

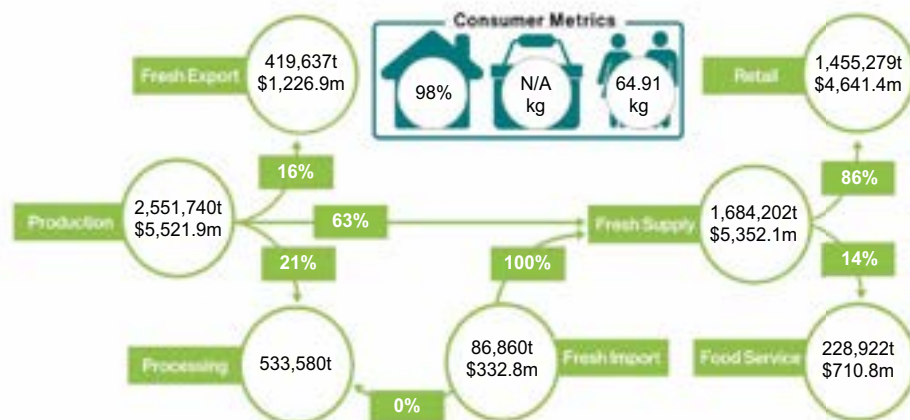


All Fruit - Overview



All Fresh Fruit Overview

ALL FRESH FRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

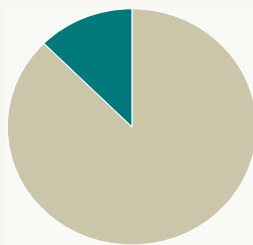
TOTAL PRODUCTION:



\$5,521.9M

2,551,740t produced and valued at \$5,521.9M with 21% sent to be processed.

RETAIL VS FOOD SERVICE:



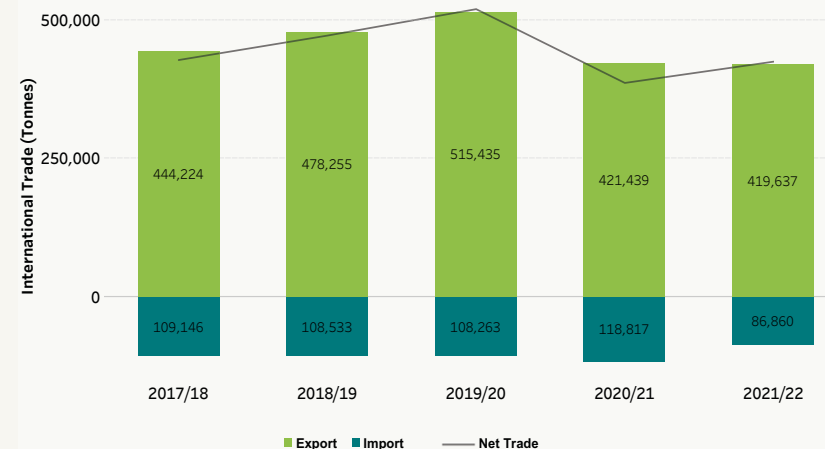
Retail 86% Food Service 14%

The wholesale value of the fresh supply was \$5,352.1M, with \$4,641.4M distributed into retail and \$710.8M into food service.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	2,575,407	2,553,211	>-1%	2,551,740	>-1%
Production (\$m)	\$5,694.2	\$5,759.1	+1%	\$5,521.9	-4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	515,435	421,439	-18%	419,637	>-1%
Fresh Export Value (\$m)	\$1,475.4	\$1,216.4	-18%	\$1,226.9	<1%
Fresh Import Volume (t)	108,263	118,817	+10%	86,860	-27%
Fresh Import Value (\$m)	\$415.9	\$515.2	+24%	\$332.8	-35%
Fresh Supply (t)	1,674,699	1,691,952	+1%	1,684,202	>-1%
Fresh Supply Wholesale Value (\$m)	\$5,425.6	\$5,750.2	+6%	\$5,352.1	-7%
Supply per Capita (kg)	64.91	65.71	+1%	64.91	-1%
Retail Supply (t)	1,479,151	1,469,769	>-1%	1,455,279	>-1%
Retail Supply Wholesale Value (\$m)	\$4,761.0	\$4,958.1	+4%	\$4,641.4	-6%
Food Service Supply (t)	195,549	222,183	+14%	228,922	+3%
Food Service Wholesale Value (\$m)	\$664.7	\$792.1	+19%	\$710.8	-10%

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

ALL FRESH FRUIT INTERNATIONAL TRADE



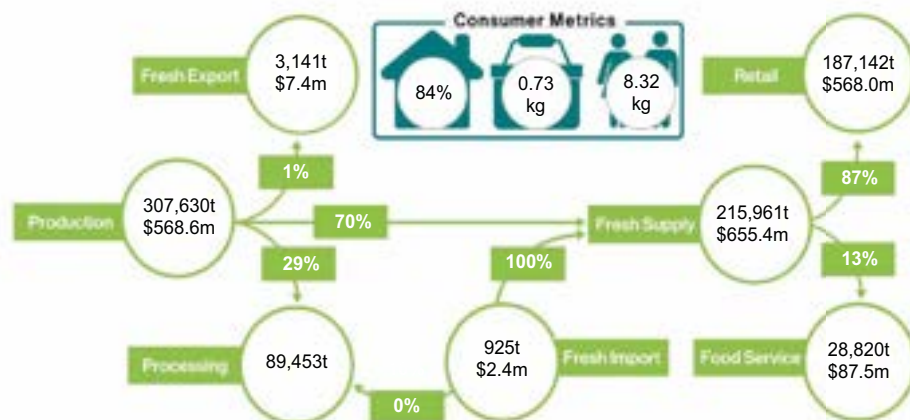
Apples





Fresh Apples Overview

FRESH APPLES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

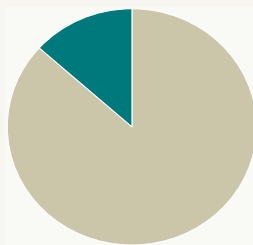
TOTAL PRODUCTION:



\$568.6M

307,630t produced and valued at **\$568.6M** with 29% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 87% ■ Food Service 13%

The wholesale value of the fresh supply was **\$655.4M**, with **\$568M** distributed into retail and **\$87.5M** into food service.

PER CAPITA CONSUMPTION:



84%

84% of Australian households purchased apples, buying an average of **734g** per shopping trip.

PER CAPITA CONSUMPTION:

8.32kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	301,667	280,273	-7%	307,630	+10%
Production (\$m)	\$578.5	\$619.9	+7%	\$568.6	-8%
Producing Trees (000 Trees)	11,421	11,421	-	11,421	-
Fresh Export Volume (t)	2,953	2,147	-27%	3,141	+46%
Fresh Export Value (\$m)	\$7.6	\$5.9	-22%	\$7.4	+25%
Fresh Import Volume (t)	786	1,727	>100%	925	-46%
Fresh Import Value (\$m)	\$1.9	\$4.7	>100%	\$2.4	-49%
Fresh Supply (t)	213,309	199,775	-6%	215,961	+8%
Fresh Supply Wholesale Value (\$m)	\$652.2	\$720.1	+10%	\$655.4	-9%
Supply per Capita (kg)	8.27	7.76	-6%	8.32	+7%
Retail Supply (t)	189,038	175,241	-7%	187,142	+7%
Retail Supply Wholesale Value (\$m)	\$577.9	\$631.6	+9%	\$568.0	-10%
Food Service Supply (t)	24,271	24,534	+1%	28,820	+17%
Food Service Wholesale Value (\$m)	\$74.2	\$88.4	+19%	\$87.5	-1%

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

Fresh Apples Production

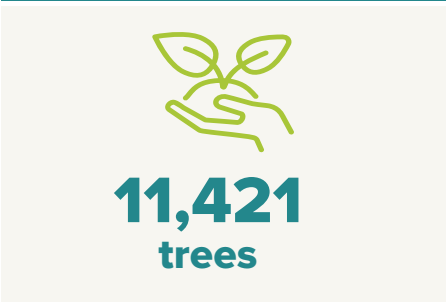
MAJOR PRODUCTION AREAS



Source: APAL

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

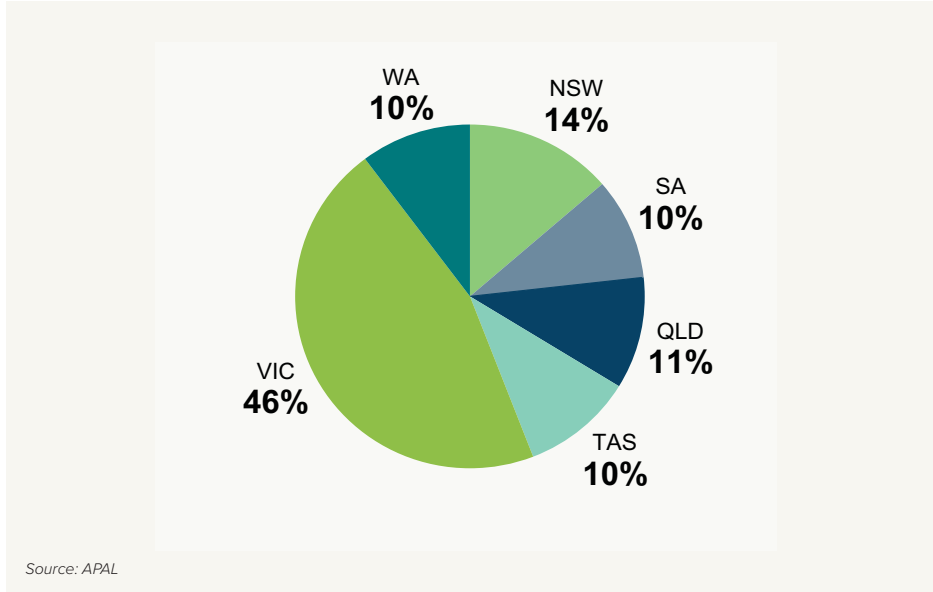
PRODUCTION TREES:



PRODUCTION WINDOW:



2021/22 FRESH APPLES PRODUCTION BY STATE



2021/22 FRESH APPLES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	140,426	\$259.6	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	42,019	\$77.7	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	32,443	\$60.0	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	31,847	\$58.9	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	31,491	\$58.2	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	29,402	\$54.3	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: APAL



MAIN APPLES VARIETIES

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

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

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

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



Pink Lady
41%

Gala
23%

Granny Smith
18%

Sources: APAL

2021/22 FRESH APPLES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	89,508	High	High	Medium	Medium	Medium	Medium	Medium	None	None	High	High	High
Royal Gala	50,212	High	Medium	Medium	Medium	None	None	None	High	High	High	High	High
Granny Smith	39,296	High	High	High	High	High	High	High	High	High	High	High	High
Sundowner	2,183	High	High	High	High	High	High	High	High	High	High	High	High
Other	37,113	High	High	High	High	High	High	High	High	High	High	High	High
Processing	89,508	High	High	High	High	High	High	High	High	High	High	High	High

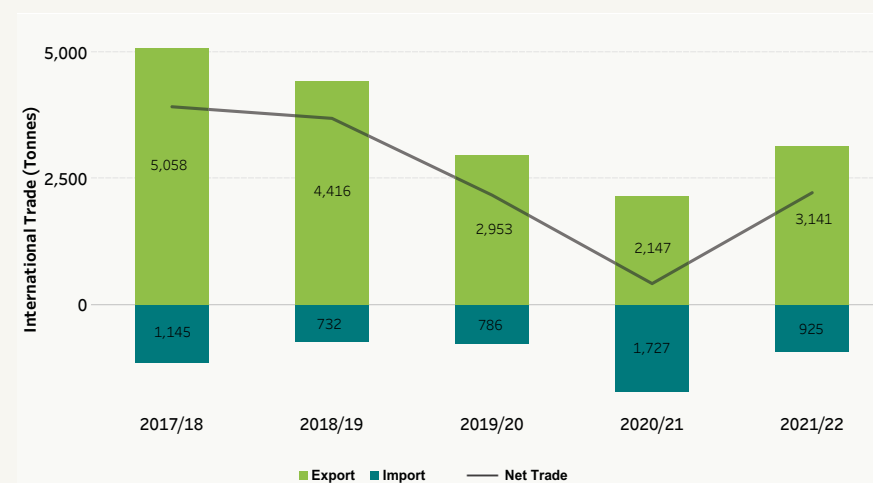
Availability legend: High Medium Low None

Sources: APAL

Fresh Apples International Trade

FRESH APPLES INTERNATIONAL TRADE

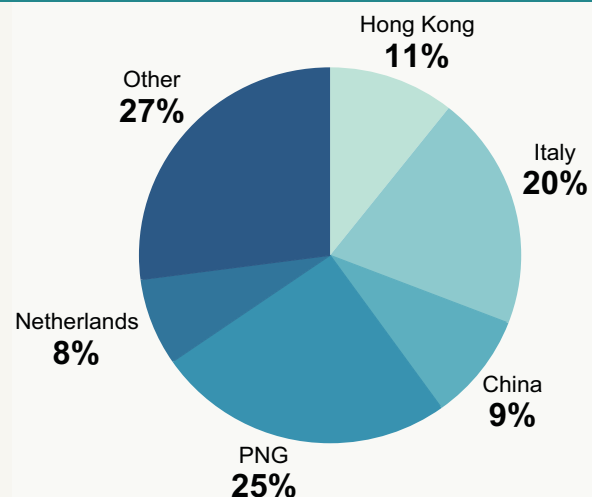
Australia has traditionally been a net exporter of fresh apples, typically exporting between **2,000-5,000 tonnes** per year. For the year ending June 2022, Australia exported **3,141 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH APPLES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **25%** of exported fresh apples were sent to **Papua New Guinea (PNG)**, as profiled in the chart above.

FRESH APPLES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Victoria	492	1,014	563	Victoria	2,158	1,657	1,969
New South Wales	268	588	323	Tasmania	343	92	478
Queensland	-	53	20	Queensland	304	248	441
Western Australia	26	73	19	New South Wales	29	33	191
TOTAL	786	1,727	925	Western Australia	114	86	50
				Other	6	31	12
				TOTAL	2,953	2,147	3,141

FRESH APPLES IMPORTS AND EXPORTS BY COUNTRY

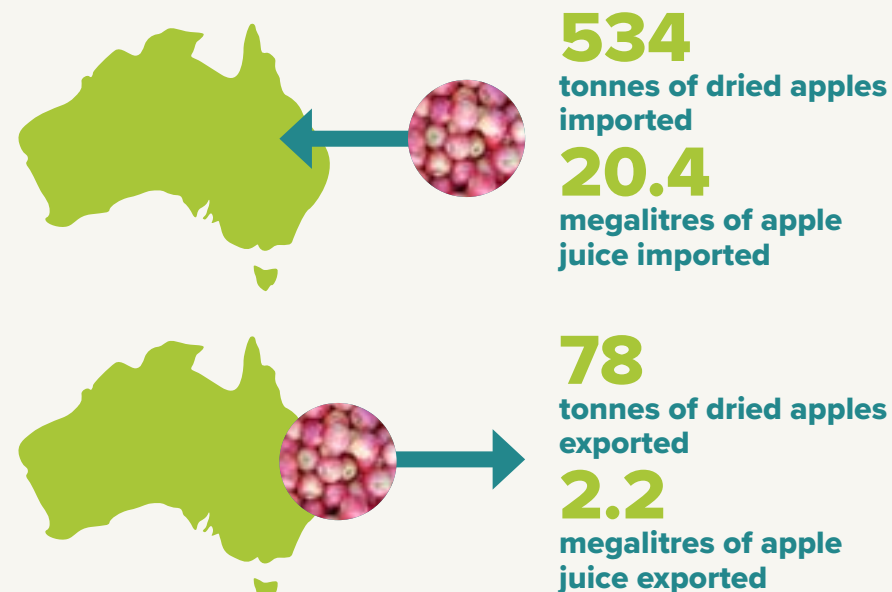
Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
China	786	1,727	925	PNG	701	579	795
Vietnam	< 0.5	-	< 0.5	Italy	213	367	636
Other	< 0.5	-	< 0.5	Hong Kong	459	282	334
TOTAL	786	1,727	925	China	247	30	289
				Netherlands	114	110	236
				Other	1,219	780	850
				TOTAL	2,953	2,147	3,141

Source: GTA

Processed Apples International Trade

2021/22 PROCESSED APPLES INTERNATIONAL TRADE

For the year ending June 2022, an additional **534 tonnes** of dried apples were imported, while **78 tonnes** were exported. Australia also imported **20.4 megalitres** of apple juice, while exporting **2.2 megalitres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 32.



Source: GTA

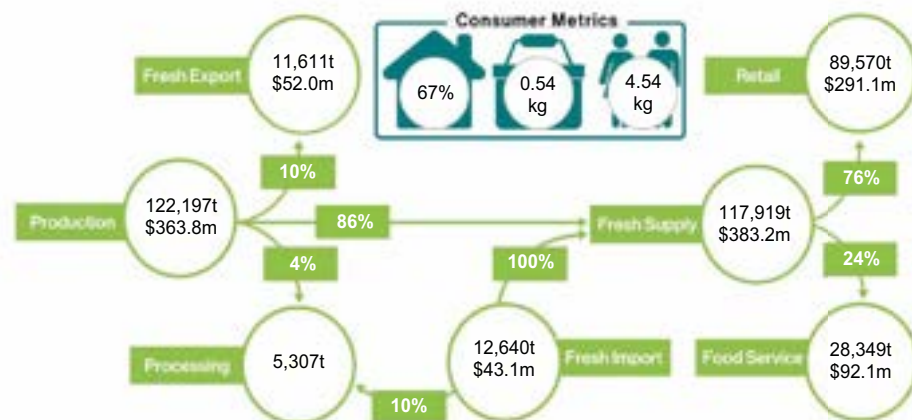
Avocados





Fresh Avocados Overview

FRESH AVOCADOS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

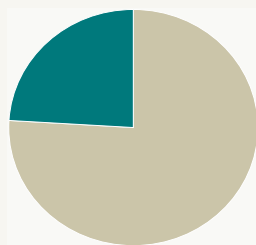
TOTAL PRODUCTION:



\$363.8M

122,197t produced and valued at **\$363.8M** with 4% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 76% ■ Food Service 24%

The wholesale value of the fresh supply was **\$383.2M**, with **\$291.1M** distributed into retail and **\$92.1M** into food service.

CONSUMER METRICS:



67%

67% of Australian households purchased avocados, buying an average of **537g** per shopping trip.

PER CAPITA CONSUMPTION:

4.54kg



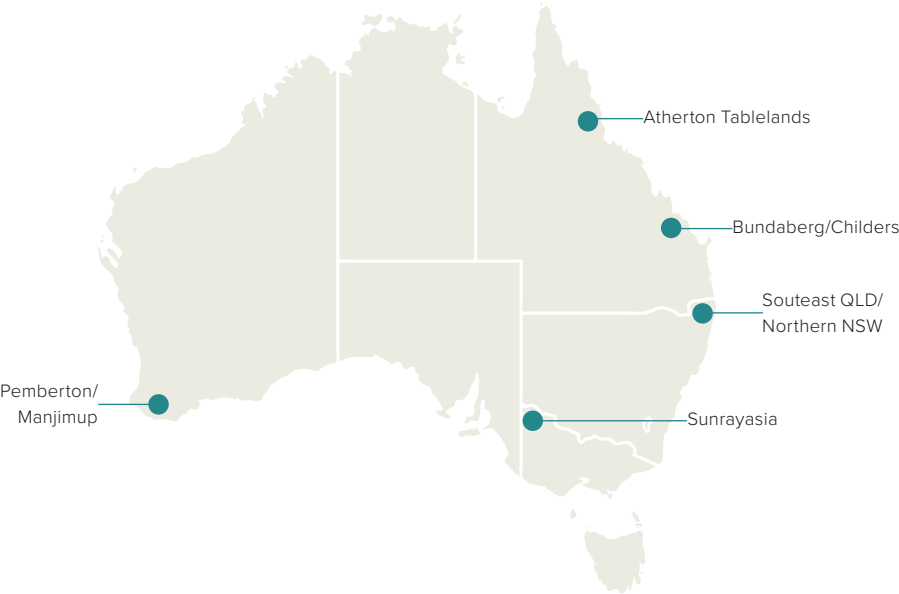
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	87,546	78,085	-11%	122,197	+56%
Production (\$m)	\$432.3	\$488.7	+13%	\$363.8	-26%
Production area (Ha)	18,650	-	-	22,559	-
Fresh Export Volume (t)	4,051	3,155	-22%	11,611	>100%
Fresh Export Value (\$m)	\$25.0	\$22.0	-12%	\$52.0	>100%
Fresh Import Volume (t)	16,121	28,027	+74%	12,640	-55%
Fresh Import Value (\$m)	\$79.8	\$184.7	>100%	\$43.1	-77%
Fresh Supply (t)	94,245	97,848	+4%	117,919	+21%
Fresh Supply Wholesale Value (\$m)	\$540.0	\$717.3	+33%	\$383.2	-47%
Supply per Capita (kg)	3.65	3.80	+4%	4.54	+20%
Retail Supply (t)	74,197	74,693	<1%	89,570	+20%
Retail Supply Wholesale Value (\$m)	\$425.1	\$547.6	+29%	\$291.1	-47%
Food Service Supply (t)	20,048	23,155	+15%	28,349	+22%
Food Service Wholesale Value (\$m)	\$114.9	\$169.8	+48%	\$92.1	-46%

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

Fresh Avocados Production

MAJOR PRODUCTION AREAS



Source: AAL

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

PRODUCTION AREA:



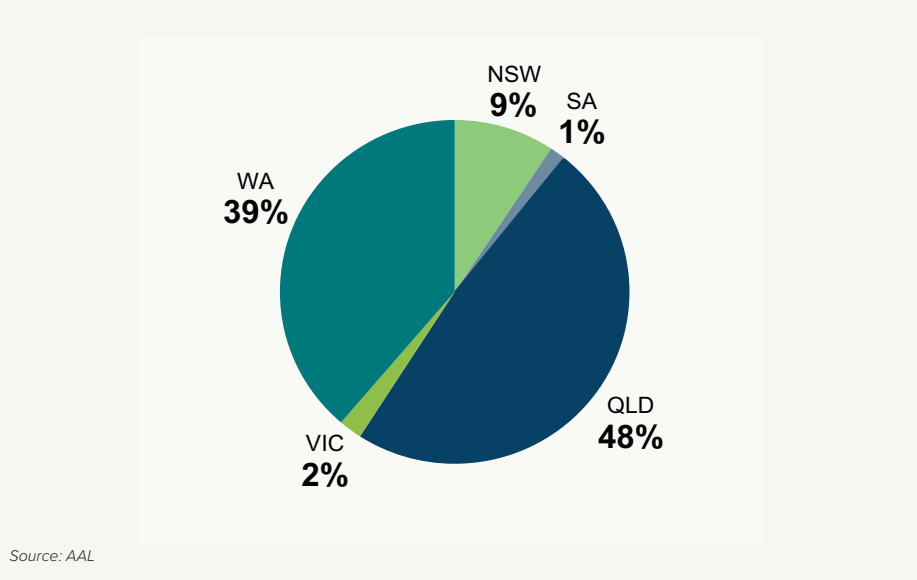
22,559
Ha

PRODUCTION WINDOW:



Year-round

2021/22 FRESH AVOCADOS PRODUCTION BY STATE



2021/22 FRESH AVOCADOS SEASONALITY BY STATE

State	Area (ha)	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	10,852	59,115	\$176.0	High	Medium	Low	None	None	None	None	None	None	High	High	High
Western Australia	4,709	47,316	\$140.9	High	Medium	Low	None	None	None	None	None	None	None	None	None
New South Wales	2,300	11,364	\$33.8	High	Medium	Low	None	None	None	None	None	None	None	None	None
Victoria	993	2,642	\$7.9	High	Medium	Low	None	None	None	None	None	None	None	None	None
South Australia	409	1,761	\$5.2	High	Medium	Low	None	None	None	None	None	None	None	None	None

Availability legend: High Medium Low None

Source: AAL; GTA



MAIN AVOCADOS VARIETIES

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

Hass, an oval shaped avocado with dark-green, pebbly skin which darkens when ripe. Hass avocados accounted for **78%** of fresh production.

Shepard, a light green, pear shaped avocado which does not darken when it ripens. Shepard avocados accounted for **20%** of fresh production.

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



Hass
78%

Shepard
20%

Others
2%

Sources: AAL

2021/22 FRESH AVOCADOS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	94,807	High	High	Medium	Medium	Medium	Medium	Low	Low	None	Low	Low	Low
Shepard	23,887	None	None	None	None	None	None	None	Low	Medium	Medium	None	None
Other	3,289	High	Medium	Medium	Medium	None	None	None	None	Low	Low	Low	Low

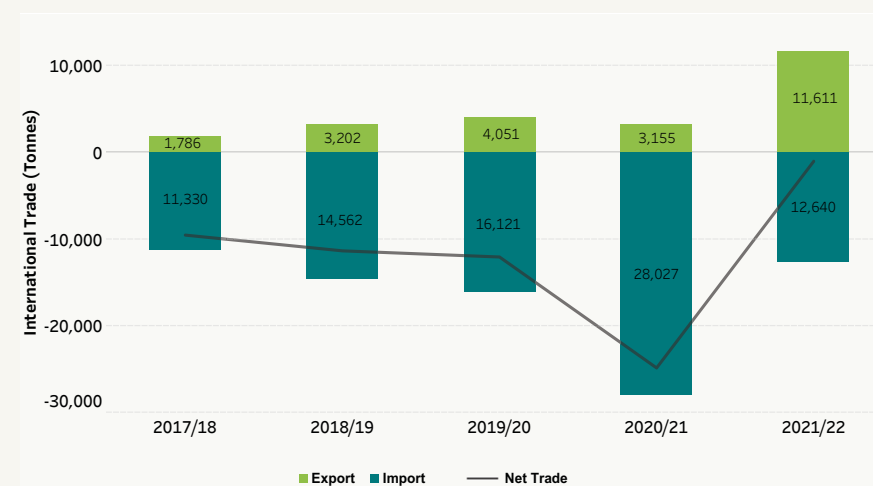
Availability legend: High Medium Low None

Sources: AAL

Fresh Avocados International Trade

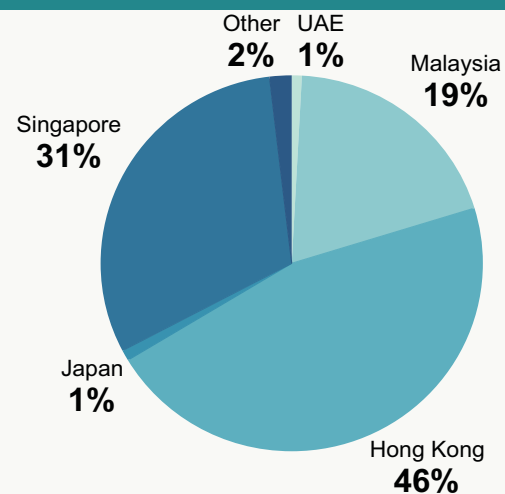
FRESH AVOCADOS INTERNATIONAL TRADE

Australia has traditionally been a net importer of fresh avocados. For the year ending June 2022, Australia imported **12,640 tonnes**, and exported **11,611 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA

2021/22 FRESH AVOCADOS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **46%** of exported fresh avocados were sent to **Hong Kong**, as profiled in the chart above.

FRESH AVOCADOS IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	6,273	14,922	7,180	Queensland	1,559	2,111	5,537
Queensland	8,829	7,315	4,643	Western Australia	1,370	237	2,653
Victoria	1,020	5,755	818	New South Wales	563	581	2,195
Western Australia	-	35	-	Victoria	493	214	926
TOTAL	16,121	28,027	12,640	South Australia	65	6	280
				Other	1	6	20
				TOTAL	4,051	3,155	11,611

FRESH AVOCADOS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New Zealand	16,121	25,509	12,598	Hong Kong	804	1,425	5,358
Chile	-	2,518	42	Singapore	1,526	996	3,580
Other	-	< 0.5	-	Malaysia	1,455	616	2,254
TOTAL	16,121	28,027	12,640	Japan	40	-	106
				UAE	5	2	98
				Other	222	116	215
				TOTAL	4,051	3,155	11,611

Source: GTA

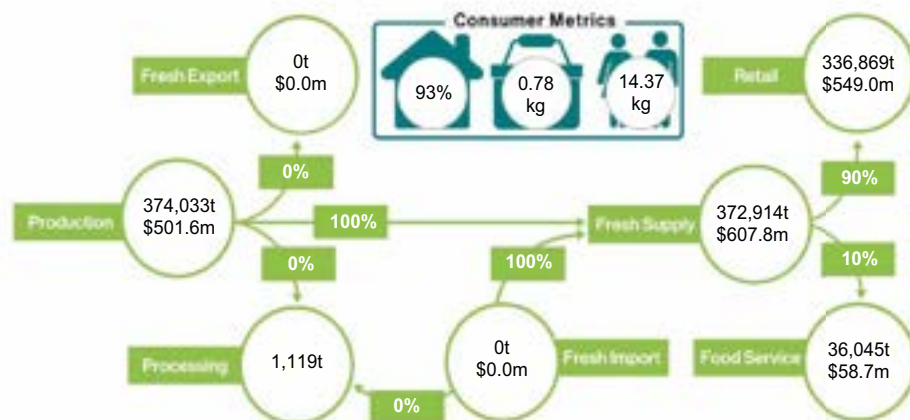
Bananas

A close-up photograph of a bunch of ripe yellow bananas resting in a dark brown woven basket. The bananas are curved and have a few small brown spots on their peels. The basket's texture is visible in the background and foreground.



Fresh Bananas Overview

FRESH BANANAS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

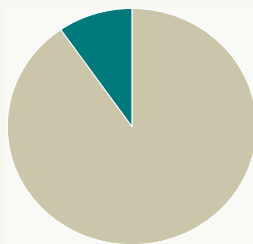
TOTAL PRODUCTION:



\$501.6M

374,033t produced and valued at \$501.6M

RETAIL VS FOOD SERVICE:



■ Retail 90% ■ Food Service 10%

The wholesale value of the fresh supply was **\$607.8M**, with **\$549M** distributed into retail and **\$58.7M** into food service.

CONSUMER METRICS:



93%

93% of Australian households purchased bananas, buying an average of **778g** per shopping trip.

PER CAPITA CONSUMPTION:

14.37kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	381,676	402,982	+6%	374,033	-7%
Production (\$m)	\$596.2	\$596.8	<1%	\$501.6	-16%
Production area (Ha)	12,254	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	380,534	401,777	+6%	372,914	-7%
Fresh Supply Wholesale Value (\$m)	\$722.5	\$723.2	<1%	\$607.8	-16%
Supply per Capita (kg)	14.75	15.60	+6%	14.37	-8%
Retail Supply (t)	350,099	361,961	+3%	336,869	-7%
Retail Supply Wholesale Value (\$m)	\$664.7	\$651.5	-2%	\$549.0	-16%
Food Service Supply (t)	30,435	39,816	+31%	36,045	-9%
Food Service Wholesale Value (\$m)	\$57.8	\$71.7	+24%	\$58.7	-18%

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



Fresh Bananas Production

MAJOR PRODUCTION AREAS



Source: ABGC

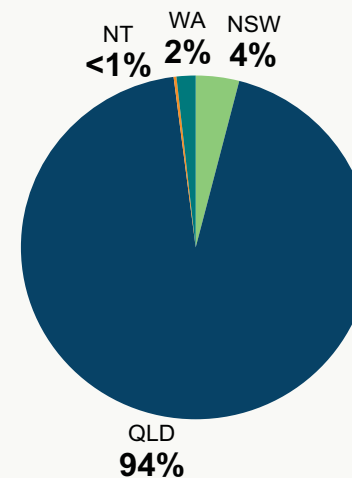
As a tropical fruit, banana production predominantly occurs in the North of Australia, in Queensland, Northern NSW, the Northern Territory and Western Australia. There is minimal international trade of fresh bananas, with some limited trade of dried banana products.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH BANANAS PRODUCTION BY STATE



Source: ABGC

2021/22 FRESH BANANAS SEASONALITY BY STATE

State	Area (ha)	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	12,620	351,591	\$471.5	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	882	14,961	\$20.1	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	321	6,546	\$8.8	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	143	935	\$1.3	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

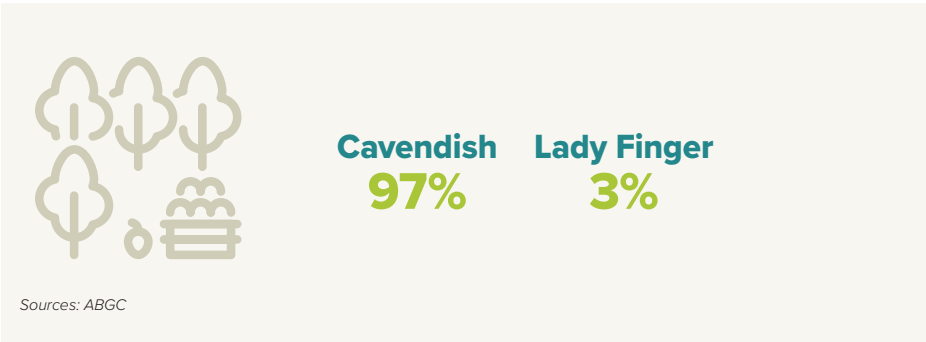
Source: ABGC

MAIN BANANAS VARIETIES

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

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

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



2021/22 FRESH BANANAS SEASONALITY BY VARIETY													
Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	362,812	High	High	High	High	High	Medium	Medium	Medium	High	High	High	High
Lady Fingers	11,221	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Sources: ABGC

Processed Bananas International Trade

2021/22 PROCESSED BANANAS INTERNATIONAL TRADE

Australia has a limited amount of international trade in fresh bananas, with the little trade that does occur being dominated by dried banana products. For the year ending June 2022, **71 tonnes** of dried bananas were imported, while **74 tonnes** was exported.



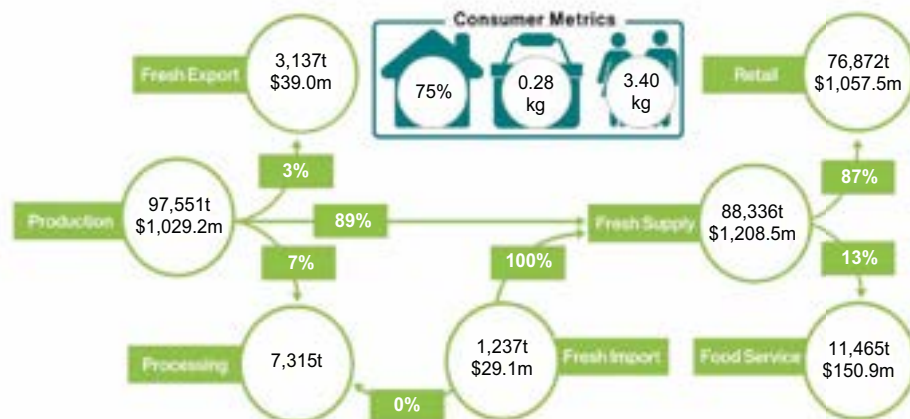


Berries - Overview



Fresh Berries Overview

FRESH BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

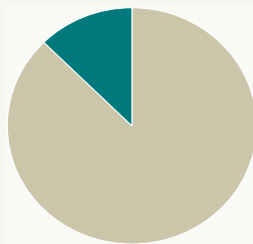
TOTAL PRODUCTION:



\$1,029.2M

97,551t produced and valued at **\$1,029.2M** with 7% sent to be processed.

RETAIL VS FOOD SERVICE:



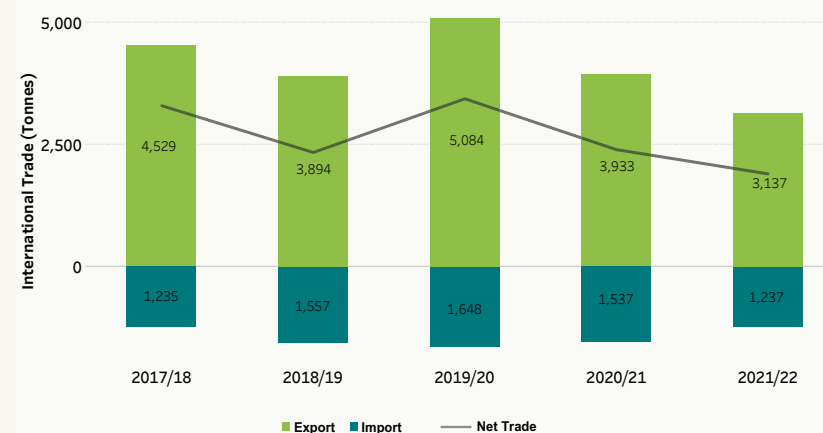
Retail 87% Food Service 13%

The wholesale value of the fresh supply was **\$1,208.5M**, with **\$1,057.5M** distributed into retail and **\$150.9M** into food service.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	113,025	112,326	>-1%	97,551	-13%
Production (\$m)	\$1,040.6	\$1,055.5	+1%	\$1,029.2	-2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5,084	3,933	-23%	3,137	-20%
Fresh Export Value (\$m)	\$42.0	\$34.0	-19%	\$39.0	+15%
Fresh Import Volume (t)	1,648	1,537	-7%	1,237	-20%
Fresh Import Value (\$m)	\$36.0	\$32.3	-10%	\$29.1	-10%
Fresh Supply (t)	97,497	101,540	+4%	88,336	-13%
Fresh Supply Wholesale Value (\$m)	\$1,222.9	\$1,246.2	+2%	\$1,208.5	-3%
Supply per Capita (kg)	3.78	3.94	+4%	3.40	-12%
Retail Supply (t)	85,138	88,728	+4%	76,872	-13%
Retail Supply Wholesale Value (\$m)	\$1,073.9	\$1,096.9	+2%	\$1,057.5	-4%
Food Service Supply (t)	12,359	12,812	+4%	11,465	-11%
Food Service Wholesale Value (\$m)	\$149.0	\$149.3	<1%	\$150.9	+1%

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

FRESH BERRIES INTERNATIONAL TRADE



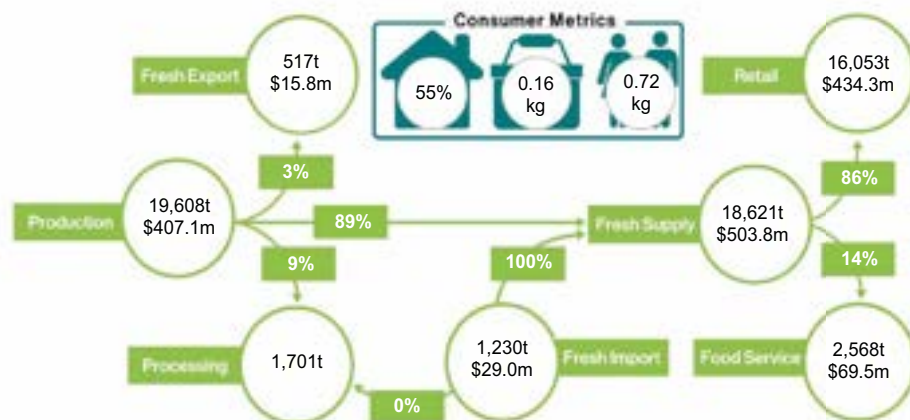


Berries - Blueberries



Fresh Blueberries Overview

FRESH BLUEBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

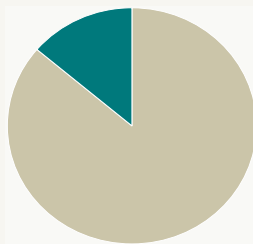
TOTAL PRODUCTION:



\$407.1M

19,608t produced and valued at **\$407.1M** with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was **\$503.8M**, with **\$434.3M** distributed into retail and **\$69.5M** into food service.

CONSUMER METRICS:



55%

55% of Australian households purchased blueberries, buying an average of **160g** per shopping trip.

PER CAPITA CONSUMPTION:

0.72kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	20,783	23,452	+13%	19,608	-16%
Production (\$m)	\$389.6	\$411.2	+6%	\$407.1	-1%
Production area (Ha)	1,375	1,375	-	1,375	-
Fresh Export Volume (t)	393	342	-13%	517	+51%
Fresh Export Value (\$m)	\$8.4	\$8.4	<1%	\$15.8	+88%
Fresh Import Volume (t)	1,644	1,531	-7%	1,230	-20%
Fresh Import Value (\$m)	\$36.0	\$32.2	-10%	\$29.0	-10%
Fresh Supply (t)	20,231	22,606	+12%	18,621	-18%
Fresh Supply Wholesale Value (\$m)	\$497.4	\$517.9	+4%	\$503.8	-3%
Supply per Capita (kg)	0.78	0.88	+12%	0.72	-17%
Retail Supply (t)	17,366	19,572	+13%	16,053	-18%
Retail Supply Wholesale Value (\$m)	\$427.0	\$448.4	+5%	\$434.3	-3%
Food Service Supply (t)	2,865	3,034	+6%	2,568	-15%
Food Service Wholesale Value (\$m)	\$70.4	\$69.5	-1%	\$69.5	>-1%

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



Fresh Blueberries Production

MAJOR PRODUCTION AREAS



Source: BA

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

PRODUCTION AREA:



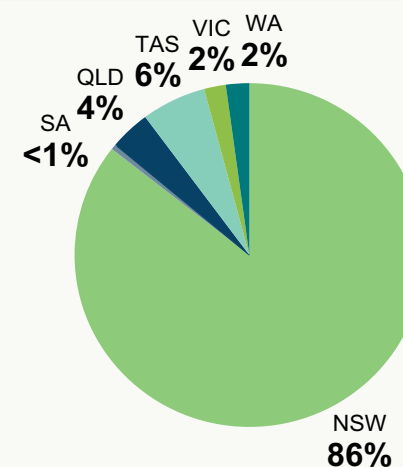
1,375
Ha

PRODUCTION WINDOW:



Year-round

2021/22 FRESH BLUEBERRIES PRODUCTION BY STATE



Source: BA

2021/22 FRESH BLUEBERRIES SEASONALITY BY STATE

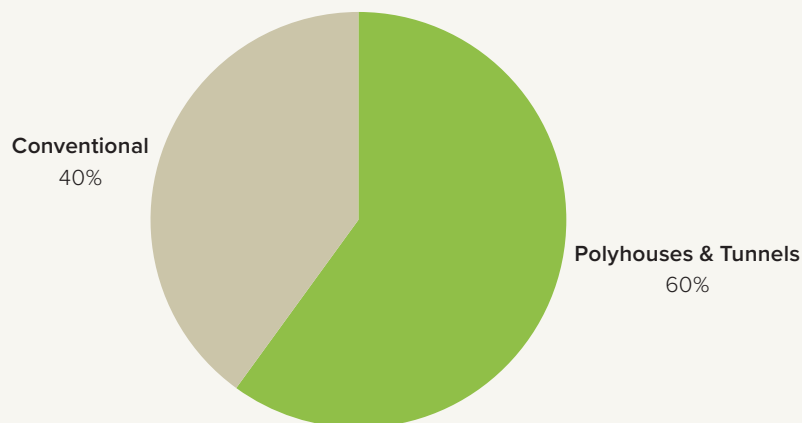
State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	16,785	\$348.4	High	High	High	High	High	High	High	Medium	Medium	None	None	High
Tasmania	1,176	\$24.4	None	None	None	None	None	None	High	High	High	Medium	None	None
Queensland	735	\$15.3	None	None	None	None	None	Medium	Medium	Medium	Medium	None	None	None
Western Australia	422	\$8.8	None	Medium	Medium	High	High	Medium	None	None	None	None	None	None
Victoria	392	\$8.1	None	None	None	None	None	Medium	High	High	High	Medium	None	None
South Australia	98	\$2.0	None	None	None	None	None	Medium	High	High	Medium	Medium	Medium	None

Availability legend: High Medium Low None

Source: BA



2021/22 FRESH BLUEBERRIES PRODUCTION BY SYSTEM



Production of blueberries in Australia occurs in two different types of farming systems. These systems and their contribution to production are **Polyhouses & Tunnels 60%** and **Conventional 40%**.

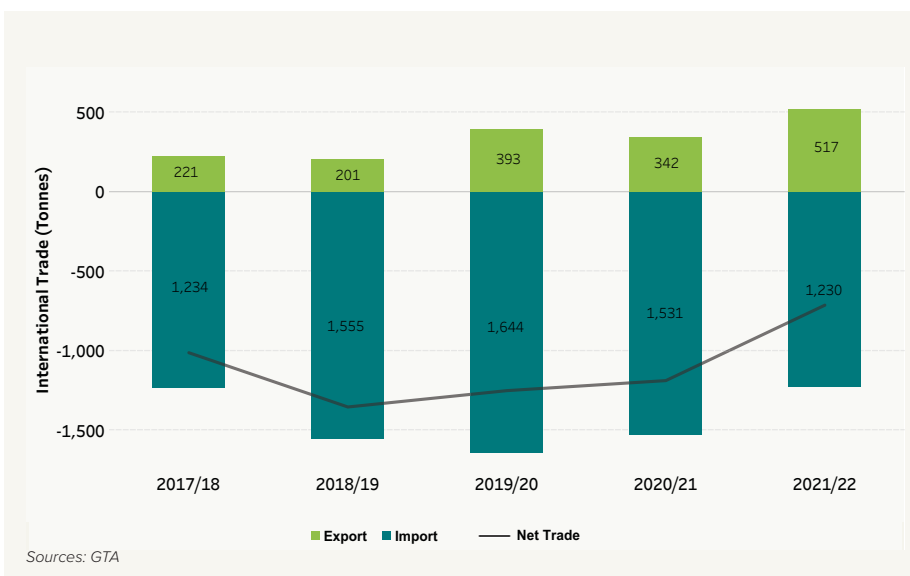
2021/22 FRESH BLUEBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	1259	10,071	\$241.9	-	6,714	\$106.6
Victoria	29	235	\$5.7	-	157	\$2.5
Queensland	55	441	\$10.6	-	294	\$4.7
Western Australia	32	253	\$6.1	-	169	\$2.7
South Australia	7	59	\$1.4	-	39	\$0.6
Tasmania	88	706	\$17.0	-	471	\$7.5
Northern Territory	0	0	\$-	-	0	\$-

Fresh Blueberries International Trade

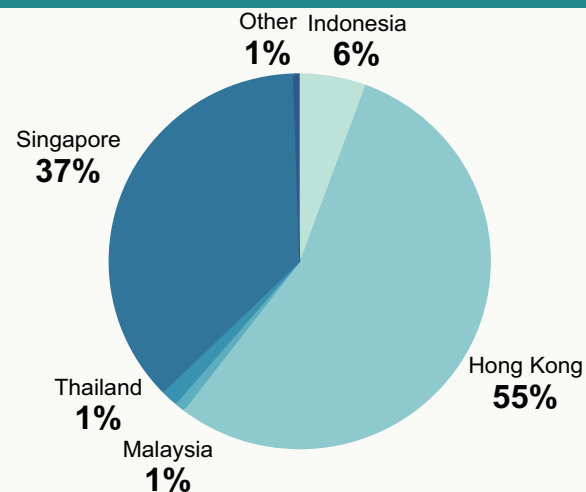
FRESH BLUEBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net importer of fresh blueberries, typically importing **1,000-1,700 tonnes** per year, with the majority of this volume coming from New Zealand. For the year ending June 2022, Australia imported **1,230 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH BLUEBERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **55%** of exported fresh blueberries were sent to **Hong Kong**, as profiled in the chart above.

FRESH BLUEBERRIES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	840	835	587	New South Wales	232	249	418
Western Australia	234	249	252	Queensland	140	66	84
Queensland	384	321	205	Victoria	19	15	12
Victoria	150	126	179	Tasmania	-	5	2
South Australia	36	-	8	South Australia	-	2	1
TOTAL	1,644	1,531	1,230	Other	1	5	< 0.5
				TOTAL	393	342	517

FRESH BLUEBERRIES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New Zealand	1,640	1,507	1,223	Hong Kong	235	172	283
Chile	4	24	5	Singapore	70	107	190
Serbia	-	-	2	Indonesia	25	35	29
TOTAL	1,644	1,531	1,230	Thailand	36	24	7
				Malaysia	13	3	4
				Other	14	2	3
				TOTAL	393	342	517

Source: GTA

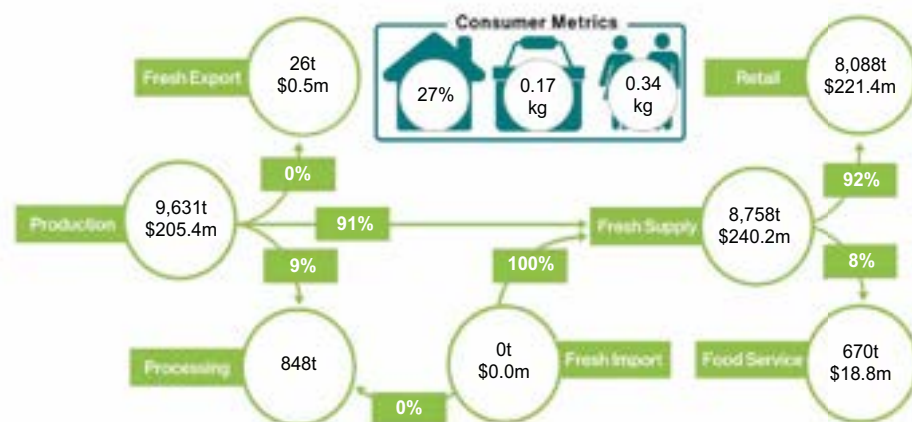


Berries - Rubus



Fresh Rubus Berries Overview

FRESH RUBUS BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

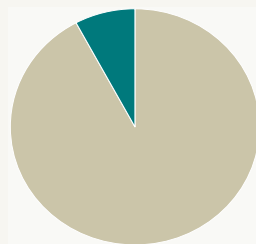
TOTAL PRODUCTION:



\$205.4M

9,631t produced and valued at \$205.4M with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



Retail 92% Food Service 8%

The wholesale value of the fresh supply was \$240.2M, with \$221.4M distributed into retail and \$18.8M into food service.

CONSUMER METRICS:



27%

27% of Australian households purchased rubus berries, buying an average of 172g per shopping trip.

PER CAPITA CONSUMPTION:

0.34kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	9,932	11,123	+12%	9,631	-13%
Production (\$m)	\$216.0	\$227.2	+5%	\$205.4	-10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	13	13	+3%	26	+93%
Fresh Export Value (\$m)	\$0.2	\$0.2	-31%	\$0.5	>100%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	9,100	10,179	+12%	8,758	-14%
Fresh Supply Wholesale Value (\$m)	\$252.9	\$266.2	+5%	\$240.2	-10%
Supply per Capita (kg)	0.35	0.40	+12%	0.34	-13%
Retail Supply (t)	8,498	9,472	+11%	8,088	-15%
Retail Supply Wholesale Value (\$m)	\$236.0	\$247.4	+5%	\$221.4	-10%
Food Service Supply (t)	602	706	+17%	670	-5%
Food Service Wholesale Value (\$m)	\$16.9	\$18.8	+11%	\$18.8	>-1%

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

Fresh Rubus Berries Production

MAJOR PRODUCTION AREAS

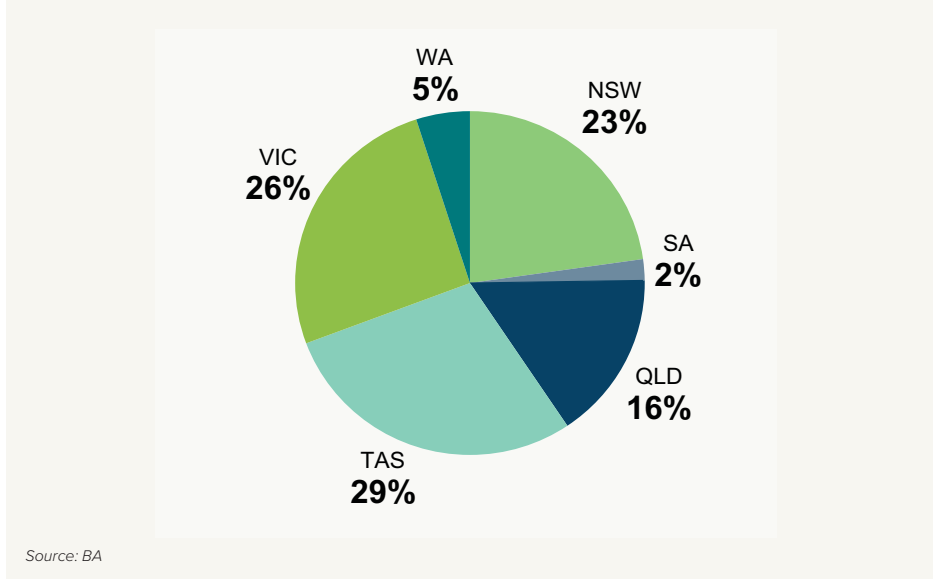


Source: BA

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



2021/22 FRESH RUBUS BERRIES PRODUCTION BY STATE



2021/22 FRESH RUBUS BERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	2,766	\$59.0												
Victoria	2,480	\$52.9												
New South Wales	2,193	\$46.8												
Queensland	1,526	\$32.5												
Western Australia	477	\$10.2												
South Australia	191	\$4.1												

Availability legend: High Medium Low None

Source: BA

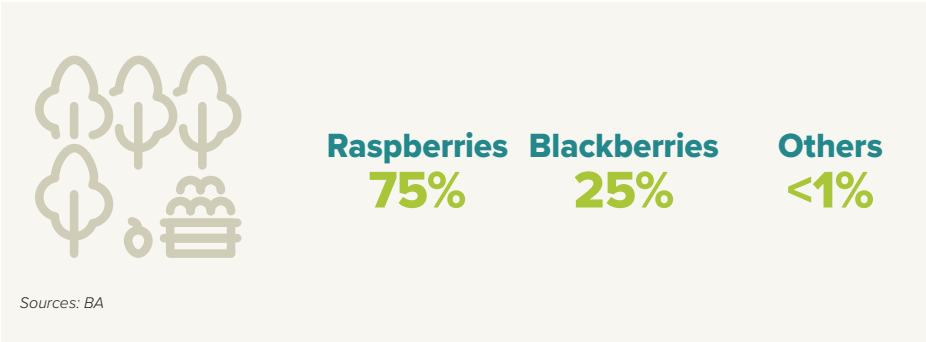
MAIN RUBUS BERRIES TYPES

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

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

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

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

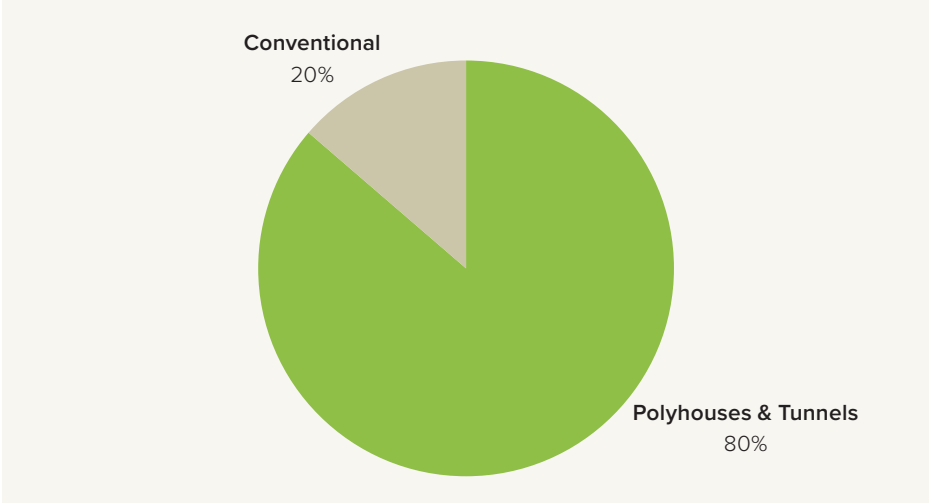


2021/22 FRESH RUBUS BERRIES SEASONALITY BY VARIETY													
Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	6,428	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Blackberries	2,156	None	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Other	39	None	None	None	None	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Source: BA

2021/22 FRESH RUBUS BERRIES PRODUCTION BY SYSTEM



Production of rubus berries in Australia occurs in two different types of farming systems. These systems and their contribution to production are **Polyhouses & Tunnels 80%** and **Conventional 20%**.

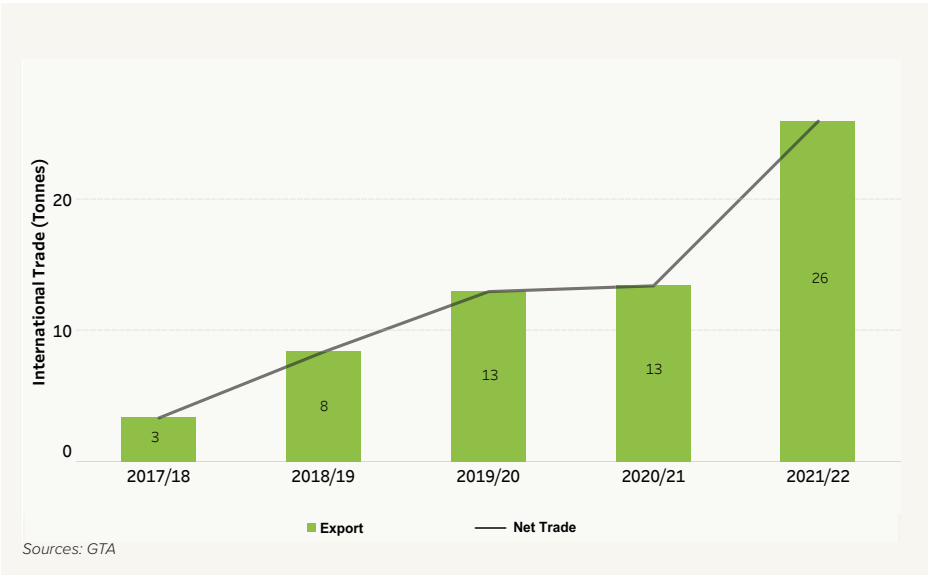
2021/22 FRESH RUBUS BERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	219	1,753	\$40.61	0	440	\$615
Victoria	248	1,982	\$45.91	0	497	\$6.96
Queensland	152	1,220	\$28.25	0	306	\$4.28
Western Australia	48	381	\$8.83	0	96	\$1.34
South Australia	19	152	\$3.53	0	38	\$0.54
Tasmania	276	2,211	\$51.20	0	555	\$776
Northern Territory	0	0	\$-	0	0	\$-

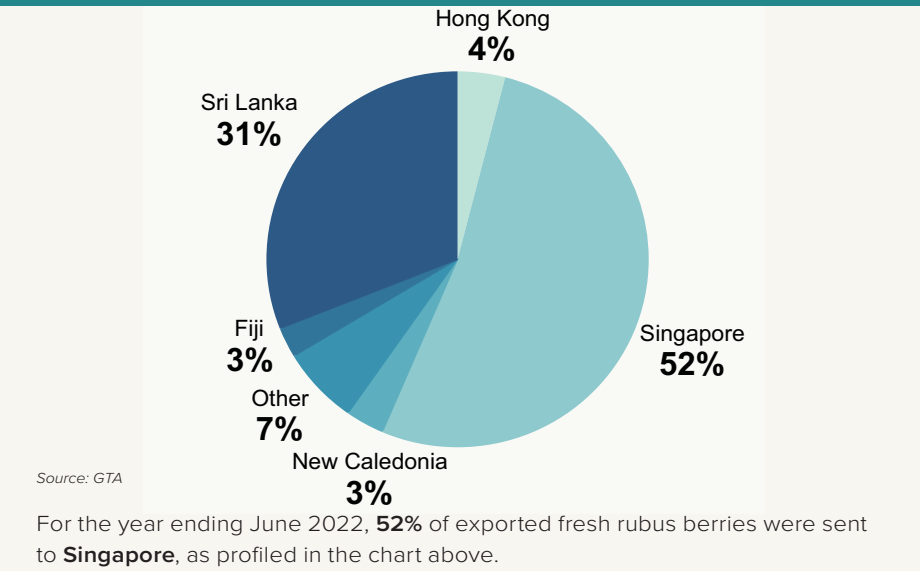
Fresh Rubus Berries International Trade

FRESH RUBUS BERRIES INTERNATIONAL TRADE

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



2021/22 FRESH RUBUS BERRIES EXPORTS BY COUNTRY



FRESH RUBUS BERRIES EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Victoria	3	10	11
New South Wales	10	2	10
Queensland	< 0.5	1	3
Tasmania	< 0.5	< 0.5	1
Northern Territory	-	< 0.5	-
Other	< 0.5	< 0.5	1
TOTAL	13	13	26

FRESH RUBUS BERRIES EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Singapore	9	2	14
Sri Lanka	-	8	8
Hong Kong	1	1	1
New Caledonia	< 0.5	< 0.5	1
Fiji	< 0.5	< 0.5	1
Other	3	2	2
TOTAL	13	13	26

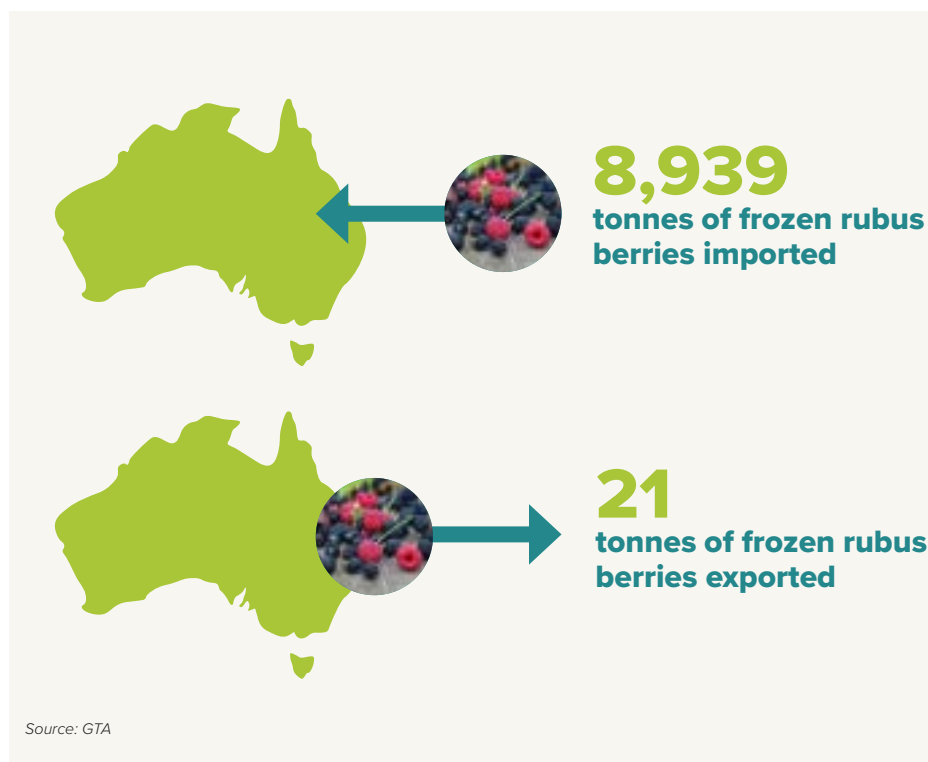
Source: GTA



Processed Rubus Berries International Trade

2021/22 PROCESSED RUBUS BERRIES INTERNATIONAL TRADE

For the year ending June 2022, an additional **8,939 tonnes** of frozen rubus berries were imported, while **21 tonnes** were exported.



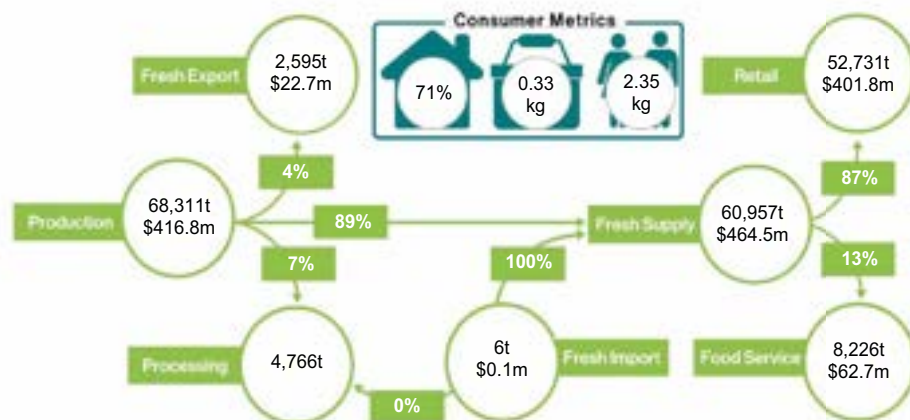


Berries - Strawberries



Fresh Strawberries Overview

FRESH STRAWBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

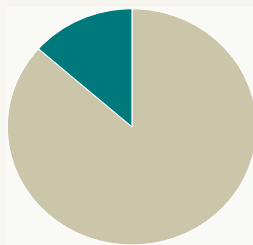
TOTAL PRODUCTION:



\$416.8M

68,311t produced and valued at **\$416.8M** with 7% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 87% ■ Food Service 13%

The wholesale value of the fresh supply was **\$464.5M**, with **\$401.8M** distributed into retail and **\$62.7M** into food service.

CONSUMER METRICS:



71%

71% of Australian households purchased strawberries, buying an average of **335g** per shopping trip.

PER CAPITA CONSUMPTION:

2.35kg



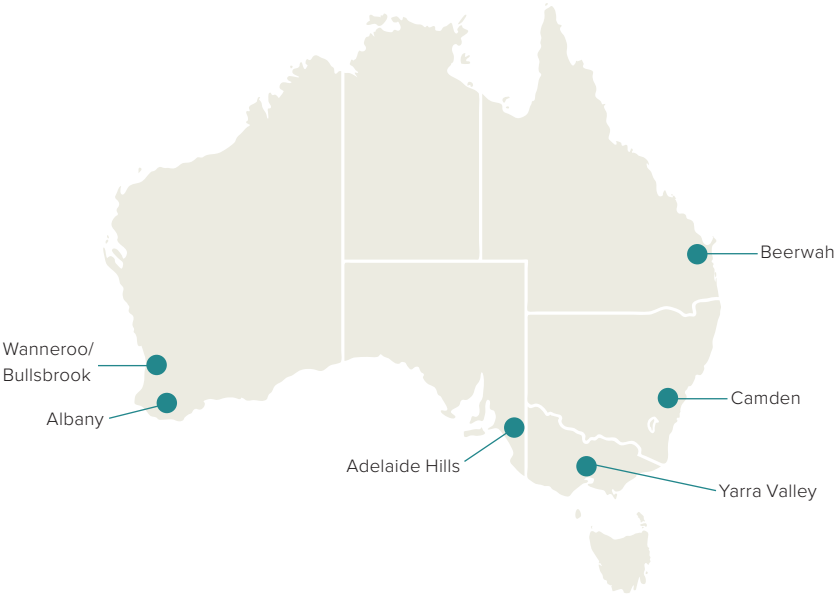
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	82,310	77,751	-6%	68,311	-12%
Production (\$m)	\$435.0	\$417.2	-4%	\$416.8	>-1%
Production area (Ha)	2,337	2,090	-11%	2,279	+9%
Fresh Export Volume (t)	4,678	3,578	-24%	2,595	-27%
Fresh Export Value (\$m)	\$33.4	\$25.5	-24%	\$22.7	-11%
Fresh Import Volume (t)	4	7	+83%	6	-8%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	+74%	< \$0.1	>100%
Fresh Supply (t)	68,166	68,755	<1%	60,957	-11%
Fresh Supply Wholesale Value (\$m)	\$472.6	\$462.1	-2%	\$464.5	<1%
Supply per Capita (kg)	2.64	2.67	+1%	2.35	-10%
Retail Supply (t)	59,275	59,683	<1%	52,731	-12%
Retail Supply Wholesale Value (\$m)	\$410.9	\$401.2	-2%	\$401.8	<1%
Food Service Supply (t)	8,891	9,072	+2%	8,226	-9%
Food Service Wholesale Value (\$m)	\$61.6	\$61.0	-1%	\$62.7	+3%

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

Fresh Strawberries Production

MAJOR PRODUCTION AREAS



Source: SAI

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

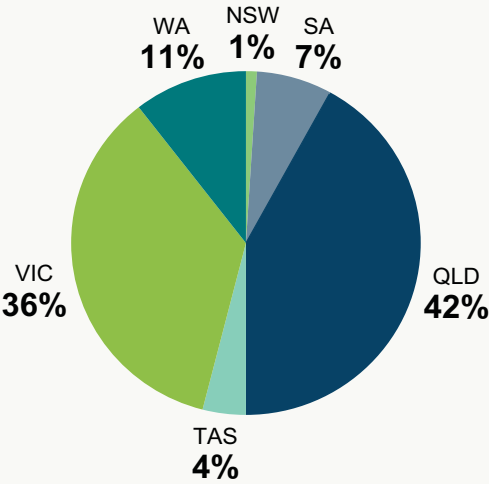
PRODUCTION AREA:



PRODUCTION WINDOW:



2021/22 FRESH STRAWBERRIES PRODUCTION BY STATE



Source: SAI

2021/22 FRESH STRAWBERRIES SEASONALITY BY STATE

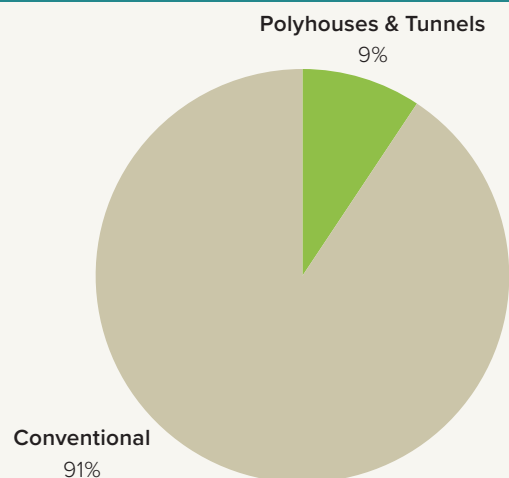
State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	28,691	\$175.2	High	High	High	Medium	Medium	None	None	None	Low	Low	Low	Low
Victoria	24,251	\$148.0	None	None	None	Medium	High	High	High	High	High	Medium	Medium	Medium
Western Australia	7,173	\$43.8	High	High	High	Medium	Medium	Low	None	None	None	None	None	None
South Australia	4,782	\$29.2	None	Low	Low	Medium	High	High	High	High	High	Medium	Medium	Medium
Tasmania	2,732	\$16.7	None	None	None	Medium	Medium	High	High	High	High	High	None	None
New South Wales	683	\$4.2	None	None	None	Medium	Medium	High	High	High	High	High	None	None

Availability legend: High Medium Low None

Source: SAI



2021/22 FRESH STRAWBERRIES PRODUCTION BY SYSTEM



Production of strawberries in Australia occurs in two different types of farming systems. These systems and their contribution to production are **Polyhouses & Tunnels 9%** and **Conventional 91%**.

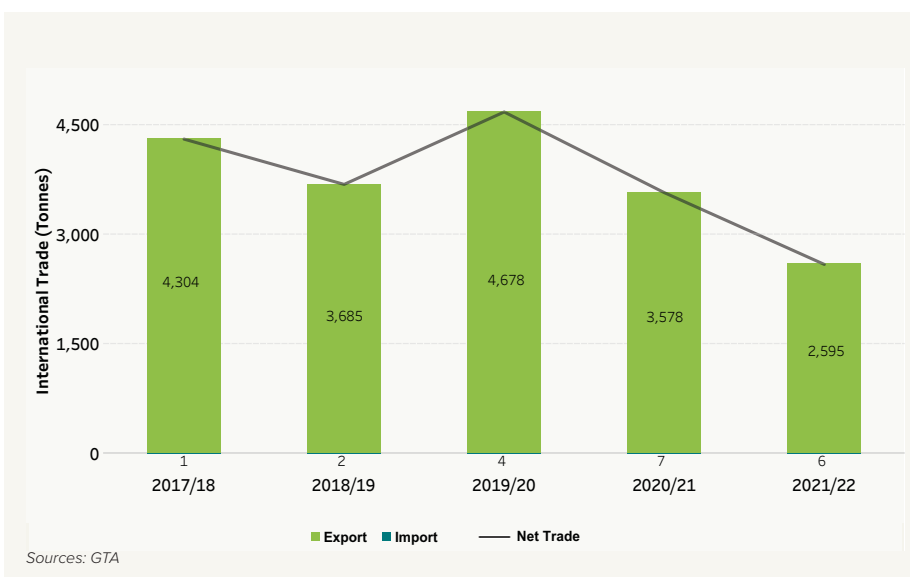
2021/22 FRESH STRAWBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	4	64	\$0.4	-	619	\$3.7
Victoria	151	2,265	\$15.7	-	21,985	\$132.4
Queensland	179	2,680	\$18.5	-	26,011	\$156.6
Western Australia	45	670	\$4.6	-	6,503	\$39.2
South Australia	30	447	\$3.1	-	4,335	\$26.1
Tasmania	17	255	\$1.8	-	2,477	\$14.9
Northern Territory	0	0	\$-	-	0	\$-

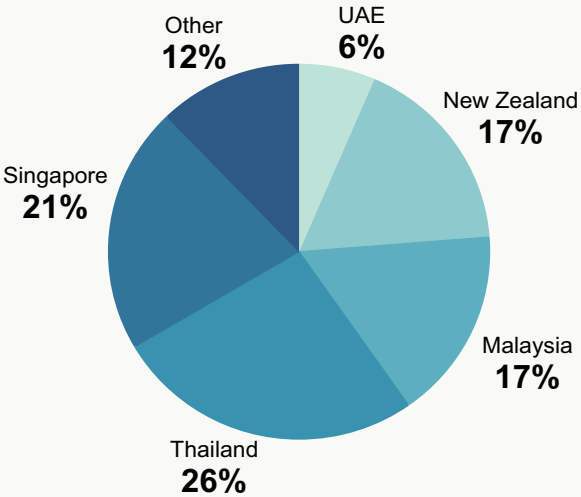
Fresh Strawberries International Trade

FRESH STRAWBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh strawberries. For the year ending June 2022, Australia exported **2,595 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH STRAWBERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **26%** of exported fresh strawberries were sent to **Thailand**, as profiled in the chart above.

FRESH STRAWBERRIES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Victoria	-	< 0.5	5	Western Australia	3,576	2,548	1,890
Queensland	-	-	1	Queensland	616	689	597
New South Wales	-	< 0.5	1	New South Wales	419	279	70
South Australia	3	6	-	Victoria	66	59	29
Western Australia	< 0.5	-	-	Northern Territory	-	< 0.5	8
Other	< 0.5	< 0.5	-	Other	< 0.5	2	-
TOTAL	4	7	6	TOTAL	4,678	3,578	2,595

FRESH STRAWBERRIES IMPORTS AND EXPORTS BY COUNTRY

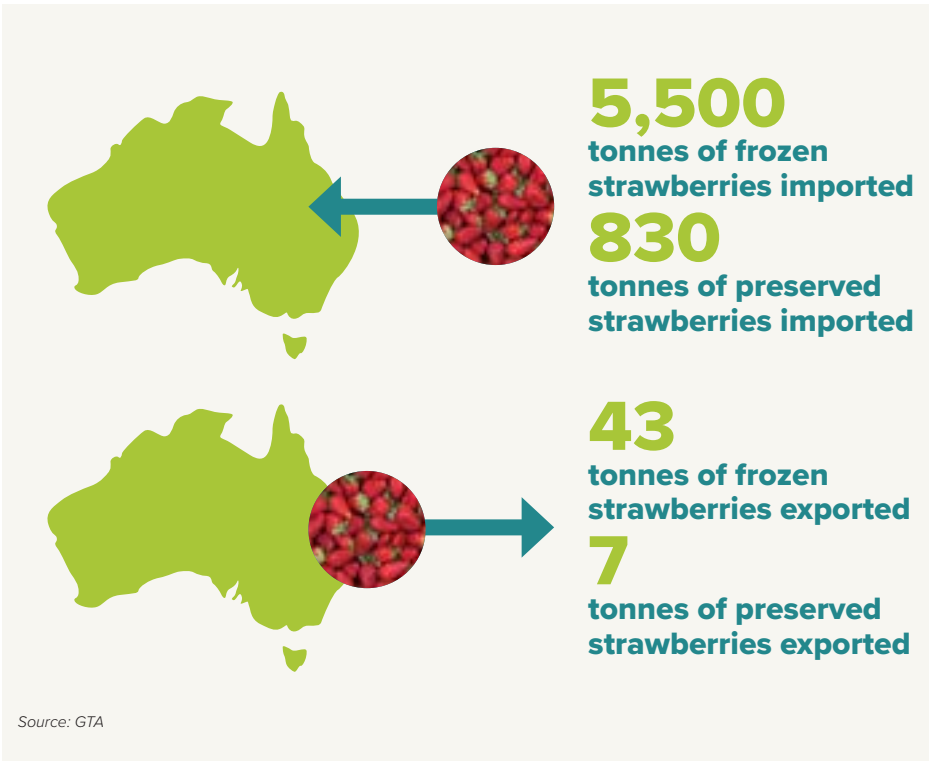
Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Spain	-	3	5	Thailand	951	891	682
Sth. Korea	-	< 0.5	1	Singapore	1,006	783	552
Japan	-	< 0.5	< 0.5	New Zealand	675	584	449
Chile	-	3	-	Malaysia	461	519	429
Germany	2	-	-	UAE	709	281	167
Other	2	< 0.5	< 0.5	Other	878	519	316
TOTAL	4	7	6	TOTAL	4,678	3,578	2,595

Source: GTA

Processed Strawberries International Trade

2021/22 PROCESSED STRAWBERRIES INTERNATIONAL TRADE

For the year ending June 2022, an additional **5,500 tonnes** of frozen strawberries were imported, while **43 tonnes** were exported. Australia also imported **830 tonnes** of preserved strawberries, while exporting **7 tonnes** of preserved strawberries.



Source: GTA

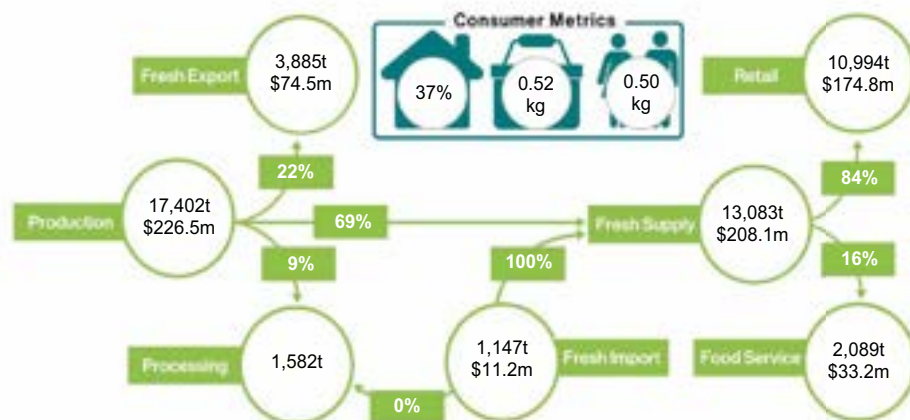
Cherries





Fresh Cherries Overview

FRESH CHERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

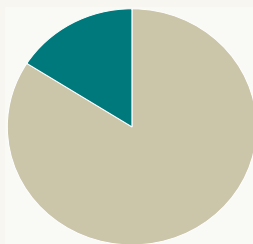
TOTAL PRODUCTION:



\$226.5M

17,402t produced and valued at **\$226.5M** with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 84% ■ Food Service 16%

The wholesale value of the fresh supply was **\$208.1M**, with **\$174.8M** distributed into retail and **\$33.2M** into food service.

CONSUMER METRICS:



37%

37% of Australian households purchased cherries, buying an average of **522g** per shopping trip.

PER CAPITA CONSUMPTION:

0.50kg



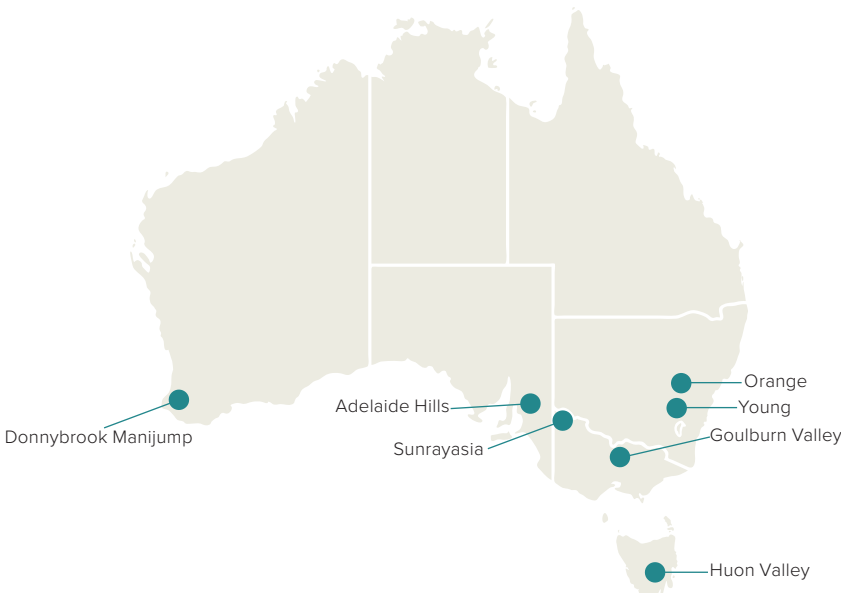
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	14,720	20,074	+36%	17,402	-13%
Production (\$m)	\$184.0	\$231.3	+26%	\$226.5	-2%
Production area (Ha)	2,184	-	-	-	-
Fresh Export Volume (t)	4,460	4,715	+6%	3,885	-18%
Fresh Export Value (\$m)	\$81.7	\$82.4	<1%	\$74.5	-10%
Fresh Import Volume (t)	1,954	1,345	-31%	1,147	-15%
Fresh Import Value (\$m)	\$17.1	\$14.1	-17%	\$11.2	-21%
Fresh Supply (t)	11,124	14,537	+31%	13,083	-10%
Fresh Supply Wholesale Value (\$m)	\$161.7	\$206.0	+27%	\$208.1	<1%
Supply per Capita (kg)	0.43	0.56	+31%	0.50	-11%
Retail Supply (t)	9,673	11,916	+23%	10,994	-8%
Retail Supply Wholesale Value (\$m)	\$140.6	\$168.9	+20%	\$174.8	+4%
Food Service Supply (t)	1,451	2,622	+81%	2,089	-20%
Food Service Wholesale Value (\$m)	\$21.1	\$37.2	+76%	\$33.2	-11%

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

Fresh Cherries Production

MAJOR PRODUCTION AREAS

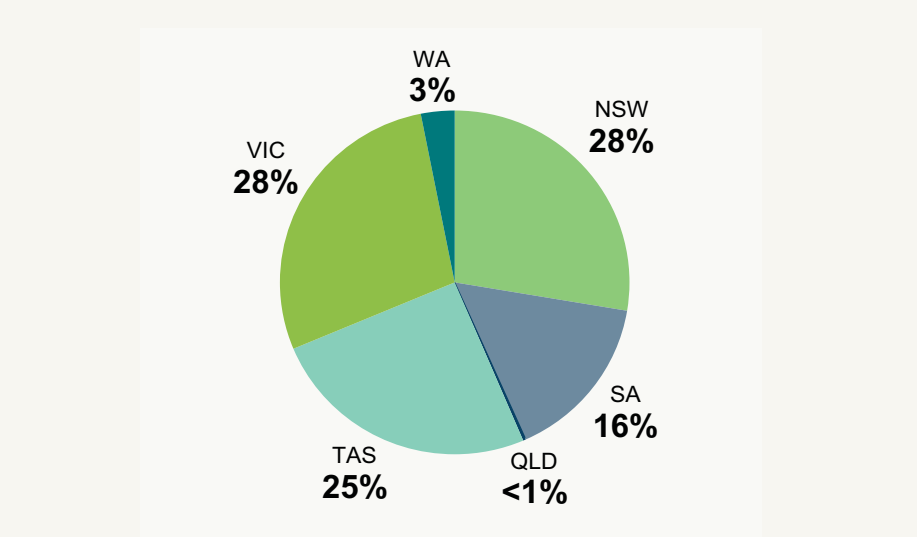


Source: CGAI

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



2021/22 FRESH CHERRIES PRODUCTION BY STATE



Source: CGAI

2021/22 FRESH CHERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	4,908	\$63.9					High	High	High	Medium				
New South Wales	4,812	\$62.6				Medium	High	High	Medium					
Tasmania	4,368	\$56.9						Medium	High	Medium				
South Australia	2,732	\$35.6				Medium	High	High	Medium					
Western Australia	539	\$7.0					Medium	Medium	High	Medium				
Queensland	44	\$0.6				Medium	Medium	High	High	Medium				

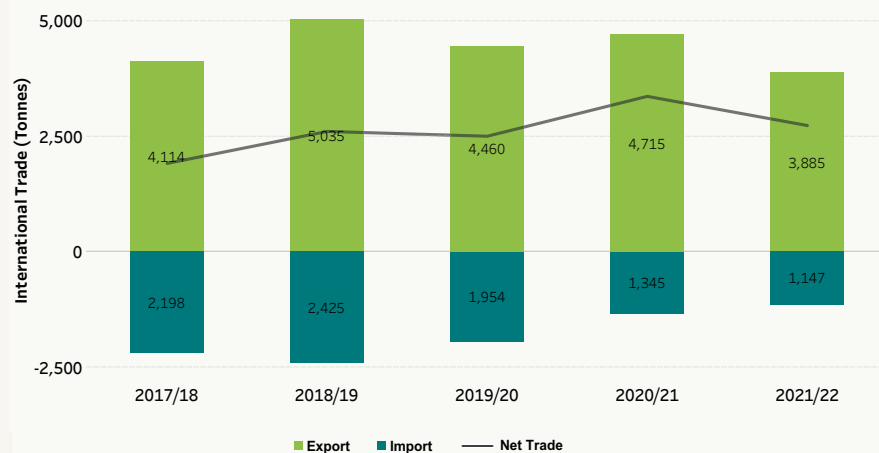
Availability legend: High Medium Low None

Source: CGAI

Fresh Cherries International Trade

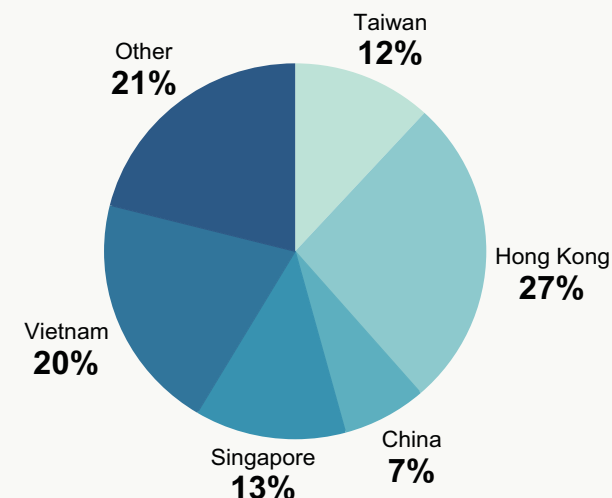
FRESH CHERRIES INTERNATIONAL TRADE

Australia is now a net exporter of fresh cherries, after recent increases to export volumes, with the majority of this volume exported to Vietnam and Hong Kong. For the year ending June 2022, Australia imported **1,147 tonnes** of fresh cherries, primarily from the United States, and exported **3,885 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA

2021/22 FRESH CHERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **27%** of exported fresh cherries were sent to **Hong Kong**, as profiled in the chart above.

FRESH CHERRIES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	1,180	987	743	Tasmania	1,731	2,415	2,265
Victoria	394	185	225	Victoria	1,682	1,513	1,054
Western Australia	192	116	98	New South Wales	950	612	313
Queensland	188	57	80	South Australia	77	163	198
Other	-	-	< 0.5	Queensland	18	11	55
TOTAL	1,954	1,345	1,147	Other	2	1	< 0.5
				TOTAL	4,460	4,715	3,885

FRESH CHERRIES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	1,951	1,345	1,147	Hong Kong	615	1,167	1,040
New Zealand	3	-	-	Vietnam	570	760	792
TOTAL	1,954	1,345	1,147	Singapore	469	537	498
				Taiwan	270	404	459
				China	1,496	864	278
				Other	1,041	984	818
				TOTAL	4,460	4,715	3,885

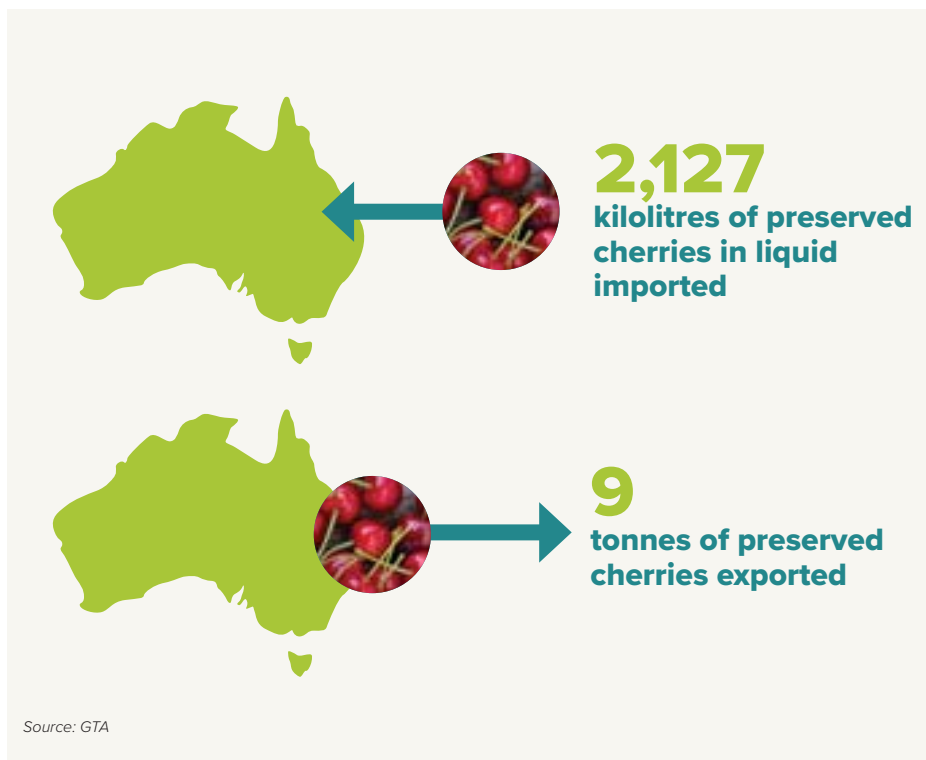
Source: GTA



Processed Cherries International Trade

2021/22 PROCESSED CHERRIES INTERNATIONAL TRADE

For the year ending June 2022, an additional **2,127 kilolitres** of preserved cherries in liquid were imported, while **9 tonnes** of preserved cherries were exported.

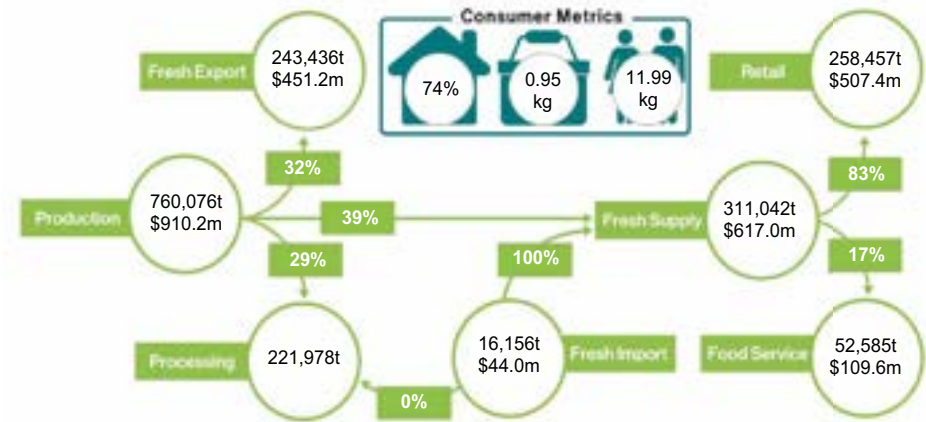




Citrus - Overview

Fresh Citrus Overview

FRESH CITRUS SUPPLY CHAIN – YEAR ENDING JUNE 2022

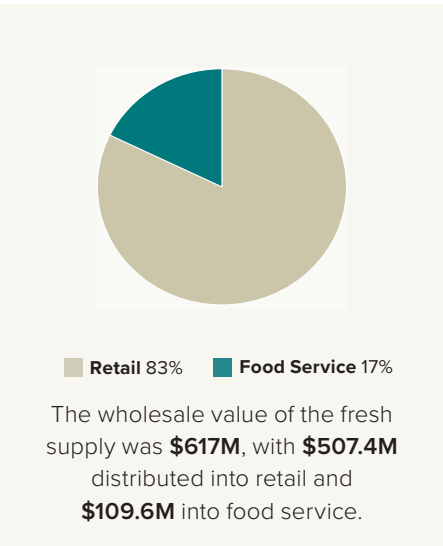


Sources: AC; Citrus Australia (CA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION:



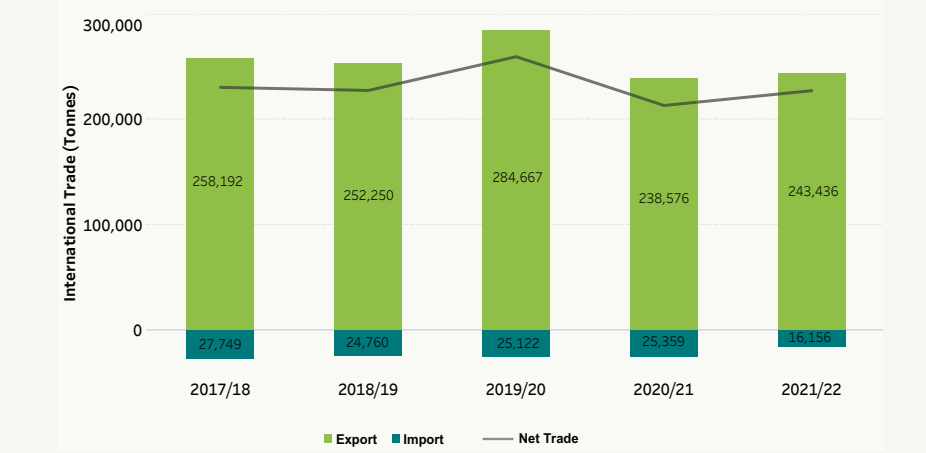
RETAIL VS FOOD SERVICE:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	767,766	708,827	-8%	760,076	+7%
Production (\$m)	\$942.4	\$914.2	-3%	\$910.2	>-1%
Production Trees (000 Trees)	10,961	11,276	+3%	11,276	-
Fresh Export Volume (t)	284,667	238,576	-16%	243,436	+2%
Fresh Export Value (\$m)	\$508.5	\$441.5	-13%	\$451.2	+2%
Fresh Import Volume (t)	25,122	25,359	<1%	16,156	-36%
Fresh Import Value (\$m)	\$60.0	\$62.6	+4%	\$44.0	-30%
Fresh Supply (t)	301,866	300,916	>-1%	311,042	+3%
Fresh Supply Wholesale Value (\$m)	\$619.0	\$658.8	+6%	\$617.0	-6%
Supply per Capita (kg)	11.70	11.69	>-1%	11.99	+5%
Retail Supply (t)	253,488	252,063	>-1%	258,457	+3%
Retail Supply Wholesale Value (\$m)	\$516.6	\$546.2	+6%	\$507.4	-7%
Food Service Supply (t)	48,379	48,853	<1%	52,585	+8%
Food Service Wholesale Value (\$m)	\$102.4	\$112.6	+10%	\$109.6	-3%

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

FRESH CITRUS INTERNATIONAL TRADE



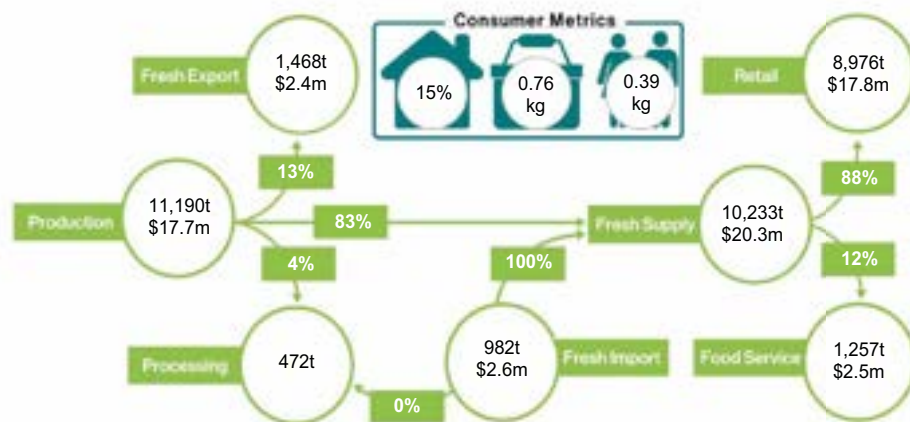


Citrus - Grapefruit



Fresh Grapefruit Overview

FRESH GRAPEFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

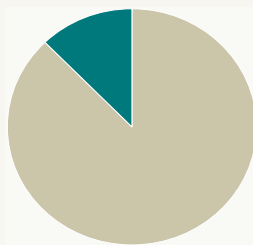
TOTAL PRODUCTION:



\$17.7M

11,190t produced and valued at **\$17.7M** with 4% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was **\$20.3M**, with **\$17.8M** distributed into retail and **\$2.5M** into food service.

CONSUMER METRICS:



15%

15% of Australian households purchased grapefruit, buying an average of **759g** per shopping trip.

PER CAPITA CONSUMPTION:

0.39kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	12,055	11,792	-2%	11,190	-5%
Production (\$m)	\$18.4	\$21.0	+14%	\$17.7	-16%
Production Trees (000 Trees)	122	120	-2%	120	-
Fresh Export Volume (t)	1,706	2,256	+32%	1,468	-35%
Fresh Export Value (\$m)	\$2.7	\$3.8	+39%	\$2.4	-38%
Fresh Import Volume (t)	1,022	1,353	+32%	982	-27%
Fresh Import Value (\$m)	\$2.4	\$3.0	+26%	\$2.6	-14%
Fresh Supply (t)	10,863	10,393	-4%	10,233	-2%
Fresh Supply Wholesale Value (\$m)	\$20.8	\$23.9	+15%	\$20.3	-15%
Supply per Capita (kg)	0.42	0.40	-4%	0.39	>-1%
Retail Supply (t)	9,613	9,156	-5%	8,976	-2%
Retail Supply Wholesale Value (\$m)	\$18.4	\$21.0	+14%	\$17.8	-15%
Food Service Supply (t)	1,250	1,236	-1%	1,257	+2%
Food Service Wholesale Value (\$m)	\$2.4	\$2.8	+19%	\$2.5	-12%

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

Fresh Grapefruit Production

MAJOR PRODUCTION AREAS



Source: CA

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

PRODUCTION TREES:



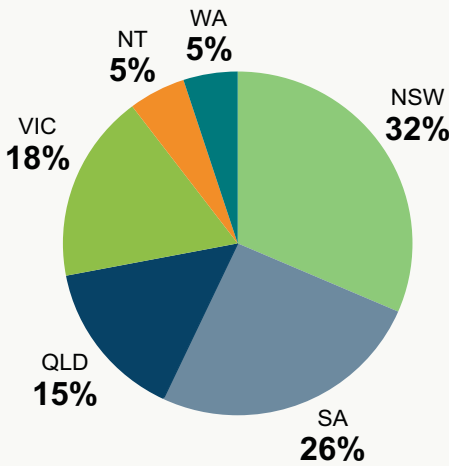
120
trees

PRODUCTION WINDOW:



Feb-Dec

2021/22 FRESH GRAPEFRUIT PRODUCTION BY STATE



Source: CA

2021/22 FRESH GRAPEFRUIT SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	3,525	\$5.6	High	High	Medium	Medium	Medium	Medium	None	Low	Low	Low	Low	Low
South Australia	2,854	\$4.5	High	High	Medium	Medium	Medium	Medium	None	Low	Low	Low	Low	High
Victoria	1,981	\$3.1	High	Medium	Medium	Medium	Medium	Medium	None	Low	Low	Low	Low	High
Queensland	1,679	\$2.7	Medium	High	High	Medium	Medium	None	None	None	Low	Low	Low	Medium
Northern Territory	593	\$0.9	Medium	Medium	Medium	Medium	Medium	Medium	None	Low	Low	Low	Low	Medium
Western Australia	560	\$0.9	Medium	Medium	Medium	Medium	Medium	Medium	None	Low	Low	Low	Low	Medium

Availability legend: High Medium Low None

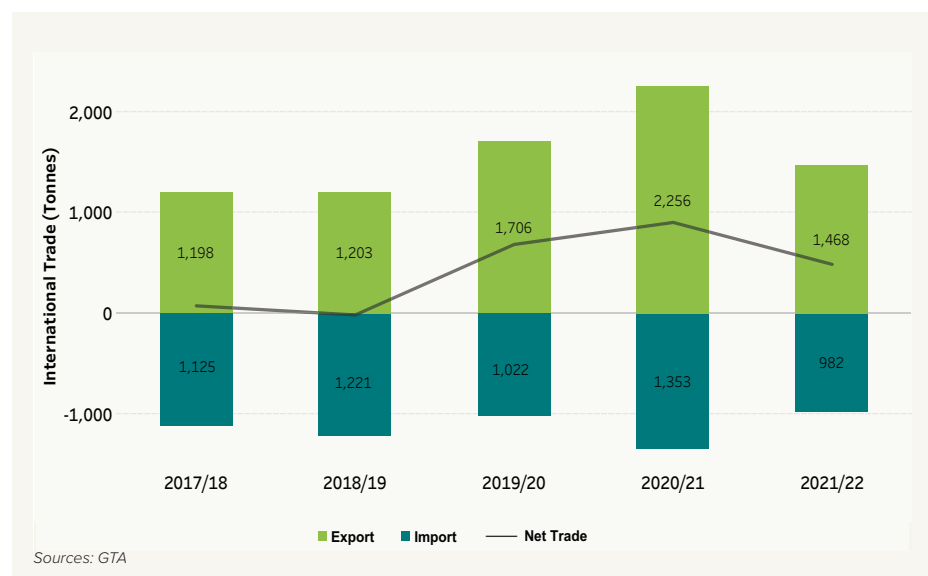
Source: CA



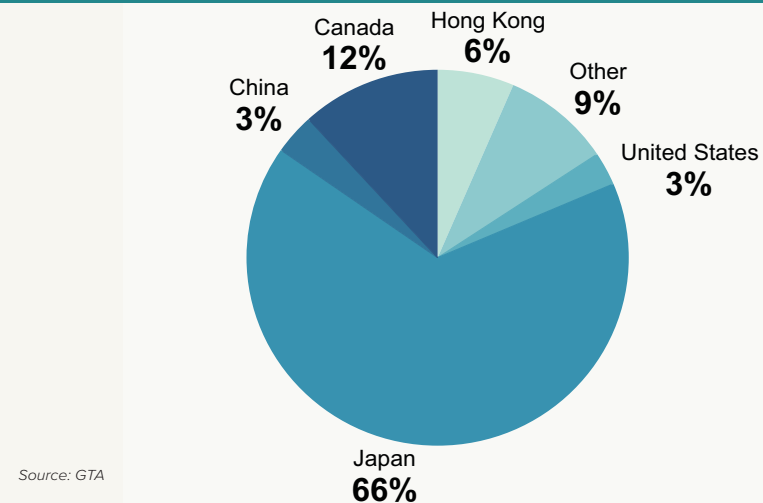
Fresh Grapefruit International Trade

FRESH GRAPEFRUIT INTERNATIONAL TRADE

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



2021/22 FRESH GRAPEFRUIT EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **66%** of exported fresh grapefruit were sent to **Japan**, as profiled in the chart above.

FRESH GRAPEFRUIT IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Victoria	496	609	554	South Australia	1,003	1,199	794
New South Wales	318	423	299	New South Wales	486	807	450
Western Australia	209	320	116	Victoria	206	240	218
South Australia	-	-	12	Queensland	11	9	5
TOTAL	1,022	1,353	982	Northern Territory	-	< 0.5	< 0.5
				Other	< 0.5	1	< 0.5
				TOTAL	1,706	2,256	1,468

FRESH GRAPEFRUIT IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	699	847	692	v	1,019	1,511	971
Israel	280	340	189	Canada	216	257	173
Egypt	42	166	56	Hong Kong	< 0.5	59	95
Spain	-	-	45	China	291	303	51
Vietnam	-	-	1	US	-	-	42
Other	1	< 0.5	< 0.5	Other	181	126	136
TOTAL	1,022	1,353	982	TOTAL	1,706	2,256	1,468

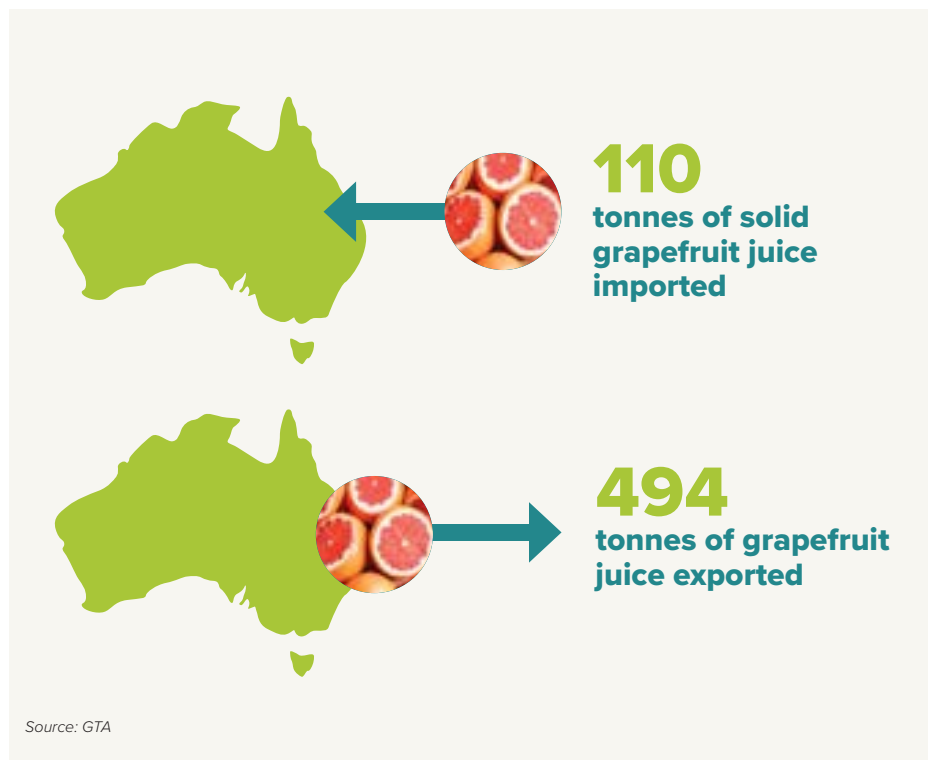
Source: GTA



Processed Grapefruit International Trade

2021/22 PROCESSED GRAPEFRUIT INTERNATIONAL TRADE

For the year ending June 2022, an additional **110 tonnes** of solid grapefruit juice were imported, while **494 tonnes** of grapefruit juice were exported.



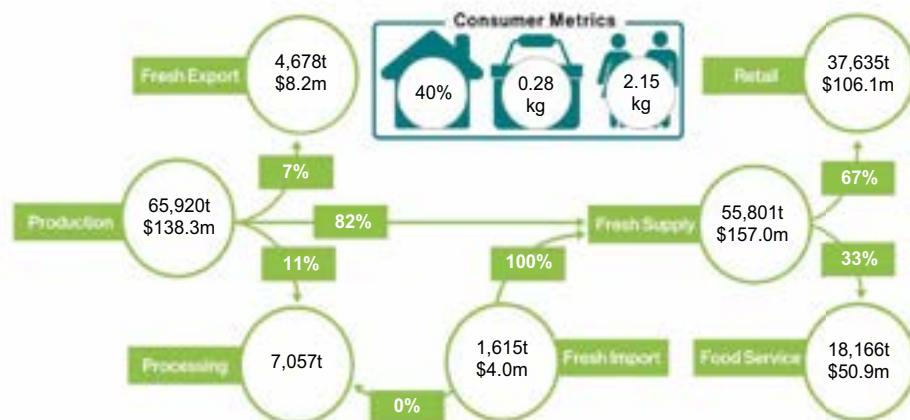


Citrus - Lemon/Lime



Fresh Lemon/Lime Overview

FRESH LEMON/LIME SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

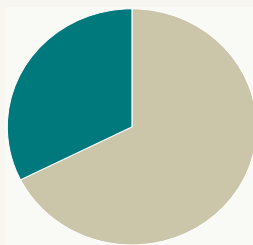
TOTAL PRODUCTION:



\$138.3M

65,920t produced and valued at **\$138.3M** with 11% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 67% ■ Food Service 33%

The wholesale value of the fresh supply was **\$157M**, with **\$106.1M** distributed into retail and **\$50.9M** into food service.

CONSUMER METRICS:



40%

40% of Australian households purchased lemon/lime, buying an average of **282g** per shopping trip.

PER CAPITA CONSUMPTION:

2.15kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	71,432	59,838	-16%	65,920	+10%
Production (\$m)	\$152.3	\$135.8	-11%	\$138.3	+2%
Production Trees (000 Trees)	645	669	+4%	669	-
Fresh Export Volume (t)	4,206	4,197	>-1%	4,678	+11%
Fresh Export Value (\$m)	\$7.9	\$8.4	+6%	\$8.2	-3%
Fresh Import Volume (t)	3,902	6,636	+70%	1,615	-76%
Fresh Import Value (\$m)	\$10.3	\$18.1	+76%	\$4.0	-78%
Fresh Supply (t)	64,205	56,167	-13%	55,801	>-1%
Fresh Supply Wholesale Value (\$m)	\$180.6	\$169.6	-6%	\$157.0	-7%
Supply per Capita (kg)	2.49	2.18	-12%	2.15	<1%
Retail Supply (t)	44,280	37,923	-14%	37,635	>-1%
Retail Supply Wholesale Value (\$m)	\$124.5	\$114.8	-8%	\$106.1	-8%
Food Service Supply (t)	19,926	18,244	-8%	18,166	>-1%
Food Service Wholesale Value (\$m)	\$56.0	\$54.8	-2%	\$50.9	-7%

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

Fresh Lemon/Lime Production

MAJOR PRODUCTION AREAS



Source: CA

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

PRODUCTION TREES:



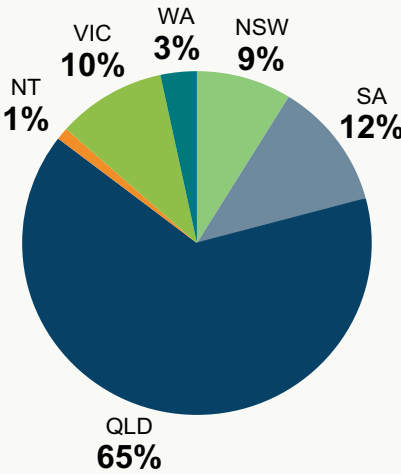
669
trees

PRODUCTION WINDOW:



Jan-Nov

2021/22 FRESH LEMON/LIME PRODUCTION BY STATE



Source: CA

2021/22 FRESH LEMON/LIME SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	42,555	\$94.3	High	High	Medium	Medium	Low	None	Low	Medium	Medium	Medium	Medium	High
South Australia	7,943	\$15.6	None	Low	Medium	Medium	Medium	None	None	None	None	None	None	None
Victoria	6,657	\$11.8	Low	Medium	Medium	Medium	None	None	None	None	None	None	None	Low
New South Wales	5,800	\$10.3	High	High	Medium	Medium	None	None	Low	Medium	Medium	Medium	High	High
Western Australia	2,208	\$4.8	High	Medium	Medium	Medium	None	None	Low	Medium	Medium	Medium	Medium	High
Northern Territory	758	\$1.4	Medium	Medium	Medium	Medium	None	None	None	None	Low	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: CA



MAIN LEMON/LIME VARIETIES

For the year ending June 2022:

Lemons accounted for **70%** of fresh production.

Limes accounted for **30%** of fresh production.



Lemons
70%

Limes
30%

Sources: CA

2021/22 FRESH LEMON/LIME SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	42,997	High	Medium	Low	Low	None	None	None	Low	Medium	Medium	Medium	High
Limes	23,112	None	None	Low	Low	Low	Low	Medium	Medium	High	Medium	Low	None

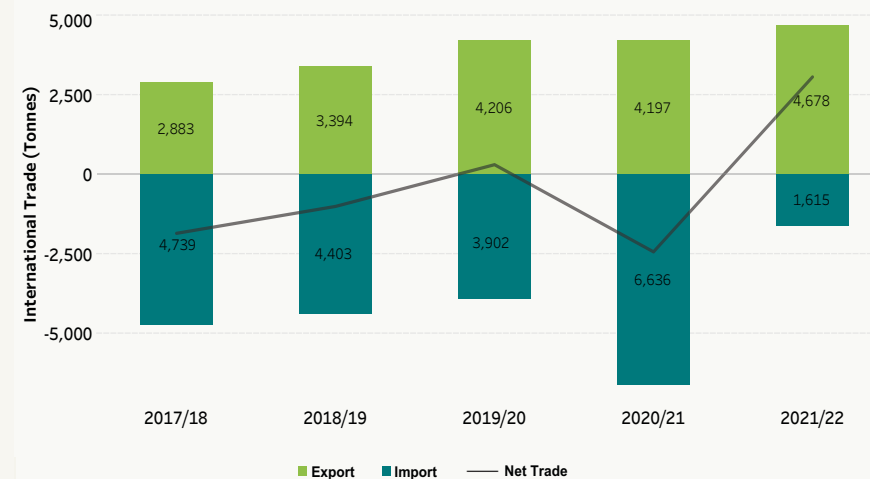
Availability legend: High Medium Low None

Sources: CA

Fresh Lemon/Lime International Trade

FRESH LEMON/LIME INTERNATIONAL TRADE

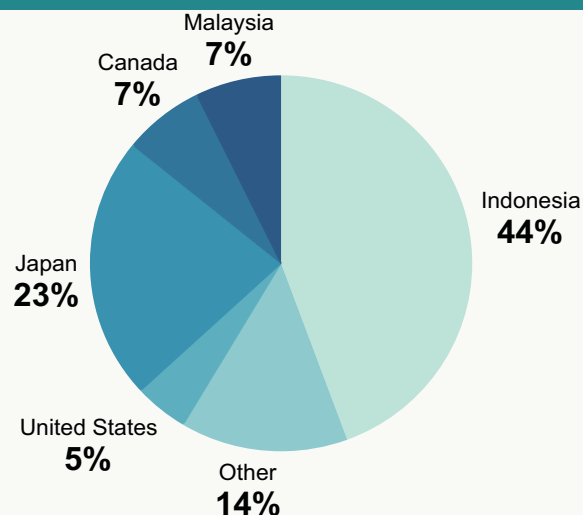
Australia has traditionally been a net importer of fresh lemons and limes, with a significant amount of imports being sourced from the US and Egypt. Exports have been growing in the last five years. The exports and imports over the last five financial years are profiled in the graph below, where imports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



Sources: GTA



2021/22 FRESH GRAPEFRUIT EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **44%** of exported fresh lemon/limes were sent to **Indonesia**, as profiled in the chart above.

FRESH LEMON/LIME IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	2,021	2,385	634	South Australia	1,237	1,567	2,045
Victoria	1,176	2,677	604	Victoria	1,190	1,426	1,326
Western Australia	589	1,071	377	New South Wales	639	554	709
Queensland	117	503	-	Queensland	1,129	644	593
TOTAL	3,902	6,636	1,615	Western Australia	10	7	3
				Other	< 0.5	< 0.5	1
				TOTAL	4,206	4,197	4,678

FRESH LEMON/LIME IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	2,646	4,273	878	Indonesia	1,761	2,004	2,076
Egypt	1,063	2,168	658	Japan	131	649	1,062
Spain	189	187	73	Malaysia	77	58	340
UAE	-	3	4	Canada	699	406	321
Iran	4	2	2	US	43	257	214
Other	-	1	< 0.5	Other	1,496	823	663
TOTAL	3,902	6,634	1,615	TOTAL	4,206	4,197	4,678

Source: GTA

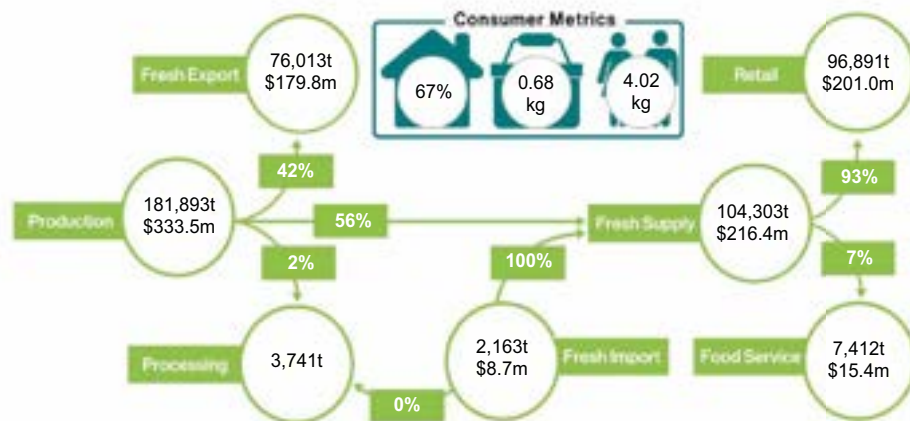


Citrus - Mandarins



Fresh Mandarins Overview

FRESH MANDARINS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

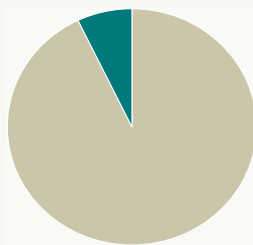
TOTAL PRODUCTION:



\$333.5M

181,893t produced and valued at **\$333.5M** with **2%** sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 93% ■ Food Service 7%

The wholesale value of the fresh supply was **\$216.4M**, with **\$201M** distributed into retail and **\$15.4M** into food service.

CONSUMER METRICS:



67%

67% of Australian households purchased mandarins, buying an average of **676g** per shopping trip.

PER CAPITA CONSUMPTION:

4.02kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	172,934	163,499	-5%	181,893	+11%
Production (\$m)	\$357.0	\$319.8	-10%	\$333.5	+4%
Production Trees (000 Trees)	2,636	2,846	+8%	2,846	-
Fresh Export Volume (t)	77,316	59,563	-23%	76,013	+28%
Fresh Export Value (\$m)	\$187.2	\$143.8	-23%	\$179.8	+25%
Fresh Import Volume (t)	3,360	3,350	>-1%	2,163	-35%
Fresh Import Value (\$m)	\$10.5	\$10.4	>-1%	\$8.7	-16%
Fresh Supply (t)	95,587	103,924	+9%	104,303	<1%
Fresh Supply Wholesale Value (\$m)	\$240.6	\$239.5	>-1%	\$216.4	-10%
Supply per Capita (kg)	3.70	4.04	+9%	4.02	>-1%
Retail Supply (t)	89,334	96,741	+8%	96,891	<1%
Retail Supply Wholesale Value (\$m)	\$224.8	\$223.0	>-1%	\$201.0	-10%
Food Service Supply (t)	6,253	7,183	+15%	7,412	+3%
Food Service Wholesale Value (\$m)	\$15.7	\$16.6	+5%	\$15.4	-7%

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

Fresh Mandarins Production

MAJOR PRODUCTION AREAS



Source: CA

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

PRODUCTION TREES:



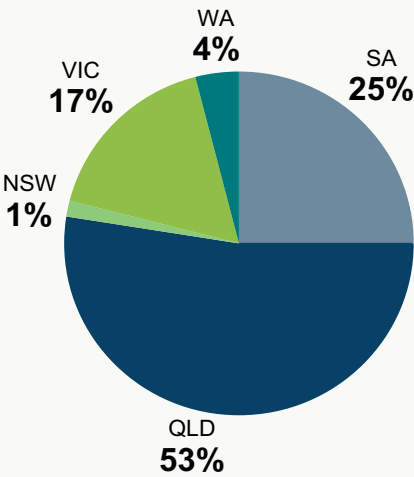
2,846
trees

PRODUCTION WINDOW:



Mar-Oct

2021/22 FRESH MANDARINS PRODUCTION BY STATE



Source: CA

2021/22 FRESH MANDARINS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	95,494	\$175.1	High	High	Medium	Low	None	None	None	None	Medium	Medium	Medium	High
South Australia	45,473	\$83.4	High	High	Medium	None	None	None	None	None	Medium	Medium	Medium	Medium
Victoria	30,922	\$56.7	High	High	Medium	None	None	None	None	None	Medium	Medium	Medium	Medium
Western Australia	7,276	\$13.3	High	Medium	Medium	Medium	None	None	None	None	Medium	Medium	Medium	Medium
New South Wales	2,728	\$5.0	Medium	High	High	Medium	None	None	None	None	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: CA



MAIN MANDARINS VARIETIES

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

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

Imperial mandarins, an early season mandarin with fine smooth glossy skin and a low seed count. Imperial mandarins accounted for **24%** of fresh production for the year ending June 2022.

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



Murcott
29%

Imperial
24%

Afourer
23%

Sources: CA

2021/22 FRESH MANDARINS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Afourer	39,744	High	Medium	Low	None	None	None	None	None	None	Low	Medium	High
Imperial	41,472	High	High	Medium	None	None	None	None	None	Low	Medium	High	High
Murcott	50,112	High	Medium	Medium	Medium	Medium	None	None	None	None	None	None	Low
Others	41,472	Medium	Medium	Medium	Medium	Medium	None	None	None	Low	Medium	Medium	Medium
Processing	3,629	Medium	Medium	Medium	Medium	None	None	None	None	Low	Medium	Medium	Medium

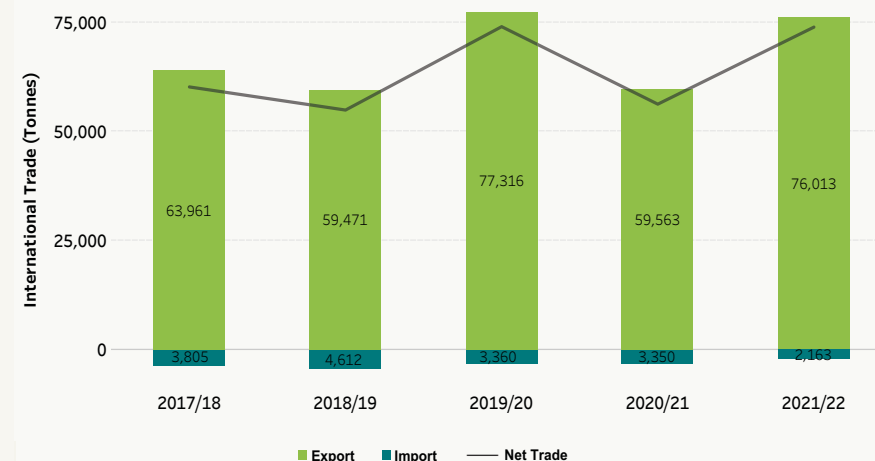
Availability legend: High Medium Low None

Sources: CA

Fresh Mandarins International Trade

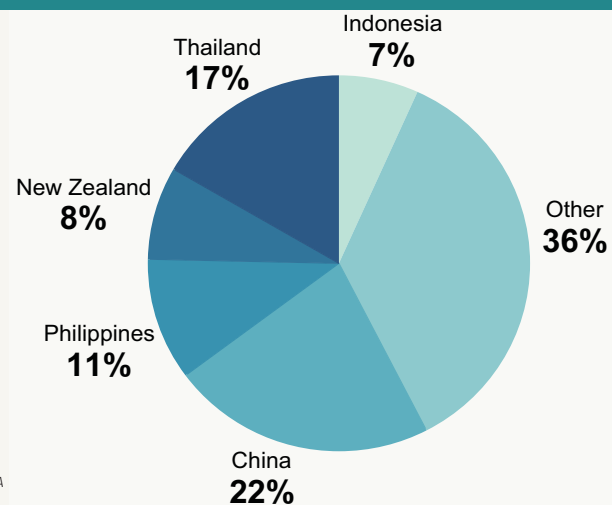
FRESH MANDARINS INTERNATIONAL TRADE

Australia is a net exporter of fresh mandarins, over the last three years an average of **64,450 tonnes** were exported per year. For the year ending June 2022, Australia exported **76,013 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA

2021/22 FRESH MANDARINS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **22%** of exported fresh mandarins were sent to **China**, as profiled in the chart above.

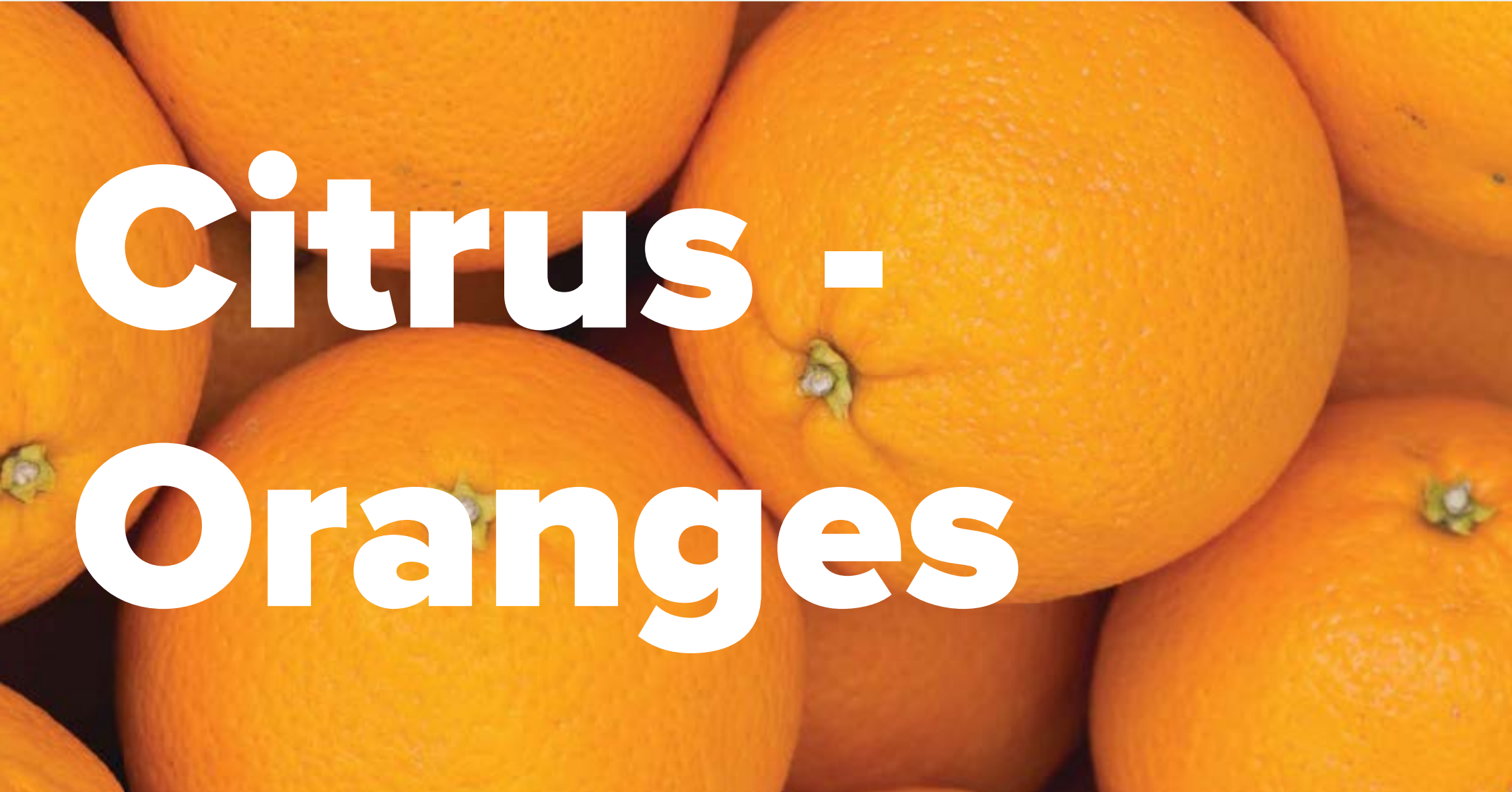
FRESH MANDARINS IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	1,776	1,470	938	Queensland	50,822	32,991	44,574
Victoria	1,004	1,221	723	South Australia	15,156	14,977	15,809
Western Australia	513	586	493	Victoria	9,285	10,009	12,490
Queensland	62	74	9	New South Wales	1,685	1,152	2,575
South Australia	4	-	-	Western Australia	369	429	559
TOTAL	3,360	3,350	2,163	Other	-	5	6
				TOTAL	77,316	59,563	76,013

FRESH MANDARINS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	2,488	2,557	1,481	China	25,110	13,349	17,032
Egypt	780	615	562	Thailand	13,220	8,579	12,645
Israel	91	79	19	Philippines	3,570	4,775	7,992
New Zealand	1	1	3	New Zealand	4,533	4,916	6,089
Turkey	-	-	< 0.5	Indonesia	4,374	2,548	5,111
Other	< 0.5	98	98	Other	26,509	25,395	27,144
TOTAL	3,360	3,350	2,163	TOTAL	77,316	59,563	76,013

Source: GTA

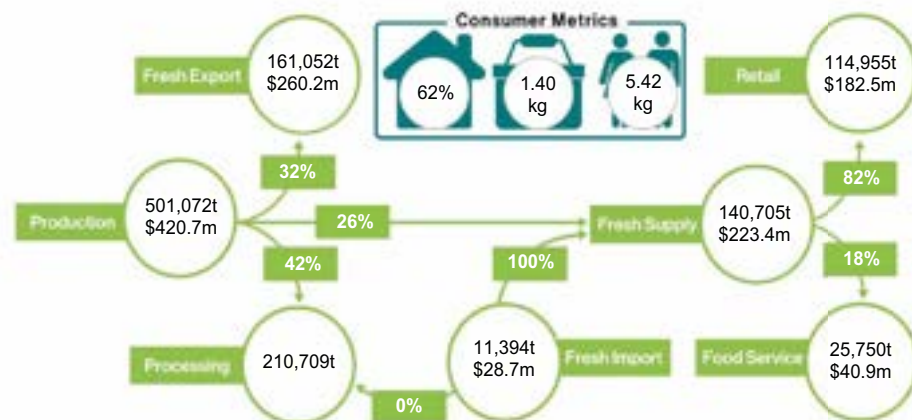


Citrus - Oranges



Fresh Oranges Overview

FRESH ORANGES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

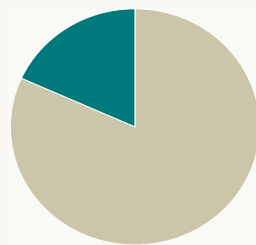
TOTAL PRODUCTION:



\$420.7M

501,072t produced and valued at **\$420.7M** with 42% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 82% ■ Food Service 18%

The wholesale value of the fresh supply was **\$223.4M**, with **\$182.5M** distributed into retail and **\$40.9M** into food service.

CONSUMER METRICS:



62%

62% of Australian households purchased oranges, buying an average of **1.40kg** per shopping trip.

PER CAPITA CONSUMPTION:

5.42kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	511,345	473,697	-7%	501,072	+6%
Production (\$m)	\$414.7	\$437.6	+6%	\$420.7	-4%
Production Trees (000 Trees)	7,558	7,637	+1%	7,637	-
Fresh Export Volume (t)	201,268	172,416	-14%	161,052	-7%
Fresh Export Value (\$m)	\$310.1	\$285.1	-8%	\$260.2	-9%
Fresh Import Volume (t)	16,834	14,009	-17%	11,394	-19%
Fresh Import Value (\$m)	\$36.7	\$31.0	-16%	\$28.7	-7%
Fresh Supply (t)	131,211	130,432	>-1%	140,705	+8%
Fresh Supply Wholesale Value (\$m)	\$177.1	\$225.8	+27%	\$223.4	-1%
Supply per Capita (kg)	5.09	5.07	>-1%	5.42	+9%
Retail Supply (t)	110,262	108,243	-2%	114,955	+6%
Retail Supply Wholesale Value (\$m)	\$148.9	\$187.4	+26%	\$182.5	-3%
Food Service Supply (t)	20,950	22,190	+6%	25,750	+16%
Food Service Wholesale Value (\$m)	\$28.3	\$38.4	+36%	\$40.9	+6%

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

Fresh Oranges Production

MAJOR PRODUCTION AREAS



Source: CA

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

PRODUCTION TREES:



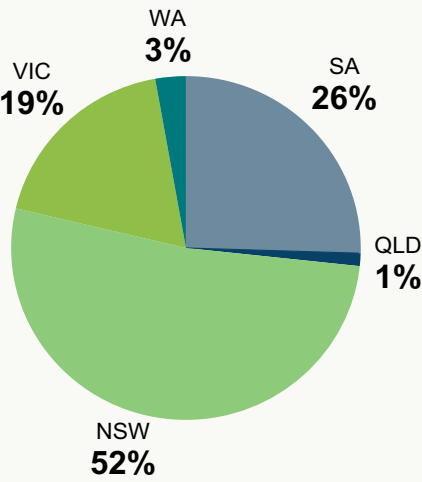
7,637
trees

PRODUCTION WINDOW:



Year-round

2021/22 FRESH ORANGES PRODUCTION BY STATE



Source: CA

2021/22 FRESH ORANGES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	260,557	\$218.8												
South Australia	127,773	\$107.3												
Victoria	92,698	\$77.8												
Western Australia	14,030	\$11.8												
Queensland	6,013	\$5.0												

Availability legend: High Medium Low None

Source: CA



MAIN ORANGES VARIETIES

Production is dominated by two main varieties as indicated below:

Navel, an orange that grows during the winter months. The majority of navels grown are destined for the fresh market, and accounted for **85%** of the production sent to the fresh market.

Valencia, an orange that grows during the summer months. The majority of Valencias grown are destined for the juicing market, and accounted for **12%** of fresh production but contributed the majority of processed production.

Other varieties, including **blood oranges** and **Cara Cara oranges**, are accounted for less than **3%** of fresh production.



Navel
85%

Valencia
12%

Others
3%

Sources: CA

2021/22 FRESH ORANGES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	249,684	High	High	High	Medium	Medium	None	None	None	None	None	Low	Low
Valencia	33,781	None	None	Medium	Medium	Medium	High	High	Medium	Medium	Medium	None	None
Other	10,281	None	None	None	None	None	None	Medium	Medium	Medium	Medium	None	None

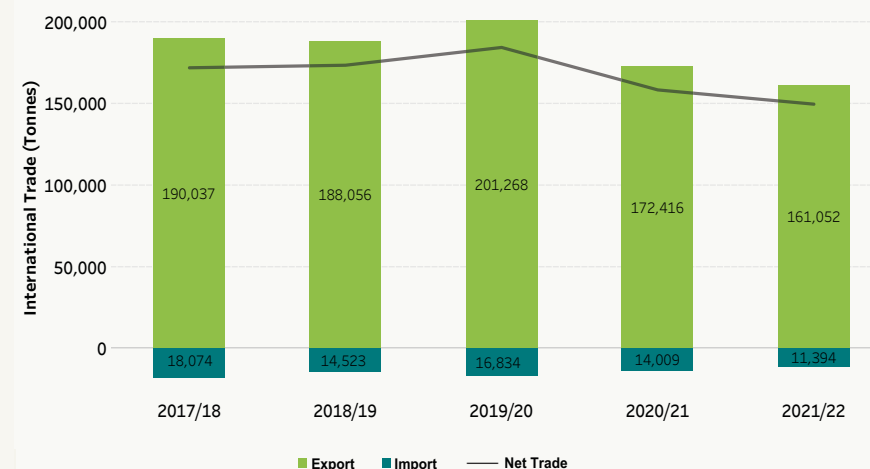
Availability legend: High Medium Low None

Sources: CA

Fresh Oranges International Trade

FRESH ORANGES INTERNATIONAL TRADE

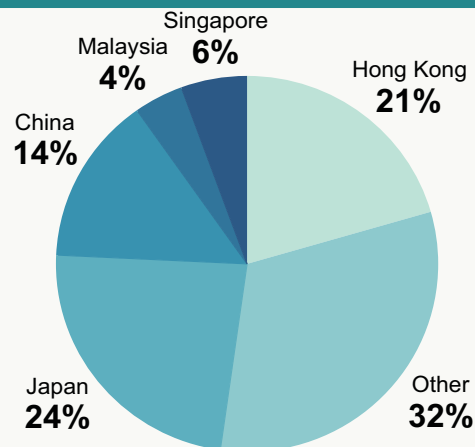
Australia is a net exporter of fresh oranges, growth in volumes over the last three years has in an average of **187,247 tonnes** per year. For the year ending June 2022, Australia exported **161,052 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH ORANGES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **24%** of exported fresh oranges were sent to **Japan**, as profiled in the chart above.

Processed Oranges International Trade

2021/22 PROCESSED ORANGES INTERNATIONAL TRADE

For the year ending June 2022, an additional **12,242 kilolitres** of frozen orange juice was imported. Australia also imported **643 kilolitres** of fresh orange juice while exporting **5,101 kilolitres** of fresh orange juice.



643
kilolitres of orange
juice imported

12,242
kilolitres of frozen
orange juice exported



5,101
kilolitres of orange
juice exported

Source: GTA

FRESH ORANGES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	7,002	6,320	6,617	Victoria	96,869	82,451	77,066
Victoria	5,772	5,513	4,098	South Australia	65,355	57,724	54,669
Western Australia	2,260	2,057	655	New South Wales	34,155	27,704	24,129
Queensland	1,704	119	24	Western Australia	3,274	3,449	3,127
South Australia	96	-	-	Queensland	1,593	1,065	1,987
Other	< 0.5	< 0.5	-	Other	21	23	75
TOTAL	16,834	14,009	11,394	TOTAL	201,268	172,416	161,052

FRESH ORANGES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	15,368	12,768	10,738	Japan	36,325	37,625	37,857
Egypt	1,233	1,166	560	Hong Kong	30,763	33,587	33,050
Spain	147	72	48	China	46,255	31,684	23,343
Iran	< 0.5	2	1	Singapore	11,362	8,421	9,002
South Africa	< 0.5	< 0.5	< 0.5	Malaysia	12,165	7,705	6,713
Other	85	1	46	Other	64,399	53,394	51,087
TOTAL	16,834	14,009	11,394	TOTAL	201,268	172,416	161,052

Source: GTA

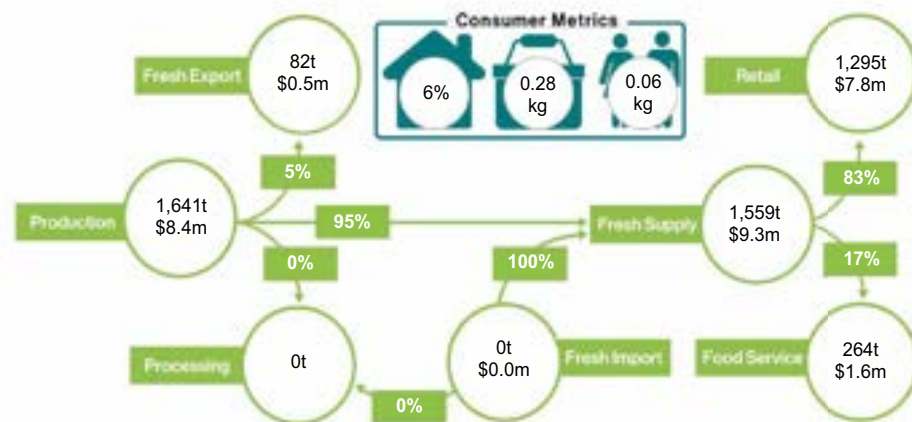
Custard Apples





Fresh Custard Apples Overview

FRESH CUSTARD APPLES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

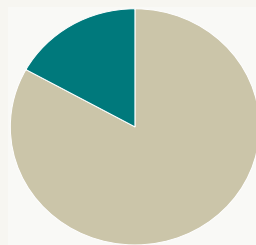
TOTAL PRODUCTION:



\$8.4M

1,641t produced and valued at **\$8.4M**

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$9.3M**, with **\$7.8M** distributed into retail and **\$1.6M** into food service.

CONSUMER METRICS:



6%

6% of Australian households purchased custard apples, buying an average of **277g** per shopping trip.

PER CAPITA CONSUMPTION:

0.06kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	1,422	1,836	+29%	1,641	-11%
Production (\$m)	\$5.9	\$7.8	+33%	\$8.4	+7%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	71	92	+29%	82	-11%
Fresh Export Value (\$m)	\$0.4	\$0.5	+33%	\$0.5	+7%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	1,351	1,744	+29%	1,559	-11%
Fresh Supply Wholesale Value (\$m)	\$6.5	\$8.7	+33%	\$9.3	+7%
Supply per Capita (kg)	0.05	0.07	+29%	0.06	-9%
Retail Supply (t)	1,175	1,454	+24%	1,295	-11%
Retail Supply Wholesale Value (\$m)	\$5.7	\$7.3	+28%	\$7.8	+7%
Food Service Supply (t)	176	291	+65%	264	-9%
Food Service Wholesale Value (\$m)	\$0.9	\$1.5	+70%	\$1.6	+9%

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

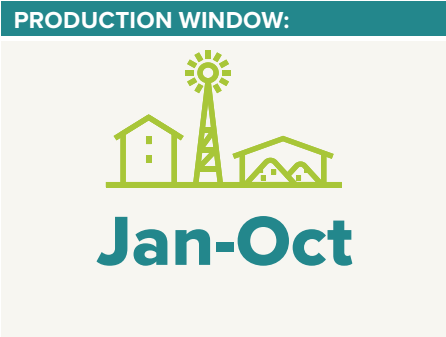
Fresh Custard Apples Production

MAJOR PRODUCTION AREAS

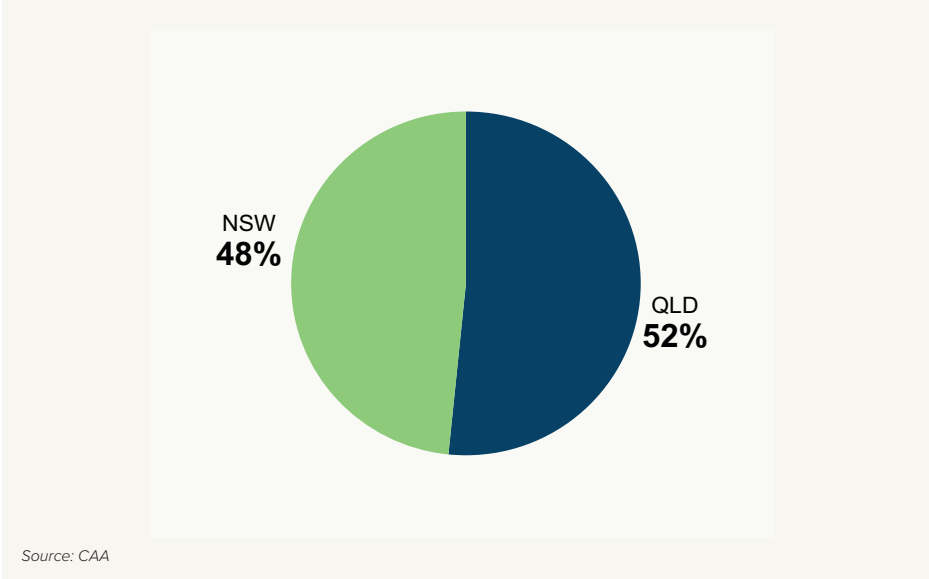


Source: CAA

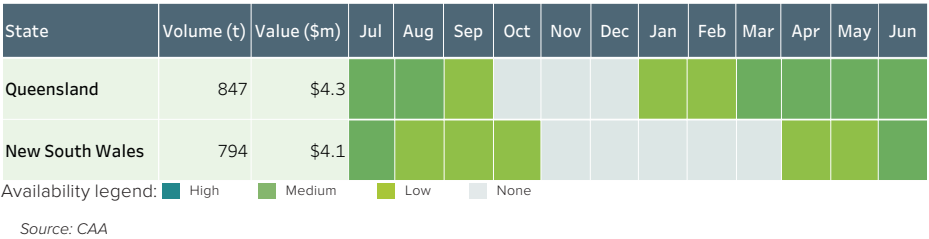
Custard apple production occurs in Queensland and northern New South Wales. The volume of custard apples that Australia imports and exports is negligible. The type of custard apple grown in Australia is unique in the world known botanically as an atemoya.



2021/22 FRESH CUSTARD APPLE PRODUCTION BY STATE



2021/22 FRESH CUSTARD APPLE SEASONALITY BY STATE



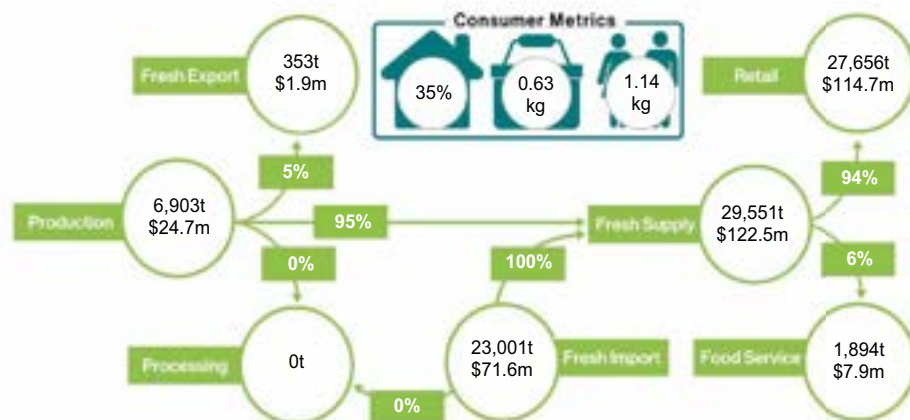
Kiwifruit

A close-up photograph of two sliced kiwifruit. The kiwifruit are cut in half, revealing the bright green flesh and the central core with small black seeds. The kiwifruit are arranged in a cluster, with some whole kiwifruit visible in the background. The lighting is warm, highlighting the texture of the fruit.



Fresh Kiwifruit Overview

FRESH KIWIFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

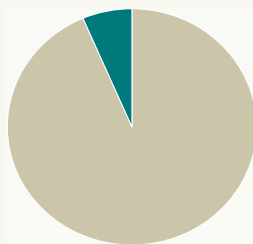
TOTAL PRODUCTION:



\$24.7M

6,903t produced and valued at **\$24.7M**

RETAIL VS FOOD SERVICE:



■ Retail 94% ■ Food Service 6%

The wholesale value of the fresh supply was **\$122.5M**, with **\$114.7M** distributed into retail and **\$7.9M** into food service.

CONSUMER METRICS:



35%

35% of Australian households purchased kiwifruit, buying an average of **629g** per shopping trip.

PER CAPITA CONSUMPTION:

1.14kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	7,375	6,933	-6%	6,903	>-1%
Production (\$m)	\$24.1	\$24.4	+1%	\$24.7	+2%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	605	727	+20%	353	-51%
Fresh Export Value (\$m)	\$3.0	\$4.3	+42%	\$1.9	-55%
Fresh Import Volume (t)	22,883	23,725	+4%	23,001	-3%
Fresh Import Value (\$m)	\$69.5	\$74.8	+8%	\$71.6	-4%
Fresh Supply (t)	29,653	29,930	<1%	29,551	-1%
Fresh Supply Wholesale Value (\$m)	\$111.0	\$117.6	+6%	\$122.5	+4%
Supply per Capita (kg)	1.15	1.16	+1%	1.14	-2%
Retail Supply (t)	27,918	28,025	<1%	27,656	-1%
Retail Supply Wholesale Value (\$m)	\$104.5	\$110.1	+5%	\$114.7	+4%
Food Service Supply (t)	1,734	1,906	+10%	1,894	>-1%
Food Service Wholesale Value (\$m)	\$6.5	\$7.5	+15%	\$7.9	+5%

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

Fresh Kiwifruit Production

MAJOR PRODUCTION AREAS



Source: (Freshlogic Analysis)

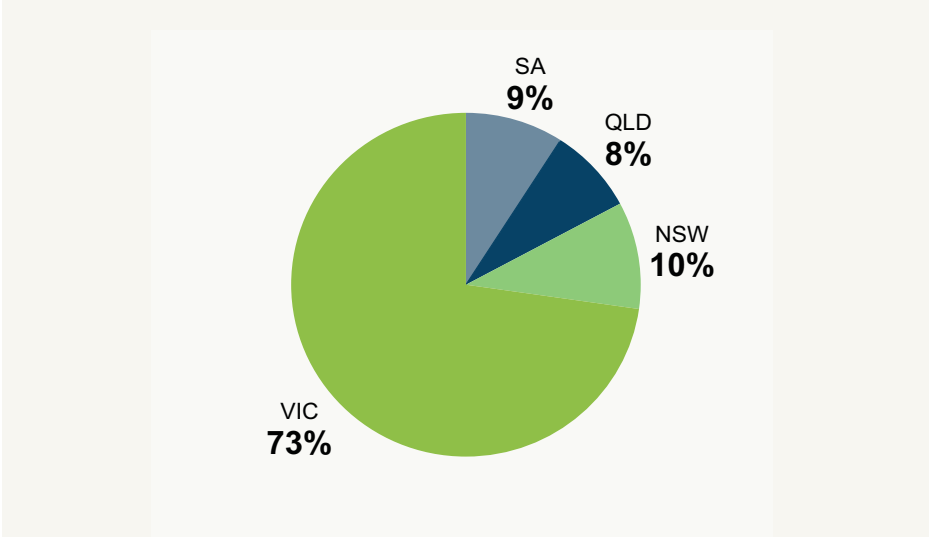
Kiwifruit production occurs predominantly in the southern states of Australia, with a larger volume being sourced from imports. The Australian season occurs between March and July . Year-round availability is made possible through imports, predominantly from New Zealand and Europe.

PRODUCTION WINDOW:



Mar-Aug

2021/22 FRESH KIWIFRUIT PRODUCTION BY STATE



Source: (Freshlogic Analysis)

2021/22 FRESH KIWIFRUIT SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	5,021	\$18.0	Low	Low	None	None	None	None	None	None	None	High	High	Medium
New South Wales	697	\$2.5	Low	None	None	None	None	None	None	None	Medium	Medium	Medium	Medium
South Australia	628	\$2.2	Low	None	None	None	None	None	None	None	None	None	Medium	Medium
Queensland	558	\$2.0	Low	None	None	None	None	None	None	None	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: (Freshlogic Analysis)



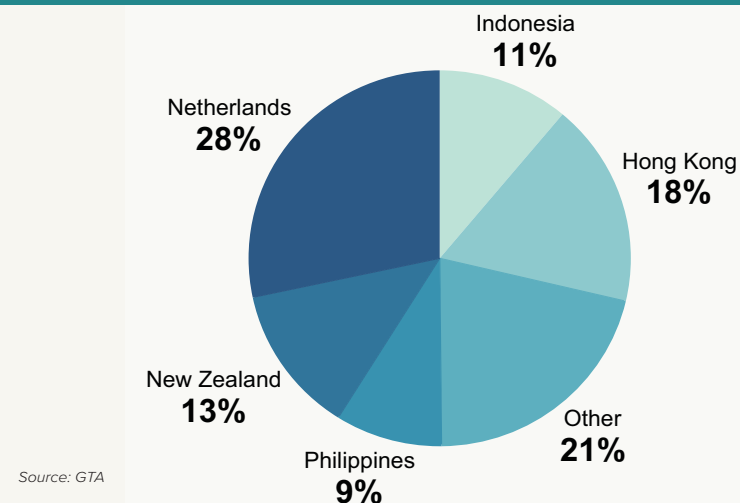
Fresh Kiwifruit International Trade

FRESH KIWIFRUIT INTERNATIONAL TRADE

Australia is a net importer of fresh kiwifruit, typically importing between **20,000-24,000 tonnes** per year. For the year ending June 2022, Australia imported **23,001 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH KIWIFRUIT EXPORTS BY COUNTRY



For the year ending June 2022, **28%** of exported fresh kiwifruit were sent to **Netherlands**, as profiled in the chart above.

FRESH KIWIFRUIT IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	10,883	10,612	9,815	Victoria	321	287	204
Victoria	7,283	8,032	7,728	Queensland	79	58	35
Queensland	2,423	2,621	3,256	New South Wales	16	71	8
Western Australia	1,851	2,191	1,730	Northern Territory	-	< 0.5	< 0.5
South Australia	442	269	472	Western Australia	9	< 0.5	-
TOTAL	22,883	23,725	23,001	Other	179	312	106
				TOTAL	605	727	353

FRESH KIWIFRUIT IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New Zealand	16,765	18,275	20,753	Netherlands	-	220	100
US	94	35	2,247	Hong Kong	173	242	62
Italy	6,003	5,393	-	New Zealand	-	61	45
France	21	-	-	Indonesia	1	< 0.5	39
Other	-	23	-	Philippines	-	6	32
TOTAL	22,883	23,725	23,001	Other	430	198	75
				TOTAL	605	727	353

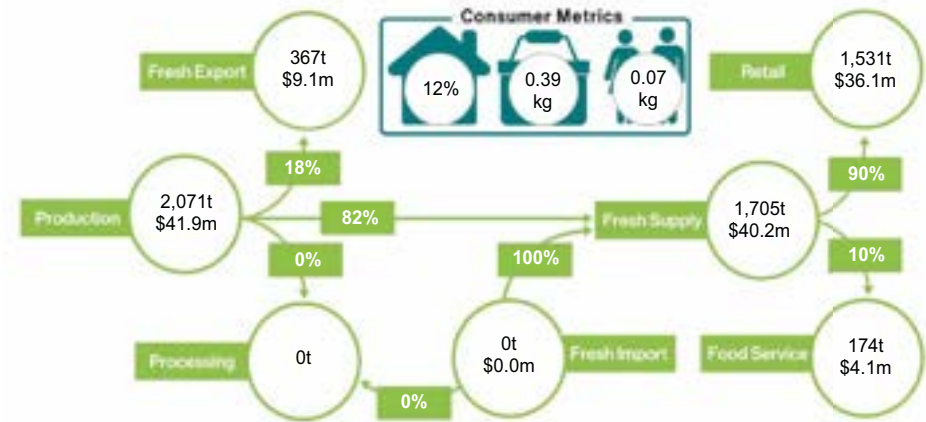
Source: GTA

Lychees



Fresh Lychees Overview

FRESH LYCHEES SUPPLY CHAIN – YEAR ENDING JUNE 2022

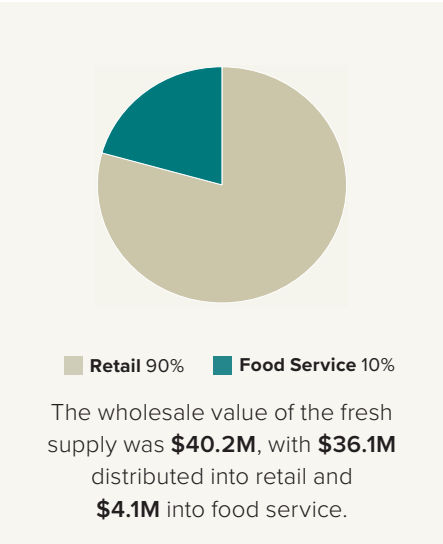


Sources: AC; Australian Lychee Growers Association (ALGA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	2,434	2,283	-6%	2,071	-9%
Production (\$m)	\$31.9	\$32.0	<1%	\$41.9	+31%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	431	404	-6%	367	-9%
Fresh Export Value (\$m)	\$6.9	\$6.9	<1%	\$9.1	+31%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	2,003	1,879	-6%	1,705	-9%
Fresh Supply Wholesale Value (\$m)	\$30.6	\$30.7	<1%	\$40.2	+31%
Supply per Capita (kg)	0.08	0.07	-6%	0.07	-10%
Retail Supply (t)	1,798	1,687	-6%	1,531	-9%
Retail Supply Wholesale Value (\$m)	\$27.5	\$27.5	<1%	\$36.1	+31%
Food Service Supply (t)	205	192	-6%	174	-9%
Food Service Wholesale Value (\$m)	\$3.1	\$3.1	<1%	\$4.1	+31%

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

Fresh Lychees Production

MAJOR PRODUCTION AREAS

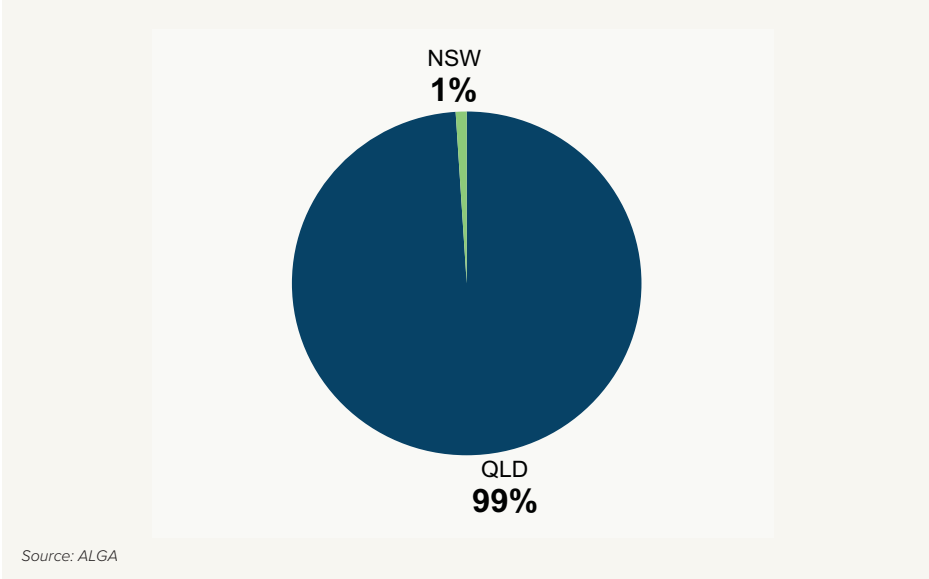


Source: ALGA

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



2021/22 FRESH LYCHEES PRODUCTION BY STATE



2021/22 FRESH LYCHEES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	2,051	\$41.4												
New South Wales	21	\$0.4												

Availability legend: High Medium Low None

Source: ALGA

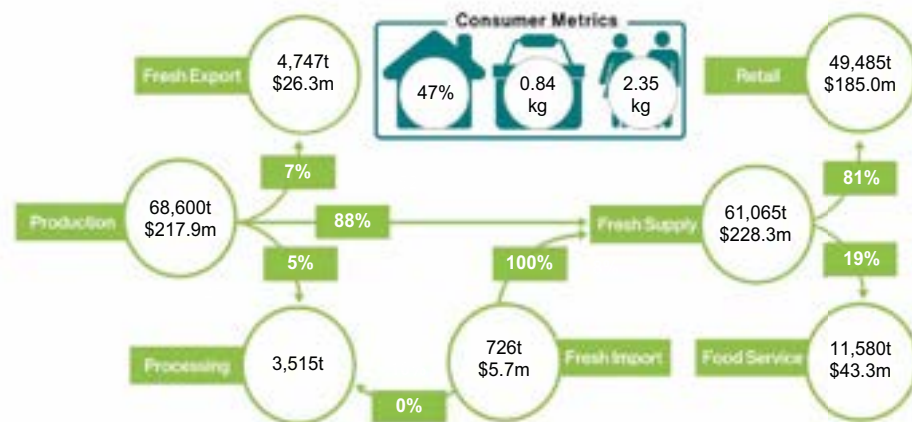
Mangoes





Fresh Mangoes Overview

FRESH MANGOES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

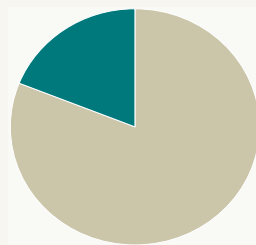
TOTAL PRODUCTION:



\$217.9M

68,600t produced and valued at **\$217.9M** with 5% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 81% ■ Food Service 19%

The wholesale value of the fresh supply was **\$228.3M**, with **\$185M** distributed into retail and **\$43.3M** into food service.

CONSUMER METRICS:



47%

47% of Australian households purchased mangoes, buying an average of **843g** per shopping trip.

PER CAPITA CONSUMPTION:

2.35kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	72,022	62,300	-13%	68,600	+10%
Production (\$m)	\$185.2	\$201.0	+9%	\$217.9	+8%
Production Trees (000 Trees)	1,441	-	-	-	-
Fresh Export Volume (t)	7,707	4,479	-42%	4,747	+6%
Fresh Export Value (\$m)	\$33.7	\$25.0	-26%	\$26.3	+5%
Fresh Import Volume (t)	838	1,007	+20%	726	-28%
Fresh Import Value (\$m)	\$4.9	\$6.7	+38%	\$5.7	-15%
Fresh Supply (t)	61,724	55,861	-9%	61,065	+9%
Fresh Supply Wholesale Value (\$m)	\$183.0	\$211.2	+15%	\$228.3	+8%
Supply per Capita (kg)	2.39	2.17	-9%	2.35	+8%
Retail Supply (t)	51,436	45,976	-11%	49,485	+8%
Retail Supply Wholesale Value (\$m)	\$152.5	\$173.8	+14%	\$185.0	+6%
Food Service Supply (t)	10,287	9,885	-4%	11,580	+17%
Food Service Wholesale Value (\$m)	\$30.5	\$37.4	+23%	\$43.3	+16%

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



Fresh Mangoes Production

MAJOR PRODUCTION AREAS



Source: AMIA

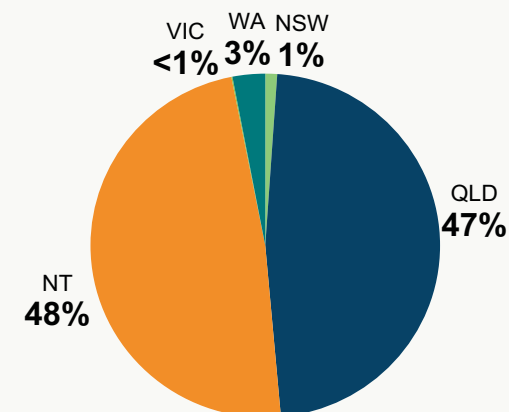
As a tropical fruit, mango production predominantly occurs in the North of Australia, particularly in Queensland and the Northern Territory.

PRODUCTION WINDOW:



Jul-Mar

2021/22 FRESH MANGOES PRODUCTION BY STATE



Source: AMIA

2021/22 FRESH MANGOES SEASONALITY BY STATE

State	Area (ha)	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	M..	Apr	May	Jun
Northern Territory	6,616	33,144	\$105.3	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	8,103	32,585	\$103.5	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	991	2,058	\$6.5	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	199	744	\$2.4	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

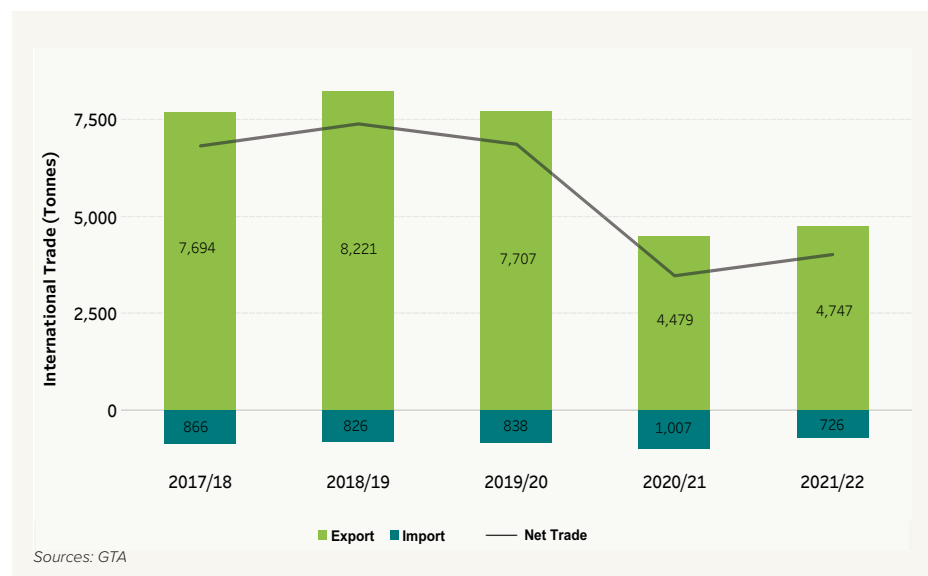
Source: AMIA



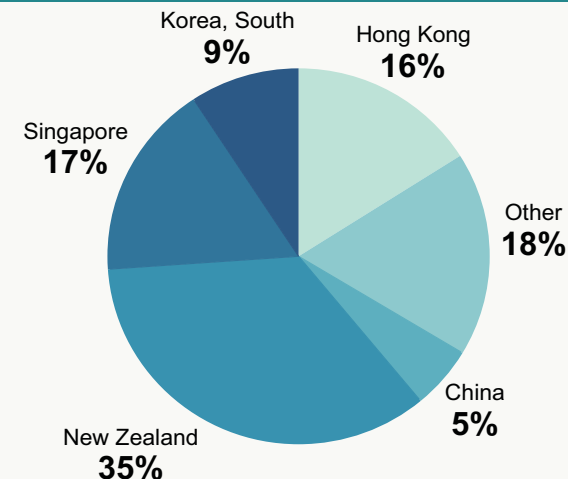
Fresh Mangoes International Trade

FRESH MANGOES INTERNATIONAL TRADE

Australia is a net exporter of fresh mangoes, with exports growing in recent years. For the year ending June 2022, Australia exported **4,747 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH MANGOES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **35%** of exported fresh mangoes were sent to **New Zealand**, as profiled in the chart above.

FRESH MANGOES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	428	470	403	Queensland	5,111	3,384	3,008
Victoria	213	268	227	Northern Territory	1,089	411	567
Western Australia	168	222	49	New South Wales	1,177	516	349
Queensland	27	40	33	Victoria	265	162	95
Northern Territory	2	3	11	Western Australia	49	5	4
Other	< 0.5	3	3	Other	15	2	725
TOTAL	838	1,007	726	TOTAL	7,707	4,479	4,747

FRESH MANGOES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Thailand	249	268	289	New Zealand	1,304	1,050	1,405
India	94	108	86	Singapore	1,544	982	677
Mexico	102	116	73	Hong Kong	1,589	582	644
Brazil	98	83	62	Sth. Korea	208	397	372
Pakistan	61	108	59	China	197	247	217
Other	235	323	158	Other	2,865	1,221	1,433
TOTAL	838	1,007	726	TOTAL	7,707	4,479	4,747

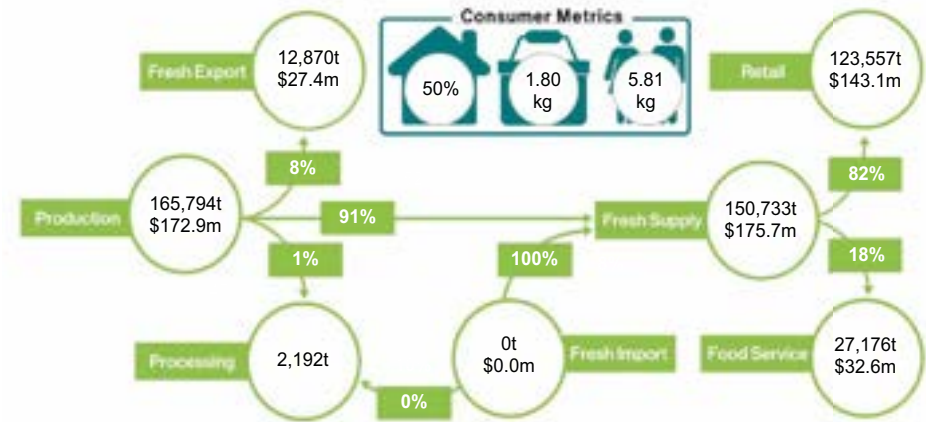
Source: GTA



Melons - Overview

Fresh Melons Overview

FRESH MELONS SUPPLY CHAIN – YEAR ENDING JUNE 2022

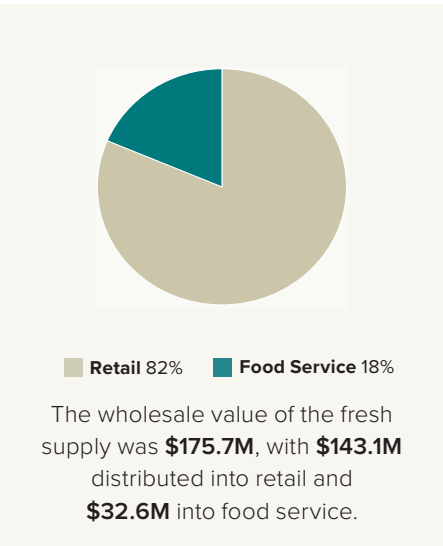


Sources: AC; Melons Australia (MA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION:



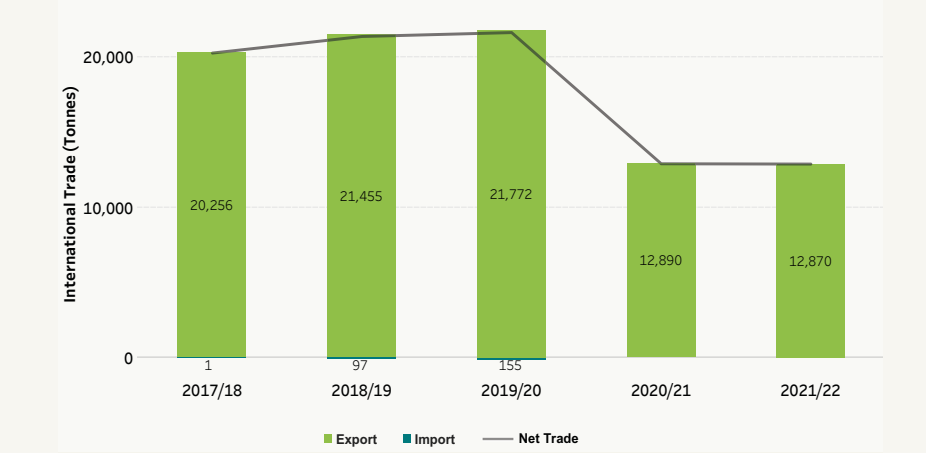
RETAIL VS FOOD SERVICE:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	190,024	182,572	-4%	165,794	-9%
Production (\$m)	\$152.1	\$149.0	-2%	\$172.9	+16%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	21,772	12,890	-41%	12,870	>-1%
Fresh Export Value (\$m)	\$39.3	\$26.5	-33%	\$27.4	+4%
Fresh Import Volume (t)	155	-	-100%	-	-
Fresh Import Value (\$m)	\$0.2	\$-	-100%	\$-	-
Fresh Supply (t)	165,961	167,218	<1%	150,733	-10%
Fresh Supply Wholesale Value (\$m)	\$139.5	\$148.6	+6%	\$175.7	+18%
Supply per Capita (kg)	6.43	6.49	<1%	5.81	-11%
Retail Supply (t)	148,583	139,078	-6%	123,557	-11%
Retail Supply Wholesale Value (\$m)	\$123.9	\$122.2	-1%	\$143.1	+17%
Food Service Supply (t)	17,378	28,140	+62%	27,176	-3%
Food Service Wholesale Value (\$m)	\$15.6	\$26.4	+69%	\$32.6	+24%

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

FRESH MELONS INTERNATIONAL TRADE



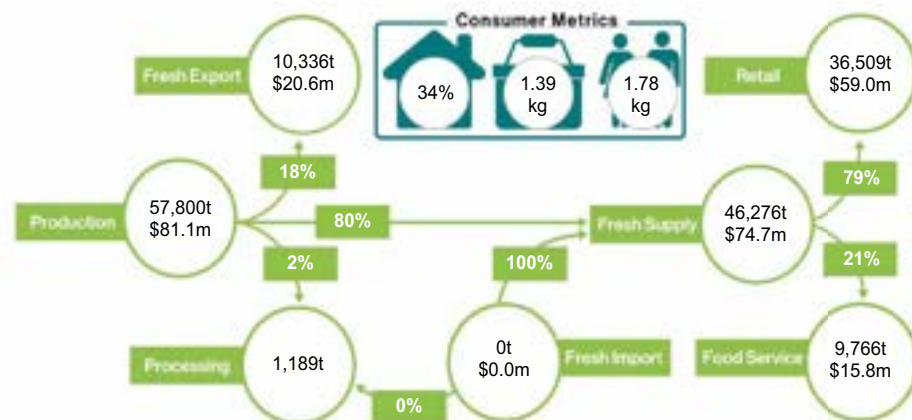


Melons - Muskmelons



Fresh Muskmelons Overview

FRESH MUSKMELONS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

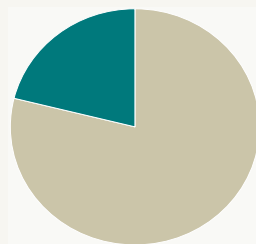
TOTAL PRODUCTION:



\$81.1M

57,800t produced and valued at **\$81.1M** with 2% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was **\$74.7M**, with **\$59M** distributed into retail and **\$15.8M** into food service.

CONSUMER METRICS:



34%

34% of Australian households purchased muskmelons, buying an average of **1.39kg** per shopping trip.

PER CAPITA CONSUMPTION:

1.78kg



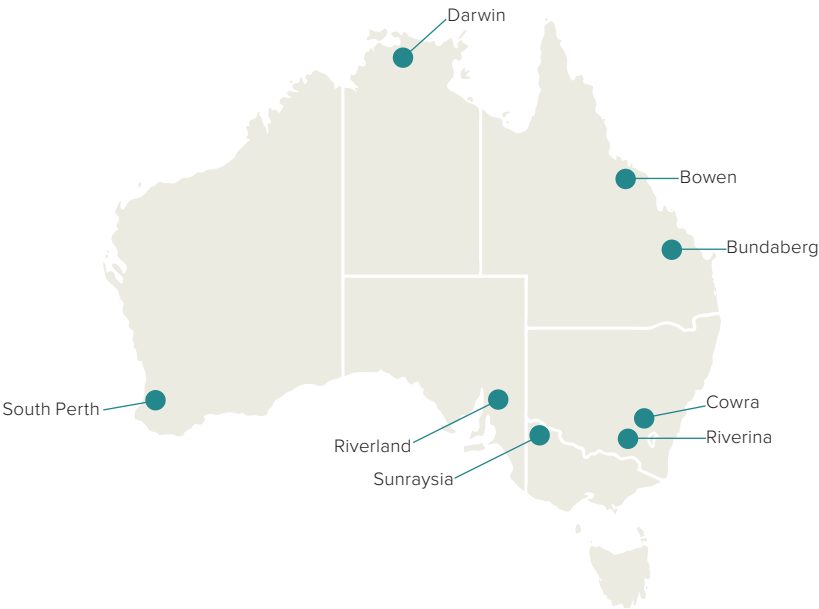
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	58,136	67,598	+16%	57,800	-14%
Production (\$m)	\$68.4	\$84.1	+23%	\$81.1	-3%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	14,887	10,806	-27%	10,336	-4%
Fresh Export Value (\$m)	\$26.2	\$21.0	-20%	\$20.6	-2%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	42,109	55,466	+32%	46,276	-17%
Fresh Supply Wholesale Value (\$m)	\$54.1	\$77.7	+44%	\$74.7	-4%
Supply per Capita (kg)	1.63	2.15	+32%	1.78	-17%
Retail Supply (t)	35,991	44,373	+23%	36,509	-18%
Retail Supply Wholesale Value (\$m)	\$46.3	\$62.2	+34%	\$59.0	-5%
Food Service Supply (t)	6,118	11,093	+81%	9,766	-12%
Food Service Wholesale Value (\$m)	\$7.9	\$15.5	+98%	\$15.8	+1%

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

Fresh Muskmelons Production

MAJOR PRODUCTION AREAS



Source: MA

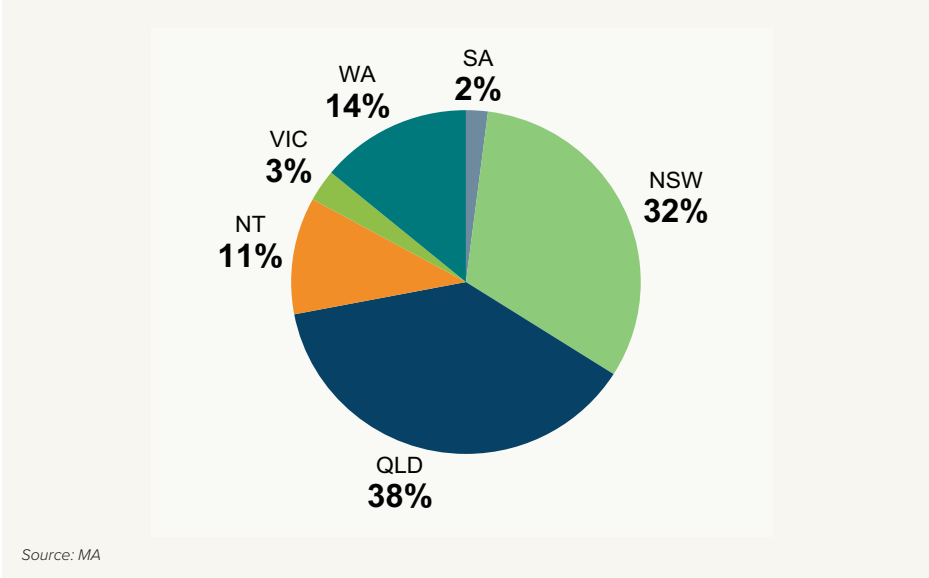
Muskmelons include **rockmelons** and **honeydew melons**. Production occurs across most states of Australia.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH MUSKMELONS PRODUCTION BY STATE



2021/22 FRESH MUSKMELONS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	21,964	\$30.8		Low	Medium	Medium	High	Medium	Low	Low		Low	Low	
New South Wales	18,496	\$26.0							Low	High	High	Medium		
Western Australia	8,092	\$11.4	Low	High	High	Low							Low	Medium
Northern Territory	6,358	\$8.9	High	High	Medium	Low	Low	Low				Low	Low	Medium
Victoria	1,734	\$2.4							Low	Medium	Medium	Low		
South Australia	1,156	\$1.6							Low	Low	Low	Low		

Availability legend: High Medium Low None

Source: MA

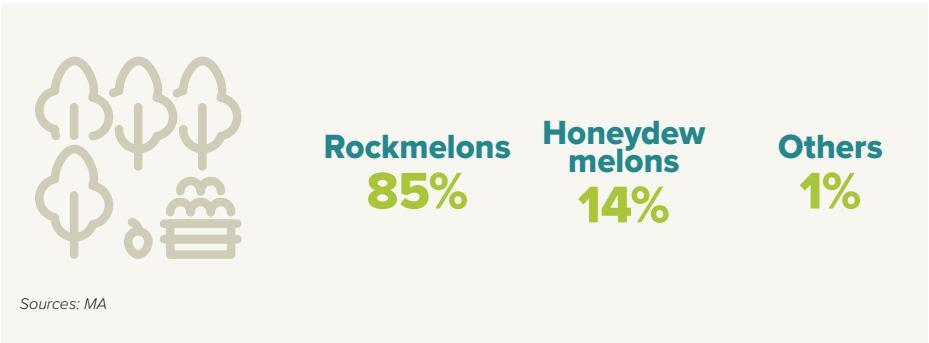
MAIN MUSKMELONS VARIETIES

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

Rockmelons, a round melon with netted greyish-green skin and an orange flesh. Rockmelons accounted for **85%** of fresh production for the year June 2022.

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

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



2021/22 FRESH MUSKMELONS SEASONALITY BY VARIETY													
Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	47,006												
Honeydew	7,742												
Piel de Sapo	553												

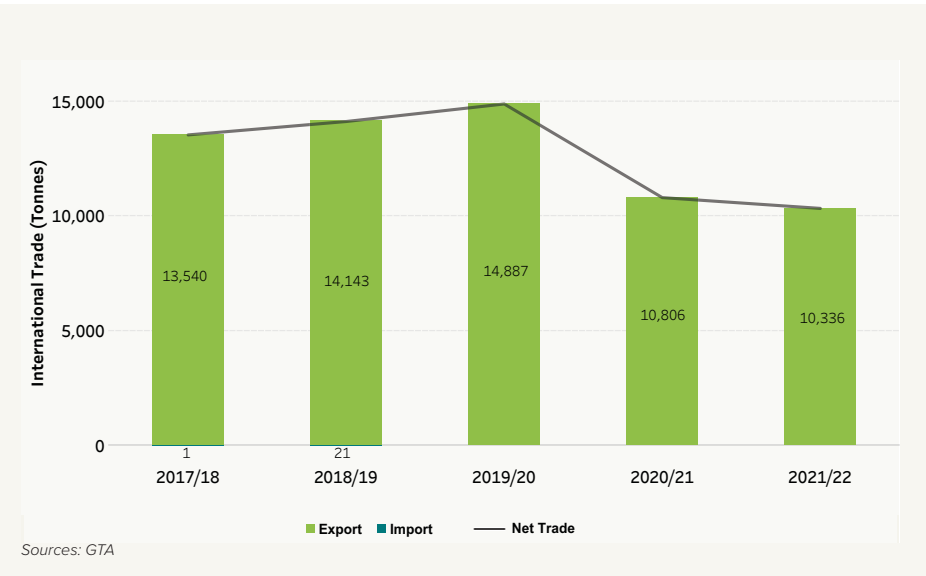
Availability legend: High Medium Low None

Sources: BA

Fresh Muskmelons International Trade

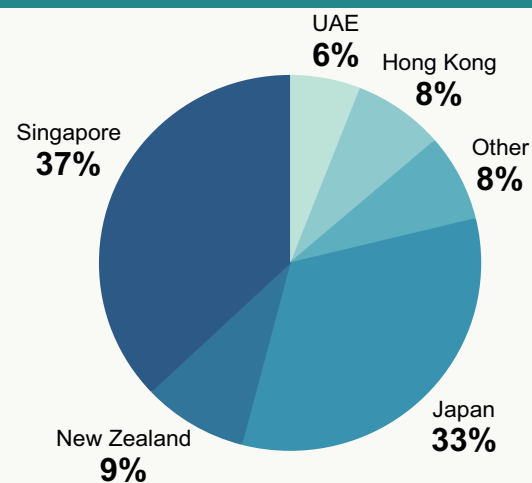
FRESH MUSKMELONS INTERNATIONAL TRADE

Australia is a net exporter of fresh muskmelons, typically exporting between **10,500-15,000 tonnes** per year. For the year ending June 2022, Australia exported **10,336 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2021/22 FRESH MUSKMELONS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **37%** of exported fresh muskmelons were sent to **Singapore**, as profiled in the chart above.

FRESH MUSKMELONS IMPORTS AND EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Queensland	7,945	5,788	5,983
New South Wales	2,628	1,794	2,532
Western Australia	3,845	2,565	1,139
Victoria	443	237	390
South Australia	13	404	202
Other	12	18	89
TOTAL	14,887	10,806	10,336

FRESH MUSKMELONS IMPORTS AND EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Singapore	5,546	4,224	3,826
Japan	3,082	4,436	3,398
New Zealand	2,289	160	920
Hong Kong	1,266	531	803
UAE	1,481	529	612
Other	1,223	926	777
TOTAL	14,887	10,806	10,336

Source: GTA

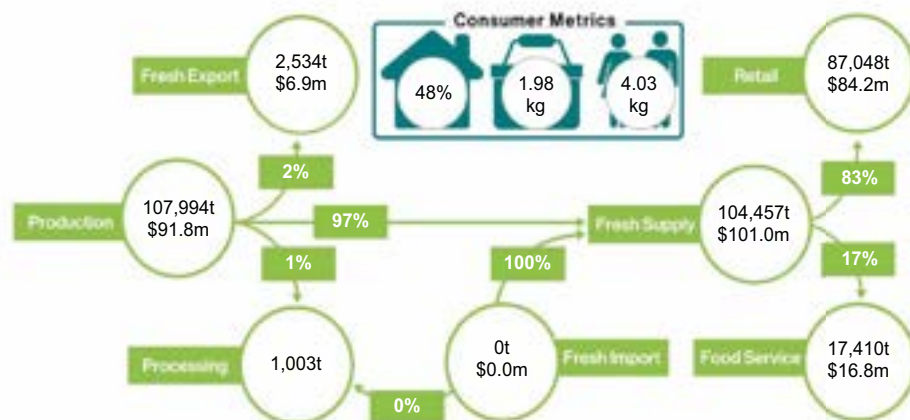
A close-up photograph of several triangular slices of watermelon. The slices are arranged in a way that creates a sense of depth, with some in sharp focus and others blurred in the background. The vibrant red flesh of the watermelon is the primary color, with some dark seeds visible. The green rind is also visible on the edges of the slices.

Melons - Watermelons



Fresh Watermelons Overview

FRESH WATERMELONS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

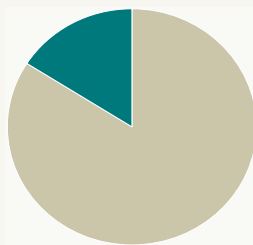
TOTAL PRODUCTION:



\$91.8M

107,994t produced and valued at **\$91.8M** with 1% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$101M**, with **\$84.2M** distributed into retail and **\$16.8M** into food service.

CONSUMER METRICS:



48%

48% of Australian households purchased watermelons, buying an average of **1.98kg** per shopping trip.

PER CAPITA CONSUMPTION:

4.03kg



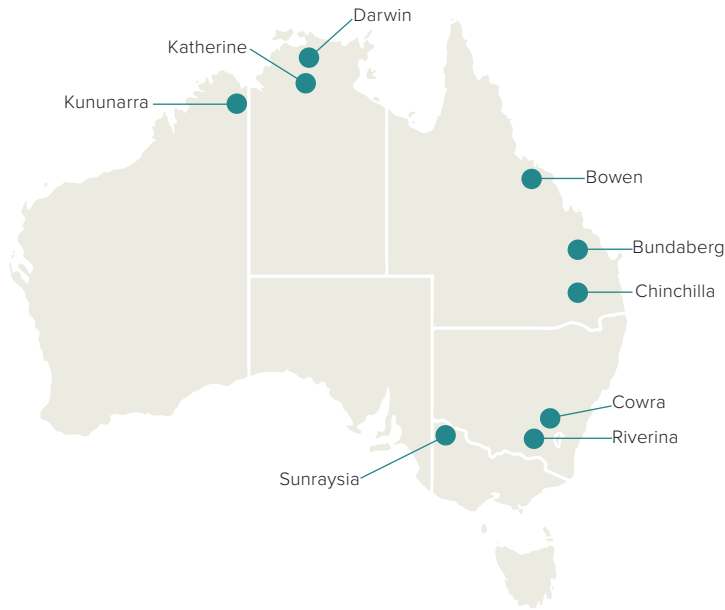
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	131,889	114,975	-13%	107,994	-6%
Production (\$m)	\$83.7	\$64.9	-22%	\$91.8	+41%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	6,885	2,084	-70%	2,534	+22%
Fresh Export Value (\$m)	\$13.1	\$5.4	-59%	\$6.9	+27%
Fresh Import Volume (t)	155	-	-100%	-	-
Fresh Import Value (\$m)	\$0.2	\$-	-100%	\$-	-
Fresh Supply (t)	123,852	111,753	-10%	104,457	-7%
Fresh Supply Wholesale Value (\$m)	\$85.4	\$70.9	-17%	\$101.0	+43%
Supply per Capita (kg)	4.80	4.34	-10%	4.03	-7%
Retail Supply (t)	112,593	94,706	-16%	87,048	-8%
Retail Supply Wholesale Value (\$m)	\$77.6	\$60.1	-23%	\$84.2	+40%
Food Service Supply (t)	11,259	17,047	+51%	17,410	+2%
Food Service Wholesale Value (\$m)	\$7.8	\$10.8	+39%	\$16.8	+56%

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

Fresh Watermelons Production

MAJOR PRODUCTION AREAS

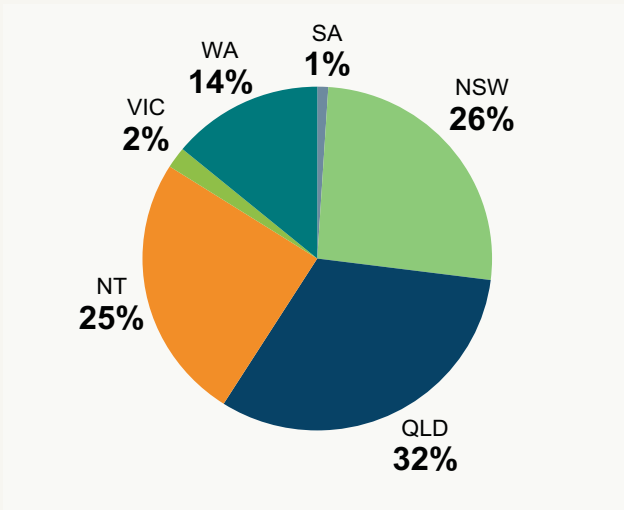


Source: MA

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



2021/22 FRESH WATERMELONS PRODUCTION BY STATE



Source: MA

2021/22 FRESH WATERMELONS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	34,558	\$29.4	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	28,078	\$23.9	None	None	None	None	None	None	High	High	High	High	High	High
Northern Territory	26,999	\$22.9	High	High	High	High	High	None	None	None	None	None	High	High
Western Australia	15,119	\$12.8	High	High	High	High	High	None	None	None	None	None	High	High
Victoria	2,160	\$1.8	None	None	None	None	High	High	High	High	High	High	High	High
South Australia	1,080	\$0.9	None	None	None	None	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

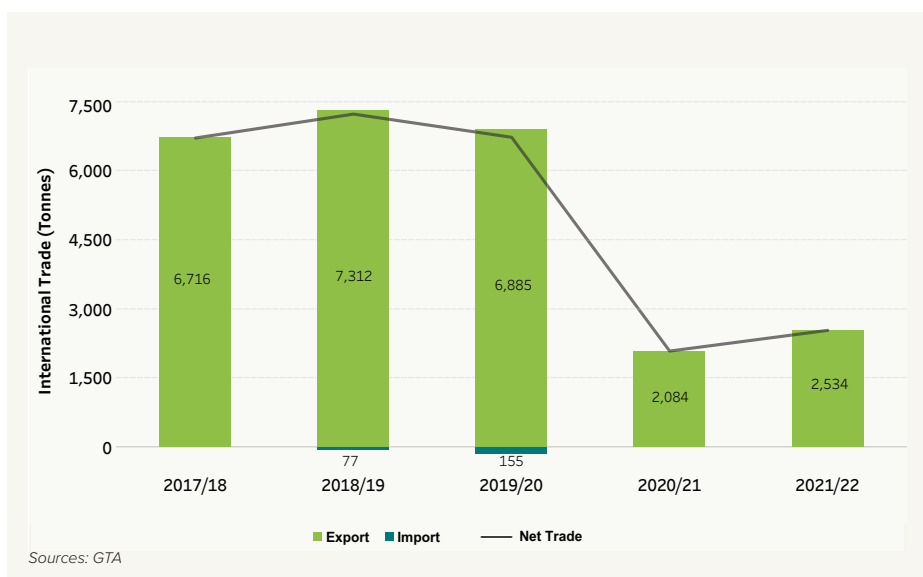
Source: MA



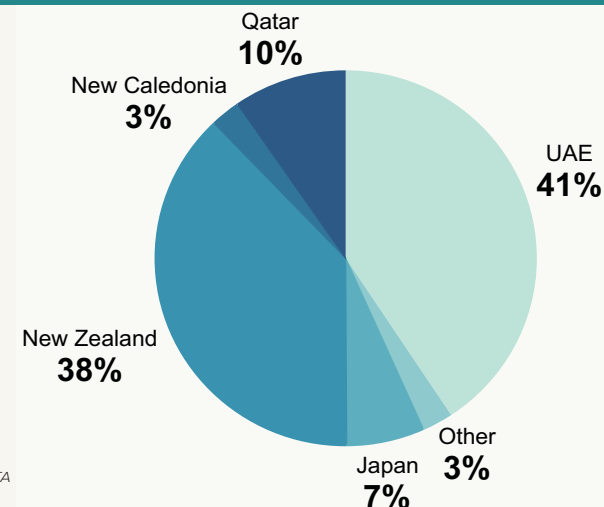
Fresh Watermelons International Trade

FRESH WATERMELONS INTERNATIONAL TRADE

Australia is a net exporter of fresh watermelons. For the year ending June 2022, Australia exported **2,534 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH WATERMELONS EXPORTS BY COUNTRY



For the year ending June 2022, **41%** of exported fresh watermelons were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

FRESH WATERMELONS IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	114	-	-	Queensland	4,571	993	1,598
Queensland	22	-	-	New South Wales	843	521	381
Victoria	19	-	-	Victoria	299	156	266
TOTAL	155	-	-	Northern Territory	279	102	150
				Western Australia	799	280	139
				Other	94	31	-
				TOTAL	6,885	2,084	2,534

FRESH WATERMELONS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Other	155	-	-	UAE	3,226	822	1,032
TOTAL	155	-	-	New Zealand	2,314	18	961
				Qatar	742	667	243
				Japan	178	255	168
				New Caledonia	5	86	65
				Other	421	236	66
				TOTAL	6,885	2,084	2,534

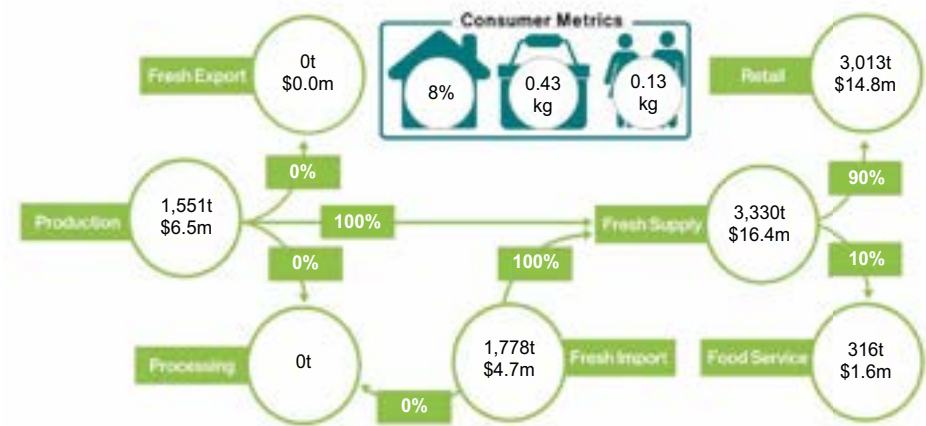
Source: GTA

Nashi



Fresh Nashi Overview

FRESH NASHI SUPPLY CHAIN – YEAR ENDING JUNE 2022

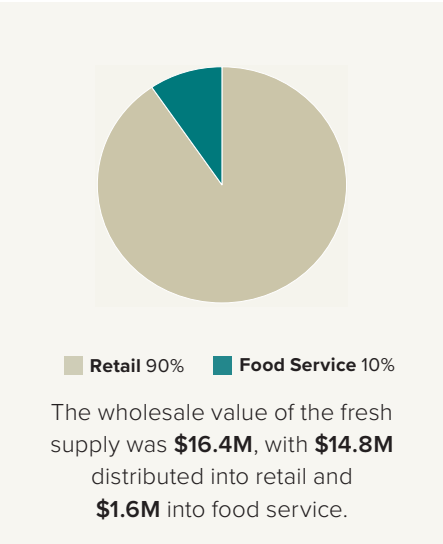


Sources: AC; Australian Nashi Grower's Association (ANGA) CFVIWA; GTA; MP & DD (Freshlogic Analysis)

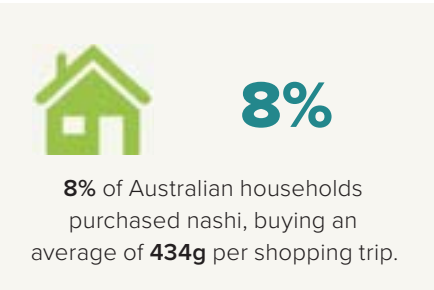
TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	877	1,100	+25%	1,551	+41%
Production (\$m)	\$3.1	\$4.5	+43%	\$6.5	+45%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	2,843	2,215	-22%	1,778	-20%
Fresh Import Value (\$m)	\$5.2	\$5.2	<1%	\$4.7	-11%
Fresh Supply (t)	3,720	3,315	-11%	3,330	<1%
Fresh Supply Wholesale Value (\$m)	\$15.7	\$15.9	+2%	\$16.4	+3%
Supply per Capita (kg)	0.14	0.13	-11%	0.13	+2%
Retail Supply (t)	3,413	3,013	-12%	3,013	-
Retail Supply Wholesale Value (\$m)	\$14.4	\$14.5	<1%	\$14.8	+3%
Food Service Supply (t)	307	301	-2%	316	+5%
Food Service Wholesale Value (\$m)	\$1.3	\$1.4	+12%	\$1.6	+8%

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

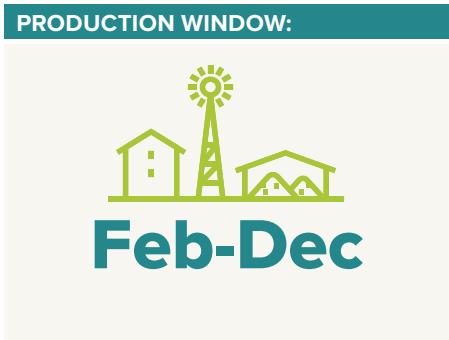
Fresh Nashi Production

MAJOR PRODUCTION AREAS

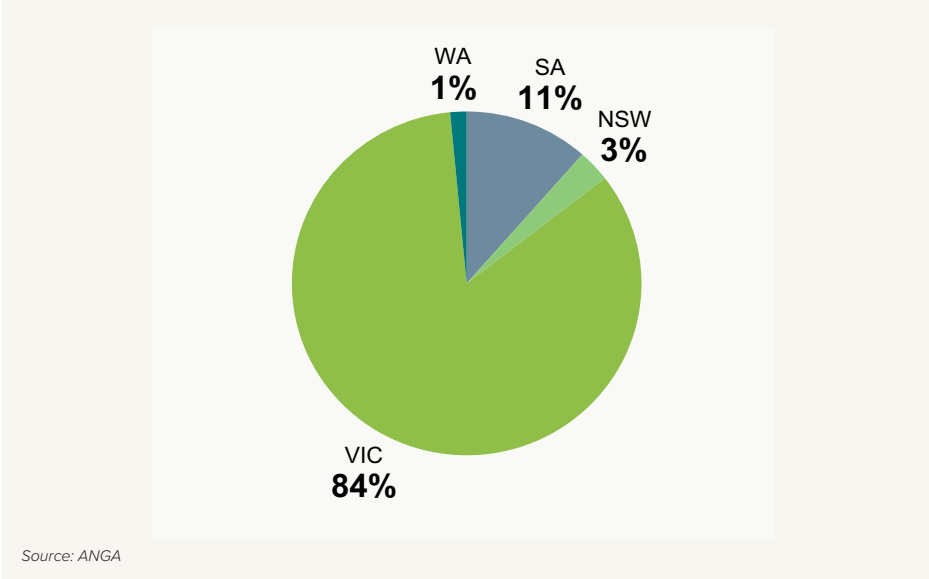


Source: ANGA

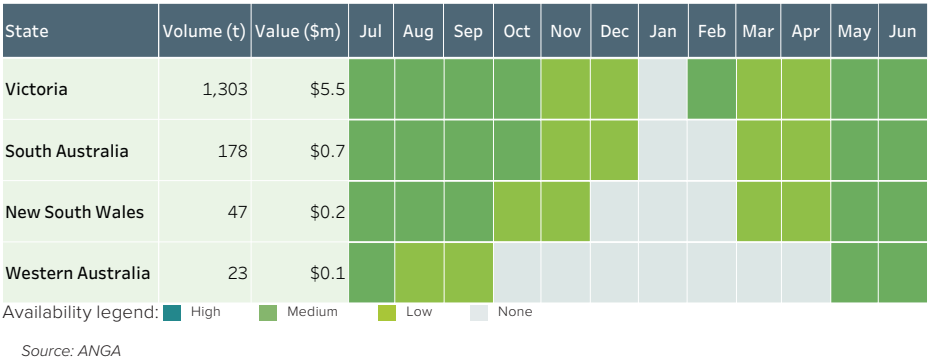
Nashi fruit, and other Asian pears as they are sometimes known, are grown predominantly in Goulburn Valley region of Victoria. Nashi fruit are all grown for the fresh market.



2021/22 FRESH NASHI PRODUCTION BY STATE



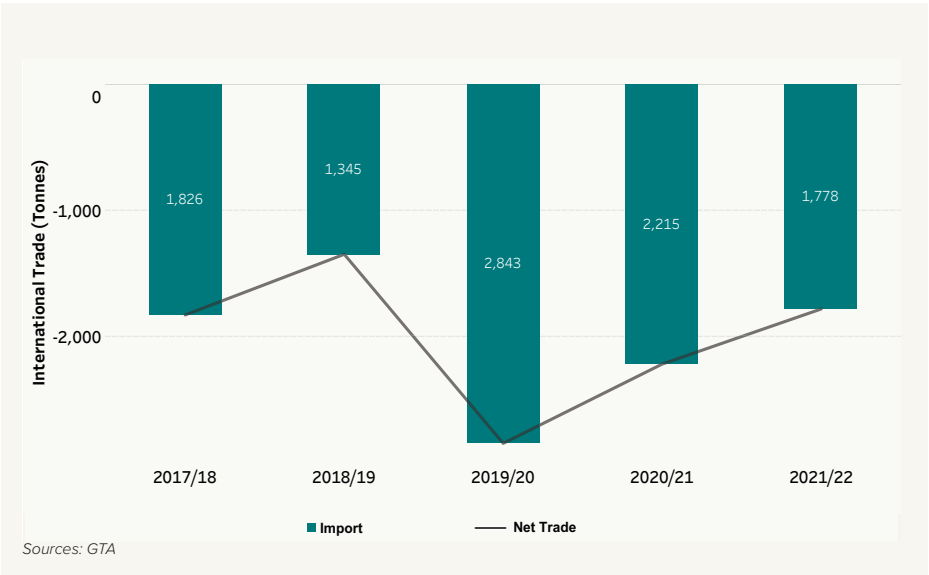
2021/22 FRESH NASHI SEASONALITY BY STATE



Fresh Nashi International Trade

FRESH NASHI INTERNATIONAL TRADE

Australia is a net importer of fresh nashi. For the year ending June 2022, Australia imported **1,778 tonnes**. The exports and imports over the last five years financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH NASHI IMPORTS BY STATE

Imports by State Destination (Tonnes)			
Year Ending June	2020	2021	2022
Victoria	1,156	1,099	819
New South Wales	1,426	868	672
Queensland	158	152	180
Western Australia	103	96	108
TOTAL	2,843	2,215	1,778

FRESH NASHI IMPORTS BY COUNTRY

Imports by Country (Tonnes)			
Year Ending June	2020	2021	2022
China	2,627	2,051	1,583
Sth. Korea	216	163	196
TOTAL	2,843	2,215	1,778

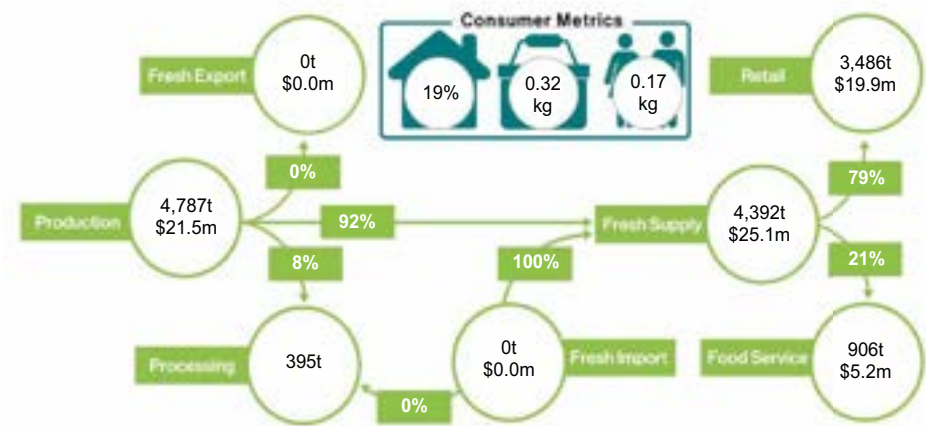
Source: GTA

Passionfruit

A close-up photograph of several passionfruits on a dark, textured surface. One fruit in the foreground is cut open, revealing its bright yellow-orange pulp and dark seeds. Other whole and partially cut fruits are visible in the background.

Fresh Passionfruit Overview

FRESH PASSIONFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2022

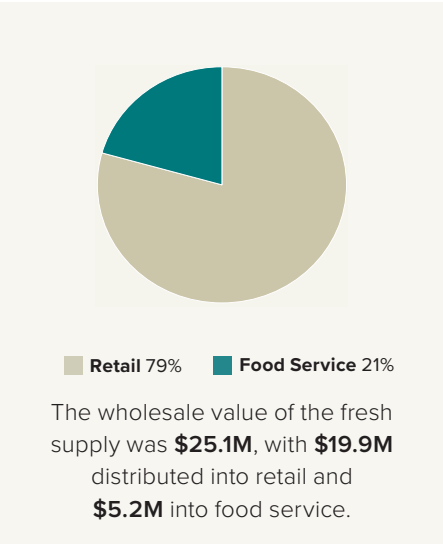


Sources: AC; CFVIWA; GTA; Passionfruit Australia Inc. (PAI); MP & DD (Freshlogic Analysis)

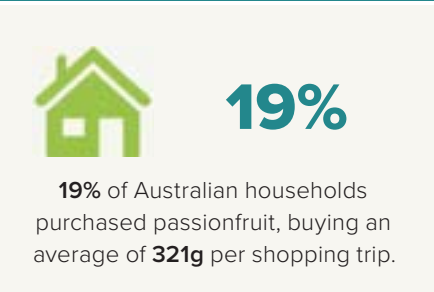
TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	4,783	5,085	+6%	4,787	-6%
Production (\$m)	\$23.6	\$24.2	+3%	\$21.5	-11%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	4,338	4,644	+7%	4,392	-5%
Fresh Supply Wholesale Value (\$m)	\$27.5	\$28.3	+3%	\$25.1	-11%
Supply per Capita (kg)	0.17	0.18	+7%	0.17	-4%
Retail Supply (t)	3,523	3,715	+5%	3,486	-6%
Retail Supply Wholesale Value (\$m)	\$22.4	\$22.6	+1%	\$19.9	-12%
Food Service Supply (t)	815	929	+14%	906	-2%
Food Service Wholesale Value (\$m)	\$5.2	\$5.7	+9%	\$5.2	-9%

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

Fresh Passionfruit Production

MAJOR PRODUCTION AREAS



Source: PAI

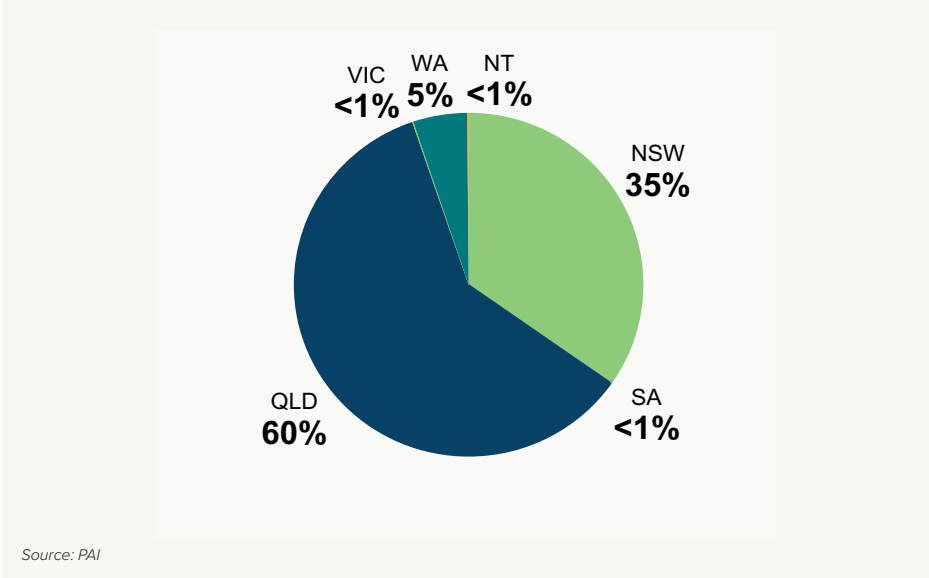
Passionfruit is grown in the north of Australia, with the majority grown in Queensland. The majority of Australian production is destined for the fresh market.

PRODUCTION WINDOW:



Year-round

2021/22 FRESH PASSIONFRUIT PRODUCTION BY STATE



2021/22 FRESH PASSIONFRUIT SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	2,874	\$12.9	Medium	Medium	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium
New South Wales	1,659	\$7.4	Medium	Medium	Low	Low	Low	Low	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	239	\$1.1	Medium	Medium	None	None	None	None	None	None	None	Low	Low	Low
Victoria	5	\$0.0	Medium	Medium	None	None	None	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	5	\$0.0	Medium	Medium	None	None	None	None	None	None	None	None	Medium	Medium

Availability legend: High Medium Low None

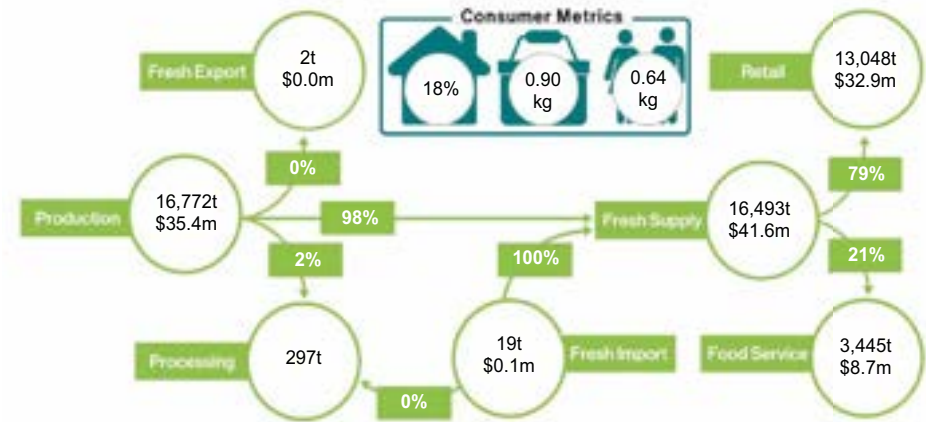
Source: PAI



Papaya/ Pawpaw

Fresh Papaya/Pawpaw Overview

FRESH PAPAYA/PAWPAW SUPPLY CHAIN – YEAR ENDING JUNE 2022

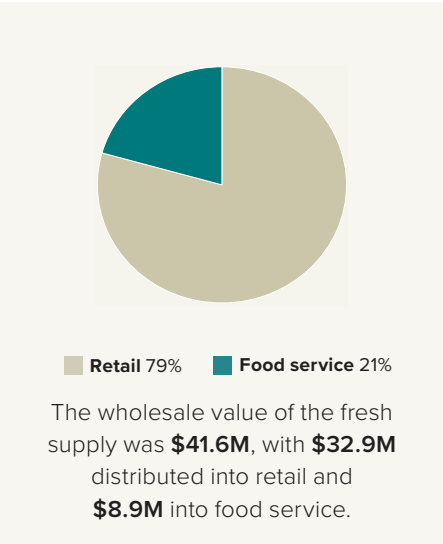


Sources: AC; CFVIWA; GTA; Papaya Australia (PA); MP & DD (Freshlogic Analysis)

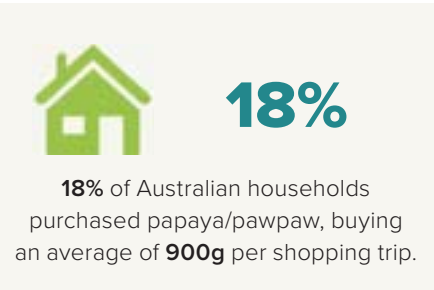
TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	19,648	18,330	-7%	16,772	-8%
Production (\$m)	\$31.8	\$40.7	+28%	\$35.4	-13%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	10	5	-48%	2	-60%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	+18%	< \$0.1	+39%
Fresh Import Volume (t)	86	20	-77%	19	-5%
Fresh Import Value (\$m)	\$0.4	\$0.1	-69%	\$0.1	+6%
Fresh Supply (t)	19,452	18,092	-7%	16,493	-9%
Fresh Supply Wholesale Value (\$m)	\$37.5	\$47.9	+28%	\$41.6	-13%
Supply per Capita (kg)	0.75	0.70	-7%	0.64	-10%
Retail Supply (t)	15,438	14,359	-7%	13,048	-9%
Retail Supply Wholesale Value (\$m)	\$29.7	\$38.0	+28%	\$32.9	-13%
Food Service Supply (t)	4,014	3,733	-7%	3,445	-8%
Food Service Wholesale Value (\$m)	\$7.7	\$9.9	+28%	\$8.7	-12%

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



Fresh Papaya/Pawpaw Production

MAJOR PRODUCTION AREAS



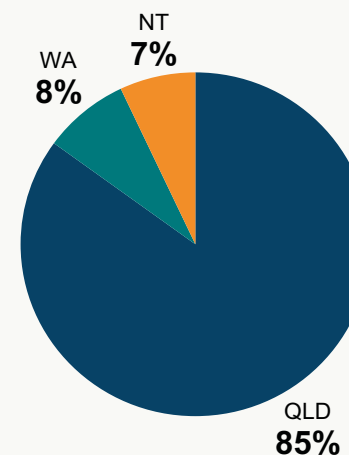
Source: PA

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

PRODUCTION WINDOW:



2021/22 FRESH PAPAYA/PAWPAW PRODUCTION BY STATE



Source: PA

2021/22 FRESH PAPAYA/PAWPAW SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	14,257	\$30.1	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High	High
Western Australia	1,342	\$2.8	Low	None	None	None	None	None	Low	Low	Low	Low	Low	Low
Northern Territory	1,174	\$2.5	Low	None	None	None	None	None	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Source: PA



MAIN PAPAYA/PAWPAW CATEGORIES

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

Red Papaya, accounted for **85%** of fresh production.

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



Red Papaya
85%

**Yellow
Pawpaw**
15%

Sources: BA

2021/22 FRESH PAPAYA/PAWPAW SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Papaya	14,257	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Pawpaw	2,516	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

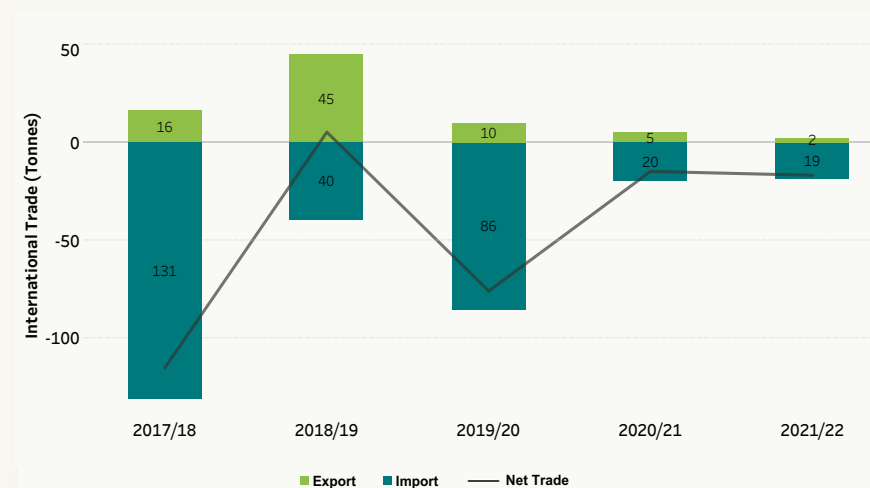
Availability legend: ■ High ■ Medium ■ Low ■ None

Sources: PA

Fresh Papaya/Pawpaw International Trade

FRESH PAPAYA/PAWPAW INTERNATIONAL TRADE

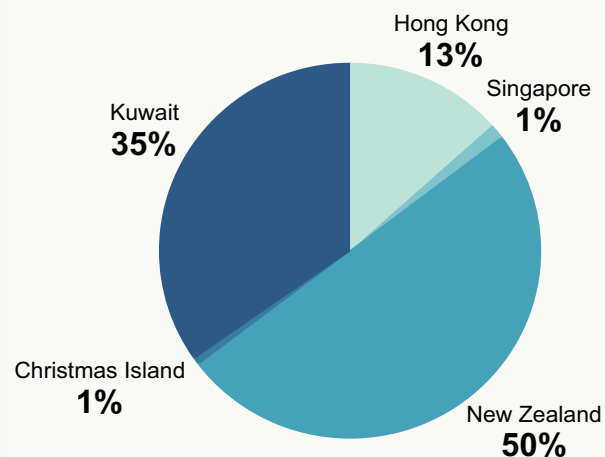
Australia is a net importer of fresh red papaya and yellow pawpaw, typically importing between **20-130 tonnes** per year. For the year ending June 2022, Australia imported **19 tonnes**. The export and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH PAPAYA/PAWPAW EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **50%** of exported fresh papaya/pawpaw were sent to **New Zealand**, as profiled in the chart above.

FRESH PAPAYA/PAWPAW IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Victoria	85	19	19	Queensland	2	3	1
New South Wales	-	1	-	Victoria	4	< 0.5	1
Western Australia	< 0.5	-	-	New South Wales	3	2	< 0.5
Other	< 0.5	-	-	Northern Territory	-	< 0.5	< 0.5
TOTAL	86	20	19	Other	-	< 0.5	< 0.5
				TOTAL	10	5	2

FRESH PAPAYA/PAWPAW IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Fiji	85	19	19	New Zealand	-	1	1
Vietnam	-	1	-	Kuwait	-	< 0.5	1
Sri Lanka	-	< 0.5	-	Hong Kong	< 0.5	1	< 0.5
Philippines	< 0.5	-	-	Singapore	4	2	< 0.5
Other	< 0.5	< 0.5	-	Christmas Island	-	< 0.5	< 0.5
TOTAL	86	20	19	Other	6	1	< 0.5
				TOTAL	10	5	2

Source: GTA

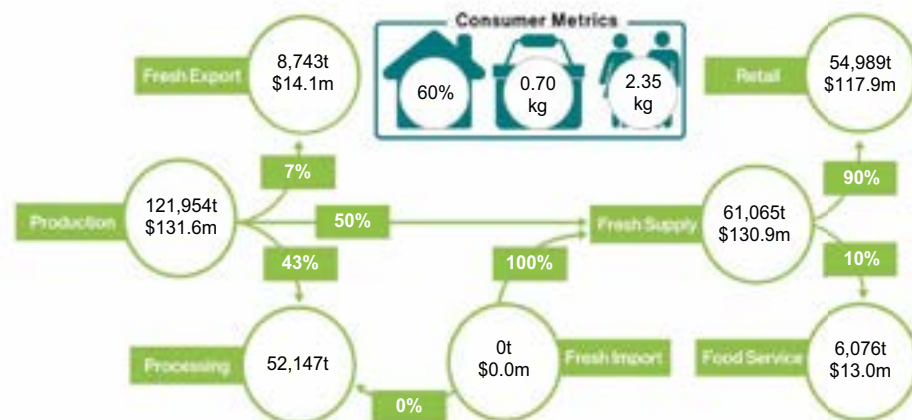
Pears





Fresh Pears Overview

FRESH PEARS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

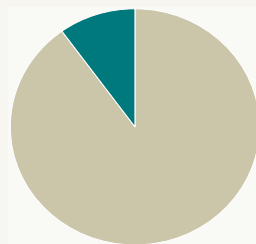
TOTAL PRODUCTION:



\$131.6M

121,954t produced and valued at **\$131.6M** with 43% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 90% ■ Food Service 10%

The wholesale value of the fresh supply was **\$130.9M**, with **\$117.9M** distributed into retail and **\$13M** into food service.

CONSUMER METRICS:



60%

60% of Australian households purchased pears, buying an average of **697g** per shopping trip.

PER CAPITA CONSUMPTION:

2.35kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	118,689	124,338	+5%	121,954	-2%
Production (\$m)	\$130.2	\$140.4	+8%	\$131.6	-6%
Production Trees (000 Trees)	1,354	1,354	-	1,354	-
Fresh Export Volume (t)	9,732	8,229	-15%	8,743	+6%
Fresh Export Value (\$m)	\$16.1	\$13.5	-16%	\$14.1	+4%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	62,424	62,943	<1%	61,065	-3%
Fresh Supply Wholesale Value (\$m)	\$128.5	\$141.1	+10%	\$130.9	-7%
Supply per Capita (kg)	2.42	2.44	+1%	2.35	-4%
Retail Supply (t)	57,008	56,706	>-1%	54,989	-3%
Retail Supply Wholesale Value (\$m)	\$117.4	\$127.1	+8%	\$117.9	-7%
Food Service Supply (t)	5,416	6,238	+15%	6,076	-3%
Food Service Wholesale Value (\$m)	\$11.2	\$14.0	+25%	\$13.0	-7%

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

Fresh Pears Production

MAJOR PRODUCTION AREAS



Source: APAL

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

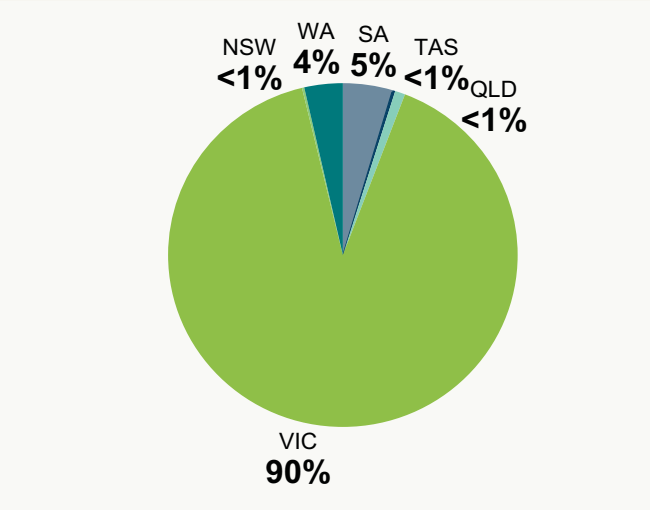
PRODUCTION TREES:



PRODUCTION WINDOW:



2021/22 FRESH PEARS PRODUCTION BY STATE



Source: APAL

2021/22 FRESH PEARS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	110,351	\$119.1	High	High	High	High	High	High	Medium	High	High	High	High	High
South Australia	5,568	\$6.0	High	High	High	High	Medium	Medium	Medium	Medium	High	High	High	High
Western Australia	4,311	\$4.7	High	High	High	High	Medium	Medium	Medium	High	High	High	High	High
Tasmania	1,149	\$1.2	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High
Queensland	332	\$0.4	High	High	High	High	Medium	Medium	Medium	High	High	High	High	High
New South Wales	243	\$0.3	High	High	High	High	Medium	Medium	Medium	High	High	High	High	High

Availability legend: High Medium Low None

Source: APAL; GTA



MAIN PEARS VARIETIES

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

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

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

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

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



Sources: APAL

Packham
63%

Williams
20%

Beurré Bosc
10%

Corella
1%

2021/22 FRESH PEARS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	44,185	High	High	High	High	High	High	High	High	High	High	High	High
William	14,027	None	None	None	None	None	None	None	None	None	None	None	None
Beurre Bosc	7,013	High	High	High	High	High	High	High	High	High	High	High	High
Corella	701	High	High	High	High	High	High	High	High	High	High	High	High
Others	4,208	High	High	High	High	High	High	High	High	High	High	High	High

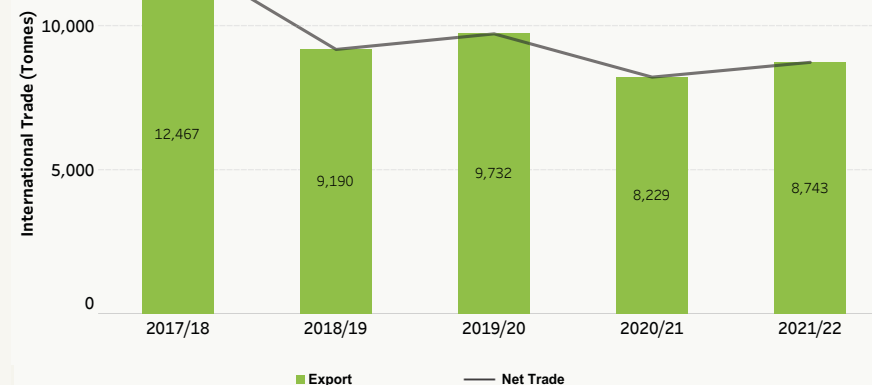
Availability legend: High Medium Low None

Sources: APAL

Fresh Pears International Trade

FRESH PEARS INTERNATIONAL TRADE

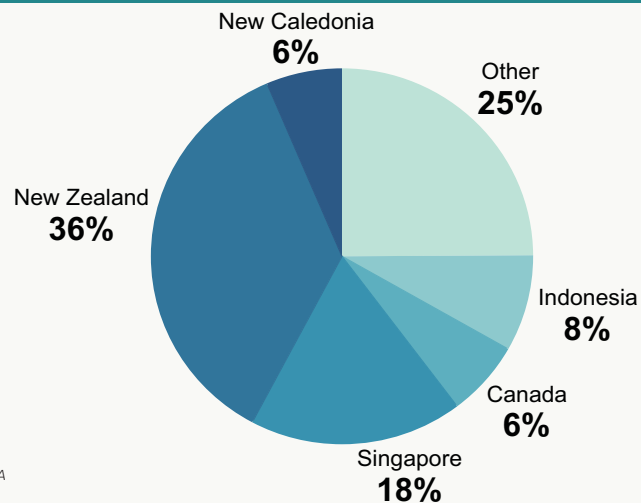
For the year ending June 2022, Australia exported **8,743 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH PEARS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **36%** of exported fresh pears were sent to **New Zealand**, as profiled in the chart above.

FRESH PEARS EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Victoria	9,361	7,935	8,427
New South Wales	160	146	163
Queensland	172	118	126
Western Australia	26	24	14
Tasmania	-	< 0.5	13
Other	13	6	< 0.5
TOTAL	9,732	8,229	8,743

FRESH PEARS EXPORTS BY COUNTRY

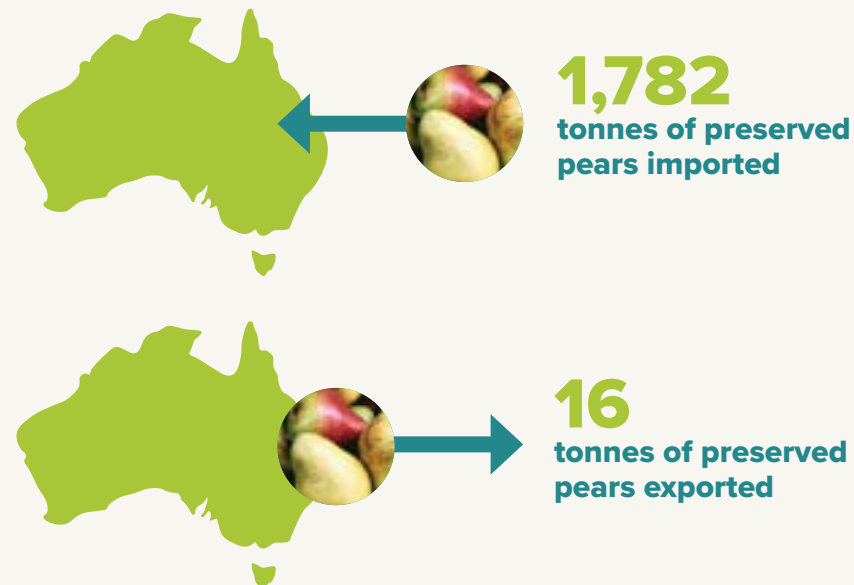
Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
New Zealand	3,190	2,917	3,129
Singapore	1,533	942	1,580
Indonesia	1,694	757	727
Canada	900	1,146	567
New Caledonia	601	520	561
Other	1,814	1,947	2,178
TOTAL	9,732	8,229	8,743

Source: GTA

Processed Pears International Trade

2021/22 PROCESSED PEARS INTERNATIONAL TRADE

For the year ending June 2022, an additional **1,782 tonnes** of preserved pears were imported, while **16 tonnes** was exported.



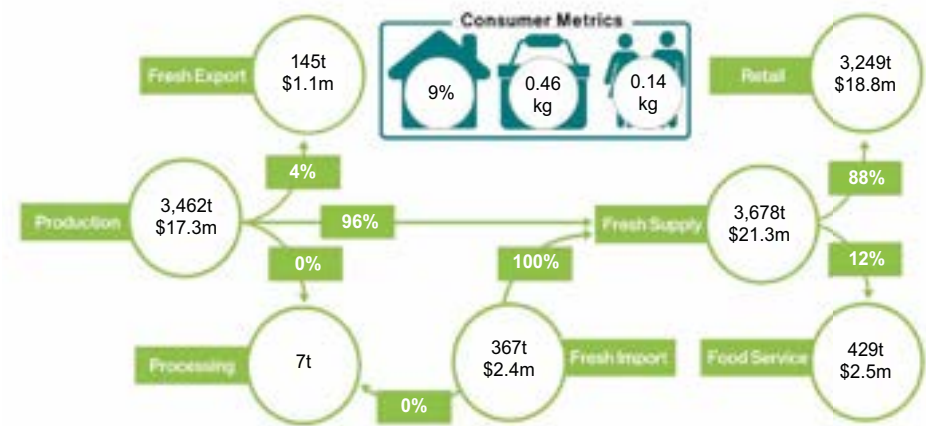
Source: GTA

Persimmons



Fresh Persimmons Overview

FRESH PERSIMMONS SUPPLY CHAIN – YEAR ENDING JUNE 2022

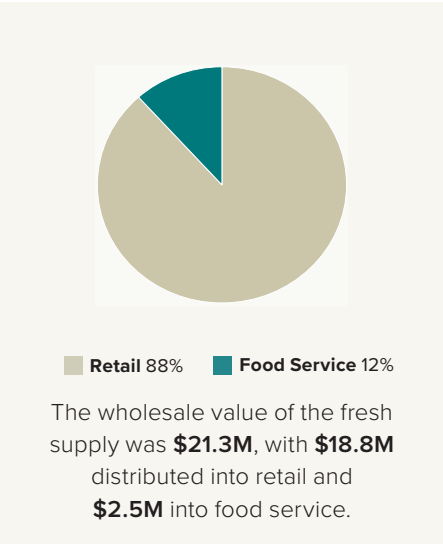


Sources: AC; CFVIWA; Persimmons Australia Inc. (PAus); GTA; MP & DD (Freshlogic Analysis)

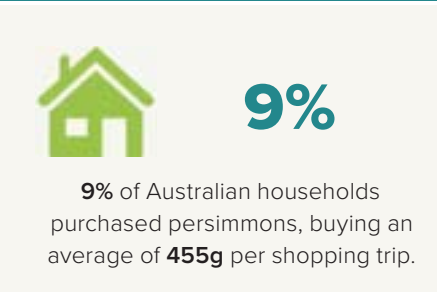
TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:



YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	2,771	2,767	>-1%	3,462	+25%
Production (\$m)	\$11.0	\$11.1	<1%	\$17.3	+56%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	140	179	+28%	145	-19%
Fresh Export Value (\$m)	\$1.0	\$1.4	+42%	\$1.1	-23%
Fresh Import Volume (t)	602	325	-46%	367	+13%
Fresh Import Value (\$m)	\$3.3	\$2.2	-34%	\$2.4	+12%
Fresh Supply (t)	3,227	2,908	-10%	3,678	+26%
Fresh Supply Wholesale Value (\$m)	\$14.6	\$13.0	-11%	\$21.3	+64%
Supply per Capita (kg)	0.13	0.11	-10%	0.14	+25%
Retail Supply (t)	2,905	2,574	-11%	3,249	+26%
Retail Supply Wholesale Value (\$m)	\$13.2	\$11.5	-12%	\$18.8	+63%
Food Service Supply (t)	323	335	+4%	429	+28%
Food Service Wholesale Value (\$m)	\$1.5	\$1.5	+3%	\$2.5	+66%

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

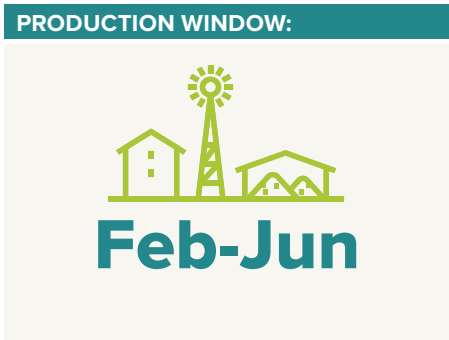
Fresh Persimmons Production

MAJOR PRODUCTION AREAS

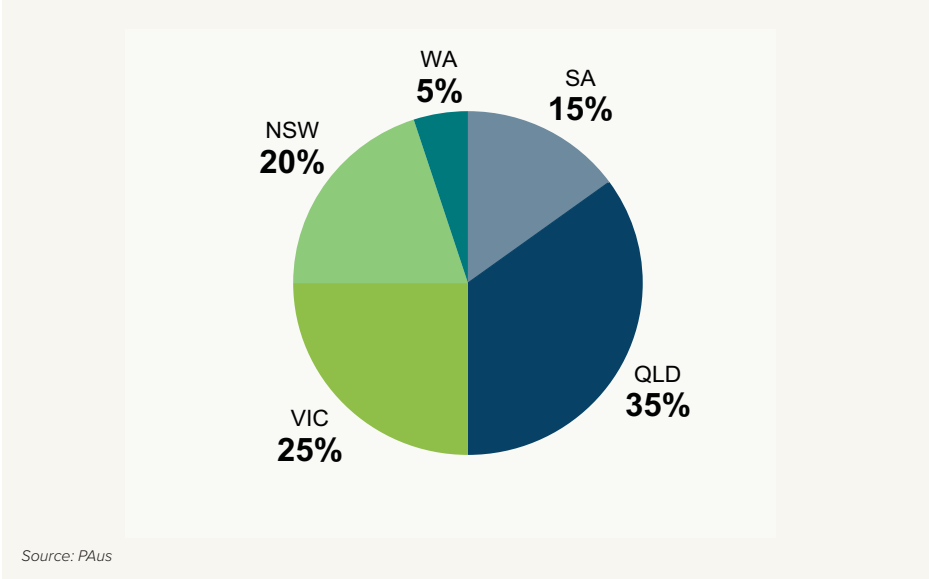


Source: PAus

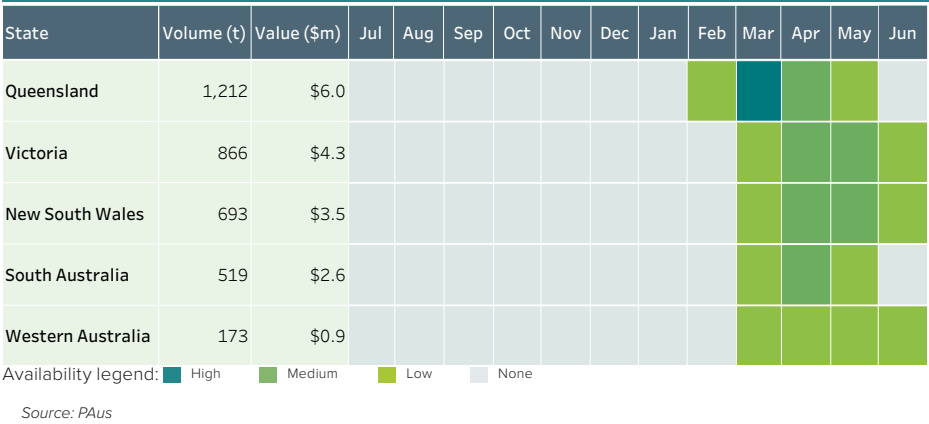
Persimmons are grown around Australia in various states. There is a small export crop, but the majority of production is used in the fresh market.



2021/22 FRESH PERSIMMONS PRODUCTION BY STATE



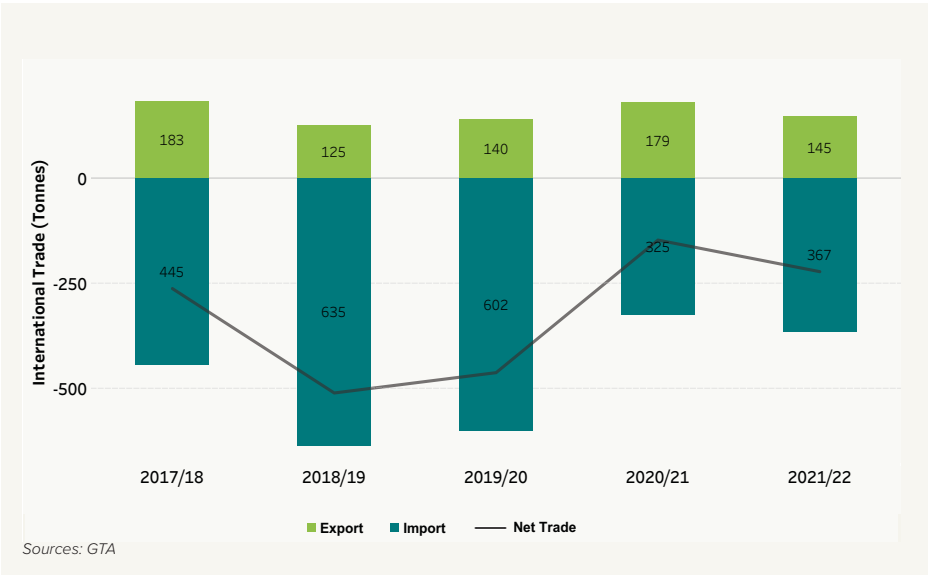
2021/22 FRESH PERSIMMONS SEASONALITY BY STATE



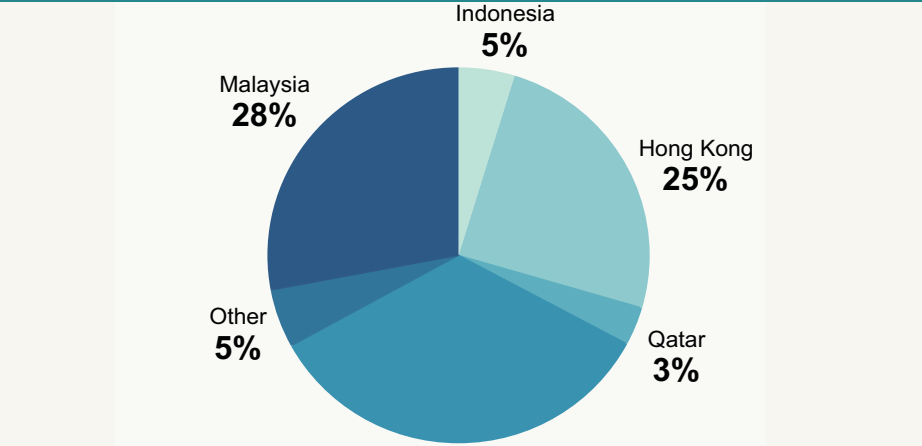
Fresh Persimmons International Trade

FRESH PERSIMMONS INTERNATIONAL TRADE

There is a small amount of international trade of persimmons, typically with more imports than exports. For the year ending 2022, Australia exported **145 tonnes**. The export and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH PERSIMMONS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **34%** of exported fresh persimmons were sent to **Singapore**, as profiled in the chart above.

FRESH PERSIMMONS IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	465	264	310	South Australia	45	78	74
Western Australia	42	55	41	Victoria	45	41	51
Victoria	82	6	16	New South Wales	16	11	10
Queensland	12	-	-	Queensland	32	47	8
TOTAL	602	325	367	Western Australia	1	-	2
				Other	1	2	< 0.5
				TOTAL	140	179	145

FRESH PERSIMMONS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New Zealand	601	321	367	Singapore	52	67	50
Sth. Korea	-	4	-	Malaysia	42	63	41
Japan	1	-	-	Hong Kong	23	22	36
TOTAL	602	325	367	Indonesia	2	5	7
				Qatar	11	9	5
				Other	9	12	7
				TOTAL	140	179	145

Source: GTA

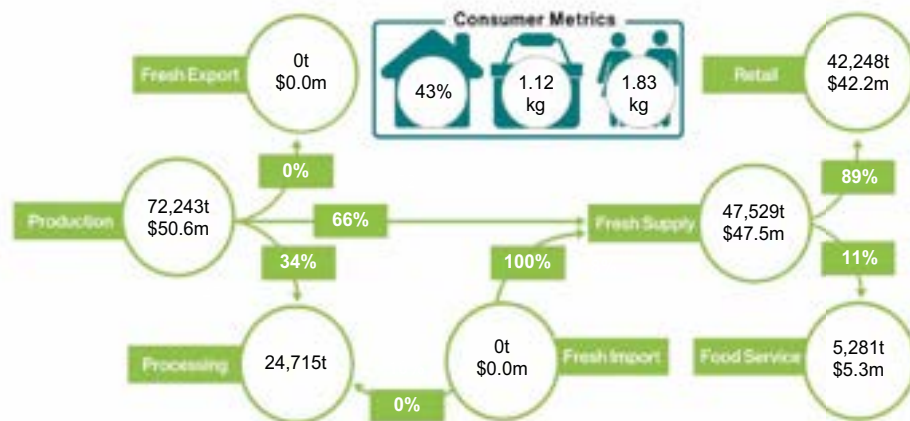
Pineapples





Fresh Pineapples Overview

FRESH PINEAPPLES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

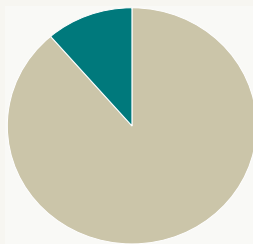
TOTAL PRODUCTION:



\$50.6M

72,243t produced and valued at **\$50.6M** with 34% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 89% ■ Food Service 11%

The wholesale value of the fresh supply was **\$47.5M**, with **\$42.2M** distributed into retail and **\$5.3M** into food service.

CONSUMER METRICS:



43%

43% of Australian households purchased pineapples, buying an average of **1,118g** per shopping trip.

PER CAPITA CONSUMPTION:

1.83kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	66,069	71,084	+8%	72,243	+2%
Production (\$m)	\$52.2	\$46.8	-10%	\$50.6	+8%
Production area (Ha)	2,039	2,170	+6%	2,170	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	42,352	46,920	+11%	47,529	+1%
Fresh Supply Wholesale Value (\$m)	\$48.2	\$44.0	-9%	\$47.5	+8%
Supply per Capita (kg)	1.64	1.82	+11%	1.83	<1%
Retail Supply (t)	37,315	41,303	+11%	42,248	+2%
Retail Supply Wholesale Value (\$m)	\$42.5	\$38.7	-9%	\$42.2	+9%
Food Service Supply (t)	5,037	5,617	+12%	5,281	-6%
Food Service Wholesale Value (\$m)	\$5.7	\$5.3	-8%	\$5.3	<1%

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

Fresh Pineapples Production

MAJOR PRODUCTION AREAS



Source: QDAF

The majority of pineapple production occurs in Queensland. **34%** of pineapples grown in Australia in 2022 were sent to be processed, with the majority of this volume either tinned or juiced.

PRODUCTION AREA:



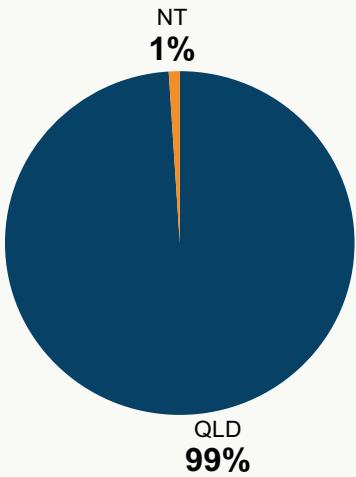
2,170
Ha

PRODUCTION WINDOW:



Year-round

2021/22 FRESH PINEAPPLES PRODUCTION BY STATE



Source: QDAF

2021/22 FRESH PINEAPPLES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	71,522	\$50.1	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	722	\$0.5	None	None	None	None	None	None	None	None	None	None	None	None

Availability legend: High Medium Low None

Source: Freshlogic Analysis; QDAF



Processed Pineapples International Trade

2021/22 PROCESSED PINEAPPLES INTERNATIONAL TRADE

For the year ending June 2022, an additional **24,417 tonnes** of preserved pineapples were imported, while **112 tonnes** were exported. Australia also imported **4,399 kilolitres** of pineapple juice, while exporting **410 kilolitres** of pineapple juice.



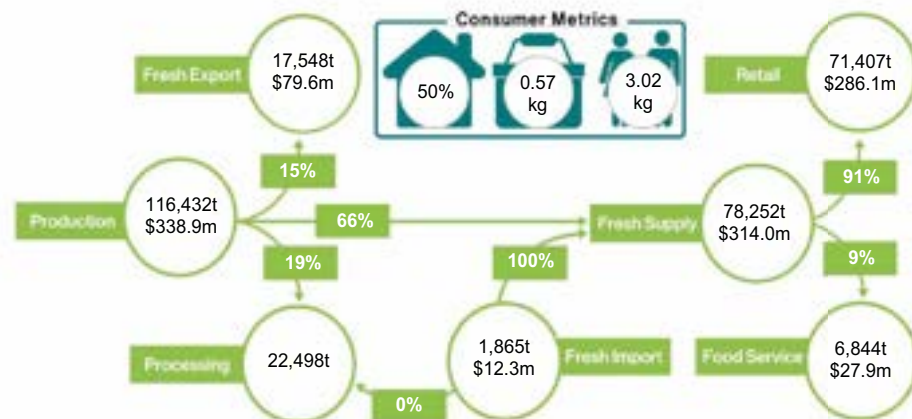


Summerfruit - Overview



Fresh Summerfruit Overview

FRESH SUMMERFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

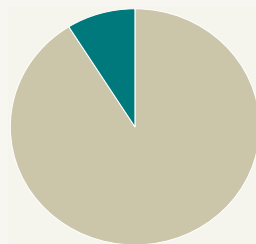
TOTAL PRODUCTION:



\$338.9M

116,432t produced and valued at **\$338.9M** with **19%** sent to be processed.

RETAIL VS FOOD SERVICE:



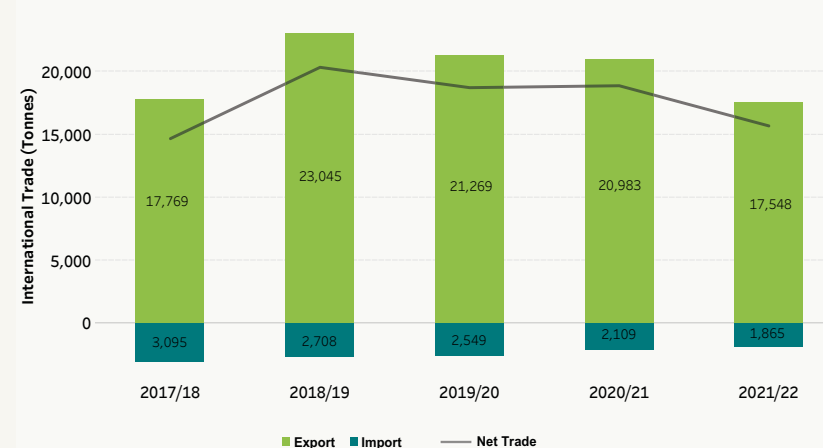
■ Retail 91% ■ Food Service 9%

The wholesale value of the fresh supply was **\$314M**, with **\$286.1M** distributed into retail and **\$27.9M** into food service.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	137,717	124,878	-9%	116,432	-7%
Production (\$m)	\$413.9	\$338.9	-18%	\$338.9	>-1%
Production area (Ha)	5,708	-	-	-	-
Fresh Export Volume (t)	21,269	20,983	-1%	17,548	-16%
Fresh Export Value (\$m)	\$89.1	\$92.1	+3%	\$79.6	-14%
Fresh Import Volume (t)	2,549	2,109	-17%	1,865	-12%
Fresh Import Value (\$m)	\$14.1	\$12.8	-9%	\$12.3	-4%
Fresh Supply (t)	92,448	81,723	-12%	78,252	-4%
Fresh Supply Wholesale Value (\$m)	\$394.8	\$301.7	-24%	\$314.0	+4%
Supply per Capita (kg)	3.58	3.17	-11%	3.02	-5%
Retail Supply (t)	84,369	74,616	-12%	71,407	-4%
Retail Supply Wholesale Value (\$m)	\$359.8	\$274.7	-24%	\$286.1	+4%
Food Service Supply (t)	8,079	7,107	-12%	6,844	-4%
Food Service Wholesale Value (\$m)	\$35.0	\$27.0	-23%	\$27.9	+3%

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

FRESH SUMMERFRUIT INTERNATIONAL TRADE



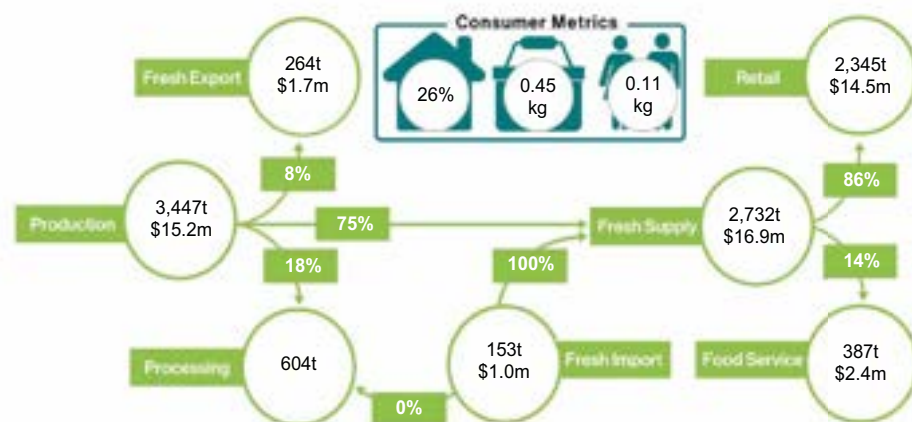


Summerfruit - Apricots



Fresh Apricots Overview

FRESH APRICOTS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

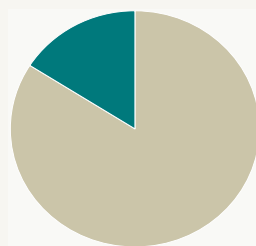
TOTAL PRODUCTION:



\$15.2M

3,447t produced and valued at **\$15.2M** with 18% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was **\$16.9M**, with **\$14.5M** distributed into retail and **\$2.4M** into food service.

CONSUMER METRICS:



26%

26% of Australian households purchased apricots, buying an average of **445g** per shopping trip.

PER CAPITA CONSUMPTION:

0.11kg



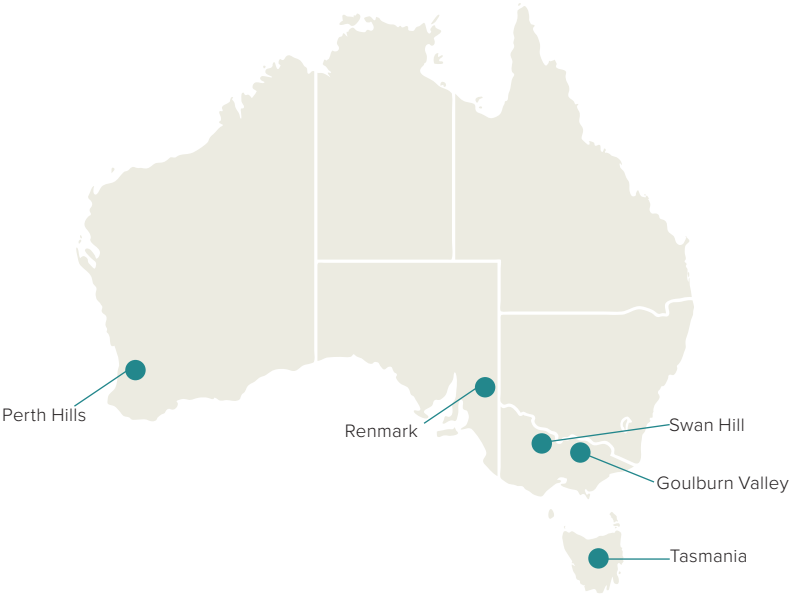
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	7,275	6,136	-16%	3,447	-44%
Production (\$m)	\$29.4	\$25.3	-14%	\$15.2	-40%
Production area (Ha)	587	-	-	-	-
Fresh Export Volume (t)	885	414	-53%	264	-36%
Fresh Export Value (\$m)	\$4.1	\$2.4	-43%	\$1.7	-30%
Fresh Import Volume (t)	484	122	-75%	153	+25%
Fresh Import Value (\$m)	\$2.6	\$0.7	-74%	\$1.0	+46%
Fresh Supply (t)	5,599	4,769	-15%	2,732	-43%
Fresh Supply Wholesale Value (\$m)	\$32.6	\$27.6	-15%	\$16.9	-39%
Supply per Capita (kg)	0.22	0.19	-15%	0.11	-43%
Retail Supply (t)	4,827	4,111	-15%	2,345	-43%
Retail Supply Wholesale Value (\$m)	\$28.1	\$23.8	-15%	\$14.5	-39%
Food Service Supply (t)	772	658	-15%	387	-41%
Food Service Wholesale Value (\$m)	\$4.5	\$3.8	-15%	\$2.4	-37%

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

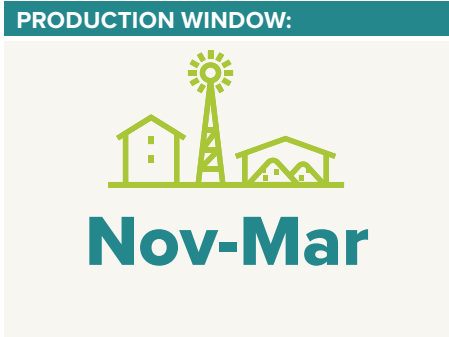
Fresh Apricots Production

MAJOR PRODUCTION AREAS

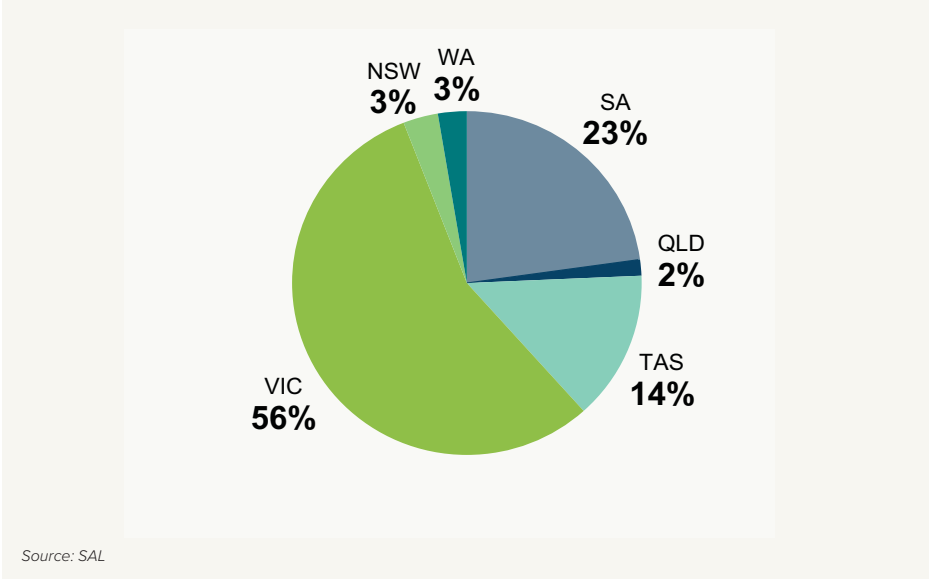


Source: SAL

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



2021/22 FRESH APRICOTS PRODUCTION BY STATE



2021/22 FRESH APRICOTS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,922	\$8.5					High	High	High	High	Medium			
South Australia	786	\$3.5					High	High	Medium	Medium				
Tasmania	484	\$2.1					Medium	Medium	Medium	Medium				
New South Wales	112	\$0.5					Medium	Medium	High	Medium				
Western Australia	91	\$0.4					Medium	Medium	High	Medium				
Queensland	52	\$0.2					Medium	Medium	Medium	Medium				

Availability legend: High Medium Low None

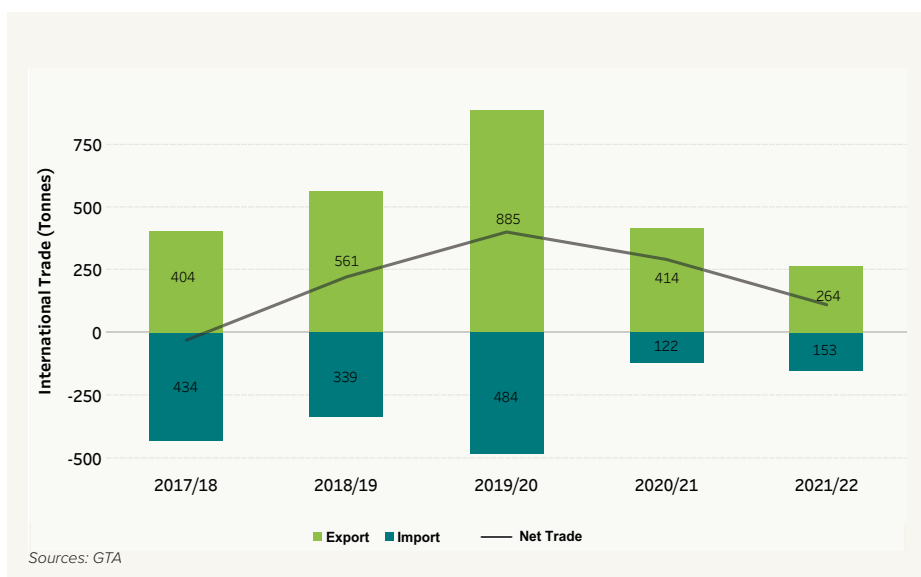
Source: SAL



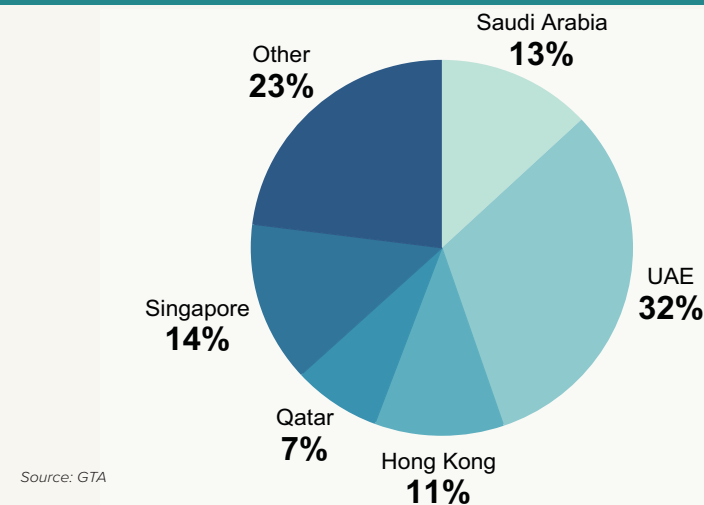
Fresh Apricots International Trade

FRESH APRICOTS INTERNATIONAL TRADE

Australia is a net exporter of fresh apricots. For the year ending June 2022, Australia exported **264 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH APRICOTS EXPORTS BY COUNTRY



For the year ending June 2022, **32%** of exported fresh apricots were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

FRESH APRICOTS IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	229	46	67	Victoria	672	362	210
Western Australia	76	43	50	New South Wales	193	44	41
Victoria	180	27	32	Queensland	13	3	12
Queensland	-	6	4	South Australia	3	1	1
Other	-	< 0.5	-	Tasmania	1	1	-
TOTAL	484	122	153	Other	4	3	-
				TOTAL	885	414	264

FRESH APRICOTS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New Zealand	479	108	149	UAE	95	66	84
Syria	-	-	3	Singapore	121	43	37
US	3	14	1	Saudi Arabia	311	64	34
Turkey	-	1	-	Hong Kong	16	28	29
Pakistan	2	-	-	Qatar	54	56	20
Other	< 0.5	< 0.5	-	Other	288	156	61
TOTAL	484	122	153	TOTAL	885	414	264

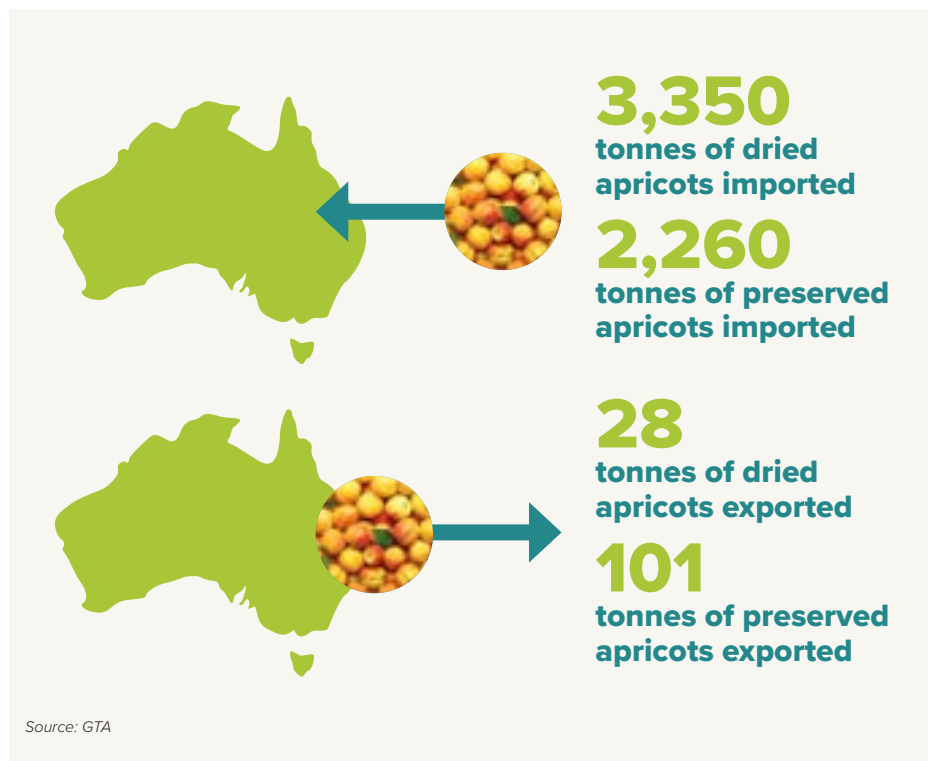
Source: GTA

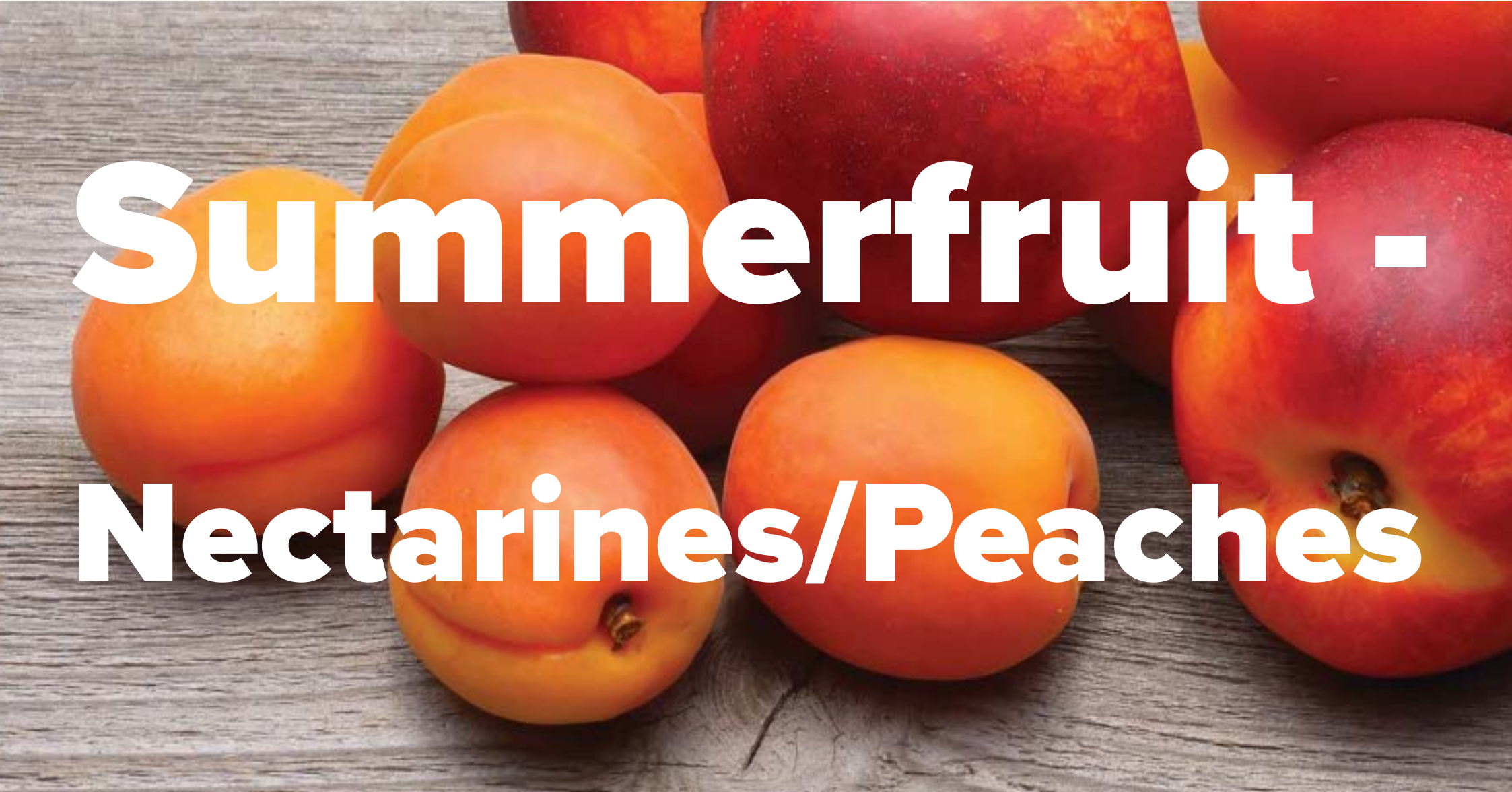


Processed Apricots International Trade

2021/22 PROCESSED APRICOTS INTERNATIONAL TRADE

For the year ending June 2022, an additional **3,350 tonnes** of dried apricots and **2,260 tonnes** of preserved apricots were imported, while **28 tonnes** of dried apricots and **101 tonnes** of preserved apricots were exported.



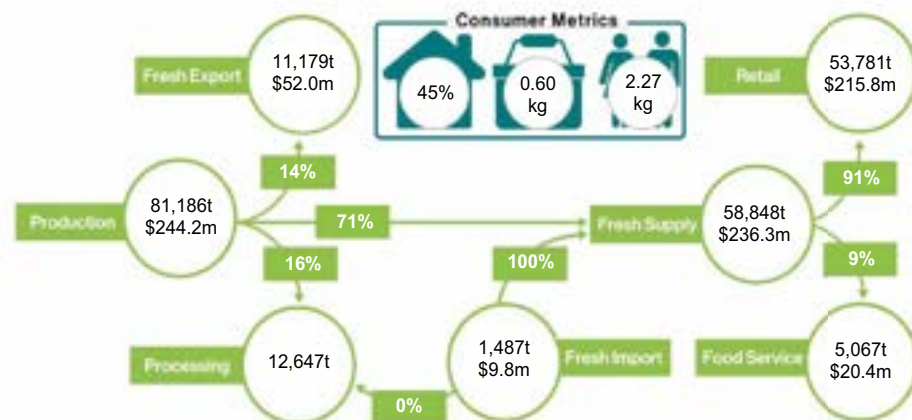


Summerfruit - Nectarines/Peaches



Fresh Nectarines/Peaches Overview

FRESH NECTARINES/PEACHES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

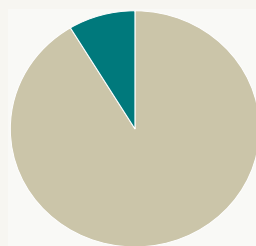
TOTAL PRODUCTION:



\$244.2M

81,186t produced and valued at **\$244.2M** with **16%** sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 91% ■ Food Service 9%

The wholesale value of the fresh supply was **\$236.3M**, with **\$215.8M** distributed into retail and **\$20.4M** into food service.

CONSUMER METRICS:



45%

45% of Australian households purchased nectarines/peaches, buying an average of **595g** per shopping trip.

PER CAPITA CONSUMPTION:

2.27kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	103,094	85,819	-17%	81,186	-5%
Production (\$m)	\$310.1	\$236.1	-24%	\$244.2	+3%
Producing Trees (000 Trees)	3,633	-	-	-	-
Fresh Export Volume (t)	15,170	13,187	-13%	11,179	-15%
Fresh Export Value (\$m)	\$64.4	\$59.3	-8%	\$52.0	-12%
Fresh Import Volume (t)	1,717	1,594	-7%	1,487	-7%
Fresh Import Value (\$m)	\$9.5	\$9.9	+4%	\$9.8	-1%
Fresh Supply (t)	72,320	60,593	-16%	58,848	-3%
Fresh Supply Wholesale Value (\$m)	\$301.2	\$219.2	-27%	\$236.3	+8%
Supply per Capita (kg)	2.80	2.35	-16%	2.27	-4%
Retail Supply (t)	66,213	55,495	-16%	53,781	-3%
Retail Supply Wholesale Value (\$m)	\$275.7	\$200.5	-27%	\$215.8	+8%
Food Service Supply (t)	6,107	5,098	-17%	5,067	>-1%
Food Service Wholesale Value (\$m)	\$25.4	\$18.7	-27%	\$20.4	+10%

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

Fresh Nectarines/Peaches Production

MAJOR PRODUCTION AREAS

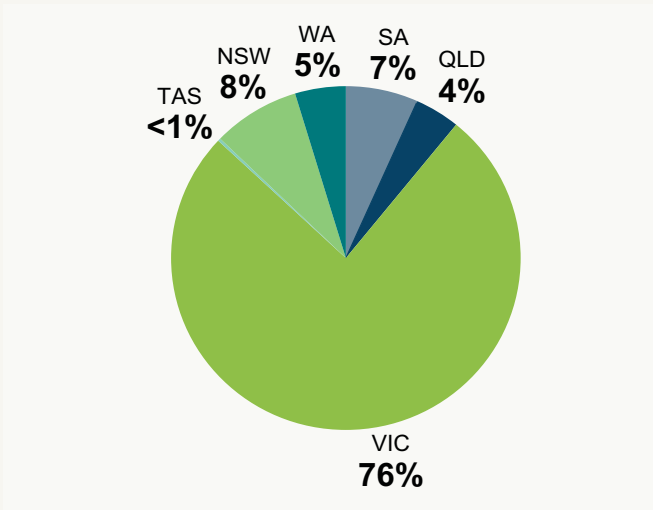


Source: SAL

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



2021/22 FRESH NECTARINES/PEACHES PRODUCTION BY STATE



Source: SAL

2021/22 FRESH NECTARINES/PEACHES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	61,789	\$184.9												
New South Wales	6,575	\$20.1												
South Australia	5,438	\$16.3												
Western Australia	3,797	\$11.8												
Queensland	3,381	\$10.4												
Tasmania	205	\$0.7												

Availability legend: High Medium Low None

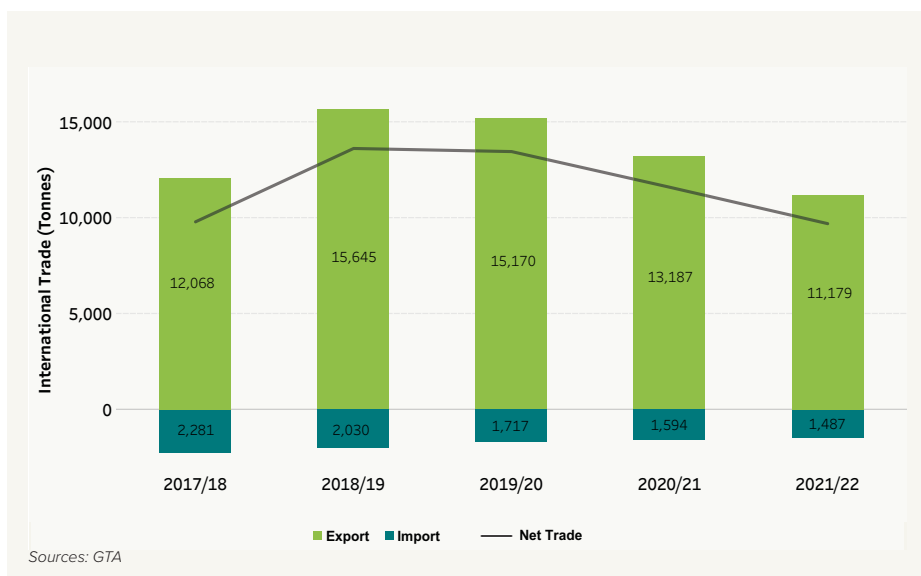
Source: SAL



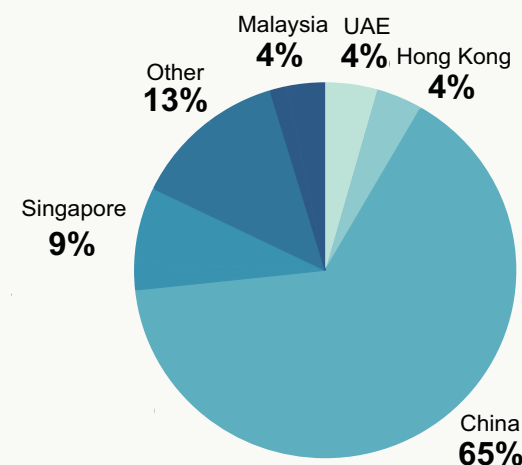
Fresh Nectarines/Peaches International Trade

FRESH NECTARINES/PEACHES INTERNATIONAL TRADE

Australia is a net exporter of fresh nectarines and peaches, with exports growing in recent years. For the year ending June 2022, Australia exported **11,179 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH NECTARINES/PEACHES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **65%** of exported fresh nectarines and peaches were sent to **China**, as profiled in the chart above.

FRESH NECTARINES/PEACHES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	1,028	1,030	826	Victoria	13,778	12,172	9,945
Victoria	434	295	304	South Australia	143	221	629
Western Australia	220	253	258	New South Wales	1,028	744	443
Queensland	36	16	99	Queensland	186	46	153
Other	-	< 0.5	-	Tasmania	5	1	1
TOTAL	1,717	1,594	1,487	Other	29	4	8
				TOTAL	15,170	13,187	11,179

FRESH NECTARINES/PEACHES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	1,626	1,583	1,453	China	7,685	6,899	7,264
China	61	-	35	Singapore	1,270	1,250	990
New Zealand	9	11	-	Malaysia	647	665	522
Other	20	< 0.5	-	UAE	1,067	1,025	490
TOTAL	1,717	1,594	1,487	Hong Kong	517	951	443
				Other	3,984	2,397	1,470
				TOTAL	15,170	13,187	11,179

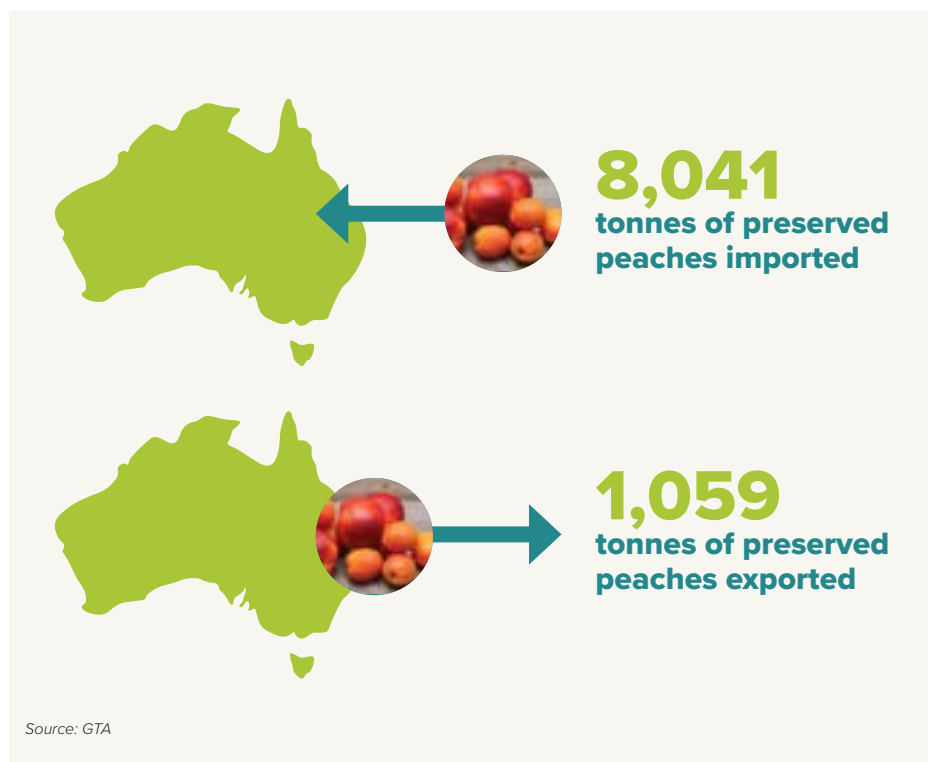
Source: GTA



Processed Nectarines/Peaches International Trade

2021/22 PROCESSED NECTARINES/PEACHES INTERNATIONAL TRADE

For the year ending June 2022, an additional **8,041 tonnes** of preserved peaches were imported, while **1,059 tonnes** of preserved peaches were exported.



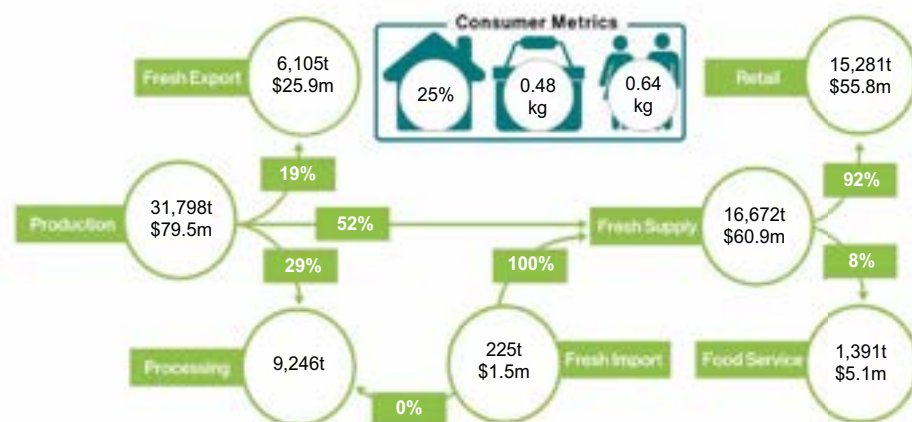


Summerfruit - Plums



Fresh Plums Overview

FRESH PLUMS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

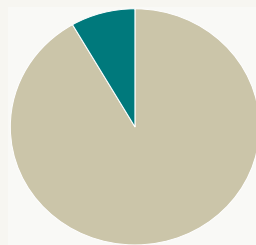
TOTAL PRODUCTION:



\$79.5M

31,798t produced and valued at **\$79.5M** with 29% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 92% ■ Food Service 8%

The wholesale value of the fresh supply was **\$60.9M**, with **\$55.8M** distributed into retail and **\$5.1M** into food service.

CONSUMER METRICS:



25%

25% of Australian households purchased plums, buying an average of **481g** per shopping trip.

PER CAPITA CONSUMPTION:

0.64kg



in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	27,348	32,924	+20%	31,798	-3%
Production (\$m)	\$74.4	\$77.5	+4%	\$79.5	+2%
Production area (Ha)	1,488	-	-	-	-
Fresh Export Volume (t)	5,214	7,383	+42%	6,105	-17%
Fresh Export Value (\$m)	\$20.6	\$30.4	+48%	\$25.9	-15%
Fresh Import Volume (t)	348	393	+13%	225	-43%
Fresh Import Value (\$m)	\$1.9	\$2.2	+14%	\$1.5	-32%
Fresh Supply (t)	14,529	16,360	+13%	16,672	+2%
Fresh Supply Wholesale Value (\$m)	\$61.0	\$55.0	-10%	\$60.9	+11%
Supply per Capita (kg)	0.56	0.64	+13%	0.64	+1%
Retail Supply (t)	13,329	15,009	+13%	15,281	+2%
Retail Supply Wholesale Value (\$m)	\$56.0	\$50.5	-10%	\$55.8	+11%
Food Service Supply (t)	1,200	1,351	+13%	1,391	+3%
Food Service Wholesale Value (\$m)	\$5.0	\$4.5	-10%	\$5.1	+12%

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

Fresh Plums Production

MAJOR PRODUCTION AREAS



Source: SAL

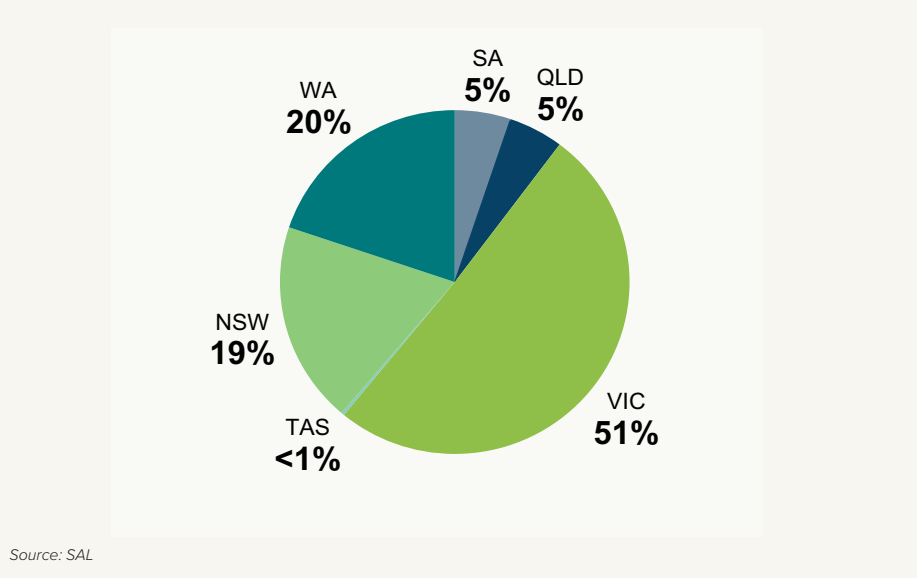
The majority of plum production occurs in the southern states, with Victoria being the major producing state.

PRODUCTION WINDOW:



Nov-May

2021/22 FRESH PLUMS PRODUCTION BY STATE



2021/22 FRESH PLUMS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	16,131	\$40.3												
Western Australia	6,309	\$15.8												
New South Wales	6,018	\$15.0												
South Australia	1,642	\$4.1												
Queensland	1,610	\$4.0												
Tasmania	88	\$0.2												

Availability legend: High Medium Low None

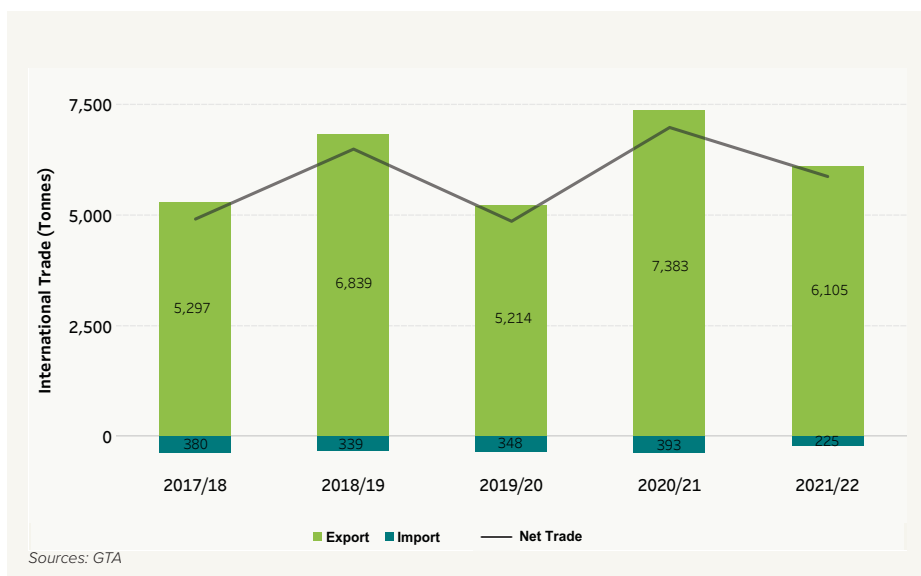
Source: SAL



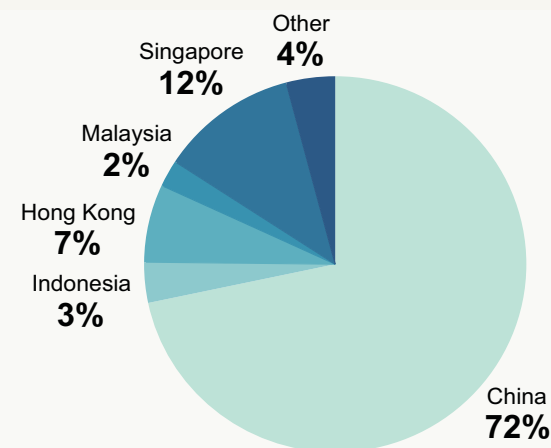
Fresh Plums International Trade

FRESH PLUMS INTERNATIONAL TRADE

Australia is a net exporter of fresh plums, with exports growing in recent years. For the year ending June 2022, Australia exported **6,105 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2021/22 FRESH PLUMS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **72%** of exported fresh plums were sent to **China**, as profiled in the chart above.

FRESH PLUMS IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	269	243	153	Victoria	3,750	6,029	5,136
Western Australia	42	51	37	New South Wales	956	934	795
Queensland	-	-	22	Western Australia	456	330	83
Victoria	37	98	13	South Australia	29	81	64
Other	-	-	< 0.5	Queensland	15	8	28
TOTAL	348	393	225	Other	9	< 0.5	< 0.5
				TOTAL	5,214	7,383	6,105

FRESH PLUMS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	348	392	222	China	2,728	4,356	4,378
Afghanistan	-	< 0.5	3	Singapore	651	849	713
India	-	1	-	Hong Kong	423	707	409
Pakistan	-	< 0.5	-	Indonesia	869	469	212
Other	-	1	-	Malaysia	229	248	141
TOTAL	348	393	225	Other	314	754	252
				TOTAL	5,214	7,383	6,105

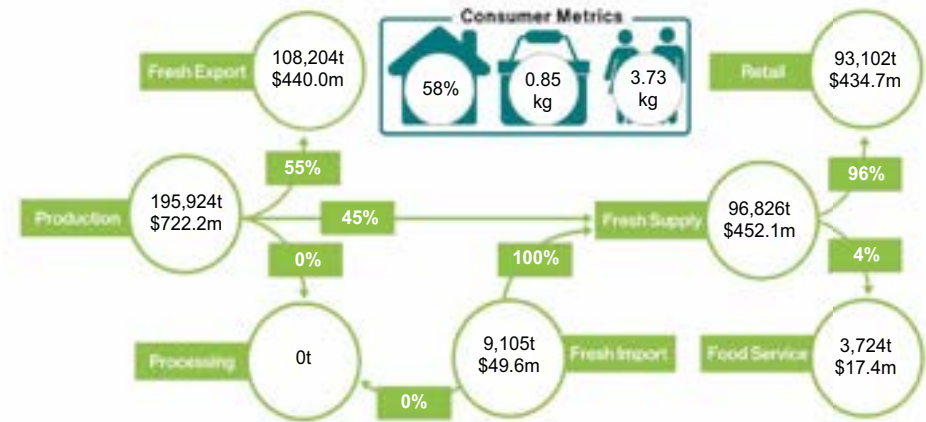
Source: GTA



Table Grapes

Fresh Table Grapes Overview

FRESH TABLE GRAPES SUPPLY CHAIN – YEAR ENDING JUNE 2022

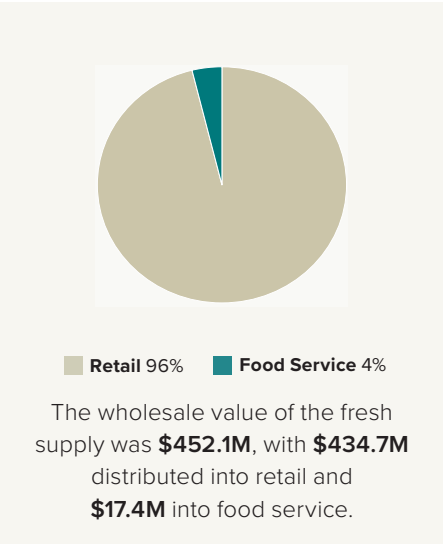


Sources: Australian Table Grape Association (ATGA); AC; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

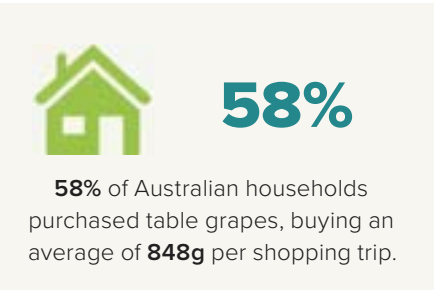
TOTAL PRODUCTION:



RETAIL VS FOOD SERVICE:



CONSUMER METRICS:



PER CAPITA CONSUMPTION:

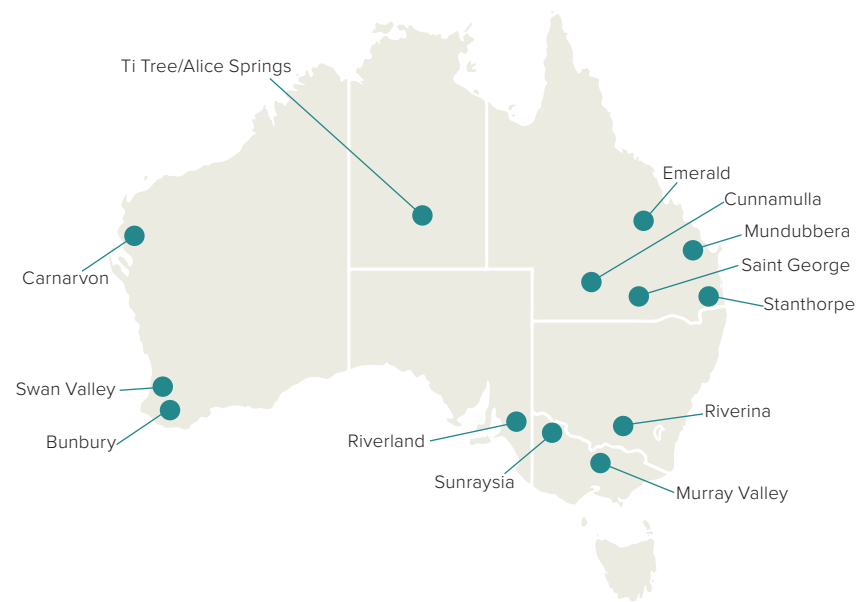


YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	214,660	198,389	-8%	195,924	-1%
Production (\$m)	\$750.4	\$631.8	-16%	\$722.2	+14%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	152,180	120,725	-21%	108,204	-10%
Fresh Export Value (\$m)	\$622.9	\$460.7	-26%	\$440.0	-4%
Fresh Import Volume (t)	16,364	12,033	-26%	9,105	-24%
Fresh Import Value (\$m)	\$85.1	\$58.9	-31%	\$49.6	-16%
Fresh Supply (t)	78,843	89,697	+14%	96,826	+8%
Fresh Supply Wholesale Value (\$m)	\$328.1	\$326.3	>-1%	\$452.1	+39%
Supply per Capita (kg)	3.06	3.48	+14%	3.73	+7%
Retail Supply (t)	75,448	85,425	+13%	93,102	+9%
Retail Supply Wholesale Value (\$m)	\$314.0	\$310.8	-1%	\$434.7	+40%
Food Service Supply (t)	3,395	4,271	+26%	3,724	-13%
Food Service Wholesale Value (\$m)	\$14.1	\$15.5	+10%	\$17.4	+12%

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

Fresh Table Grapes Production

MAJOR PRODUCTION AREAS



Source: ATGA

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

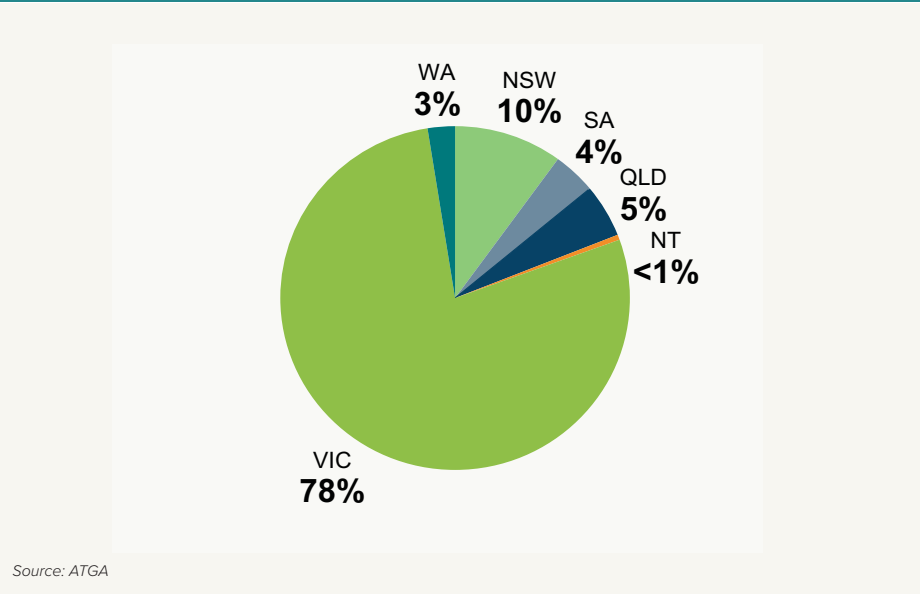
PRODUCTION AREA:



PRODUCTION WINDOW:



2021/22 FRESH TABLE GRAPES PRODUCTION BY STATE



2021/22 FRESH TABLE GRAPES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	152,821	\$563.3												
New South Wales	19,592	\$72.2												
Queensland	9,796	\$36.1												
South Australia	7,837	\$28.9												
Western Australia	4,918	\$18.1												
Northern Territory	960	\$3.5												

Availability legend: High Medium Low None

Source: ATGA

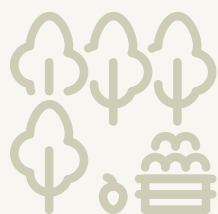


MAIN TABLE GRAPES VARIETIES

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

Menindee and **Thompson**, the two most common green varieties in Australia. These grapes accounted for **38%** of fresh production for the year ending June 2022.

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



Menindee & Thompson
38%

Crimson, Flame & Globe
30%

Sources: CA

2021/22 FRESH TABLE GRAPES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Menindee	26,471					Low	Medium	High	Medium				
White - Thompson	50,905							Medium	High	High	High	Medium	
Red - Crimson	38,688							Medium	High	High	Medium	Medium	
Red - Flame	12,217					Low	Medium	Medium	Medium				
Red - Globe	10,181							Medium	Medium	Medium	Medium	Medium	
Black	8,112						Medium	Medium	Medium				
Other	57,047						Medium	Medium	High	High	Medium	Medium	

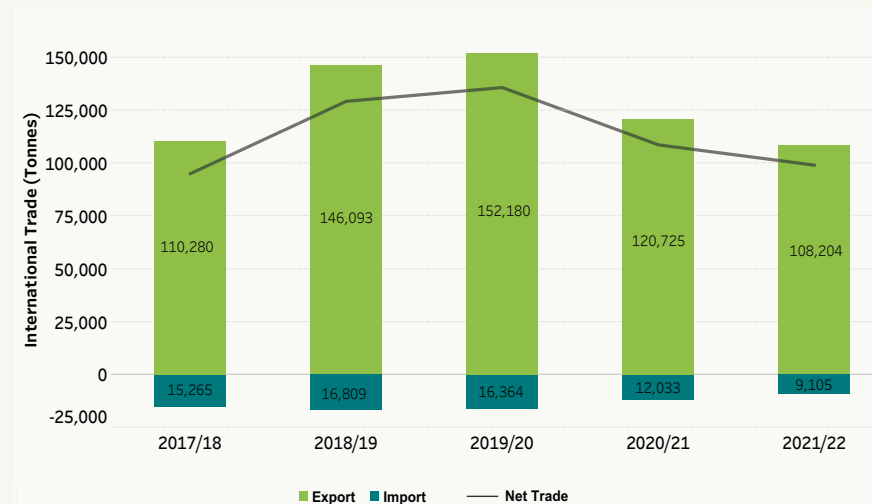
Availability legend: High Medium Low None

Sources: CA

Fresh Table Grapes International Trade

FRESH TABLE GRAPES INTERNATIONAL TRADE

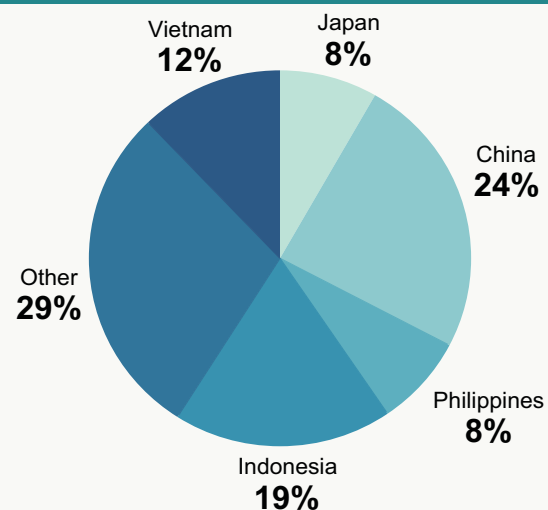
Australia is a net exporter of fresh table grapes, with exports growing in recent years. For the year ending June 2022, Australia exported **108,204 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA



2021/22 FRESH TABLE GRAPES EXPORTS BY COUNTRY



Source: GTI

For the year ending June 2022, **24%** of exported fresh table grapes were sent to **China**, as profiled in the chart above.

FRESH TABLE GRAPES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
New South Wales	8,725	4,882	5,007	Victoria	137,666	107,742	96,768
Victoria	5,223	6,186	2,944	New South Wales	12,387	8,861	9,013
Western Australia	1,406	779	981	Queensland	474	3,746	1,172
Queensland	1,010	20	109	Western Australia	1,169	103	961
South Australia	-	166	65	South Australia	415	137	289
TOTAL	16,364	12,033	9,105	Other	68	137	< 0.5
				TOTAL	152,180	120,725	108,204

FRESH TABLE GRAPES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
US	15,688	11,306	8,612	China	62,930	43,013	26,392
Mexico	530	663	435	Indonesia	13,321	16,594	20,048
China	111	55	42	Vietnam	7,867	7,018	13,129
Sth. Korea	35	8	16	Japan	11,430	9,504	8,950
Other	-	-	< 0.5	Philippines	8,172	8,446	8,473
TOTAL	16,364	12,033	9,105	Other	48,460	36,150	31,212
				TOTAL	152,180	120,725	108,204

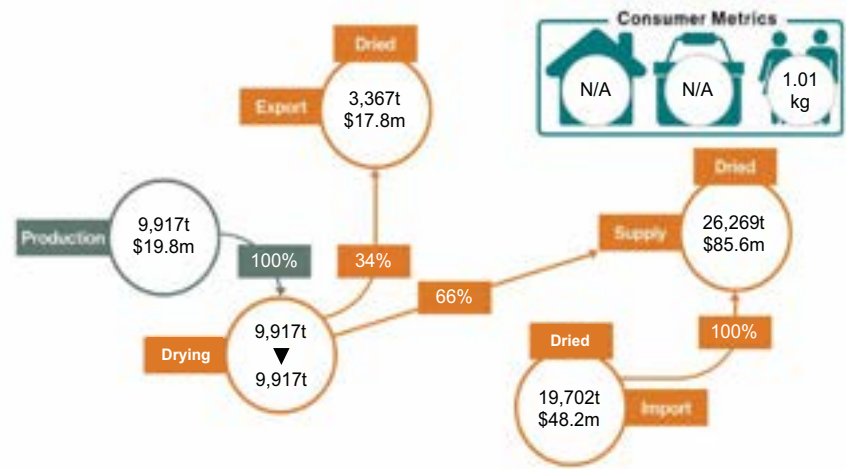
Source: GTA



Dried Grapes

Dried Grapes Overview

DRIED GRAPES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

TOTAL PRODUCTION:



\$19.8M

9,917t produced and valued at **\$19.8M** with **100%** of production going through the drying process.

PER CAPITA CONSUMPTION:



1.01kg

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Dried Production (t)	13,250	13,037	-2%	9,917	-24%
Production (\$m)	\$29.1	\$25.3	-13%	\$19.8	-22%
Production area (Ha)	3,257	3,257	-	3,257	-
Dried Export Volume (t)	5,267	4,702	-11%	3,367	-28%
Dried Export Value (\$m)	\$30.5	\$24.1	-21%	\$17.8	-26%
Dried Import Volume (t)	22,214	20,060	-10%	19,720	-2%
Dried Import Value (\$m)	\$67.7	\$51.2	-24%	\$48.2	-6%
Dried Supply (t)	30,197	28,395	-6%	26,269	-7%
Dried Supply Wholesale Value (\$m)	\$123.2	\$96.9	-21%	\$85.6	-12%
Supply per Capita (kg)	1.17	1.10	-6%	1.01	-8%

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

Dried Grapes Production

MAJOR PRODUCTION AREAS



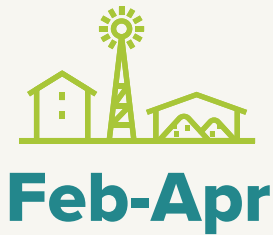
Source: DFA

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

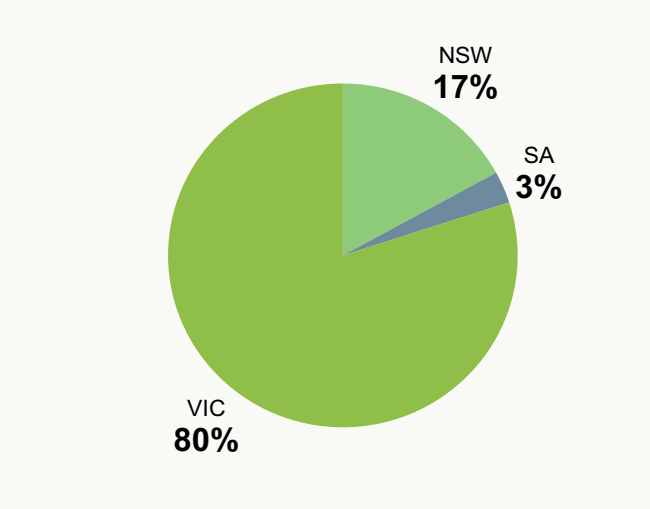
PRODUCTION AREA:



PRODUCTION WINDOW:



2021/22 DRIED GRAPES PRODUCTION BY STATE



Source: DFA

2021/22 DRIED GRAPES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	7,934	\$15.9								High	Medium	Medium		
New South Wales	1,686	\$3.4								Medium	Medium	Medium		
South Australia	298	\$0.6								Medium	Medium	Low		

Availability legend: High Medium Low None

Source: DFA



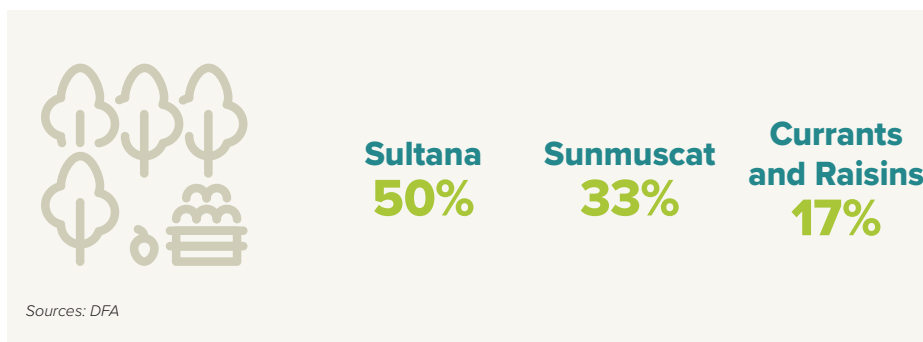
MAIN DRIED GRAPES VARIETIES

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

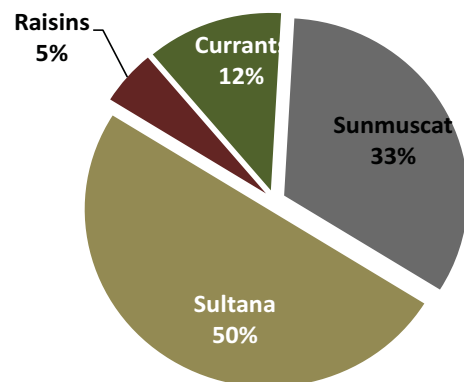
Sultana, which are the most commonly dried grape variety in Australia. These dried grapes accounted for **50%** of production.

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

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



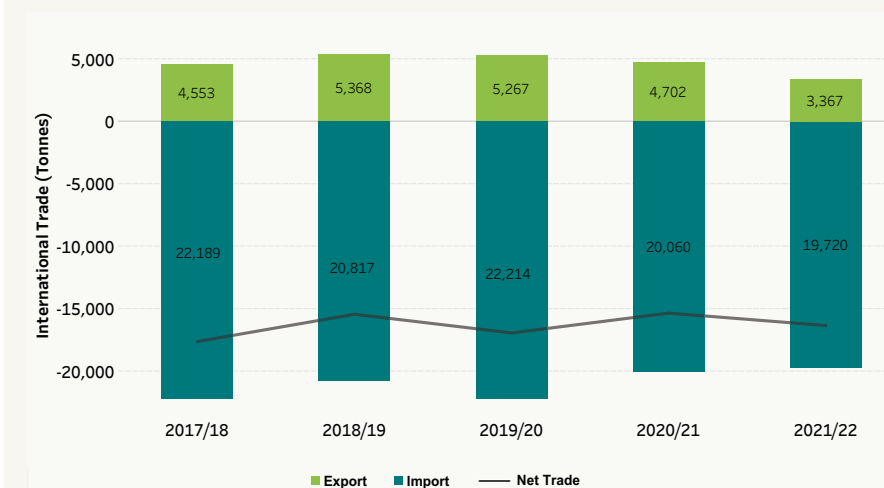
2021/22 MAIN DRIED GRAPES BY VARIETY



Processed Dried Grapes International Trade

PROCESSED DRIED GRAPES INTERNATIONAL TRADE

For the year ending June 2022, Australia imported **19,720 tonnes** of dried grapes. The exports and imports of dried grapes over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.

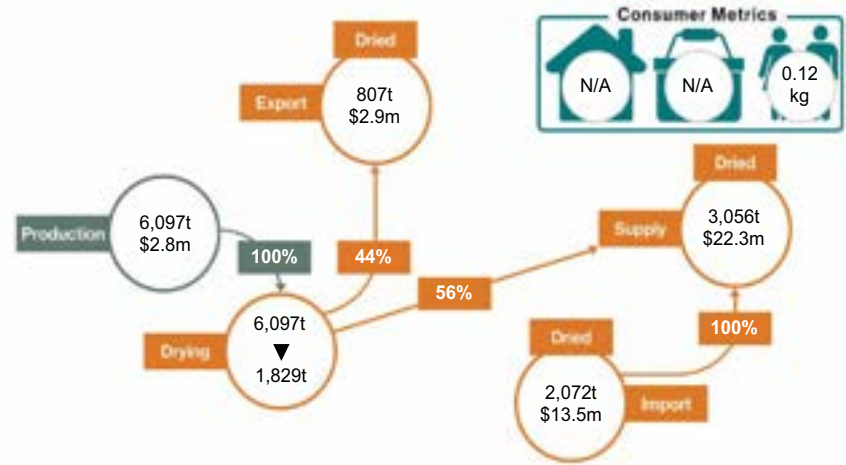


Prunes



Prunes Overview

PRUNES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

TOTAL PRODUCTION:



\$2.8M

6,097t produced and valued at \$2.8M with 100% of production going through the drying process.

PER CAPITA CONSUMPTION:



0.12kg

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Dried Production (t)	2,632	2,117	-20%	1,829	-14%
Production (\$m)	\$5.8	\$5.4	-8%	\$2.8	-48%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	250	12	-95%	807	>100%
Dried Export Value (\$m)	\$0.6	< \$0.1	-87%	\$2.9	>100%
Dried Import Volume (t)	2,356	2,404	+2%	2,072	-14%
Dried Import Value (\$m)	\$11.7	\$10.2	-12%	\$13.5	+32%
Dried Supply (t)	4,699	4,471	-5%	3,056	-32%
Dried Supply Wholesale Value (\$m)	\$26.1	\$21.3	-18%	\$22.3	+5%
Supply per Capita (kg)	0.18	0.17	-5%	0.12	-32%

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



Prunes Production

MAJOR PRODUCTION AREAS



Source: DFA

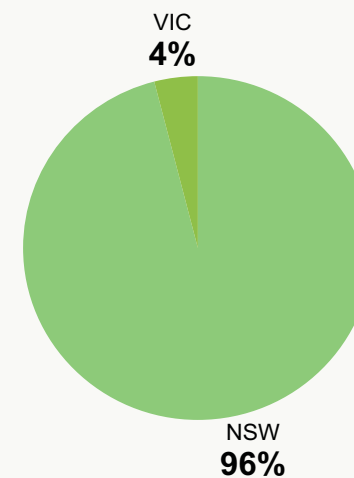
Plums grown for drying are predominantly grown in New South Wales and Victoria, with Griffith being the major producing area.

PRODUCTION WINDOW:



Nov-May

2021/22 PRUNES PRODUCTION BY STATE



Source: DFA

2021/22 PRUNES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,853	\$2.7												
Victoria	244	\$0.1												

Availability legend: High Medium Low None

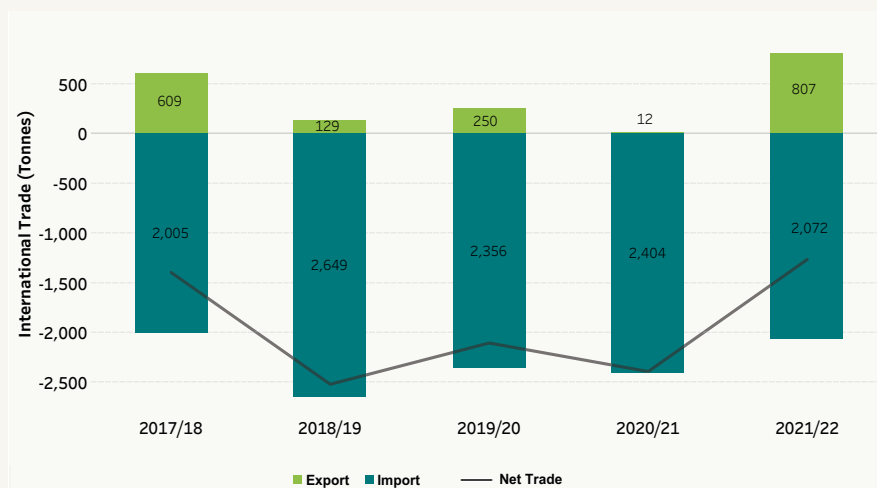
Source: DFA



Prunes International Trade

PRUNES INTERNATIONAL TRADE

For the year ending June 2022, Australia imported **2,072 tonnes** and exported **807 tonnes** of prunes. The exports and imports of prunes over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



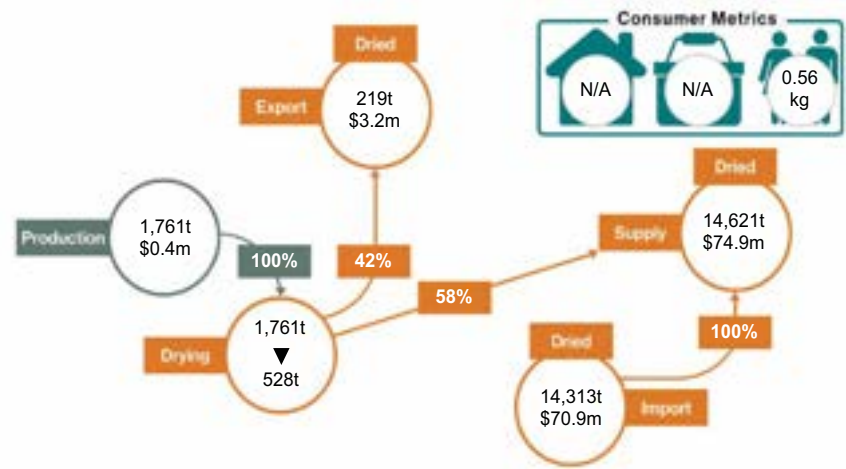
Sources: GTA



Other Dried Tree Fruit

Other Dried Tree Fruit Overview

OTHER DRIED TREE FRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

TOTAL PRODUCTION:



\$0.4M

1,761t produced and valued at **\$0.4M** with 100% of production going through the drying process.

PER CAPITA CONSUMPTION:



0.56kg

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Dried Production (t)	647	610	-6%	528	-13%
Production (\$m)	\$0.7	\$0.6	-19%	\$0.4	-22%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	177	190	+7%	219	+15%
Dried Export Value (\$m)	\$3.7	\$3.6	-3%	\$3.2	-12%
Dried Import Volume (t)	16,494	16,101	-2%	14,313	-11%
Dried Import Value (\$m)	\$73.9	\$68.9	-7%	\$70.9	+3%
Dried Supply (t)	16,963	16,521	-3%	14,621	-11%
Dried Supply Wholesale Value (\$m)	\$82.7	\$76.1	-8%	\$74.9	-2%
Supply per Capita (kg)	0.66	0.64	-2%	0.56	-12%

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



Dried Tree Fruit Production

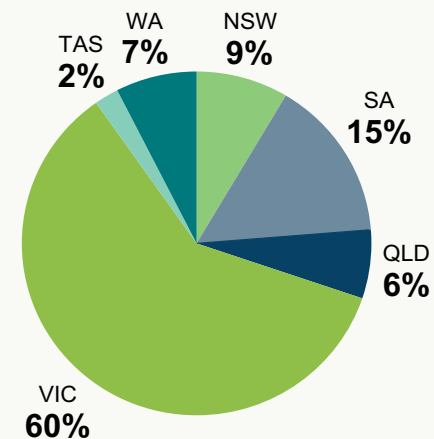
MAJOR PRODUCTION AREAS



Source: DFA

Dried tree fruits other than plums are a combination from different categories, predominantly summerfruits. The majority of the fruit grown for this category are from the Riverland, Sunraysia and Goulburn Valley regions.

2021/22 DRIED TREE FRUIT PRODUCTION BY STATE



Source: DFA



MAIN DRIED TREE FRUIT VARIETIES

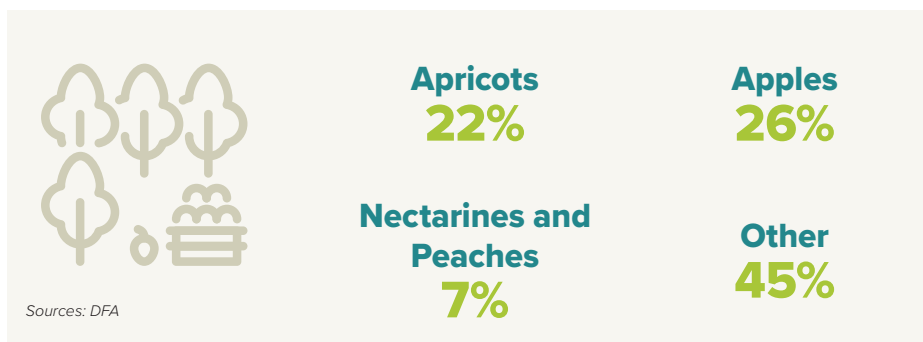
There are a number of tree fruits grown for drying in Australia which can be broadly grouped into main types. These are:

Apricots, accounted for **22%** of production.

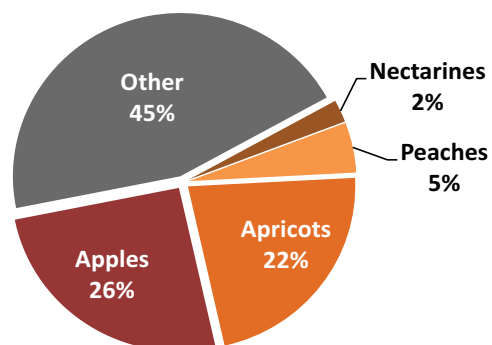
Apples, grown for drying accounted for **26%** production.

Nectarines and **Peaches**, accounted for **7%** of production.

Other fruits grown for drying, including Pineapples, Mandarins and Pears, accounted for **45%** of production.



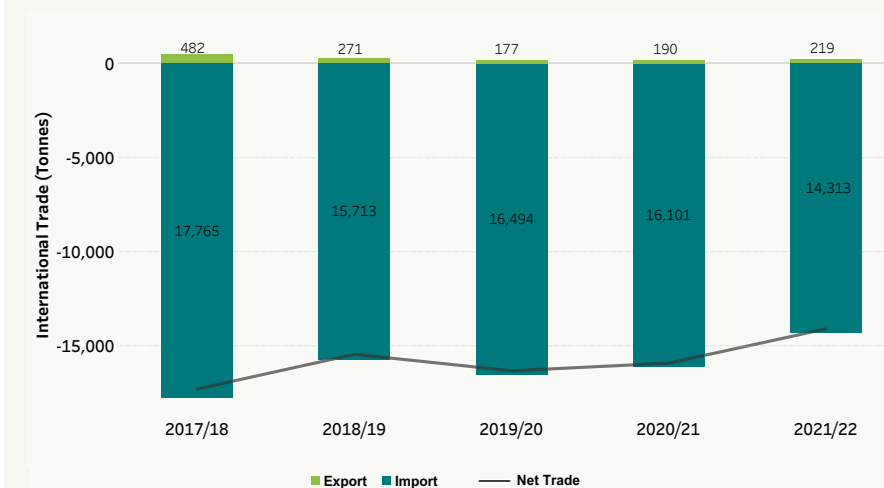
2021/22 MAIN DRIED TREE FRUIT BY VARIETY



Processed Dried Tree Fruit International Trade

PROCESSED DRIED TREE FRUIT INTERNATIONAL TRADE

For the year ending June 2022, Australia imported **14,313 tonnes** of dried tree fruit. The exports and imports of dried tree fruit over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.

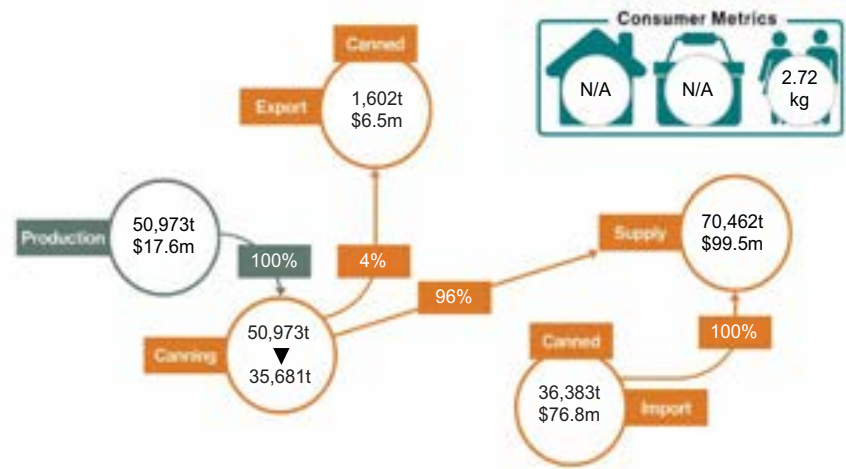




Canned Fruits

Canned Fruits Overview

CANNED FRUITS SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

TOTAL PRODUCTION:



\$17.6M

50,973t produced and valued at **\$17.6M** with 100% of produced sent to canning process resulting in 35,681t of canned product.

PER CAPITA CONSUMPTION:



2.72kg

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Canned Production (t)	36,279	36,012	>-1%	35,681	>-1%
Production (\$m)	\$18.4	\$17.2	-6%	\$17.6	+3%
Production area (Ha)	-	-	-	-	-
Canned Export Volume (t)	1,619	683	-58%	1,602	>100%
Canned Export Value (\$m)	\$6.4	\$4.0	-37%	\$6.5	+61%
Canned Import Volume (t)	34,252	35,490	+4%	36,383	+3%
Canned Import Value (\$m)	\$65.6	\$69.2	+6%	\$76.8	+11%
Canned Supply (t)	68,912	70,819	+3%	70,462	>-1%
Supply Wholesale Value (\$m)	\$94.8	\$145.8	+54%	\$99.5	-32%
Supply per Capita (kg)	2.67	2.75	+3%	2.72	-1%

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

Canned Fruits Production

MAJOR PRODUCTION AREAS

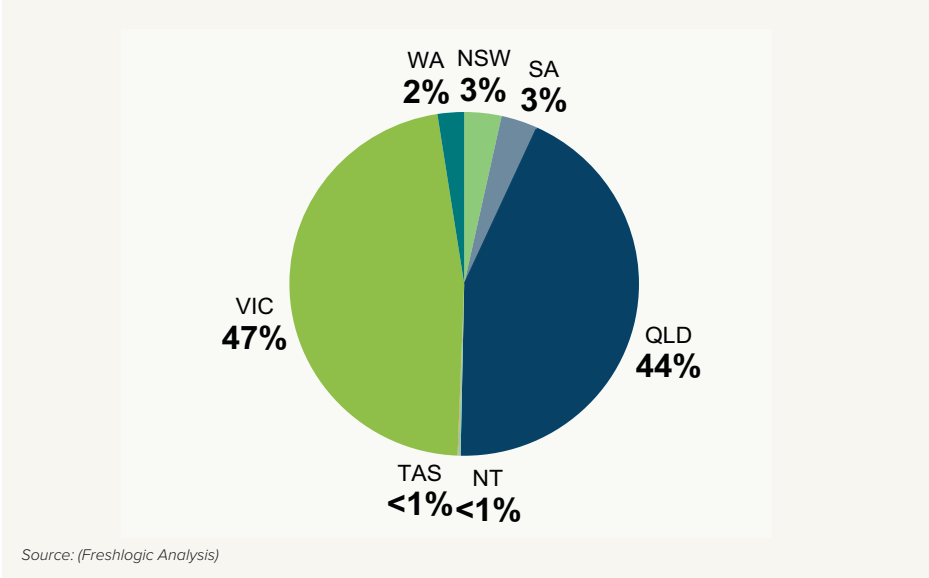


Source: (Freshlogic Analysis)

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



2021/22 CANNED FRUITS PRODUCTION BY STATE



2021/22 CANNED FRUITS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	23,931	\$8.3				High	High	High	High	High	High	High	High	
Queensland	22,191	\$7.7				High	High	High	High	High	High	High	High	
New South Wales	1,748	\$0.6				High	High	High	High	High	High	High	High	
South Australia	1,721	\$0.6				High	High	High	High	High	High	High	High	
Western Australia	1,246	\$0.4				High	High	High	High	High	High	High	High	
Tasmania	107	\$0.0				High	High	High	High	High	High	High	High	
Northern Territory	30	\$0.0							High	High	High			

Availability legend: High Medium Low None

Source: (Freshlogic Analysis)



MAIN CANNED FRUITS PRODUCTS

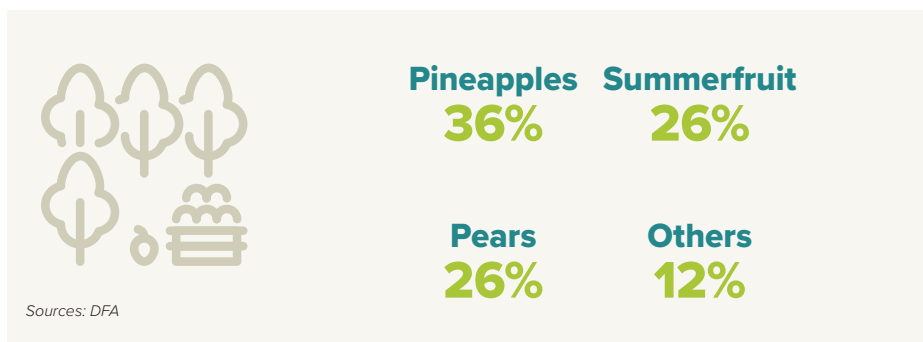
There are a number of categories of tree fruits grown for canning in Australia, consisting mainly of three types for the year ending 2022. These include:

Pineapples, accounting for **36%** of canned fruit processing this year.

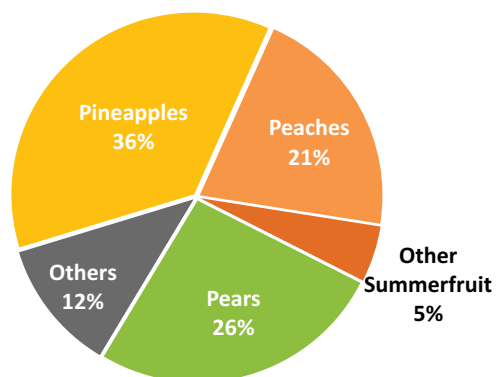
Summerfruit including **peaches**, **apricots** and **plums** from the Goulburn region accounting for **26%** of canned fruit production.

Pears, accounted for **26%** of the fruit grown for canning in Australia.

Other fruits, accounted for **12%** of the remaining canned fruit.



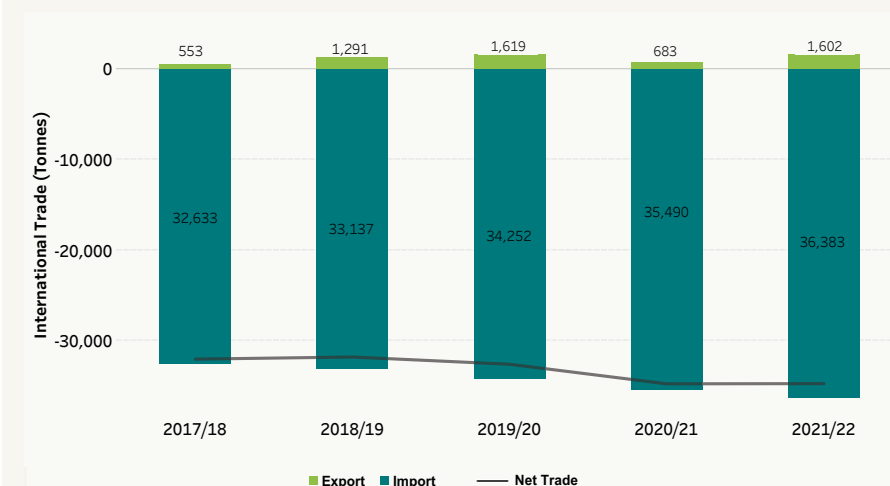
2021/22 MAIN CANNED FRUITS BY VARIETY



Processed Canned Fruits International Trade

PROCESSED CANNED FRUITS INTERNATIONAL TRADE

For the year ending June 2022, Australia imported **36,383 tonnes** of canned fruit. The exports and imports of canned fruits over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.

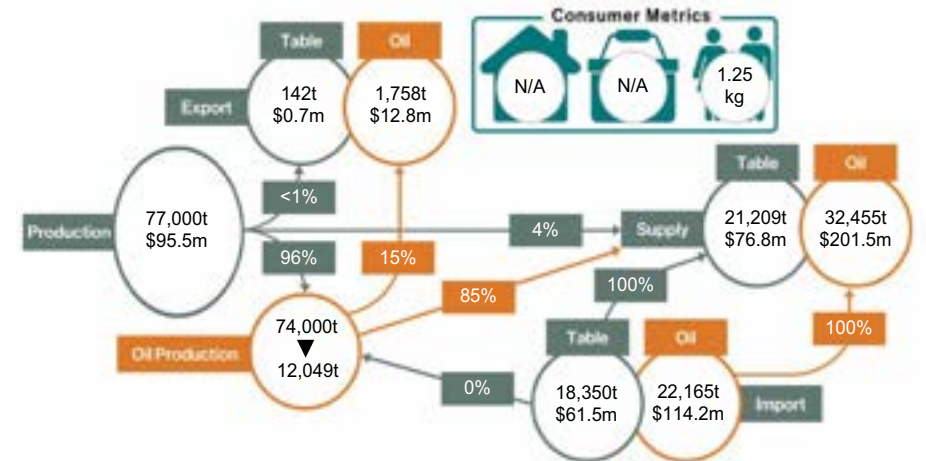


Olives



Olives Overview

OLIVE OIL/TABLE OLIVE SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

TOTAL PRODUCTION:



\$95.5M

77,000t produced and valued at \$95.5M with 98% of produced sent to oil production resulting in 12,049t of olive oil.

PER CAPITA CONSUMPTION:



1.25kg

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	50,000	130,000	>100%	77,000	-41%
Production (\$m)	\$62.0	\$161.2	>100%	\$95.5	-41%
Production area (Ha)	20,568	21,250	+3%	21,250	-
Olive Oil Export Volume (t)	2,681	2,061	-23%	1,758	-15%
Olive Oil Export Value (\$m)	\$18.8	\$14.2	-25%	\$12.8	-10%
Olive Oil Import Volume (t)	36,464	37,201	+2%	22,165	-40%
Olive Oil Import Value (\$m)	\$181.8	\$175.8	-3%	\$114.2	-35%
Olive Oil Supply (t)	42,445	55,818	+32%	32,455	-42%
Olive Oil Wholesale Value (\$m)	\$224.6	\$320.6	+43%	\$201.5	-37%
Oil Consumption per Capita (kg)	1.65	2.17	+32%	1.25	-42%

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

Olives Production

MAJOR PRODUCTION AREAS



Source: AOA

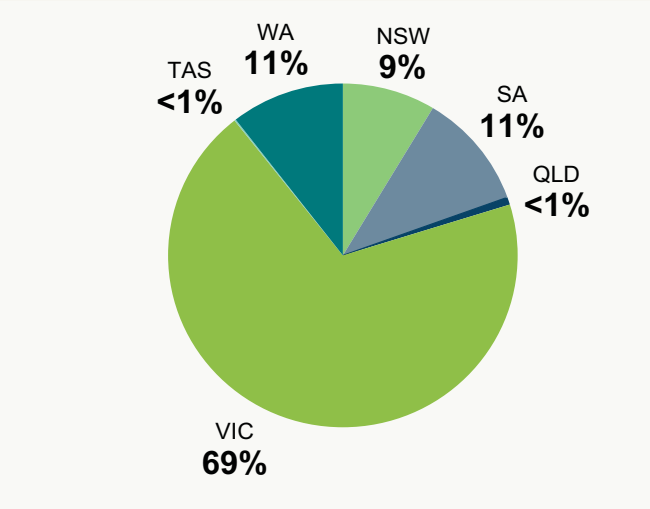
Olives are grown in many states of Australia. with the majority of production being grown in Victoria. Almost all olives grown in Australia are grown for the production of olive oil, with some grown for use as table olives.

PRODUCTION WINDOW:



Mar-Aug

2021/22 OLIVES PRODUCTION BY STATE



Source: AOA

2021/22 OLIVES SEASONALITY BY STATE

State	Area (ha)	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	12,326	53,246	\$66.0	Low	None	None	None	None	None	None	None	None	Medium	High	High
South Australia	6,145	8,393	\$10.4	None	None	None	None	None	None	None	None	None	Low	High	Medium
New South Wales	6,132	6,622	\$8.2	None	None	None	None	None	None	None	None	None	Low	Medium	Medium
Western Australia	5,860	8,085	\$10.0	None	None	None	None	None	None	None	None	None	Medium	High	Medium
Queensland	2,938	554	\$0.7	None	None	None	None	None	None	None	None	Low	Low	Low	None
Tasmania	194	100	\$0.1	Low	Low	None	None	None	None	None	None	None	None	Low	Low

Availability legend: High Medium Low None

Source: AOA



Olive Oil International Trade

OLIVE OIL INTERNATIONAL TRADE

For the year ending June 2022, Australia imported **22,165 tonnes** of olive oil (**this number does not include table olives**). The exports and imports of olive oil over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.

