

THE AUSTRALIAN FOODSERVICE MARKET FOR MUSHROOMS

MARKET SIZE



Private report prepared for Hort Innovation
July 2019



1

MARKET SIZE - MUSHROOMS



MARKET SIZE DATABASE INDEX PAGE



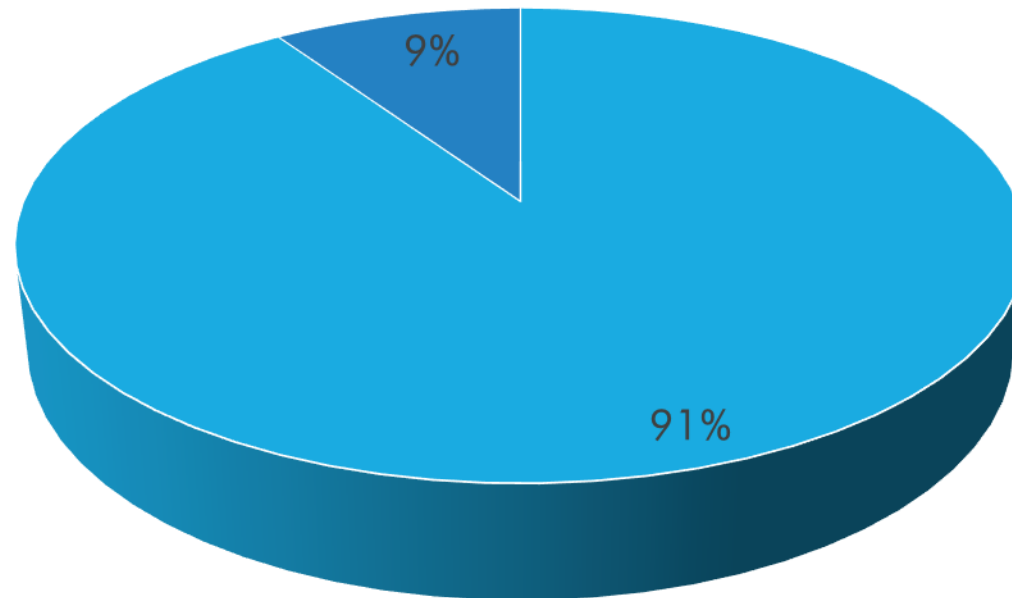
1	Title	TOTAL MARKET SIZE BY VOLUME	TOTAL MARKET SIZE BY VOLUME
	Units	Kilos	
	Detail	Broken down by product category & product	
2	Title	COMMERCIAL MARKET SIZE BY VOLUME	COMMERCIAL MARKET SIZE BY VOLUME
	Units	Kilos	
	Detail	Broken down by product and commercial channel	
3	Title	INSTITUTIONAL MARKET SIZE BY VOLUME	INSTITUTIONAL MARKET SIZE BY VOLUME
	Units	Kilos	
	Detail	Broken down by product and institutional channel	
4	Title	TOTAL MARKET VALUE	TOTAL MARKET VALUE
	Units	Wholesale Price in AUD	
	Detail	Broken down by product category and product	
5	Title	COMMERCIAL MARKET VALUE	COMMERCIAL MARKET VALUE
	Units	Wholesale Price in AUD	
	Detail	Broken down by product and commercial channel	
6	Title	INSTITUTIONAL MARKET VALUE	INSTITUTIONAL MARKET VALUE
	Units	Wholesale Price in AUD	
	Detail	Broken down by product and institutional channel	
7	Title	PRODUCT CONSUMPTION INDEX (PCI)	PRODUCT CONSUMPTION INDEX (PCI)
	Units	Average volume of product used per outlet in kilos weekly	
	Detail	Broken down by channel	

MUSHROOM TYPES INCLUDED IN THE RESEARCH STUDY



MAIN CATEGORIES & PRODUCTS
MUSHROOMS
White Button - Whole
White Cup - Whole
White Flat/Large Open - Whole
Swiss Brown - Whole
Portobello/Open Swiss - Whole
White - Sliced
Brown - Sliced
TOTAL

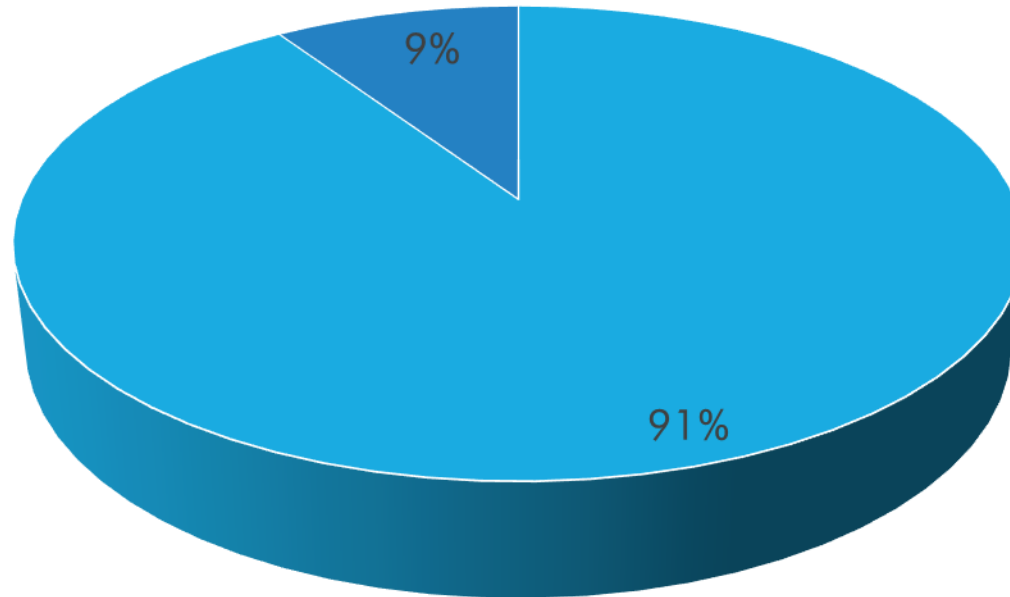
Grand Total Volume - Mushrooms



■ COMMERCIAL ■ INSTITUTIONAL

- ❖ When it comes to the use of Mushrooms within the Australian Foodservice market, the Commercial sector has a share of 91%, equating to 8.4 million kilograms.

Grand Total Value - Mushrooms

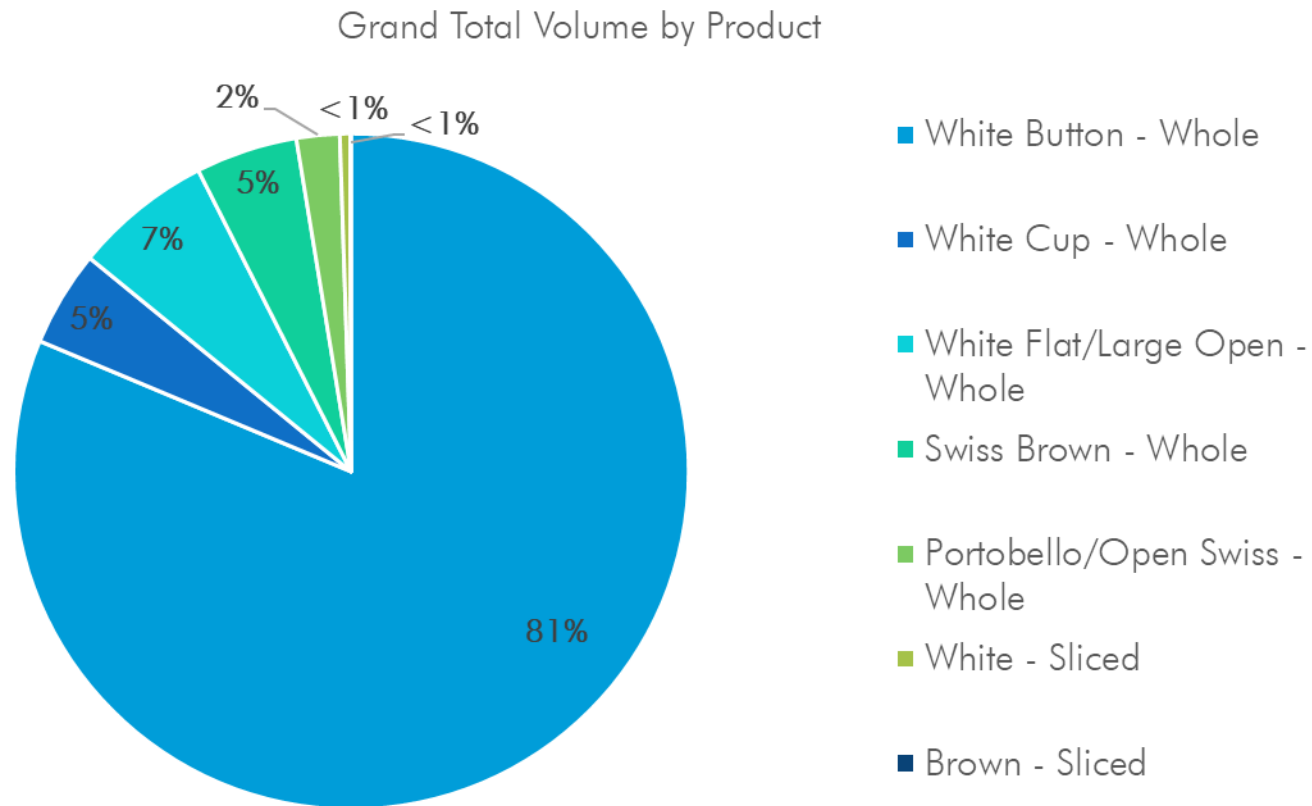


■ COMMERCIAL ■ INSTITUTIONAL

- ❖ The Commercial sector accounts for 91% of all Mushrooms used in the Australian Foodservice market, equating to A\$53.1 million.

TOTAL VOLUME BY PRODUCT

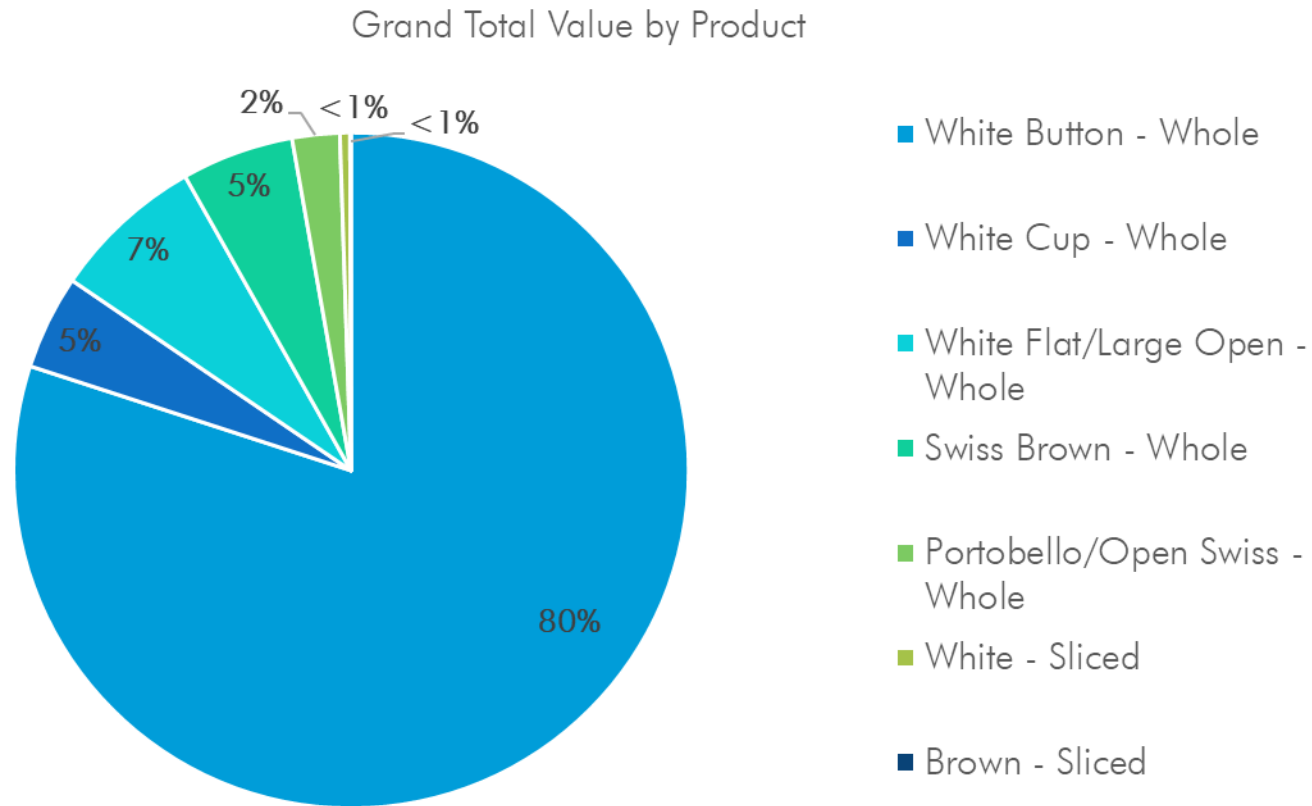
9.2 mill kgs



- ❖ The most commonly used mushroom type is White Button – Whole with a market share of 81%.
- ❖ The use of Sliced Mushrooms, both White & Brown, is extremely minimal (<1%), showing that both Commercial as well as Institutional operators cannot justify the extra cost of this pre-prepared product.

TOTAL VALUE BY PRODUCT

58.6 mill AUD



❖ White Button – Whole Mushrooms account for 80% of total foodservice value with A\$46.9 million.

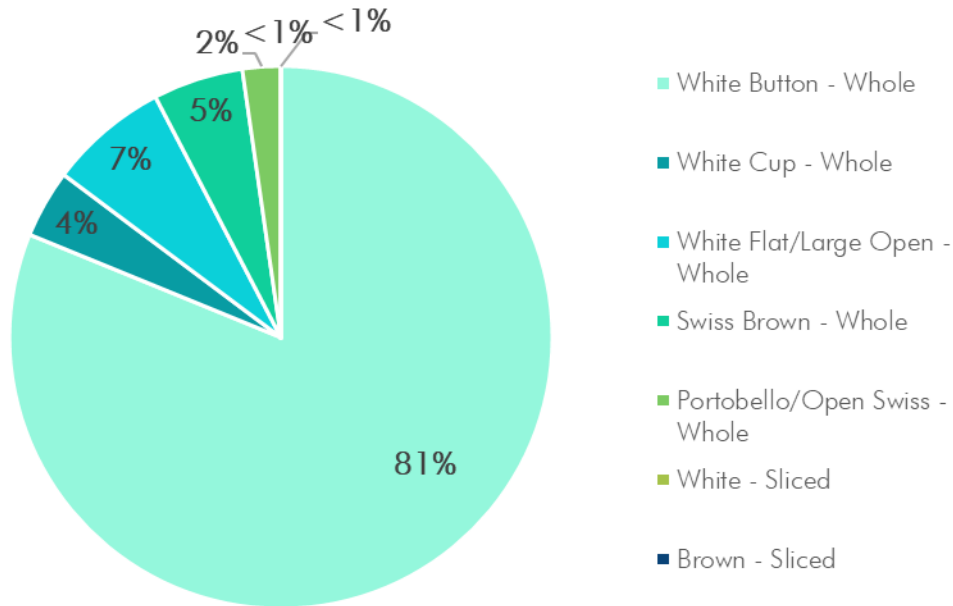
TOTAL VOLUME BY PRODUCT BY SECTOR



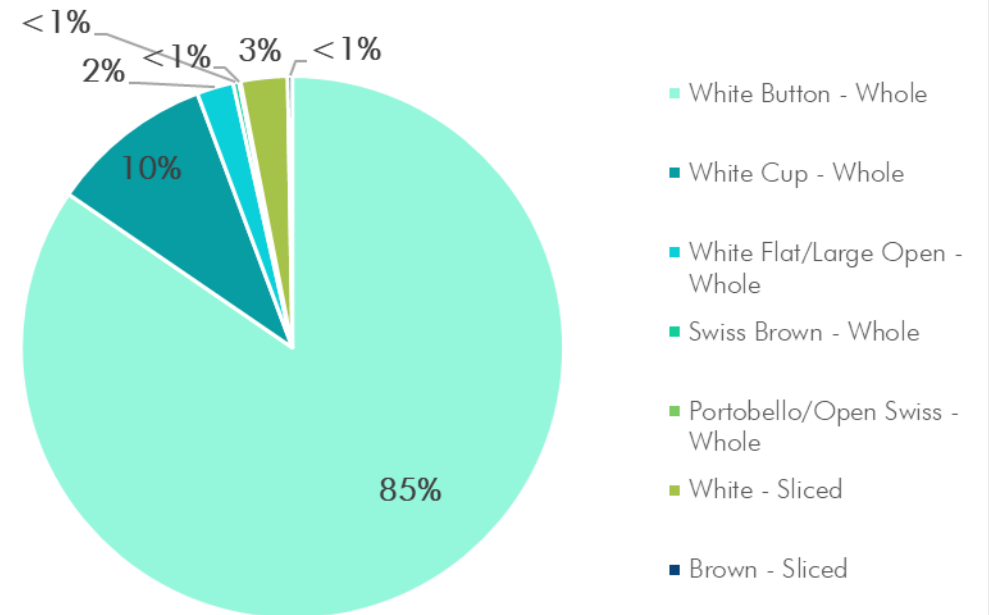
8.4 mill kgs

0.9 mill kgs

Total Volume by Product - Commercial



Total Volume by Product - Institutional

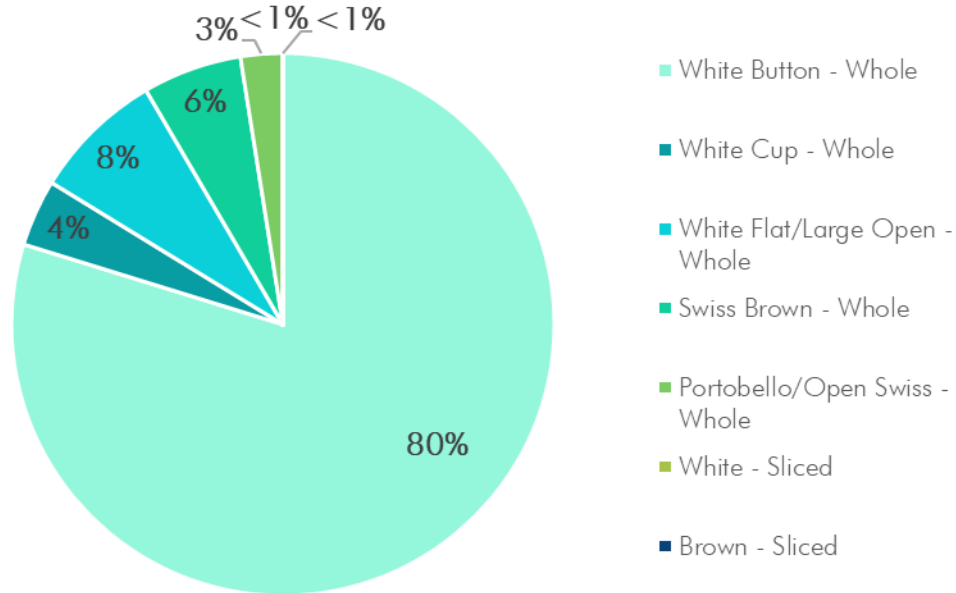


TOTAL VALUE BY PRODUCT BY SECTOR



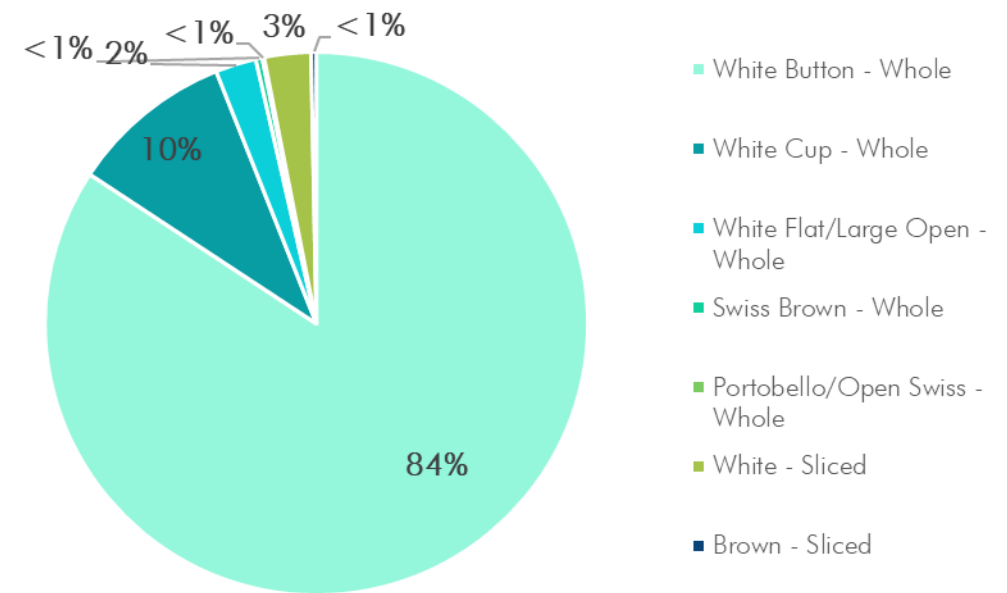
53.1 mill AUD

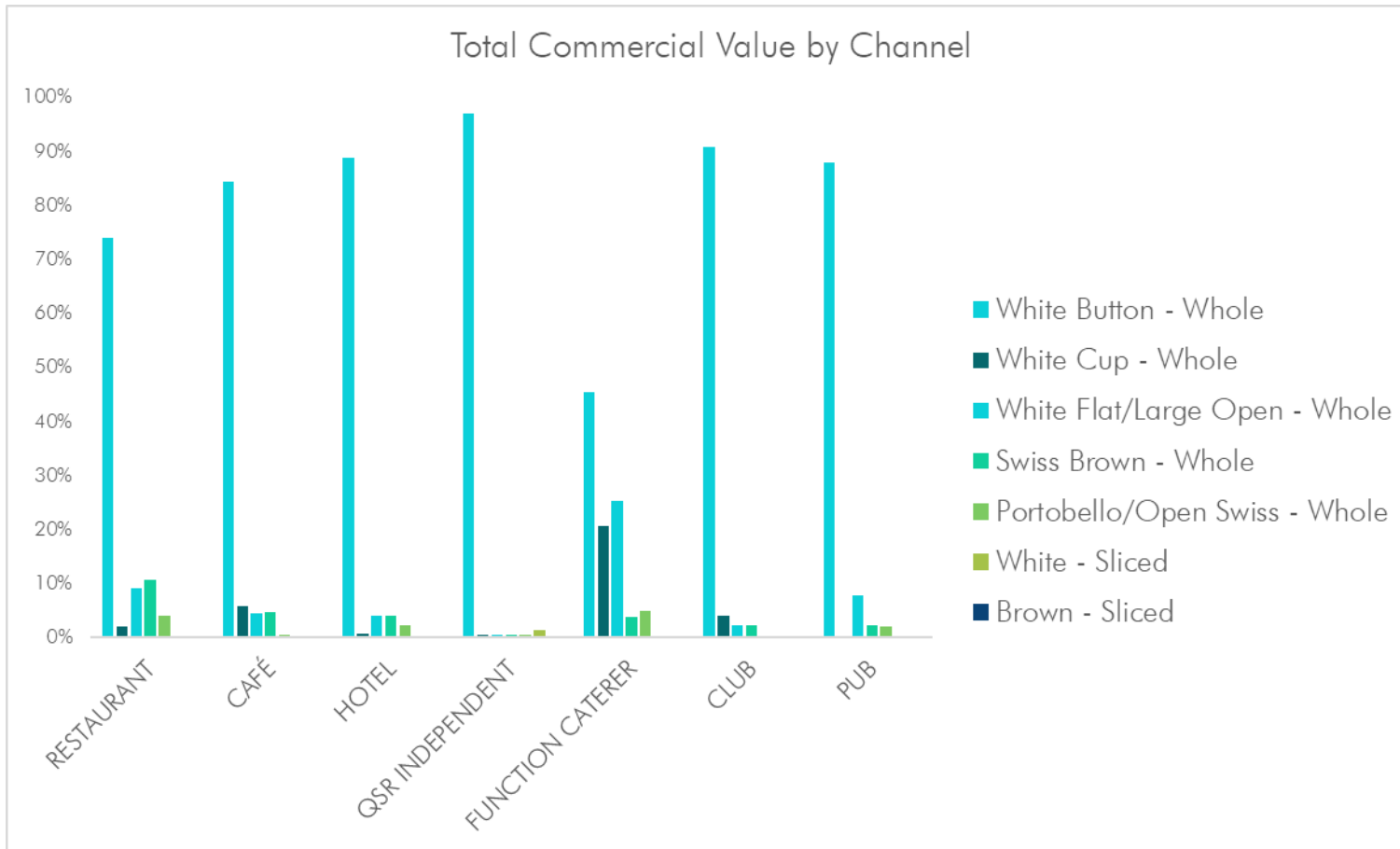
Total Value by Product - Commercial



5.5 mill AUD

Total Value by Product - Institutional





❖ With the exception of Function Caterers, who use a reasonable amount of White Cup – Whole and White Flat/Large Open – Whole, all other Commercial outlets predominantly use White Button – Whole.

Please see next slide for actual percentages.

TOTAL COMMERCIAL VOLUME BY CHANNEL



MUSHROOM TYPE	RESTAURANT	CAFÉ	HOTEL	QSR INDEP.	FUNCTION CATERER	CLUB	PUB
White Button - Whole	76%	85%	90%	97%	47%	91%	89%
White Cup - Whole	2%	6%	1%	1%	21%	4%	<1%
White Flat/Large Open - Whole	8%	4%	4%	<1%	23%	2%	7%
Swiss Brown - Whole	10%	4%	4%	<1%	4%	2%	2%
Portobello/Open Swiss - Whole	4%	<1%	2%	<1%	5%	<1%	2%
White - Sliced	<1%	<1%	0%	1%	0%	0%	<1%
Brown - Sliced	0%	0%	<1%	0%	0%	<1%	0%

HIGHEST INCIDENCE OF MUSHROOMS BY PRODUCT TYPE BY COMMERCIAL CHANNEL :

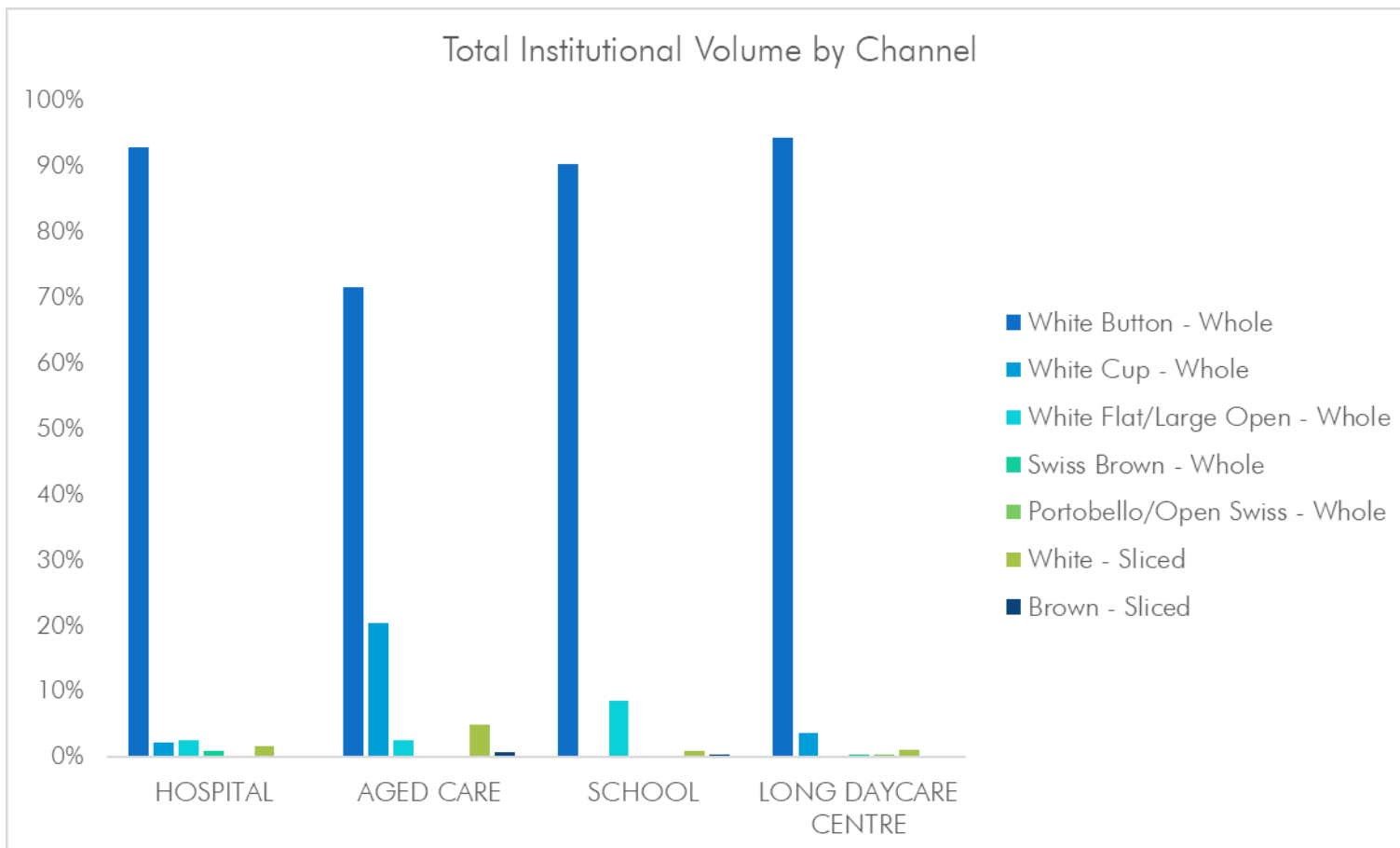
White Button/Whole: QSR Independents

White Cup/Whole: Function Caterers

White Flat/Large Open/Whole: Function Caterers

Swiss Brown/Whole: Restaurants

Portobello/Open Swiss/Whole: Function Caterers



❖ The only slight difference across the institutions is that within the Aged Care channel they use 20% of White Cup – Whole, while all other channels use at least 90% of White Button – Whole. This is also outlined in the table on the next slide.

MUSHROOM TYPE	HOSPITAL	AGED CARE	SCHOOL	LONG DAYCARE CENTRE
White Button - Whole	93%	72%	90%	94%
White Cup - Whole	2%	20%	0%	4%
White Flat/Large Open - Whole	2%	3%	9%	<1%
Swiss Brown - Whole	1%	0%	0%	<1%
Portobello/Open Swiss - Whole	0%	0%	0%	<1%
White - Sliced	2%	5%	1%	1%
Brown - Sliced	0%	1%	<1%	0%



SUCCESS BASED ON SOUND INSIGHT

Phone 1300 66 7274 www.FIForesight.com info@FIForesight.com