 0.5	< 0.5	< 0.5
Queensland	17	-	1	Western Australia	-	-	< 0.5
<b>TOTAL</b>	<b>782</b>	<b>925</b>	<b>773</b>	South Australia	< 0.5	< 0.5	< 0.5
				<b>Other</b>	<b>7</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>18</b>	<b>7</b>	<b>10</b>

## Fresh Peas Imports and Exports by Country

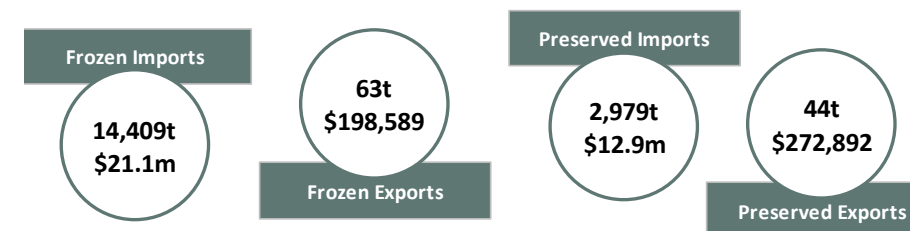
Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Belgium	210	278	380	New Zealand	6	-	3
China	452	483	290	New Caledonia	2	2	2
India	18	32	55	Fiji	1	1	1
Italy	30	62	18	Indonesia	< 0.5	< 0.5	1
Turkey	-	-	4	PNG	2	2	1
<b>Other</b>	<b>73</b>	<b>70</b>	<b>25</b>	<b>Other</b>	<b>7</b>	<b>3</b>	<b>2</b>
<b>TOTAL</b>	<b>782</b>	<b>925</b>	<b>773</b>	<b>TOTAL</b>	<b>18</b>	<b>7</b>	<b>10</b>

Source: GTA



## Processed Peas International Trade

For the year ending June 2019, an additional **14,409 tonnes** of frozen peas and **2,979 tonnes** of preserved peas were imported, while **63 tonnes** of frozen peas and **44 tonnes** of preserved peas were exported.



Source: GTA







## Potatoes Overview

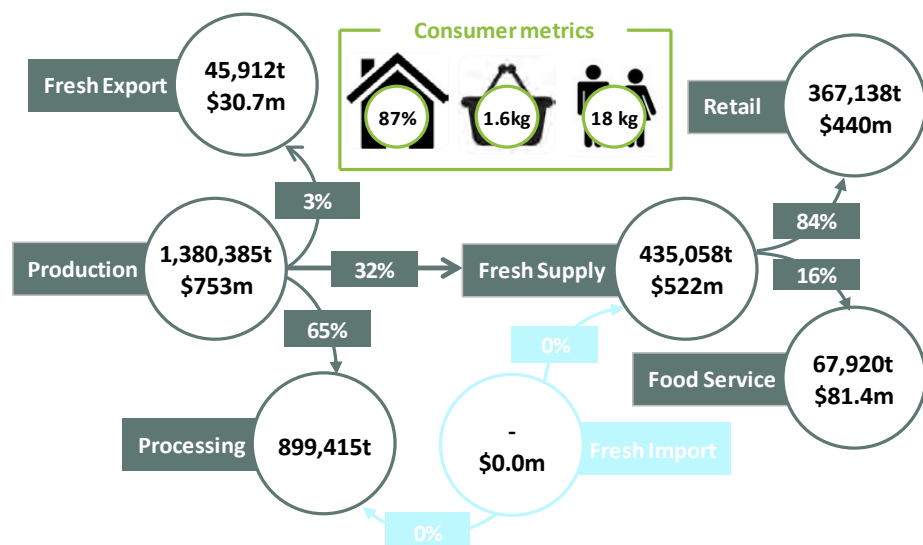
Potatoes are grown across Australia, with the majority of production occurring in South Australia and Tasmania.

For the year ending June 2019:

- **1,380,385 t** produced and valued at **\$753 m** with **65%** or **899,415 t** sent to processing.
- The wholesale value of the fresh supply was **\$522 m**, with **\$440 m** distributed into retail and **\$81.4 m** into food service.
- **87%** of Australian households purchased potatoes, buying an average of **1.6 kg** of potatoes per shopping trip.
- The supply per capita was **18 kg**, based on the volume supplied.



## Potatoes Supply Chain—Year Ending June 2018



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

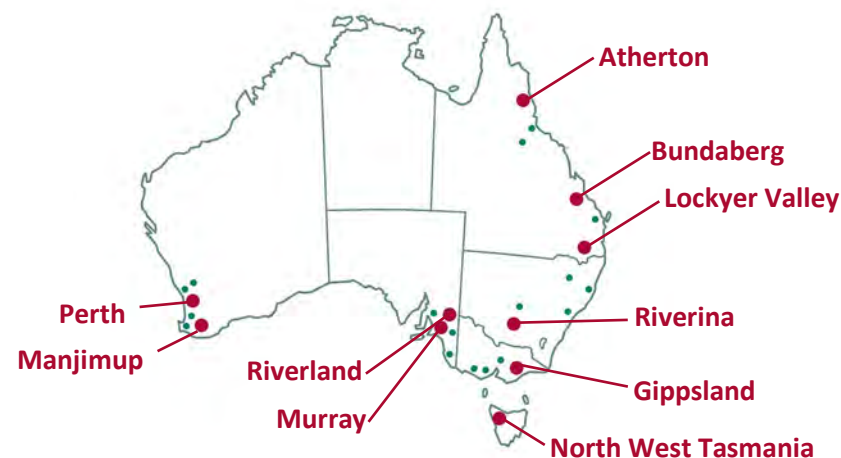


Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,333,418	1,388,968	+4%	1,380,385	>-1%
Production (\$m)	\$ 717.0	\$ 745.9	+4%	\$ 752.6	<1%
Production area (Ha)	28,372	29,740	+5%	-	-
Fresh Export Volume (t)	34,782	36,529	+5%	45,912	+26%
Fresh Export Value (\$m)	\$ 27.8	\$ 28.0	<1%	\$ 30.7	+10%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	428,613	441,439	+3%	435,058	-1%
Fresh Supply Wholesale Value (\$m)	\$ 500.0	\$ 518.8	+4%	\$ 521.7	<1%
Supply per Capita (kg)	17.49	18.01	+3%	17.56	-2%

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

## Major Potato Production Areas

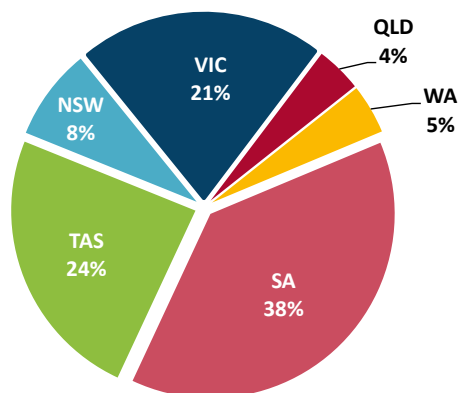
Potatoes are grown across Australia. Major production areas include: the **Riverlands** and the **Murray region** in South Australia; **North West** region in Tasmania; the **Gippsland region** in Victoria; the **Riverina** in New South Wales; the **Lockyer Valley**, **Bundaberg** and **Atherton Tablelands** in Queensland; and **Manjimup** and the **Perth region** in Western Australia.



Source: AUSVEG



## 2018/19 Potatoes Production by State



Source: AUSVEG

## Potatoes Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	111,188												
Victoria	291,868												
Queensland	55,594												
Western Australia	60,029												
South Australia	528,143												
Tasmania	333,564												
Availability legend		High		Medium		Low		None					

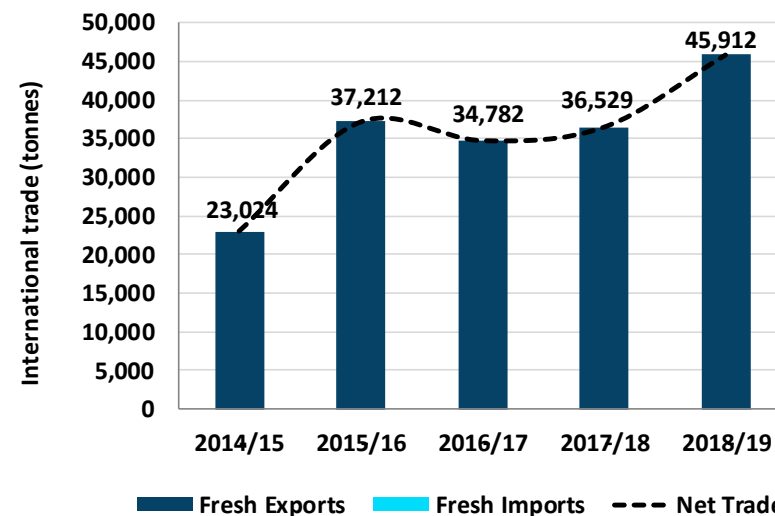
Source: AUSVEG

## Fresh Potatoes International Trade

Australia is a net exporter of fresh potatoes. For the year ending June 2019, Australia exported **45,912 tonnes** of fresh potatoes. The exports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.



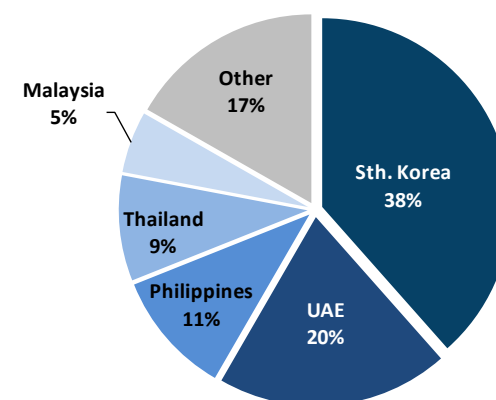
## Net Fresh Potatoes International Trade



Source: GTA

For the year ending June 2019, **38%** of exported fresh potatoes were sent to South Korea, as profiled in the chart below.

## 2018/19 Fresh Potatoes Exports by Country



Source: GTA



## Potatoes

### Fresh Potatoes Imports and Exports by State

Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019
South Australia	12,231	14,984	26,295
New South Wales	19,153	16,435	15,419
Western Australia	2,349	2,615	3,584
Victoria	302	2,150	329
Queensland	686	336	284
<b>Other</b>	<b>61</b>	<b>9</b>	<b>1</b>
<b>TOTAL</b>	<b>34,782</b>	<b>36,529</b>	<b>45,912</b>

### Fresh Potatoes Imports and Exports by Country

Exports by country (Tonnes)			
Year Ending June	2017	2018	2019
Sth. Korea	20,635	19,921	17,663
UAE	1,785	1,690	9,123
Philippines	100	4,600	4,870
Thailand	500	2,000	4,144
Malaysia	1,684	1,612	2,424
<b>Other</b>	<b>10,178</b>	<b>6,706</b>	<b>7,688</b>
<b>TOTAL</b>	<b>34,782</b>	<b>36,529</b>	<b>45,912</b>

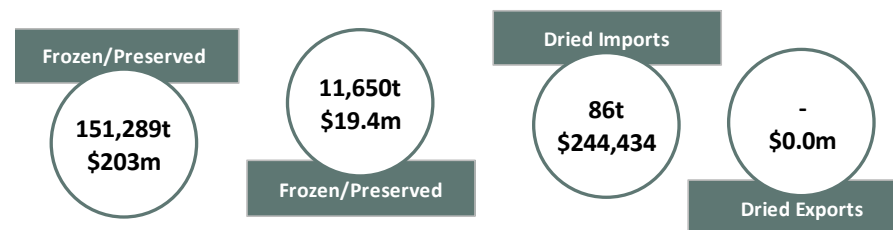
Source: GTA



## Potatoes

### Processed Potatoes International Trade

For the year ending June 2019, an additional **151,289 tonnes** of frozen potatoes and **86 tonnes** of dried potatoes were imported, while **11,650 tonnes** of frozen or preserved potatoes were exported.



Source: GTA





## Pumpkins

### Fresh Pumpkins Overview

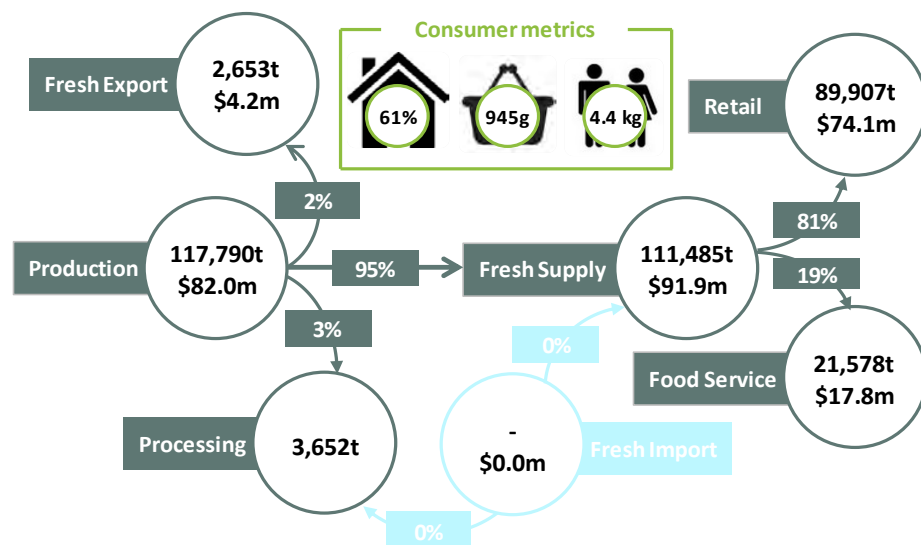
Pumpkins are grown in many states of Australia, with the majority of production occurring in New South Wales and Queensland.

For the year ending June 2019:

- **117,790 t** produced and valued at **\$82 m** with **3%** sent to processing.
- The wholesale value of the fresh supply was **\$91.9 m**, with **\$74.1 m** distributed into retail and **\$17.8 m** into food service.
- **61%** of Australian households purchased pumpkins, buying an average of **945 g** of pumpkins per shopping trip.
- The supply per capita was **4.4 kg**, based on the volume supplied.



### Fresh Pumpkins Supply Chain—Year Ending June 2019



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

## Pumpkins



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	120,981	119,545	-1%	117,790	-1%
Production (\$m)	\$ 76.2	\$ 68.8	-10%	\$ 82.0	+19%
Production area (Ha)	4,832	4,527	-6%	-	-
Fresh Export Volume (t)	2,086	2,074	>-1%	2,653	+28%
Fresh Export Value (\$m)	\$ 3.2	\$ 3.0	-6%	\$ 4.2	+41%
Fresh Import Volume (t)	<1	2	>100%	-	-100%
Fresh Import Value (\$m)	<\$0.1	<\$0.1	+82%	\$ -	-100%
Fresh Supply (t)	115,145	113,767	-1%	111,485	-2%
Fresh Supply Wholesale Value (\$m)	\$ 86.2	\$ 77.7	-10%	\$ 91.9	+18%
Supply per Capita (kg)	4.70	4.56	-3%	4.42	-3%

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

### Major Pumpkin Production Areas

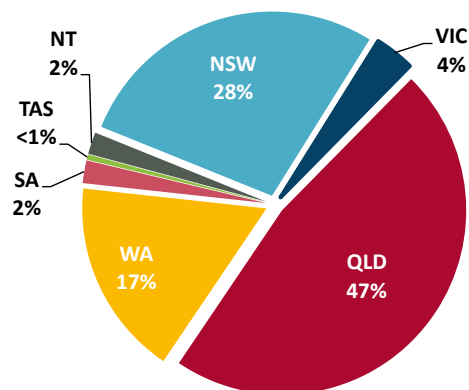
Pumpkins are grown across Australia. Major production areas include the **Murrumbidgee region** in New South Wales; **Bundaberg** and the **Darling Downs region** in Queensland; and the **Northern region** of Victoria.



Source: AUSVEG



## 2018/19 Fresh Pumpkin Production by State



Source: ABS

## Fresh Pumpkins Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	33,222												
Victoria	4,170												
Queensland	56,316												
Western Australia	20,661												
South Australia	2,383												
Tasmania	560												
Northern Territory	2,302												
Availability legend			High		Medium		Low						

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 2019.



**Butternut**, a long pumpkin with a creamy yellow skin. Butternut pumpkins accounted for **31%** of fresh production for the year ending June 2019.

**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 2019.

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	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Jap/Kent	57,980												
Butternut	35,948												
Grey	19,713												
<b>Processing</b>	<b>3,652</b>												
<b>Other</b>	<b>2,319</b>												
Availability legend			High		Medium		Low						

Source: AUSVEG

## Fresh Pumpkins International Trade

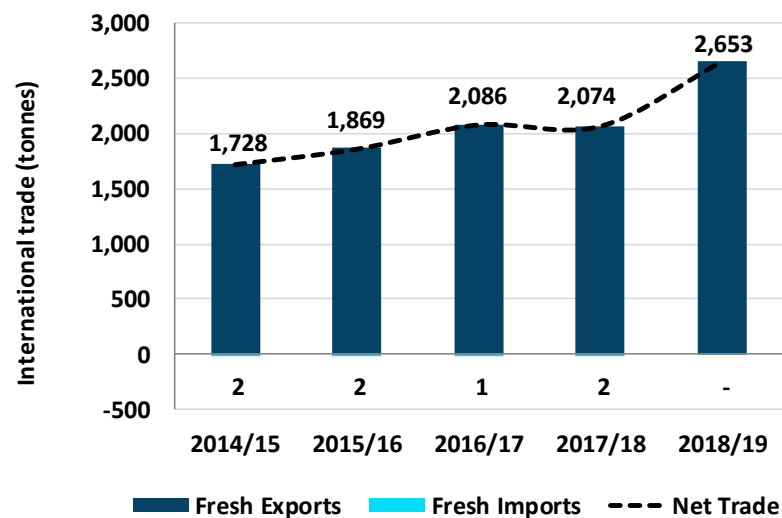
Australia is a net exporter of fresh pumpkin, with only minimal imports. For the year ending June 2019, Australia exported **2,653 tonnes** of fresh pumpkin. The exports and imports over the last 5 financial years is profiled in the graph over the page, where imports are counted as negative tonnes.





## Pumpkins

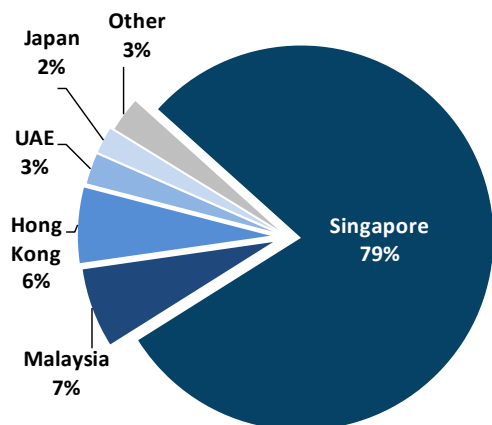
### Net Fresh Pumpkins International Trade



Source: GTA

For the year ending June 2019, **79%** of exported fresh pumpkins were sent to Singapore, as profiled in the chart below.

### 2018/19 Fresh Pumpkins Exports by Country



Source: GTA



## Pumpkins

### Fresh Pumpkins Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	1	2	-	Queensland	985	764	823
<b>TOTAL</b>	<b>1</b>	<b>2</b>	<b>-</b>	Western Australia	57	267	777
				Victoria	531	553	496
				New South Wales	300	373	352
				South Australia	142	116	203
				<b>Other</b>	<b>71</b>	<b>1</b>	<b>1</b>
				<b>TOTAL</b>	<b>2,086</b>	<b>2,074</b>	<b>2,653</b>

### Fresh Pumpkins Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
Bangladesh	1	2	-	Singapore	1,525	1,596	2,106
<b>TOTAL</b>	<b>1</b>	<b>2</b>	<b>-</b>	Malaysia	121	152	177
				Hong Kong	91	110	167
				UAE	137	95	68
				Japan	47	4	58
				<b>Other</b>	<b>165</b>	<b>118</b>	<b>76</b>
				<b>TOTAL</b>	<b>2,086</b>	<b>2,074</b>	<b>2,653</b>

Source: GTA





## Sweet Corn

### 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.

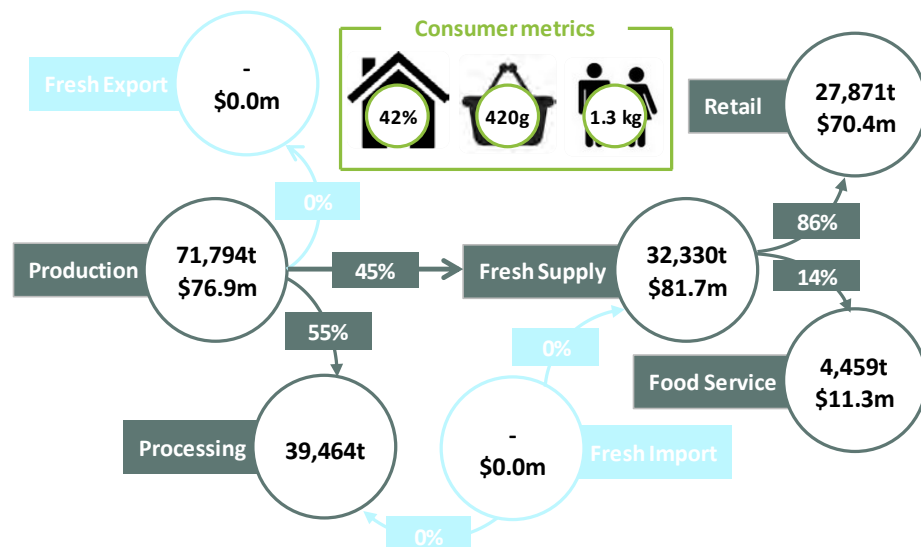
The majority of production occurs in New South Wales and Queensland.

For the year ending June 2019:

- **71,794 t** produced and valued at **\$76.9 m** with **55%** sent to processing.
- The wholesale value of the fresh supply was **\$81.7 m**, with **\$70.4 m** distributed into retail and **\$11.3 m** into food service.
- **42%** of Australian households purchased fresh sweet corn, buying an average of **420 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 2019



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

## Sweet Corn

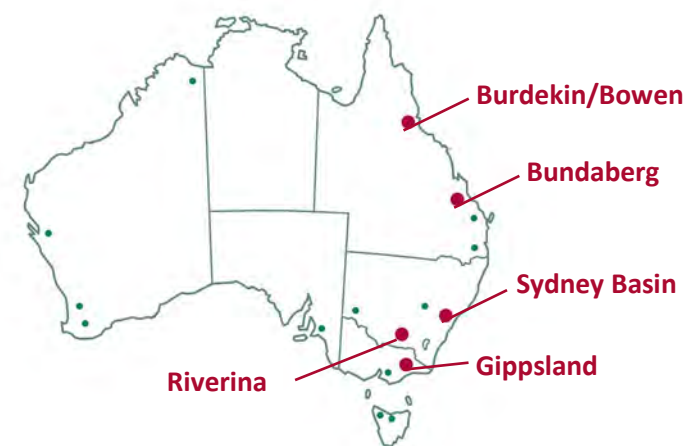


Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	61,333	62,712	+2%	71,794	+14%
Production (\$m)	\$ 66.6	\$ 60.2	-9%	\$ 76.9	+28%
Production area (Ha)	9,044	9,231	+2%	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	27,619	28,241	+2%	32,330	+14%
Fresh Supply Wholesale Value (\$m)	\$ 70.7	\$ 64.0	-9%	\$ 81.7	+28%
Supply per Capita (kg)	1.13	1.13	<1%	1.28	+13%

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

### Major Sweet Corn Production Areas

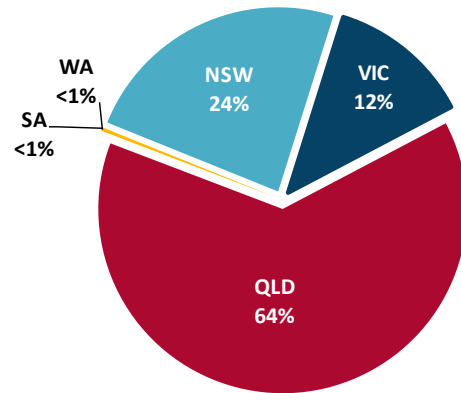
Sweet corn is grown across Australia. Major production areas include the **Riverina** and **Sydney Basin region** in New South Wales; **Bundaberg** and the **Burdekin/Bowen region** in Queensland; and **Gippsland** of Victoria.



Source: AUSVEG



## 2018/19 Fresh Sweet Corn Production by State



Sources: ABS

## Fresh Sweet Corn Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	17,038												
Victoria	8,937												
Queensland	45,598												
Western Australia	220												
South Australia	1												
Availability legend		High		Medium		Low		None					

Sources: AUSVEG





## Fresh Sweetpotatoes

### Overview

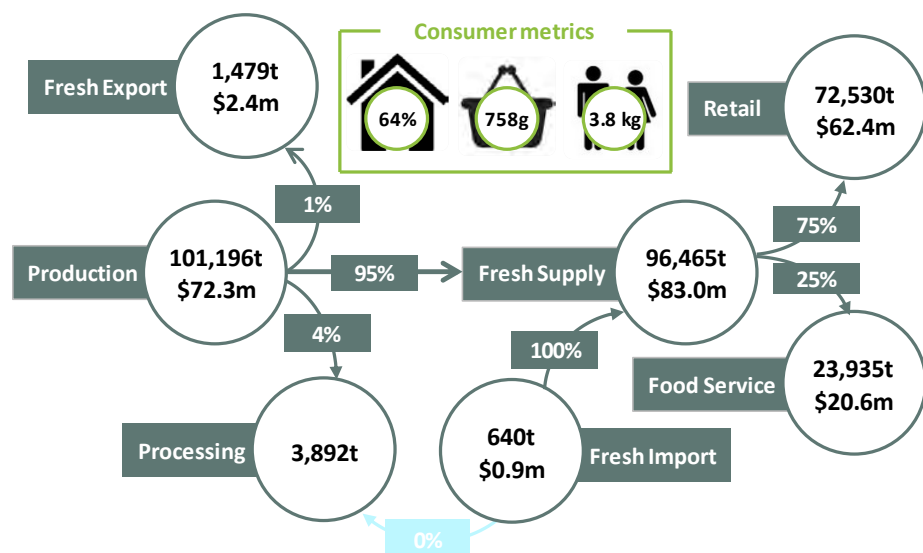
The majority of sweetpotatoes grown in Australia are produced in Queensland, with smaller volumes grown in Western Australia, northern New South Wales and the Northern Territory.

For the year ending June 2019:

- **92,746 t** produced and valued at **\$66.4 m** with **4%** sent to processing.
- The wholesale value of the fresh supply was **\$76 m**, with **\$58.4 m** distributed into retail and **\$17.5 m** into food service.
- **64%** of Australian households purchased sweetpotatoes, buying an average of **758 g** of sweetpotatoes per shopping trip.
- The supply per capita was **3.5 kg**, based on the volume supplied.



### Fresh Sweetpotatoes Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	87,832	97,222	+11%	101,196	+4%
Production (\$m)	\$ 87.7	\$ 73.8	-16%	\$ 72.3	-2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	866	921	+6%	1,479	+61%
Fresh Export Value (\$m)	\$ 1.8	\$ 1.6	-8%	\$ 2.4	+46%
Fresh Import Volume (t)	138	349	>100%	640	+83%
Fresh Import Value (\$m)	\$ 0.4	\$ 0.4	+2%	\$ 0.9	>100%
Fresh Supply (t)	84,547	92,911	+10%	96,465	+4%
Fresh Supply Wholesale Value (\$m)	\$ 101.3	\$ 85.2	-16%	\$ 83.0	-3%
Supply per Capita (kg)	3.45	3.73	+8%	3.83	+3%

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

## Major Sweetpotato Production Areas

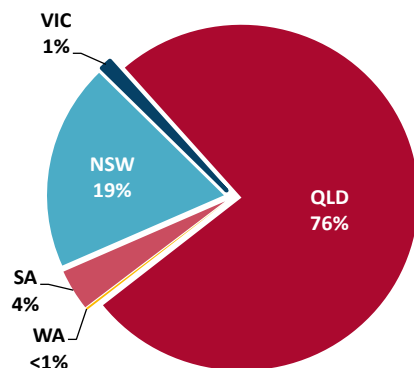
Sweetpotatoes are grown predominantly in Queensland. Major production areas include the **Atherton Tablelands**, **Bundaberg** and the **Lockyer Valley** in Queensland.



Source: ASPGA



## 2018/19 Fresh Sweetpotatoes Production by State



Source: ASPGA

## Fresh Sweetpotatoes Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	11,132												
Queensland	89,053												
Western Australia	1,012												
Availability legend		High		Medium		Low		None					

Source: ASPGA

## Main Sweetpotato Varieties

There are four 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 **2%** of fresh production.



**White sweetpotatoes**, also known as Kestle which has a white skin, with white flesh. White sweetpotatoes accounted for **1%** of fresh production.

## Seasonality by Sweetpotato variety

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

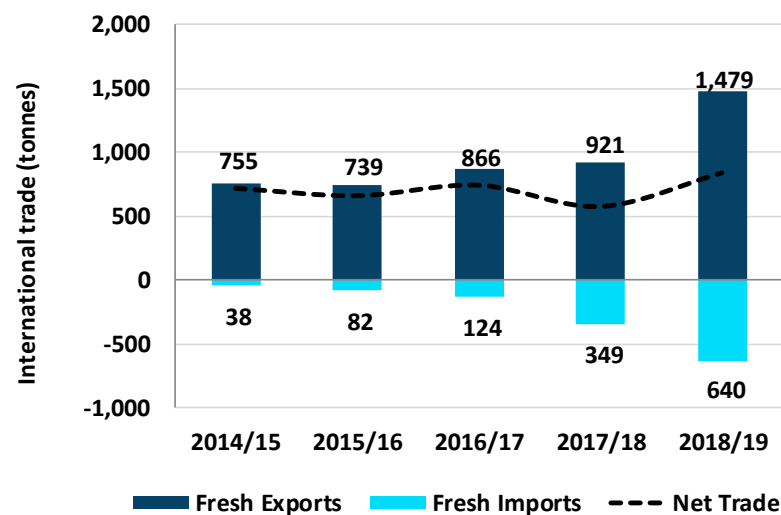
Variety	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Gold	91,077												
Red	7,084												
Purple	2,024												
White	1,012												
Availability legend		High		Medium		Low		None					

Source: ASPGA

## Fresh Sweetpotato International Trade

Australia is a net exporter of fresh sweetpotatoes, with smaller amounts of imports. For the year ending June 2019, Australia exported **1,479 tonnes** of fresh sweetpotatoes. The exports and imports over the last 5 financial years is profiled in the graph over the page, where imports are counted as negative tonnes.

## Net Fresh Sweetpotatoes International Trade



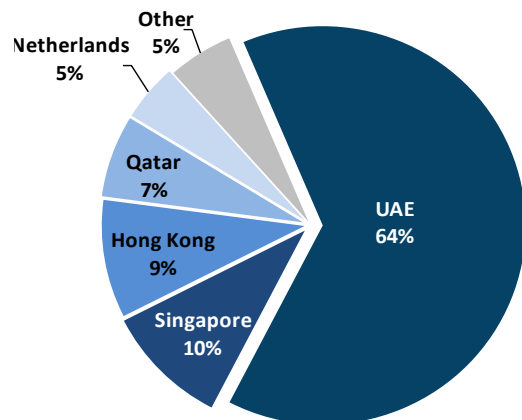
Source: GTA





For the year ending June 2019, **64%** of exported fresh sweetpotatoes were sent to the United Arab Emirates (UAE), as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
Queensland	19	266	530	Queensland	567	697	1,274
New South Wales	89	79	105	New South Wales	91	104	113
Victoria	16	5	5	Victoria	185	116	84
Western Australia	< 0.5	-	-	Western Australia	-	-	5
<b>TOTAL</b>	<b>138</b>	<b>349</b>	<b>640</b>	South Australia	1	4	4
				<b>Other</b>	<b>21</b>	-	-
				<b>TOTAL</b>	<b>866</b>	<b>922</b>	<b>1,479</b>

## Fresh Sweetpotatoes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
China	68	276	555	UAE	423	528	966
Tonga	39	69	82	Singapore	245	141	150
Sth. Korea	2	3	2	Hong Kong	144	143	144
Hong Kong	5	1	1	Qatar	11	35	101
Vietnam	6	-	-	Netherlands	-	-	70
<b>Other</b>	<b>4</b>	<b>&lt; 0.5</b>	<b>&lt; 0.5</b>	<b>Other</b>	<b>42</b>	<b>75</b>	<b>48</b>
<b>TOTAL</b>	<b>124</b>	<b>349</b>	<b>640</b>	<b>TOTAL</b>	<b>866</b>	<b>922</b>	<b>1,479</b>

Source: GTA





## Tomatoes Overview

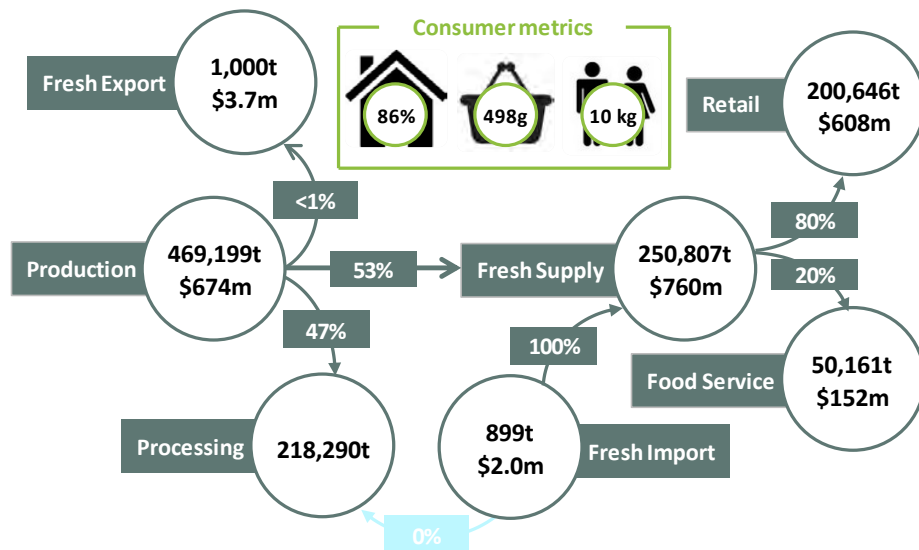
Tomatoes are grown in most states of Australia, with the majority of production occurring in Victoria and Queensland. Traditionally most tomatoes were produced outdoors in Queensland. In recent years, more tomatoes have been grown in high-tech glasshouses.

For the year ending June 2019:

- **485,358 t** was produced with **48%** sent to processing.
- The value of production was **\$676 m** while the wholesale value of the fresh supply was **\$760 m**.
- **86%** of Australian households purchased fresh tomatoes, buying an average of **498 g** of tomatoes per shopping trip.
- The supply per capita was **10 kg**, based on the volume supplied.



## Tomatoes Supply Chain—Year Ending June 2019



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



Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	426,398	484,073	+14%	469,199	-3%
Production (\$m)	\$ 645.2	\$ 609.9	-5%	\$ 674.2	+11%
Production area (Ha)	4,785	4,781	>-1%	-	-
Fresh Export Volume (t)	530	804	+52%	1,000	+24%
Fresh Export Value (\$m)	\$ 2.5	\$ 3.0	+20%	\$ 3.7	+22%
Fresh Import Volume (t)	932	926	>-1%	899	-3%
Fresh Import Value (\$m)	\$ 2.3	\$ 1.8	-22%	\$ 2.0	+13%
Fresh Supply (t)	242,119	256,559	+6%	250,807	-2%
Fresh Supply Wholesale Value (\$m)	\$ 732.5	\$ 687.7	-6%	\$ 760.5	+11%
Supply per Capita (kg)	9.88	10.29	+4%	9.95	-3%

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

## Major Tomato Production Areas

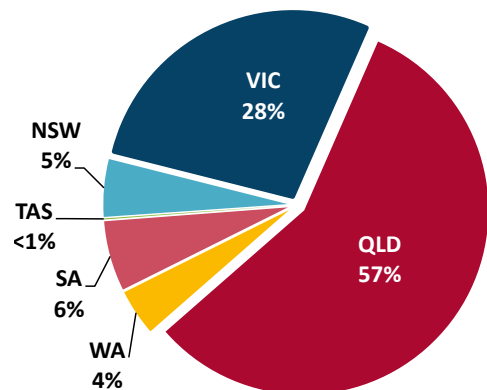
Tomatoes are grown across Australia, typically grown outdoors in Queensland, and in high-tech glasshouses in the southern states. Major production areas include the **Bowen**, **Bundaberg** and the **Lockyer Valley** in Queensland; and the **Goulburn Valley** in Victoria.



Source: AUSVEG



## 2018/19 Fresh Tomatoes Production by State



Source: AUSVEG

## Fresh Tomatoes Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	23,664												
Victoria	129,628												
Queensland	267,443												
Western Australia	19,133												
South Australia	28,878												
Tasmania	452												
Availability legend			High		Medium		Low						

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 **41%** of fresh production for the year ending June 2019.



**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 **35%** of fresh production for the year ending June 2019.

**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 **21%** of fresh production for the year ending June 2019.

**Roma**, including baby roma tomatoes, an oval egg-shaped tomato with red skin. These varieties accounted for **3%** of fresh production for the year ending June 2019.

## Fresh Tomato Seasonality by Type

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

Source: APTRC; AUSVEG; (Freshlogic Analysis)

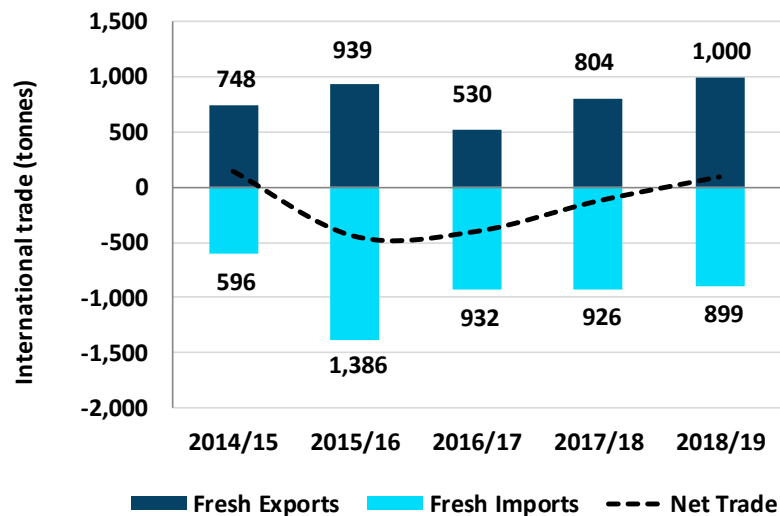
Type	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Field	102,848												
Large Truss	87,818												
Cherry/Grape	52,715												
Roma	7,527												
<b>Processing</b>	<b>218,290</b>												
Availability legend			High		Medium		Low						

## Fresh Tomato International Trade

Australia has traditionally been a net importer of fresh tomatoes. For the year ending June 2019, Australia exported **1,000 tonnes** of fresh tomatoes. The exports and imports over the last 5 financial years is profiled in the graph over the page, where imports are counted as negative tonnes.



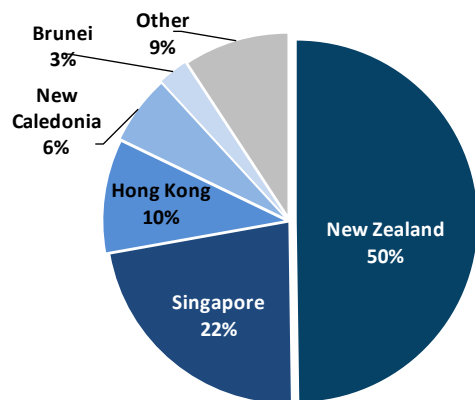
## Net Fresh Tomatoes International Trade



Source: GTA

For the year ending June 2019, **50%** of exported fresh tomatoes were sent to New Zealand, as profiled in the chart below.

## 2018/19 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	2017	2018	2019	Year Ending June	2017	2018	2019
New South Wales	358	307	370	Queensland	455	561	733
Queensland	448	215	358	New South Wales	34	173	213
Victoria	126	404	171	Victoria	32	53	39
<b>TOTAL</b>	<b>932</b>	<b>926</b>	<b>899</b>	Western Australia	5	16	14
				South Australia	2	2	1
				<b>Other</b>	<b>&lt; 0.5</b>	<b>-</b>	<b>&lt; 0.5</b>
				<b>TOTAL</b>	<b>530</b>	<b>804</b>	<b>1,000</b>

## Fresh Tomatoes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2017	2018	2019	Year Ending June	2017	2018	2019
New Zealand	922	926	899	New Zealand	126	239	498
Turkey	10	-	-	Singapore	138	219	224
<b>TOTAL</b>	<b>932</b>	<b>926</b>	<b>899</b>	Hong Kong	45	46	100
				New Caledonia	22	81	60
				Brunei	37	27	26
				<b>Other</b>	<b>161</b>	<b>193</b>	<b>92</b>
				<b>TOTAL</b>	<b>530</b>	<b>804</b>	<b>1,000</b>

Source: GTA





## Fresh Zucchini Overview

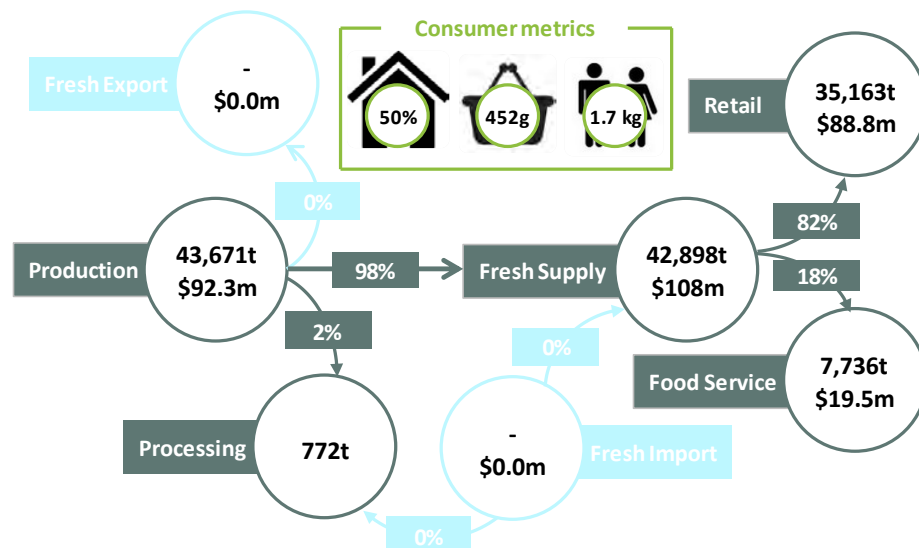
Zucchini is grown in most states of Australia, with the majority of production occurring in Queensland and Victoria.

For the year ending June 2019:

- **43,671 t** produced and valued at **\$92.3 m** with **2%** sent to processing.
- The wholesale value of the fresh supply was **\$108 m**, with **\$88.8 m** distributed into retail and **\$19.5 m** into food service.
- **50%** of Australian households purchased zucchini, buying an average of **452 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 2019



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

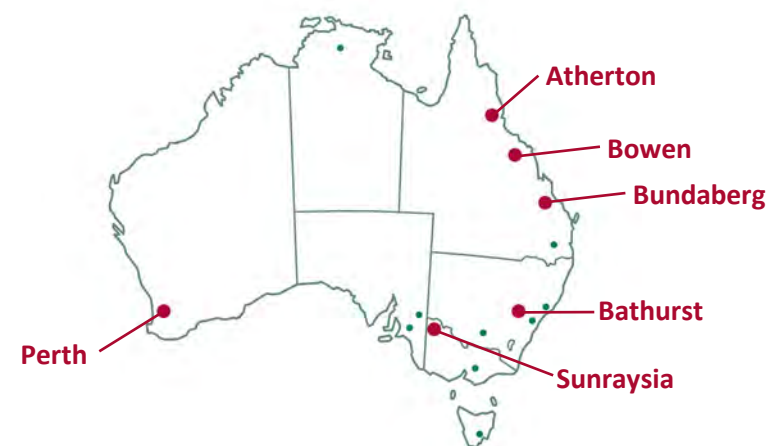


Year Ending June	2017	2018		2019	
	Value	Value	% YoY	Value	% YoY
Production (t)	37,580	40,063	+7%	43,671	+9%
Production (\$m)	\$ 70.9	\$ 72.0	+2%	\$ 92.3	+28%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$ -	\$ -	-	\$ -	-
Fresh Supply (t)	36,916	39,355	+7%	42,898	+9%
Fresh Supply Wholesale Value (\$m)	\$ 83.3	\$ 84.6	+2%	\$ 108.4	+28%
Supply per Capita (kg)	1.51	1.58	+5%	1.70	+8%

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

## Major Zucchini Production Areas

Zucchini is grown across Australia. Major production areas include the **Atherton Tablelands**, **Bowen** and **Bundaberg regions** in Queensland; the **Bathurst region** in New South Wales; the **Sunraysia region** in Victoria; and the **Perth region** of Western Australia.

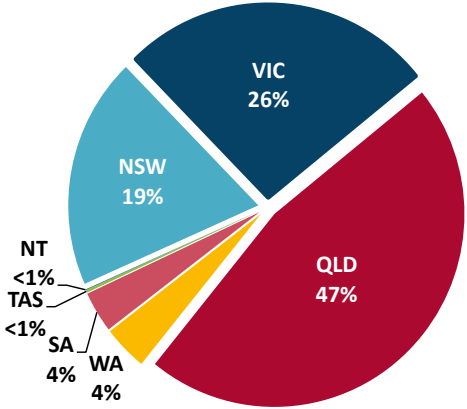


Source: AUSVEG





2018/19 Fresh Zucchini Production by State



Source: AUSVEG

Fresh Zucchini Seasonality by State

State	18/19 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,471												
Victoria	11,538												
Queensland	20,381												
Western Australia	1,650												
South Australia	1,511												
Tasmania	97												
Northern Territory	23												
Availability legend			High		Medium			Low					

Source: AUSVEG

