

# THE AUSTRALIAN FOODSERVICE MARKET FOR MUSHROOMS

## MARKET SIZE



**Private report prepared for Hort Innovation**  
**July 2019**



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# 1 GRAND TOTAL OVERVIEW



# MARKET SIZE DATABASE INDEX PAGE

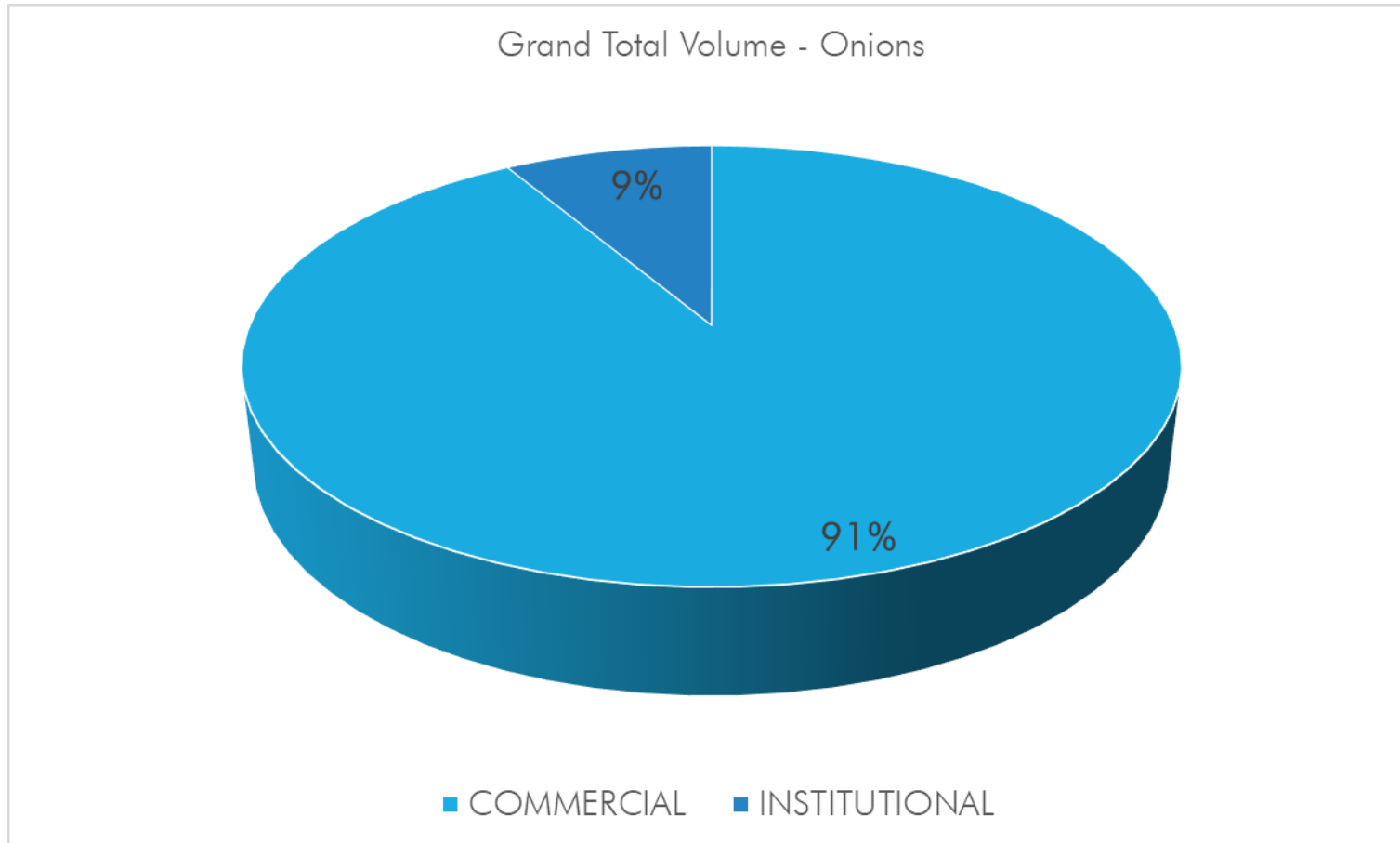


1	Title	<b>TOTAL MARKET SIZE BY VOLUME</b>	<b>TOTAL MARKET SIZE BY VOLUME</b>
	Units	Kilos	
	Detail	Broken down by product category & product	
2	Title	<b>COMMERCIAL MARKET SIZE BY VOLUME</b>	<b>COMMERCIAL MARKET SIZE BY VOLUME</b>
	Units	Kilos	
	Detail	Broken down by product and commercial channel	
3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



# GRAND TOTAL VOLUME - ONIONS

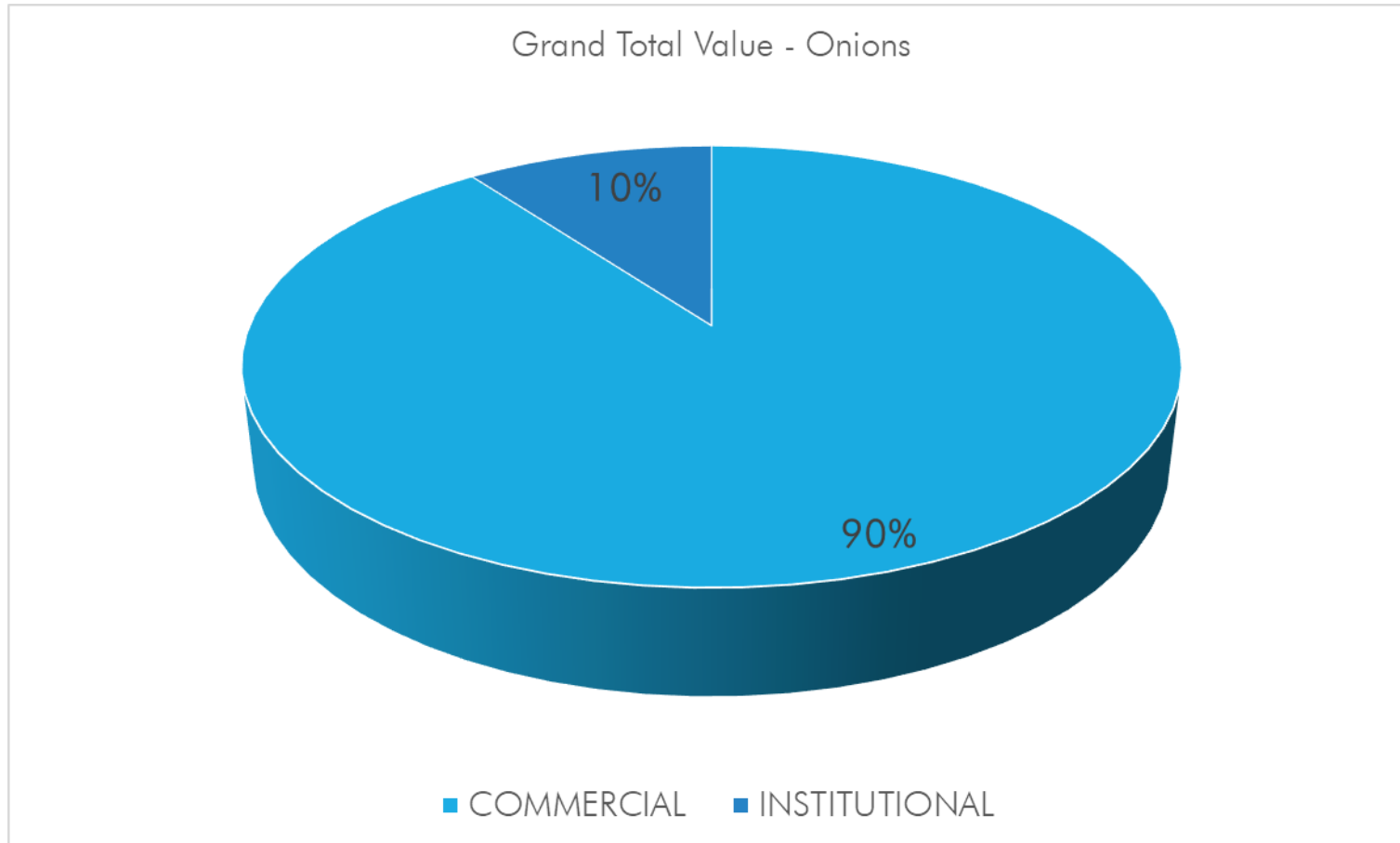
41.4 mill kgs



- ❖ Not surprisingly, 91% of Onions used in the Australian Foodservice market are within the Commercial sector; totaling 37.9 million kilograms.

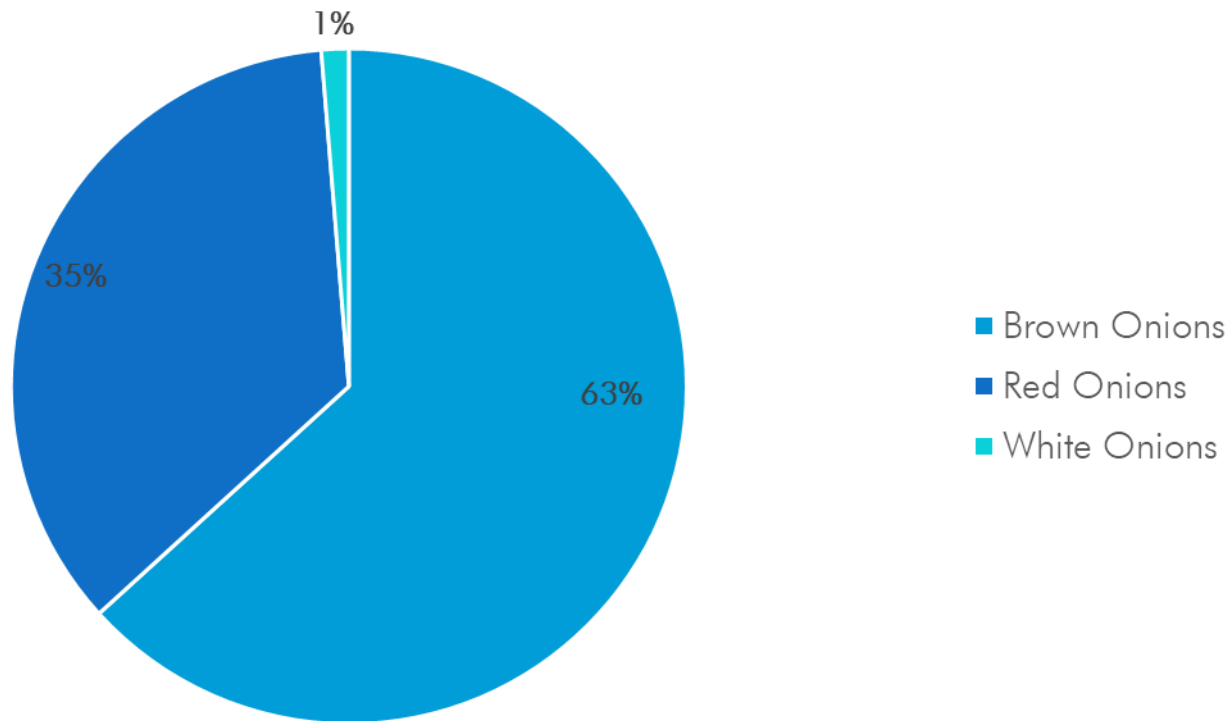
# GRAND TOTAL VALUE - ONIONS

39.5 mill AUD



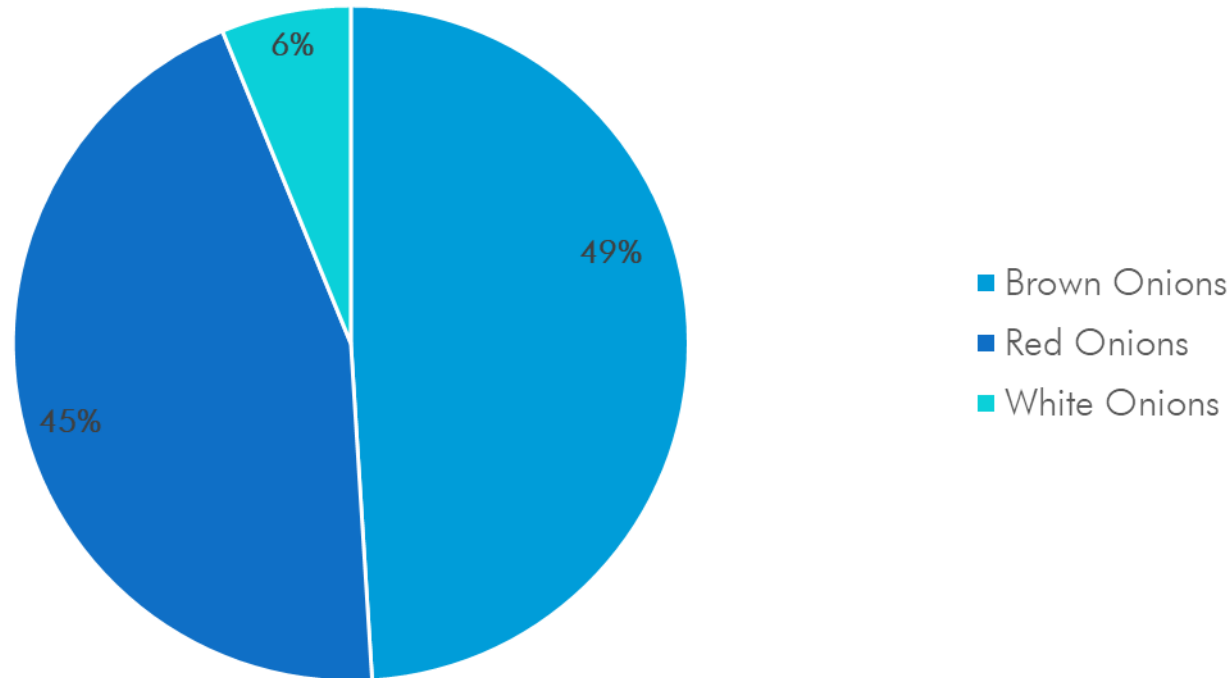
- ❖ The total value of Onions in the Australian Foodservice market is 39.5 million AUD.

Grand Total Volume by Product



- ❖ The use of Onions across both Commercial & Institutional outlets is dominated by Brown Onions with 63% volume share.
- ❖ White Onions across both sectors has a minimal market share.

Grand Total Value by Product



- ❖ The percentage share of value for both Red & White Onions increases from that of the volume share due to the higher cost of these onions compared to Brown Onions.

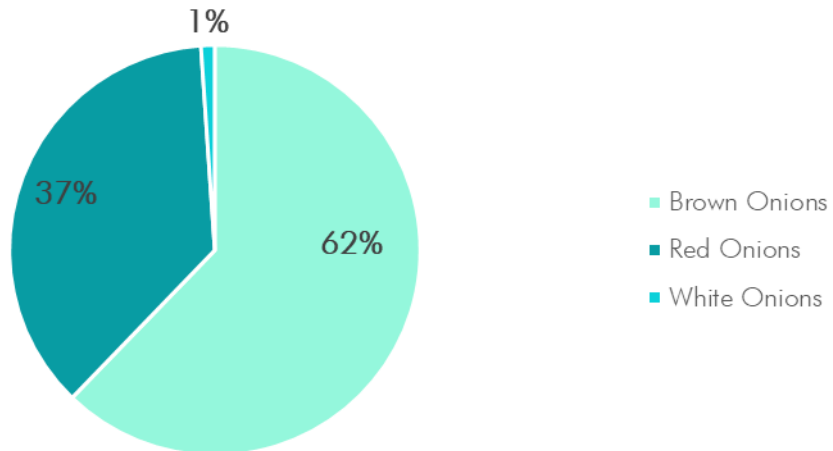


# TOTAL VOLUME BY PRODUCT TYPE BY SECTOR



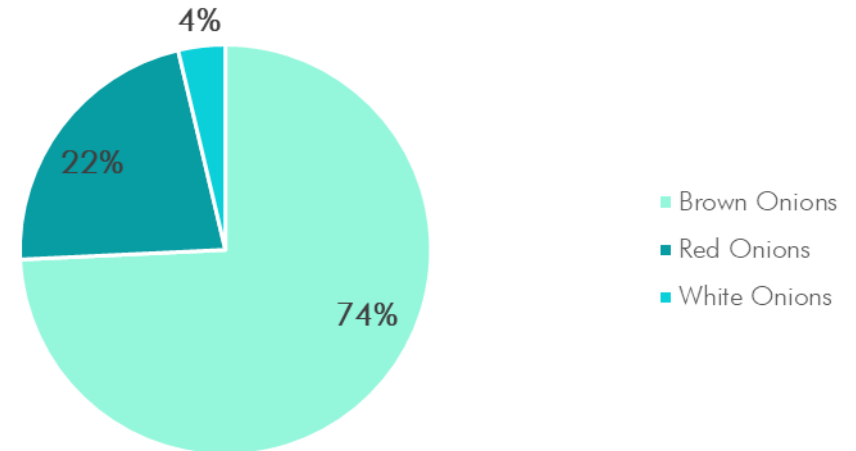
37.9 mill kgs

Total Volume by Product - Commercial



3.5 mill kgs

Total Volume by Product - Institutional

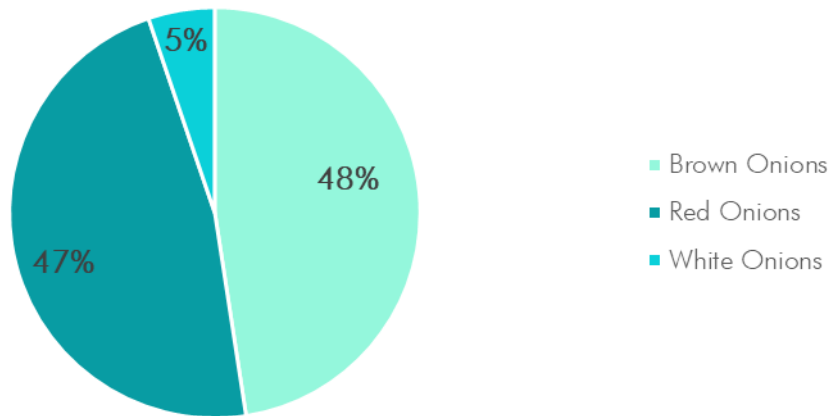


# TOTAL VALUE BY PRODUCT CATEGORY BY SECTOR



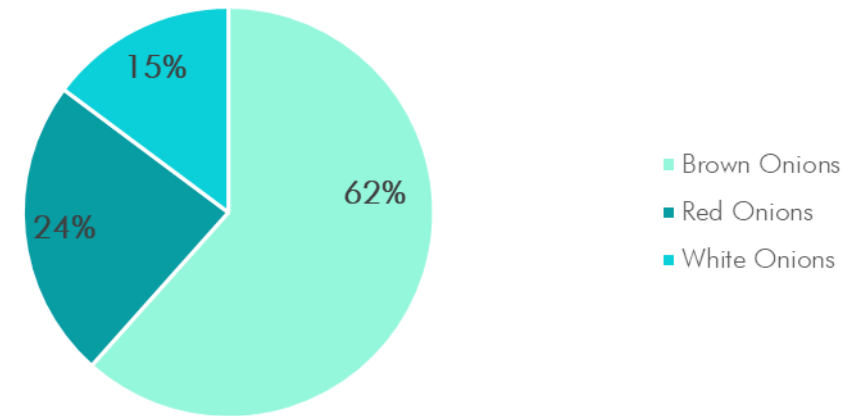
35.5 mill AUD

Total Value by Product - Commercial



4.0 mill AUD

Total Value by Product - Institutional





2

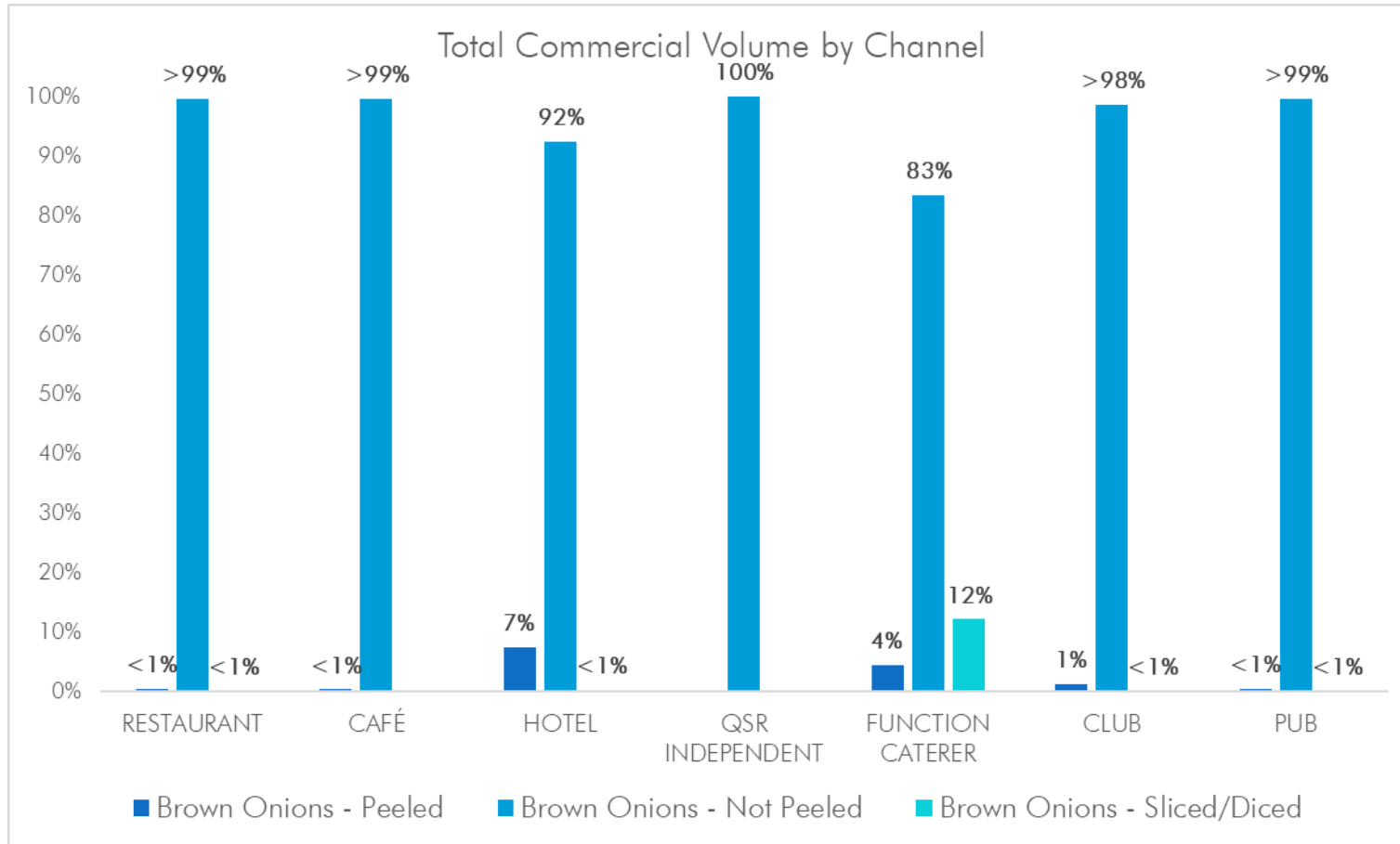
## BROWN ONIONS





# TOTAL COMMERCIAL VOLUME BY CHANNEL BROWN ONIONS

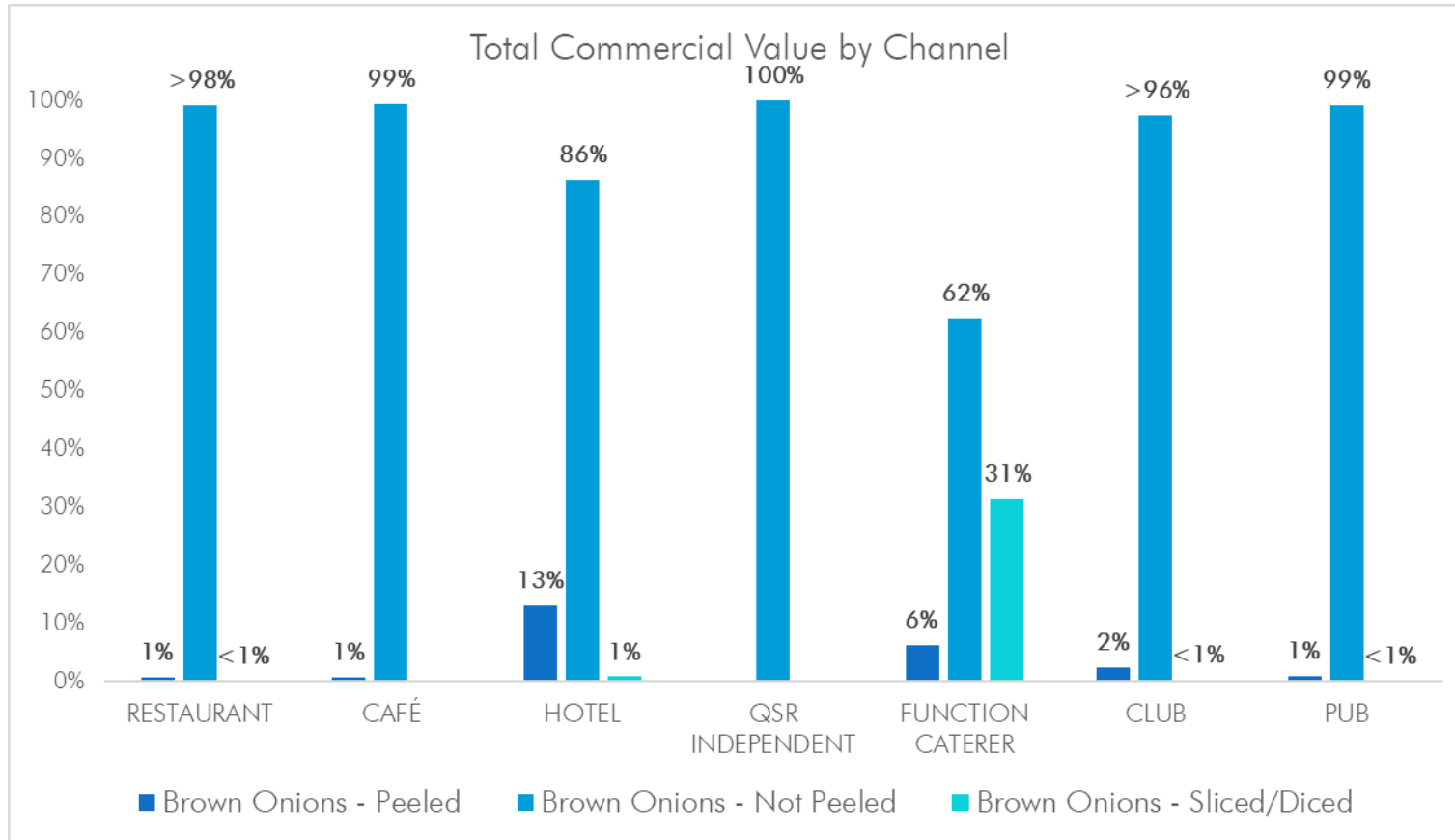
23.6 mill kgs



- ❖ Across all Commercial channels, Brown Onions – Not Peeled have a significant market share, with only one channel, Function Caterers, being under 90%.
- ❖ This indicates that the additional cost of purchasing either a peeled or sliced/diced product cannot be justified.

# TOTAL COMMERCIAL VALUE BY CHANNEL BROWN ONIONS

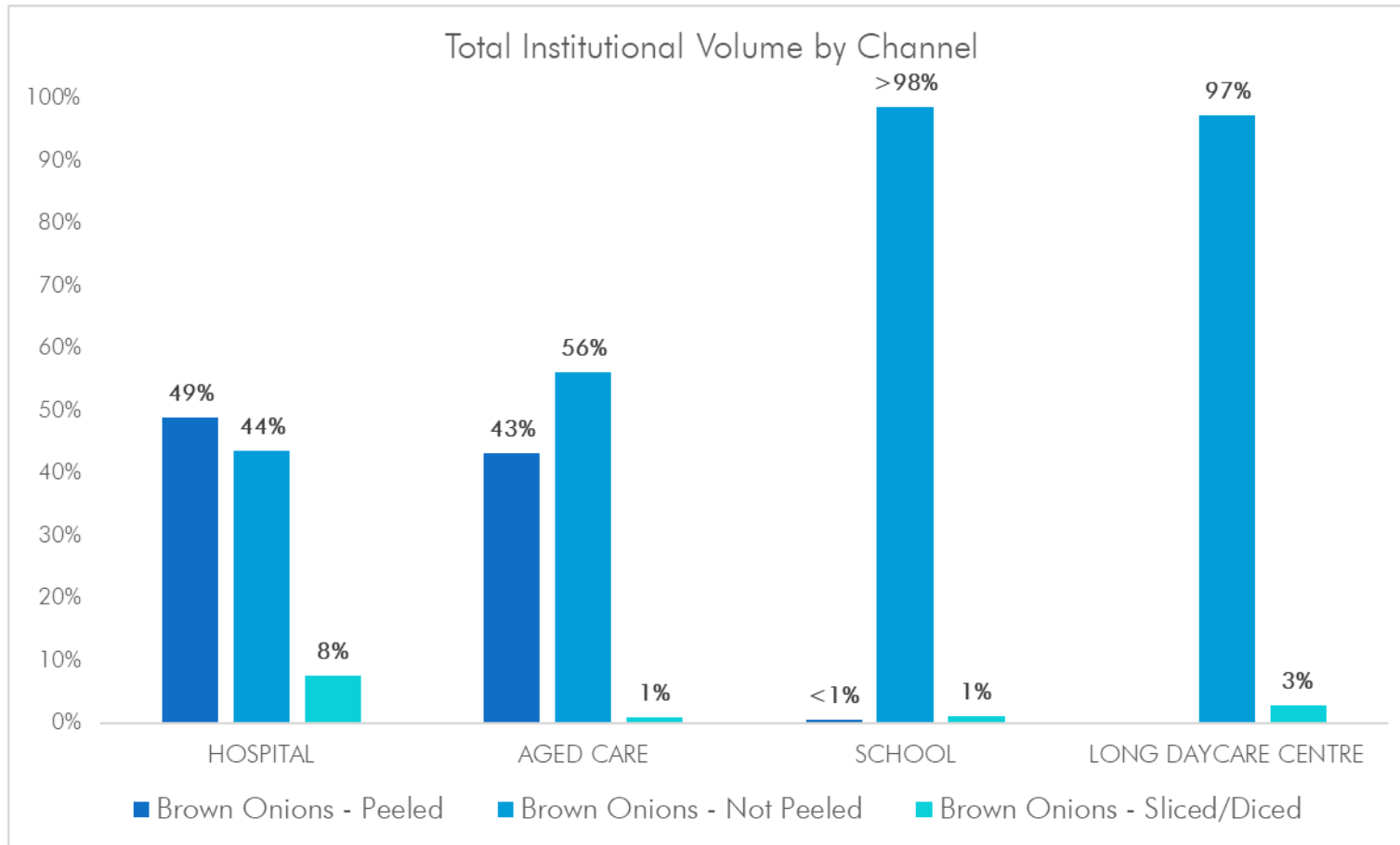
16.9 mill AUD



- ❖ Little variance from the volume percentages to the value shares with the exception of Function Caterers with 31% Brown Onions – Sliced/Diced.
- ❖ Again, this is due to the significantly higher cost of this product.

# TOTAL INSTITUTIONAL VOLUME BY CHANNEL BROWN ONIONS

2.6 mill kgs

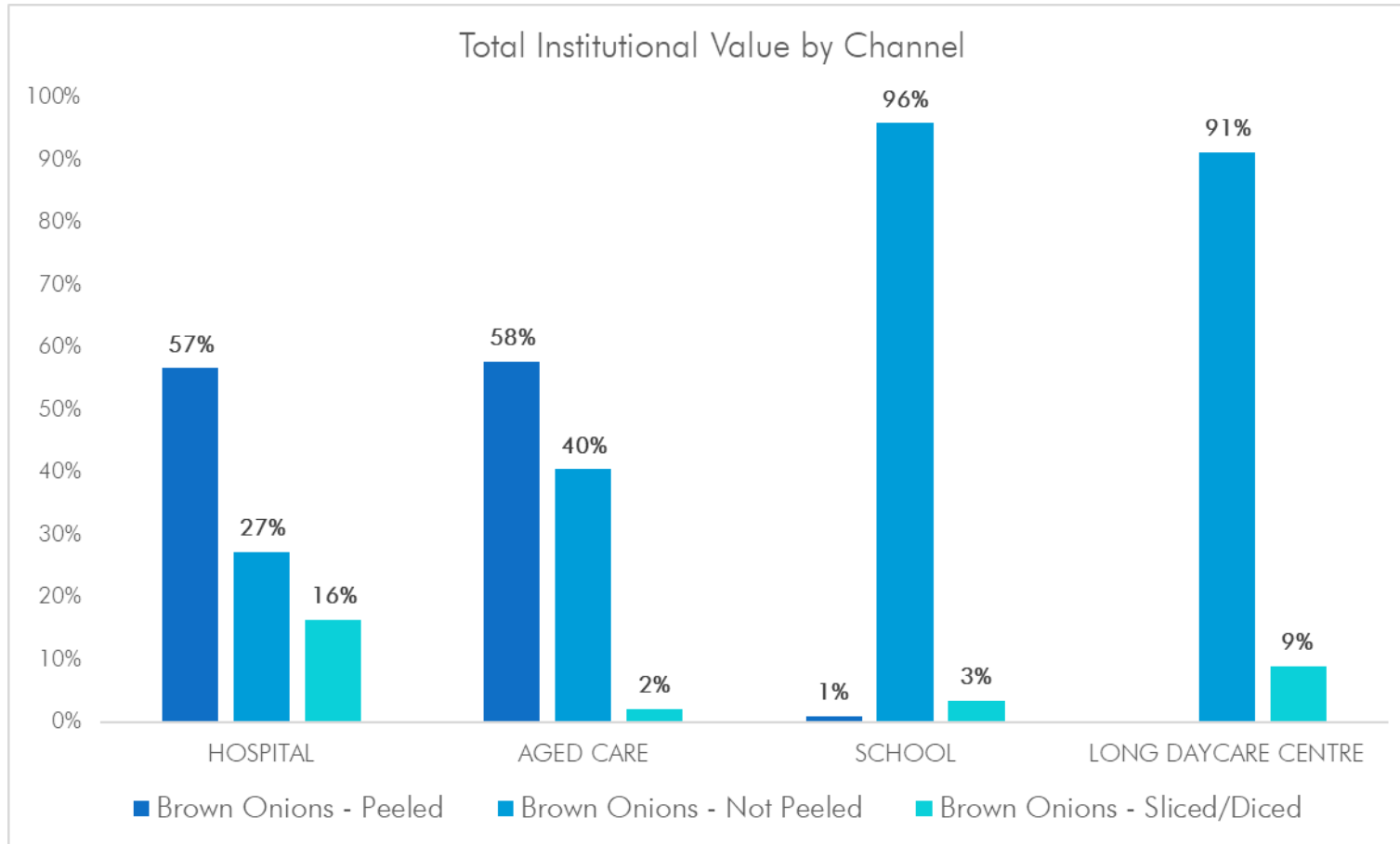


❖ Not surprisingly, given the quantity of food preparation for both Hospitals & Aged Care, they have close to half of their Brown Onions purchased already peeled.



# TOTAL INSTITUTIONAL VALUE BY CHANNEL BROWN ONIONS

2.5 mill AUD



❖ Unlike any other channel both Institutional and Commercial, Hospitals & Aged Care have the greatest value in Brown Onions – Peeled.



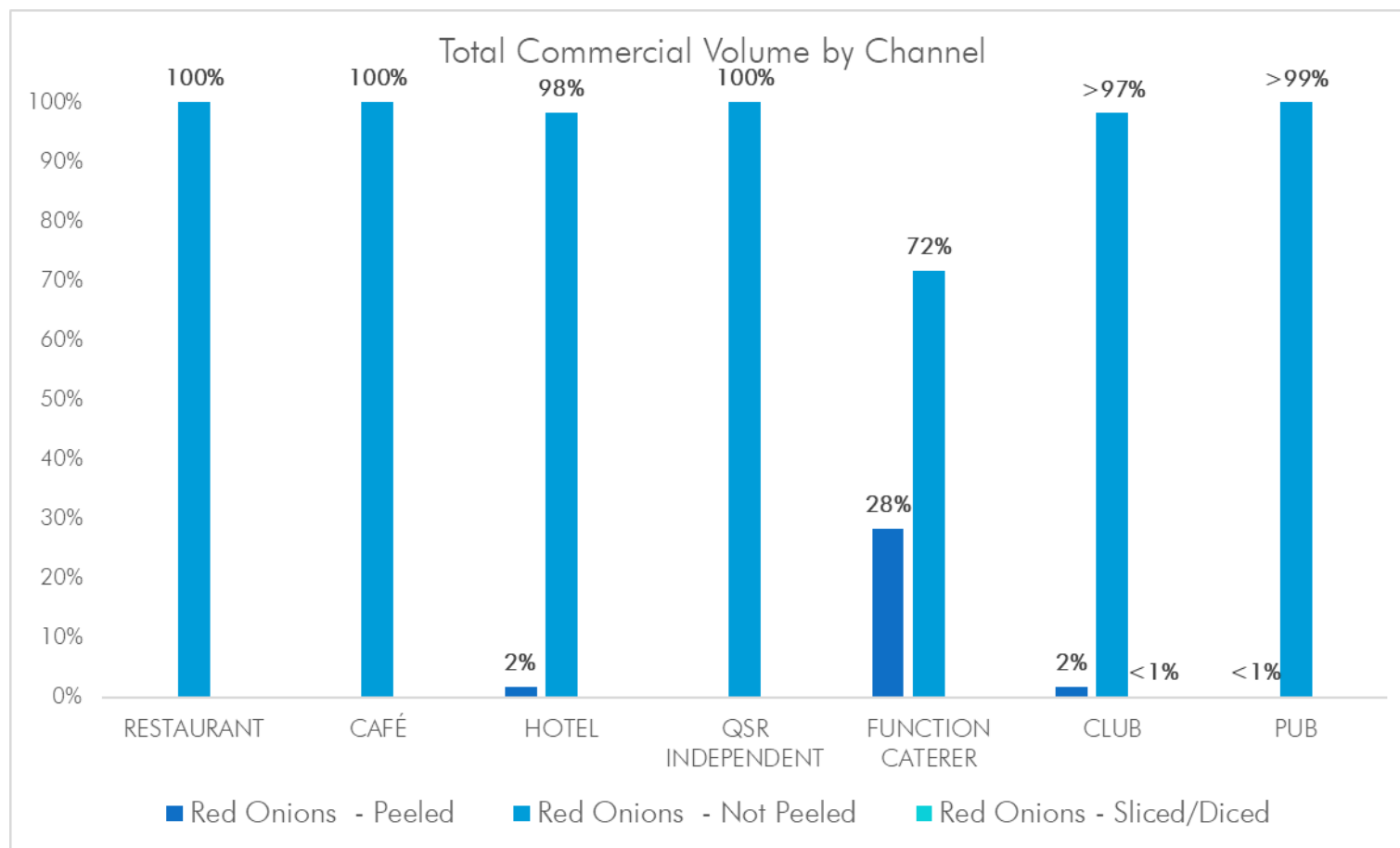
3

## RED ONIONS



# TOTAL COMMERCIAL VOLUME BY CHANNEL RED ONIONS

13.9 mill kgs

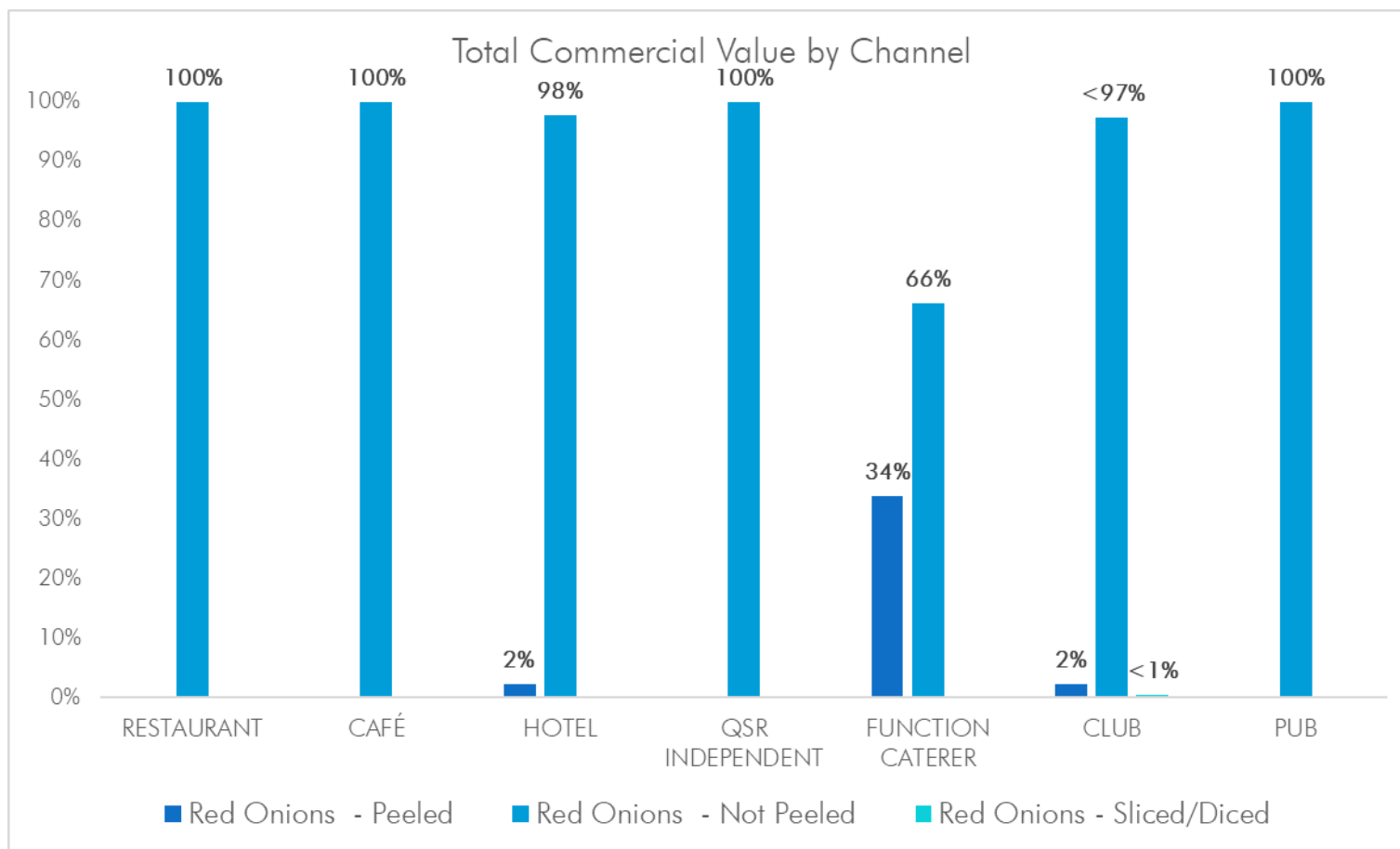


❖ With the exception of Function Caterers who purchase 28% of their Red Onions peeled, all other Commercial channels mainly purchase them not peeled.



# TOTAL COMMERCIAL VALUE BY CHANNEL RED ONIONS

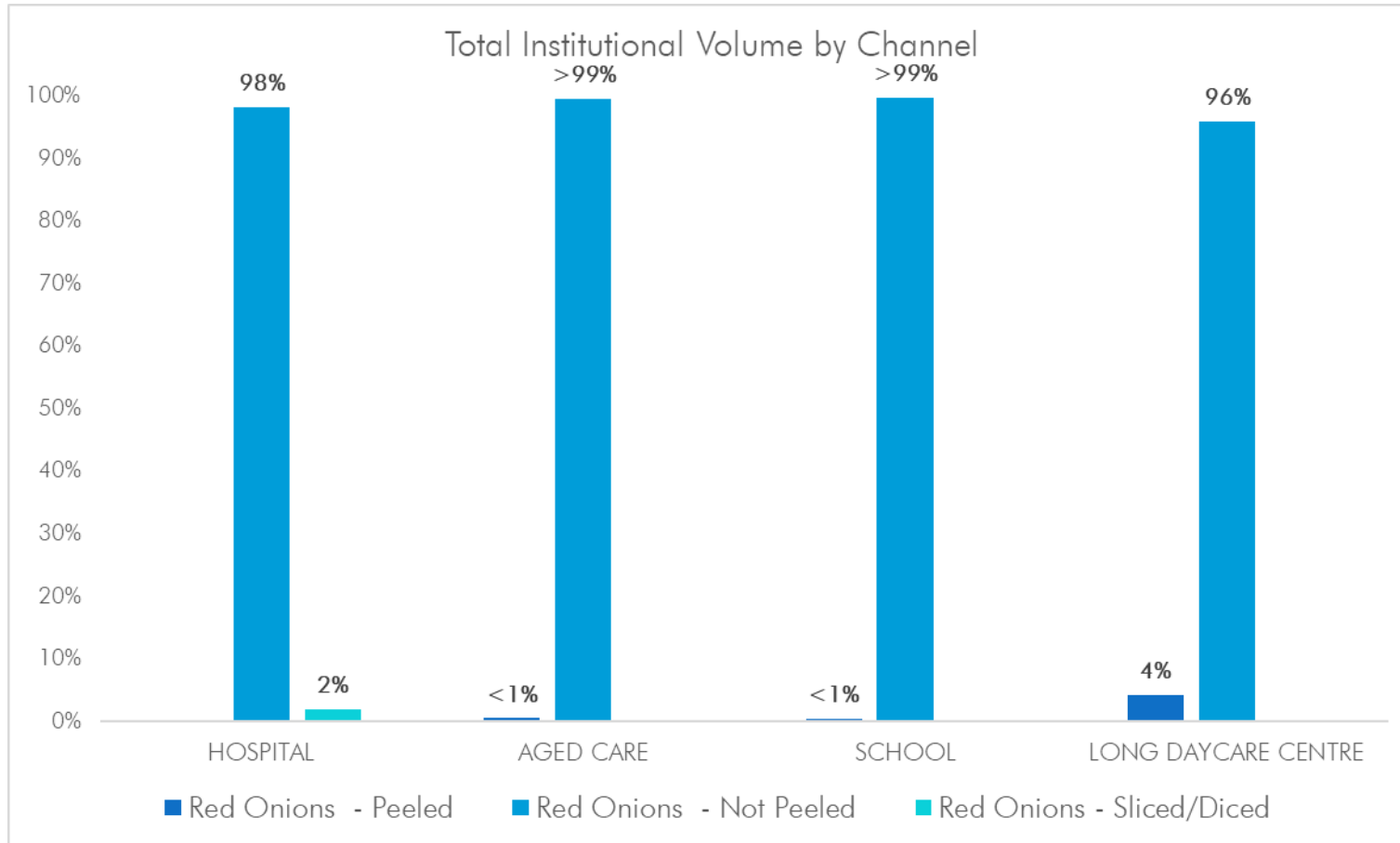
16.7 mill AUD



❖ Interestingly, only three Commercial channels use semi prepared Red Onions equating to less than 2% of the total value.

# TOTAL INSTITUTIONAL VOLUME BY CHANNEL RED ONIONS

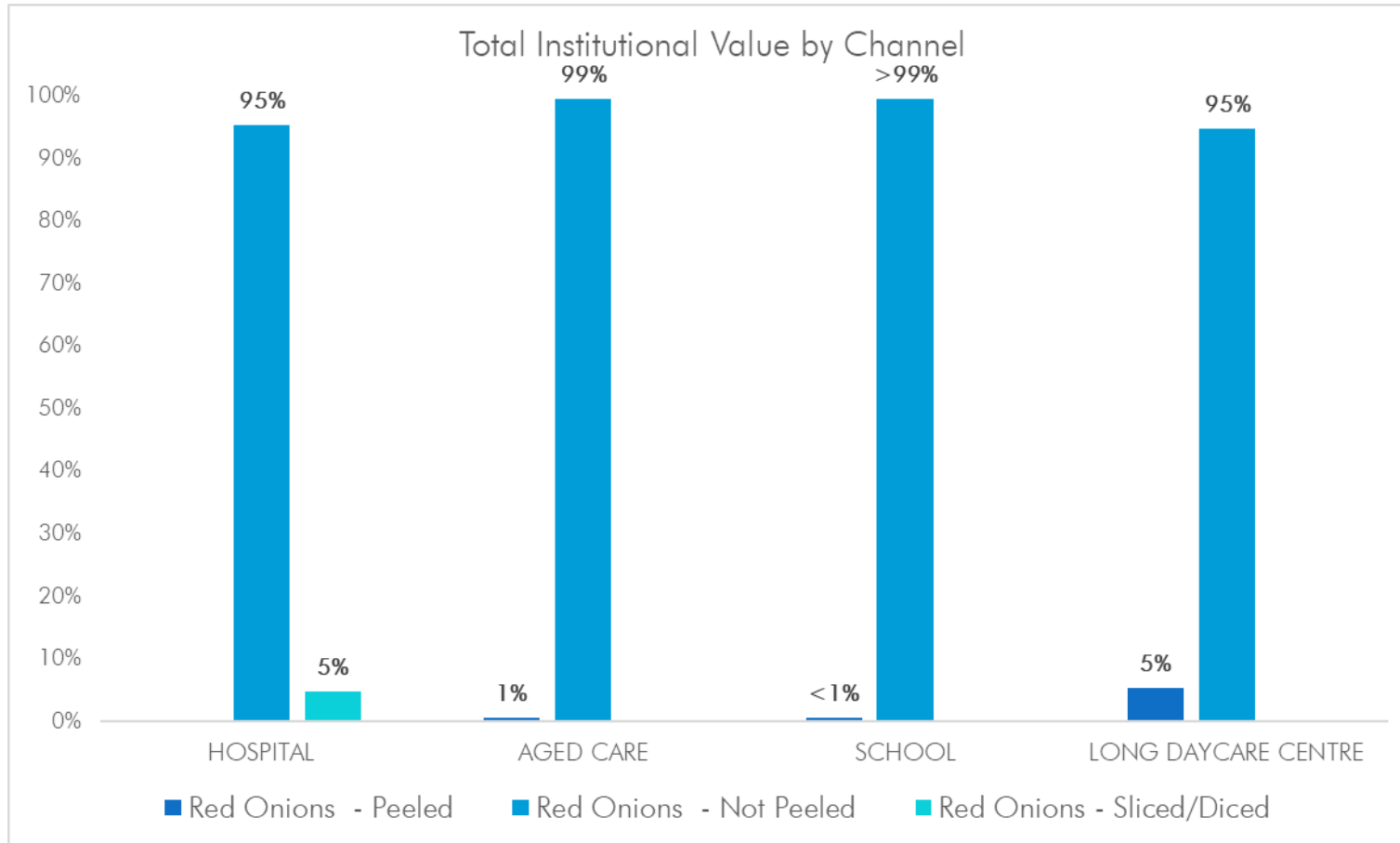
0.8 mill kgs



❖ Albeit, form a very low base, all institutions mainly use Red Onions – Not Peeled.

# TOTAL INSTITUTIONAL VALUE BY CHANNEL RED ONIONS

0.9 mill AUD



❖ Similarly, to the Commercial channels, the value of semi prepared Red Onions in the institutions accounts for less than 2% of the total value.





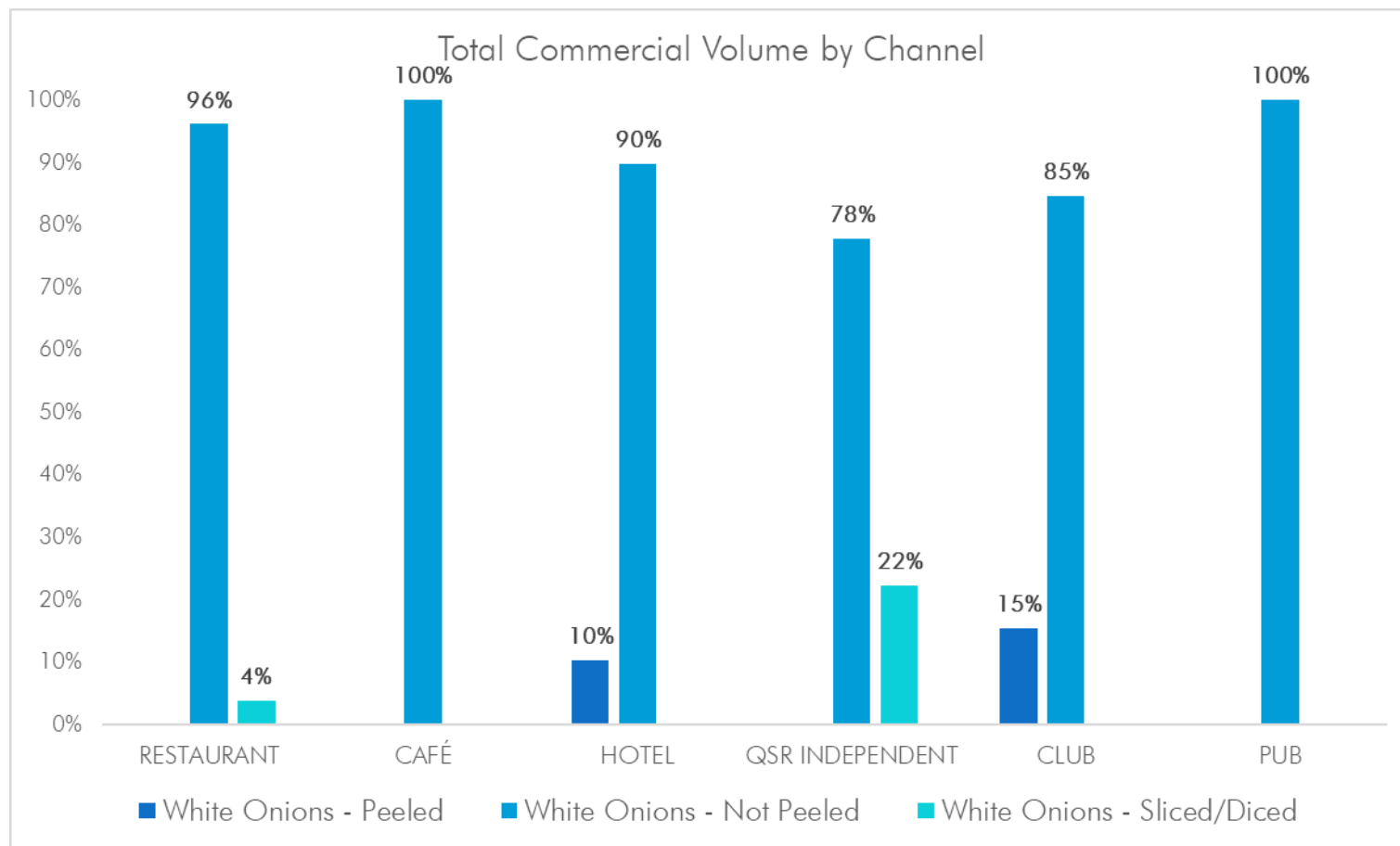
4

## WHITE ONIONS



# TOTAL COMMERCIAL VOLUME BY CHANNEL WHITE ONIONS

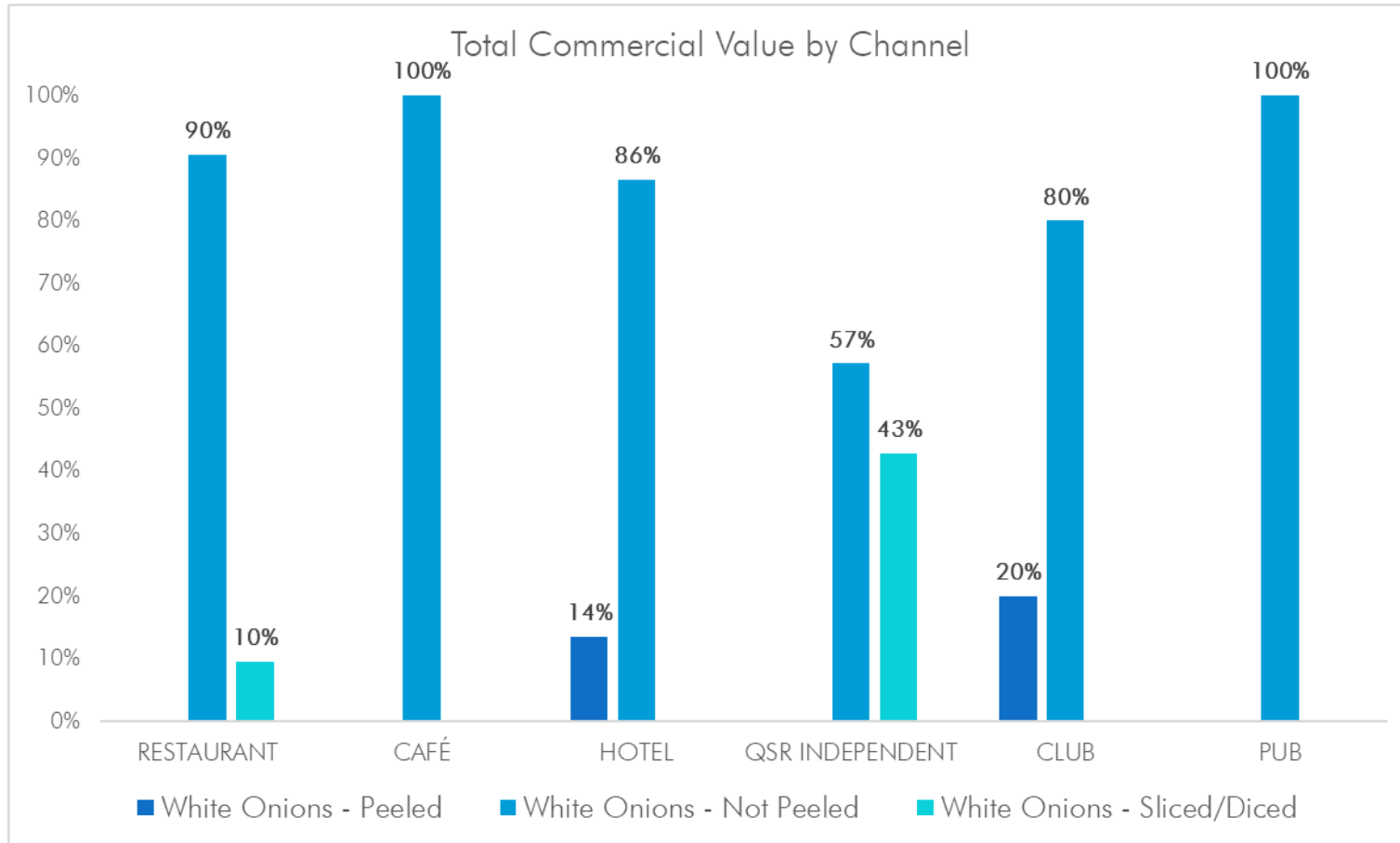
0.4 mill kgs



❖ When it comes to Onions within the Australian Foodservice market, very little White Onions are used in the Commercial sector, mainly not peeled.

# TOTAL COMMERCIAL VALUE BY CHANNEL WHITE ONIONS

1.9 mill AUD

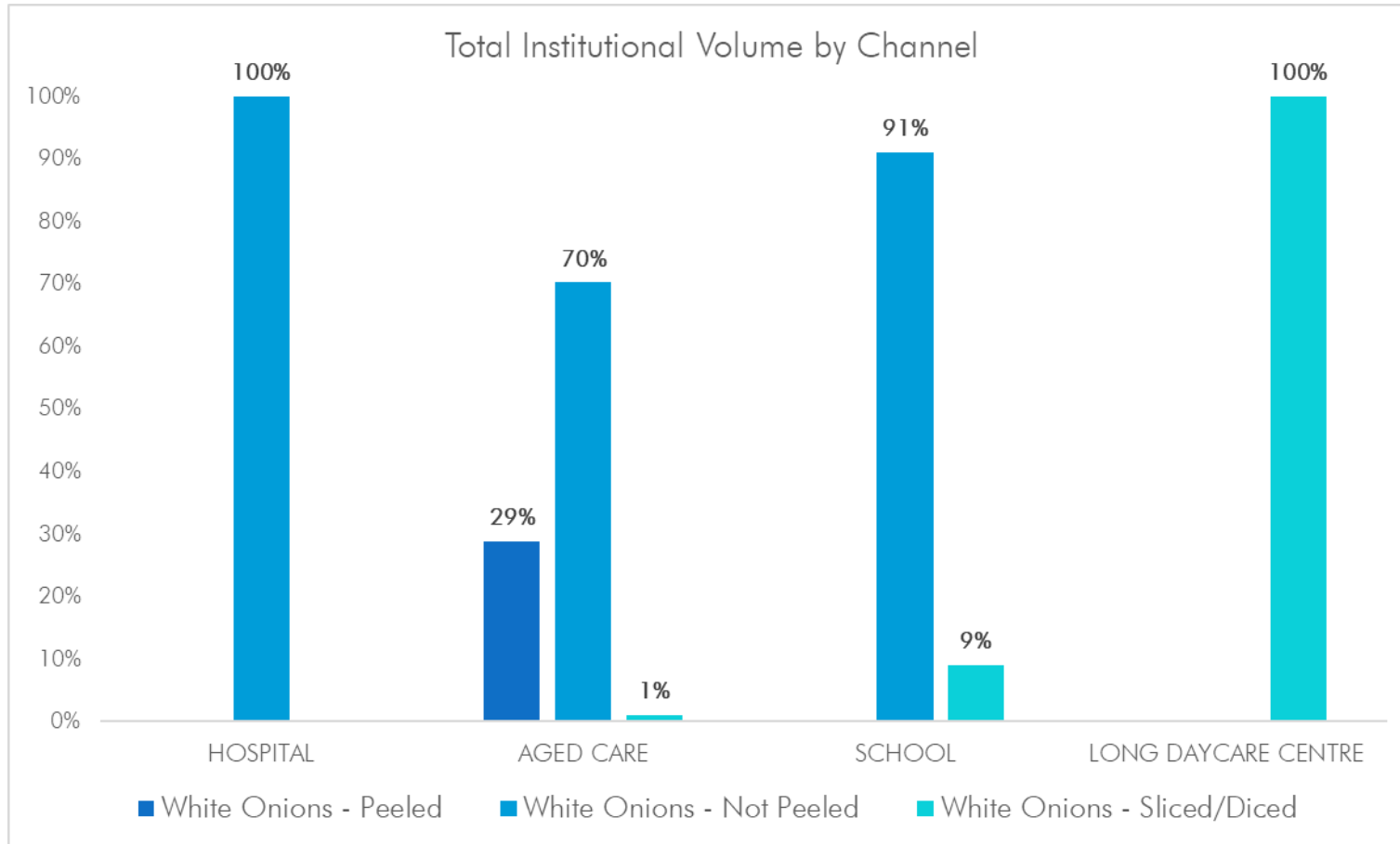


❖ Although the volume share of White Onions in the Commercial sector is only 1%, the value increases to 5% due to the significant increase in pricing per kilo.



# TOTAL INSTITUTIONAL VOLUME BY CHANNEL WHITE ONIONS

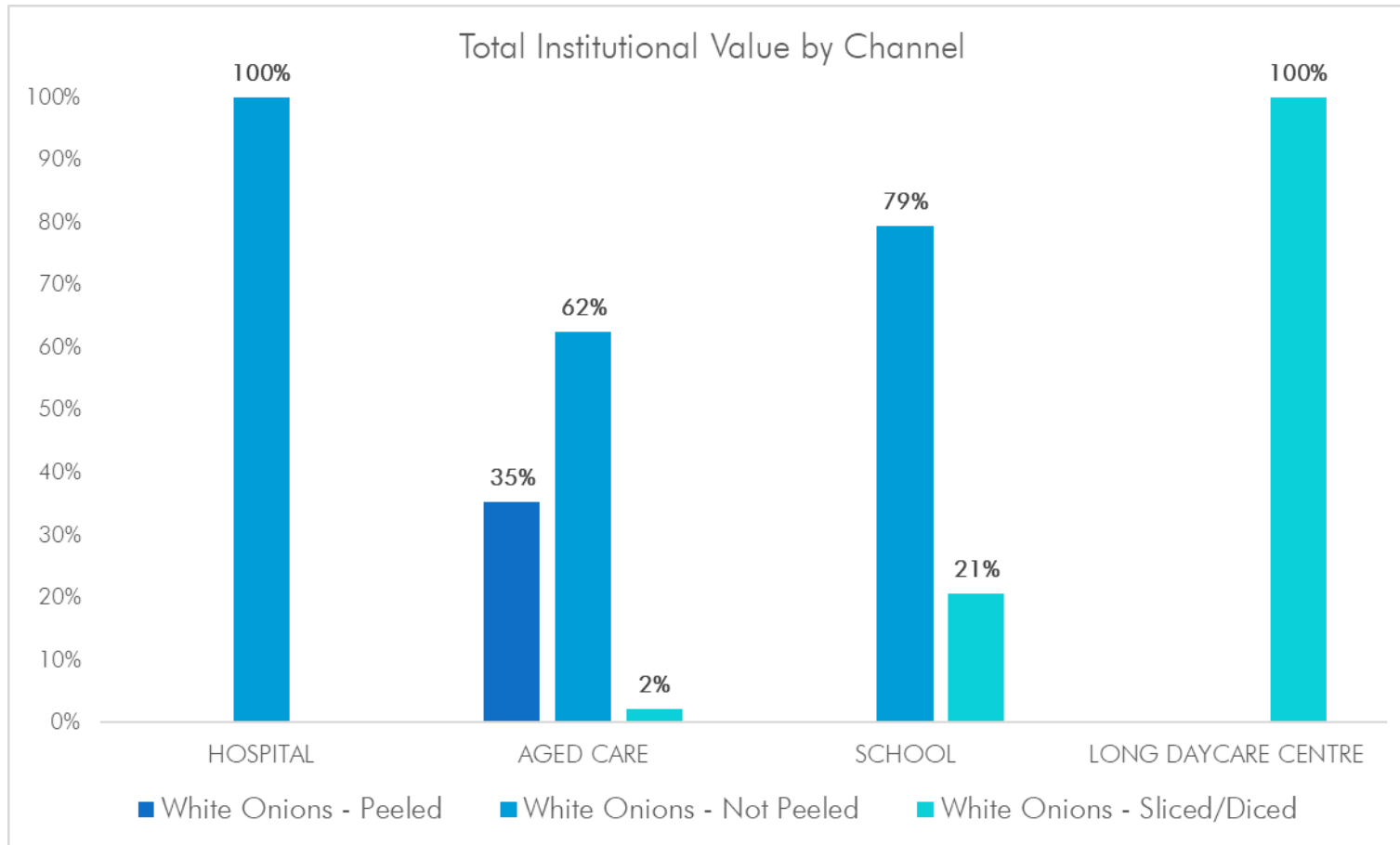
0.1 mill kgs



- ❖ Similarly to the Commercial sector, the institutions use very little White Onions of any type.
- ❖ Interestingly, Long Daycare Centres solely use White Onions – Sliced/Diced.

# TOTAL INSTITUTIONAL VALUE BY CHANNEL WHITE ONIONS

0.6 mill AUD



❖ Albeit, a very low base the only White Onions purchased in Long Daycare Centres are Sliced/Diced.



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